

Veterans Health Information Exchange (VHIE) Portal

Build 3.6 VHIE Portal User Guide



Version 3.7

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**Department of Veterans Affairs (VA)
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Revision History

Date	Revision	Description	Author
08/27/2020	3.7	Updates: <ul style="list-style-type: none"> • Section 3.2: 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. • 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: TEB
04/2020	3.6	Updates: <ul style="list-style-type: none"> • Updated language from AITC to AWS. • Update Section 3 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	<ul style="list-style-type: none"> • 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. to differentiate Prod and Non-Prod AD policy groups. 	VHIE Agile Development
03/2020	3.3	Updated Section 4.1 to include description for all VHIE Roles.	VHIE Agile Development
03/2020	3.2	Added Section 4.1 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 and 4.2.3 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

Date	Revision	Description	Author
03/2020	3.0	Updated Section 3 to include the Production Uniform Resource Locator (URL). Removed/updated sub-sections under Sections 4.11 and 4.12 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 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 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
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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 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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1 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.

1.1 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.

2 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.

3 Getting Started

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

3.1 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.	<ul style="list-style-type: none"> • 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).	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • 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).	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • AAC VDIF VHIE Super Users NPD • AAC VDIF VHIE Super Users PRD

3.2 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](#)
- [Step 2. Submit Access Request](#)



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

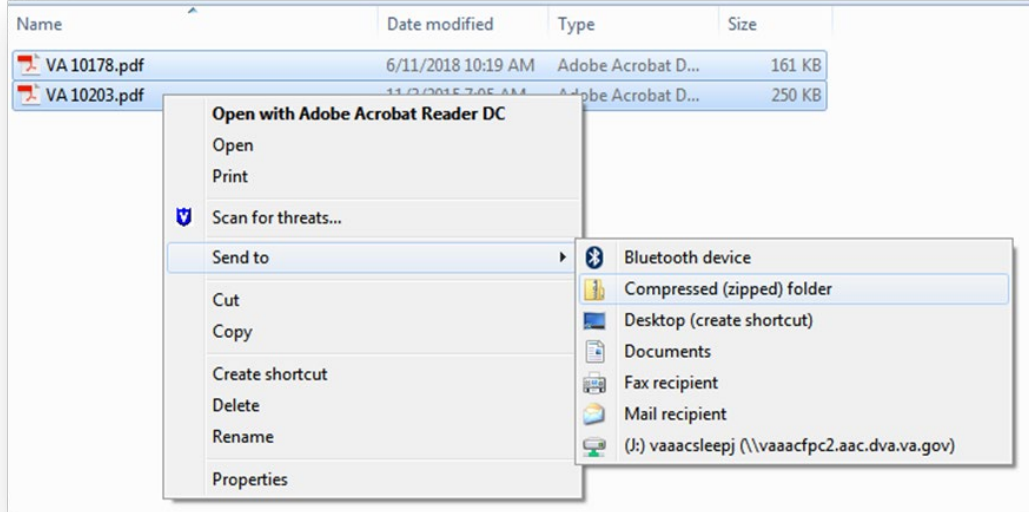
3.2.1 Step 1. Complete Training

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

1. Log into the [Talent Management System \(TMS\)](#) 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)**
2. Save completed training certificates:
 - a. Save the completion certificates from both courses in a folder on your desktop.
 - b. Open the folder where you saved the certificates.
 - c. Select both certificates by holding the **CTRL** key and selecting each certificate.

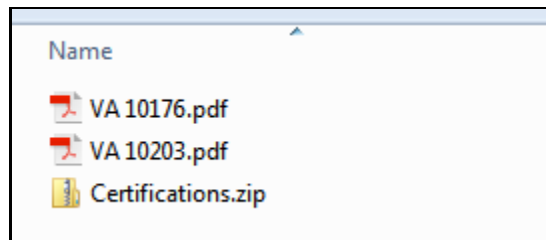
- d. Right click on one of the certificates and select **Send To → Compressed (zipped) folder**, as shown in [Figure 1](#):

Figure 1: Zipping together Completed Training Certificates



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

Figure 2: Verifying Training Certificates Zip File Name



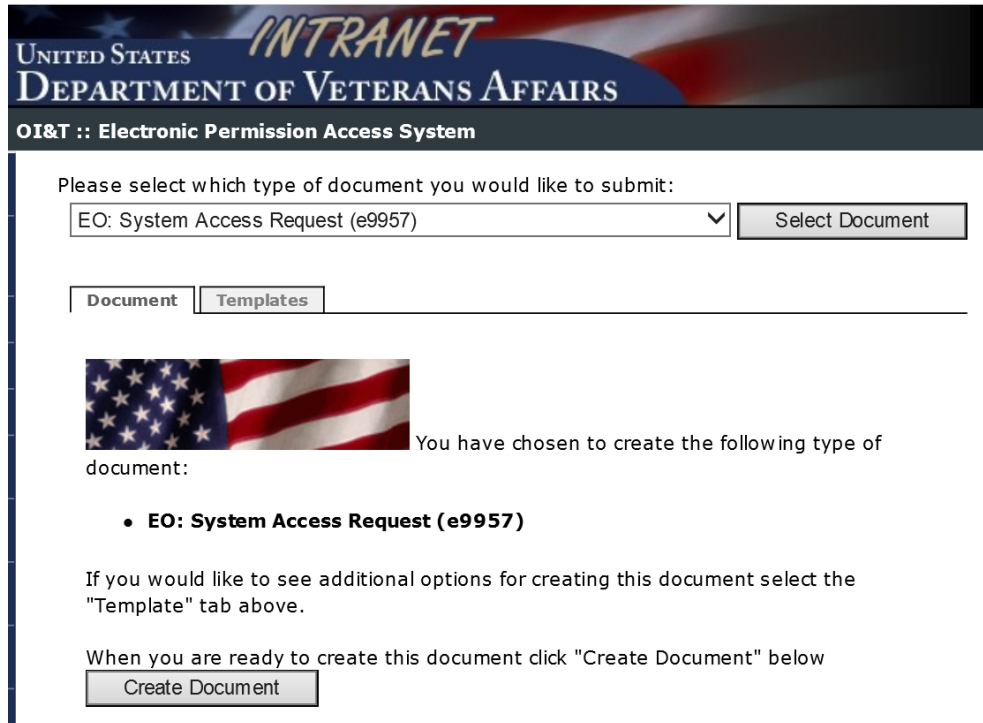
NOTE: You will upload this file to the Electronic Permission Access System (ePAS) request in [Step 2](#) of these instructions.

3.2.2 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](#) page.
2. Ensure that the “*EO: System Access Request (e9957)*” document is selected from the drop-down list, as shown in [Figure 3](#):

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



The screenshot shows the OIT Electronic Permission Access System (ePAS) interface. At the top, there is a header with the text "UNITED STATES INTRANET DEPARTMENT OF VETERANS AFFAIRS" and "OI&T :: Electronic Permission Access System". Below the header, there is a form with the following elements:

- A text prompt: "Please select which type of document you would like to submit:"
- A dropdown menu with the selected option: "EO: System Access Request (e9957)".
- A "Select Document" button.
- Two tabs: "Document" (selected) and "Templates".
- An image of the American flag.
- A text prompt: "You have chosen to create the following type of document:"
- A bulleted list with one item: "EO: System Access Request (e9957)".
- A text prompt: "If you would like to see additional options for creating this document select the 'Template' tab above."
- A text prompt: "When you are ready to create this document click 'Create Document' below"
- A "Create Document" button.

3. 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](#))
- **Type of Access** tab ([Step 5](#))
- **Comment** tab ([Step 6](#))



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

4. 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:
 - a. 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
 - b. 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](#):

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

The screenshot shows the 'General' tab of the Microsoft Outlook Global Address List (GAL) for a contact named 'Monica'. The 'Alias' field is highlighted with a red dashed box and contains the text 'VHAISFALLENM'. Other fields include Name (First: Monica, Last:), Address, City, State, Zip code, Country/Region, Title, Company, Department, Office, Assistant, and Phone.

c. 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.

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

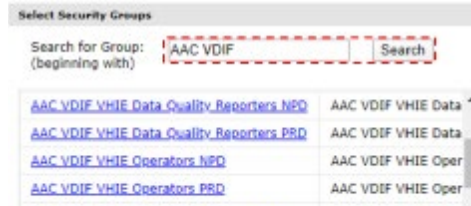
a. Check the **LAN and Exchange Access** checkbox, as shown in [Figure 5](#):

Figure 5: LAN and Exchange Access Checkbox

The screenshot shows the 'Type of Access' tab of a request form. The 'LAN Access' section is highlighted, and the 'LAN and Exchange Access' checkbox is checked.

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

Figure 6: Searching for “AAC VDIF” Security Groups

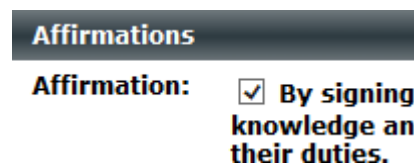


- iii. Click **Search**.
 - iv. Select appropriate Security Group:
 - **AAC VDIF VHIE Reporters PRD**—Users run and view results for the detailed and summary reports (individual patient search or edit consent policies are *not* available).

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

Figure 7: Affirmations Dialog—Signing Document



- d. Complete the “Security and Privacy” dialog entries ([Figure 8](#)):
 - i. Select **Browse**.
 - ii. Locate and attach the ZIP file containing certificates that you created in [Step 2](#).
 - iii. 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

Security and Privacy

Proof of VA Privacy and Information Security Awareness and Rules of Behavior (VA 10176 10203) for those working with PHI/PII) are required to be uploaded for all accounts.

You may lookup the required training date here: <http://go.va.gov/cd3l>

NO SENSITIVE DATA MAY BE UPLOADED IN ATTACHMENTS

Documentation:

Date of Last Privacy/Security Awareness:

6. On the **Comments** tab, do the following:
 - a. Type the following text into the “**Comments**” box, as shown in [Figure 9](#):

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

The screenshot shows a web interface with four tabs: Request, Type of Access, Comments, and Instructions. The Comments tab is active. Below the tabs, there is a header for the comment: "New comment by Blom, Thomas:". Below this is a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, strikethrough, subscript, superscript, bulleted list, numbered list, indent, and font size. The text entered in the editor is: "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." At the bottom right of the editor is a small icon. Below the editor, a "Save and Submit" button is highlighted with a red rectangular box.

- b. Select the **Save and Submit** button, see [Figure 9](#).

- c. If prompted with the “Signature” dialog pop-up, as shown in [Figure 10](#), 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

Signature ✕

You have two options for signing this document. Either enter your domain credentials (Username & Password) or digitally sign it using a smartcard.

Sign using Domain Credentials

Username: VHA03\vhaeaspalumch

Password:

Or digitally sign with Smartcard or Certificate

[Click here to digitally sign this document](#)






3.3 Log in Via SSOi

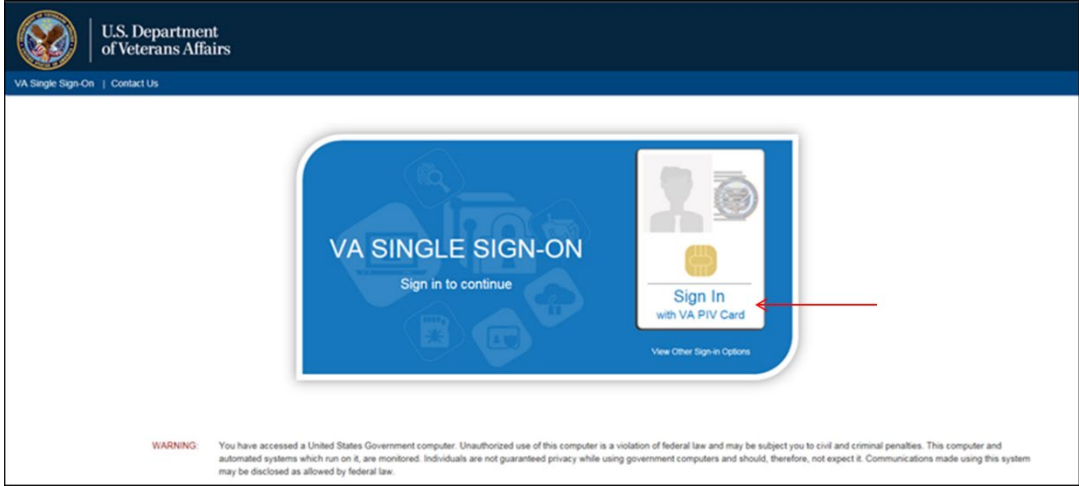
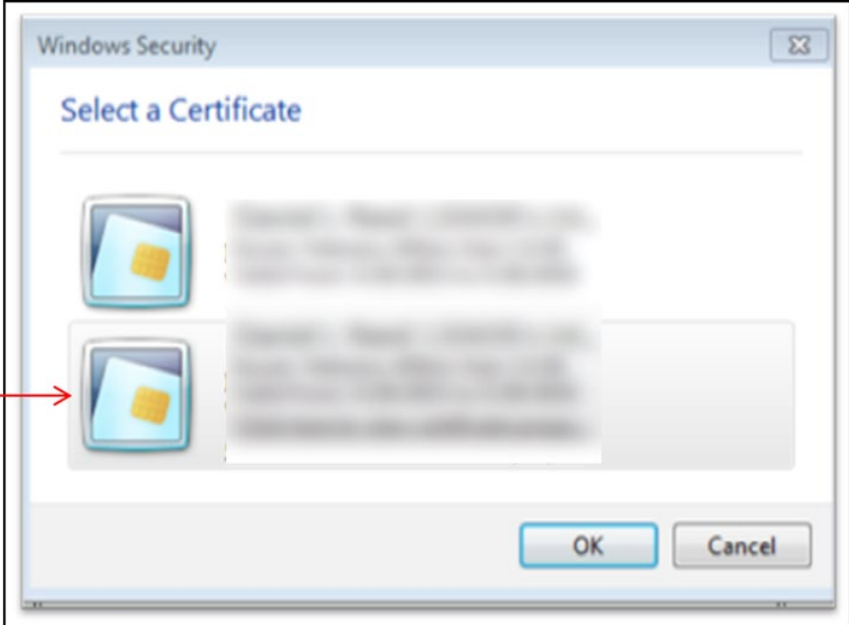
Take the following steps to log in via Single Sign On – internal (SSOi):

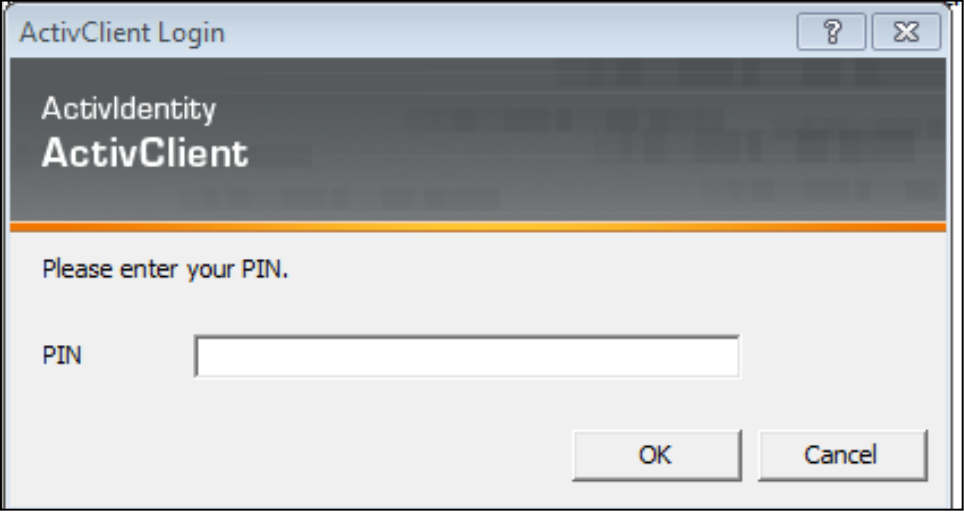


NOTE: Once integrated with SSOi, users will only use their PIV card for login per VA’s HSPD-12 implementation of mandatory PIV, unless a special exemption is permitted, and the user requires a VA username and password.

Table 2: Log in via SSOi

Step	Action
1.	<p>Navigate to the “VHIE Portal Login” screen at https://vhieportal.hsh.va.gov/csp/vhieui/portal/index.csp#/</p> <p> NOTE: If presented with the website’s security certificate error (Figure 11), select “Continue to this website (not recommended)”.</p> <p>Figure 11: Sample Error Message—Problem with Website’s Security Certificate</p> <div data-bbox="331 951 1406 1430" style="border: 1px solid black; padding: 10px;">  There is a problem with this website’s security certificate. <hr/> <p>The security certificate presented by this website was issued for a different website’s address.</p> <p>Security certificate problems may indicate an attempt to fool you or intercept any data you send to the server.</p> <p>We recommend that you close this webpage and do not continue to this website.</p> <ul style="list-style-type: none">  Click here to close this webpage.  Continue to this website (not recommended).  More information </div>

Step	Action
2.	<p>Log in using your PIV card (Figure 12).</p> <p style="text-align: center;">Figure 12: “VA Single Sign-On” Screen (PIV Card)</p> 
3.	<p>Select the appropriate certificate and select OK.</p> <p>i NOTE: Always select the second certificate as the authentication certificate (Figure 13). If you see more than two certificates displayed, make sure to clear your browser’s cached certificates under Internet Tools.</p> <p style="text-align: center;">Figure 13: Windows Security—“Select a Certificate” Screen</p> 

Step	Action
4.	<p>Enter the PIN associated with your PIV card and select OK (Figure 14).</p> <p style="text-align: center;">Figure 14: ActivClient Login—PIV PIN Pop-Up Screen</p> 

5.	<p>Arrive at the “VHIE Portal” Landing Page (Figure 15).</p> <p style="text-align: center;">Figure 15: VHIE Portal—Landing Page</p> 
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3.4 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

3.5 Exit System

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

4 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.

