

Joint Longitudinal Viewer (JLV) 2.9.2

User Guide



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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
- **Provider Portal:** The landing page, or default view, of JLV that appears after logging into the application that displays widgets and the tools that enable quick access to basic features
- **Tab:** A component of the JLV interface that displays the **Patient** and **Provider** portals 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 pages that provides access to all widgets available for placement on the portal pages

1.2. Assumptions

The user guide is written from the perspective of VA 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 [JLV Resources](#) 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.

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.

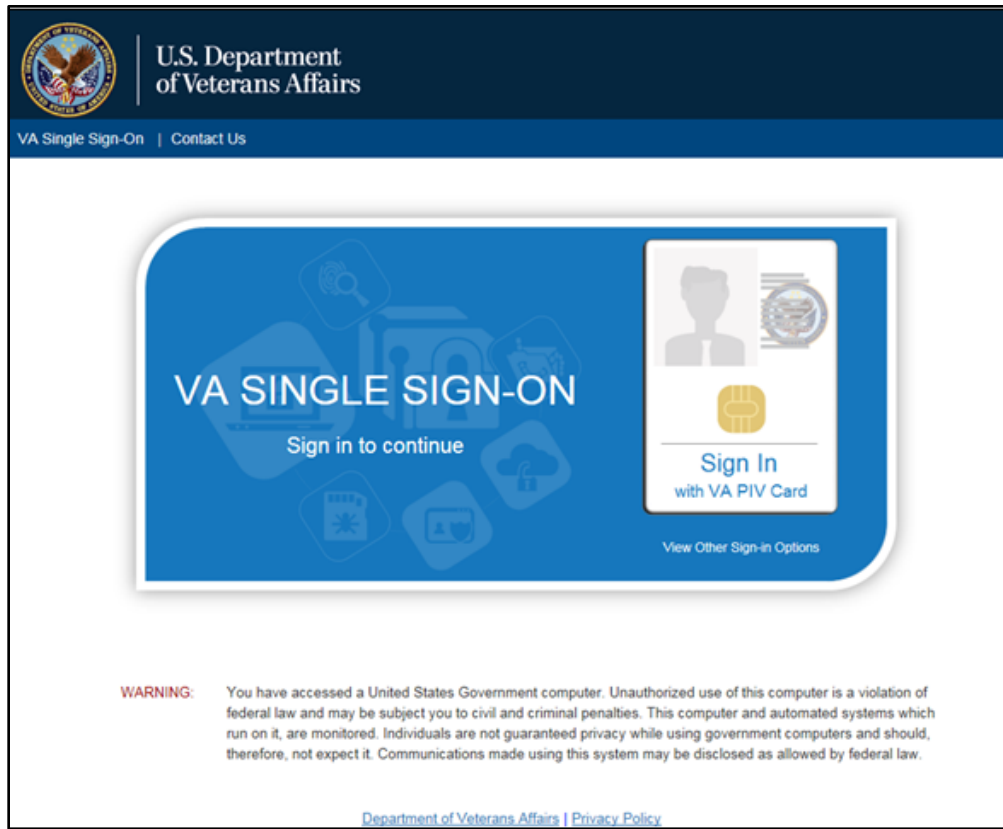
 **NOTE:** There is no functionality available to change a user identification (ID) and password in JLV. See [Troubleshooting](#) for information about login errors, Access code errors, or Verify code errors.

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.

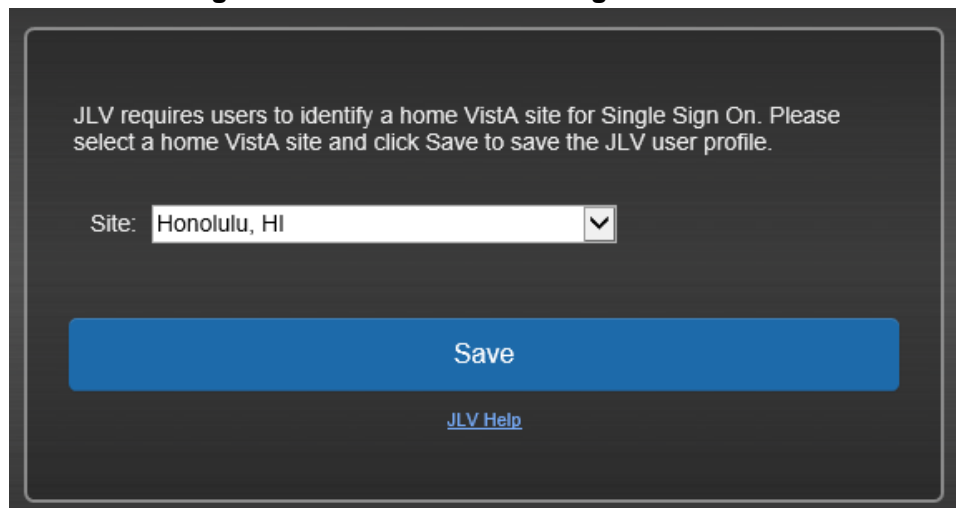
1. Enter the JLV URL REDACTED into the address bar of your Internet browser, select the **JLV** button CPRS if available, or select the **JLV** button in PowerChart
 - a. You are redirected to the **VA Single Sign-On Internal (SSOi)** page ([Figure 1](#))

Figure 1: SSOi Page for VA Users



2. Click the **Sign in with VA PIV Card** button
3. Select the 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



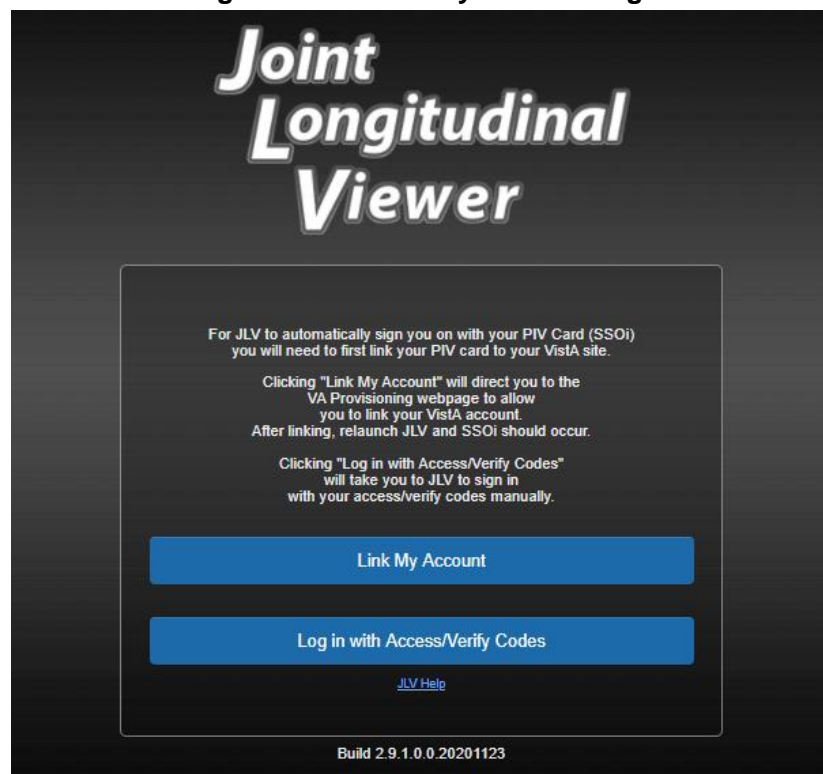
- b. If your PIV card is properly linked to the home VistA site you selected, the **Government Information System Acknowledgement** displays
 - c. If your PIV is not properly linked to the home VistA site you selected, the **Link My Account** page displays ([Figure 3, Link Your PIV Card and VistA Account](#))
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](#)
 - a. **Link My Account** page displays ([Figure 3](#))

Figure 3: JLV Link My Account Page



2. Select the **Link My Account** button
 - a. JLV redirects the user to the **IAM Provisioning Services** page ([Figure 4](#))

Figure 4: IAM Provisioning Services Link VistA User Page

The screenshot shows the IAM Provisioning Services interface. At the top, it says 'IAM Provisioning Services [VAEC Development]' and 'Tuesday May 5th, 2020'. On the left is a navigation menu with 'Request for Self', 'Request for Others', and 'Link VistA User'. The main content area has three sections: 1. 'VistA instances that are already bound' with a table header (Instance, Name, Status) and a message: 'NO VISTA STATIONS LINKED TO YOUR ACCOUNT IN PROVISIONING.' 2. 'My User Account Information' with fields for Network Id, User Name, and VA Email Address. 3. 'User Account Request Information' with fields for Link Account (dropdown), Access Code, and Verify Code, and Submit/Cancel buttons.

i **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.

3. Click the **Link VistA** User link ([Figure 4](#))

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

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

i **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.

5. Enter your Access and Verify codes for the selected VistA instance

6. Click **Submit**

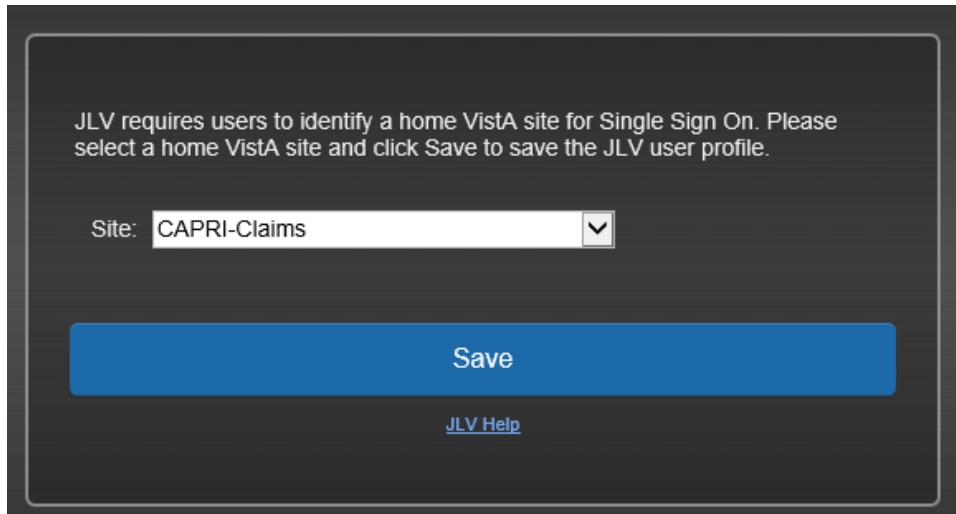
2.2. CAPRI-Claims User Login

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

i **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](#))
2. Click the **Sign in with VA PIV Card** button
3. Select the authentication certificate *Veterans Affairs User CA B1*, and click **OK**
4. 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



JLV requires users to identify a home VistA site for Single Sign On. Please select a home VistA site and click Save to save the JLV user profile.

Site: CAPRI-Claims

Save

[JLV Help](#)

- i** **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

Joint
Longitudinal
Viewer

Accessibility Mode

Vista Access Code:

Vista Verify Code:

Agency: VA Site: CAPRI-Claims

[Edit Profile](#)

Login

System Status

JLV data sources available.

[JLV Help](#)

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5. Read the important user consent information regarding access to a Government information system, and click **I Accept**
6. 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)
7. 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
8. 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](#).


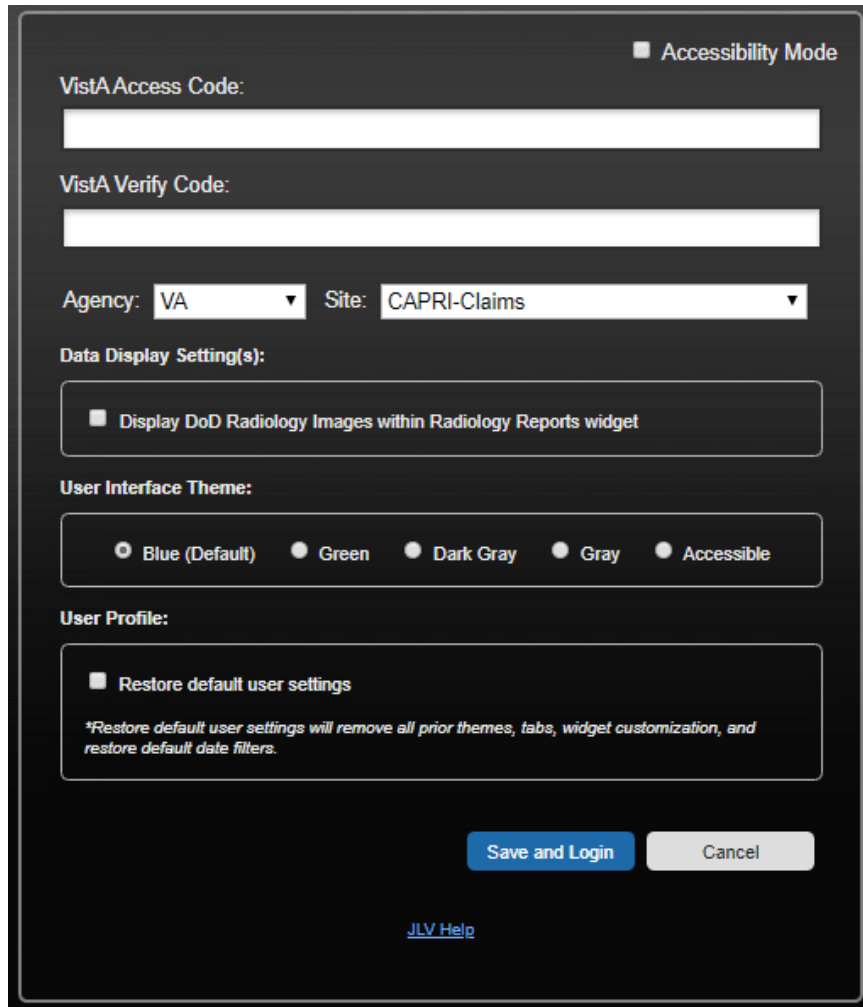
- i** **NOTE:** Only CAPRI-Claims users and those who haven't yet linked their VistA accounts to their PIV can load the **Login** page and access the **Edit Profile** link. SSOi users with linked VistA accounts load the **Provider Portal** directly and can change their configurations from the  on the portal pages as described in [Customizing JLV](#).
- i** **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



The screenshot shows a dark-themed dialog box for editing user profile settings. At the top right, there is a checkbox for "Accessibility Mode". Below this are two text input fields: "VistA Access Code:" and "VistA Verify Code:". Underneath are two dropdown menus: "Agency:" with "VA" selected and "Site:" with "CAPRI-Claims" selected. The "Data Display Setting(s):" section contains a checkbox for "Display DoD Radiology Images within Radiology Reports widget". The "User Interface Theme:" section has five radio button options: "Blue (Default)", "Green", "Dark Gray", "Gray", and "Accessible". The "User Profile:" section includes a checkbox for "Restore default user settings" and a note: "*Restore default user settings will remove all prior themes, tabs, widget customization, and restore default date filters." At the bottom right are two buttons: "Save and Login" (highlighted in blue) and "Cancel". A "JLV Help" link is located at the bottom center.

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 pages, 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.



3. The Elements and Functionality of JLV

3.1. The JLV Portal Pages

After a successful log in, your username displays on the portal toolbar, and the JLV portal pages are displayed. The JLV portal pages are:

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

3.1.1. Default View

Upon log in, you see the  **Provider Portal**. The portal displays the  **Patient Search** dialog box by default.



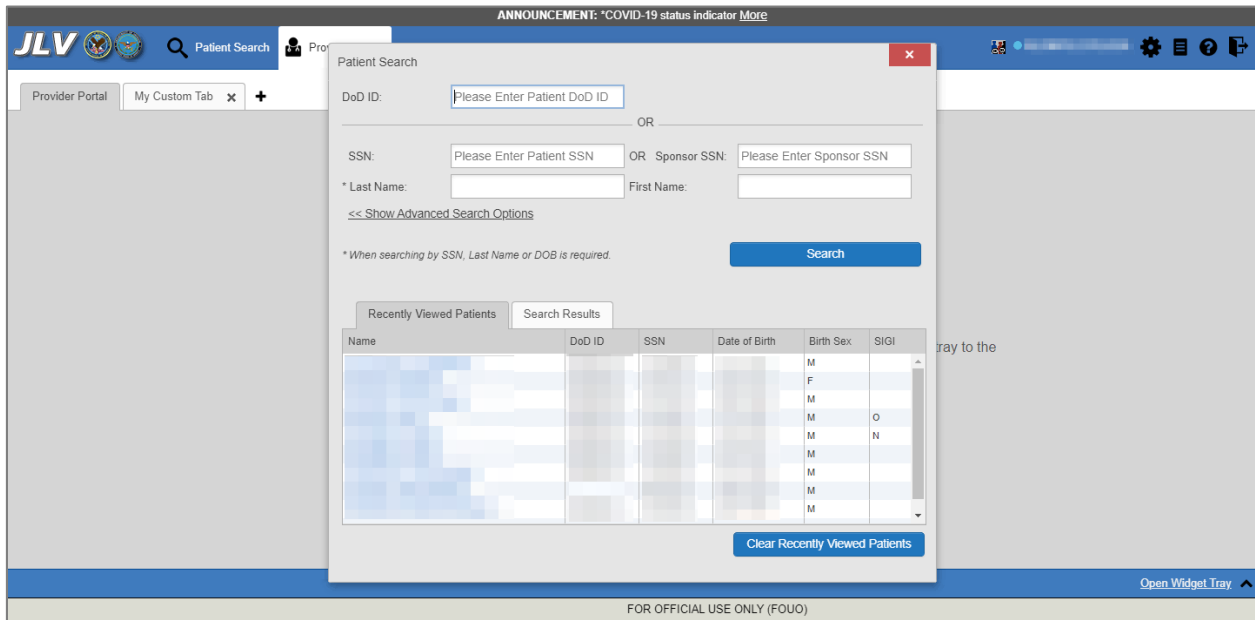




 **NOTE:** CPRS users who select a patient within CPRS, then launch JLV are taken directly to the JLV  **Patient Portal**, where the records for the patient selected in CPRS are displayed.

Figure 9: Default View



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

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**, **Outpatient Medications**, 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:





- **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 Pages



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






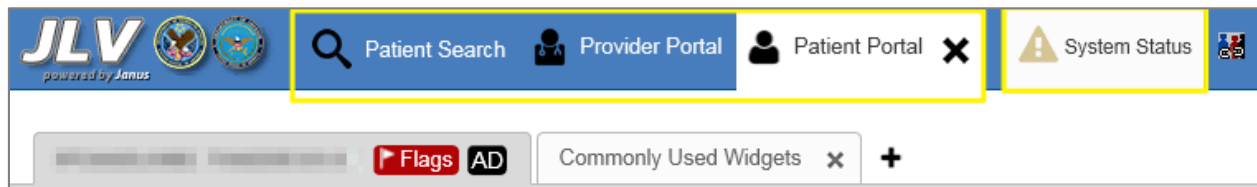

- Perform a  **Patient Search**
- Switch between the  **Patient Portal** and the  **Provider Portal**
- View the system status 
- View Context Management status 
- Open the widget tray using the **Open Widget Tray** ^ link on the portal pages (as shown in [Accessing and Opening Widgets](#),
- [Figure 39](#))

Figure 11: More JLV Functionality



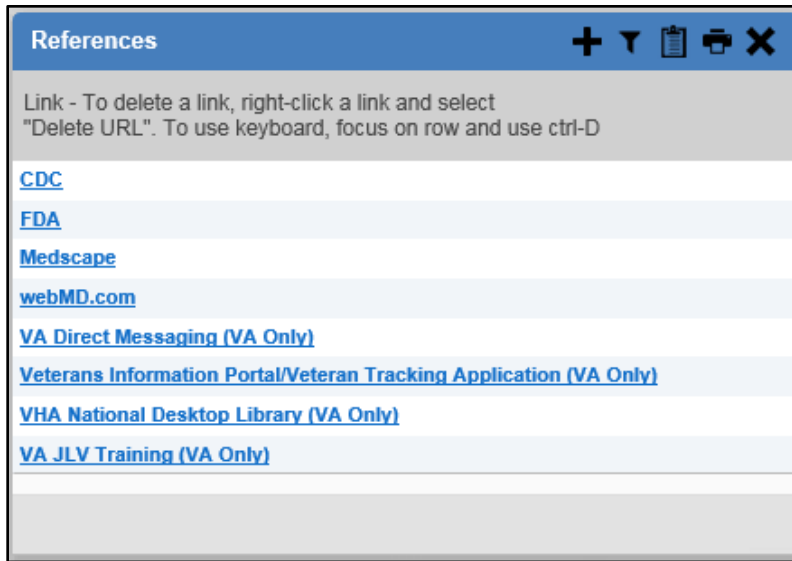
Switching from the  **Patient Portal** to the  **Provider Portal** closes all associated patient tabs and windows to prevent confusion between patient records.

3.1.3. References Widget

The **References** widget ([Figure 12](#)) displays hyperlinked references to online resources. Click the **Open Widget Tray** link (or click the up arrow) on the  **Provider Portal** to view the widget tray. Click and drag the **References** widget from the tray up to the portal and position where desired. Click a reference link to access the associated website. Click **+** to add a new reference link.

Only the reference links you add can be deleted. Right-click the link and select **Delete URL** to delete a reference link. You cannot delete reference links included in the default widget configuration.

Figure 12: References Widget






3.1.4. Viewing System Status

The system status reports the condition of the JLV application. Hovering over **System Status** provides additional information.

i **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 13](#) shows a system status message on the **Login** page, and [Figure 14](#) shows the **System Status** hover text on the portal toolbar.

