# Veterans Health Information Exchange (VHIE) Portal Build 3.6 VHIE Portal User Guide



### Version 3.7

**August 2020**

### Department of Veterans Affairs (VA) Office of Information and Technology (OIT)

### Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Revision** | **Description** | **Author** |
| 08/27/2020 | 3.7 | Updates:   * Section [3.2](#_bookmark9): Inserted Health Information Exchange (HIE) portal new user request instructions. * Added captions to all figures throughout. * Updated document to follow current standards and style guidelines. * Reformatted content with bullet or numbered lists where appropriate. * Spelled out first occurrence of all acronyms. * Added acronyms to [Table 21](#_bookmark163). * Verified document is Section 508 conformant (e.g., added alternate text to all images, verified first table rows are repeated heading rows, etc.). | VA Tech Writer: [*REDACTED*](http://vaww.telehealth.va.gov/quality/tmp/index.asp) |
| 04/2020 | 3.6 | Updates:   * Updated language from AITC to AWS. * Update Section [3](#_bookmark6) to include instructions for requesting access to the VHIE Portal. | VHIE Agile Development |
| 03/2020 | 3.5 | Replaced screenshots to mask all data resembling PII format and structure. | VHIE Agile Development |
| 03/2020 | 3.4 | * Removed **Recent Activity** tab, **Accounting of Disclosures** tab, and the **Disclosures Detailed Report** for the current Patch 3.6 release. * Updated VHIE Portal Roles table and description in Section [4.1](#_bookmark36). to differentiate Prod and Non-Prod AD policy groups. | VHIE Agile Development |
| 03/2020 | 3.3 | Updated Section [4.1](#_bookmark36) to include description for all VHIE Roles. | VHIE Agile Development |
| 03/2020 | 3.2 | Added Section [4.1](#_bookmark36) to let ROI Operators know the appropriate VHIE Role to use when requesting access to the VHIE Portal. | VHIE Agile Development |
| 03/2020 | 3.1 | Updated Sections [4.2.2](#_bookmark45) and [4.2.3](#_bookmark47) with updated screenshots to reflect updated VA Forms for Opt-Out and Re-participation.  Updated Section 4.14.3 with updated screenshot to reflect the most recent software version. | VHIE Agile Development |

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| --- | --- | --- | --- |
| **Date** | **Revision** | **Description** | **Author** |
| 03/2020 | 3.0 | Updated Section [3](#_bookmark6) to include the Production Uniform Resource Locator (URL).  Removed/updated sub-sections under Sections [4.11](#_bookmark124) and [4.12](#_bookmark141) regarding the reports that are hidden from the GUI for the current release (Deceased Veteran Detailed, Expiring Consent Detailed, Deceased Veteran Summary, Disclosures Summary). | VHIE Agile Development |
| 12/2019 | 2.9 | Update Section [4.1](#_bookmark36) Patient Search to include expected response for loading an Inactive Patient for Build 3.1. | VHIE Agile Development |
| 09/2019 | 2.8 | Updated Section [5.1](#_bookmark160) Special Instructions for Error Correction and updated instructions for exporting to Comma-Separated Values (CSV) and Save Extensible Markup Language (XML) throughout the document. | VHIE Agile Development |
| 08/2019 | 2.7 | Updated additional language and labels for tables/figures. | VHIE Agile Development |
| 08/2019 | 2.6 | Updated based on PMO review. | VHIE Agile Development |
| 08/2019 | 2.5 | Updated UIs and content to reflect changes during Build 3. | VHIE Agile Development |
| 06/11/2019 | 2.4 | Updated content, tables, and figures to reflect Build 3 functionalities. | VHIE Agile Development |
| 04/16/2019 | 2.3 | Updated UIs and language throughout to reflect most recent design changes. | VHIE Agile Development |
| 04/05/2019 | 2.2 | Added a note in Section [4.5](#_bookmark67) to let users know Print functionality is available through the browser. | VHIE Agile Development |
| 03/15/2019 | 2.1 | Added a note under “Generate Documents” to recommend users to allow pop-ups and redirects in the browser’s setting for the VHIE Portal. | VHIE Agile Development |
| 02/28/2019 | 2.0 | Updated content, images, and document text to reflect Maintaining Internal Systems and Strengthening Integrated Outside Networks (MISSION) Act language. | VHIE Agile Development |
| 01/17/2019 | 1.0 | Initial Draft. | VHIE Agile Development |

### Artifact Rationale

Per the Veteran-focused Integrated Process (VIP) Guide, the User’s Guide is required to be completed prior to Critical Decision Point #2 (CD2), with the expectation that it will be updated as needed. A user guide is a technical communication document intended to give assistance to people using a 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. In the case of computer applications, it is usual to include screenshots of the human-machine interfaces, and hardware manuals often include clear, simplified diagrams. The language used is matched to the intended audience, with jargon kept to a minimum or explained thoroughly. The user guide is a mandatory, build-level document, and should be updated to reflect the contents of the most recently deployed build. The sections documented herein are required if applicable to your product.

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# Introduction

The Veterans Health Information Exchange (VHIE) Program was tasked by the Department of Veterans Affairs (VA) to replace the eHealth Exchange (eHX) solution with a commercial-off- the-shelf (COTS) product called the HealthShare Enterprise Platform (HEP). As part of the enhancement, HealthShare (HS) will consume legacy applications that rely on the connection with the eHX Adapter, and in this case, the Veteran Authorization and Preferences (VAP) system.

At a high-level, VAP manages a Patient’s Consent, also known as the Patient’s Participation Preferences (PPP) and the requests for generating Clinical Document Architecture (CDA)-type documents for selected Veterans, as well as generate and display Health Information Exchange (HIE) and Consent reports. To improve user experience and provide a more streamlined and robust interface, the VAP interface and functionalities will be replaced by a custom-coded interface known, henceforth, as the VHIE Portal.

## Purpose

The purpose of the VHIE Portal User Guide is to familiarize internal Veterans Health Administration (VHA) personnel and other authorized users about using the VHIE Portal interface.

# System Summary

The VHIE Portal application is hosted on Amazon Web Service (AWS). The system is only accessible within the VA intranet to authorized users. The VHIE Portal is intended for internal VHIE users to perform consent management tasks.

# Getting Started

This section describes the steps for logging in and understanding the VHIE Portal functionalities.

## VHIE Portal Roles

When requesting access to the VHIE Portal, the following VHIE Portal roles are available based on the level of access that is required.

 **NOTE:** The AD Policy Groups for the Non-Production and Production Environments are differentiated by “**NPD**” and “**PRD**” at the end of the AD Policy Group name. Operators of the system will need to submit for the “**PRD**” role when requesting access (e.g., VHIE Operators would submit for the role of “**AAC VDIF VHIE Operators PRD**”).

**Table 1: VHIE Portal Roles Description**

|  |  |  |
| --- | --- | --- |
| **Role Name** | **Role Description** | **AD Policy Groups** |
| AAC VDIF  VHIE Data Quality Reporters | These users run and view results for Data Quality Reports, and all other Reports available to the VHIE Operators, perform patient searches, as well as download the CDA documents as XML, but do not have the ability to edit consent policies. There are no specific Data Quality reports implemented in VHIE Portal currently. | * AAC VDIF VHIE Data Quality Reporters NPD * AAC VDIF VHIE Data Quality Reporters PRD |
| AAC VDIF VHIE  Operators | These users have the same access as the Veterans Data Integration and Federation (VDIF) Reporters, plus can search for patients, view patient details, retrieve CDA Patient Summary documents in HyperText Markup Language (HTML) or XML, as well as edit eHX consent policies for a Veteran (i.e., set a Veteran to opt-out or re-participate in eHX data-sharing). | * AAC VDIF VHIE Operators NPD * AAC VDIF VHIE Operators PRD |
| AAC VDIF  VHIE Portal Technical Administrators | These users are technical administrators, who have access to the full VHIE Portal site, plus technical- admin-only resources, but do not have access to any tester-only resources. For the current build, this role has the same resources as the VDIF Super User role. | * AAC VDIF VHIE Portal Tech Admin NPD * AAC VDIF VHIE Portal Tech Admin PRD |
| AAC VDIF  VHIE Portal Testers | These users have access to the full VHIE Portal site, including the tester-only resources. For the current build, only the capability to view CDA patient summary documents as XML is a tester-only resource. | * AAC VDIF VHIE Portal Testers NPD * AAC VDIF VHIE Portal Testers PRD |
| AAC VDIF VHIE  Reporters | These users run and view results for the detailed and summary reports (but cannot run an individual patient search or edit consent policies). | * AAC VDIF VHIE Reporters NPD * AAC VDIF VHIE Reporters PRD |
| AAC VDIF  VHIE Super Users | These users are administrative users at the business level, and have the same access as the VDIF Operators, plus all of the Admin reports and functions, but do not have access to the technical-admin-only resources and tester-only resources. | * AAC VDIF VHIE Super Users NPD * AAC VDIF VHIE Super Users PRD |

## VHIE Portal New User Request Instructions

This section describes how to request access to the VHIE Portal. There are two steps needed to request access to the VHIE Portal:

* [**Step 1. Complete Training**](#_bookmark10)
* [**Step 2. Submit Access Request**](#_bookmark14)