4.1 Patient Search

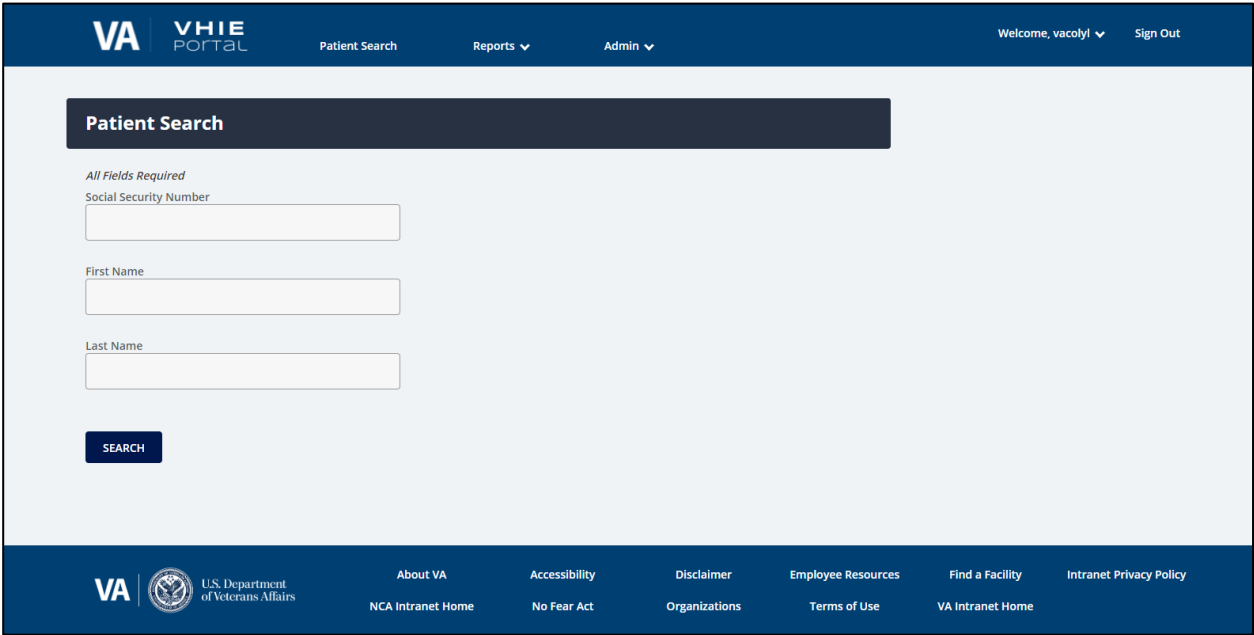
The Patient Search allows for a VHIE user to search by the following patient identifiers:

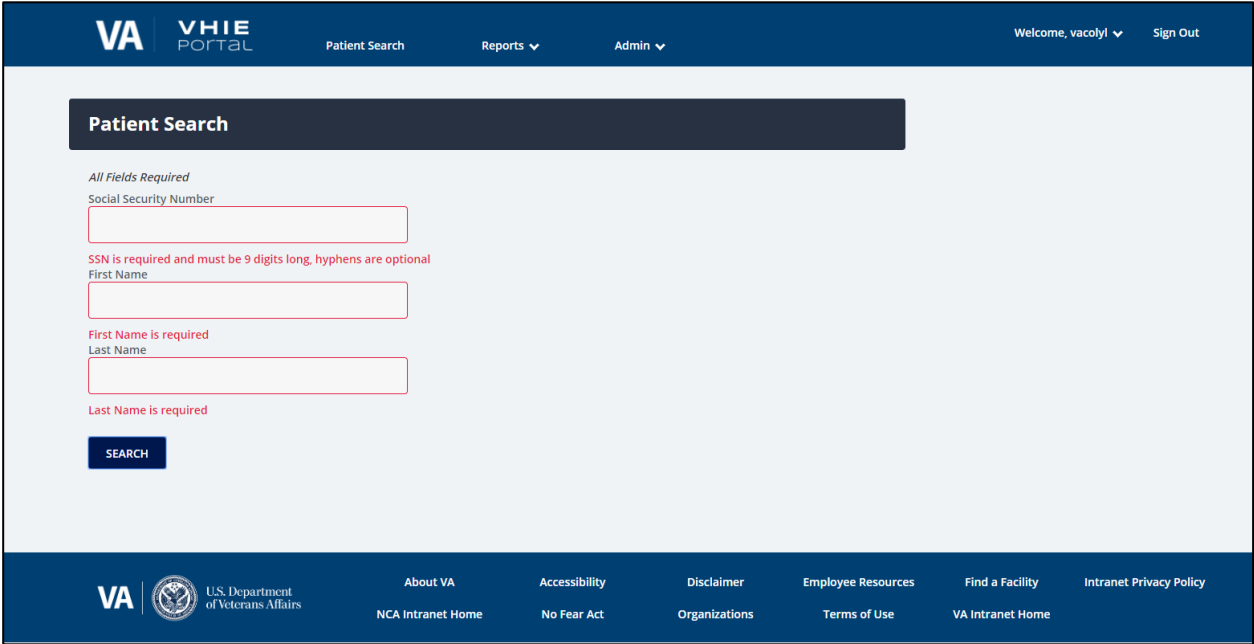
- Social Security Number (SSN)
- First Name
- Last Name.

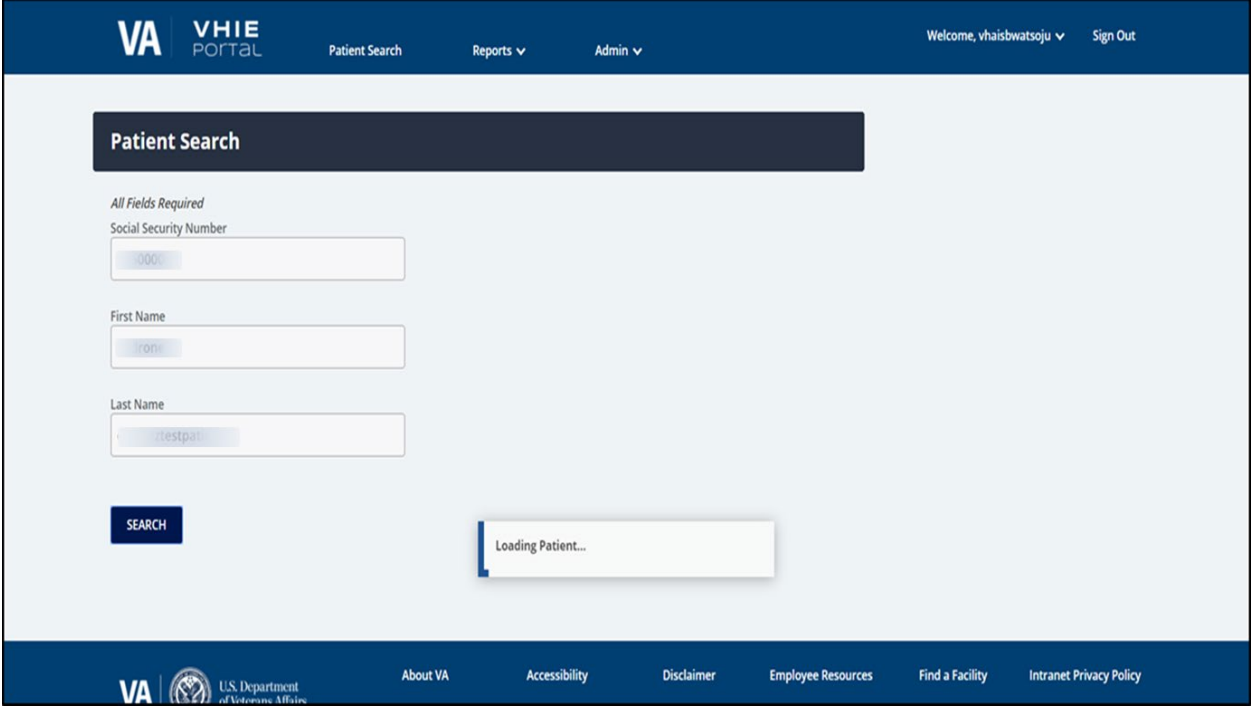
4.1.1 Prerequisite

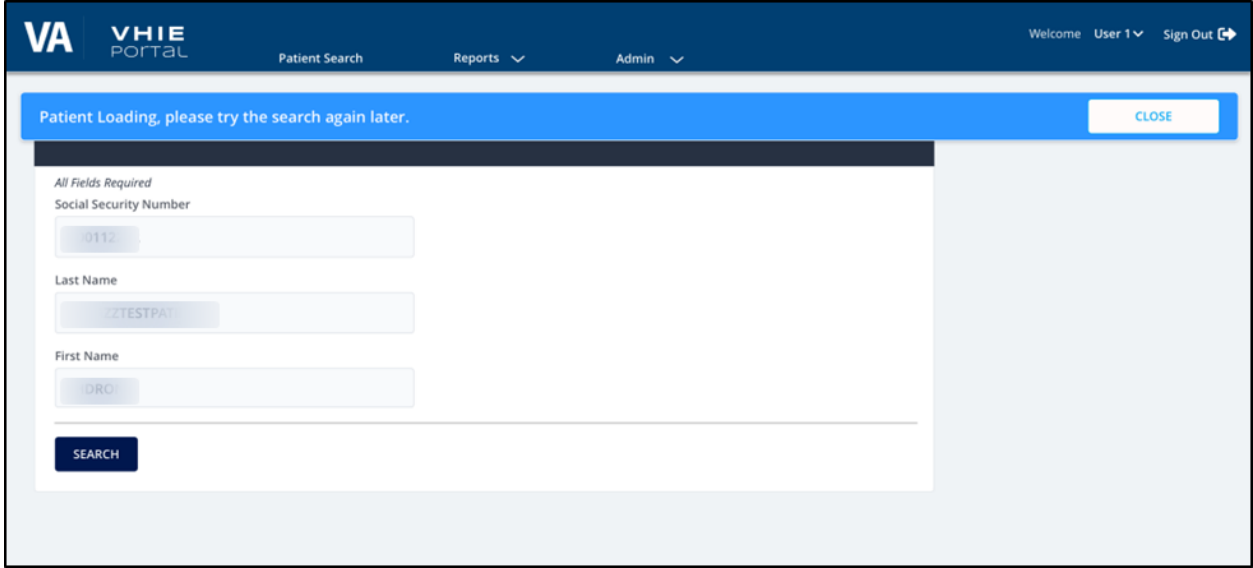
The user has logged in via SSOi or another VA-approved method for authentication.

Table 3: Patient Search

Step	Action
1.	<p>Complete the Social Security Number, First Name, and Last Name fields, and then select Search (Figure 16).</p> <p>i 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).</p> <p style="text-align: center;">Figure 16: VHIE Portal—"Patient Search" Screen</p> 

Step	Action
2.	<p>Form validation is enforced to ensure that users complete each field in the correct format (Figure 17).</p> <p style="text-align: center;">Figure 17: VHIE Portal—"Patient Search" Screen: Field Validation</p> 

Step	Action
3.	<p>A progress bar will display to indicate that a patient search is processing (Figure 18).</p> <p>Figure 18: VHIE Portal—“Patient Search” Screen: Data Entries (Masked) and Progress Status Bar</p>  <p>The screenshot shows the 'Patient Search' interface. At the top is a dark blue navigation bar with the VA logo, 'VHIE PORTAL', and links for 'Patient Search', 'Reports', and 'Admin'. On the right, it says 'Welcome, vhaibwatoju' and 'Sign Out'. Below the navigation bar is a white search area with a dark blue header 'Patient Search'. Underneath, it says 'All Fields Required' and lists three input fields: 'Social Security Number' (masked with '000'), 'First Name' (masked with 'ron'), and 'Last Name' (masked with 'restpa'). A dark blue 'SEARCH' button is located below the fields. To the right of the search button is a white progress bar with the text 'Loading Patient...'. At the bottom of the page is a dark blue footer with the VA logo, 'U.S. Department of Veterans Affairs', and links for 'About VA', 'Accessibility', 'Disclaimer', 'Employee Resources', 'Find a Facility', and 'Intranet Privacy Policy'.</p>

Step	Action
4.	<p>If the patient’s record has <i>not</i> been loaded from the Legacy system, a notification message will display for the user to try the search again later (Figure 19).</p> <p style="text-align: center;">Figure 19: VHIE Portal—Notification Message: Patient Loading and to Try Search Later</p>  <p>The screenshot shows the VHIE Portal interface. At the top, there is a dark blue header with the VA logo, 'VHIE PORTAL', and navigation links for 'Patient Search', 'Reports', and 'Admin'. On the right side of the header, it says 'Welcome User 1' and 'Sign Out'. A blue notification banner at the top of the main content area displays the message 'Patient Loading, please try the search again later.' with a 'CLOSE' button on the right. Below the notification is a search form titled 'All Fields Required'. The form contains three input fields: 'Social Security Number' (with the value '0112'), 'Last Name' (with the value 'ZZTESTPA1'), and 'First Name' (with the value 'DRC'). A dark blue 'SEARCH' button is located at the bottom of the form.</p>

4.2 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.

4.2.1 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.

4.2.2 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](#):

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

The screenshot shows the VHIE Portal interface. At the top, there is a navigation bar with the VA logo, VHIE PORTAL, Patient Search, Reports, Admin, and a user profile (Welcome, vacolyf) with a Sign Out button. The main content area is titled "Patient Detail" and contains a table of demographic information. The table has columns for Last Name, First Name, MI, Gender, Date of Birth, Multiple, SSN, ICN, Address, Phone, and Preferred Facility. The Address field is highlighted with a red dashed box and contains the text "3000 Test Street". Below the table, there are four tabs: Consent Status, Comments, Generate Documents, and Facilities. The Consent Status tab is active and shows two sections: "Participation" and "Social Security Administration (SSA)". The Participation section has a text block and an "OPT-OUT" button. The SSA section has a text block. At the bottom, there is a table with columns for Consent Directive, Purpose, Status, Authorization / Revocation, Entered, Signature, Expiration, Comments, and User Id. The table contains two rows of data.

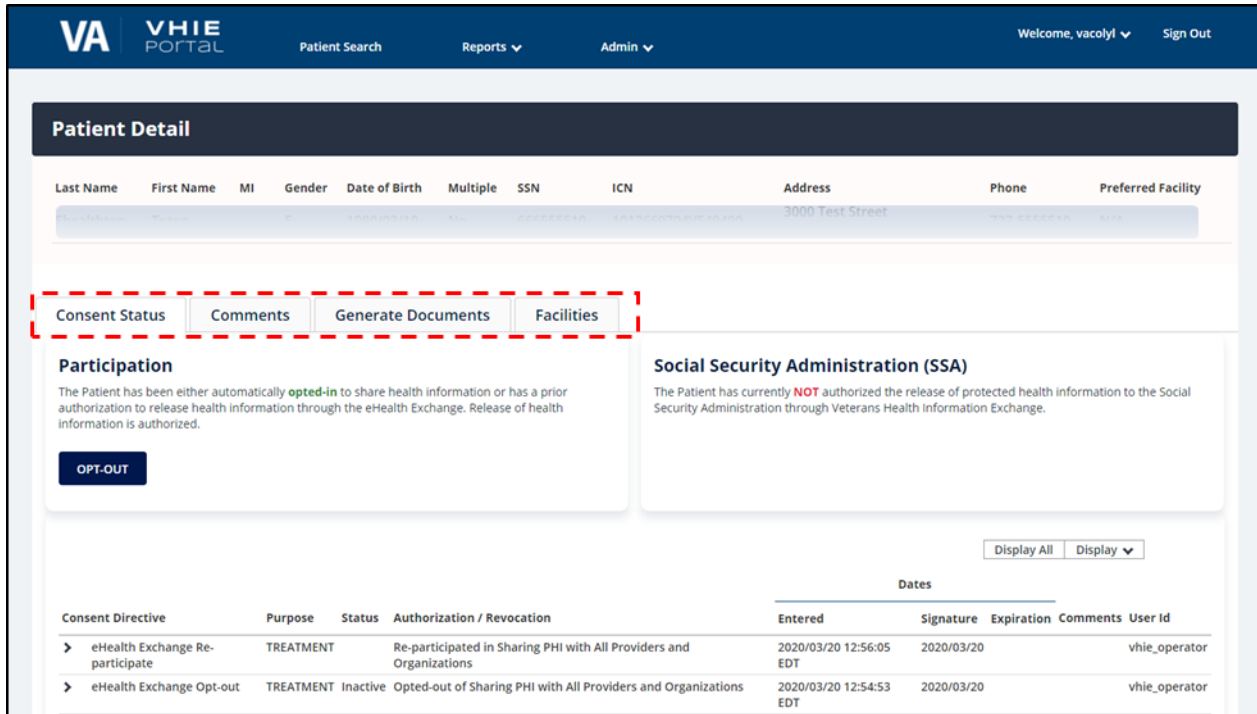
Consent Directive	Purpose	Status	Authorization / Revocation	Dates			Comments	User Id
				Entered	Signature	Expiration		
> eHealth Exchange Re-participate	TREATMENT		Re-participated in Sharing PHI with All Providers and Organizations	2020/03/20 12:56:05 EDT		2020/03/20		vhie_operator
> eHealth Exchange Opt-out	TREATMENT	Inactive	Opted-out of Sharing PHI with All Providers and Organizations	2020/03/20 12:54:53 EDT		2020/03/20		vhie_operator

4.2.3 Patient-Centric Functions

The following functional tabs ([Figure 21](#)) 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



4.3 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.

4.3.1 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.

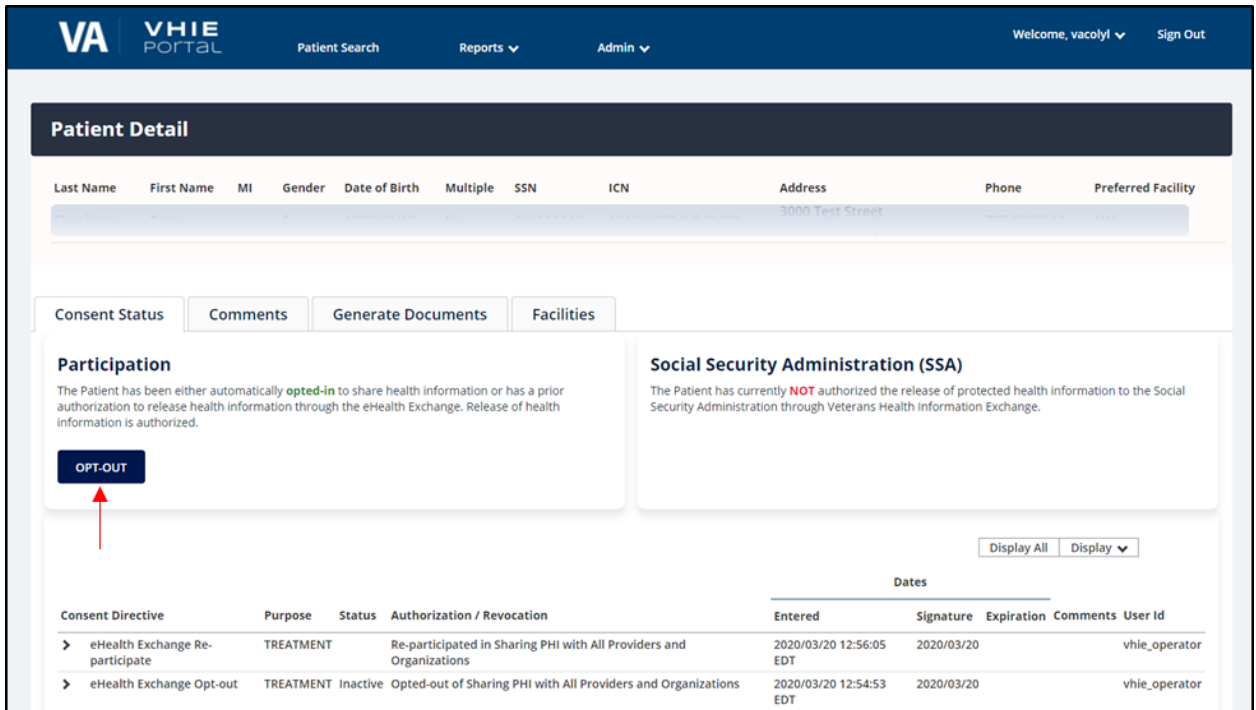
4.3.2 Participation Preference: Opt-Out of Sharing (Not Participating)

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.