Table 2: System Status Notices by Service

| Service | Notice |
|---------------------------|---|
| jMeadows | <i>“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.”</i> |
| Master Person Index (MPI) | <i>“VA Patient Identity Service is unavailable. Patient search may not be available, and VA and community partner data may not display.”</i> |

| Service | Notice |
|---|--|
| 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 data, and all DOD and Community Partner data, are currently unavailable. The source connection is down and all 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 13: System Status on the JLV Login Page

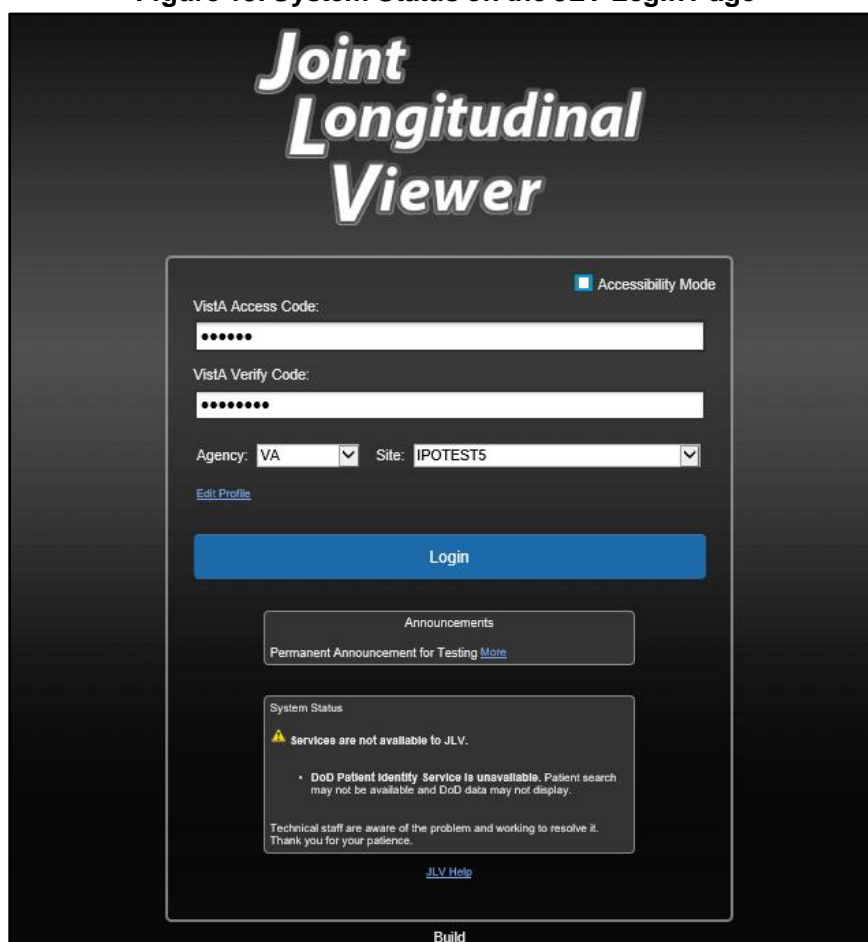
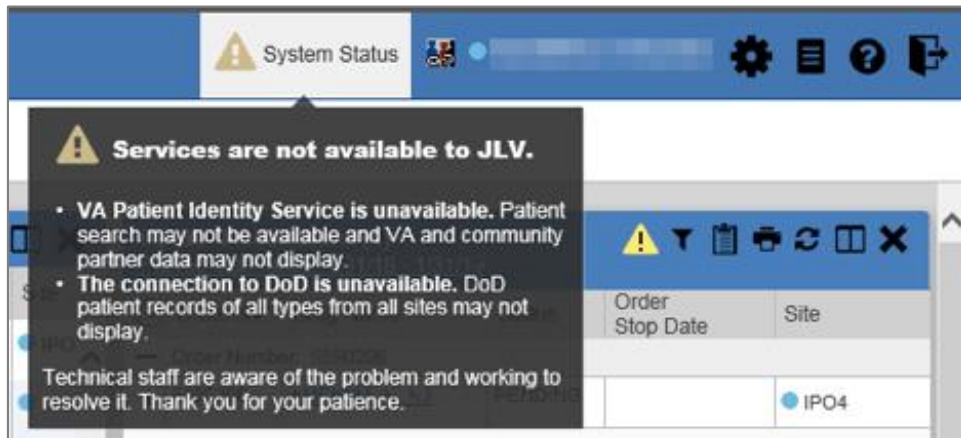




Figure 14: System Status on the JLV Toolbar



3.1.5. 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 15](#) shows the context indicator location on a JLV portal page. Context is suspended in this example.

Figure 15: Context Indicator



3.1.5.1. 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 16](#))
3. Click **Yes** to continue


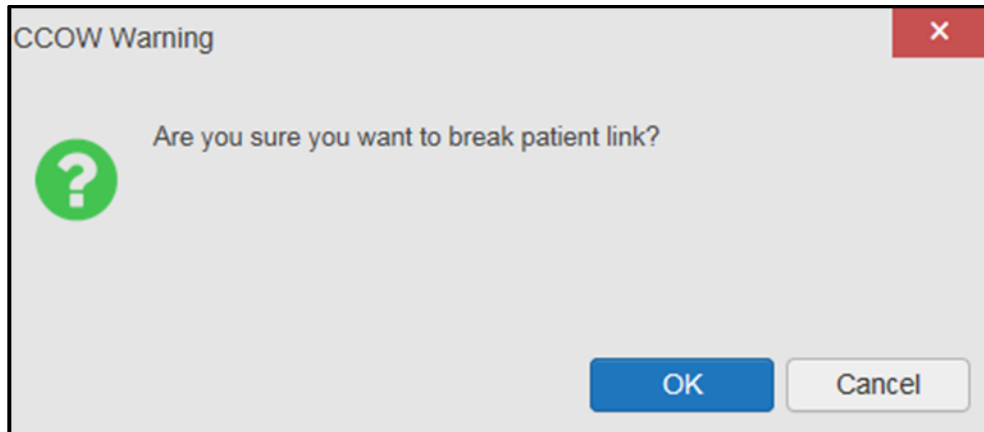

Once context is suspended,  displays on the portal pages. When context is suspended, patient changes are not reflected in either JLV or other CCOW-enabled applications.

Figure 16: Suspending Context



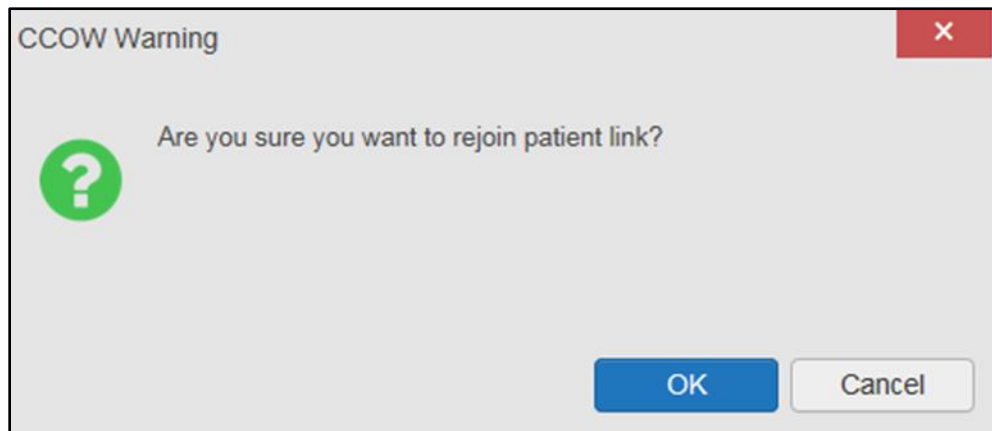
3.1.5.2. Establishing Context

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 17](#))
3. Click **Yes**

Once context is established,  displays on the portal pages.

Figure 17: CCOW Warning Message



3.1.5.3. Unable to Communicate with Vault


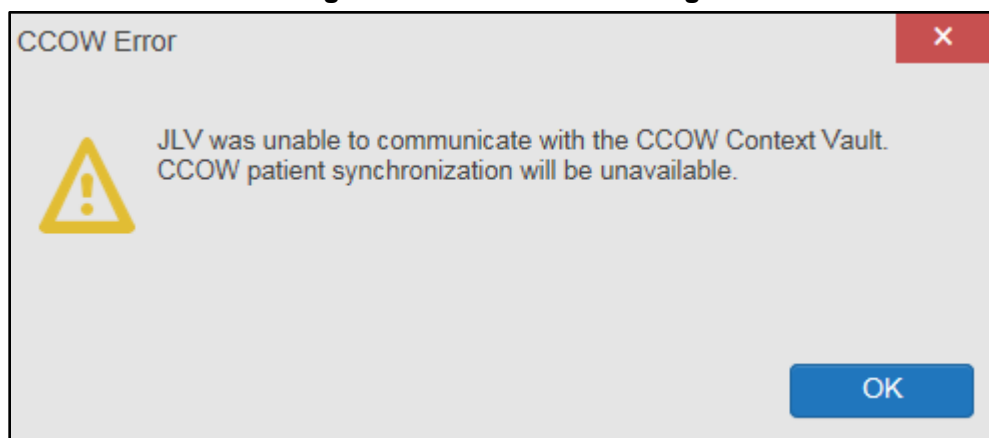
If JLV is unable to initiate context management upon log in, you see the CCOW Error message ([Figure 18](#)). Click **OK** to continue.  displays on the portal pages. If the CCOW error persists, contact your local service desk for assistance.

Figure 18: CCOW Error Message



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

3.1.5.4. Context Synchronization Failure


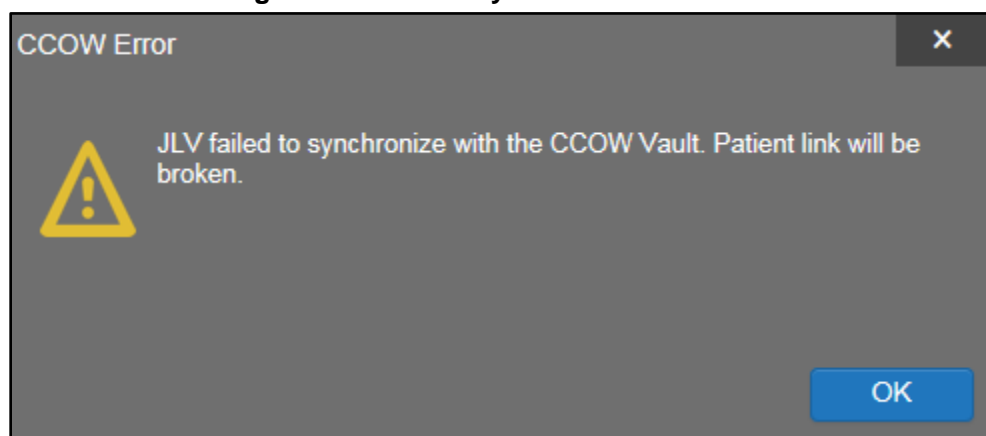

A CCOW error message is presented if JLV is unable to reestablish context ([Figure 19](#)). This indicates context is suspended. Click **OK** to continue.  displays on the portal pages. CAPRI-Claims users may encounter this error message at each log in, as there are usually no CCOW system components installed on their computers.

Figure 19: Context Synchronization Failure



3.2. Customizing JLV

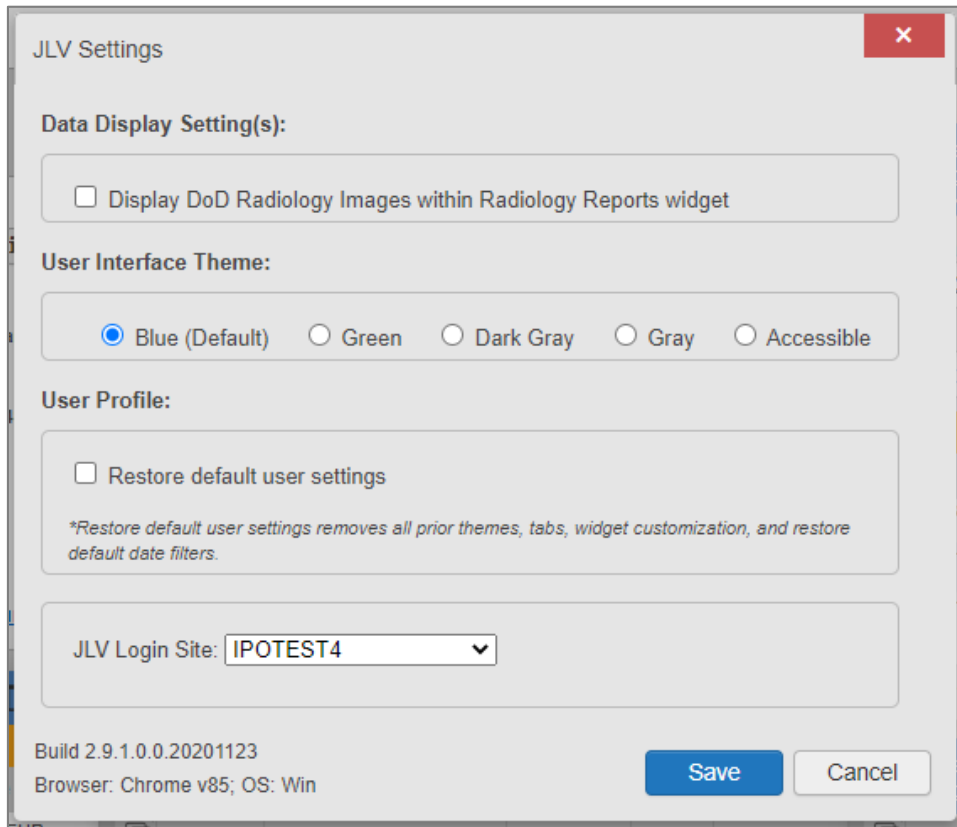
Configuration options can be set in the **JLV Settings** dialog ([Figure 20](#)). These settings are saved to your user profile and persist.

1. Click the  link on the **portal** page ([Figure 10](#))
 - a. The **JLV Settings** dialog box opens (all selections are optional)

2. Select the data display setting checkbox for DOD Radiology Images to display within the Radiology Reports Widget
3. Select the radio button to change the color theme
4. To restore your user profile default settings, click the checkbox
5. To change your JLV Login Site, select from the dropdown list (VA sites only)
6. Click **Save** to apply the selected data display setting and/or theme **OR**
7. 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 20: JLV Settings Dialog Box



i **NOTE:** Changing the data display setting or UI theme will require you to reselect and reload the current patient.

i **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; 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 21](#)). 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 XXX = the three-letter VistA site abbreviation | CPRS/VistA system data | VA: location Examples: <ul style="list-style-type: none"> VA: Walla Walla, WA VA: Central Texas HCS¹ | 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 Examples: <ul style="list-style-type: none"> CDR: Fairchild AFB⁶ AHLTA: JB⁷ 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 Examples: <ul style="list-style-type: none"> FEHR: Spokane, WA FEHR: Madigan AMC⁸ | 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. |

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

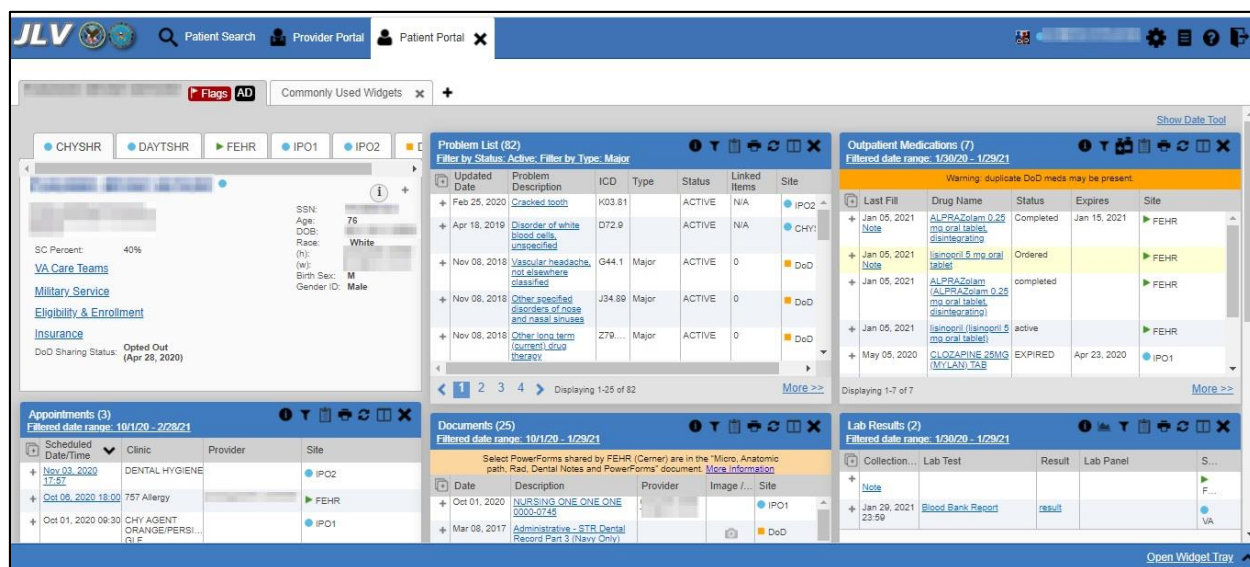
⁸ Army Medical Center

| Icon | Sources | Hover information | Data Supplied |
|---|---|---|--|
|  Name 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 Examples: <ul style="list-style-type: none"> Federal HIE: UC¹¹ San Diego 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).

Figure 21: Blue (Default) UI Theme¹²



⁹ Virtual Lifetime Electronic Record

¹⁰ Health Information Exchange

¹¹ University of California

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

Figure 22: Green UI Theme

The screenshot displays the JLV Patient Portal in a green-themed interface. At the top, there are navigation tabs for 'Patient Search', 'Provider Portal', and 'Patient Portal'. Below the navigation, there are several widget panels:

- Left Panel:** Patient profile information including SSN, Age (76), Race (White), Birth Sex (M), and Gender ID (Male). It also lists 'VA Care Teams', 'Military Service', 'Eligibility & Enrollment', and 'Insurance'.
- Problem List (82):** A table with columns: Updated Date, Problem Description, ICD, Type, Status, Linked Items, and Site. Entries include 'Cracked tooth' (Feb 25, 2020), 'Disorder of white blood cells, unspecified' (Apr 19, 2019), 'Vasular headache, not elsewhere classified' (Nov 08, 2018), and 'Other specified disorders of nose and nasal sinuses' (Nov 08, 2018).
- Outpatient Medications (7):** A table with columns: Last Fill, Drug Name, Status, Expires, and Site. Medications include ALPRAZOLAM 0.25 mg oral tablet, ISOPROPI 5 mg oral tablet, ALPRAZOLAM 0.25 mg oral tablet, and CLOZAPINE 25MG (MYLAN) TAB.
- Appointments (3):** A table with columns: Scheduled Date/Time, Clinic, Provider, and Site. Appointments are for 'DENTAL HYGIENE' (Nov 03, 2020), '757 Allergy' (Oct 08, 2020), and 'CHY AGENT ORANGE/PERSI... (Oct 01, 2020).
- Documents (25):** A list of documents including 'NURSING ONE ONE ONE 0000-9745' (Oct 01, 2020) and 'Administrative - STR Dental Record Part 3 (Navy Only) 128' (Mar 08, 2017).
- Lab Results (2):** A table with columns: Collection, Lab Test, Result, Lab Panel, and Site. Results include 'Blood Bank Report' (Jan 20, 2021).

Figure 23: Dark Gray UI Theme

The screenshot displays the JLV Patient Portal in a dark gray-themed interface. The layout is similar to Figure 22, but with a darker color palette:

- Left Panel:** Shows 'Patient demographics retrieval in progress...' with a loading spinner.
- Problem List:** Similar to Figure 22, but with a dark background and light text.
- Outpatient Medications:** Includes a date range selector (Start date: 1/30/2020, End date: 01/29/2021) and a warning: 'Warning: duplicate DoD meds may be present.' Below is a table with columns: Last Fill, Drug Name, Status, Expires, and Site.
- Appointments:** Similar to Figure 22, with a dark background.
- Documents:** Similar to Figure 22, with a dark background.
- Lab Results:** Similar to Figure 22, with a dark background.

Figure 24: Gray UI Theme

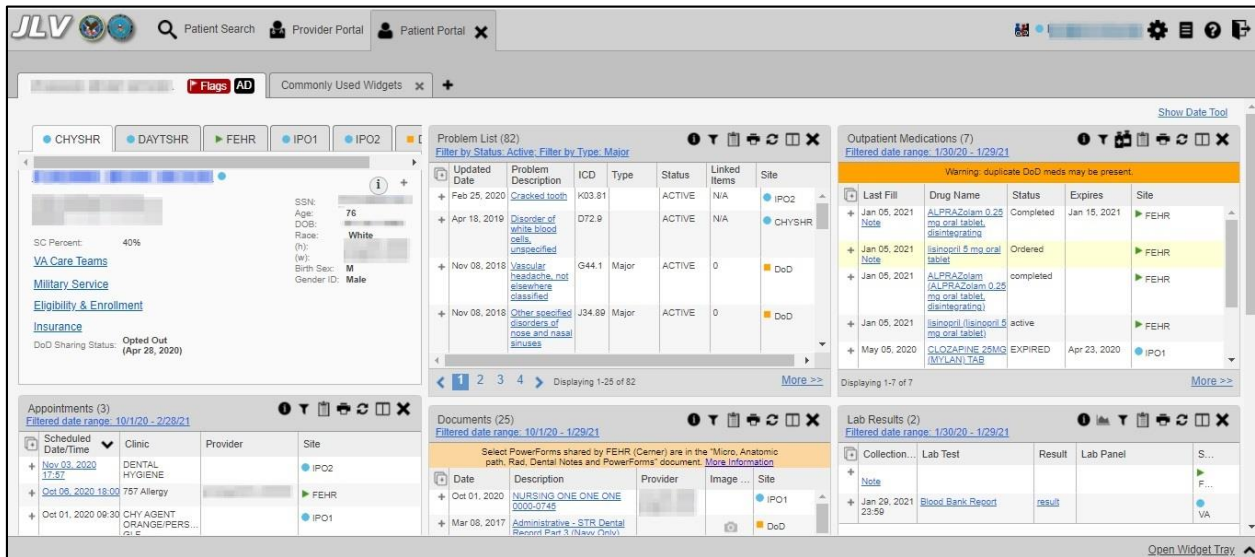
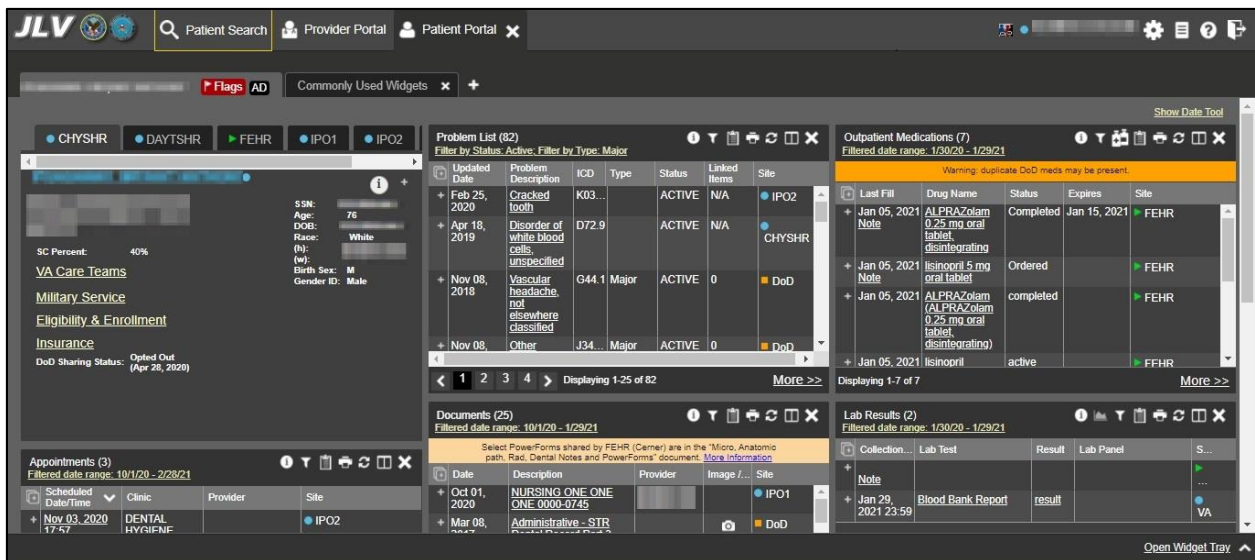


Figure 25: Accessible (Section 508-Compliant) UI Theme



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.

i **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. The item in focus is outlined in gold as a visual indicator of the element, field, or control with keyboard focus that receives information typed on the keyboard.