**NOTE:** If you need assistance with completing this process, please contact your supervisor/community coordinator.

### Step 1. Complete Training

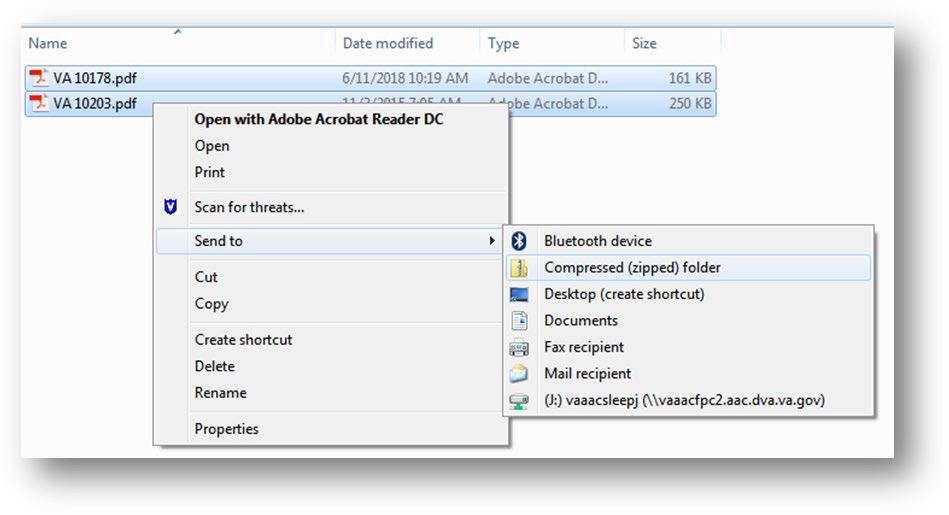
Complete required training in the VA Talent Management System (TMS):

* + - 1. Log into the [*REDACTED*](http://vaww.telehealth.va.gov/quality/tmp/index.asp)) and complete the following training or view current certificates in the “My Learning History”:

#### VA Privacy and Information Security Awareness and Rules of Behavior (VA 10176)

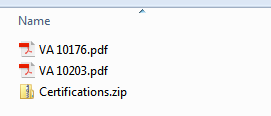
* + - * + **Privacy and HIPAA Training (VA 10203)**
      1. Save completed training certificates:

1. Save the completion certificates from both courses in a folder on your desktop.
2. Open the folder where you saved the certificates.
3. Select both certificates by holding the **CTRL** key and selecting each certificate.
4. Right click on one of the certificates and select **Send To**  **Compressed (zipped) folder**, as shown in [Figure 1](#_bookmark12):

**Figure 1: Zipping together Completed Training Certificates**

1. Name the new Zip file created in the same folder: “**Certifications.zip,**” as shown in [Figure 2](#_bookmark13):

**Figure 2: Verifying Training Certificates Zip File Name**

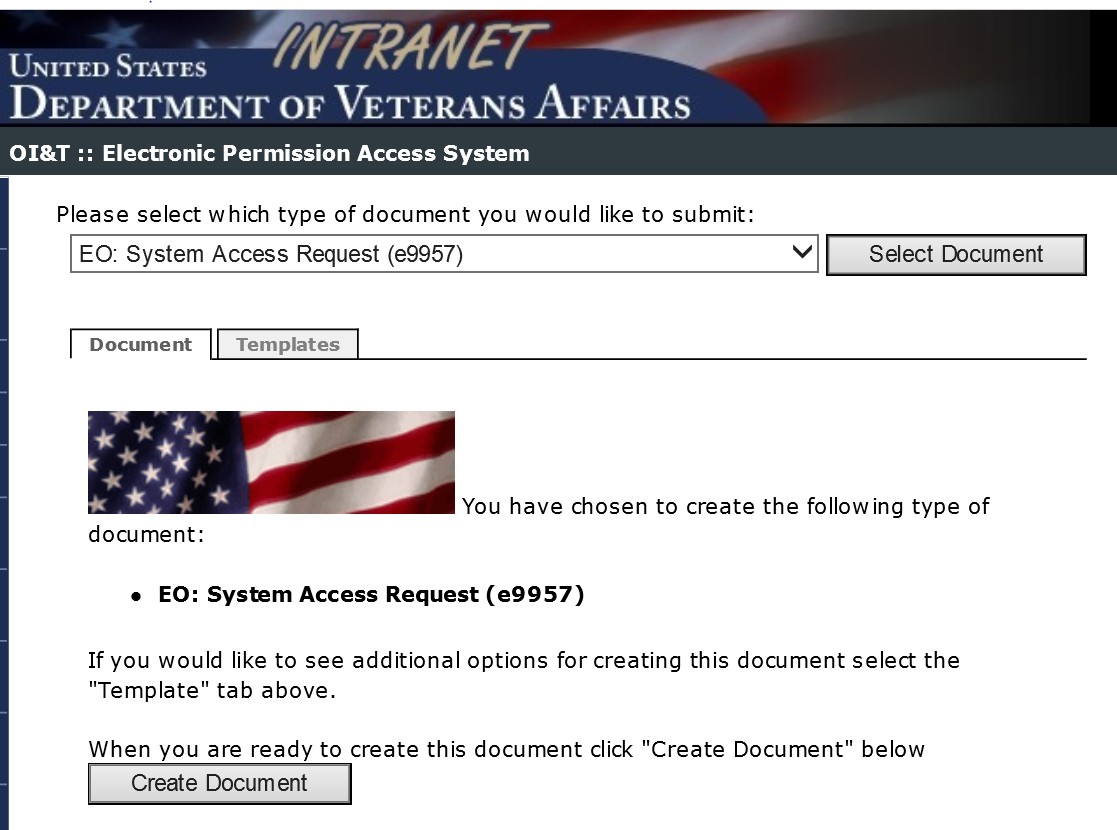


**NOTE:** You will upload this file to the Electronic Permission Access System (ePAS) request in [Step 2](#_bookmark14) of these instructions.

### Step 2. Submit Access Request

Submit an access request via OIT Electronic Permission Access System (ePAS) 9957:

* + - 1. Navigate to the Office of Information and Technology (OIT) [Electronic Permission Access System (ePAS) e9957](https://epas.r02.med.va.gov/submit.cfm?action=select&doc_type=524) page.
      2. Ensure that the “***EO: System Access Request (e9957)***” document is selected from the drop-down list, as shown in [Figure 3](#_bookmark15):

**Figure 3: Selecting the “EO: System Access Request (e9957)” Document**

* + - 1. Select **Create Document**.

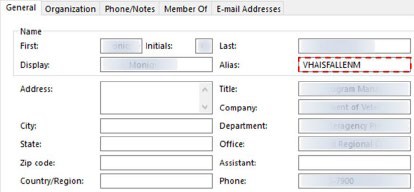
 **NOTE:** In the steps that follow, you will complete entries for the following tabs on the e9957 form in the following order:

* + - * + **Request** tab ([Step 4](#_bookmark16))
        + **Type of Access** tab ([Step 5](#_bookmark18))
        + **Comment** tab ([Step 6](#_bookmark23))

**CAUTION: Do *not* submit until all steps have been completed!**

* + - 1. From the **Request** tab, complete ***all*** required fields (yellow shading on the e9957 form), as well as the *non*-required fields (clear/white text boxes on the e9957 form) that are highlighted below:

1. Complete the “**Request**” section entries:
   * **Action: Choose** “Modification of Account”
   * **Type of Employment: choose** “VA Staff” or “Contractor”
   * **Deactivation Date:** Enter an expiration date for the access or the end date for the contract if request is for contractor staff
2. Complete the “**General Information**” section entries:
   * **Full Legal Name** (Last, First, and Middle Initial).
   * **Previous Name** (if applicable).
   * **Start Date:** Date when you started working at the VA or when your current contract started.
   * **Mailing Address:** Mailing address of the VA site where you work or the Field Office with which you are affiliated.
   * **Duty Title:** Your title.
   * **Duty Station**: Unless geographically located at one of the regional Information Technology Centers (ITC), select **Other** from the drop-down list. If **Other**, list the duty station: Enter the site/facility where you are affiliated.
   * **Company**: Enter “**Department of Veterans Affairs**” or the name of your company.
   * **Department**: Enter the identity of the VA department you support.
   * **Office**: Enter your VA office or “**100% Remote**.”
   * **Mail Code/Division**: Enter the mail code for the VA site or the field office with which you are affiliated.
   * **Phone Number**: Provide your phone number.
   * **Project/Application Code**: Enter “**VDIF**” for Veterans Data Integration & Federation program
   * **AD Username:** The Active Directory (AD) username is listed as the **Alias** in the Microsoft Outlook Global Address List (GAL) under the **General** tab, as shown in [Figure 4](#_bookmark17):

**Figure 4: Microsoft Outlook Global Address List (GAL)—General Tab**

1. Complete the “**Approver Information**” section entries:
   * **Supervisor:** Use the **“Lookup Supervisor…**” button to search for and select your immediate supervisor.
   * **Designated Approving Officer (DAO):** Use the “**Lookup DAO…**” button to search for and select your service chief.