4.3.2.1 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.	<p>If the Veteran is currently participating in sharing, there will be an Opt-Out button under the “Participation” section (Figure 22). Select the Opt-Out button to open the participation form and fill out the required information.</p> <p style="text-align: center;">Figure 22: VHIE Portal—“Patient Detail” Screen: Opt-Out Button</p>  <p>The screenshot shows the VHIE Portal interface. At the top, there is a navigation bar with the VA logo, 'VHIE PORTAL', and links for Patient Search, Reports, and Admin. The user is logged in as 'Welcome, vaco1'. The main content area is titled 'Patient Detail' and displays patient information including Last Name, First Name, MI, Gender, Date of Birth, Multiple, SSN, ICN, Address (3000 Test Street), Phone, and Preferred Facility. Below this, there are tabs for Consent Status, Comments, Generate Documents, and Facilities. The 'Participation' section is active, showing a message: 'The Patient has been either automatically opted-in to share health information or has a prior authorization to release health information through the eHealth Exchange. Release of health information is authorized.' A blue 'OPT-OUT' button is visible, with a red arrow pointing to it. To the right, the 'Social Security Administration (SSA)' section shows: 'The Patient has currently NOT authorized the release of protected health information to the Social Security Administration through Veterans Health Information Exchange.' At the bottom, there is a table of Consent Directives.</p> <table border="1"> <thead> <tr> <th rowspan="2">Consent Directive</th> <th rowspan="2">Purpose</th> <th rowspan="2">Status</th> <th rowspan="2">Authorization / Revocation</th> <th colspan="3">Dates</th> <th rowspan="2">Comments</th> <th rowspan="2">User Id</th> </tr> <tr> <th>Entered</th> <th>Signature</th> <th>Expiration</th> </tr> </thead> <tbody> <tr> <td>> eHealth Exchange Re-participate</td> <td>TREATMENT</td> <td></td> <td>Re-participated in Sharing PHI with All Providers and Organizations</td> <td>2020/03/20 12:56:05 EDT</td> <td>2020/03/20</td> <td></td> <td></td> <td>vhie_operator</td> </tr> <tr> <td>> eHealth Exchange Opt-out</td> <td>TREATMENT</td> <td>Inactive</td> <td>Opted-out of Sharing PHI with All Providers and Organizations</td> <td>2020/03/20 12:54:53 EDT</td> <td>2020/03/20</td> <td></td> <td></td> <td>vhie_operator</td> </tr> </tbody> </table>	Consent Directive	Purpose	Status	Authorization / Revocation	Dates			Comments	User Id	Entered	Signature	Expiration	> eHealth Exchange Re-participate	TREATMENT		Re-participated in Sharing PHI with All Providers and Organizations	2020/03/20 12:56:05 EDT	2020/03/20			vhie_operator	> eHealth Exchange Opt-out	TREATMENT	Inactive	Opted-out of Sharing PHI with All Providers and Organizations	2020/03/20 12:54:53 EDT	2020/03/20			vhie_operator
Consent Directive	Purpose					Status	Authorization / Revocation	Dates			Comments	User Id																			
		Entered	Signature	Expiration																											
> eHealth Exchange Re-participate	TREATMENT		Re-participated in Sharing PHI with All Providers and Organizations	2020/03/20 12:56:05 EDT	2020/03/20			vhie_operator																							
> eHealth Exchange Opt-out	TREATMENT	Inactive	Opted-out of Sharing PHI with All Providers and Organizations	2020/03/20 12:54:53 EDT	2020/03/20			vhie_operator																							

Step	Action
2.	<p data-bbox="295 254 1484 317">Complete the required information fields and select the Save button to update the Veteran’s participation status (Figure 23).</p> <p data-bbox="583 380 1252 407" style="text-align: center;">Figure 23: VHIE Portal—“Opt-Out of Sharing” Screen</p> <div data-bbox="352 426 1484 1419" style="border: 1px solid black; padding: 10px;"> <p data-bbox="386 438 724 478">Opt-Out of Sharing</p> <p data-bbox="386 512 561 539"><i>Required Fields</i></p> <p data-bbox="386 558 644 585">Authenticating Facility</p> <div data-bbox="386 588 1330 657" style="border: 1px solid #ccc; height: 30px; margin-bottom: 10px;"></div> <p data-bbox="386 722 1459 753"><input type="checkbox"/> Form Validation for Opt-Out of Sharing Form 10-10164 Received and Validated (Required)</p> <p data-bbox="386 785 802 812">Patient Signature Date (YYYYMMDD)</p> <div data-bbox="386 814 1330 884" style="border: 1px solid #ccc; height: 30px; margin-bottom: 10px;"></div> <p data-bbox="386 949 716 976">Participation Update Reason</p> <div data-bbox="386 978 1330 1047" style="border: 1px solid #ccc; padding: 2px; margin-bottom: 10px;">Opt-Out ▼</div> <p data-bbox="386 1075 545 1102"><i>Optional Field</i></p> <p data-bbox="386 1121 513 1148">Comments</p> <div data-bbox="386 1150 1330 1283" style="border: 1px solid #ccc; height: 60px; margin-bottom: 10px;"></div> <div data-bbox="386 1325 716 1394" style="display: flex; justify-content: space-between; margin-top: 10px;"> <div data-bbox="386 1325 518 1394" style="background-color: #003366; color: white; padding: 5px 15px; border: none;">SAVE</div> <div data-bbox="545 1325 716 1394" style="border: 1px solid #003366; padding: 5px 15px; border-radius: 3px;">CANCEL</div> </div> </div>

4.3.3 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.

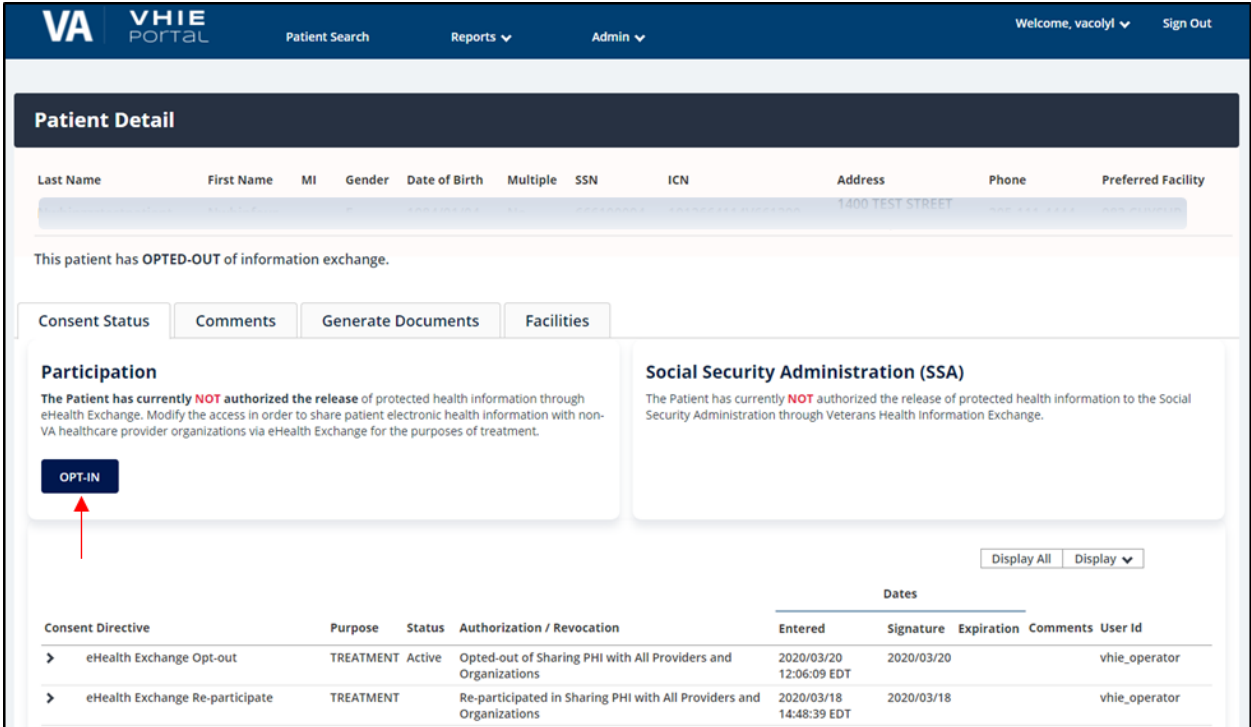
4.3.3.1 Prerequisite

- 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.	<p>If the veteran is currently <i>not</i> participating in sharing, there will be an Opt-In button under the “Participation” section (Figure 24). Select the Opt-In button to open the participation form and fill out the required information.</p> <p style="text-align: center;">Figure 24: VHIE Portal—“Patient Detail”: Opt-In Button</p>  <p>The screenshot shows the VHIE Portal interface for a patient's details. At the top, there is a navigation bar with the VA logo, 'VHIE PORTAL', and links for Patient Search, Reports, and Admin. The main content area is titled 'Patient Detail' and includes a patient information summary with fields for Last Name, First Name, MI, Gender, Date of Birth, Multiple, SSN, ICN, Address (1400 TEST STREET), Phone, and Preferred Facility. Below this, a message states 'This patient has OPTED-OUT of information exchange.' There are four tabs: Consent Status, Comments, Generate Documents, and Facilities. The 'Participation' section is active, showing a message: 'The Patient has currently NOT authorized the release of protected health information through eHealth Exchange. Modify the access in order to share patient electronic health information with non-VA healthcare provider organizations via eHealth Exchange for the purposes of treatment.' A blue 'OPT-IN' button is visible, with a red arrow pointing to it. To the right is the 'Social Security Administration (SSA)' section, which also indicates that the patient has not authorized the release of information. At the bottom, there is a table of Consent Directives.</p> <table border="1" data-bbox="316 1375 1502 1522"> <thead> <tr> <th rowspan="2">Consent Directive</th> <th rowspan="2">Purpose</th> <th rowspan="2">Status</th> <th rowspan="2">Authorization / Revocation</th> <th colspan="3">Dates</th> <th rowspan="2">Comments</th> <th rowspan="2">User Id</th> </tr> <tr> <th>Entered</th> <th>Signature</th> <th>Expiration</th> </tr> </thead> <tbody> <tr> <td>> eHealth Exchange Opt-out</td> <td>TREATMENT</td> <td>Active</td> <td>Opted-out of Sharing PHI with All Providers and Organizations</td> <td>2020/03/20 12:06:09 EDT</td> <td>2020/03/20</td> <td></td> <td></td> <td>vhie_operator</td> </tr> <tr> <td>> eHealth Exchange Re-participate</td> <td>TREATMENT</td> <td></td> <td>Re-participated in Sharing PHI with All Providers and Organizations</td> <td>2020/03/18 14:48:39 EDT</td> <td>2020/03/18</td> <td></td> <td></td> <td>vhie_operator</td> </tr> </tbody> </table>	Consent Directive	Purpose	Status	Authorization / Revocation	Dates			Comments	User Id	Entered	Signature	Expiration	> eHealth Exchange Opt-out	TREATMENT	Active	Opted-out of Sharing PHI with All Providers and Organizations	2020/03/20 12:06:09 EDT	2020/03/20			vhie_operator	> eHealth Exchange Re-participate	TREATMENT		Re-participated in Sharing PHI with All Providers and Organizations	2020/03/18 14:48:39 EDT	2020/03/18			vhie_operator
Consent Directive	Purpose					Status	Authorization / Revocation	Dates			Comments	User Id																			
		Entered	Signature	Expiration																											
> eHealth Exchange Opt-out	TREATMENT	Active	Opted-out of Sharing PHI with All Providers and Organizations	2020/03/20 12:06:09 EDT	2020/03/20			vhie_operator																							
> eHealth Exchange Re-participate	TREATMENT		Re-participated in Sharing PHI with All Providers and Organizations	2020/03/18 14:48:39 EDT	2020/03/18			vhie_operator																							

Step	Action
2.	<p>Complete the required information fields, then select the Save button to update the Veteran’s participation status (Figure 25).</p> <p style="text-align: center;">Figure 25: VHIE Portal—“Reparticipate in Sharing” Screen</p> <div data-bbox="354 428 1482 1371" style="border: 1px solid black; padding: 10px;"> <h3 style="margin: 0;">Reparticipate in Sharing</h3> <p><i>Required Fields</i></p> <p>Authenticating Facility <input style="width: 100%; height: 25px;" type="text"/></p> <p><input type="checkbox"/> Form Validation for Opt-Back-In for Sharing Form 10-10163 Received and Validated (Required)</p> <p>Patient Signature Date (YYYYMMDD) <input style="width: 100%; height: 25px;" type="text"/></p> <p>Participation Update Reason <input style="width: 100%; height: 25px;" type="text" value="Reparticipate"/></p> <p><i>Optional Field</i></p> <p>Comments <input style="width: 100%; height: 40px;" type="text"/></p> <p style="text-align: center;"> <input style="background-color: #003366; color: white; padding: 5px 15px; border: none;" type="button" value="SAVE"/> <input style="border: 1px solid #003366; padding: 5px 15px; margin-left: 20px;" type="button" value="CANCEL"/> </p> </div>

4.3.4 Deceased Patient Notification Message

If the Patient is deceased, a message will display in the “Patient Detail” and “Participation” sections (Figure 26) 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.

4.3.4.1 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

The screenshot shows the VHIE Portal interface. At the top, there is a navigation bar with the VA logo, 'VHIE PORTAL', and links for 'Patient Search', 'Reports', and 'Admin'. The user is logged in as 'Welcome, vacoly' and can 'Sign Out'. The main content area is titled 'Patient Detail' and contains a table with columns for 'Last Name', 'First Name', 'MI', 'Gender', 'Date of Birth', 'Multiple', 'SSN', 'ICN', 'Address', 'Phone', and 'Preferred Facility'. Below the table, a notification message states: '2019/06/28: Patient is Deceased, health information may no longer be shared electronically through eHealth Exchange. This patient has OPTED-OUT of information exchange.' Below the message are four buttons: 'Consent Status', 'Comments', 'Generate Documents', and 'Facilities'. The 'Participation' section shows a note: '2019/06/28: Patient is Deceased, health information may no longer be shared electronically through eHealth Exchange. Note: Health information for this record may be shared for six (6) months from the date of death (2019/12/28).' The 'Social Security Administration (SSA)' section shows a note: 'The Patient has currently NOT authorized the release of protected health information to the Social Security Administration through Veterans Health Information Exchange.'

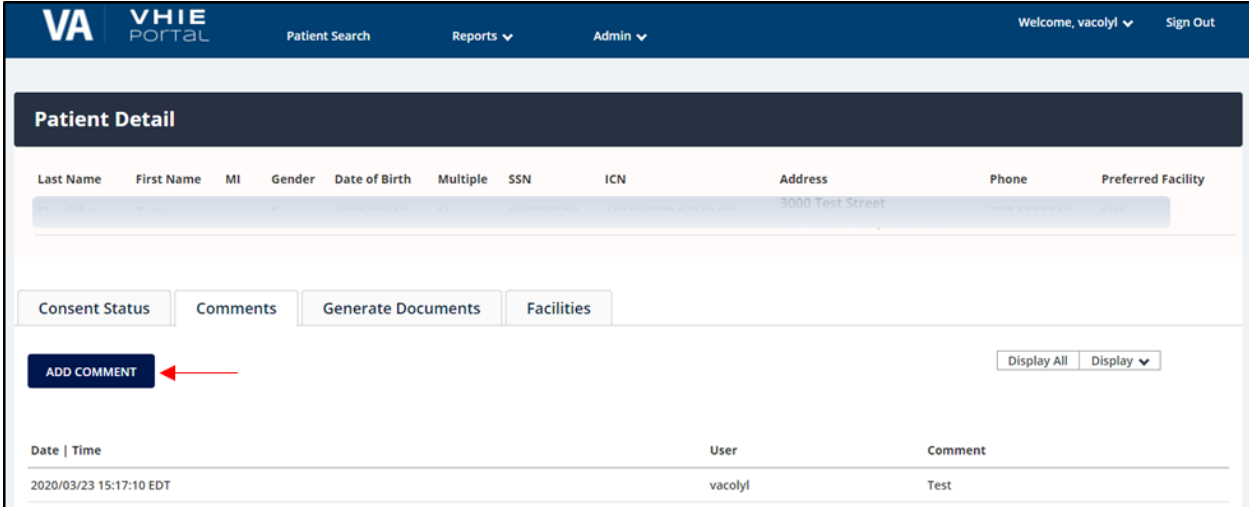
4.4 Comments Tab

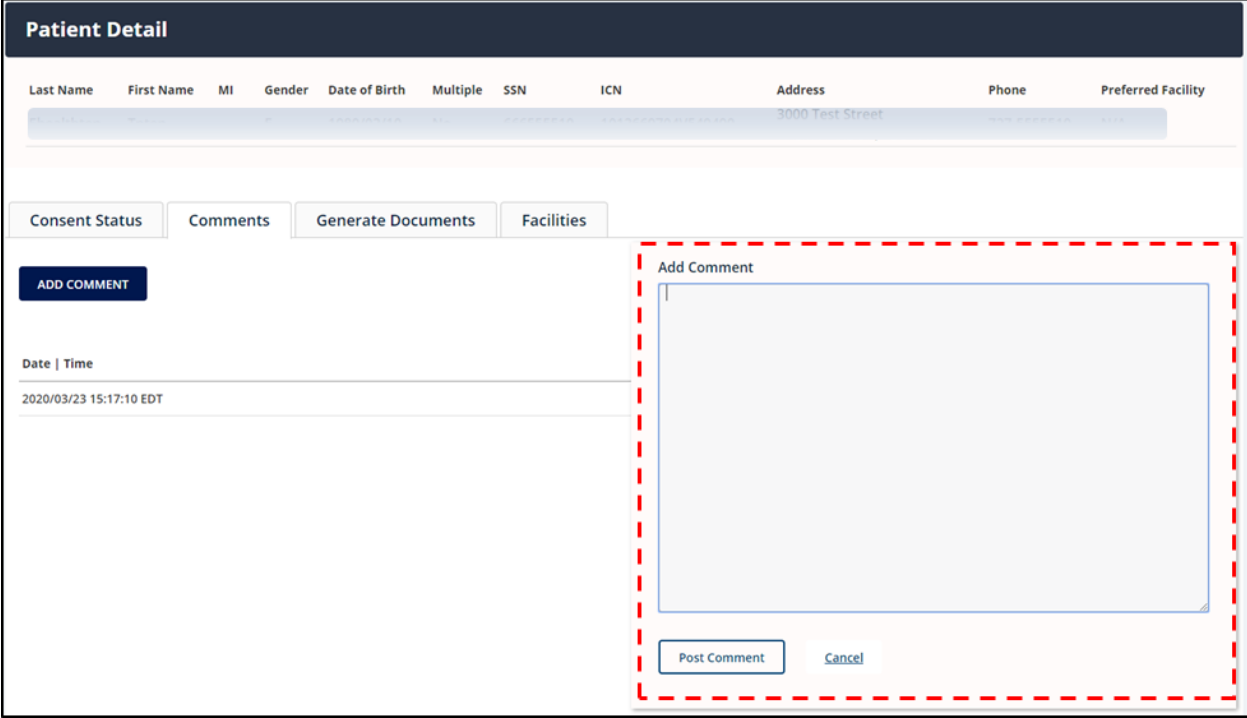
A VHIE user can select the **Comments** tab to view or add general comments about the patient.