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

Pressing **Enter** or the **Spacebar** when an element that provides action is in keyboard focus performs the associated action; for example, pressing **Enter** or the **Spacebar** when the  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.

[Table 4](#) provides a complete list of accessible keystrokes.

Table 4: Accessible Theme Keyboard Shortcuts

| Keystroke | Description |
|--|--|
| Portal & Widget Navigation | |
| ALT + 4 | Press to transfer keyboard focus to the main or top screen element 1) Focus transfers to  Patient Search or the patient tab in the Demographics widget on a portal page 2) Focus transfers to the More>> link in a widget 3) Focus transfers to  in a dialog box |
| ENTER | Press to initiate the action associated with the item in focus. |
| TAB | Press to transfer keyboard focus to other user interface items. |
| ESC | Press to return keyboard focus to the panel containing the user interface item with keyboard focus or to exit a window, widget, or tab. |
| SPACEBAR | Press to activate any user interface item (for example, click a button). |
| Arrow Keys | When focused on a widget, press the arrow keys to change page viewing in a widget's data table. When focused on a dropdown list, press the down arrow key to view list contents. |
| Ctrl + d | Place keyboard focus on a reference or row within the References widget on the  Provider Portal and press Ctrl + d to remove the reference URL. Removing a default reference is not allowed. |
| Ctrl + f | Use standard browser find functionality to search text in the active window. |
| Portal Tabs | |
| Arrow Keys | Use the left and right arrow keys to change tab panels. |
| TAB | 1) Press Tab until  is in focus 2) Press Enter 3) The new tab dialog box opens and prompts you to enter a name for the new tab 4) Tab to the Add button to confirm the new tab name or tab to the Cancel button to discard the new tab |
| Windows or Dialog Boxes | |
| TAB | Press to transfer keyboard focus to other user interface items within the window or dialog box. |
| Adding Widgets to a Portal Page | |
| Number position | Add a widget to a portal page from the widget tray: 1) Determine in which column (1, 2, or 3) to place the widget 2) Focus on the desired widget icon in the widget tray 3) Press Alt + 1, 2, or 3 , depending on the column chosen |

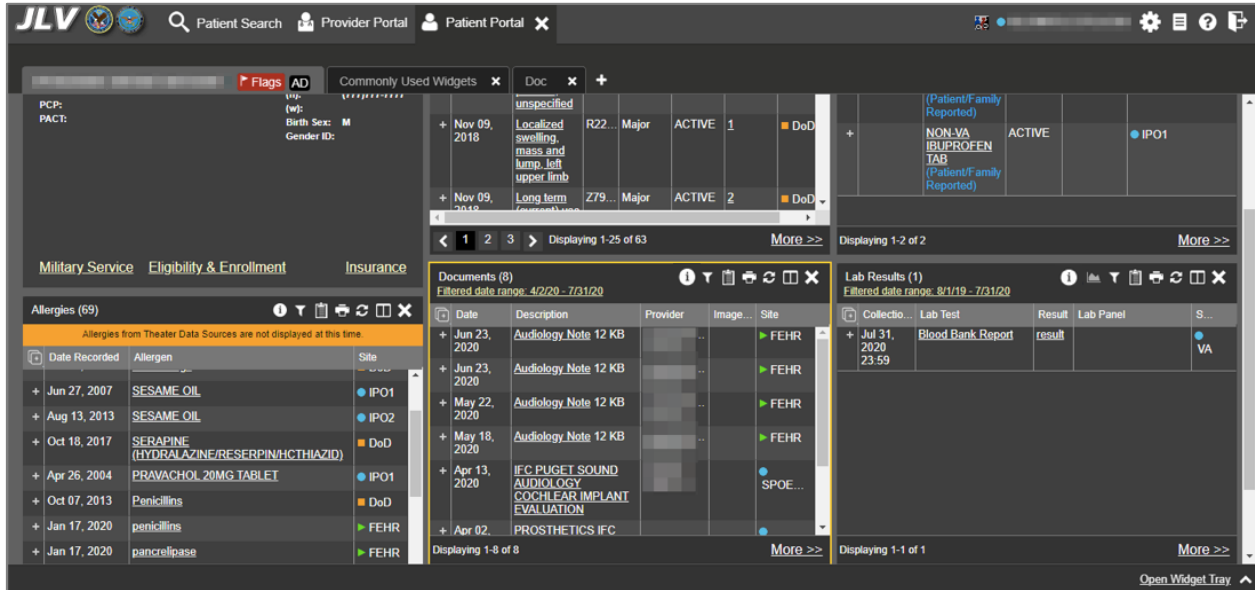
3.2.3.2. Accessible Theme Portal Navigation

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

[Figure 26](#) depicts the **Documents** widget with keyboard focus. Focus can be changed by pressing the **Tab** key. Pressing the **Tab** key in this example shifts the keyboard focus from the **Documents** widget to the widget immediately below the **Documents** widget. Pressing the **Tab** key again shifts the keyboard focus to the widget at the top of the next column.

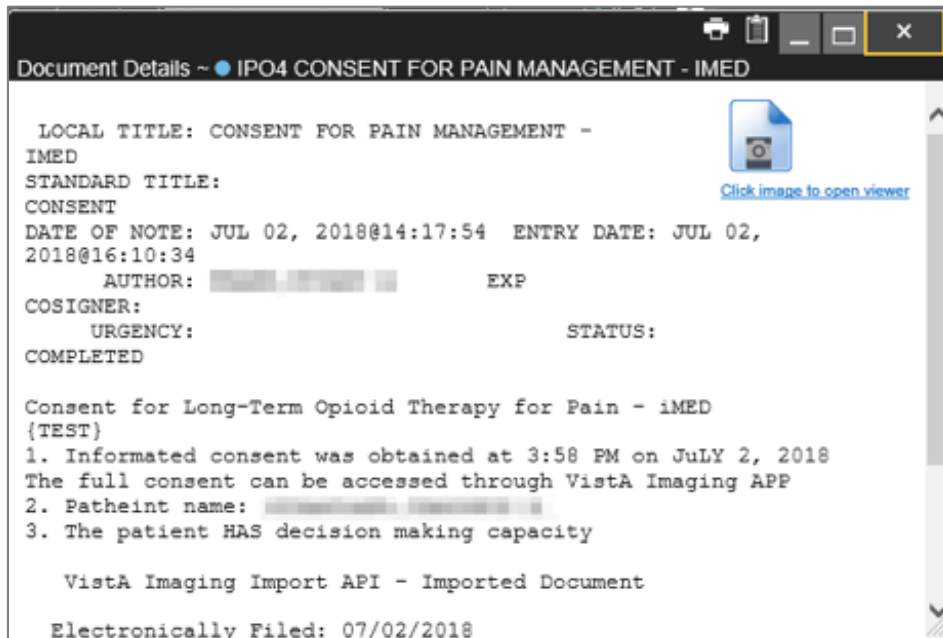
i **NOTE:** Focus on the element within the widget that has hover text. After a small delay, the text appears as if you hovered over the element with your mouse cursor.

Figure 26: Navigation Using Elements with Keyboard Focus



The **Document** details window has keyboard focus in [Figure 27](#). Move through the toolbar buttons by using the arrow keys, or by pressing **Tab**. Move to **X** and press **Enter** to close the details window. After closing the window, keyboard focus returns to the last element that had keyboard focus prior to opening the window.

Figure 27: Document Details with Keyboard Focus



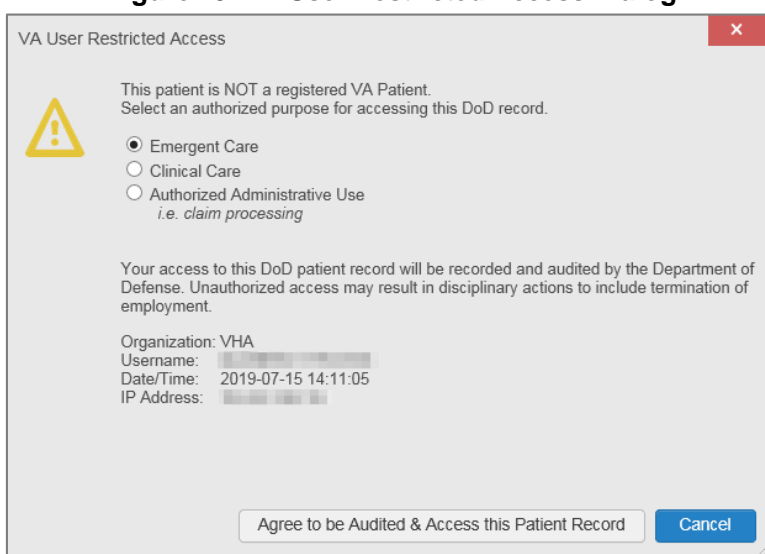
3.3. User-Restricted Access to Patient Data

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 28](#)).

Once the purpose for access is selected, clicking **Agree to be Audited & Access this Patient Record** ([Figure 28](#)), 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 28: VA User Restricted Access Dialog



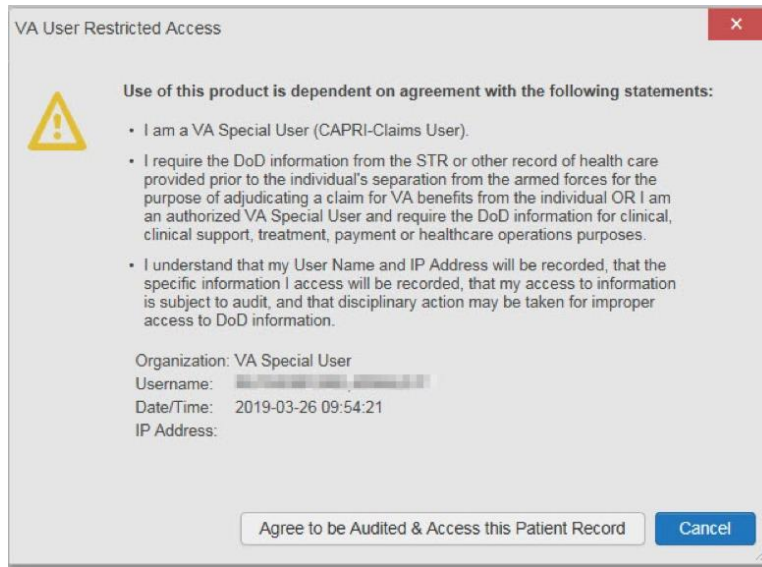
3.3.2. CAPRI-Claims Users Viewing Patients with DOD Data

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 29](#)) if the patient they selected is registered in MPI. After agreeing to the audit, the CAPRI-Claims user can access the patient's record.

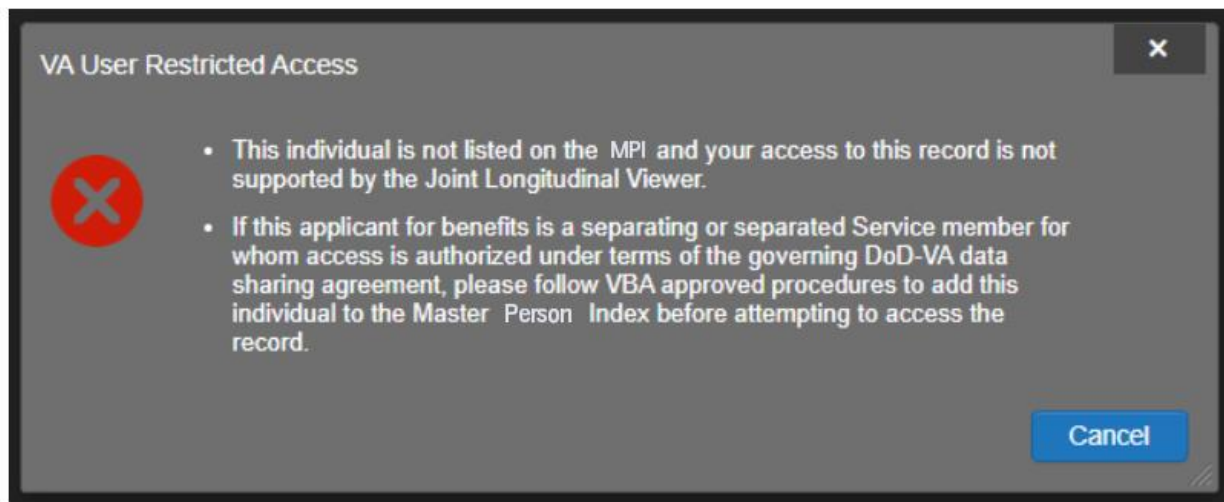
Figure 29: CAPRI-Claims User Audit Notification



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 30](#)) if the selected patient is not registered in MPI. Clicking **Cancel** returns the user to the previous screen.

Figure 30: Restricted Access Notification



3.3.3. Access to DOD Sensitive Records

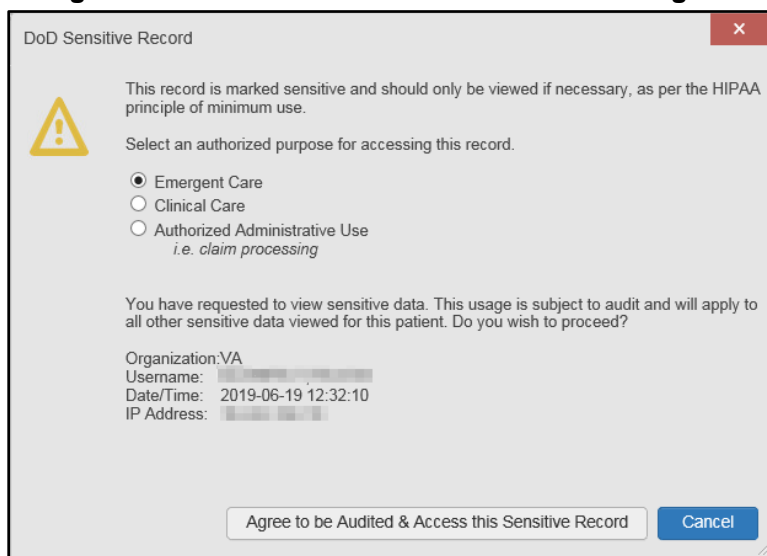
All JLV users are audited each time a sensitive DOD record is accessed. Auditing applies to sensitive documents, lab results, outpatient encounters, or progress notes records. JLV records the user's name, organization, SSN/EDIPI (for DOD users), PIV (for VA users), location, patient identifiers (patient 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 31](#).

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 31: 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 32](#))

Figure 32: DOD ID (EDIPI) Search¹³

Patient Search

DoD ID:

OR

SSN: OR Sponsor SSN:


* Last Name: First Name:

[<< Show Advanced Search Options](#)


* When searching by SSN, Last Name or DOB is required.

Recently Viewed Patients | Search Results

| Name | SSN | Date of Birth | Birth Sex | SIGI |
|------|-----|---------------|-----------|------|
| | | | M | O |

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

3.4.4. Patient Search Using SSN

1. Click  **Patient Search**
 - a. The **Patient Search** dialog box opens
2. Enter the patient's full, nine-digit SSN in the **SSN** field ([Figure 33](#))
 - a. When searching by SSN, either the last name or the DOB *must* be entered to perform the search

¹³ Self-Identified Gender Identity (SIGI)

Figure 33: SSN Search

Patient Search

DoD ID:

OR

SSN:

OR Sponsor SSN:

* Last Name:

First Name:

[<< Show Advanced Search Options](#)

** When searching by SSN, Last Name or DOB is required.*

Recently Viewed Patients | Search Results


| Name | SSN | Date of Birth | Birth Sex | SIGI |
|------|-----|---------------|-----------|------|
| | | | M | N |

3. Click **Search**


- a. If the required patient identifiers are not provided, hover text appears, indicating the information necessary to complete the patient search
- b. If a match of patient names cannot be made, enter additional identifiers (first name, DOB) to refine the search ([Figure 34](#))

Figure 34: Additional Identifiers Needed

Patient Search

 Patient not found with search elements entered, please provide additional patient identifying information and search again

4. 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

3.4.5. 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.


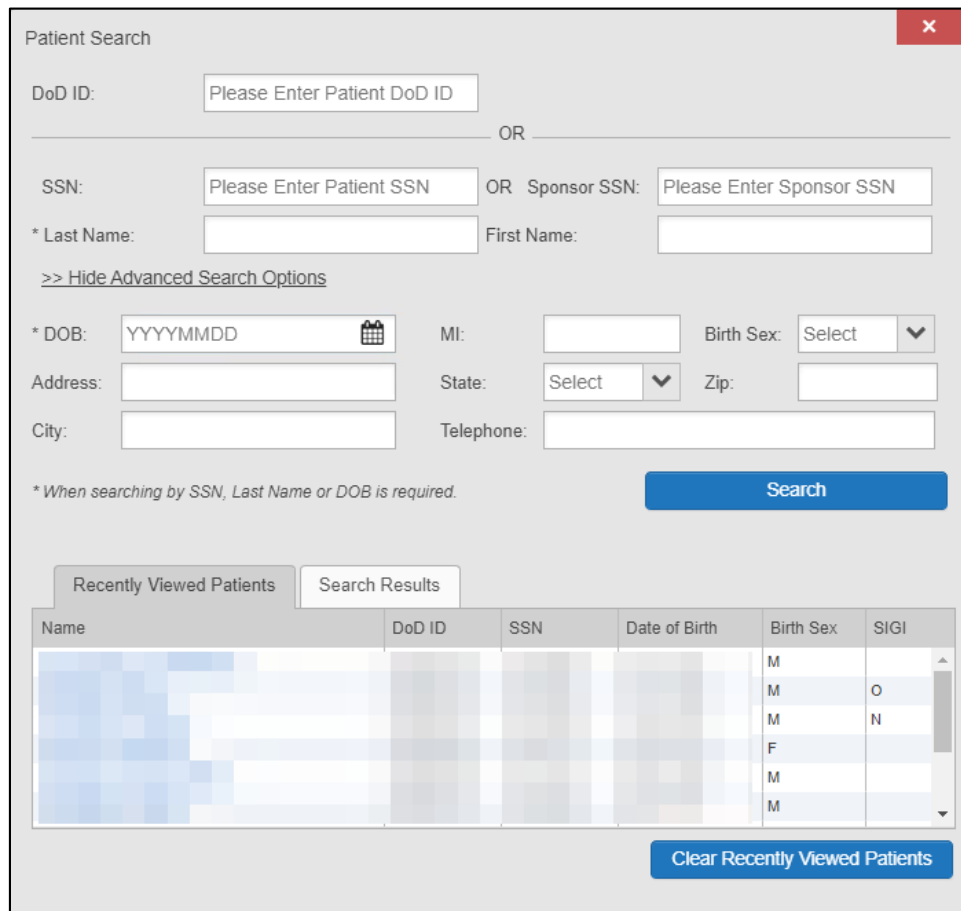



1. Click  **Patient Search**
 - a. The **Patient Search** dialog box opens
2. Click the [<<Show Advanced Search Options](#) link under the ***Last Name** field (seen in [Figure 33](#))
3. Enter the patient identifiers in the appropriate search fields, as desired
 - a. Advanced search option fields include ***DOB, MI, Birth Sex, Address, State, City, Zip,** and **Telephone** (seen in [Figure 35](#))

Figure 35: Advanced Search Options




The screenshot shows a 'Patient Search' dialog box with a close button (X) in the top right corner. The search criteria section includes:

- DoD ID:
- OR
- SSN: OR Sponsor SSN:
- * Last Name: First Name:
- >> Hide Advanced Search Options
- * DOB:  MI: Birth Sex: 
- Address: State:  Zip:
- City: Telephone:

A blue 'Search' button is located at the bottom right of the search criteria section. Below it, a note reads: ** When searching by SSN, Last Name or DOB is required.*

At the bottom of the dialog, there are two tabs: 'Recently Viewed Patients' and 'Search Results'. The 'Search Results' tab is active, displaying a table with the following columns: Name, DoD ID, SSN, Date of Birth, Birth Sex, and SIGI. The table contains several rows of data, with the first row showing 'M' for Birth Sex and an empty SIGI field. A blue 'Clear Recently Viewed Patients' button is located at the bottom right of the dialog.