 **NOTE:** The supervisor and DAO can be the same approver.

* + - 1. On the **Type of Access** tab, complete the following “**LAN Access**” section entries:

1. Check the **LAN and Exchange Access** checkbox, as shown in [Figure 5](#_bookmark19):

**Figure 5: LAN and Exchange Access Checkbox**

1. Update the Security Groups:
   1. Press the **Select Security Group** button.
   2. From the “**Select Security Group**” dialog in the **Search for Group** field, type “**AAC VDIF**”, as shown in [Figure 6](#_bookmark20):

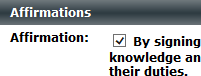
**Figure 6: Searching for “AAC VDIF” Security Groups**

* 1. Click **Search**.
  2. Select appropriate Security Group:
     + **AAC VDIF VHIE Reporters PRD—**Users run and view results for the detailed and summary reports (individual patient search or edit consent policies are *not* available.

***OR***

* + - **AAC VDIF VHIE Operators PRD**—Same access as the VDIF Reporters, plus users can search for patients, view patient details, retrieve CDA Patient Summary documents in HTML or XML, as well as edit eHX consent policies, i.e., set a Veteran to opt-out or re-participate in eHX data-sharing.
  1. Click **OK**.

1. Scroll to the bottom of the page and complete the “**Affirmations**” dialog entries. Check the “**Affirmation**” checkbox, as shown in [Figure 7](#_bookmark21):

**Figure 7: Affirmations Dialog—Signing Document**

1. Complete the **“Security and Privacy**” dialog entries ([Figure 8](#_bookmark22)):
   1. Select **Browse.**
   2. Locate and attach the ZIP file containing certificates that you created in [Step 2](#_bookmark11).
   3. Enter the date of your last “Rules of Behavior” training. To ensure the date is entered correctly, use the “calendar” icon to select the date.

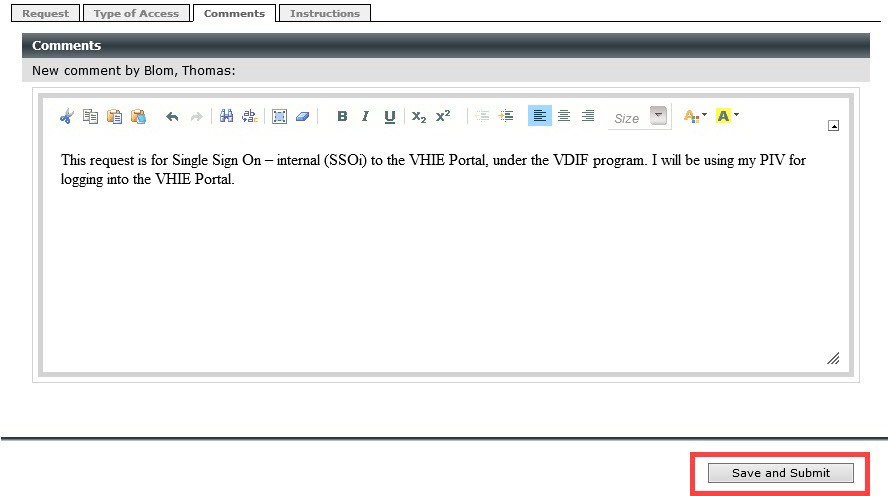
**Figure 8: Security and Privacy Dialog Entries**

* + - 1. On the **Comments** tab, do the following:

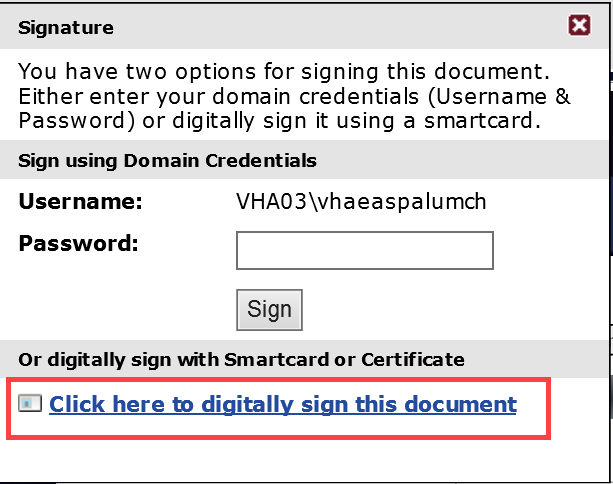
1. Type the following text into the “**Comments**” box, as shown in [Figure 9](#_bookmark24):

#### This request is for Single Sign On – internal (SSOi) to the VHIE Portal, under the VDIF program. I will be using my PIV for logging into the VHIE Portal.

**Figure 9: Entering Comment Text**



1. Select the **Save and Submit** button, see [Figure 9.](#_bookmark24)
2. If prompted with the “Signature” dialog pop-up, as shown in [Figure 10,](#_bookmark25) do the following:
   1. Select the **Click here to digitally sign this document** link.
   2. When prompted, enter your Personal Identity Verification (PIV) smart card pin.

**Figure 10: Apply Digital Signature**

## Log in Via SSOi

Take the following steps to log in via Single Sign On – internal (SSOi):

 **NOTE**: Once integrated with SSOi, users will only use their PIV card for login per VA’s HSPD-12 implementation of mandatory PIV, unless a special exemption is permitted, and the user requires a VA username and password.

**Table 2: Log in via SSOi**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | Navigate to the “**VHIE Portal Login**” screen at [*REDACTED*](http://vaww.telehealth.va.gov/quality/tmp/index.asp)  Note  **NOTE**: If presented with the website’s security certificate error ([Figure 11](#_bookmark28)), select “**Continue to this website (not recommended)**”.  **Figure 11: Sample Error Message—Problem with Website's Security Certificate** |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | Log in using your PIV card ([Figure 12](#_bookmark29)).  **Figure 12: “VA Single Sign-On” Screen (PIV Card)**  VA Single Sign-OnŽ Screen (PIV Card) |
| 3. | Select the appropriate certificate and select **OK**.  Note  **NOTE:** Always select the second certificate as the authentication certificate ([Figure 13](#_bookmark30)). If you see more than two certificates displayed, make sure to clear your browser’s cached certificates under **Internet Tools**.  **Figure 13: Windows Security—"Select a Certificate” Screen**  Windows Security„"Select a Certificate" Screen |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 4. | Enter the PIN associated with your PIV card and select **OK** ([Figure 14](#_bookmark31)).  **Figure 14: ActivClient Login—PIV PIN Pop-Up Screen** |
| 5. | Arrive at the “**VHIE Portal**” Landing Page ([Figure 15](#_bookmark32)).  **Figure 15: VHIE Portal—Landing Page**  VHIE Portal„Landing Page |

## Understanding the Functionalities

The VHIE Portal provides the following functionalities:

* “VHIE Portal” Landing Page
* Patient Search
* View Patient Demographic Details
* Participation Preference: Patient Not Participating
* Participation Preference: Patient Re-participate
* Deceased Patient Notification Message
* View or Add Patient Comments
* Generate Documents (CDA-type Health Documents)
* View Patient’s VA Treatment Facilities
* Search Menu – Return to Patient Search
* Report Menu – Consent Activity Dashboard
* Report Menu – User Activity Dashboard
* Report Menu – Detailed HIE and Consent Reports
* Report Menu – Summary HIE and Consent Reports
* Admin Menu – View or Modify Partner Organization(s) List
* Admin Menu – View or Modify Facilities List
* Welcome Menu – Set or Update User’s Default Facility
* Welcome Menu – Access User Guide
* Welcome Menu – View System Software Information

## Exit System

Log out of the VHIE Portal by selecting the **Logout** option under the **Welcome** menu at the top of the screen.

# Using the Software

This section describes how to use the application with the following assumed experience/skills of the audience:

* Users have basic knowledge of the operating system (such as the use of commands, menu options, and navigation tools).
* Users are using the VHIE Portal to do their jobs.
* Users have been provided active roles and access to the VHIE Portal.
* Users have completed any prerequisite training.

Consult your supervisor or the VA Help Desk if you need help meeting any of the above conditions.

## Patient Search

The Patient Search allows for a VHIE user to search by the following patient identifiers:

* Social Security Number (SSN)
* First Name
* Last Name.

### Prerequisite

The user has logged in via SSOi or another VA-approved method for authentication.

**Table 3: Patient Search**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | Complete the **Social Security Number**, **First Name**, and **Last Name** fields, and then select  **Search** ([Figure 16](#_bookmark39)).  Note  **NOTE**: The **Social Security Number**, **First Name**, and **Last Name** fields are all required fields. The **Social Security Number** field accepts numeric characters with and without dashes (e.g., **xxx-xxx-xxxx** and **xxxxxxxxxx**).  **Figure 16: VHIE Portal—"Patient Search” Screen**  VHIE Portal„"Patient Search" Screen |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | Form validation is enforced to ensure that users complete each field in the correct format ([Figure](#_bookmark40) [17](#_bookmark40)).  **Figure 17: VHIE Portal—"Patient Search” Screen: Field Validation** |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 3. | A progress bar will display to indicate that a patient search is processing ([Figure 18](#_bookmark41)).  **Figure 18: VHIE Portal—“Patient Search” Screen: Data Entries (Masked) and Progress Status Bar** |
| VHIE Portal„Patient SearchŽ Screen: Data Entries (Masked) and Progress Status Bar |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 4. | If the patient’s record has *not* been loaded from the Legacy system, a notification message will display for the user to try the search again later ([Figure 19](#_bookmark42)).  **Figure 19: VHIE Portal—Notification Message: Patient Loading and to Try Search Later** |
| VHIE Portal„Notification Message: Patient Loading and to Try Search Later |