4.4.1 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.	<p>To add a comment, under the Comments tab, select Add Comment (Figure 27).</p> <p style="text-align: center;">Figure 27: VHIE Portal—"Patient Detail" Screen: Add Comment Button</p>  <p>The screenshot shows the VHIE Portal interface. At the top, there is a navigation bar with the VA logo, 'VHIE PORTAL', and links for 'Patient Search', 'Reports', and 'Admin'. The user is logged in as 'vacoly1'. Below the navigation bar is a 'Patient Detail' section with a table of patient information including Last Name, First Name, MI, Gender, Date of Birth, Multiple, SSN, ICN, Address (3000 Test Street), Phone, and Preferred Facility. Below the patient information are four tabs: 'Consent Status', 'Comments', 'Generate Documents', and 'Facilities'. The 'Comments' tab is selected. In the 'Comments' section, there is a dark blue 'ADD COMMENT' button with a red arrow pointing to it. To the right of the button are 'Display All' and 'Display' dropdown menus. At the bottom, there is a table with columns for 'Date Time', 'User', and 'Comment'. The table contains one entry: '2020/03/23 15:17:10 EDT', 'vacoly1', and 'Test'.</p>

Step	Action
2.	<p data-bbox="297 254 1494 321">Complete the Add Comment field and select the Post Comment button to submit comment (Figure 28).</p> <p data-bbox="493 380 1341 411" style="text-align: center;">Figure 28: VHIE Portal—“Patient Detail” Screen: Adding Comments</p>  <p>The screenshot shows the 'Patient Detail' screen with a header bar. Below the header, there are fields for patient information: Last Name, First Name, MI, Gender, Date of Birth, Multiple, SSN, ICN, Address (3000 Test Street), Phone, and Preferred Facility. A navigation bar contains 'Consent Status', 'Comments', 'Generate Documents', and 'Facilities'. On the left, there is an 'ADD COMMENT' button and a 'Date Time' field showing '2020/03/23 15:17:10 EDT'. On the right, a red dashed box highlights the 'Add Comment' dialog box, which includes a large text input area, a 'Post Comment' button, and a 'Cancel' link.</p>

Step	Action																															
3.	<p>The most current comment will display as the top comment (Figure 29).</p> <p> NOTE: Comments posted in this area are only viewable in VHIE Portal.</p> <p style="text-align: center;">Figure 29: VHIE Portal—“Patient Detail” Screen: Viewing Comments</p>  <p>The screenshot shows the 'Patient Detail' screen with a table of patient information and a list of comments. The top comment is highlighted with a red dashed box.</p> <table border="1"> <thead> <tr> <th>Last Name</th> <th>First Name</th> <th>MI</th> <th>Gender</th> <th>Date of Birth</th> <th>Multiple</th> <th>SSN</th> <th>ICN</th> <th>Address</th> <th>Phone</th> <th>Preferred Facility</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>3000 Test Street</td> <td></td> <td></td> </tr> </tbody> </table> <p>Consent Status Comments Generate Documents Facilities</p> <p>ADD COMMENT Display All Display ▼</p> <table border="1"> <thead> <tr> <th>Date Time</th> <th>User</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>2020/03/23 15:21:35 EDT</td> <td>vacolyi</td> <td>Comment about patient.</td> </tr> <tr> <td>2020/03/23 15:17:10 EDT</td> <td>vacolyi</td> <td>Test</td> </tr> </tbody> </table>	Last Name	First Name	MI	Gender	Date of Birth	Multiple	SSN	ICN	Address	Phone	Preferred Facility									3000 Test Street			Date Time	User	Comment	2020/03/23 15:21:35 EDT	vacolyi	Comment about patient.	2020/03/23 15:17:10 EDT	vacolyi	Test
Last Name	First Name	MI	Gender	Date of Birth	Multiple	SSN	ICN	Address	Phone	Preferred Facility																						
								3000 Test Street																								
Date Time	User	Comment																														
2020/03/23 15:21:35 EDT	vacolyi	Comment about patient.																														
2020/03/23 15:17:10 EDT	vacolyi	Test																														

4.5 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)**

4.5.1 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.



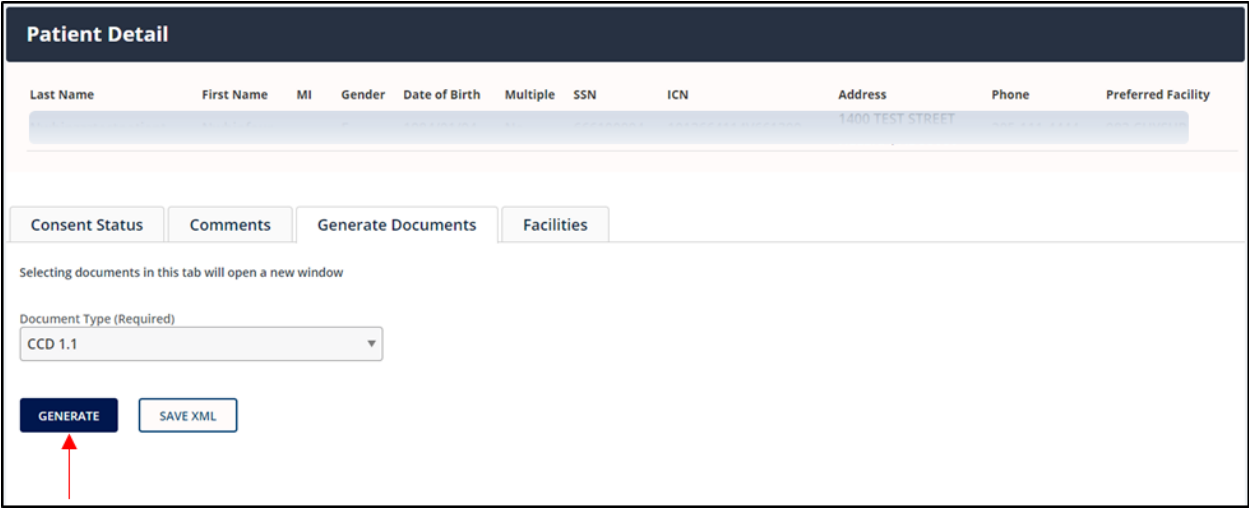
NOTE:

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**.

4. 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.

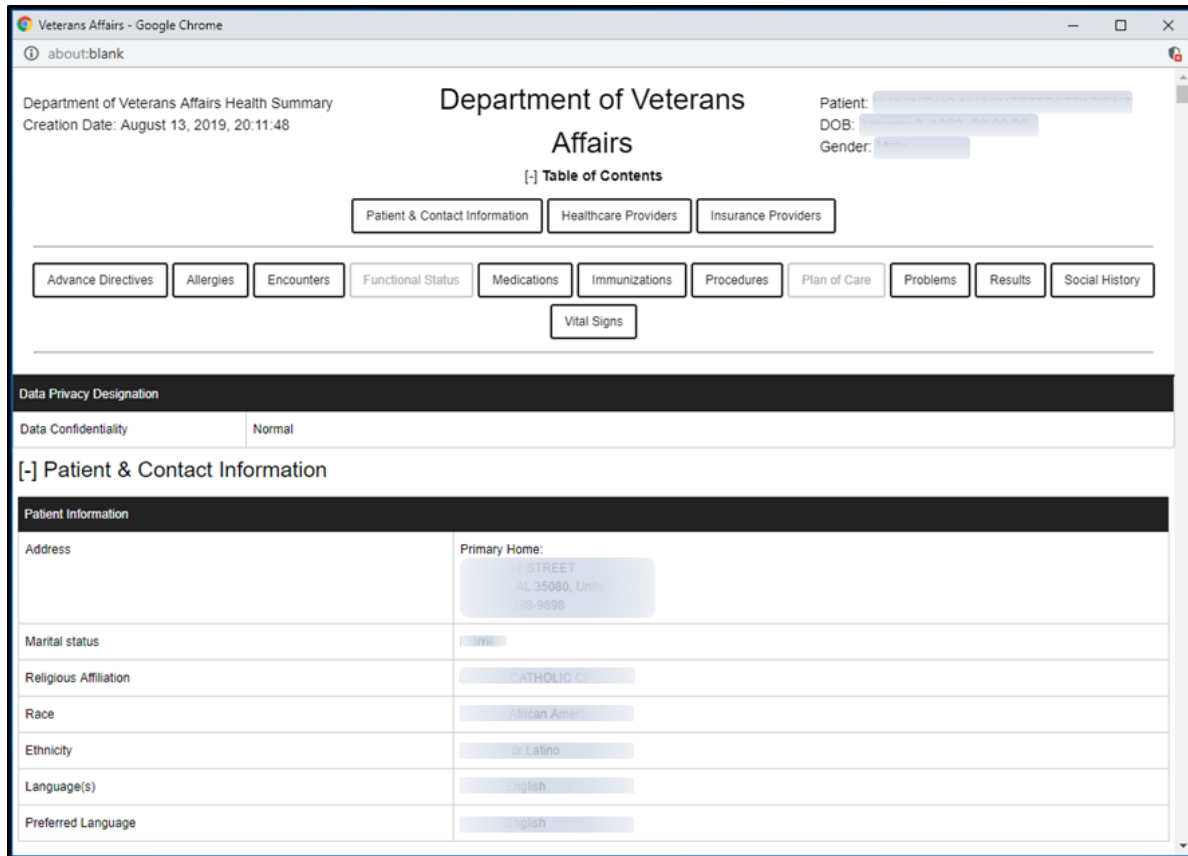
Table 7: Generate CCD 1.1, CCD 2.1, and C32

Step	Action
1.	<p>Under the Generate Documents tab, select CCD 1.1, CCD 2.1, or C32 as the Document Type and select Generate (Figure 30).</p> <p style="text-align: center;">Figure 30: VHIE Portal—Generate Documents Tab: Generate CCD 1.1, CCD 2.1, and C32</p>  <p>The screenshot shows a 'Patient Detail' header with fields for Last Name, First Name, MI, Gender, Date of Birth, Multiple, SSN, ICN, Address (1400 TEST STREET), Phone, and Preferred Facility. Below this are tabs for 'Consent Status', 'Comments', 'Generate Documents', and 'Facilities'. A note states 'Selecting documents in this tab will open a new window'. Underneath, there is a 'Document Type (Required)' dropdown menu with 'CCD 1.1' selected. At the bottom, there are two buttons: 'GENERATE' (highlighted with a red arrow) and 'SAVE XML'.</p>

Step	Action
------	--------

2.	If available, the selected health document (Figure 31) will generate in a new browser window.
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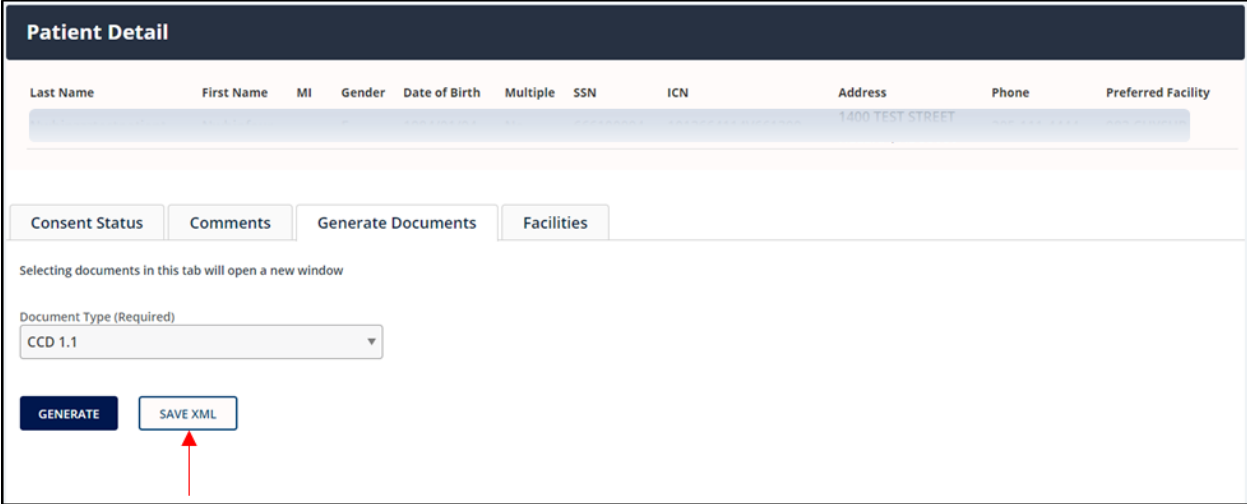
Figure 31: Sample Health Summary Document



Step	Action
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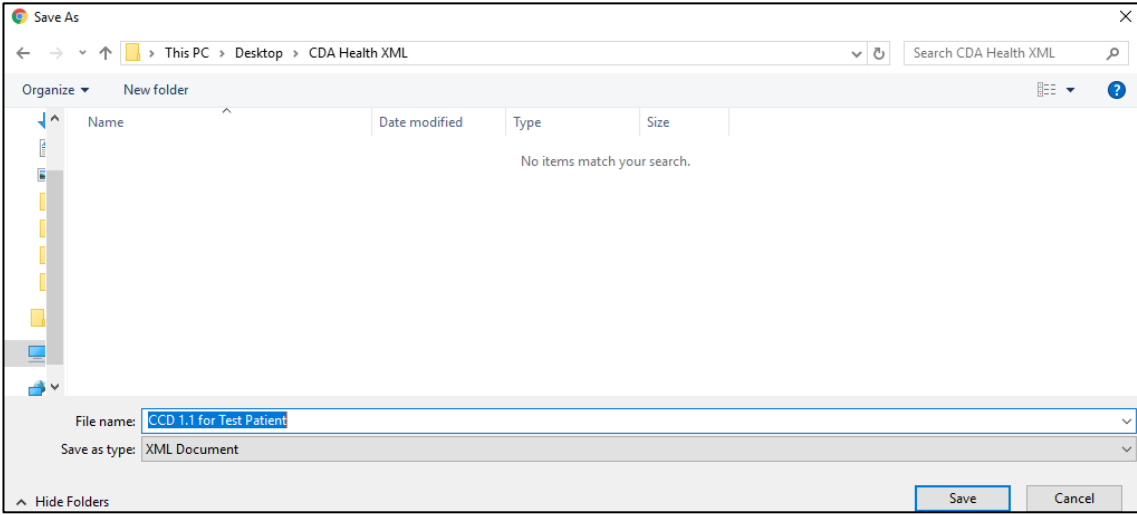
3. To download the **CCD 1.1**, **CCD 2.1**, or **C32** as an XML, select the document under the **Document Type** field and select **Save XML** ([Figure 32](#)).

Figure 32: 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](#)).