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 36](#))
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 36](#))

Figure 36: Sponsor SSN Search

The screenshot shows a 'Patient Search' window with a red close button in the top right corner. The search criteria section includes:

- DoD ID:
- OR
- SSN: OR Sponsor SSN:
- * Last Name: First Name:
- << [Show Advanced Search Options](#)
- * When searching by SSN, Last Name or DOB is required.
-

Below the search criteria are two tabs: 'Recently Viewed Patients' and 'Search Results'. The 'Search Results' tab is active and displays a table with the following data:

| Name | SSN | Date of Birth | Birth Sex | SIGI |
|------------|------------|---------------|-----------|------|
| [REDACTED] | [REDACTED] | [REDACTED] | F | |

At the bottom right of the window is a


4. Click a name in the **Search Results** list
 - a. The **Family Members** dialog opens ([Figure 37](#))
 - 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 37: Family Members Dialog Box

| Name | DoD ID | SSN | Date of Birth | Birth Sex | SIGI |
|------------|------------|------------|---------------|-----------|------|
| [Redacted] | [Redacted] | [Redacted] | [Redacted] | M | |
| [Redacted] | [Redacted] | [Redacted] | [Redacted] | M | |

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.

i **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 38](#))
 - 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 38: Recently Viewed Patients List

The screenshot shows a 'Patient Search' window with a search form and a table of results. The search form includes fields for DoD ID, SSN, Sponsor SSN, Last Name, and First Name, along with a 'Search' button. Below the search form is a note: '* When searching by SSN, Last Name or DOB is required.' The table below has two tabs: 'Recently Viewed Patients' and 'Search Results'. The table has columns for Name, DoD ID, SSN, Date of Birth, Birth Sex, and SIGI. The table is currently displaying data from the 'Recently Viewed Patients' tab.

| Name | DoD ID | SSN | Date of Birth | Birth Sex | SIGI |
|-----------|-----------|-----------|---------------|-----------|------|
| [Blurred] | [Blurred] | [Blurred] | [Blurred] | M | |
| [Blurred] | [Blurred] | [Blurred] | [Blurred] | M | O |
| [Blurred] | [Blurred] | [Blurred] | [Blurred] | M | N |
| [Blurred] | [Blurred] | [Blurred] | [Blurred] | F | |
| [Blurred] | [Blurred] | [Blurred] | [Blurred] | M | |
| [Blurred] | [Blurred] | [Blurred] | [Blurred] | M | |
| [Blurred] | [Blurred] | [Blurred] | [Blurred] | M | |
| [Blurred] | [Blurred] | [Blurred] | [Blurred] | M | |
| [Blurred] | [Blurred] | [Blurred] | [Blurred] | M | |

4. Widgets

Widgets are elements on the JLV portal pages that display data specific to a clinical domain. By default, widgets are displayed in minimized view on the portal pages ([Figure 21](#)), but they can be expanded to view additional details. Available widgets are listed in and launched from the widget tray.

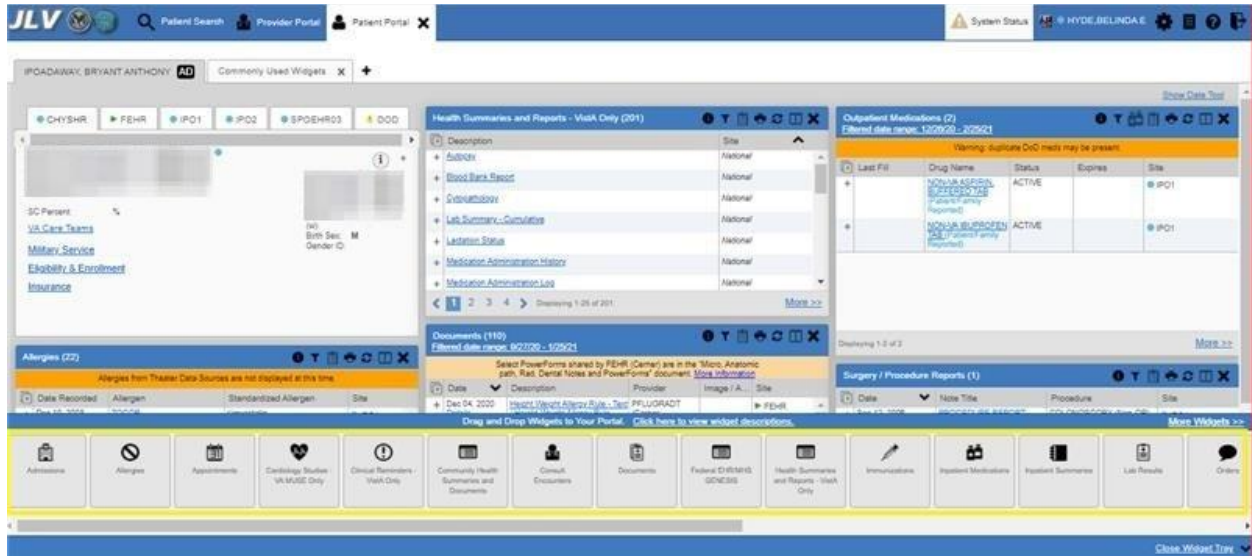
i **NOTE:** Widgets may take anywhere between 10 seconds to 90 seconds to load, depending on the date range settings.

4.1. Accessing and Opening Widgets

All available widgets display in the widget tray (

[Figure 39](#)). 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 39: 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




i **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 **X**. 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 5](#).

Table 5: 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 |
|  | 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 |
| More >> | 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. 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  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 6](#) describes the functionality of each toolbar button.


Table 6: 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 . |

| 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. 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. |
|  | 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. 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 Outpatient Medications widget. NOTE: Copy Active Rx is disabled when a date range filter is set to less than 120 days. |

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—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 **More >>** 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. 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
 - 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 **Apply**

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 1](#) lists available filters and their corresponding widgets.

Table 7: Available Widget Filters

| Filter By | Widgets |
|--|---|
| Site | Admissions, Allergies, Appointments, Consult Encounters, Documents, Health Summaries and Reports, Inpatient Medications, Inpatient Summaries, Lab Results, Orders, Outpatient Encounters, Outpatient Medications, Problem List, Procedures, Progress Notes, Questionnaires and Deployment Assessments, Radiology Reports, Surgery/Procedure Reports, Vitals |
| Site (Reporting) | Immunizations |
| Provider | Inpatient Summaries, Progress Notes, Surgery/Procedure Reports |
| Provider Specialty | Appointments, Consult Encounters, Documents, Inpatient Summaries, Orders, Outpatient Encounters, Procedures, Progress Notes |
| Clinic | Appointments, Outpatient Encounters |
| Consult Order | Consult Encounters |
| Description | Documents |
| Problem Description | Problem List |
| Standardized Description | Documents, Problem List |
| Location | Documents ¹⁴ , Inpatient Summaries |
| Source System | Documents |
| Vaccine Administered Product Type | Immunizations |

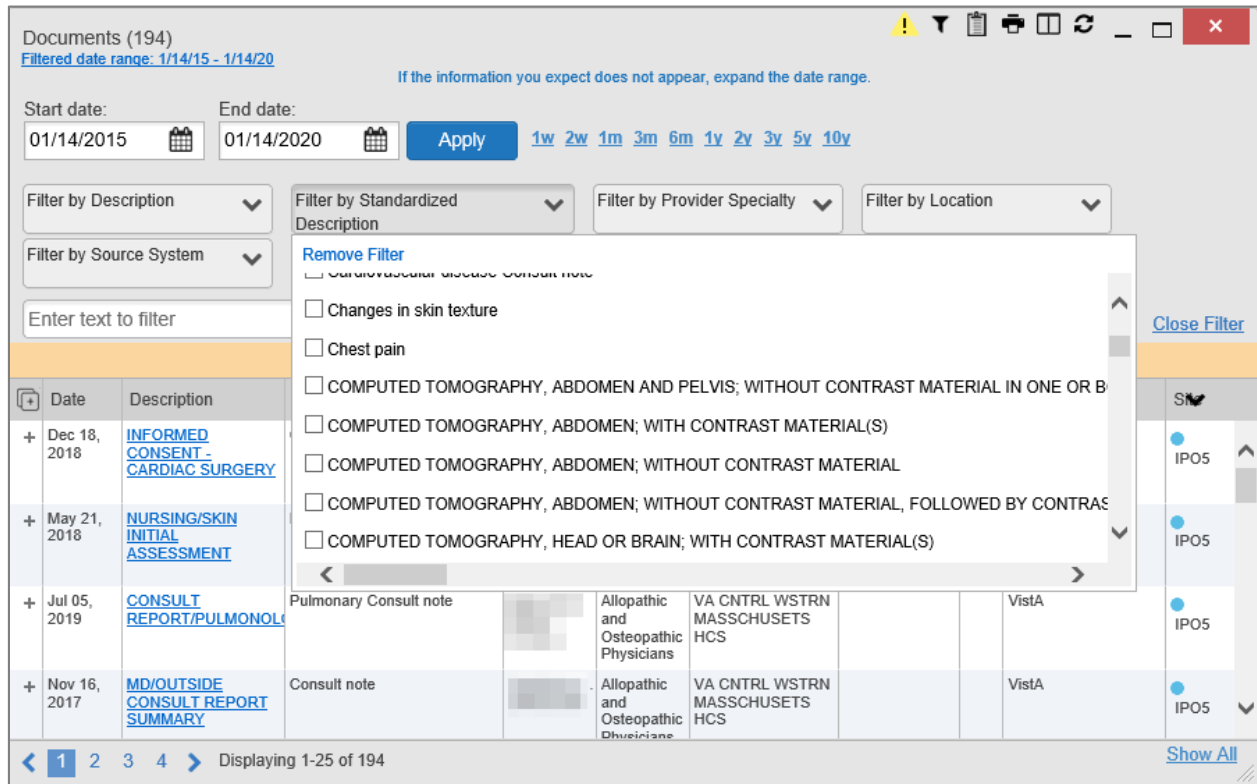
¹⁴ Only available in expanded view

| Filter By | Widgets |
|--|--|
| Standardized Vaccine Product Type | Immunizations |
| Drug Name | Inpatient Medications, Outpatient Medications |
| Standardized Drug Name | Inpatient Medications, Outpatient Medications |
| Ordering Health Care Provider (HCP) Specialty | Inpatient Medications, Outpatient Medications |
| Note Type | 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 40](#)).

¹⁵ Filter applies to DOD data only

Figure 40: Dynamically Expanded Filter Dropdown in the Documents 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 41](#)).



Figure 41: Date Range Filters Applied

The screenshot displays four data widgets, each with a date range filter applied to its data. The filters are: 7/31/18 - 7/31/20 for Appointments, 7/31/15 - 7/31/20 for Consult Encounters, 7/31/17 - 7/31/20 for Vitals, and 7/31/17 - 7/31/20 for Immunizations. Each widget includes a 'More >>' link at the bottom right.

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, 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 **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).

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

[Figure 42](#) highlights the **Quick Date Range** filter options in the expanded view of the **Documents** widget.

Figure 42: Quick Date Range Filter Options

Documents (168)
 Filtered date range: 1/14/15 - 1/14/20
 If the information you expect does not appear, expand the date range.

Start date: 01/14/2015 End date: 01/14/2020 Apply **1w 2w 1m 3m 6m 1y 2y 3y 5y 10y**

Filter by Description Filter by Standardized Description Filter by Provider Specialty Filter by Location
 Filter by Source System Filter by Site


Enter text to filter Remove All Filters Close Filter

Documents- this is a banner announcement for this widget.

| Date | Description | Standardized Description | Provider | Provider... | Location | Status | Im... | Source System | Site |
|--------------|--|----------------------------|----------|--|-------------------|--------|-------|---------------|------|
| Jan 10, 2020 | Study Report, Patient Qualitative Exercise Stress Test | Exercise stress test study | | Allopathic & Osteopathic Physicians-Family Medicine- | 4th Medical Group | | | CDR | DoD |
| Aug 26, 2019 | DIABETIC PATIENT CONSULT REPORT | Diabetology Consult note | | Allopathic & Osteopathic Physicians | CHYSQA260 | | | VistA | IPO4 |
| Aug 19, 2019 | ADVANCE DIRECTIVE | | | | | | 📷 | VistA | IPO5 |
| Aug 19, 2019 | ADVANCE DIRECTIVE | | | | | | 📷 | VistA | IPO5 |
| Aug 16, 2019 | CONSULT | | | | | | 📷 | VistA | IPO5 |

Displaying 1-25 of 168 Show All

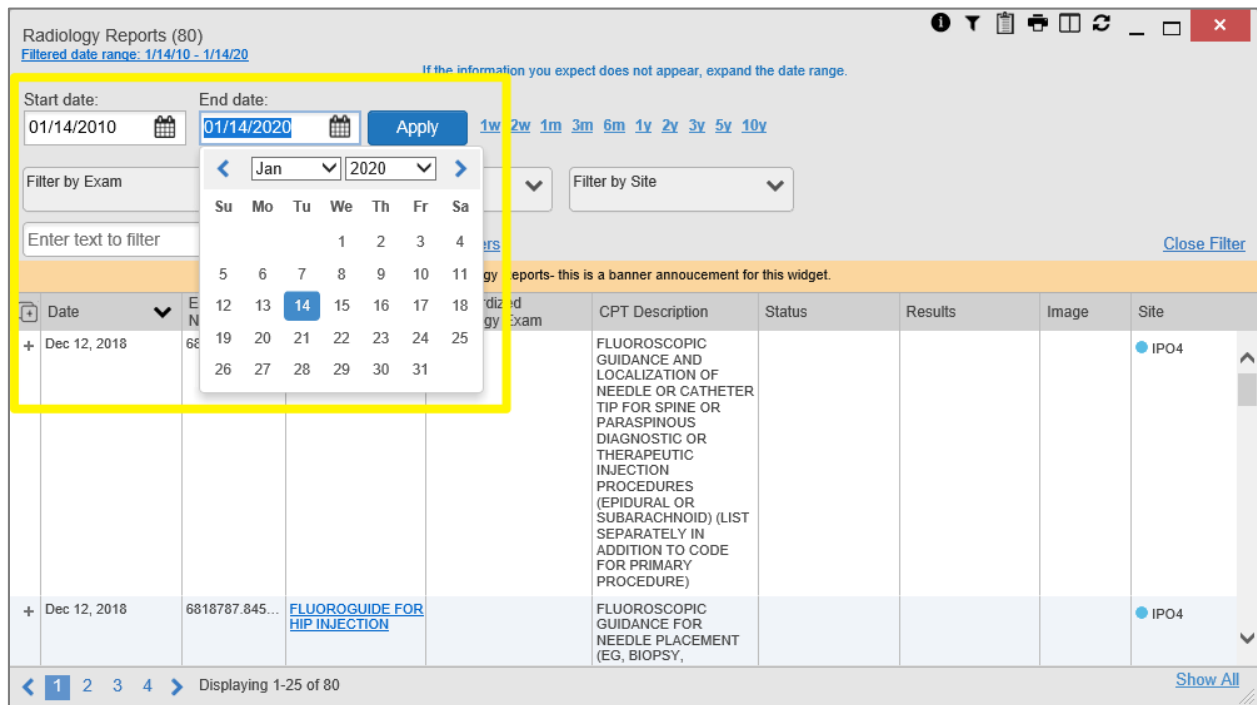
4.5.1.2. Start and End Date Filter



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


i **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 43](#) provides an example of the start and end date filter fields in the expanded view of the **Radiology Reports** widget.

Figure 43: 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

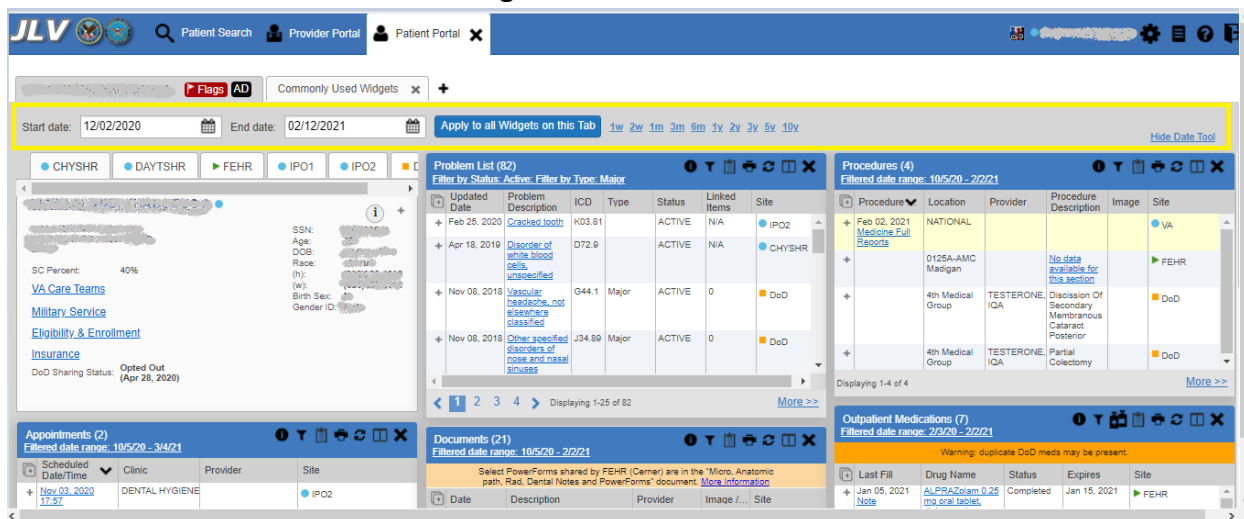
All tabs in the  **Patient Portal** have a **Tab Date** tool that you can use to filter all widgets on a single tab by the same date range. The **Tab Date** tool has the same **Start and End Date** and

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

Figure 44: Tab Date Tool

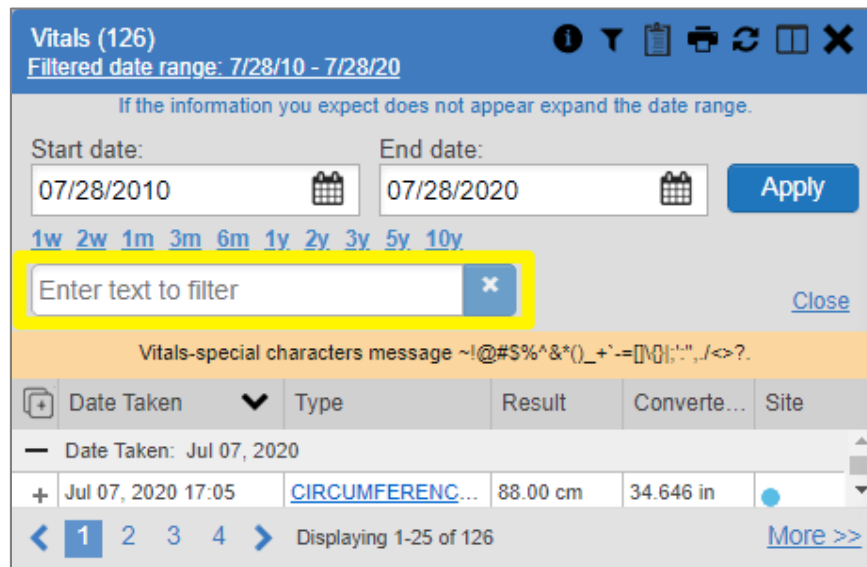




The **Tab Date** tool only filters widgets currently displayed on the active tab that support date range filtering. Widgets that display all data, without a date range, will continue to do so. Filtering only applies to widgets on the tab at the time you apply the **Tab Date** tool and will not affect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

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

Figure 45: Vitals Widget Text Filter



Click  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. Keep in mind:

- Text filtering applies only to one widget
- 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 shown in the expanded view of the widget even if the term is entered in the text filter field of the minimized view
- Text filters entered in the minimized view of a widget persist when you open the widget in expanded view
- On widgets with site tabs, text filters entered on one site tab persist when you select other site tabs
- All records across the widget pages are filtered if the widget has multiple page views
- The **Enter text to filter** field is not case sensitive and allows up to 25 characters, including numeric and special characters
- 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.

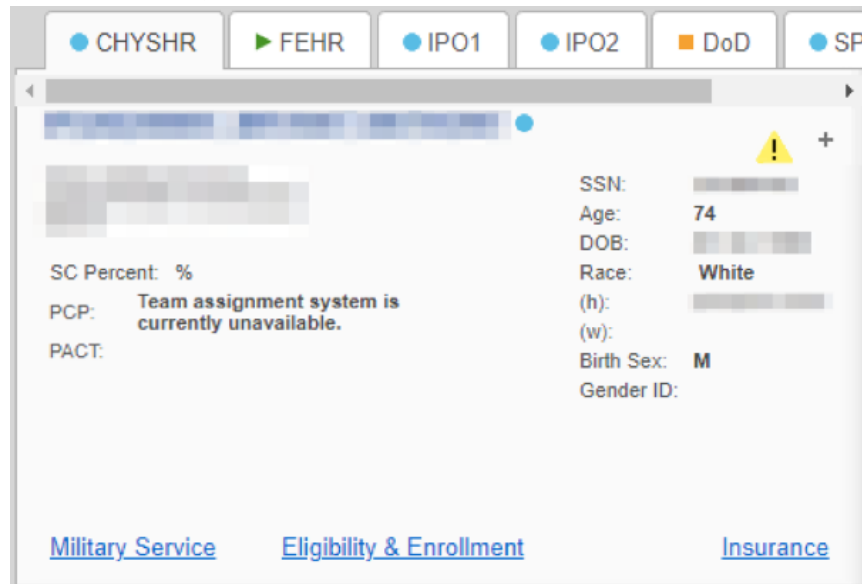
- i** **NOTE:** The Connection Status reports the condition of the connection between JLV and its external resources, while System Status reports the overall condition of the JLV application. See [Viewing System Status](#) for more information.

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:

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

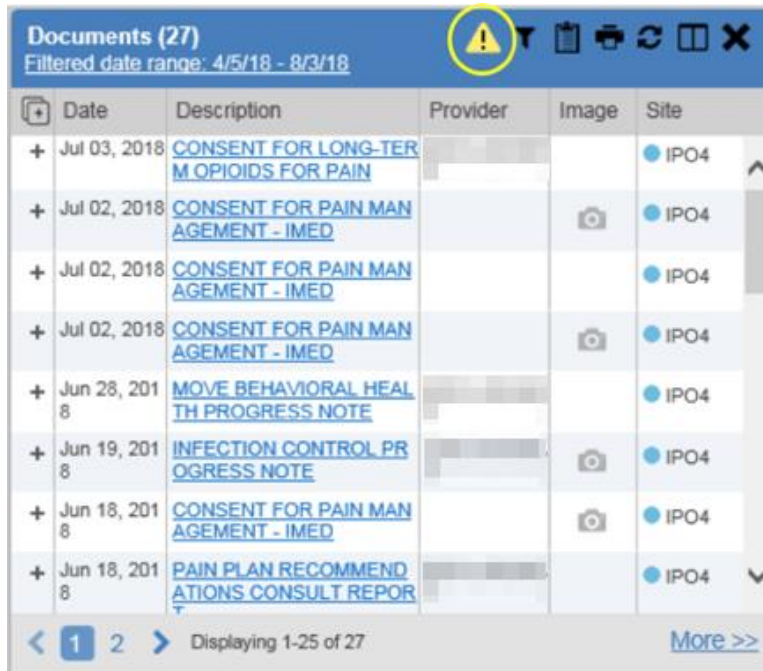
[Figure 46](#) shows **!** in the **Demographics** widget. When the Primary Care Management Module (PCMM) service is unavailable, the primary care fields in the **Demographics** widget display this error message: “*Team assignment system is currently unavailable.*”

Figure 46: Demographics Widget, PCMM Connection Status Unavailable



[Figure 47](#) shows a connection status indicator icon displayed on the **Documents** widget toolbar.