## Patient Detail Summary

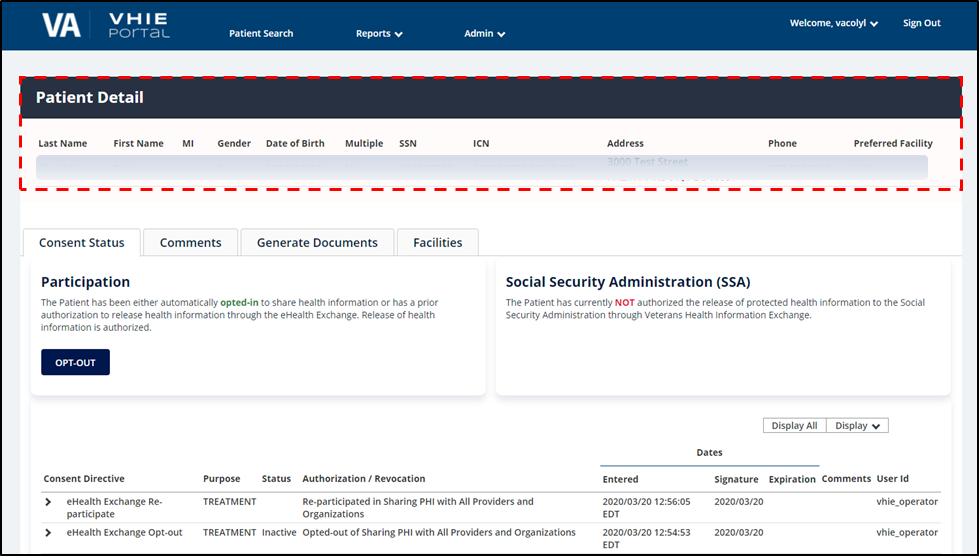
After retrieving a record from a patient search, the VHIE user will be able to view the patient’s demographic details and perform various patient-centric tasks, depending on the role(s) assigned to the VHIE user.

### Prerequisite

* The user has logged in via SSOi or another VA-approved method for authentication.
* The user has successfully retrieved a record from a Patient Search.

### View Patient Demographic Details

The patient’s demographic details will be displayed at the top of the screen (if available) for the VHIE user to view, as shown in [Figure 20](#_bookmark46):

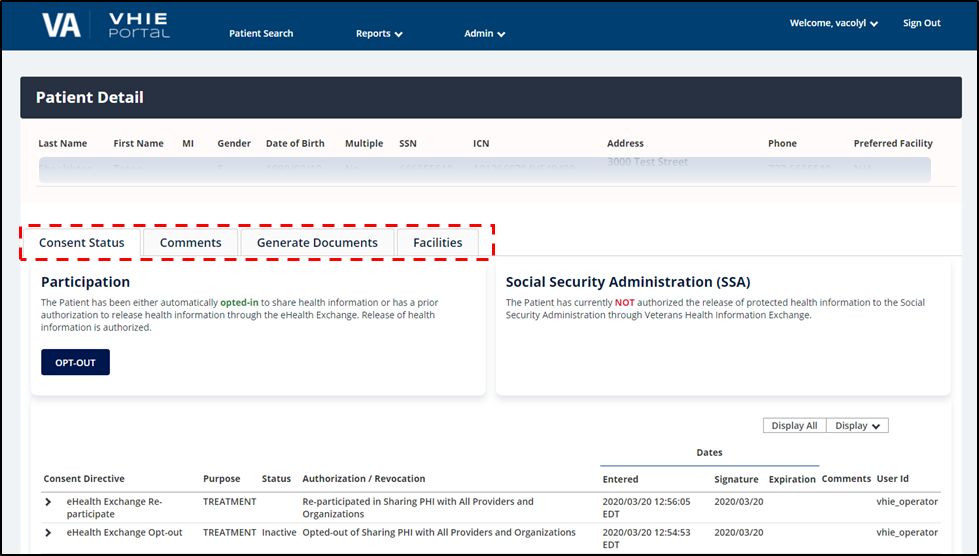
**Figure 20: VHIE Portal—"Patient Detail” Screen: Patient Demographic Details**

### Patient-Centric Functions

The following functional tabs ([Figure 21](#_bookmark48)) allow the VHIE user to navigate to different pages to perform various tasks and retrieve important information on the patient:

#### Consent Status

* **Comments**
* **Generate Documents** (CDA-type Health Documents)
* **Facilities** (Patient’s VA Treatment Facilities)

**Figure 21: VHIE Portal—"Patient Detail” Screen: Patient-Centric Information Tabs**

## Consent Status Tab

The **Consent Status** tab displays status information about the patient’s participation preferences for:

* Health Treatment
* Social Security Administration (SSA)-authorization for Coverage
* Historical participation preference information

The “**Consent Status**” page also allows the VHIE user to initiate the workflows to process the patient’s preference to either participate or not participate in sharing of health information for treatment.

### Prerequisite

* The user has logged in via SSOi or another VA-approved method for authentication.
* The user has successfully retrieved a record from a patient search.

### Participation Preference: Opt-Out of Sharing (Not Participating)

If the patient is currently participating in the sharing of Health information, a VHIE user can take the following steps to update the patient’s consent status so that the patient is opted-out of sharing.

#### Prerequisite

* + - * + The user has logged in via SSOi or another VA-approved method for authentication.
        + The user has successfully retrieved a record from a Patient Search.
        + The Patient has an opt-in consent status.

**Table 4: Patient Opt-Out of Sharing**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | If the Veteran is currently participating in sharing, there will be an **Opt-Out** button under the “**Participation**” section ([Figure 22](#_bookmark53)). Select the **Opt-Out** button to open the participation form and fill out the required information.  **Figure 22: VHIE Portal—"Patient Detail” Screen: Opt-Out Button**  VHIE Portal„"Patient Detail" Screen: Opt-Out Button |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | Complete the required information fields and select the **Save** button to update the Veteran’s participation status ([Figure 23](#_bookmark54)).  **Figure 23: VHIE Portal—"Opt-Out of Sharing” Screen** |
|  |

### Participation Preference: Patient Re-Participate in Sharing

If the patient is currently opted-out of sharing, a VHIE user can take the following steps to change the patient’s consent status so that the patient is opted-in for sharing.

#### Prerequisite

* + - * + The user has logged in via SSOi or another VA-approved method for authentication.
        + The user has successfully retrieved a record from a Patient Search.
        + The Patient has an opt-out consent status.

**NOTE**: If the patient has an explicitly opted-out (*not* participating) preference in the legacy system, the opt-out preference is honored in HealthShare. A message will also display under the patient’s “**Detail**” section to notify the user of the patient’s “**Not Participating**” preference.

**Table 5: Patient Re-Participate in Sharing**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | If the veteran is currently *not* participating in sharing, there will be an **Opt-In** button under the “**Participation**” section ([Figure 24](#_bookmark57)). Select the **Opt-In** button to open the participation form and fill out the required information.  **Figure 24: VHIE Portal—“Patient Detail”: Opt-In Button**  VHIE Portal„Patient DetailŽ: Opt-In Button |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | Complete the required information fields, then select the **Save** button to update the Veteran’s participation status ([Figure 25](#_bookmark58)).  **Figure 25: VHIE Portal—“Reparticipate in Sharing” Screen** |

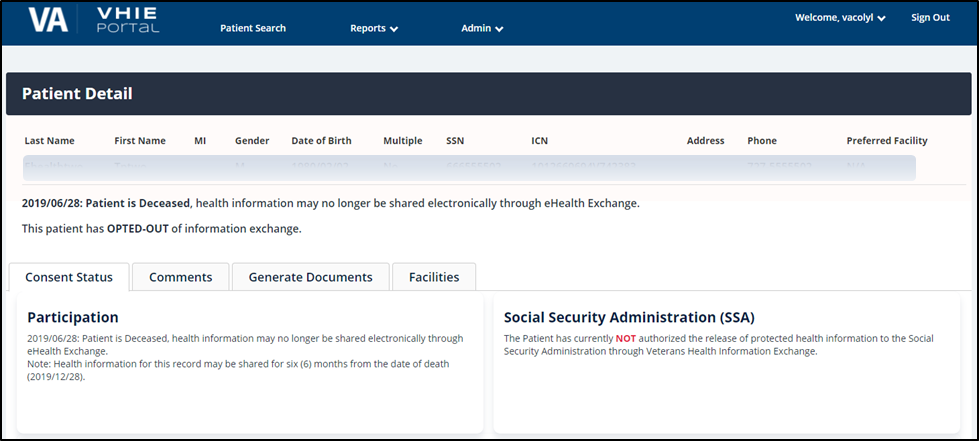
### Deceased Patient Notification Message

If the Patient is deceased, a message will display in the “**Patient Detail**” and “**Participation**” sections ([Figure 26](#_bookmark60)) to notify the user that the patient is deceased.

 **NOTE:** If the deceased patient had a Participate in Sharing Preference for Treatment, this preference will be honored for a period of **six** (**6**) months from the date of death.

#### Prerequisite

* + - * + The user has logged in via SSOi or another VA-approved method for authentication.
        + The user has successfully retrieved a record from a Patient Search.

**Figure 26: VHIE Portal—“Patient Detail” Screen: Deceased Veteran Notification Message**

## Comments Tab

A VHIE user can select the **Comments** tab to view or add general comments about the patient.

### Prerequisite

* + - * The user has logged in via SSOi or another VA-approved method for authentication.
      * The user has successfully retrieved a record from a Patient Search.