Figure 33: Sample Dialog to Save XML Document



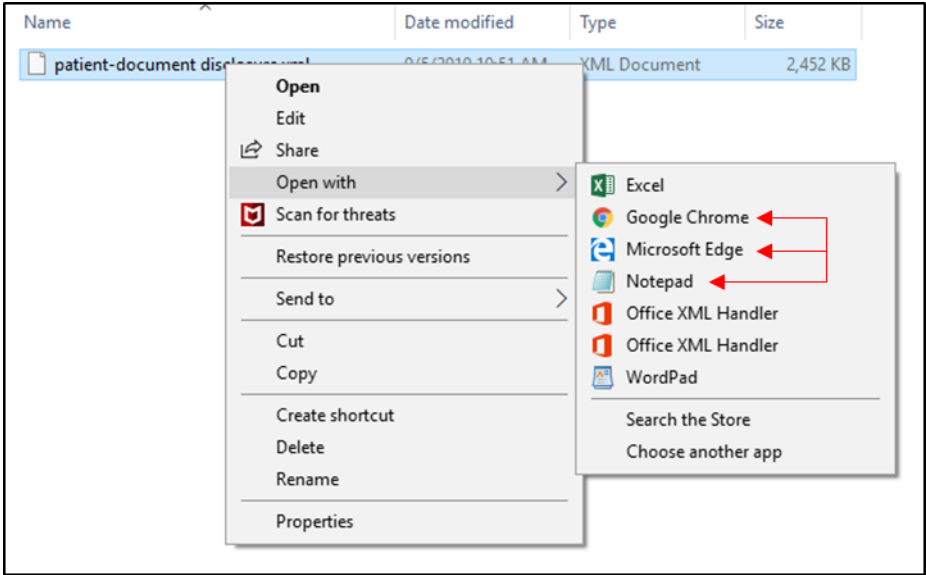

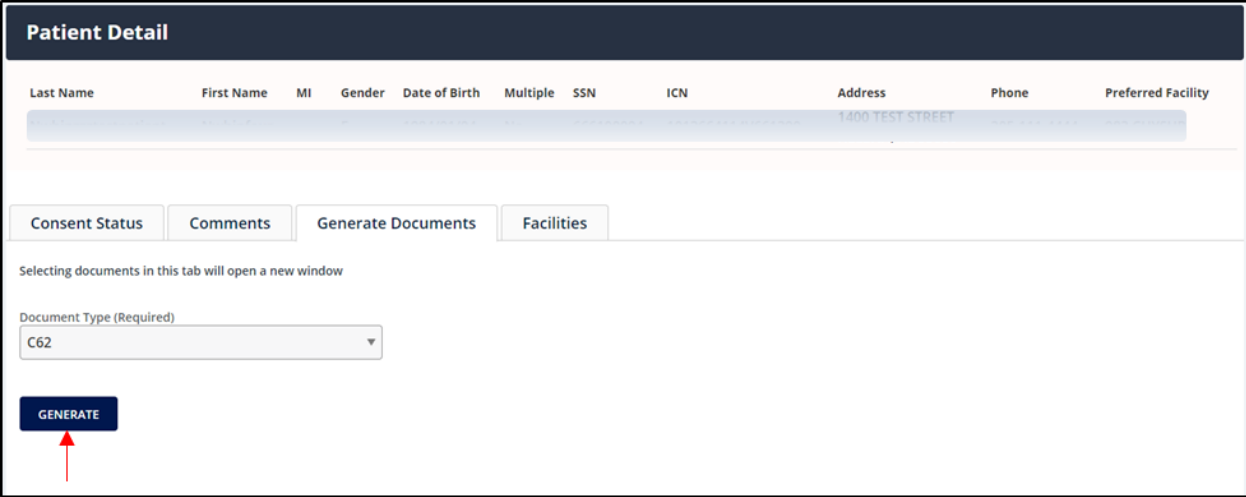
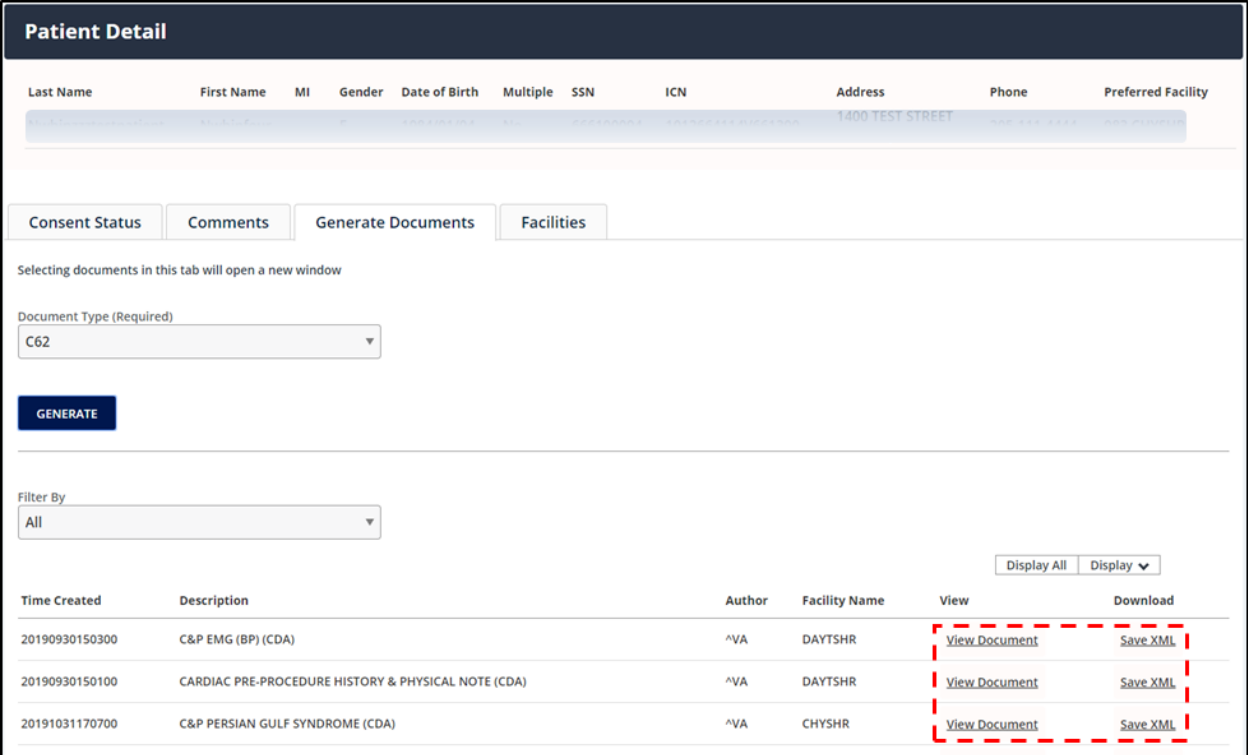
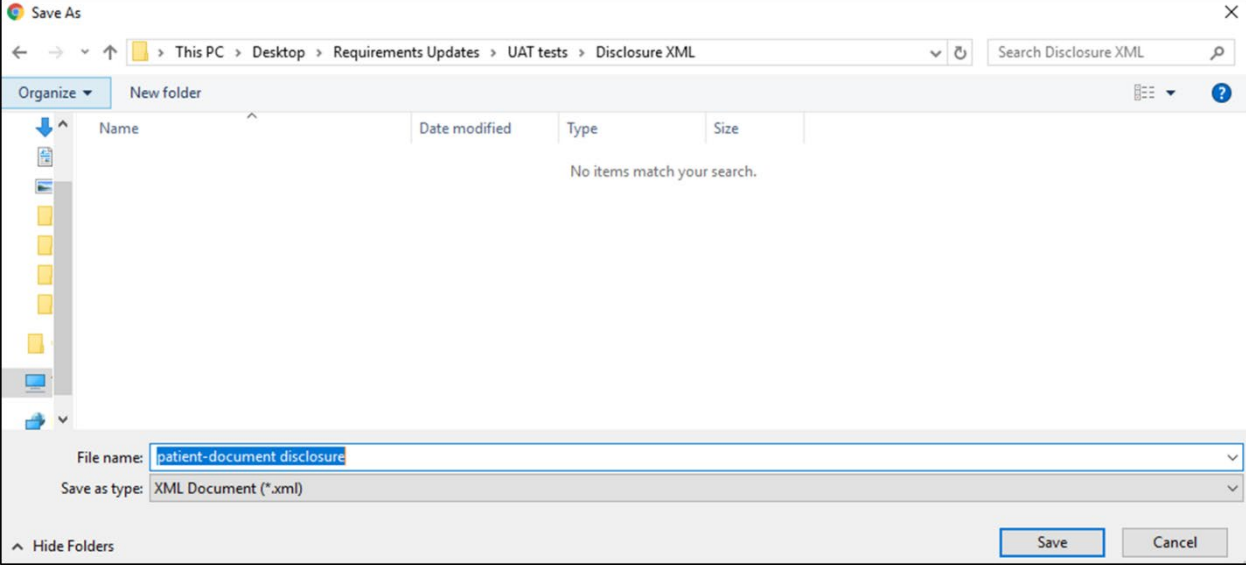
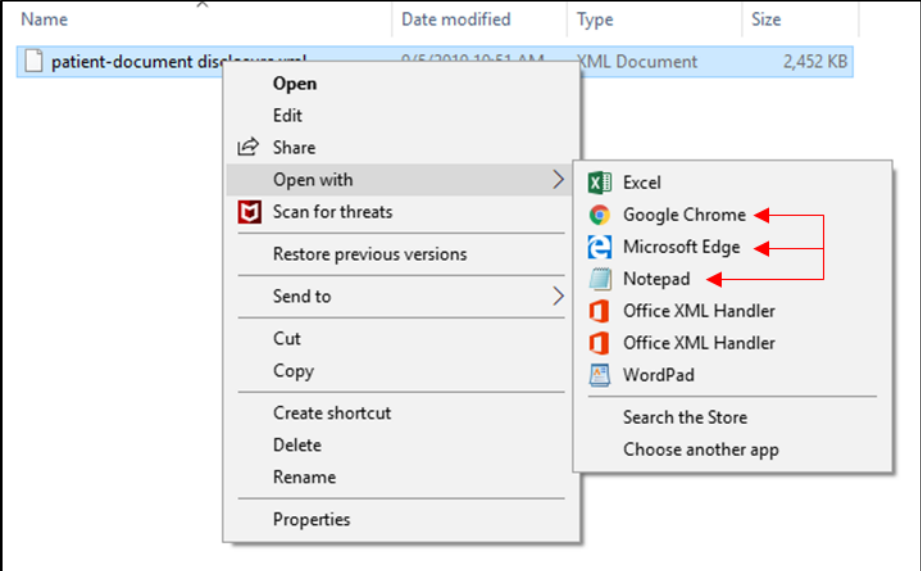
Step	Action
5.	<p>If using Google Chrome as the browser, the user <i>must</i> open the saved file using Google Chrome or another XML viewer application (e.g., Microsoft [MS] Edge or Notepad), see Figure 34.</p> <p>i NOTE: If the user is using Internet Explorer (IE) as the browser when downloading the XML, this step is <i>not</i> necessary as IE is used as the default browser for the XML viewer.</p> <p>For more information, see Section 5, “Troubleshooting.”</p> <p style="text-align: center;">Figure 34: Selecting Tool to Open XML File</p> 

Table 8: Generate C62 and SES

Step	Action
1.	<p>Under the Generate Documents tab, select either C62 or Encounter Summary as the Document Type and select Generate (Figure 35).</p> <p> 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 <i>not</i> doing for the C62.</p> <p style="text-align: center;">Figure 35: VHIE Portal—Generate Documents Tab: Generating a C62 File</p> 

Step	Action																								
2.	<p>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).</p> <p>i 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.</p> <p style="text-align: center;">Figure 36: VHIE Portal—Generate Documents Tab: Reviewing Documents</p>  <p>The screenshot shows the 'Patient Detail' section with fields for Last Name, First Name, MI, Gender, Date of Birth, Multiple, SSN, ICN, Address (1400 TEST STREET), Phone, and Preferred Facility. Below this are tabs for Consent Status, Comments, Generate Documents, and Facilities. A 'GENERATE' button is present. A table lists documents with columns for Time Created, Description, Author, Facility Name, View, and Download. The 'View' and 'Download' columns contain 'View Document' and 'Save XML' links, which are highlighted by a red dashed box in the original image.</p> <table border="1" data-bbox="332 1129 1550 1318"> <thead> <tr> <th>Time Created</th> <th>Description</th> <th>Author</th> <th>Facility Name</th> <th>View</th> <th>Download</th> </tr> </thead> <tbody> <tr> <td>20190930150300</td> <td>C&P EMG (BP) (CDA)</td> <td>^VA</td> <td>DAYTSHR</td> <td>View Document</td> <td>Save XML</td> </tr> <tr> <td>20190930150100</td> <td>CARDIAC PRE-PROCEDURE HISTORY & PHYSICAL NOTE (CDA)</td> <td>^VA</td> <td>DAYTSHR</td> <td>View Document</td> <td>Save XML</td> </tr> <tr> <td>20191031170700</td> <td>C&P PERSIAN GULF SYNDROME (CDA)</td> <td>^VA</td> <td>CHYSHR</td> <td>View Document</td> <td>Save XML</td> </tr> </tbody> </table>	Time Created	Description	Author	Facility Name	View	Download	20190930150300	C&P EMG (BP) (CDA)	^VA	DAYTSHR	View Document	Save XML	20190930150100	CARDIAC PRE-PROCEDURE HISTORY & PHYSICAL NOTE (CDA)	^VA	DAYTSHR	View Document	Save XML	20191031170700	C&P PERSIAN GULF SYNDROME (CDA)	^VA	CHYSHR	View Document	Save XML
Time Created	Description	Author	Facility Name	View	Download																				
20190930150300	C&P EMG (BP) (CDA)	^VA	DAYTSHR	View Document	Save XML																				
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20191031170700	C&P PERSIAN GULF SYNDROME (CDA)	^VA	CHYSHR	View Document	Save XML																				

Step	Action
3.	<p>When downloading the XML, Save the file as an XML type (Figure 37).</p> <p style="text-align: center;">Figure 37: Downloading and Saving XML File</p>  <p>The screenshot shows a 'Save As' dialog box in Windows. The address bar shows the path: 'This PC > Desktop > Requirements Updates > UAT tests > Disclosure XML'. The file name field contains 'patient-document disclosure' and the 'Save as type' dropdown is set to 'XML Document (*.xml)'. The 'Save' button is highlighted with a blue border.</p>

Step	Action
4.	<p>If using Google Chrome as the browser, the user <i>must</i> open the saved file using Google Chrome or another XML viewer application (e.g., MS Edge or Notepad), see Figure 38.</p> <p>i NOTE: If the user is using IE as the browser when downloading the XML, this step is <i>not</i> necessary as IE is used as the default browser for the XML viewer. For more information, see Section 5, "Troubleshooting."</p> <p style="text-align: center;">Figure 38: Selecting Tool to Open XML File</p> 

4.6 Facilities Tab

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



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

4.6.1 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

Facility VISN Number	Facility Station Number	Facility Name	Facility Children VAMC Names
VISN 1 - VA New England Healthcare System	983	CHYSHR	538 - CHILICOTHE OH VAMC 517 - BECKLEY VAMC 992 - CHYSQAS
VISN 2 - VA Healthcare Network Upstate New York	984	DAYSHR	610 - NORTHERN INDIANA HEALTH CARE SYSTEM - MARION DIVISION 565 - FAYETTEVILLE NC VAMC 402 - MAINE VA HCS

4.7 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) to return to the default “Patient Search” page.

4.7.1 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

Facility VISN Number	Facility Station Number	Facility Name	Facility Children VAMC Names
VISN 1 - VA New England Healthcare System	983	CHYSHR	538 - CHILLICOTHE OH VAMC 517 - BECKLEY VAMC 992 - CHYSQAS
VISN 2 - VA Healthcare Network Upstate New York	984	DAYTSHR	610 - NORTHERN INDIANA HEALTH CARE SYSTEM - MARION DIVISION 565 - FAYETTEVILLE NC VAMC 402 - MAINE VA HCS

4.8 Reports—Dashboard Widgets

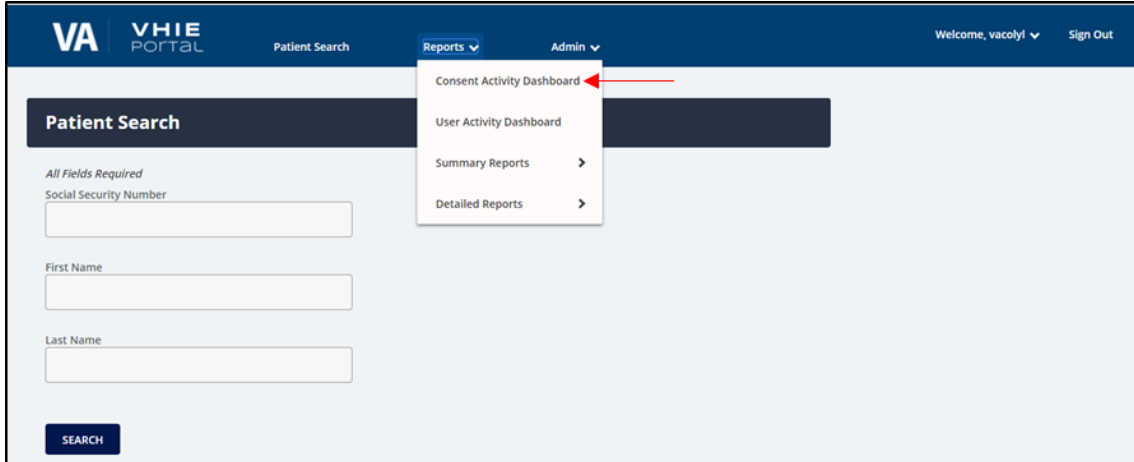
From within the VHIE Portal, a VHIE user can select the **Reports** option at the top of the web page (Figure 41) to select and generate either of the following dashboards:

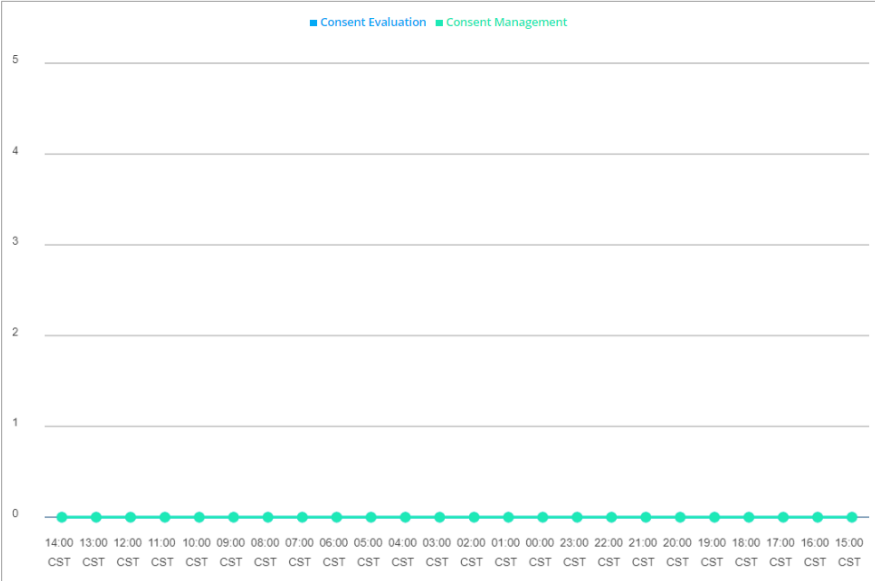
- **Consent Activity Dashboard**—Displays the number of web calls made to the VHIE Portal within the past **24-hours**.
- **User Activity Dashboard**—Displays the number of user logins to the VHIE Portal within the past **24-hours**.

4.8.1 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

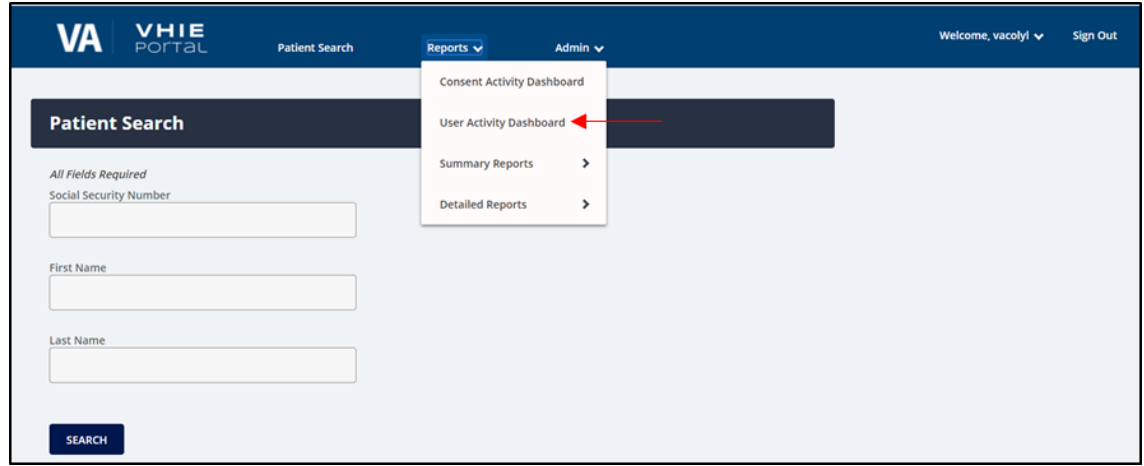
Step	Action
1.	<p>To generate the Consent Activity Dashboard, under the Reports menu, select Consent Activity Dashboard (Figure 41).</p> <p style="text-align: center;">Figure 41: VHIE Portal—Selecting Consent Activity Dashboard Report</p>  <p>The screenshot shows the VHIE Portal interface. At the top, there is a dark blue header with the VA logo, 'VHIE PORTAL', 'Patient Search', 'Reports', and 'Admin' menus. The 'Reports' menu is open, showing a list of options: 'Consent Activity Dashboard', 'User Activity Dashboard', 'Summary Reports', and 'Detailed Reports'. A red arrow points to the 'Consent Activity Dashboard' option. Below the header, there is a 'Patient Search' section with input fields for Social Security Number, First Name, and Last Name, and a 'SEARCH' button.</p>

Step	Action																																																																								
2.	<p>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 42).</p> <p style="text-align: center;">Figure 42: Consent Activity Dashboard—Sample Web Calls within 24 Hours Report</p> <div data-bbox="321 457 1453 1249" style="border: 1px solid black; padding: 5px;"> <p>Consent Activity Dashboard</p> <p>The information displayed are for all facilities. Times are in CST.</p> <p>VHIE Portal Application Web Calls (within 24 hours)</p>  <table border="1" data-bbox="1218 651 1445 1249"> <thead> <tr> <th>Time</th> <th>Consent Evaluation</th> <th>Consent Management</th> </tr> </thead> <tbody> <tr><td>08/23 14:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 13:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 12:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 11:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 10:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 09:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 08:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 07:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 06:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 05:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 04:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 03:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 02:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 01:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 00:00</td><td>0</td><td>0</td></tr> <tr><td>08/22 23:00</td><td>0</td><td>0</td></tr> <tr><td>08/22 22:00</td><td>0</td><td>0</td></tr> <tr><td>08/22 21:00</td><td>0</td><td>0</td></tr> <tr><td>08/22 20:00</td><td>0</td><td>0</td></tr> <tr><td>08/22 19:00</td><td>0</td><td>0</td></tr> <tr><td>08/22 18:00</td><td>0</td><td>0</td></tr> <tr><td>08/22 17:00</td><td>0</td><td>0</td></tr> <tr><td>08/22 16:00</td><td>0</td><td>0</td></tr> </tbody> </table> </div>	Time	Consent Evaluation	Consent Management	08/23 14:00	0	0	08/23 13:00	0	0	08/23 12:00	0	0	08/23 11:00	0	0	08/23 10:00	0	0	08/23 09:00	0	0	08/23 08:00	0	0	08/23 07:00	0	0	08/23 06:00	0	0	08/23 05:00	0	0	08/23 04:00	0	0	08/23 03:00	0	0	08/23 02:00	0	0	08/23 01:00	0	0	08/23 00:00	0	0	08/22 23:00	0	0	08/22 22:00	0	0	08/22 21:00	0	0	08/22 20:00	0	0	08/22 19:00	0	0	08/22 18:00	0	0	08/22 17:00	0	0	08/22 16:00	0	0
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Step	Action
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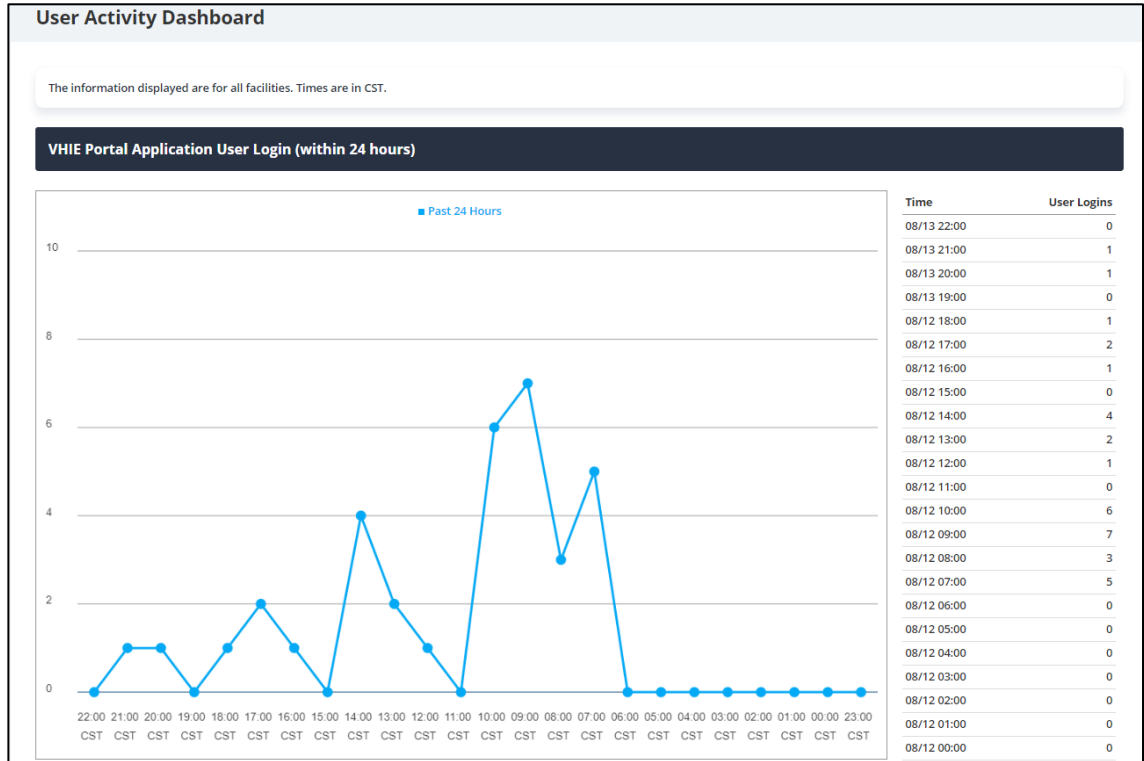
- To generate the **User Activity Dashboard**, under the **Reports** menu, select **User Activity Dashboard** ([Figure 43](#)).