Figure 47: Connection Status Indicator



| Date | Description | Provider | Image | Site |
|--------------|--|----------|-------|--------|
| Jul 03, 2018 | CONSENT FOR LONG-TERM OPIOIDS FOR PAIN | | | • IPO4 |
| Jul 02, 2018 | CONSENT FOR PAIN MANAGEMENT - IMED | | | • IPO4 |
| Jul 02, 2018 | CONSENT FOR PAIN MANAGEMENT - IMED | | | • IPO4 |
| Jul 02, 2018 | CONSENT FOR PAIN MANAGEMENT - IMED | | | • IPO4 |
| Jun 28, 2018 | MOVE BEHAVIORAL HEALTH PROGRESS NOTE | | | • IPO4 |
| Jun 19, 2018 | INFECTION CONTROL PROGRESS NOTE | | | • IPO4 |
| Jun 18, 2018 | CONSENT FOR PAIN MANAGEMENT - IMED | | | • IPO4 |
| Jun 18, 2018 | PAIN PLAN RECOMMENDATIONS CONSULT REPORT | | | • IPO4 |

Clicking a **Connection Status** indicator icon ([Figure 47](#)) opens a standalone window with information about the connection to data sources. Clicking the [< Hide All Active Interfaces](#) link ([Figure 48](#)) in the **Connection Status** window hides the detailed **All Active Connections** view and displays only the connection errors.

Figure 48: Connection Status Details

Connection Status for Documents

⚠ Connection Errors

Connections from the following sources are currently unavailable. Most connection errors resolve themselves within a few hours.

| Source | Name | Status | Data Domain |
|--------|------|-------------------------|------------------------|
| DOD | DOD | Connection unavailable. | FEHR Summary Documents |

[< Hide All Active Interfaces](#)

All Active Connections

Connections to the source systems are successful. Successful status connections are not an indicator that clinical data is being returned to the widget from the source system.

| Source | Name | Status | Data Domain |
|--------|---------------|---------|-------------------|
| DOD | TMDS | SUCCESS | Progress Note |
| DOD | CDR | SUCCESS | Progress Note |
| DOD | CDR | SUCCESS | Encounters |
| DOD | DOD | SUCCESS | Inpatient Note |
| DOD | CHCS: SEYMOUR | SUCCESS | Discharge Summary |

Clicking the [> Show All Active Interfaces](#) link in the **Connection Status** window ([Figure 49](#)) opens a **Connection Status Details** view ([Figure 48](#)).

Figure 49: Connection Status Window

Connection Status for Documents

⚠ Connection Errors

Connections from the following sources are currently unavailable. Most connection errors resolve themselves within a few hours.

| Source | Name | Status | Data Domain |
|--------|------|-------------------------|------------------------|
| DOD | DOD | Connection unavailable. | FEHR Summary Documents |

[> Show All Active Interfaces](#)

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 50](#))
 - a. The **Add Tab** dialog box opens ([Figure 51](#))

Figure 50: Add Custom Tab Icon

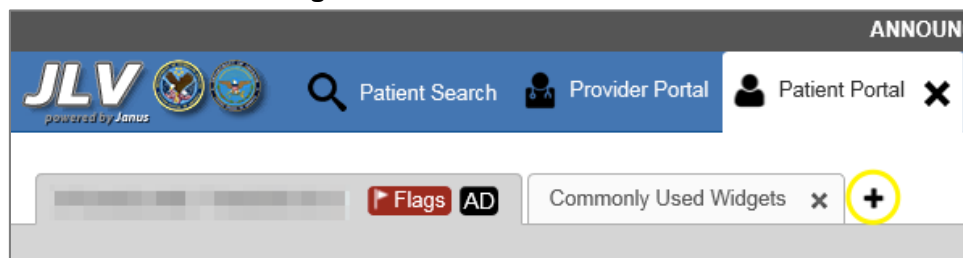



Figure 51: Add Tab Dialog Box

A screenshot of the 'Add Tab' dialog box. The dialog box has a title bar with the text 'Add Tab' and a red close button (X) in the top right corner. Inside the dialog, there is a label 'Tab Name:' followed by a text input field. At the bottom of the dialog, there are two buttons: a blue 'Add' button and a grey 'Cancel' button.

2. 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
3. Click, hold, and drag each of the desired widgets to the screen (max 12)
4. 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

i **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

Figure 52: 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 |
| 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, Lab Results, Orders, Progress Notes, Questionnaires and Deployment 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, Consult Encounters, Documents, Inpatient Medications, Inpatient Summaries, Orders, Outpatient Encounters, Outpatient Medications, Procedures, Progress Notes |
| RxNorm Standard | Standard names given to allergens, clinical drugs, and drug delivery devices in the United States | Allergies, Inpatient Medications, Orders, Outpatient Medications |
| SNOMED CT Standard | Core, general terminology used in electronic health records | Admissions, Outpatient Encounters, 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 [VistA Imaging SharePoint site](#) 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 53](#)) of the **Advanced Directives, Cardiology Studies—VA MUSE Only, Documents, Procedures, Progress Notes, Radiology Reports, and Surgery/Procedure Reports** widgets. Clicking  from the **Image** column opens the image(s) in a standalone

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.



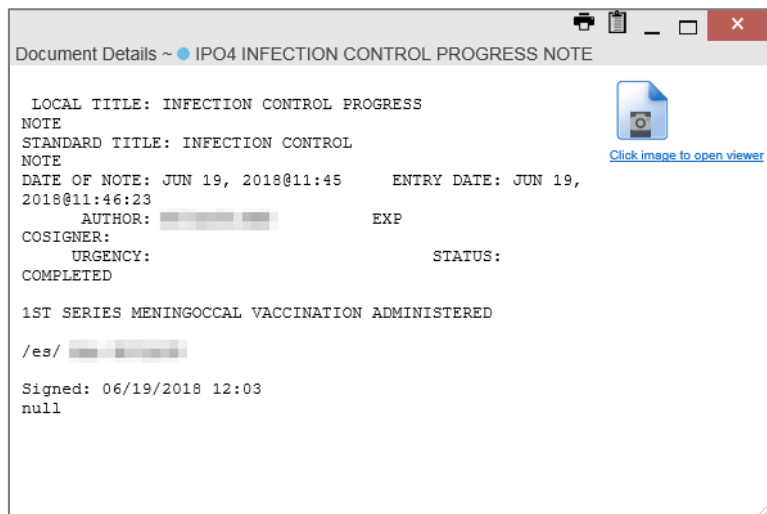
window. Like a hyperlink,  changes color after you launch an image so you can track which images you've viewed in the minimized or expanded widget view of the current session. Changing between minimized and expanded view resets the  color.

Figure 53: Camera Icon in the Image Column

| Date | Description | Provider | Image... | Site |
|--------------|--|----------------|----------|------|
| | Dental CCD Summary 391 KB | | | FEHR |
| | Micro, Anatomic Path, Rad and Dental Notes | HIE-Engine | | FEHR |
| | Patient Continuity of Care Document | Auto Generated | | FEHR |
| Jun 16, 2020 | MISCELLANEOUS DOCUMENT | | | IPO5 |
| Jun 16, 2020 | MISCELLANEOUS DOCUMENT-50 | | | IPO5 |
| Jun 11, 2020 | IMAGE-jpeg | | | IPO5 |
| May 28, 2020 | IMAGE | | | IPO5 |

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 54](#)). Clicking either the thumbnail or the link opens the VistA Imaging Viewer and displays the associated image(s).

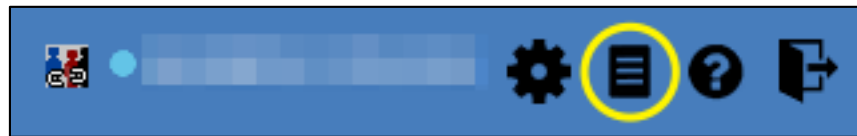
Figure 54: Thumbnail and Link in Details View of the Documents Widget



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 55](#)).

Figure 55: Report Builder Icon

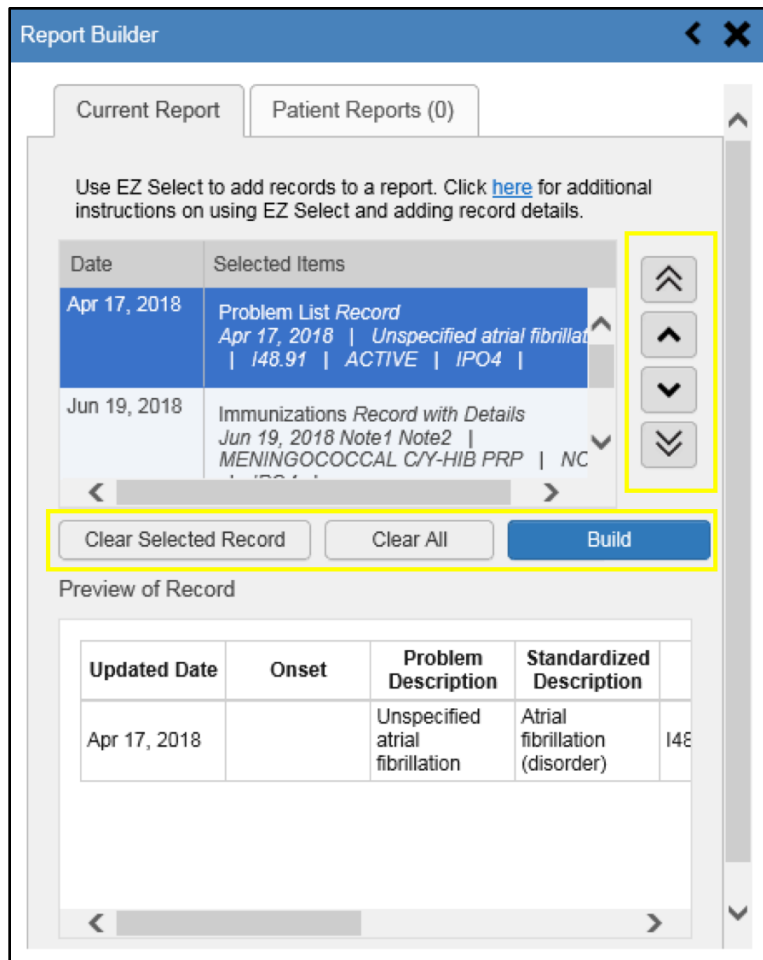


The **Report Builder** pane is comprised of the **Current Report** tab ([Figure 56](#)) and the **Patient Reports** tab ([Figure 57](#)). When open, the **Report Builder** appears docked on the JLV portal.

Click **<** or **>** to minimize or maximize 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.

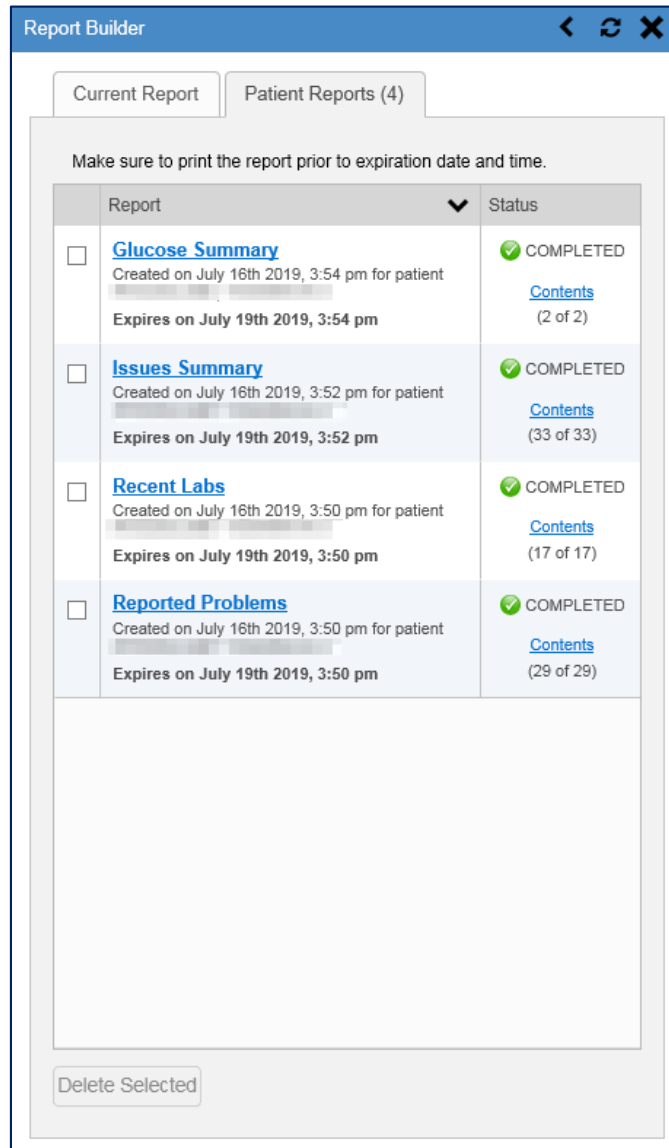
The **Current Report** tab ([Figure 56](#)) is used to build the custom report. The patient data and/or records are listed here as you select and add them. The records can be previewed and can be arranged in the desired order for the final report.

Figure 56: Current Report Tab




The **Patient Reports** tab ([Figure 57](#)) 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 57: 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

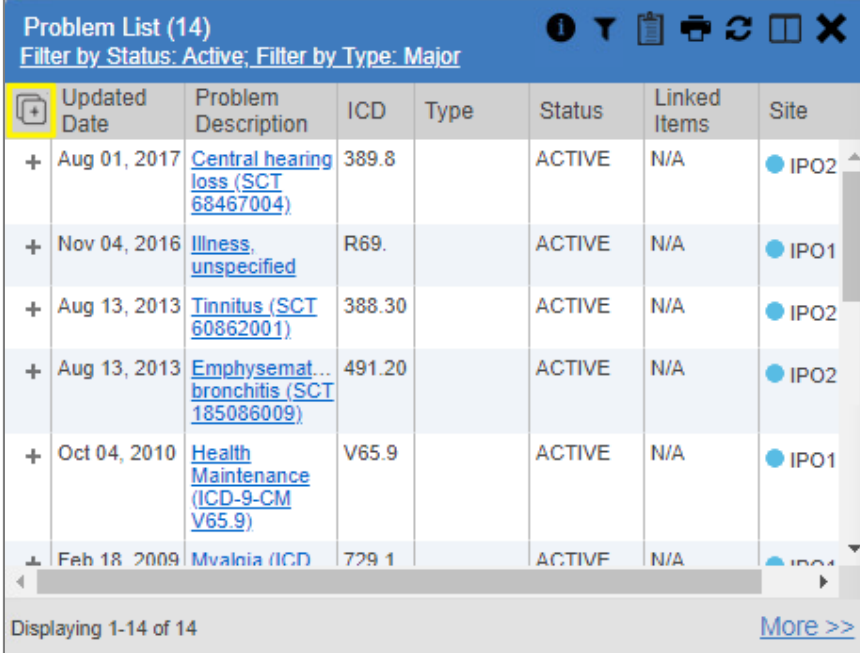
Click **+** next to a record in a widget to add data from that record to the Report Builder, including the details and notes associated with the record. **+** in the row changes to  to confirm the record has been added to the Report Builder ([Figure 59](#)). This applies to both minimized and expanded widget views and the **Patient Flags and Postings** dialog box.

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 58) 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.

i **NOTE:** Sensitive records and Medication Administration History (MAH) / Medication Administration Log (MAL) reports accessed from the **Inpatient Medications** 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 **Inpatient Medications** widget. However, you can use EZ Select to add MAH/MAL reports to Report Builder from the **Health Summaries and Reports** widget.

Figure 58: Report Builder EZ Select



The screenshot shows a window titled "Problem List (14)" with a filter "Filter by Status: Active; Filter by Type: Major". The window contains a table with the following data:

| | Updated Date | Problem Description | ICD | Type | Status | Linked Items | Site |
|---|--------------|--|--------|------|--------|--------------|--|
|  | Aug 01, 2017 | Central hearing loss (SCT 68467004) | 389.8 | | ACTIVE | N/A |  IPO2 |
| + | Nov 04, 2016 | Illness, unspecified | R69. | | ACTIVE | N/A |  IPO1 |
| + | Aug 13, 2013 | Tinnitus (SCT 60862001) | 388.30 | | ACTIVE | N/A |  IPO2 |
| + | Aug 13, 2013 | Emphysemat... bronchitis (SCT 185086009) | 491.20 | | ACTIVE | N/A |  IPO2 |
| + | Oct 04, 2010 | Health Maintenance (ICD-9-CM V65.9) | V65.9 | | ACTIVE | N/A |  IPO1 |
| - | Feb 18, 2009 | Mvalnia (ICD) | 729.1 | | ACTIVE | N/A |  IPO1 |

At the bottom of the window, it says "Displaying 1-14 of 14" and has a "More >>" link.




+ in each row changes to  to confirm the record has been added (Figure 59).

Figure 59: Records Added to Report Builder

| Problem List (14) | | | | | | | |
|---|--------------|--|--------|------|--------|--------------|--------|
| Filter by Status: Active; Filter by Type: Major | | | | | | | |
| | Updated Date | Problem Description | ICD | Type | Status | Linked Items | Site |
| RB ↶ | Aug 01, 2017 | Central hearing loss (SCT 68467004) | 389.8 | | ACTIVE | N/A | ● IPO2 |
| RB ↶ | Nov 04, 2016 | Illness, unspecified | R69. | | ACTIVE | N/A | ● IPO1 |
| RB ↶ | Aug 13, 2013 | Tinnitus (SCT 60862001) | 388.30 | | ACTIVE | N/A | ● IPO2 |
| RB ↶ | Aug 13, 2013 | Emphysemat... bronchitis (SCT 185086009) | 491.20 | | ACTIVE | N/A | ● IPO2 |
| RB ↶ | Oct 04, 2010 | Health Maintenance (ICD-9-CM V65.9) | V65.9 | | ACTIVE | N/A | ● IPO1 |
| RB ↶ | Feb 18, 2009 | Mvalnia (ICD) | 729.1 | | ACTIVE | N/A | ● IPO1 |

Displaying 1-14 of 14 [More >>](#)

i **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


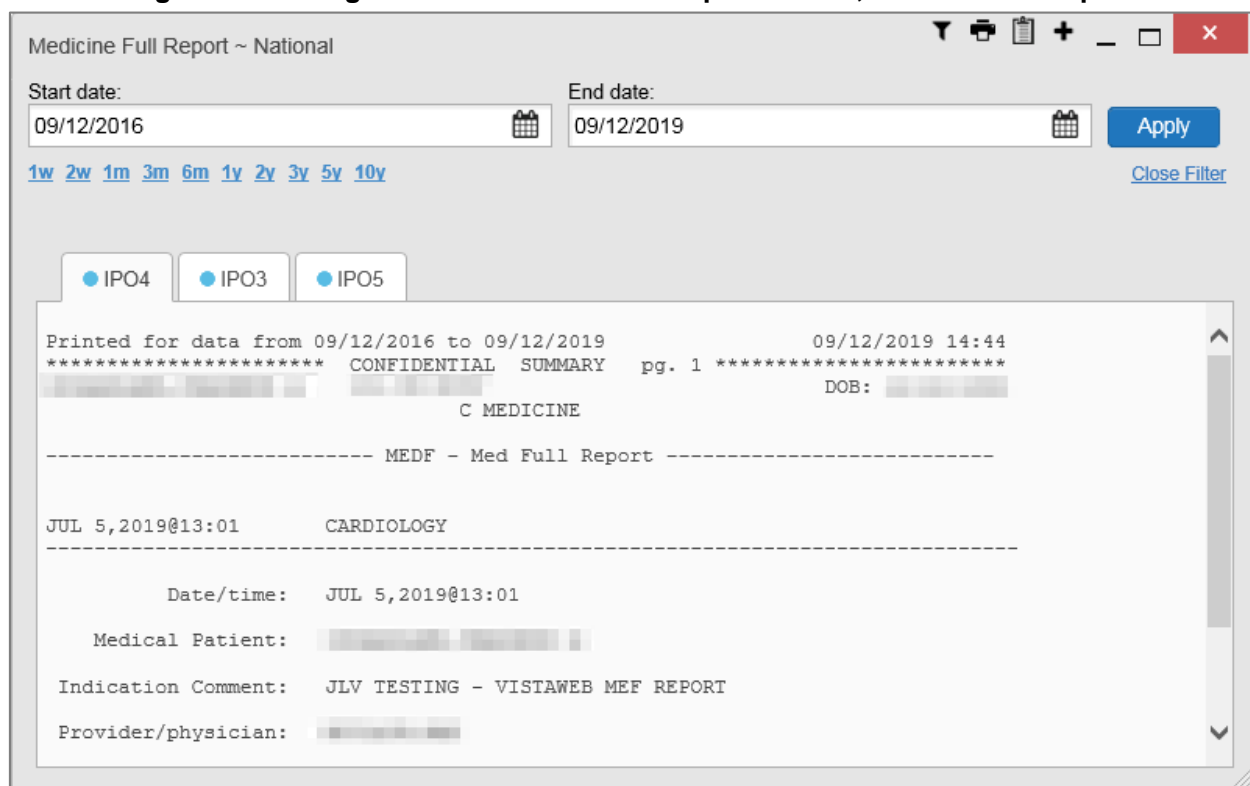
When the **Details** view of a record has a date filter ([Figure 60](#))—as in the **Health Summaries and Reports**, **Inpatient Medications**, and **Procedures** widgets— resets to **+** each time you change the date range, allowing you to build date-flexible reports using records from multiple date ranges.