**Table 6: View/Add Patient Comments**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | To add a comment, under the **Comments** tab, select **Add Comment** ([Figure 27](#_bookmark64)).  **Figure 27: VHIE Portal—“Patient Detail” Screen: Add Comment Button**  VHIE Portal„Patient DetailŽ Screen: Add Comment Button |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | Complete the **Add Comment** field and select the **Post Comment** button to submit comment ([Figure 28](#_bookmark65)).  **Figure 28: VHIE Portal—“Patient Detail” Screen: Adding Comments**  VHIE Portal„Patient DetailŽ Screen: Adding Comments |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 3. | The most current comment will display as the top comment ([Figure 29](#_bookmark66)).  Note  **NOTE**: Comments posted in this area are only viewable in VHIE Portal.  **Figure 29: VHIE Portal—“Patient Detail” Screen: Viewing Comments**  VHIE Portal„Patient DetailŽ Screen: Viewing Comments |

## Generate Documents Tab

A VHIE user can select the **Generate Documents** tab in the “**Patient Detail**” page to generate the following documents:

#### CCD v1.1

* **CCD v2.1**

#### C32

* **C62**
* Single Encounter Summary (SES)

### Prerequisite

* + - * The user has logged in via SSOi or another VA-approved method for authentication.
      * The user has successfully retrieved a record from a Patient Search.

#### NOTE:

1. When generating a **CCD v1.1**, **CCD v2.1**, or **C32**, the artifact is generated in a new browser window.
2. When generating a **C62** or SES, the results may return multiple documents and the user can choose which **C62** or SES documents to view.
3. If the user experiences any issues with generating a document, it is recommended to configure the browser’s security and privacy settings for the VHIE Portal to allow pop- ups and redirects.

If generating a **C62**, use the Google Chrome web browser for best result. Contents of the **C62** text note are **base64** encoded, requiring the browser to translate the data link Uniform Resource Locator (URL), which IE is *not* doing for the **C62**.

1. To print the CDA-type document, the user can use the browser’s built-in Print functionality to either print or do a print preview.

**Table 7: Generate CCD 1.1, CCD 2.1, and C32**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | Under the **Generate Documents** tab, select **CCD 1.1**, **CCD 2.1**, or **C32** as the **Document Type**  and select **Generate** ([Figure 30](#_bookmark70)).  **Figure 30: VHIE Portal—Generate Documents Tab: Generate CCD 1.1, CCD 2.1, and C32**  VHIE Portal„Generate Documents Tab: Generate CCD 1.1, CCD 2.1, and C32 |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | If available, the selected health document ([Figure 31](#_bookmark71)) will generate in a new browser window.  **Figure 31: Sample Health Summary Document**  Sample Health Summary Document |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 3. | To download the **CCD 1.1**, **CCD 2.1**, or **C32** as an XML, select the document under the  **Document Type** field and select **Save XML** ([Figure 32](#_bookmark72)).  **Figure 32: VHIE Portal—Generate Documents Tab: Saving CCD 1.1 as XML File**  VHIE Portal„Generate Documents Tab: Saving CCD 1.1 as XML File |
| 4. | The user will be prompted to save the file as an XML Document. Select the appropriate save location and select **Save** ([Figure 33](#_bookmark73)).  **Figure 33: Sample Dialog to Save XML Document** |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 5. | If using Google Chrome as the browser, the user *must* open the saved file using Google Chrome or another XML viewer application (e.g., Microsoft [MS] Edge or Notepad), see [Figure](#_bookmark74) [34](#_bookmark74).  Note  **NOTE**: If the user is using Internet Explorer (IE) as the browser when downloading the XML, this step is *not* necessary as IE is used as the default browser for the XML viewer.  For more information, see Section [5](#_bookmark159), “[Troubleshooting](#_bookmark159).”  **Figure 34: Selecting Tool to Open XML File**  Selecting Tool to Open XML File  "Open with" screenshot for Google Chrome, Microsoft Edge and Notepad highlighted. |

**Table 8: Generate C62 and SES**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | Under the **Generate Documents** tab, select either **C62** or **Encounter Summary** as the  **Document Type** and select **Generate** ([Figure 35](#_bookmark76)).  Note  **NOTE**: If generating a **C62**, use the Google Chrome web browser for best result. Contents of the **C62** text note are **base64** encoded, requiring the browser to translate the data link URL, which IE is *not* doing for the **C62**.  **Figure 35: VHIE Portal—Generate Documents Tab: Generating a C62 File**  VHIE Portal„Generate Documents Tab: Generating a C62 FIle |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | If multiple documents are returned, select **View Document** to generate the appropriate document or select **Save XML** to download and save the XML ([Figure 36](#_bookmark77)).  Note  **NOTE**: **View Document** will open the document in a new browser window and **Save XML**  will prompt the user to save the file as an XML document.  **Figure 36: VHIE Portal—Generate Documents Tab: Reviewing Documents**  VHIE Portal„Generate Documents Tab: Reviewing Documents |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 3. | When downloading the XML, Save the file as an **XML** type ([Figure 37](#_bookmark78)).  **Figure 37: Downloading and Saving XML File**  Downloading and Saving XML File |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 4. | If using Google Chrome as the browser, the user *must* open the saved file using Google Chrome or another XML viewer application (e.g., MS Edge or Notepad), see [Figure 38](#_bookmark79).  Note  **NOTE**: If the user is using IE as the browser when downloading the XML, this step is *not* necessary as IE is used as the default browser for the XML viewer. For more information, see Section [5](#_bookmark159), “[Troubleshooting](#_bookmark159).”  **Figure 38: Selecting Tool to Open XML File**  Selecting Tool to Open XML File  "Open with" screenshot highlighting Google Chrome, Microsoft Edge, or Notepad. |

## Facilities Tab

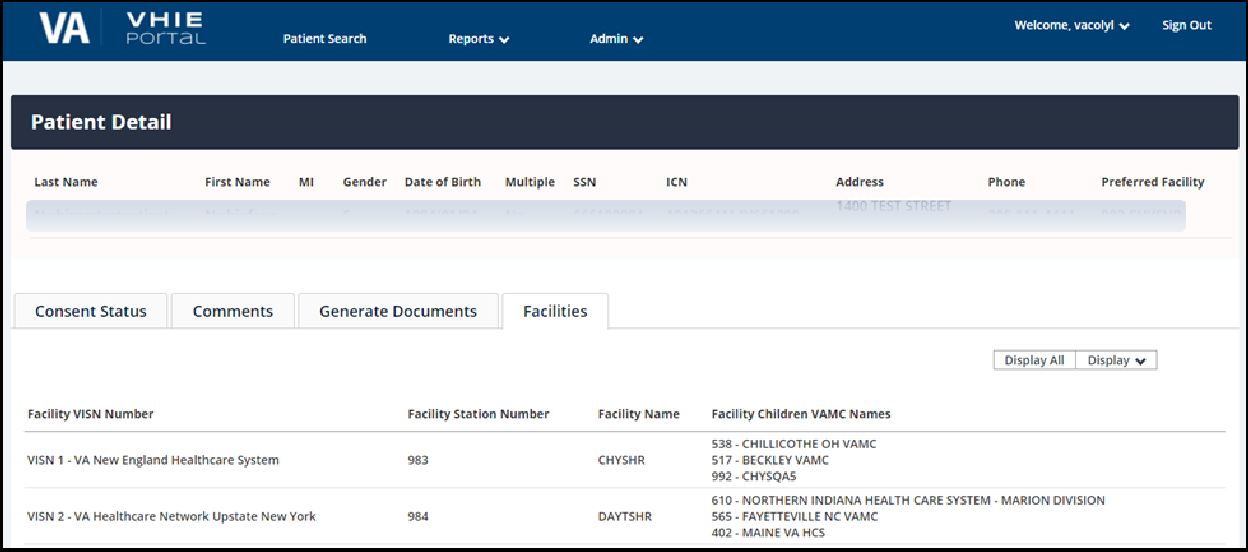
A VHIE user can select the **Facilities** tab in the “**Patient Detail**” page ([Figure 39](#_bookmark82)) to view the Patient’s VA Treatment Facilities.

 **NOTE**: The Patient’s VA Treatment Facilities information under the **Facilities** tab is read-only.

### Prerequisite

* + - * The user has logged in via SSOi or another VA-approved method for authentication.
      * The user has successfully retrieved a record from a Patient Search.

**Figure 39: VHIE Portal—Facilities Tab: View Patient's Treatment Facilities**

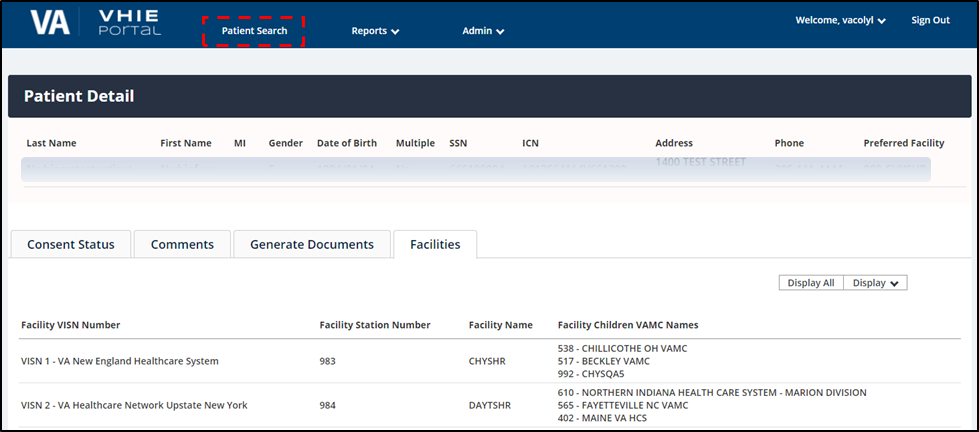


## Search Menu—Return to Patient Search

From within the VHIE Portal, a VHIE user can select the **Patient Search** option at the top of the web page ([Figure 40](#_bookmark85)) to return to the default “**Patient Search**” page.