Figure 43: VHIE Portal—Selecting User Activity Dashboard Report



- 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](#)).

Figure 44: User Activity Dashboard—Sample User Logins within Past 24 Hours Report



4.9 Reports—Detailed HIE and Consent Reports

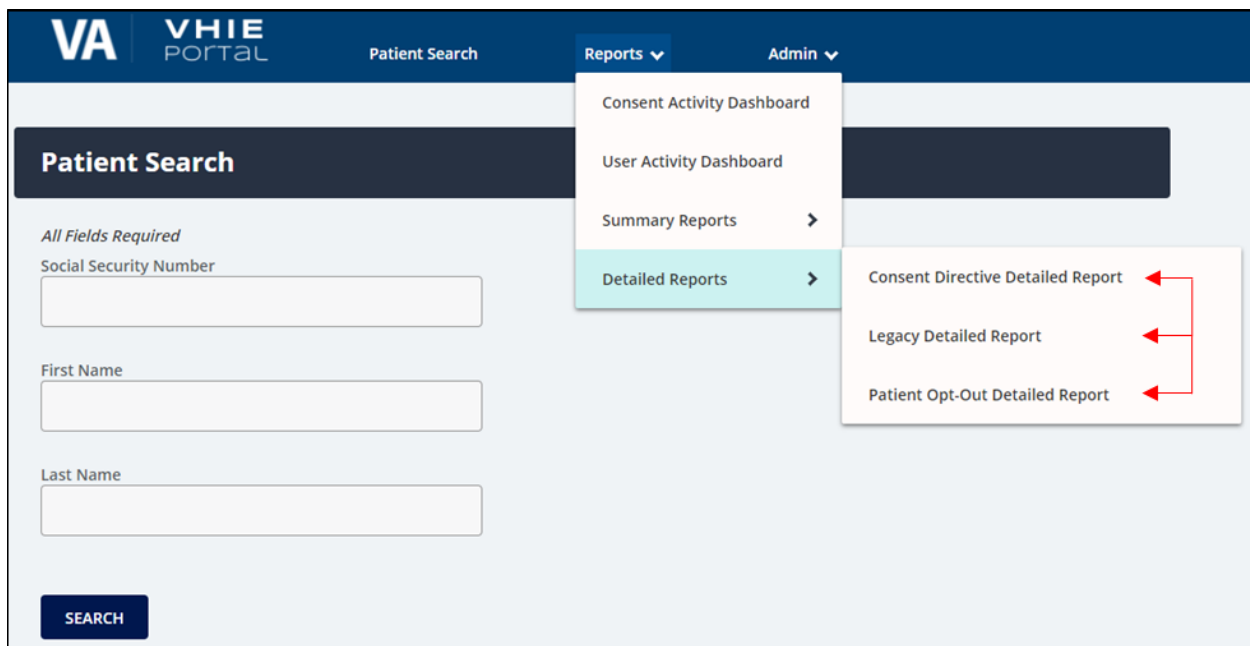
From within the VHIE Portal, a VHIE user can select the **Reports** option at the top of the web page (Figure 45) to select and generate the Detailed HIE and Consent Reports. The Detailed HIE and Consent Reports includes the following:

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

4.9.1 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.

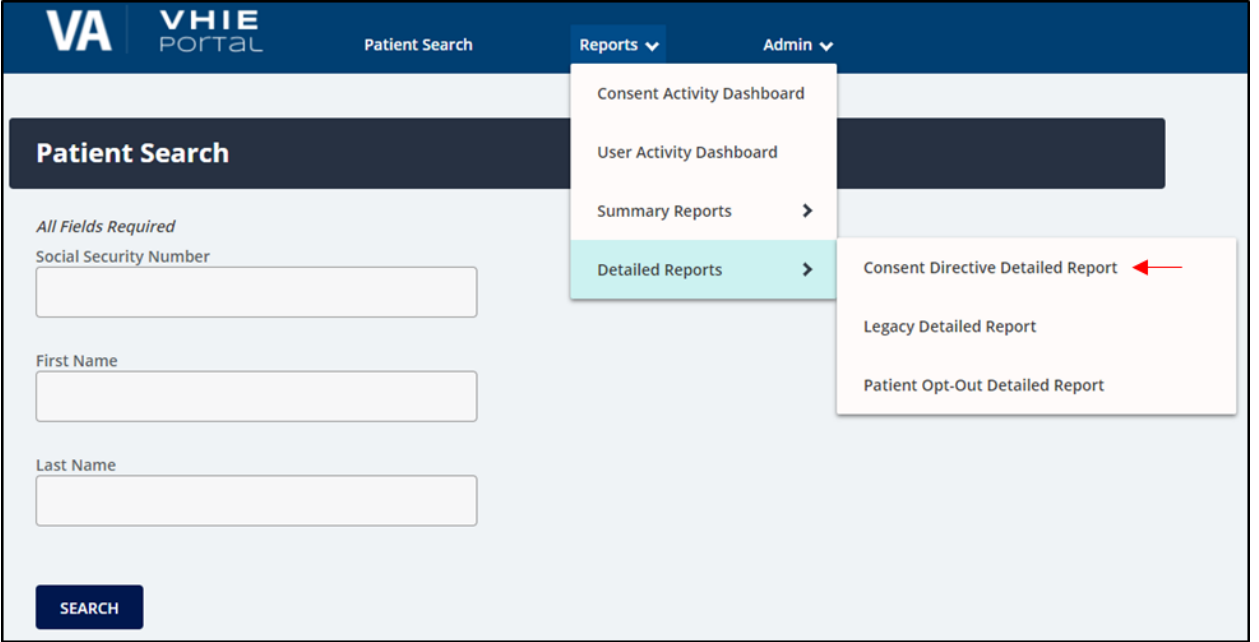
Figure 45: Detailed Reports Menu—Selecting Detailed HIE and Consent Reports




4.9.2 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.	<p data-bbox="297 535 1549 604">From the Reports menu, select Detailed Reports, and then select Consent Directive Detailed Report (Figure 46).</p> <p data-bbox="415 659 1422 695">Figure 46: Detailed Reports Menu—Selecting Consent Directive Detailed Report</p>  <p>The screenshot shows the VA VHI Portal interface. At the top, there is a navigation bar with 'VA VHI PORTAL', 'Patient Search', 'Reports', and 'Admin'. The 'Reports' dropdown menu is open, showing options: 'Consent Activity Dashboard', 'User Activity Dashboard', 'Summary Reports', and 'Detailed Reports'. The 'Detailed Reports' option is highlighted in light blue. A secondary dropdown menu is open from 'Detailed Reports', listing 'Consent Directive Detailed Report' (indicated by a red arrow), 'Legacy Detailed Report', and 'Patient Opt-Out Detailed Report'. On the left side of the page, there is a 'Patient Search' section with input fields for 'Social Security Number', 'First Name', and 'Last Name', and a 'SEARCH' button.</p>

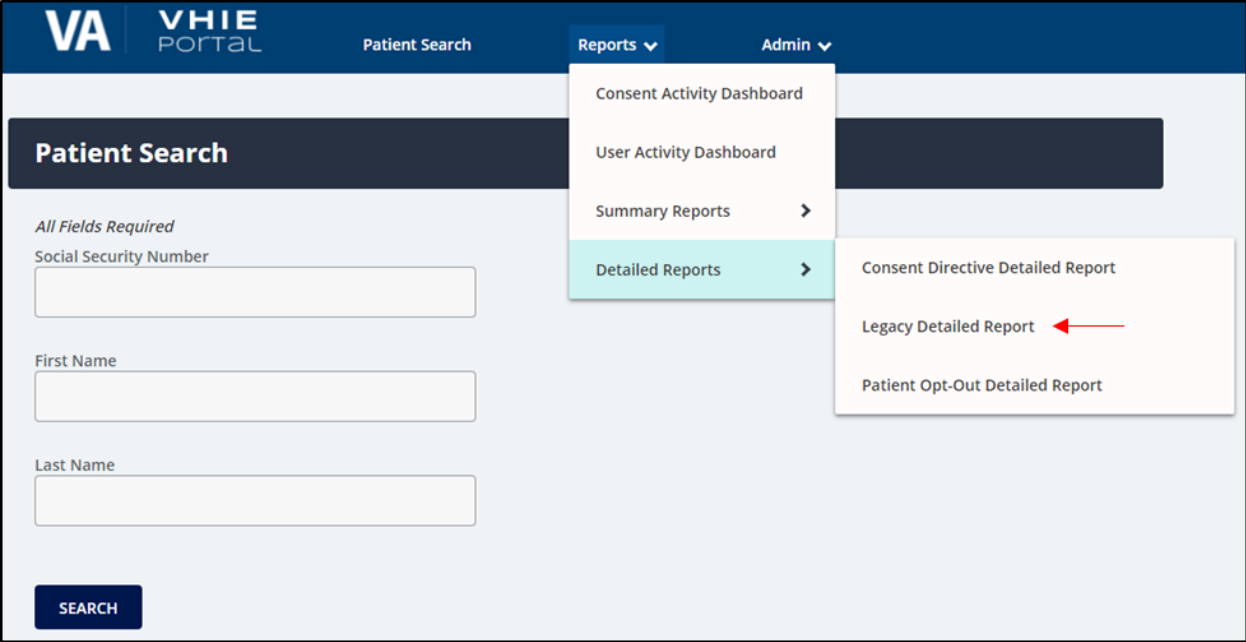
Step	Action
2.	<p data-bbox="297 254 1240 285">Complete the appropriate search criteria, then select Search (Figure 47).</p> <p data-bbox="464 348 1370 380" style="text-align: center;">Figure 47: Consent Directive Detailed Report—Selecting Search Criteria</p> <div data-bbox="656 394 1179 1346" style="border: 1px solid black; padding: 10px;"> <p data-bbox="695 401 1110 426" style="text-align: center;">Consent Directive Report - Detailed</p> <p data-bbox="695 464 857 485">Authenticating Facilities</p> <div data-bbox="695 485 1146 632"> <input data-bbox="695 485 1032 632" type="text" value="All"/> <input data-bbox="1052 485 1146 520" type="button" value="Select..."/> </div> <p data-bbox="695 653 789 674">Consent Type</p> <div data-bbox="695 674 1032 709"> <input data-bbox="695 674 1032 709" type="text" value="All"/> </div> <p data-bbox="695 730 781 751">Patient Type</p> <div data-bbox="695 751 1032 787"> <input data-bbox="695 751 1032 787" type="text" value="Real Patients"/> </div> <p data-bbox="695 808 748 829">User Id</p> <div data-bbox="695 829 1032 865"> <input data-bbox="695 829 1032 865" type="text"/> </div> <p data-bbox="695 886 850 907">Social Security Number</p> <div data-bbox="695 907 1032 942"> <input data-bbox="695 907 1032 942" type="text"/> </div> <p data-bbox="695 963 773 984">First Name</p> <div data-bbox="695 984 1032 1020"> <input data-bbox="695 984 1032 1020" type="text"/> </div> <p data-bbox="695 1041 769 1062">Last Name</p> <div data-bbox="695 1062 1032 1098"> <input data-bbox="695 1062 1032 1098" type="text"/> </div> <p data-bbox="695 1119 724 1140">ICN</p> <div data-bbox="695 1140 1032 1176"> <input data-bbox="695 1140 1032 1176" type="text"/> </div> <p data-bbox="695 1197 837 1218">Start Date (Required)</p> <div data-bbox="695 1218 857 1262"> <input data-bbox="695 1218 857 1253" type="text" value="2019/07/14"/> <small>YYYYMMDD</small> </div> <p data-bbox="870 1197 935 1218">End Date</p> <div data-bbox="870 1218 1032 1262"> <input data-bbox="870 1218 1032 1253" type="text" value="2019/08/13"/> <small>YYYYMMDD</small> </div> <p data-bbox="695 1304 773 1325" style="text-align: center;">SEARCH ←</p> </div>

Step	Action																																																																	
3.	<p>In the returned results, the user can export the report to a .CSV (Comma-Separated Values) file by selecting Export CSV (Figure 48).</p> <p style="text-align: center;">Figure 48: Sample Consent Directive Detailed Report—Exporting to a CSV File</p>  <p>The screenshot shows a table with the following columns: SSN, ICN, Last Name, First Name, Time of Event, Signature Date, Purpose of Use, Consent Type, Reason, User Id, Authorizing Facility, VISN, and View. The table contains four rows of data. A red arrow points to the 'Export CSV (Rows 1 to 25)' button located at the top right of the table area. Other buttons visible are 'Display All' and 'Display' with a dropdown arrow.</p> <table border="1" data-bbox="297 426 1539 741"> <thead> <tr> <th>SSN</th> <th>ICN</th> <th>Last Name</th> <th>First Name</th> <th>Time of Event</th> <th>Signature Date</th> <th>Purpose of Use</th> <th>Consent Type</th> <th>Reason</th> <th>User Id</th> <th>Authorizing Facility</th> <th>VISN</th> <th>View</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td>2020/03/25 17:25:27 EDT</td> <td>2020/03/25</td> <td>TREATMENT</td> <td>eHealth Exchange Opt-out</td> <td>Opt-out</td> <td>vhie_operator</td> <td>CHYSHR</td> <td>VISN 1 - VA New England Healthcare System</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td>2020/03/25 17:24:28 EDT</td> <td>2020/03/25</td> <td>TREATMENT</td> <td>eHealth Exchange Re-participate</td> <td>Re-participate</td> <td>vhie_operator</td> <td>CHYSHR</td> <td>VISN 1 - VA New England Healthcare System</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td>2020/03/25 17:22:19 EDT</td> <td>2020/03/25</td> <td>TREATMENT</td> <td>eHealth Exchange Opt-out</td> <td>Opt-out</td> <td>vhie_operator</td> <td>CHYSHR</td> <td>VISN 1 - VA New England Healthcare System</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td>2020/03/25 16:05:32 EDT</td> <td>2020/03/25</td> <td>TREATMENT</td> <td>eHealth Exchange Re-participate</td> <td>Re-participate</td> <td>vhie_operator</td> <td>CHYSHR</td> <td>VISN 1 - VA New England Healthcare System</td> <td></td> </tr> </tbody> </table>	SSN	ICN	Last Name	First Name	Time of Event	Signature Date	Purpose of Use	Consent Type	Reason	User Id	Authorizing Facility	VISN	View					2020/03/25 17:25:27 EDT	2020/03/25	TREATMENT	eHealth Exchange Opt-out	Opt-out	vhie_operator	CHYSHR	VISN 1 - VA New England Healthcare System						2020/03/25 17:24:28 EDT	2020/03/25	TREATMENT	eHealth Exchange Re-participate	Re-participate	vhie_operator	CHYSHR	VISN 1 - VA New England Healthcare System						2020/03/25 17:22:19 EDT	2020/03/25	TREATMENT	eHealth Exchange Opt-out	Opt-out	vhie_operator	CHYSHR	VISN 1 - VA New England Healthcare System						2020/03/25 16:05:32 EDT	2020/03/25	TREATMENT	eHealth Exchange Re-participate	Re-participate	vhie_operator	CHYSHR	VISN 1 - VA New England Healthcare System	
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4.9.3 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.	<p data-bbox="321 535 1518 604">From the Reports menu, select Detailed Reports, and then select Legacy Detailed Report (Figure 49).</p> <p data-bbox="506 661 1377 695" style="text-align: center;">Figure 49: Detailed Reports Menu—Selecting Legacy Detailed Report</p>  <p>The screenshot shows the VA VHIE Portal interface. At the top, there are navigation links for 'Patient Search', 'Reports', and 'Admin'. The 'Reports' dropdown menu is open, displaying options: 'Consent Activity Dashboard', 'User Activity Dashboard', 'Summary Reports', and 'Detailed Reports'. The 'Detailed Reports' option is highlighted in light blue. A sub-menu for 'Detailed Reports' is also open, showing 'Consent Directive Detailed Report', 'Legacy Detailed Report' (highlighted with a red arrow), and 'Patient Opt-Out Detailed Report'. On the left side of the page, there is a 'Patient Search' section with input fields for 'Social Security Number', 'First Name', and 'Last Name', and a 'SEARCH' button.</p>

Step	Action
------	--------

2. Complete the appropriate search criteria, then select **Search** ([Figure 50](#)).

Figure 50: 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](#)).