Figure 60: 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 **RB** to confirm the record has been added ([Figure 59](#)). 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:

1. Select and hold **+** to access these options ([Figure 61](#))
2. 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
3. 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 61: Report Builder Options

| Updated Date | Problem Description | ICD | Type | Status | Linked Items | Site |
|--------------|-------------------------------------|--------|------|--------|--------------|------|
| Aug 01, 2017 | Central hearing loss (SCT 68467004) | 389.8 | | ACTIVE | N/A | IPO2 |
| Nov 04, 2016 | Illness, unspecified | R69. | | ACTIVE | N/A | IPO1 |
| Aug 13, 2013 | Tinnitus (SCT 60862001) | 388.30 | | ACTIVE | N/A | IPO2 |
| Aug 13, 2013 | Emohvsemat... | 491.20 | | ACTIVE | N/A | IPO2 |
| | | V65.9 | | ACTIVE | N/A | IPO1 |
| Feb 18, 2009 | Mvalnia (ICD-9-CM V65.9) | 729.1 | | ACTIVE | N/A | IPO1 |

i **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 62](#)) adds the patient's demographics details for that site to the Report Builder. **+** changes to **RB** 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 62: Demographics Widget Add to Report Builder Icon

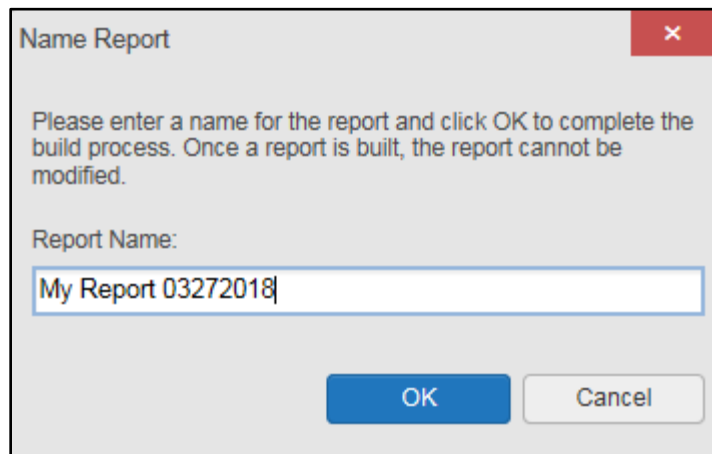


4.11.7. Generating a Report

The selected records appear in the **Report Builder** pane ([Figure 56](#)).

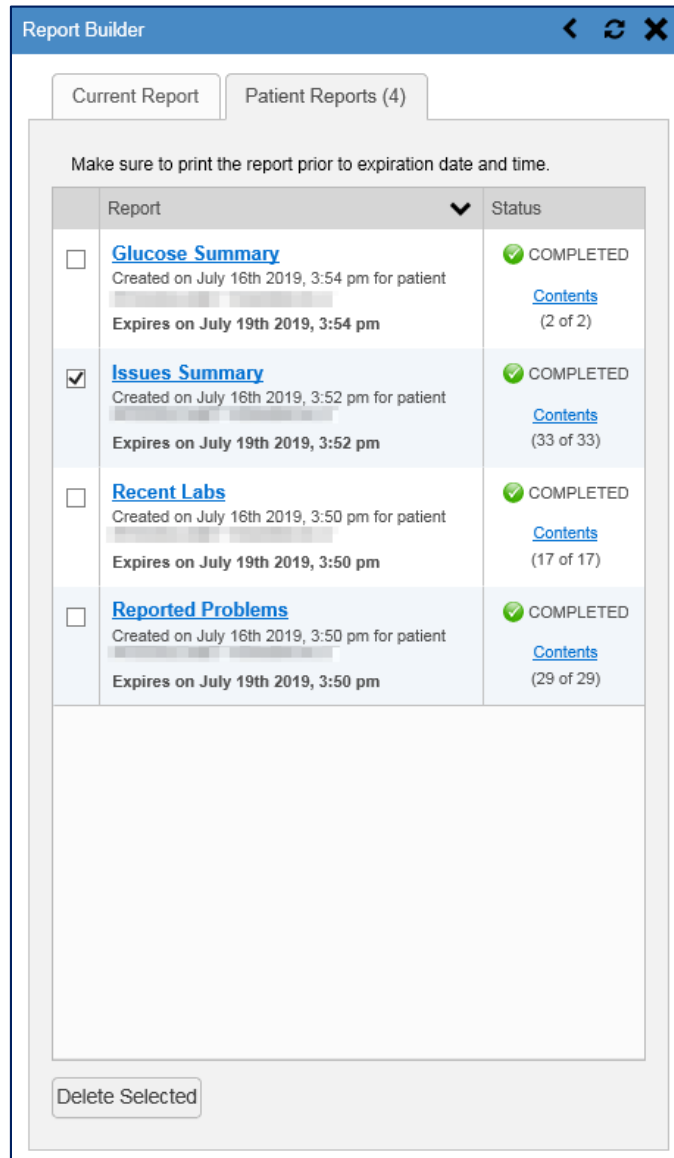
1. Use the navigation arrows to arrange the records in the desired order in the generated report
 - a. Records can be removed by clicking **Clear Selected Record** or **Clear All**
2. When a record is selected for the report, it appears in the **Preview of Record** area of the **Report Builder** pane
3. Click **Build** to validate the selected records and prepare the report
 - a. If a record is added to the report without an error, a **Ready** notation displays next to it in the **Status** column
 - b. If a record cannot be added to the report, an **Error** notation appears next to the record
4. Name the report when prompted, and click **OK** ([Figure 63](#))

Figure 63: Name Report Dialog Box



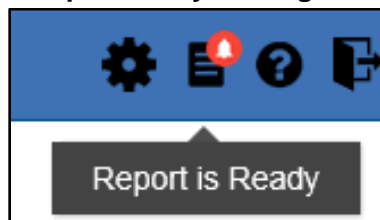
5. The **Patient Reports** tab opens and displays a report processing indicator in the **Status** column
6. When processing is complete, the **Status** column displays either *COMPLETED* or *ERROR* ([Figure 64](#))
 - a. An *ERROR* in the **Status** column does not indicate the report failed to build, it is an indicator that one or more records could not be included in the generated report
 - b. Both the *COMPLETED* and *ERROR* entries include a **Contents** link ([Figure 64](#)), which provides a list of the records that appear in the generated report

Figure 64: Patient Reports Tab Report Ready and Delete Option



- c. A report ready message appears for 6 seconds on the portal page when the report has been built and is ready to be printed ([Figure 65](#))
- d. A red icon ([Figure 65](#)) appears over the **Report Builder** icon when report builder is closed to indicate that a report is ready to be printed

Figure 65: Report Ready Message and Indicator

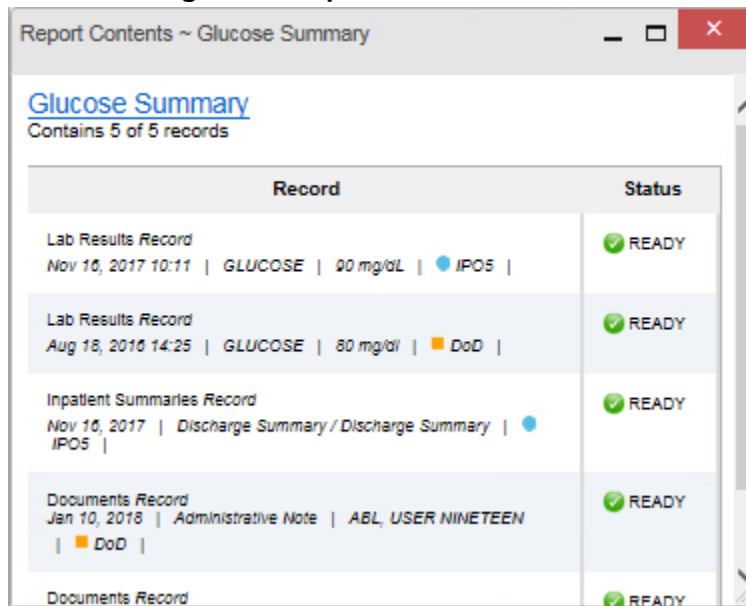


i **NOTE:** Once a report is created, it is available on the Patient Reports tab for 72 hours. After 72 hours, the report expires, is removed from the Patient Reports tab, and can no longer be accessed.

4.11.8. Opening a Report

1. Click the report name in the **Report** column of the **Patient Reports** tab ([Figure 64](#)) **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 64](#)) **OR**
3. Click the blue, hyperlinked report name in the **Report Contents** window ([Figure 66](#))

Figure 66: Report Contents Window



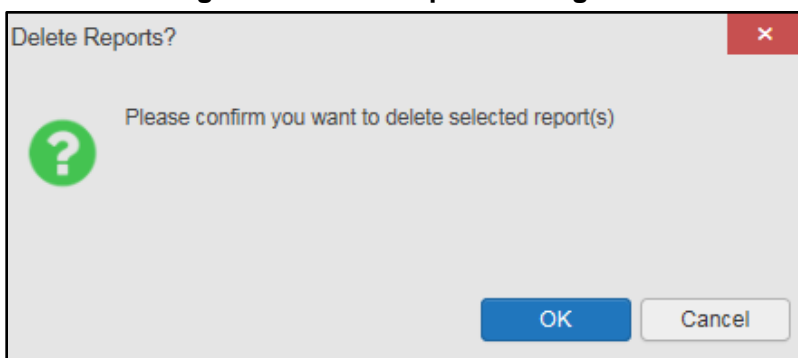
| Record | Status |
|---|---------|
| Lab Results Record Nov 16, 2017 10:11 GLUCOSE 90 mg/dL IPO5 | ✓ READY |
| Lab Results Record Aug 18, 2016 14:25 GLUCOSE 80 mg/dl DoD | ✓ READY |
| Inpatient Summaries Record Nov 16, 2017 Discharge Summary / Discharge Summary IPO5 | ✓ READY |
| Documents Record Jan 10, 2018 Administrative Note ABL, USER NINETEEN DoD | ✓ READY |
| Documents Record | ✓ READY |

i **NOTE:** The Report Builder prints the report content to a file in PDF format. It is recommended that you have the latest Adobe Reader installed on the system from which you access 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 64](#))
2. Click the **Delete Selected** button
3. Click **OK** to confirm deletion ([Figure 67](#))


Figure 67: 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 68](#)). The site tabs provide a demographics summary for each site (VA or DOD) the patient has visited.

Figure 68: Patient Demographics Widget







Nonclinical, personal data displayed for the patient varies by site and could include name, address, SSN, age, DOB, race, phone numbers, birth sex, and gender ID (SIGI). SIGI code values are listed in [Table 8](#).

Table 8: Gender ID (SIGI) Code Values

| Code | Description |
|----------------|---------------------------------------|
| M | Male |
| F | Female |
| 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  opens clinical flag details in a new window
- Clicking  opens the **Advance Directives** dialog in a new window

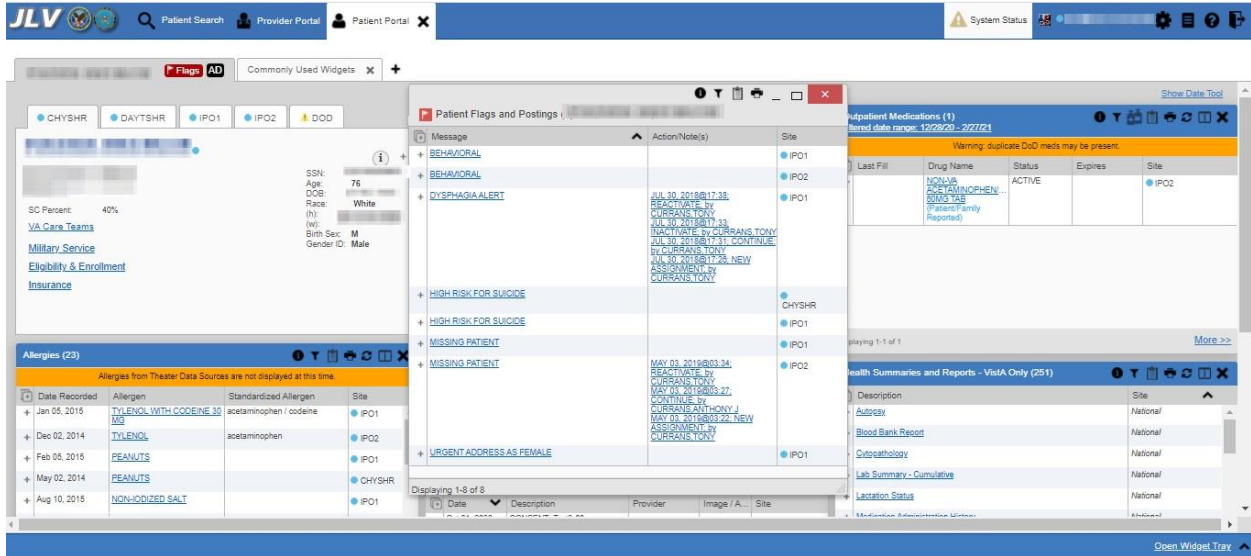
If  displays on one or more tabs within the **Demographics** widget, it is an indication that the patient is not registered at that VA site or DOD facility.

5.1.1. Patient Flags and Alerts

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 69).

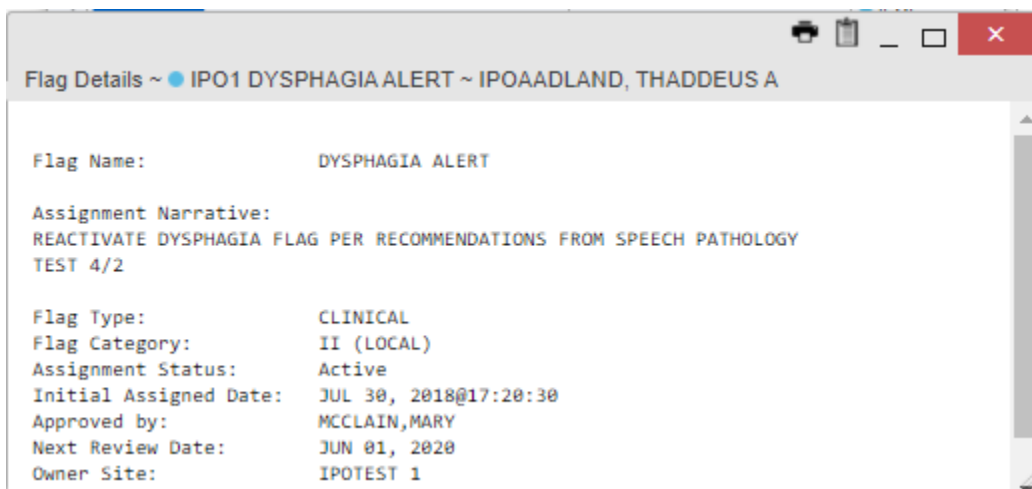
The **Patient Flags and Postings** window opens and displays by default when the **Patient Portal** opens if there are warnings associated with the selected patient.

Figure 69: Patient Flags Indicator



Click **Flags** to open the **Patient Flags and Postings** window (Figure 69). 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 70). Selecting the **Action/Note(s)** link (Figure 69) will open documents pertaining to placement of the flag. If the patient's record does not contain any clinical warnings, **Flags** is not displayed.

Figure 70: Patient Flags and Postings Details



5.1.2. Advance Directives







You can view Advance Directives ([Figure 71](#)) by selecting  on **Demographics** widget. Advance Directives are pulled from DOD and VA data sources.  changes to  when loading, and it is greyed out  if Advance Directives were not found for the patient.

Figure 71: Advanced Directives Dialog

| Date | Document Title | Image | Site |
|----------------|-----------------------------------|--|--------|
| + Sep 15, 2006 | ADVANCE DIRECTIVE |  | ● IPO4 |
| + Jan 17, 2003 | ADVANCE DIRECTIVE |  | ● IPO4 |

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 72](#):

- 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 72: Insurance Information

| Health Plan Type | Health Plan Name | Standardized Insurance Type | Plan Effective Date | Plan Expiration Date | Site | Group Number | Member ID |
|------------------------|------------------------|-----------------------------|---------------------|----------------------|--------|--------------|-----------|
| + MEDICARE (M) | MEDICARE (WNR) | Medicare Primary | Feb 01, 1996 | | • IPO1 | | |
| + MEDICARE (M) | MEDICARE (WNR) | Medicare Primary | Feb 01, 1996 | | • IPO1 | | |
| + RETIREE | UNITEDHEALTHCARE | Other | | | • IPO1 | | |
| + TRICARE SUPPLEMENTAL | WPS-TRICARE FOR L (SC) | | 09, 2007 | | • IPO1 | | |

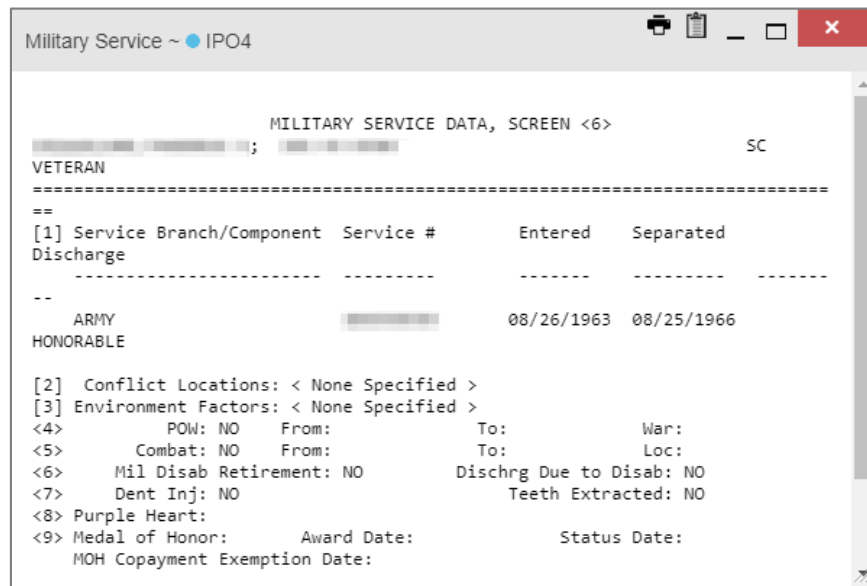
Displaying 1-4 of 4

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 73](#)) are available from the **Patient Demographics** widget. Click the **Military Service** link in the **Demographics** widget.

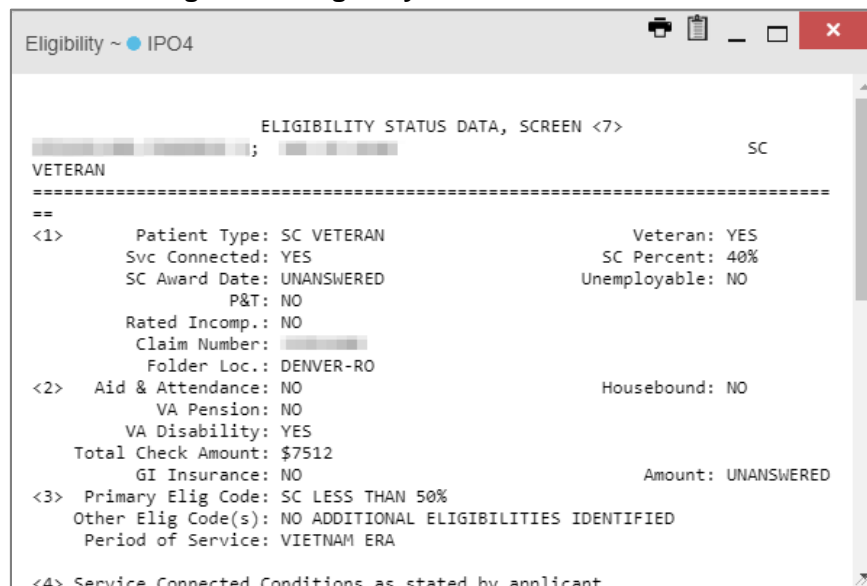
Figure 73: Military Service Window



5.1.5. Viewing Eligibility and Enrollment Data


Eligibility and enrollment data (Figure 74) are available from the **Patient Demographics** widget. Click the **Eligibility & Enrollment** link in the **Demographics** widget.

Figure 74: Eligibility and Enrollment Window



5.2. Cardiology Studies—VA MUSE Only Widget

The **Cardiology Studies—VA MUSE Only** widget (Figure 75) displays electrocardiograms (EKGs) and cardiology studies with related images from all 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.

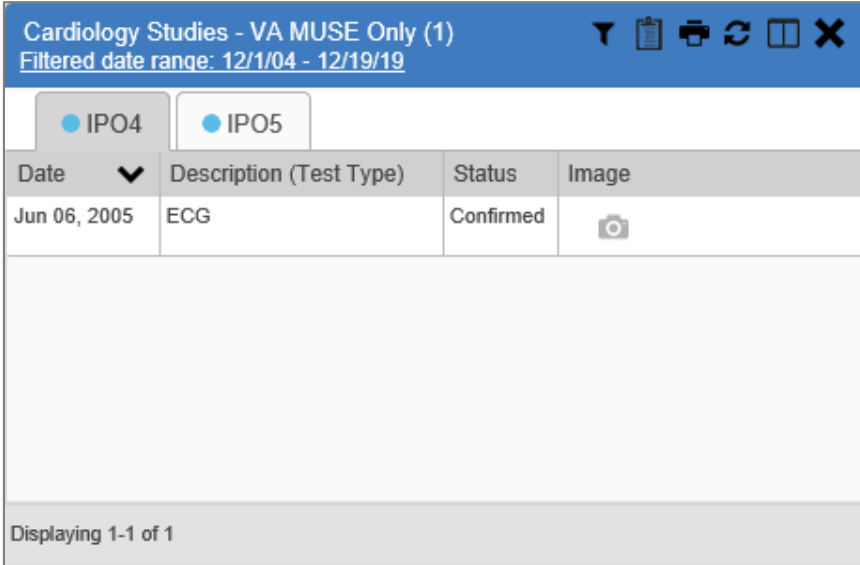
5.2.1. Cardiology Studies—VA MUSE Only Widget Data


The information in the **Cardiology Studies—VA MUSE Only** widget includes:

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


There is no expanded view for this widget.