### Prerequisite

* + - * The user has logged in via SSOi or another VA-approved method for authentication.
      * The user has successfully retrieved a record from a **Patient Search**.

**Figure 40: VHIE Portal—Return to Patient Search**

## Reports—Dashboard Widgets

From within the VHIE Portal, a VHIE user can select the **Reports** option at the top of the web page ([Figure 41](#_bookmark89)) to select and generate either of the following dashboards:

* **Consent Activity Dashboard—**Displays the number of web calls made to the VHIE Portal within the past **24-hours**.
* **User Activity Dashboard—**Displays the number of user logins to the VHIE Portal within the past **24-hours**.

### Prerequisite

* + - * The user has logged in via SSOi or another VA-approved method for authentication.
      * The user has been assigned the appropriate roles to generate VHIE reports.

**Table 9: Reports - Dashboard Widgets**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | To generate the **Consent Activity Dashboard**, under the **Reports** menu, select  **Consent Activity Dashboard** ([Figure 41](#_bookmark89)).  **Figure 41: VHIE Portal—Selecting Consent Activity Dashboard Report**  VHIE Portal„Selecting Consent Activity Dashboard Report |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | If there have been web calls made to the VHIE Portal application for consent activities within the past **24-hours**, the information will display in the generated graph ([Figure](#_bookmark90) [42](#_bookmark90)).  **Figure 42: Consent Activity Dashboard—Sample Web Calls within 24 Hours Report** |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 3. | To generate the **User Activity Dashboard**, under the **Reports** menu, select **User Activity Dashboard** ([Figure 43](#_bookmark91)).  **Figure 43: VHIE Portal—Selecting User Activity Dashboard Report**  VHIE Portal„Selecting User Activity Dashboard Report |
| 4. | If any user accounts were logged into the VHIE Portal application within the past **24- hours**, the information will display in the generated graph ([Figure 44](#_bookmark92)).  **Figure 44: User Activity Dashboard—Sample User Logins within Past 24 Hours Report** |

## Reports—Detailed HIE and Consent Reports

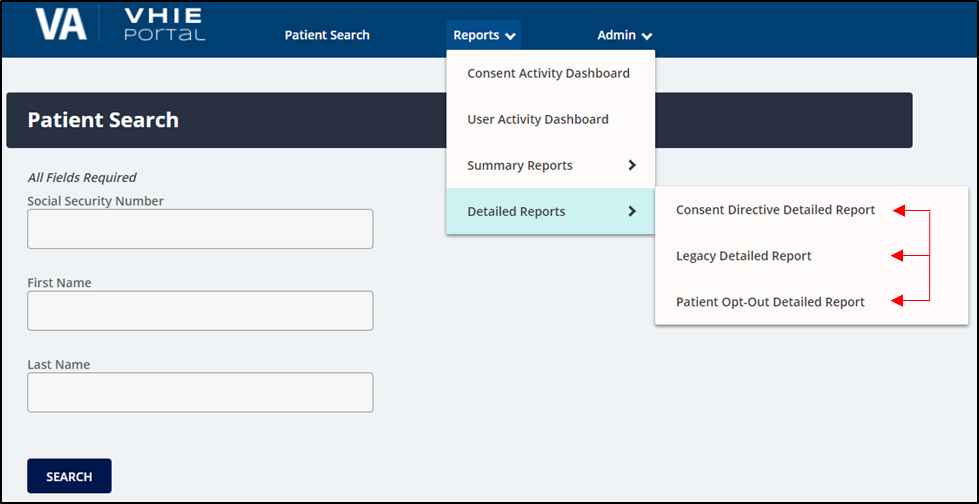
From within the VHIE Portal, a VHIE user can select the **Reports** option at the top of the web page ([Figure 45](#_bookmark95)) to select and generate the Detailed HIE and Consent Reports. The Detailed HIE and Consent Reports includes the following:

#### Consent Directive Detailed Report

* **Legacy Detailed Report**
* **Patient Opt-Out Detailed Report**

### Prerequisite

* + - * The user has logged in via SSOi or another VA-approved method for authentication.
      * The user has been assigned the appropriate roles to generate VHIE reports.

**Figure 45: Detailed Reports Menu—Selecting Detailed HIE and Consent Reports**

### Consent Directive Detailed Report

The **Consent Directive Detailed Report** provides a detailed listing of specified "participate in sharing" and "opt-out of sharing" activities for one or more patients for a selected range of dates at selected VA Authenticating facilities.

**Table 10: Consent Directive Detailed Report**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | From the **Reports** menu, select **Detailed Reports**, and then select **Consent Directive Detailed Report** ([Figure 46](#_bookmark98)).  **Figure 46: Detailed Reports Menu—Selecting Consent Directive Detailed Report**  Detailed Reports Menu„Selecting Consent Directive Detailed Report |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | Complete the appropriate search criteria, then select **Search** ([Figure 47](#_bookmark99)).  **Figure 47: Consent Directive Detailed Report—Selecting Search Criteria**  Consent Directive Detailed Report„Selecting Search Criteria |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 3. | In the returned results, the user can export the report to a **.CSV** (Comma-Separated Values) file by selecting **Export CSV** ([Figure 48](#_bookmark100)).  **Figure 48: Sample Consent Directive Detailed Report—Exporting to a CSV File**  Sample Consent Directive Detailed Report„Exporting to a CSV File |

### Legacy Detailed Report

The **Legacy Detailed Report** shows historical consent data of the Patient’s Participation Preferences (PPP; legacy opt-in and opt-out consent policies), prior to the Maintaining Internal Systems and Strengthening Integrated Outside Networks (MISSION) Act.

**Table 11: Legacy Detailed Report**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | From the **Reports** menu, select **Detailed Reports**, and then select **Legacy Detailed Report**  ([Figure 49](#_bookmark103)).  **Figure 49: Detailed Reports Menu—Selecting Legacy Detailed Report**  Detailed Reports Menu„Selecting Legacy Detailed Report |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | Complete the appropriate search criteria, then select **Search** ([Figure 50](#_bookmark104)).  **Figure 50: Legacy Detailed Report—Selecting Search Criteria**  Legacy Detailed Report„Selecting Search Criteria |
| 3. | In the returned results, the user can export the report to a **.CSV** file by selecting **Export CSV**  ([Figure 51](#_bookmark105)).  **Figure 51: Sample Legacy Detailed Report—Exporting to a CSV File**  Sample Legacy Detailed Report„Exporting to a CSV File |

### Patient Opt-Out Detailed Report

The **Patient Opt-Out Detailed Report** provides a detailed listing of patients that are opt-out of sharing.

**Table 12: Patient Opt-Out Detailed Report**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | From the **Reports** menu, select **Detailed Reports**, and then select **Patient Opt-Out Detailed Report** ([Figure 52](#_bookmark108)).  **Figure 52: Detailed Reports Menu—Selecting Patient Opt-Out Detailed Report**  Detailed Reports Menu„Selecting Patient Opt-Out Detailed Report |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | Complete the appropriate search criteria, and then select **Search** ([Figure 53](#_bookmark109)).  **Figure 53: Patient Opt-Out Detailed Report—Selecting Search Criteria**  Patient Opt-Out Detailed Report„Selecting Search Criteria |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 3. | In the returned results for the **Patient Opt-Out Detailed Report** ([Figure 54](#_bookmark110)), the user can:   1. **Export** the report to a **.CSV** file by selecting **Export CSV**. 2. **View** the SSA Portable Document Format (PDF) by selecting the **View** button next to the SSA consent.   **Figure 54: Sample Patient Opt-Out Detailed Report—Export and View Options**  Sample Patient Opt-Out Detailed Report„Export and View Options |

## Reports—Summary HIE and Consent Reports

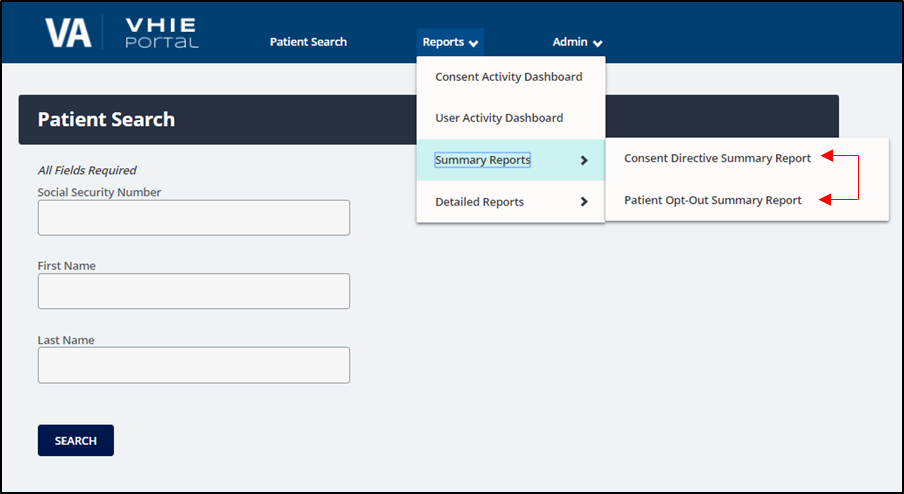
From within the VHIE Portal, a VHIE user can select the **Reports** option at the top of the web page ([Figure 55](#_bookmark113)) to select and generate the Summary HIE and Consent Reports. The Summary HIE and Consent Reports includes the following:

#### Consent Directive Summary Report

* **Patient Opt-Out Summary Report**

### Prerequisite

* + - * The user has logged in via SSOi or another VA-approved method for authentication.
      * The user has been assigned the appropriate roles to generate VHIE reports.