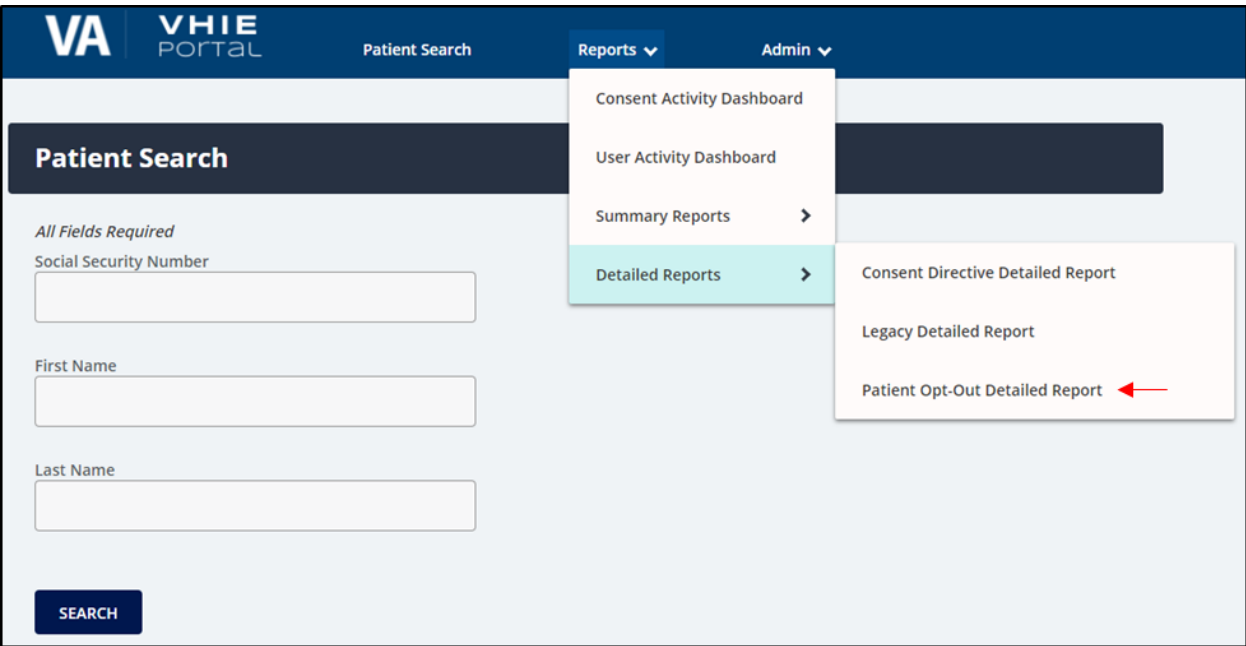
Figure 51: Sample Legacy Detailed Report—Exporting to a CSV File

SSN	ICN	Last Name	First Name	Time of Event	Signature Date	Purpose of Use	Consent Type	Reason	User Id	Authenticating Facility	VISN	View
				2019/07/26 07:00:30 CST	2019/07/26	TREATMENT	Legacy eHealth Authorization		vacosadup	DAYTSHR	VISN 2 - VA Healthcare Network Upstate New York	
				2019/07/26 06:49:31 CST	2019/07/26	TREATMENT	Legacy eHealth Revocation	Entered in Error	vacosadup	DAYTSHR	VISN 2 - VA Healthcare Network Upstate New York	
				2019/07/16 19:00:00 CST	2019/07/17	TREATMENT	Legacy eHealth Revocation	Authorization Expired	automatic service	ASHEVILLE VAMC	VISN 6 - VA Mid-Atlantic Health Care Network	

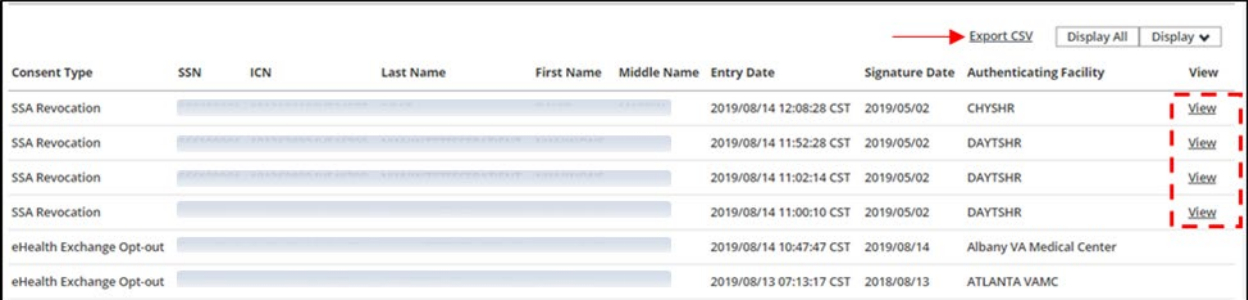
4.9.4 Patient Opt-Out Detailed Report

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.	<p>From the Reports menu, select Detailed Reports, and then select Patient Opt-Out Detailed Report (Figure 52).</p> <p style="text-align: center;">Figure 52: Detailed Reports Menu—Selecting Patient Opt-Out Detailed Report</p>  <p>The screenshot shows the VA VHIE Portal interface. At the top, there is a navigation bar with 'VA VHIE PORTAL' on the left, 'Patient Search' in the center, and 'Reports' and 'Admin' on the right. The 'Reports' dropdown menu is open, showing options: 'Consent Activity Dashboard', 'User Activity Dashboard', 'Summary Reports', and 'Detailed Reports'. The 'Detailed Reports' option is highlighted in light blue. A secondary dropdown menu is open from 'Detailed Reports', showing options: 'Consent Directive Detailed Report', 'Legacy Detailed Report', and 'Patient Opt-Out Detailed Report'. A red arrow points to the 'Patient Opt-Out Detailed Report' option. On the left side of the page, there is a 'Patient Search' section with input fields for 'Social Security Number', 'First Name', and 'Last Name', and a 'SEARCH' button.</p>

Step	Action
2.	<p>Complete the appropriate search criteria, and then select Search (Figure 53).</p> <p style="text-align: center;">Figure 53: Patient Opt-Out Detailed Report—Selecting Search Criteria</p> <div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Patient Opt-Out Report - Detailed</p> <p>Authenticating Facilities</p> <div style="display: flex; align-items: flex-start;"> <div style="border: 1px solid gray; padding: 5px; width: 250px; height: 80px; margin-right: 10px;">All</div> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;">Select...</div> </div> <p>Consent Type</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;">All ▼</div> <p>Patient Type</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;">Real Patients ▼</div> <p>User Id</p> <div style="border: 1px solid gray; padding: 5px; height: 20px; margin-bottom: 5px;"></div> <p>Selection Date</p> <p> <input checked="" type="radio"/> Entry Date <input type="radio"/> Signature Date </p> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> <div style="text-align: center;"> <p>Start Date (Required)</p> <div style="border: 1px solid gray; padding: 5px; width: 80px;">2019/07/15</div> <p><small>YYYYMMDD</small></p> </div> <div style="text-align: center;"> <p>End Date</p> <div style="border: 1px solid gray; padding: 5px; width: 80px;">2019/08/14</div> <p><small>YYYYMMDD</small></p> </div> </div> <div style="border: 1px solid gray; padding: 5px; text-align: center; margin-top: 10px; width: 60px; background-color: #003366; color: white;">SEARCH</div> <div style="margin-left: 10px; color: red;">←</div> </div>

Step	Action																																																																						
3.	<p>In the returned results for the Patient Opt-Out Detailed Report (Figure 54), the user can:</p> <ol style="list-style-type: none"> Export the report to a .CSV file by selecting Export CSV. View the SSA Portable Document Format (PDF) by selecting the View button next to the SSA consent. <p style="text-align: center;">Figure 54: Sample Patient Opt-Out Detailed Report—Export and View Options</p>  <table border="1" data-bbox="321 516 1562 814"> <thead> <tr> <th>Consent Type</th> <th>SSN</th> <th>ICN</th> <th>Last Name</th> <th>First Name</th> <th>Middle Name</th> <th>Entry Date</th> <th>Signature Date</th> <th>Authenticating Facility</th> <th>View</th> </tr> </thead> <tbody> <tr> <td>SSA Revocation</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>2019/08/14 12:08:28 CST</td> <td>2019/05/02</td> <td>CHYSHR</td> <td>View</td> </tr> <tr> <td>SSA Revocation</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>2019/08/14 11:52:28 CST</td> <td>2019/05/02</td> <td>DAYTSHR</td> <td>View</td> </tr> <tr> <td>SSA Revocation</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>2019/08/14 11:02:14 CST</td> <td>2019/05/02</td> <td>DAYTSHR</td> <td>View</td> </tr> <tr> <td>SSA Revocation</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>2019/08/14 11:00:10 CST</td> <td>2019/05/02</td> <td>DAYTSHR</td> <td>View</td> </tr> <tr> <td>eHealth Exchange Opt-out</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>2019/08/14 10:47:47 CST</td> <td>2019/08/14</td> <td>Albany VA Medical Center</td> <td></td> </tr> <tr> <td>eHealth Exchange Opt-out</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>2019/08/13 07:13:17 CST</td> <td>2018/08/13</td> <td>ATLANTA VAMC</td> <td></td> </tr> </tbody> </table>	Consent Type	SSN	ICN	Last Name	First Name	Middle Name	Entry Date	Signature Date	Authenticating Facility	View	SSA Revocation						2019/08/14 12:08:28 CST	2019/05/02	CHYSHR	View	SSA Revocation						2019/08/14 11:52:28 CST	2019/05/02	DAYTSHR	View	SSA Revocation						2019/08/14 11:02:14 CST	2019/05/02	DAYTSHR	View	SSA Revocation						2019/08/14 11:00:10 CST	2019/05/02	DAYTSHR	View	eHealth Exchange Opt-out						2019/08/14 10:47:47 CST	2019/08/14	Albany VA Medical Center		eHealth Exchange Opt-out						2019/08/13 07:13:17 CST	2018/08/13	ATLANTA VAMC	
Consent Type	SSN	ICN	Last Name	First Name	Middle Name	Entry Date	Signature Date	Authenticating Facility	View																																																														
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SSA Revocation						2019/08/14 11:02:14 CST	2019/05/02	DAYTSHR	View																																																														
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eHealth Exchange Opt-out						2019/08/13 07:13:17 CST	2018/08/13	ATLANTA VAMC																																																															

4.10 Reports—Summary HIE and Consent Reports

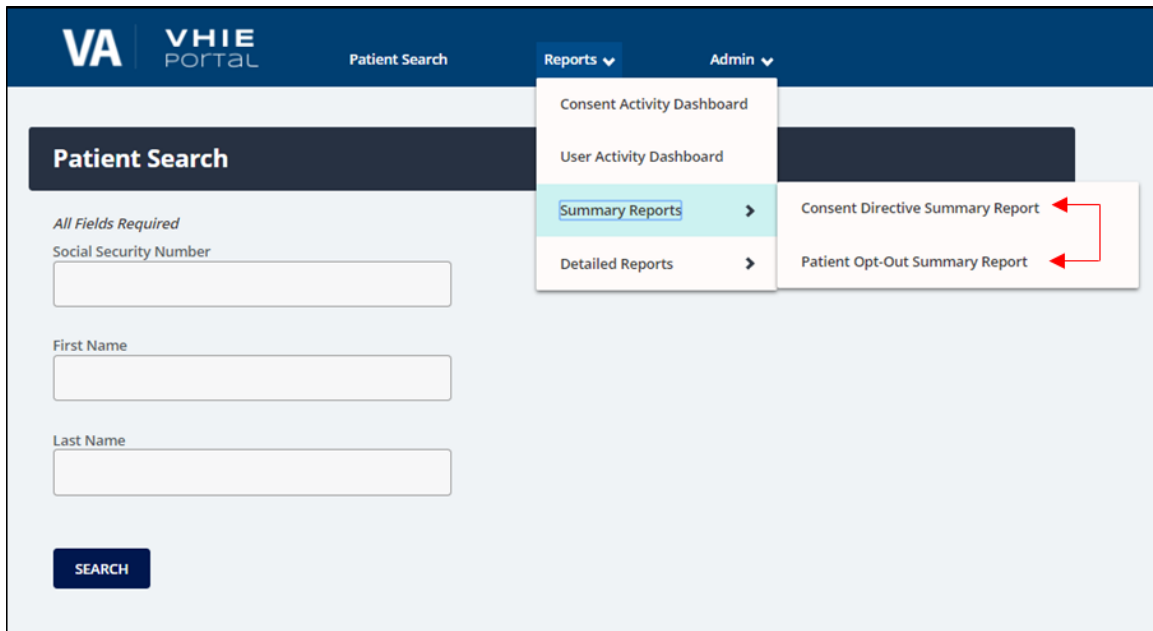
From within the VHIE Portal, a VHIE user can select the **Reports** option at the top of the web page ([Figure 55](#)) to select and generate the Summary HIE and Consent Reports. The Summary HIE and Consent Reports includes the following:

- **Consent Directive Summary Report**
- **Patient Opt-Out Summary Report**

4.10.1 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.

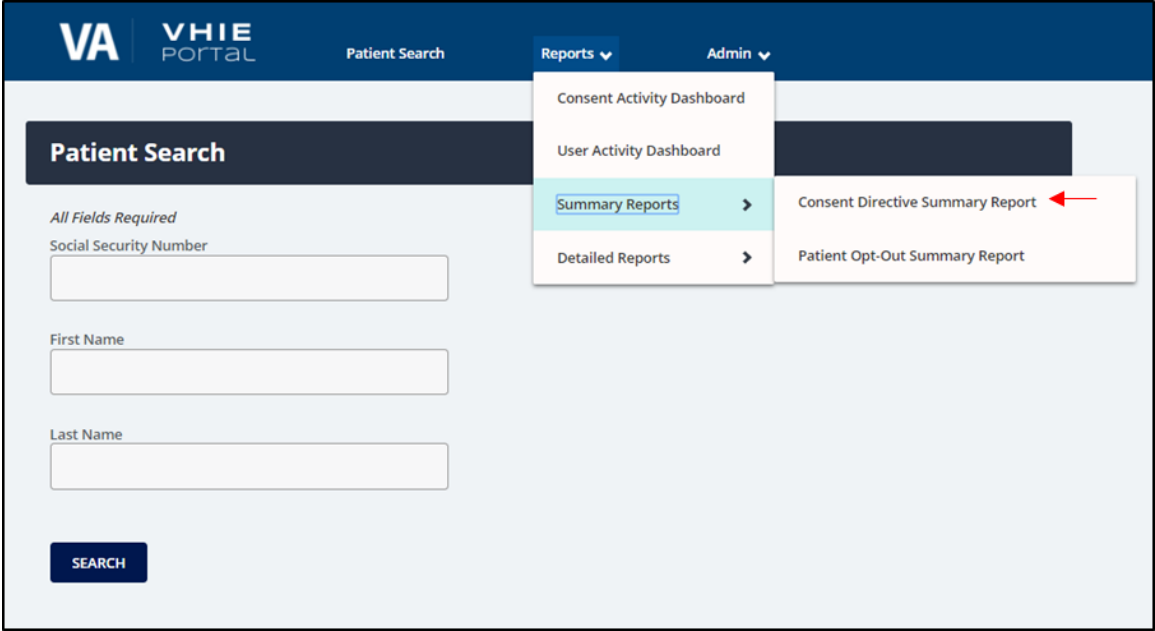
Figure 55: Reports Menu—Summary HIE and Consent Reports




4.10.2 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.	<p>From the Reports menu, select Consent Directive Summary Report (Figure 56).</p> <p style="text-align: center;">Figure 56: Summary Reports Menu—Selecting Consent Directive Summary Report</p>  <p>The screenshot shows the VA VHI Portal interface. At the top, there is a navigation bar with the VA logo, 'VHI PORTAL', and links for 'Patient Search', 'Reports', and 'Admin'. The 'Reports' dropdown menu is open, displaying options: 'Consent Activity Dashboard', 'User Activity Dashboard', 'Summary Reports', and 'Detailed Reports'. The 'Summary Reports' option is highlighted in light blue. A secondary dropdown menu is visible to the right of 'Summary Reports', listing 'Consent Directive Summary Report' and 'Patient Opt-Out Summary Report'. A red arrow points to the 'Consent Directive Summary Report' option.</p>

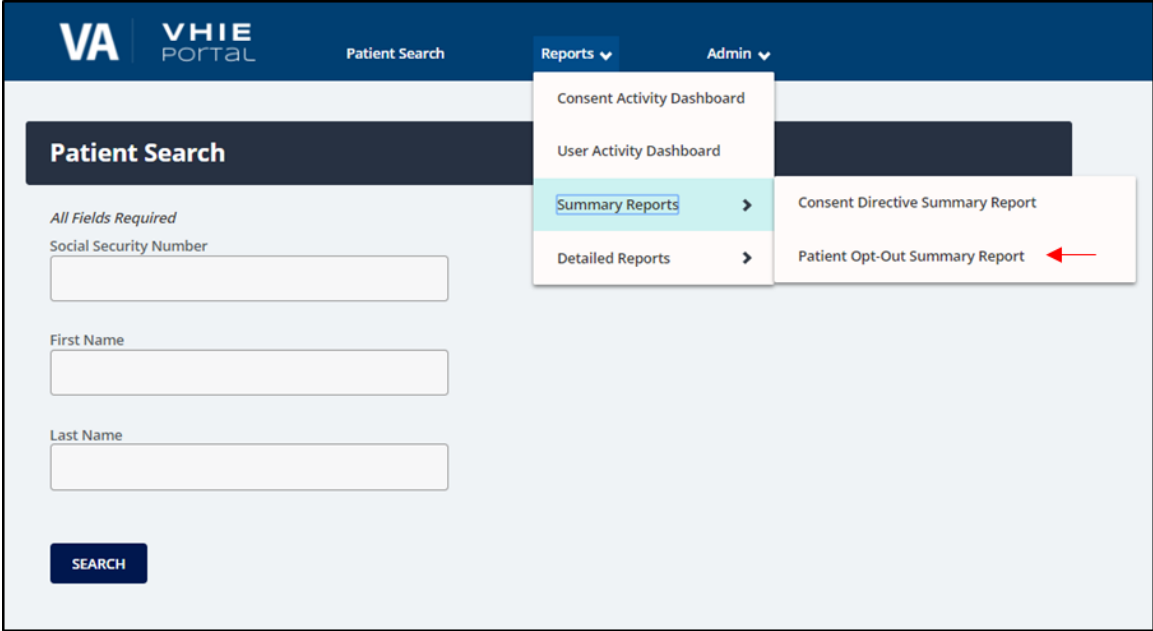
Step	Action
2.	<p>Complete the appropriate search criteria, and then select Search (Figure 57).</p> <p style="text-align: center;">Figure 57: Consent Directive Summary Report—Selecting Search Criteria</p> <div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p style="text-align: center;">Consent Directive Report - Summary</p> <p>Authenticating Facilities</p> <div style="display: flex; align-items: flex-start;"> <div style="border: 1px solid gray; padding: 5px; width: 300px; height: 100px; margin-right: 10px;">All</div> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;">Select...</div> </div> <p>Consent Type</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;">All ▼</div> <p>Patient Type</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;">Real Patients ▼</div> <p>User Id</p> <div style="border: 1px solid gray; padding: 5px; width: 300px; height: 25px; margin-bottom: 5px;"></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> <div> <p>Start Date (Required)</p> <div style="border: 1px solid gray; padding: 5px; width: 100px; margin-bottom: 5px;">2019/07/15</div> <p><small>YYYYMMDD</small></p> </div> <div> <p>End Date</p> <div style="border: 1px solid gray; padding: 5px; width: 100px; margin-bottom: 5px;">2019/08/14</div> <p><small>YYYYMMDD</small></p> </div> </div> <div style="text-align: center; margin-top: 10px;"> <div style="background-color: #003366; color: white; padding: 10px 20px; display: inline-block; border: 1px solid white;">SEARCH</div> ← </div> </div>