Figure 75: Cardiology Studies—VA MUSE Only Widget



| Date | Description (Test Type) | Status | Image |
|--------------|-------------------------|-----------|--|
| Jun 06, 2005 | ECG | Confirmed |  |

5.3. Community Health Summaries and Documents

The  **Community Health Summaries and Documents** widget ([Figure 76](#)) 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** column.

 **NOTE:** CAPRI-Claims users cannot see the **Community Health Summaries and Documents** widget.

5.3.1. Community Health Summaries and Documents Widget Data

Data displayed within the **Community Health Summaries and Documents** widget ([Figure 76](#)) 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 76: Community Health Summaries and Documents, Minimized View

| Date | Document Type/Title | Site |
|----------------|--|----------|
| + Jun 23, 2020 | MEDVA CCHN CCDA - TEST | ● MEDVA |
| + Mar 03, 2000 | KAISER Adventist - Parse TEST | ● KAISER |
| + Jan 01, 2000 | SSA HHIE JJEST CCDA - Parse Test | ● SSA |
| + Jan 01, 2000 | SSA New C32-2019 | ● SSA |
| + Jan 01, 2000 | SSA GWINNETT MEDICAL GROUP CCDA | ● SSA |
| + Jan 01, 2000 | SSA C62-March 2019 | ● SSA |
| + Jan 01, 2000 | MEDVA NEW C32-2019 | ● MEDVA |

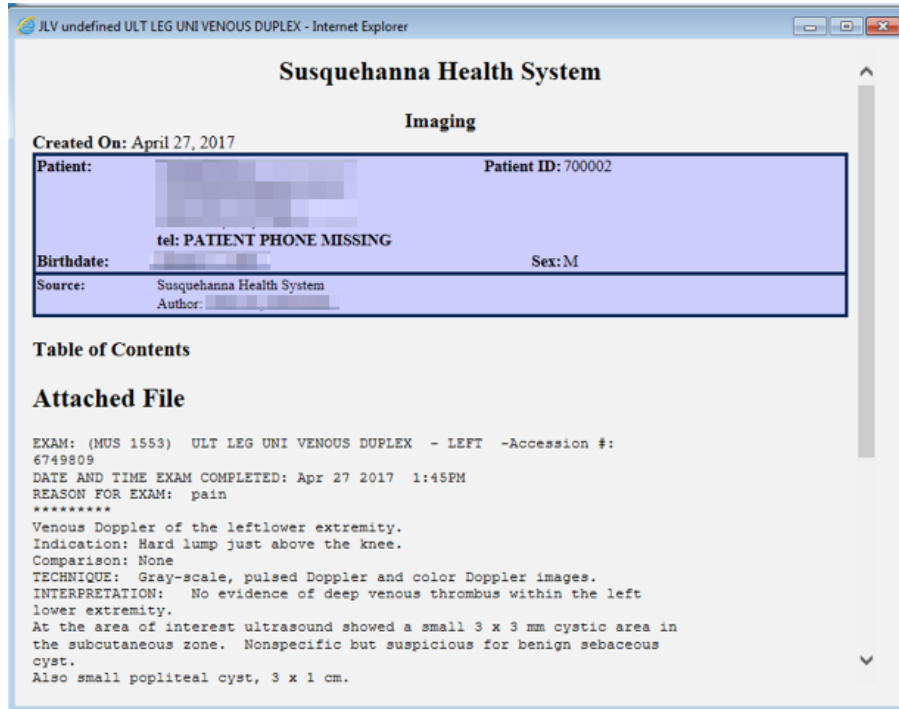
Displaying 1-12 of 12

5.3.2. Viewing VA Community Health Summary Documents


The **Community and Health Summaries and Documents** widget renders only in minimized view. Instead of an expanded view, clicking a hyperlinked entry in the **Document Type/Title** column document opens in a new browser window ([Figure 77](#)).

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

Figure 77: Community Health Document



5.4. Documents Widget

The  **Documents** widget ([Figure 78](#)) includes documents from multiple clinical domains, including radiology reports (exams), progress notes, outpatient encounters, consult encounters, 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.

5.4.1. Documents Widget Data

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

- Date
- Description
- Provider
- Image/Attachment (See [Image Support](#))
- Site

Figure 78: Documents Widget, Minimized View

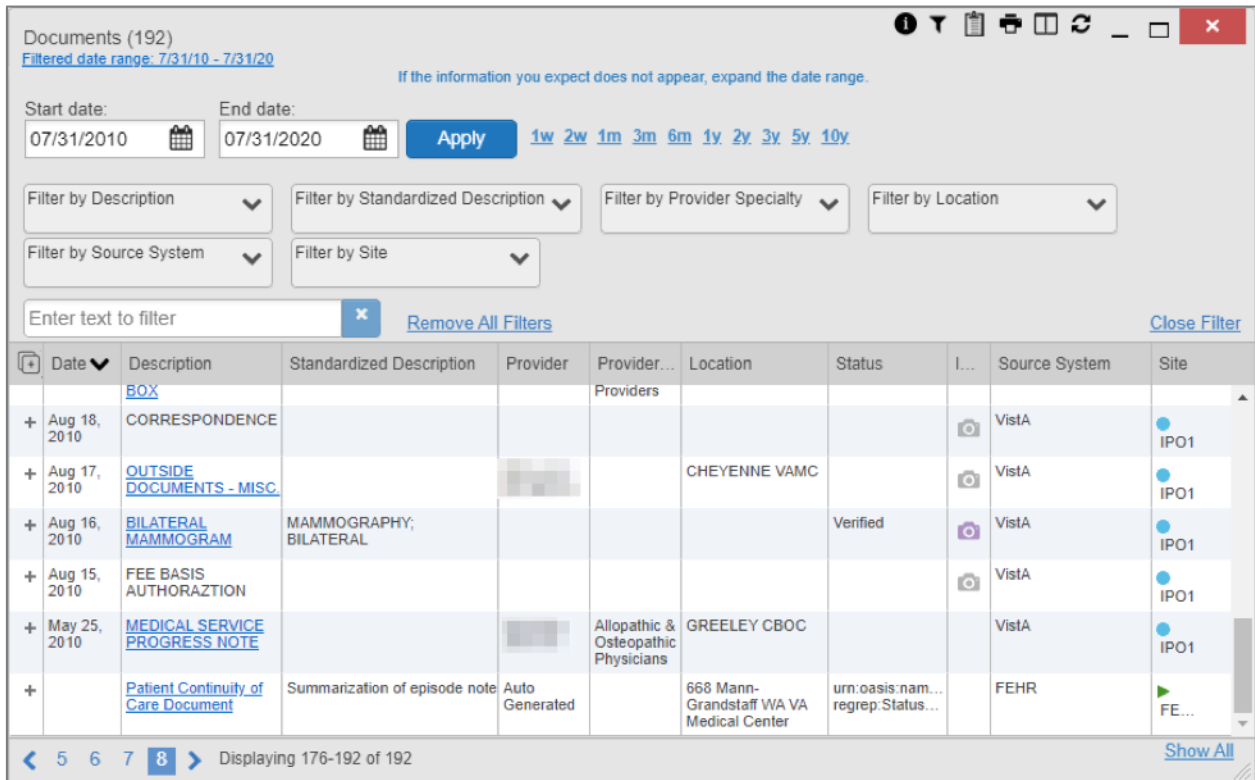
| Date | Description | Provider | Image... | Site |
|--------------|--|----------------|----------|--------|
| | Dental CCD Summary 391 KB | | | ▶ FEHR |
| | Micro, Anatomic Path, Rad and Dental Notes | HIE-Engine | | ▶ FEHR |
| | Patient Continuity of Care Document | Auto Generated | | ▶ FEHR |
| Jun 16, 2020 | MISCELLANEOUS DOCUMENT | | | ● IPO5 |
| Jun 16, 2020 | MISCELLANEOUS DOCUMENT-50 | | | ● IPO5 |
| Jun 11, 2020 | IMAGE-jpeg | | | ● IPO5 |
| May 28, 2020 | IMAGE | | | ● IPO5 |

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

Click **More >>** in the minimized view of the **Documents** widget to open the expanded view ([Figure 79](#)). Information in expanded view includes:

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

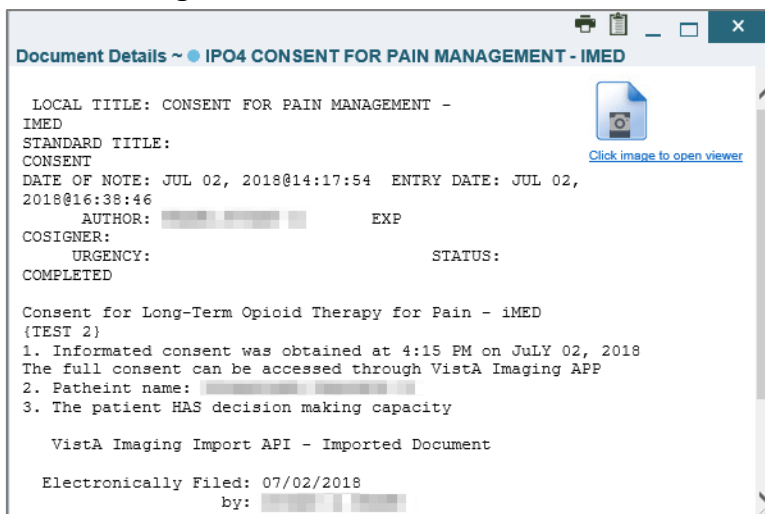
Figure 79: Documents Widget, Expanded View




5.4.2. Viewing Documents

Click a hyperlinked entry in the **Description** column in either the minimized or expanded view of the **Documents** widget to access additional information for a listed record. Depending on the record type, the additional information may open in either a **Details** window or a separate browser window. [Figure 80](#) displays outpatient encounters details, accessed through the **Documents** widget.

Figure 80: Details View of a Document



5.5. 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.

5.5.1. Federal EHR/MHS GENESIS Widget Data

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

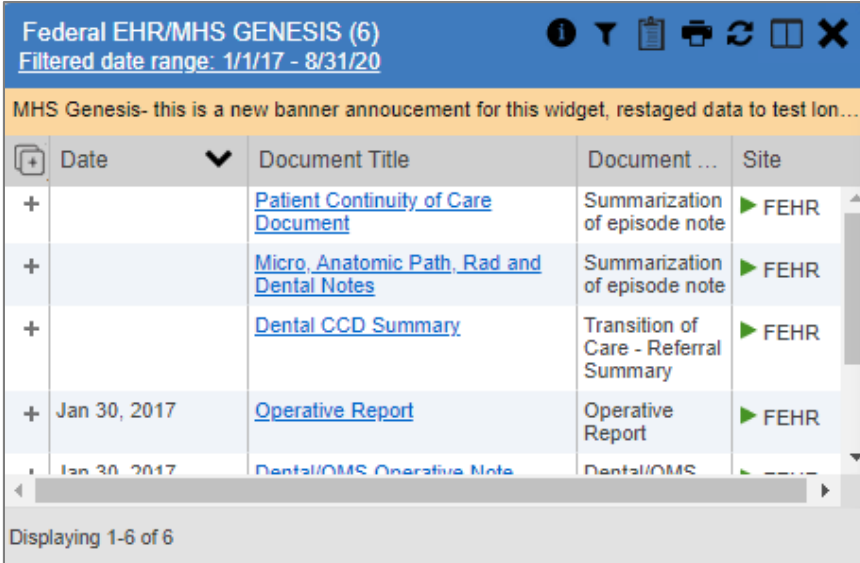
- Date
- Document Title
- Document Type
- Site

[Figure 81](#) 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 82](#)).

 **NOTE:** The **Outpatient Medications** 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 81: Federal EHR/MHS GENESIS Widget



| Federal EHR/MHS GENESIS (6) Filtered date range: 1/1/17 - 8/31/20 | | | | |
|--|--|---------------------------------------|------|--|
| MHS Genesis- this is a new banner announcement for this widget, restaged data to test lon... | | | | |
| Date | Document Title | Document ... | Site | |
| | Patient Continuity of Care Document | Summarization of episode note | FEHR | |
| | Micro, Anatomic Path, Rad and Dental Notes | Summarization of episode note | FEHR | |
| | Dental CCD Summary | Transition of Care - Referral Summary | FEHR | |
| Jan 30, 2017 | Operative Report | Operative Report | FEHR | |
| Jan 30, 2017 | Dental/OMS Operative Note | Dental/OMS | | |

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5.5.2. 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 C-CDA document ([Figure 82](#)) in a new browser window.

Figure 82: C-CDA Document

Transition of Care/Referral Summary
created on: February 28, 2017, 14:30:17, CST
Source: MB Military Baseline Medical Center
7700 Arlington Blvd
Falls Church, VA 20400- , US
tel:(555)555-5555

**MB Military Baseline
Medical Center**

Patient: [REDACTED]
DOB: [REDACTED]
Gender: Male
Patient ID: 666000001

[-] Table of Contents

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

[-] Patient Information

| Patient Information | |
|-----------------------|------------------------------|
| Address | Primary Home: [REDACTED], US |
| Marital status | |
| Religious Affiliation | |
| Race | Black or African American |
| Ethnicity | Not Hispanic or Latino |
| Language(s) | |
| Preferred Language | |

[-]Encounters

| Date | Type | Specialty | Providers | Description | Reason for Visit | Source |
|----------------------------------|------|-----------|-----------|-------------|------------------|----------------------|
| February 17, 2017, 07:53:23, PST | | | | | | FC Fairchild Clinics |
| February 17, 2017, 07:52:34, PST | | | | | | FC Fairchild Clinics |

5.6. Health Summaries and Reports—VistA Only Widget

5.6.1. 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, MAH¹⁷, MAL¹⁸, Medicine Full, Surgical Pathology, Transfers, and Unit Dose reports. This widget is available to VA users only.

¹⁷ Limited to any 7-day period

¹⁸ Limited to any 14-day period

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.

Information in the minimized view of the **Health Summaries and Reports—VistA Only** widget ([Figure 83](#)) includes:

- Description
- Site

Figure 83: Health Summaries and Reports—VistA Only Widget, Minimized View

| Description | Site |
|---|----------|
| Autopsy | National |
| Blood Bank Report | National |
| Cytopathology | National |
| Lab Summary - Cumulative | National |
| Lactation Status | National |
| Medication Administration History | National |
| Medication Administration Log | National |
| Medicine Full Report | National |

Click **More >>** 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 84](#)) includes:

- Description
- Type
- Site

Figure 84: Health Summaries and Reports—VistA Only Widget, Expanded View

| Description | Type | Site |
|---|----------|----------|
| Autopsy | National | National |
| Blood Bank Report | National | National |
| Cytopathology | National | National |
| Lab Summary - Cumulative | National | National |
| Lactation Status | National | National |
| Medication Administration History | National | National |
| Medication Administration Log | National | National |
| Medicine Full Report | National | National |
| Preg & Lac Status | National | National |
| Pregnancy Status | National | National |
| REMOTE MHV REMINDERS DETAIL | National | National |
| REMOTE MHV REMINDERS SUMMARY | National | National |
| Remote Clinical Data (3m) | National | National |
| Remote Clinical Data (1y) | National | National |

5.6.2. 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 85](#) displays a health summary record exported from a single, local site.

Figure 85: Health Summary from a Single, Local Site

C&P EXAMS ~ IPO4

07/17/2019 12:40

***** CONFIDENTIAL C&P EXAMS SUMMARY pg. 1 *****

DOB: [REDACTED]

----- SPN - Selected Prog Notes -----

07/01/2003 10:22 Local Title: C&P MEDICAL
Standard Title: C & P EXAMINATION NOTE

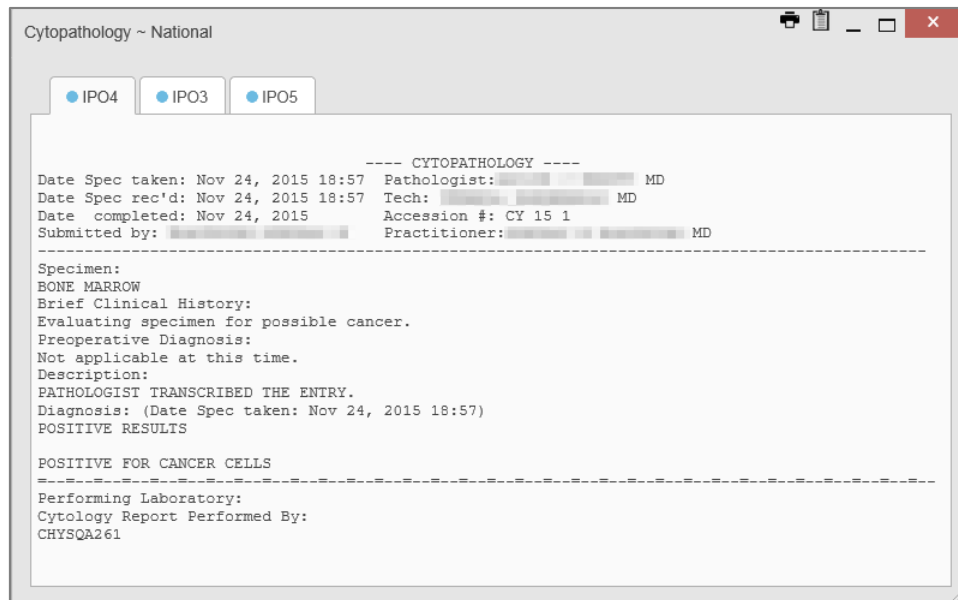
PATIENT NAME: [REDACTED]

Veteran was seen in C&P [REDACTED] on July 1st and logged in at 9:30.

HISTORY: This is a 58-year-old veteran who was in for an examination of his heart. The veteran was shoveling snow on March 18th, 2003, when he developed chest pain. He was seen at Poudre Valley Hospital and he underwent an angiogram, which showed a total occluded proximal right coronary artery. An angioplasty and a stent was placed. He then was placed in cardiac rehabilitation and he noted the onset of some chest pain with activity. At the Heart Center of the Rockies in May 2003, he underwent an exercise tolerance test and he nearly completed stage IV and the veteran said he went about 11 minutes. He had no chest pain, but there were some EKG changes. He then was seen at the Denver VA and on June 25th, 2003, he underwent an angiogram at the Denver VA. That showed a patent right coronary


[Figure 86](#) 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 86: National Health Summary, Multiple Sites



5.7. Lab Results Widget

5.7.1. 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 **More >>** from the minimized view of the **Lab Results** widget to open the expanded view ([Figure 87](#)). 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


i **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 87: Lab Results Widget, Expanded View

| Collection Date | Specimen Source | Lab Test | Result | Interpretation | Units | Ref Range | Lab Panel | Type | Order Num... | Ordering HC |
|--------------------|-----------------|------------------------------------|------------------------|----------------|-------|-------------|-----------|------|---------------------------------------|-------------|
| Jun 19, 2019 23:59 | | Blood Bank Report | result | | | | | BB | | |
| Dec 12, 2018 09:40 | ABDOM | SURGICAL PATHOLOGY | result | | | | | SP | | |
| Oct 03, 2018 18:06 | SERUM | TOT_BILIRUBIN | 0.3 mg/dL | | mg/dL | 0.00 - 1.00 | | CHEM | *970d280f-6ed2-4e45-a319-c9a839c02535 | |
| Oct 03, 2018 18:06 | SERUM | SGPT (ALT) | 16 U/L | L | U/L | 30 - 65 | | CHEM | *970d280f-6ed2-4e45-a319-c9a839c02535 | |
| Oct 03, 2018 18:06 | SERUM | SGOT (AST) | 12 U/L | L | U/L | 15 - 37 | | CHEM | *970d280f-6ed2-4e45-a319-c9a839c02535 | |

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

5.7.2. 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 88](#)).

Figure 88: Lab Results Details

| Lab Test | Standardized Lab Test | Specimen Source | Result | Result Date | Units | Interpretation | Reference Range | Certification Date | Performing Lab | Comment |
|-----------|--|-----------------|--------|-------------|-------|----------------|-----------------|-------------------------------|----------------|--|
| POTASSIUM | Potassium [Moles/volume] in Serum or Plasma Standardized Code: 2823-3 | SERUM | 3.6 | 10/7/18 | meq/L | | 3.5 - 5.1 | Certified: Oct 07, 2018 08:25 | CHYSQA280 | Ordering Provider: [REDACTED] Report Released Date/Time: Oct 07, 2018@08:25 Performing Lab: CHYSQA280 |

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

5.7.3. 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 89](#)).

Figure 89: Lab Panel Results Detail

| Lab Test | Standardized Lab Test | Specimen Source | Result | Result Date | Units | Interpretation | Reference Range | Certification Date | Performing Lab | Comment |
|---------------|-----------------------|-----------------|--------|-------------|--------|----------------|-----------------|-------------------------------|----------------|---|
| GLUCOSE | | SERUM | 119 | 10/7/18 | mg/dL | H | 65 - 99 | Certified: Oct 07, 2018 08:25 | CHYSQA260 | Ordering Provider: [REDACTED] Report Released Date/Time: Oct 07, 2018@08:25 Performing Lab: CHYSQA260 |
| UREA NITROGEN | | SERUM | 9 | 10/7/18 | mg/dL | | 7 - 18 | Certified: Oct 07, 2018 08:25 | CHYSQA260 | Ordering Provider: [REDACTED] Report Released Date/Time: Oct 07, 2018@08:25 Performing Lab: CHYSQA260 |
| CREATININE | | SERUM | 0.73 | 10/7/18 | mg/dL | | 0.60 - 1.30 | Certified: Oct 07, 2018 08:25 | CHYSQA260 | Ordering Provider: [REDACTED] Report Released Date/Time: Oct 07, 2018@08:25 Performing Lab: CHYSQA260 |
| eGFR | | SERUM | 102 | 10/7/18 | mL/min | | - | Certified: Oct 07, 2018 08:25 | CHYSQA260 | Ordering Provider: [REDACTED] Report Released Date/Time: Oct 07, 2018@08:25 Performing Lab: CHYSQA260 |
| SODIUM | | SERUM | 138 | 10/7/18 | meq/L | | 136 - 145 | Certified: Oct 07, 2018 08:25 | CHYSQA260 | Ordering Provider: [REDACTED] Report Released Date/Time: Oct 07, 2018@08:25 Performing Lab: CHYSQA260 |

5.7.4. 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 90](#).