**Figure 55: Reports Menu—Summary HIE and Consent Reports**

### Consent Directive Summary Report

The **Consent Directive Summary Report** provides a summary listing of the selected Consent Directive totals for a selected range of dates at the selected Authenticating facility or facilities.

**Table 13: Consent Directive Summary Report**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | From the **Reports** menu, select **Consent Directive Summary Report** ([Figure 56](#_bookmark116)).  **Figure 56: Summary Reports Menu—Selecting Consent Directive Summary Report**  Summary Reports Menu„Selecting Consent Directive Summary Report |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | Complete the appropriate search criteria, and then select **Search** ([Figure 57](#_bookmark117)).  **Figure 57: Consent Directive Summary Report—Selecting Search Criteria**  Consent Directive Summary Report„Selecting Search Criteria |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 3. | In the returned results, the user can export the report to a **.CSV** file by selecting **Export CSV**  ([Figure 58](#_bookmark118)).  **Figure 58: Sample Consent Directive Summary Report—Exporting to a CSV File**  Sample Consent Directive Summary Report„Exporting to a CSV File |

### Patient Opt-Out Summary Report

The **Patient Opt-Out Summary Report** provides a summary listing of patients that are opt-out of sharing.

**Table 14: Patient Opt-Out Summary Report**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | From the **Reports** menu, select **Patient Opt-Out Summary Report** ([Figure 59](#_bookmark121)).  **Figure 59: Summary Reports Menu—Selecting Patient Opt-Out Summary Report**  Summary Reports Menu„Selecting Patient Opt-Out Summary Report |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | Complete the appropriate search criteria, and then select **Search** ([Figure 60](#_bookmark122)).  **Figure 60: Patient Opt-Out Summary Report—Selecting Search Criteria**  Patient Opt-Out Summary Report„Selecting Search Criteria |

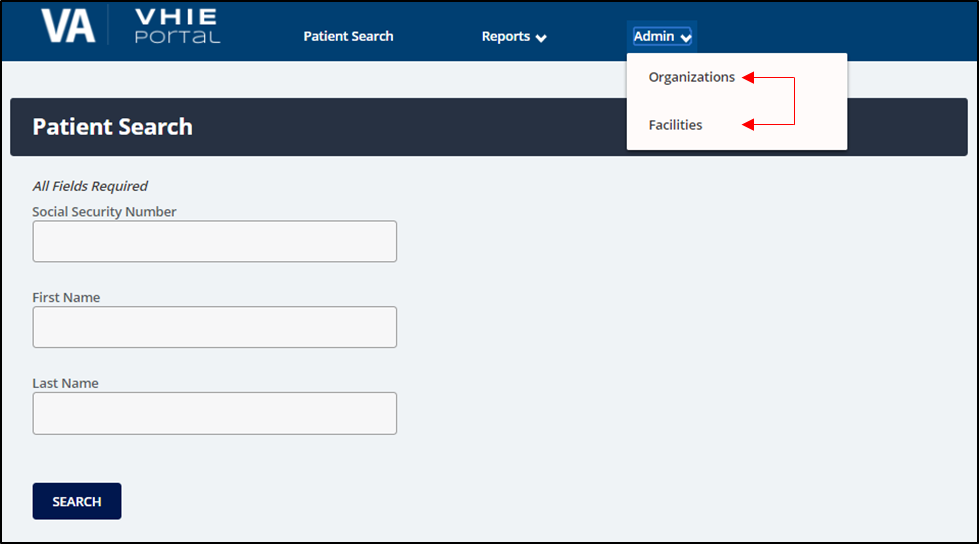
|  |  |
| --- | --- |
| **Step** | **Action** |
| 3. | In the returned results, the user can export the report to a **.CSV** file by selecting **Export CSV**  ([Figure 61](#_bookmark123)).  **Figure 61: Sample Patient Opt-Out Summary Report—Exporting to a CSV File**  Sample Patient Opt-Out Summary Report„Exporting to a CSV File |

## Admin Menu—Partner Organizations and Facilities List

From within the VHIE Portal, a VHIE user can select **Admin** at the top of the web page ([Figure](#_bookmark126) [62](#_bookmark126)) to access and modify the list of Partner Organizations and Facilities.

### Prerequisite

* + - * The user has logged in via SSOi or another VA-approved method for authentication.
      * The user has been assigned the appropriate roles to access and modify the list of Partner Organizations and VA Facilities.

**Figure 62: Admin Menu—Partner Organizations and Facilities List**

### Access or Modify Partner Organizations List

The VHIE admin user can access the list of Partner Organizations to view, edit, delete, or add new organizations.

#### Prerequisite

* + - * + The user has logged in via SSOi or another VA-approved method for authentication.
        + The user is provided with elevated admin privileges to access and modify the list of Partner Organizations.

**Table 15: Access or Modify Partner Organizations List**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | From the **Admin** menu, select **Organizations** ([Figure 63](#_bookmark129)).  **Figure 63: Admin Menu—Selecting Organizations**  Admin Menu„Selecting Organizations |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | To add a new Partner Organization, select **Add Partner Organization** ([Figure 64](#_bookmark130)).  **Figure 64: Partner Organizations—Adding a New Partner Organization**  Partner Organizations„Adding a New Partner Organization |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 3. | Complete the appropriate required fields, and then select **Save** to add the new Partner Organization ([Figure 65](#_bookmark131)).  **Figure 65: Add Partner Organization—Entering Required Fields and Saving New Partner Organization**  Add Partner Organization„Entering Required Fields and Saving New Partner Organization |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 4. | To edit or delete an existing Partner Organization, select the targeted organization name ([Figure](#_bookmark132) [66](#_bookmark132)).  **Figure 66: Partner Organizations—Selecting an Existing Partner Organization**  Partner Organizations„Selecting an Existing Partner Organization |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 5. | Complete the appropriate required fields and select **Save** to edit the organization or select  **Delete** to remove the organization from the list ([Figure 67](#_bookmark133)).  **Figure 67: Edit Partner Organizations—Editing Required Fields and Saving Changes or Deleting a Partner Organization**  Edit Partner Organizations„Editing Required Fields and Saving Changes or Deleting a Partner Organization |

### Access or Modify Facilities List

The VHIE admin user can access the list of VA Facilities to view, edit, delete, or add new facilities.

#### Prerequisite

* + - * + The user has logged in via SSOi or another VA-approved method for authentication.
        + The user is provided with elevated admin privileges to access and modify the list of VA Facilities.

**Table 16: Access or Modify Facilities List**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | From the **Admin** menu, select **Facilities** ([Figure 68](#_bookmark136)).  **Figure 68: Admin Menu—Selecting Facilities**  Admin Menu„Selecting Facilities |
| 2. | To add a new VA Facility, select **Add Facility** ([Figure 69](#_bookmark137)).  **Figure 69: Facilities—Adding a New Facility**  Facilities„Adding a New Facility |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 3. | Complete the appropriate required fields, then select **Save** to add the new VA Facility ([Figure](#_bookmark138) [70](#_bookmark138)).  **Figure 70: Add Facility—Entering Required Fields and Saving New VA Facility**  Add Facility„Entering Required Fields and Saving New VA Facility |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 4. | To edit or delete an existing VA Facility, select the targeted facility name ([Figure 71](#_bookmark139)).  **Figure 71: Facilities—Selecting an Existing Facility**  Edit or delete existing VA facility screenshot |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 5. | Complete the appropriate required fields and select **Save** to edit the facility or select **Delete** to remove the facility from the list ([Figure 72](#_bookmark140)).  **Figure 72: Edit Facility—Editing Required Fields and Saving Changes or Deleting a Facility**  Edit Facility„Editing Required Fields and Saving Changes or Deleting a Facility |

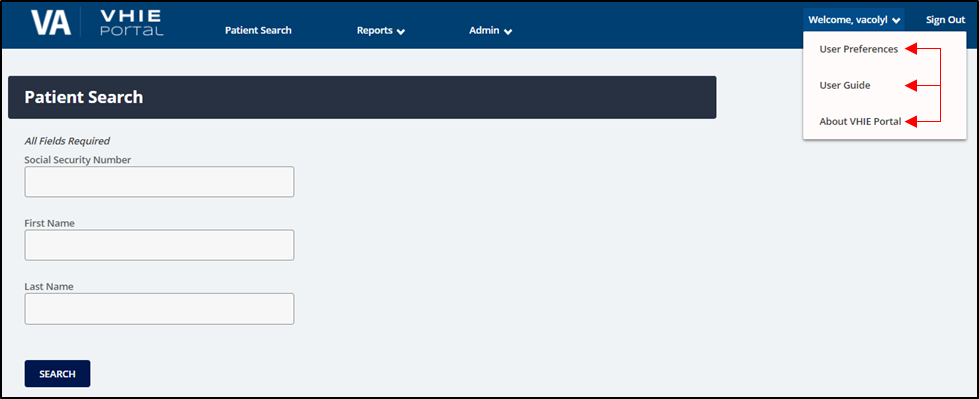
## Welcome Menu—User Preferences, User Guide, and About VHIE Portal

From within the VHIE Portal, a VHIE user can select the displayed username at the top of the web page ([Figure 73](#_bookmark143)) to select the **Welcome** menu items:

* **User Preferences—**Set or update a default facility.
* **User Guide—**Access the *Portal User Guide*.
* **About VHIE Portal—**View information about the VHIE Portal software.

### Prerequisite

The user has logged in via SSOi or another VA-approved method for authentication.

**Figure 73: Welcome Menu—User Preferences, User Guide, and About VHIE Portal**

### Set or Update User’s Default Facility

The VHIE user can set or remove their default facility from the notification message at the “**VHIE Portal**” Landing Page or by selecting **User Preferences** from the **Welcome** menu, under the username.

### Prerequisite

The user has logged in via SSOi or another VA-approved method for authentication.

**Table 17: Set or Update User’s Default Facility**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | If the VHIE user has *not* set a default facility, a notification message displays at the “**VHIE Portal**” Landing Page after login ([Figure 74](#_bookmark147)).  Note  **NOTE**: The notification message will continue to display at the “**VHIE Portal**” Landing Page until the VHIE user has set a default facility.  **Figure 74: VHIE Portal—Landing Page: Notification Message to Set Default Facility**  VHIE Portal„Landing Page: Notification Message to Set Default Facility |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | If the VHIE user moves on from the “**VHIE Portal**” Landing Page without setting a default facility, the VHIE user can access the web page to set a default facility by selecting **User Preferences** from the **Welcome** menu ([Figure 75](#_bookmark148)).  **Figure 75: Welcome Menu—Selecting User Preferences**  Welcome Menu„Selecting User Preferences |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 3. | Select the VA Facility from the drop-down list to use as the default facility, then select **Set Default Facility** ([Figure 76](#_bookmark149)).  **Figure 76: Default Facility—Setting Default Facility**  Default Facility„Setting Default Facility |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 4. | After setting a default facility, the VHIE user can set a new default facility at any time or remove the current default facility by selecting **Remove Default Facility** ([Figure 77](#_bookmark150)).  **Figure 77: Default Facility—Removing Default Facility**  RDefault Facility„Removing Default Facility |

### Access User Guide

The VHIE user can access the VHIE Portal User Guide by selecting **User Guide** from the

**Welcome** menu, under the username.

#### 4.12.4.1 Prerequisite

The user has logged in via SSOi or another VA-approved method for authentication.

**Table 18: Access User Guide**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | From the **Welcome** menu, select **User Guide** ([Figure 78](#_bookmark153)).  **Figure 78: Welcome Menu—Selecting User Guide**  Welcome Menu„Selecting User Guide |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | The VHIE user is automatically re-directed to the VA Software Document Library (VDL) to download the PDF file of the applicable VHIE Portal User Guide ([Figure 79](#_bookmark154)).  **Figure 79: VA Software Document Library (VDL)—VHIE Portal User Guide PDF**  VA Software Document Library (VDL)„VHIE Portal User Guide PDF |

### View System Software Information

The VHIE user can view the system status and software version of the VHIE Portal by selecting

**About VHIE Portal** from the **Welcome** menu, under the username.

#### 4.12.5.1 Prerequisite

The user has logged in via SSOi or another VA-approved method for authentication.

**Table 19: View System Software Information**

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1. | From the **Welcome** menu, select **About VHIE Portal** ([Figure 80](#_bookmark157)).  **Figure 80: Welcome Menu—Selecting About VHIE Portal**  About vhie portal in menu |

|  |  |
| --- | --- |
| **Step** | **Action** |
| 2. | The information is displayed for the software version and the system status of the VHIE Portal ([Figure 81](#_bookmark158)).  **Figure 81: “About VHIE Portal” Screen** |

# Troubleshooting

## Special Instructions for Error Correction

**Table 20: Special Instructions for Error Correction**

|  |  |  |  |
| --- | --- | --- | --- |
| **User Interface** | **Error** | **Cause** | **Resolution** |
| Login Screen | User does not have permissions. | This is caused when the user account, passed from SSOi, is *not* mapped to the VHIE Portal user access list. | If you need access or have existing permissions, contact the Enterprise Service Desk (ESD) for support. |
| Patient Search Screen | SSN is required.  Last Name is required.  First Name is required. | The SSN, Last Name, and First Name fields *must* be filled before pressing the **Search** button. Any or all of these errors can occur depending on which fields were filled in and which were not. | The SSN, Last Name, and First Name fields *must* all be filled in before pressing the **Search** button. |
| Patient Search Screen | SSN is not valid. | The SSN field needs to contain **nine** (**9**) numeric characters. This error occurs if less than **nine** (**9**) numeric characters or any *non*-numeric characters are entered. | The SSN field *must* contain exactly **nine** (**9**) numeric and no other characters before pressing the **Search** button. (The Last Name and First Name fields *must* also be populated.) |
| Patient Search Screen | Last Name is not valid.  First Name is not valid. | The Last Name and First Name fields *must* contain alphabetic characters only. Some special characters, such as periods and apostrophes, are allowed. Either or both errors can occur depending on which fields were filled incorrectly. | The Last Name and First Name fields *must* contain only alphabetic characters before pressing the **Search** button. (Some special characters are allowed, such as periods and apostrophes.) |
| Opt-out of Sharing Screen | Patient Signature Date *must* be after the date the authorization was signed. | This message occurs when you choose the **Opt-out** option on the “**Opt-out of Sharing**” screen if the patient signature date entered is earlier than the date the authorization was originally signed. | The Patient Signature Date field on the “**Opt-out of Sharing**” screen *must* be filled with a date later than the date the authorization was originally signed if you choose "**Opt-out**" as the reason. |
| Export Disclosures Report to  .CSV | Date column is not displaying the date in a standard Date and  Time format | This is a result of Excel automatically converting the text file into a different into a default format. | 1. Right-click on the **Date**   column.   1. Select **Format Cells**. 2. Under the **Number** tab, select **Date** as the **Category**. |

|  |  |  |  |
| --- | --- | --- | --- |
| **User Interface** | **Error** | **Cause** | **Resolution** |
|  | when opening using Excel. |  | 4. Select the format **Type** to display the Date and Time (e.g., **2/14/12 1:30 PM**). |
| View Saved XML for Disclosures Reports and CDA- type Health Documents | Saved XML displays error message on the browser. | If using Google Chrome as the browser, after opening the XML file, the file is opened using IE as the default application. | * **Resolution 1:**   Use Microsoft (MS) Internet Explorer (IE) as the browser when downloading XML.   * **Resolution 2:**   If using Google Chrome as the browser, the user *must* open the saved file using Google Chrome or another XML viewer application (e.g., MS Edge or Notepad). |

# Acronyms and Abbreviations

**Table 21: Acronyms and Abbreviations**

|  |  |
| --- | --- |
| **Term** | **Definition** |
| 508 | Section 508 Accessibility |
| AD | Active Directory |
| AWS | Amazon Web Service |
| CDA | Clinical Document Architecture |
| COTS | Commercial-Off-the-Shelf |
| CSV | Comma-Separated Values |
| DAO | Designated Approving Officer |
| DoD | Department of Defense |
| eHX | eHealth Exchange |
| ePAS | Electronic Permission Access System |
| ESR | Enrollment System Redesign |
| GAL | Global Address List |
| HC IdM | Healthcare Identity Management |
| HEP | HealthShare Enterprise Platform |
| HITSP | Healthcare Information Technology Standards Panel |
| HS | HealthShare |
| HTML | HyperText Markup Language |
| ICN | Integration Control Number (MVI) |
| ID | Identifier or Identification |
| IE | Internet Explorer |
| LAN | Local Area Network |
| MISSION | Maintaining Internal Systems and Strengthening Integrated Outside Networks |
| MS | Microsoft |
| MVI | Master Veteran Index |
| PDF | Portable Document Format |
| PII | Personally Identifiable Information |
| PIV | Personal Identity Verification |
| POC | Point of Contact |

|  |  |
| --- | --- |
| **Term** | **Definition** |
| PPP | Patient’s Participation Preferences |
| SES | Single Encounter Summary |
| SSA | Social Security Administration |
| SSN | Social Security Number |
| SSOi | Single Sign On – internal |
| TMS | Talent Management System |
| UG | User Guide |
| UI | User Interface |
| URL | Uniform Resource Locator |
| VA | Department of Veterans Affairs |
| VAP | Veterans Authorizations and Preferences |
| VDIF | Veterans Data Integration and Federation |
| VDL | VA Software Document Library |
| VHA | Veterans Health Administration |
| VHIE | Veterans Health Information Exchange |
| VIP | Veteran-focused Integrated Process |
| VistA | Veterans Health Information Systems and Technology Architecture |
| VLER | Virtual Lifetime Electronic Record |
| WWW | World Wide Web |
| XML | Extensible Markup Language |