Figure 90: Lab Results Widget, Abnormal Results in Expanded View

Lab Results (17)
 Filtered date range: 6/19/18 - 6/19/19
 If the information you expect does not appear, expand the date range.

Start date: 06/19/2018 End date: 06/19/2019 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

Lab Results- this is a banner announcement for this widget.

| Collection Date | Specimen Source | Lab Test | Result | Interpretation | Units | Ref Range | Lab Panel | Type | Order Num... | Ordering HC |
|--------------------|-----------------|------------------------------------|------------------------|----------------|-------|-------------|-----------|------|---------------------------------------|-------------|
| Jun 19, 2019 23:59 | | Blood Bank Report | result | | | | | BB | | |
| Dec 12, 2018 09:40 | ABDOM | SURGICAL PATHOLOGY | result | | | | | SP | | |
| Oct 03, 2018 18:06 | SERUM | TOT. BILIRUBIN | 0.3 mg/dL | | mg/dL | 0.00 - 1.00 | | CHEM | *970d280f-6ed2-4e45-a319-c9a839c02535 | |
| Oct 03, 2018 18:06 | SERUM | SGPT (ALT) | 16 U/L | L | U/L | 30 - 65 | | CHEM | *970d280f-6ed2-4e45-a319-c9a839c02535 | |
| Oct 03, 2018 18:06 | SERUM | SGOT (AST) | 12 U/L | L | U/L | 15 - 37 | | CHEM | *970d280f-6ed2-4e45-a319-c9a839c02535 | |

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5.7.5. 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 91](#) highlights multiple result and interpretation links within the widget.


Figure 91: Lab Results Widget, Expanded View, Interpretations Available

[Figure 92](#) 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 92: Lab Results Interpretation Details

5.7.6. Graph/Table View from the Lab Results Widget

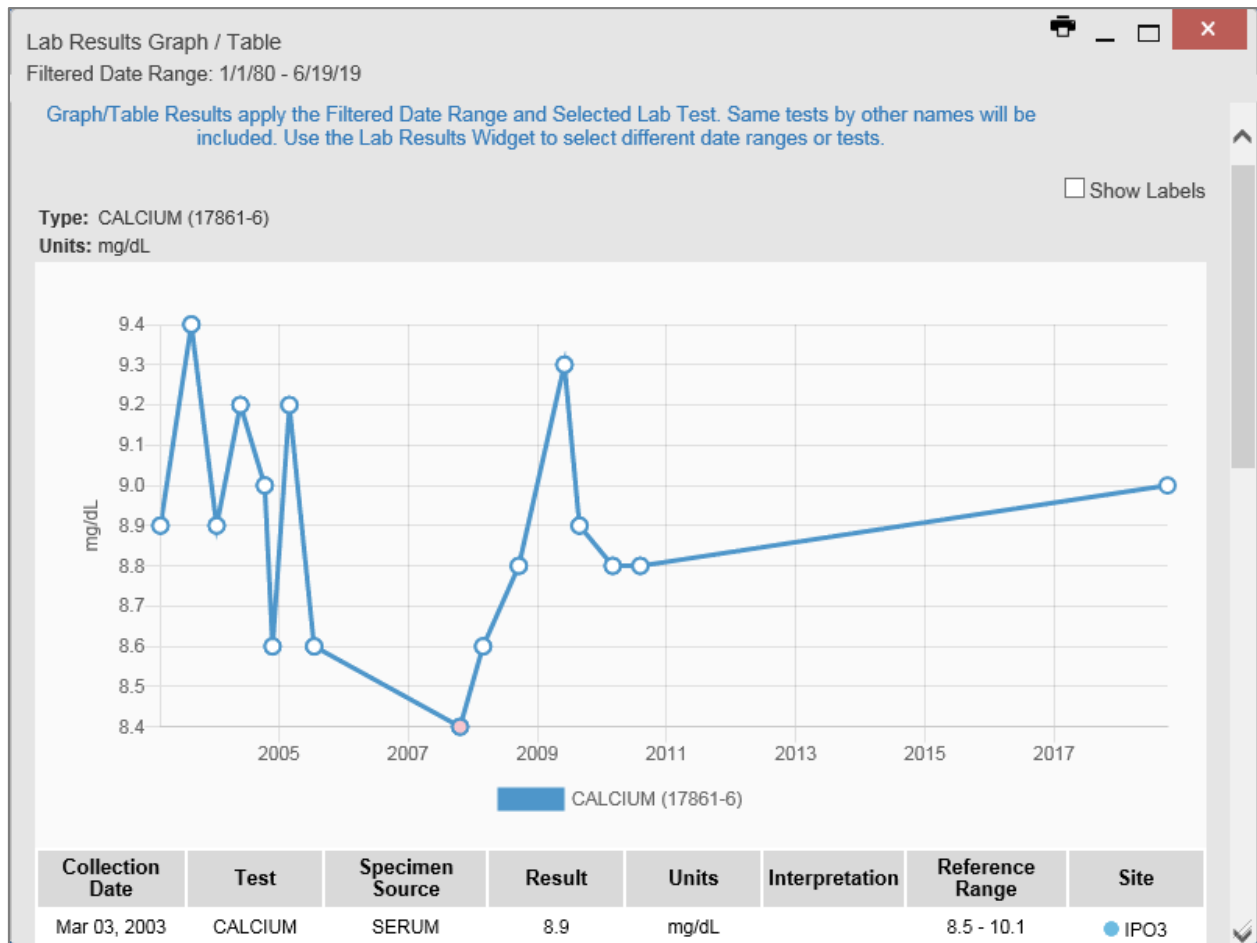
The **Lab Results** widget provides the option to display multiple results for the same lab test in a graph and table.

1. Select  from the widget toolbar in either minimized or expanded view **OR**

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

[Figure 93](#) displays an example **Graph/Table** view of the lab test results.

Figure 93: 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.


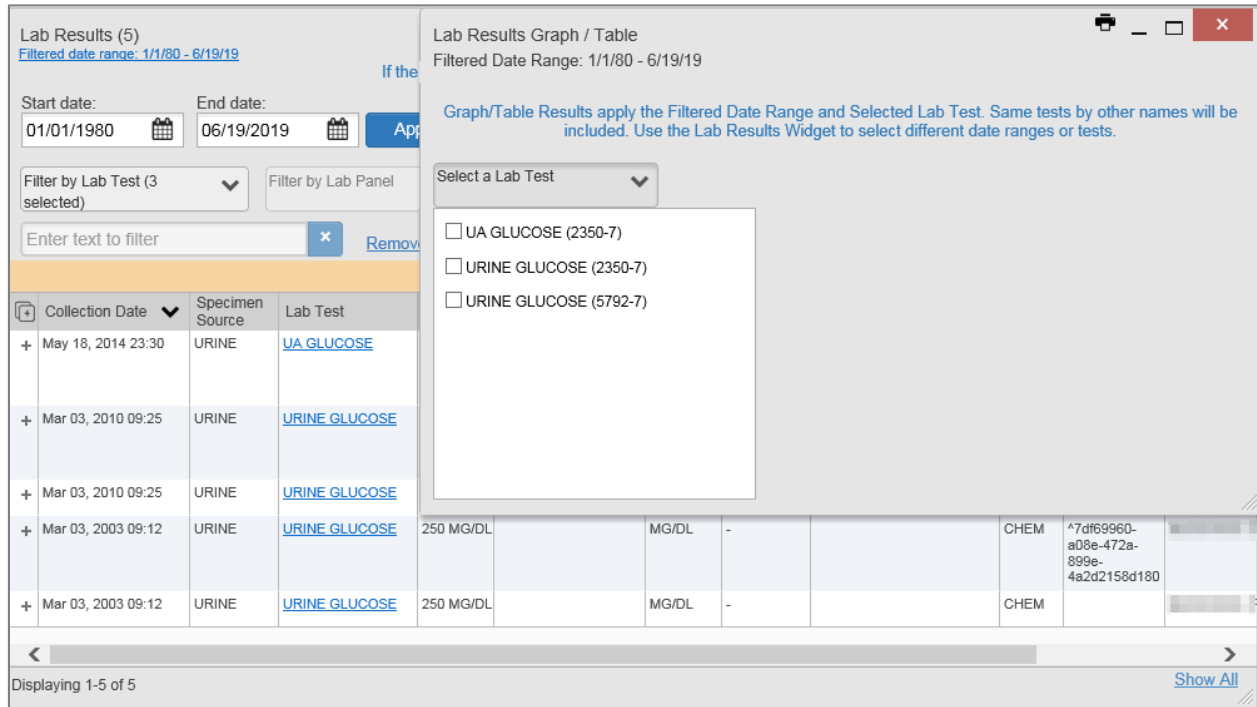

You may only use the graph/table feature for a single lab test LOINC value. All lab tests with the same LOINC will be graphed even if the lab test names differ. While you can select multiple lab test values in the **Filter by Lab Test** dropdown, you will be forced to select a single lab test value from the **Select a Lab Test** dropdown in the **Lab Results Graph/Table** dialog ([Figure 94](#)) 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 94: 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 88](#)).

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 [JLV Resources](#) 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:

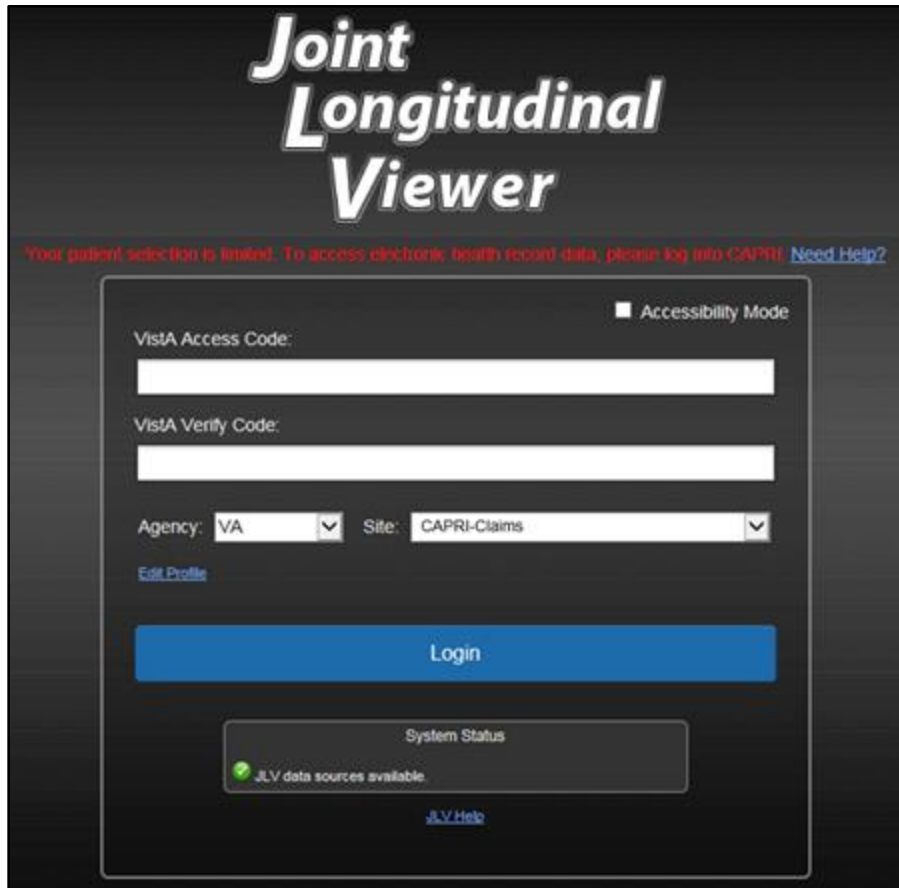
- Have accessed JLV using the JLV URL REDACTED or the **JLV** button in CPRS if available
- Have entered their existing CPRS Access and Verify codes correctly in the fields on the **JLV Login** page
- Have selected a site from the **Site** dropdown list on the **JLV Login** page (Most users must specify 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 95](#) on the **JLV Login** page if attempting to access JLV via the JLV URL.

Figure 95: 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 9](#).

Table 9: Error Messages and Resolution Steps

| Error Message/Behavior | Description/Resolution Steps |
|---|--|
| No access allowed for this user. | <p>WHY? You have not signed into CAPRI or CPRS for 90 days and your account is inactive.</p> <p>FIX IT: Contact the ESD and tell them that either your access to CAPRI or CPRS (whichever you use) has been deactivated.</p> |

| Error Message/Behavior | Description/Resolution Steps |
|--|---|
| <p>Access denied. You are not an authorized user.</p> | <p>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.</p> <p>FIX IT:</p> <p>Reinsert PIV and Choose a Valid Authentication Certificate</p> <ol style="list-style-type: none"> 1) Close your browser window 2) Reinsert your PIV card and relaunch JLV 3) Select a certificate that is not expired and specifies: <i>“Issuer: Veterans Affairs User CA B1”</i> <p>Confirm Your VistA Account is Linked</p> <ol style="list-style-type: none"> 1) Go to the Link My Account website 2) Select a certificate that is not expired and specifies: <i>“Issuer: Veterans Affairs User CA B1”</i> 3) Select <i>Link VistA User</i> 4) Select the VA Medical Center to link 5) Enter your Access/Verify codes 6) Click Submit <p>If neither of these methods resolve the error, contact the ESD.</p> |
| <p>Could not save User Profile.</p> | <p>WHY? The error occurred during PIV authentication. It is either a PIV card processing problem, or you chose the wrong security certificate.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Close your browser window 2) Reinsert your PIV card and relaunch JLV 3) Select a certificate that is not expired and specifies: <i>“Issuer: Veterans Affairs User CA B1”</i> 4) If unsuccessful, close all open browser windows/tabs, then open the browser and try JLV again |
| <p>Not a valid ACCESS/VERIFY CODE pair.</p> | <p>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.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) VHA users must select the parent VistA host site for their facility 2) Reenter your Access and Verify codes (CAPRI codes for CAPRI-Claims users, CPRS codes for VHA users) |
| <p>Page cannot be displayed.</p> | <p>WHY? The JLV URL requires certain IE settings.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Click the Tools menu (press ALT+X) in IE 2) Select Internet Options 3) When the dialog box opens, click the Advanced tab 4) Scroll down in the list until you see the Secure Sockets Layer (SSL) 2.0 setting, and ensure it is NOT checked 5) Ensure that the Transport Layer Security (TLS) 1.0, 1.1 and 1.2 settings ARE checked 6) Click OK to close the dialog box, then relaunch JLV (The page should load) |

| Error Message/Behavior | Description/Resolution Steps |
|---|--|
| Smart Card required. | <p>WHY? Your Smart Card was not read by Windows Security and JLV before opening the JLV URL.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Close all browser sessions and browser-based applications 2) Reinsert your PIV card, and relaunch the JLV URL 3) If unsuccessful, close all open IE windows/tabs, then open IE and try JLV again |
| VERIFY CODE must be changed before continued use. | <p>WHY? Your CPRS or CAPRI Verify code has expired.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Open CPRS, VistA, or CAPRI (CAPRI-Claims users) <ol style="list-style-type: none"> a) If prompted for a PIV card certificate by CPRS, click Cancel 2) You are prompted to create a new Verify code 3) 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 10](#) summarizes system messages that may be presented to JLV users.

Table 10: 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 pages. | <p>WHY? You may be using an unsupported browser, or your screen resolution settings do not match the recommended configuration.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Access JLV using IE 11 or Chrome 2) Use a monitor with a minimum screen resolution of 1024 x 768 3) Set the browser zoom feature to 100% 4) 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. | <p>WHY? JLV is unable to retrieve the necessary data object to launch a VistA Imaging Viewer instance.</p> <p>FIX IT: Try again later; either VDS or CVIX is offline.</p> |
| MPI Error: Your query yields too many results. Please modify your search parameters to narrow the search. | <p>WHY? JLV adheres to VA guidelines and blocks search results when a search request yields more than 10 patients.</p> <p>FIX IT: Modify the information in the Patient Search dialog box using additional patient identifiers to reduce the number of results.</p> |
| MPI Error: There are no patients found using the current parameters. | <p>WHY? No patient records were found using the information entered in the Patient Search dialog box.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Verify the accuracy of the information 2) Reenter patient identifiers in the Patient Search dialog box fields |

| Error Message/Behavior | Description/Resolution Steps |
|---|--|
| <p>MPI Error: Application Reject. There was an error attempting to process your query. Please modify your search parameters and try again.</p> | <p>WHY? There may be one or more errors in the Patient Search dialog fields. FIX IT:</p> <ol style="list-style-type: none"> 1) Validate the patient identifiers, and try the search again 2) If problems persist, there may be an error between MPI and the Defense Enrollment Eligibility Reporting System (DEERS) |
| <p>MPI Error: Patient not found with search elements entered, please provide additional patient identifying information and search again.</p> | <p>WHY? No unique patient is found with the identifiers used in the search. FIX IT:</p> <ol style="list-style-type: none"> 1) Click OK to return to the Patient Search dialog 2) Provide additional patient identifiers, like the full first name or DOB |
| <p>You do not have authorization to view this record. Security regulations prohibit computer access to your own medical record.</p> | <p>WHY? VA security regulations prevent you from accessing your own medical records.</p> |
| <p>You do not have authorization to view this record. Your SSN is missing from the NEW PERSON file. Contact your ADP Coordinator.</p> | <p>WHY? Per VA policy, JLV does not allow access to patient records if the JLV user's SSN is not in their VistA profile. FIX IT: Contact your Automated Data Processing Application Coordinator (ADPAC).</p> |
| <p>An error occurred while attempting to retrieve the document.</p> | <p>WHY? This error occurs when something goes wrong when JLV tries to retrieve a selected document. FIX IT:</p> <ol style="list-style-type: none"> 1) Try again 2) If the error persists, contact local support or the ESD |
| <p>An error occurred while attempting to display the document.</p> | <p>WHY? This error occurs when JLV tries to retrieve a document but has trouble converting the document to a viewable format. FIX IT:</p> <ol style="list-style-type: none"> 1) Try again 2) If the error persists, contact local support or the ESD |
| <p>Your patient selection is limited. To access electronic health record data, please log into CAPRI.</p> | <p>WHY? Some CAPRI-Claims users have patient or site restrictions attached to their profile. FIX IT: Log into CAPRI and select the Joint Longitudinal Viewer tab to view patient records.</p> |

A. Acronyms and Abbreviations

[Table 11](#) lists the acronyms and abbreviations used throughout this document and their descriptions.

Table 11: 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 |
|----------------|---|
| 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 12](#) 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 12: 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 Diagnosis† Ward Site | Adm Date* Discharge Date Ward Provider† Diagnosis† Standardized 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† ¹⁹ Site | Scheduled Date/Time* Clinic Provider† ¹⁹ Provider Specialty† ¹⁹ Appointment Status Type Reason Site |
| Cardiology Studies—VA MUSE Only | Displays EKGs and cardiology studies with related images from all 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* ²⁰ | Reminder Site* ²⁰ |

¹⁹ Column hover display includes provider address and phone number.

²⁰ 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 |
| Consult Encounters | 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 |
| Documents | Displays documents from multiple clinical domains including radiology reports (exams), progress notes, outpatient encounters, consult encounters, 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 |
| 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 |
| 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) ²¹ |
| Inpatient Medications | Displays a patient's inpatient medications information including inpatient infusions | Order Number Drug Name*† Status Order Stop Date Site | Order Number Order Start Date Order Stop Date Drug Name*† Standardized Drug Name† Status Ordering HCP† Ordering HCP Specialty† Schedule MAH/MAL Quantity Site |

²¹ The **Immunizations** widget differentiates between the reporting site and the site of administration of a vaccine.

| Widget | Description | Minimized View | Expanded View |
|-------------------------------|--|--|--|
| Inpatient Summaries | Displays the patient's discharge summaries, history, and physical summaries | Date Note Type/Title* Site | Date Note Type/Title* Provider† Provider Specialty† ²² Location Visit/Adm Date Status Site |
| 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 |
| Orders | Displays the patient's medication, consult, radiology, and lab orders | Order Date Description*† Status/Priority Type Site | Order Date Order Number Description*† Status/Priority Start Date Stop Date Type Standardized Type† Provider† Provider Specialty† Site |
| Outpatient Encounters | Displays records of the patient's outpatient encounters | Encounter Date (Details* Note*) Clinic Provider† Diagnosis† Attachment Site | Encounter Date (Details* Note*) Clinic Status ²³ Type Provider† Provider Specialty† Reason Diagnosis† Standardized Diagnosis† Attachment Site |
| Outpatient Medications | Displays the patient's outpatient medications information, including those discontinued or expired within the past 120 days | Last Fill Drug Name*† Status Expires Site | Last Fill Drug Name*† Standardized Drug Name† Prescription Number Sig Quantity Days' Supply Refills Left* Status Ordering HCP† Ordering HCP Specialty† Expires Site |
| Problem List | Displays the patient's problem list information | Updated Date Problem Description*† ICD Type Status Linked Items ²⁴ Site | Updated Date Onset Problem Description*† Standardized Description† ICD Severity Type Status Linked Items ²⁴ Site |

²² The **Provider Specialty** column is populated with VA data only.

²³ Data in the **Status** column is populated with DOD data only.

²⁴ **Linked Items** contains DOD data only

| Widget | Description | Minimized View | Expanded View |
|---|--|---|---|
| Procedures | Displays the patient's procedures for all Current Procedural Terminology (CPT) codes | Procedure Date (Medicine Full Reports* Note[s]*) Location ²⁵ Provider† Procedure Description† Image Site ²⁶ | Procedure Date (Medicine Full Reports* Note[s]*) Location ²⁵ Provider† Provider Specialty† CPT Code ²⁷ Procedure Description† Standardized Procedure Description† Image Type Site ²⁶ |
| 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 and Deployment Assessments (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 Procedure Provider Image Site |
| Vitals | Displays the patient's vital signs information from inpatient or outpatient settings | Date Taken Type*† Result ²⁸ Converted Result ²⁹ Site | Date Taken Type*† Standardized Type† Result ²⁸ Converted Result ²⁹ Site |

²⁵ **Location** represents a ward or clinic within a given DOD or VA facility where the procedure took place.

²⁶ **Site** represents the source of procedure (i.e., VA or DOD). **Site** is different from **Location** or **Facility**.

²⁷ **CPT Code** is limited to clinically relevant medical or administrative procedure types.

²⁸ **Result** displays all results received natively as metric, received as imperial and converted to metric, and those values that are neither metric nor imperial.

²⁹ **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]).