Step	Action																																													
3.	<p data-bbox="321 254 1516 321">In the returned results, the user can export the report to a .CSV file by selecting Export CSV (Figure 58).</p> <p data-bbox="436 380 1445 411" style="text-align: center;">Figure 58: Sample Consent Directive Summary Report—Exporting to a CSV File</p> <div data-bbox="321 426 1560 795" style="border: 1px solid black; padding: 5px;">  <table border="1" data-bbox="321 426 1560 795"> <thead> <tr> <th data-bbox="326 489 727 510">Authenticating Facility</th> <th data-bbox="732 489 971 510">eHealth Exchange Participating</th> <th data-bbox="976 489 1214 510">eHealth Exchange Not Participating</th> <th data-bbox="1219 489 1377 510">SSA Authorizations</th> <th data-bbox="1382 489 1539 510">SSA Revocations</th> </tr> </thead> <tbody> <tr> <td data-bbox="326 527 727 548">ALASKA VA HLTCR SYSTEM AVAHS</td> <td data-bbox="732 527 971 548">7</td> <td data-bbox="976 527 1214 548">8</td> <td data-bbox="1219 527 1377 548">0</td> <td data-bbox="1382 527 1539 548">0</td> </tr> <tr> <td data-bbox="326 558 727 579">Albany VA Medical Center</td> <td data-bbox="732 558 971 579">1</td> <td data-bbox="976 558 1214 579">7</td> <td data-bbox="1219 558 1377 579">6</td> <td data-bbox="1382 558 1539 579">0</td> </tr> <tr> <td data-bbox="326 590 727 611">ASHEVILLE VAMC</td> <td data-bbox="732 590 971 611">0</td> <td data-bbox="976 590 1214 611">0</td> <td data-bbox="1219 590 1377 611">93</td> <td data-bbox="1382 590 1539 611">0</td> </tr> <tr> <td data-bbox="326 621 727 642">ATLANTA VAMC</td> <td data-bbox="732 621 971 642">1</td> <td data-bbox="976 621 1214 642">1</td> <td data-bbox="1219 621 1377 642">0</td> <td data-bbox="1382 621 1539 642">0</td> </tr> <tr> <td data-bbox="326 653 727 674">BATTLE CREEK VA MEDICAL CENTER</td> <td data-bbox="732 653 971 674">0</td> <td data-bbox="976 653 1214 674">1</td> <td data-bbox="1219 653 1377 674">0</td> <td data-bbox="1382 653 1539 674">0</td> </tr> <tr> <td data-bbox="326 684 727 705">BOISE VAMROC</td> <td data-bbox="732 684 971 705">1</td> <td data-bbox="976 684 1214 705">0</td> <td data-bbox="1219 684 1377 705">0</td> <td data-bbox="1382 684 1539 705">0</td> </tr> <tr> <td data-bbox="326 716 727 737">BRANSON CBOC</td> <td data-bbox="732 716 971 737">0</td> <td data-bbox="976 716 1214 737">0</td> <td data-bbox="1219 716 1377 737">2</td> <td data-bbox="1382 716 1539 737">0</td> </tr> <tr> <td data-bbox="326 747 727 768">CHYSHR</td> <td data-bbox="732 747 971 768">6</td> <td data-bbox="976 747 1214 768">6</td> <td data-bbox="1219 747 1377 768">6</td> <td data-bbox="1382 747 1539 768">0</td> </tr> </tbody> </table> </div>	Authenticating Facility	eHealth Exchange Participating	eHealth Exchange Not Participating	SSA Authorizations	SSA Revocations	ALASKA VA HLTCR SYSTEM AVAHS	7	8	0	0	Albany VA Medical Center	1	7	6	0	ASHEVILLE VAMC	0	0	93	0	ATLANTA VAMC	1	1	0	0	BATTLE CREEK VA MEDICAL CENTER	0	1	0	0	BOISE VAMROC	1	0	0	0	BRANSON CBOC	0	0	2	0	CHYSHR	6	6	6	0
Authenticating Facility	eHealth Exchange Participating	eHealth Exchange Not Participating	SSA Authorizations	SSA Revocations																																										
ALASKA VA HLTCR SYSTEM AVAHS	7	8	0	0																																										
Albany VA Medical Center	1	7	6	0																																										
ASHEVILLE VAMC	0	0	93	0																																										
ATLANTA VAMC	1	1	0	0																																										
BATTLE CREEK VA MEDICAL CENTER	0	1	0	0																																										
BOISE VAMROC	1	0	0	0																																										
BRANSON CBOC	0	0	2	0																																										
CHYSHR	6	6	6	0																																										


4.10.3 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.	<p>From the Reports menu, select Patient Opt-Out Summary Report (Figure 59).</p> <p style="text-align: center;">Figure 59: Summary Reports Menu—Selecting Patient Opt-Out Summary Report</p>  <p>The screenshot shows the VA VHIE Portal interface. At the top, there is a dark blue header with the VA logo, 'VHIE PORTAL', and navigation links for 'Patient Search', 'Reports', and 'Admin'. The 'Reports' dropdown menu is open, displaying a list of options: 'Consent Activity Dashboard', 'User Activity Dashboard', 'Summary Reports', and 'Detailed Reports'. The 'Summary Reports' option is highlighted in light blue. A secondary dropdown menu is visible to the right of 'Summary Reports', listing 'Consent Directive Summary Report' and 'Patient Opt-Out Summary Report'. A red arrow points to the 'Patient Opt-Out Summary Report' option. On the left side of the page, there is a 'Patient Search' section with input fields for 'Social Security Number', 'First Name', and 'Last Name', and a 'SEARCH' button.</p>

Step	Action
2.	<p>Complete the appropriate search criteria, and then select Search (Figure 60).</p> <p style="text-align: center;">Figure 60: Patient Opt-Out Summary Report—Selecting Search Criteria</p> <div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: 80%;"> <p style="text-align: center;">Patient Opt-Out Report - Summary</p> <p>Authenticating Facilities</p> <div style="display: flex; align-items: flex-start;"> <div style="border: 1px solid gray; padding: 5px; width: 80%; min-height: 80px;">All</div> <div style="border: 1px solid gray; padding: 5px; margin-left: 10px; width: 60px; text-align: center;">Select...</div> </div> <p>Consent Type</p> <div style="border: 1px solid gray; padding: 5px; width: 100%;">All ▼</div> <p>Patient Type</p> <div style="border: 1px solid gray; padding: 5px; width: 100%;">Real Patients ▼</div> <p>User Id</p> <div style="border: 1px solid gray; padding: 5px; width: 100%; height: 20px;"></div> <p>Selection Date</p> <p> <input checked="" type="radio"/> Entry Date <input type="radio"/> Signature Date </p> <p>Start Date (Required) End Date</p> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid gray; padding: 5px; width: 45%;">2019/07/15 <small>YYYYMMDD</small></div> <div style="border: 1px solid gray; padding: 5px; width: 45%;">2019/08/14 <small>YYYYMMDD</small></div> </div> <p style="text-align: center; margin-top: 10px;">SEARCH ←</p> </div>

Step	Action																																												
3.	<p>In the returned results, the user can export the report to a .CSV file by selecting Export CSV (Figure 61).</p> <p style="text-align: center;">Figure 61: Sample Patient Opt-Out Summary Report—Exporting to a CSV File</p>  <table border="1" data-bbox="321 426 1562 865"> <thead> <tr> <th>Facility Name</th> <th>eHealth Exchange Not Participating</th> <th>SSA Revocations</th> <th>Facility Total Count</th> </tr> </thead> <tbody> <tr> <td>ALASKA VA HLTCR SYSTEM AVAHS</td> <td>20</td> <td>0</td> <td>20</td> </tr> <tr> <td>ALEXANDRIA VAMC</td> <td>1</td> <td>0</td> <td>1</td> </tr> <tr> <td>AMARILLO HCS</td> <td>1</td> <td>0</td> <td>1</td> </tr> <tr> <td>ANN ARBOR VAMC</td> <td>1</td> <td>0</td> <td>1</td> </tr> <tr> <td>ASHEVILLE VAMC</td> <td>1</td> <td>78</td> <td>79</td> </tr> <tr> <td>ATLANTA VAMC</td> <td>5</td> <td>0</td> <td>5</td> </tr> <tr> <td>Albany VA Medical Center</td> <td>17</td> <td>4</td> <td>21</td> </tr> <tr> <td>American Lake VA Medical Center</td> <td>1</td> <td>0</td> <td>1</td> </tr> <tr> <td>BATTLE CREEK VA MEDICAL CENTER</td> <td>2</td> <td>0</td> <td>2</td> </tr> <tr> <td>BLACK HILLS HEALTH CARE SYSTEM - FT. MEADE DIVISION</td> <td>1</td> <td>0</td> <td>1</td> </tr> </tbody> </table>	Facility Name	eHealth Exchange Not Participating	SSA Revocations	Facility Total Count	ALASKA VA HLTCR SYSTEM AVAHS	20	0	20	ALEXANDRIA VAMC	1	0	1	AMARILLO HCS	1	0	1	ANN ARBOR VAMC	1	0	1	ASHEVILLE VAMC	1	78	79	ATLANTA VAMC	5	0	5	Albany VA Medical Center	17	4	21	American Lake VA Medical Center	1	0	1	BATTLE CREEK VA MEDICAL CENTER	2	0	2	BLACK HILLS HEALTH CARE SYSTEM - FT. MEADE DIVISION	1	0	1
Facility Name	eHealth Exchange Not Participating	SSA Revocations	Facility Total Count																																										
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BATTLE CREEK VA MEDICAL CENTER	2	0	2																																										
BLACK HILLS HEALTH CARE SYSTEM - FT. MEADE DIVISION	1	0	1																																										

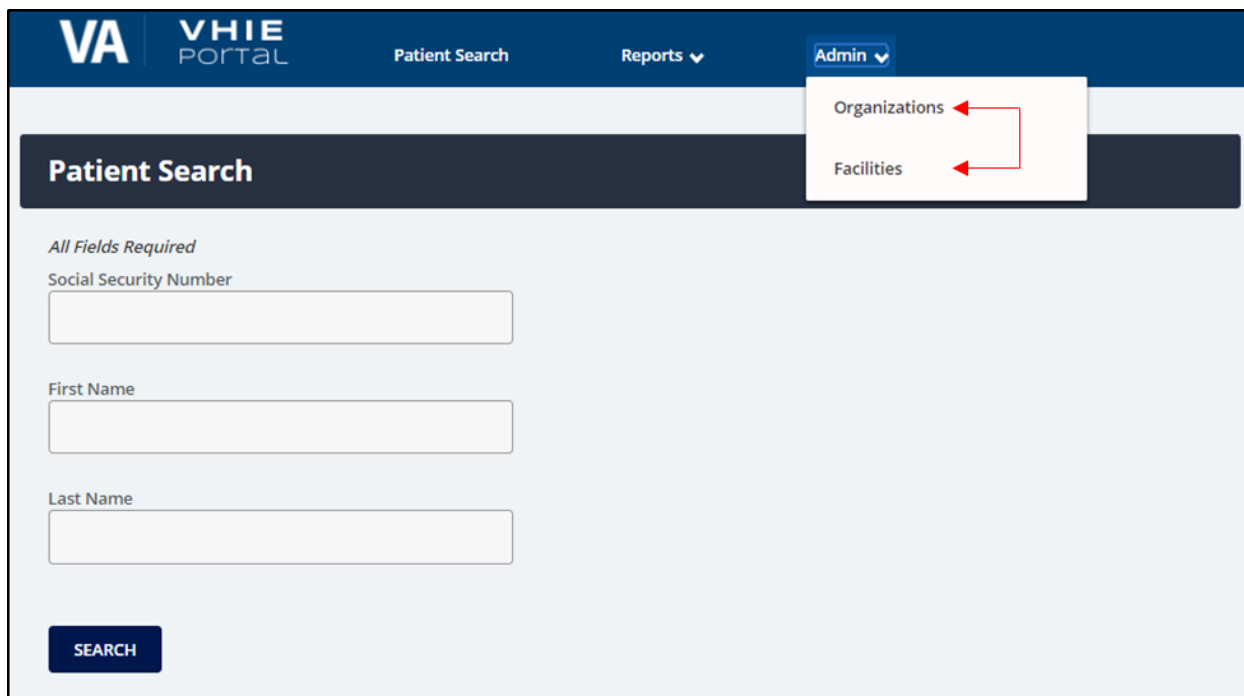
4.11 Admin Menu—Partner Organizations and Facilities List

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

4.11.1 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



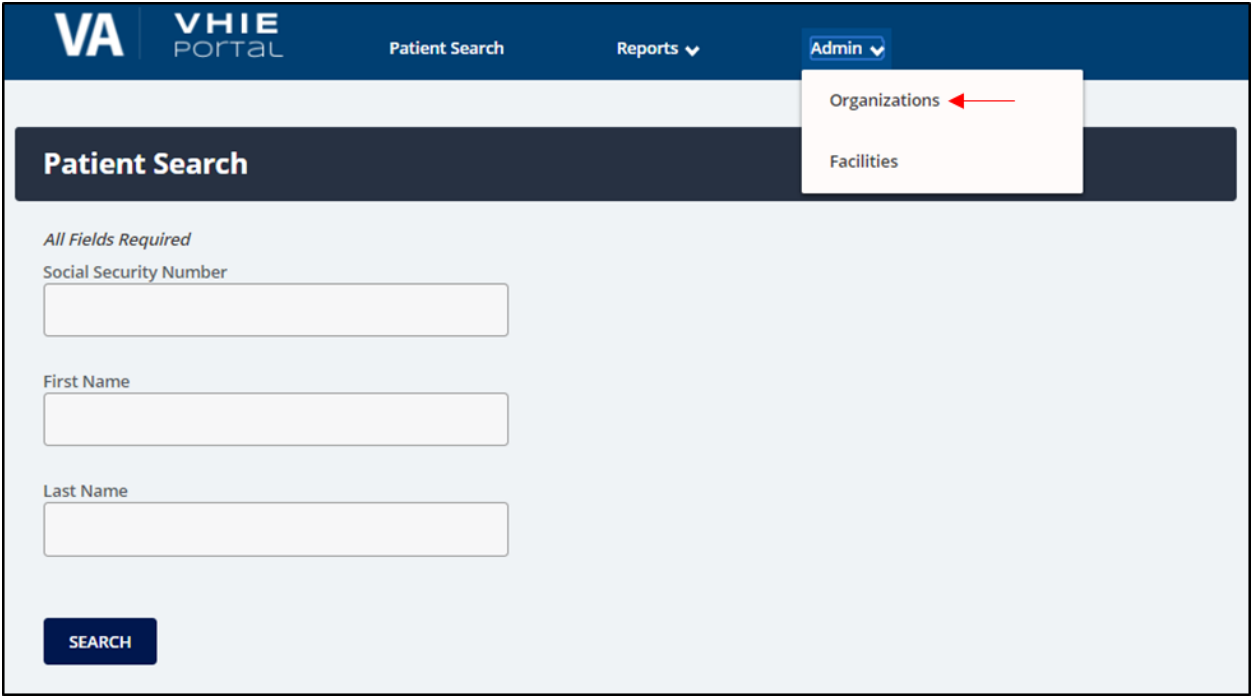
4.11.2 Access or Modify Partner Organizations List

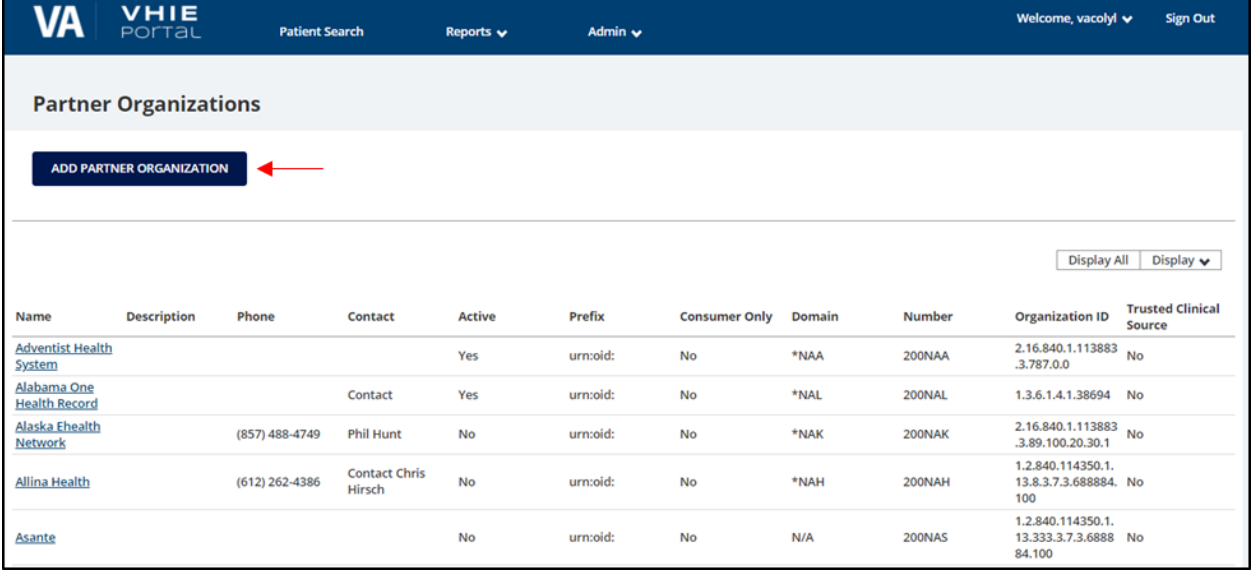
The VHIE admin user can access the list of Partner Organizations to view, edit, delete, or add new organizations.


4.11.2.1 Prerequisite

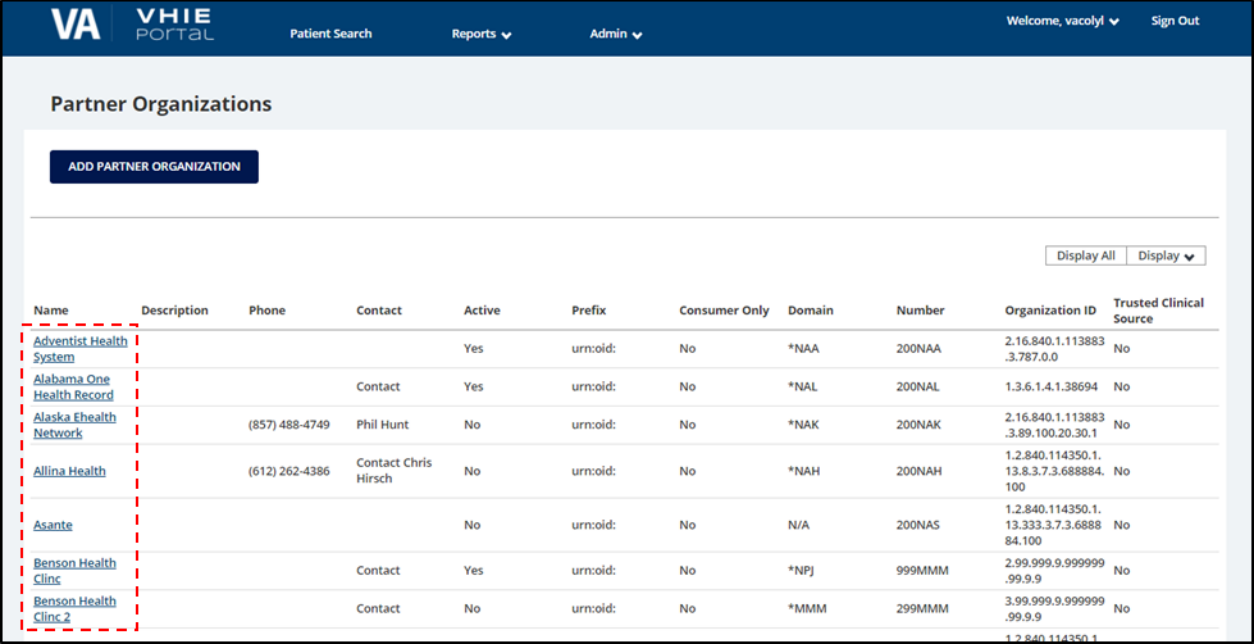
- The user has logged in via SSOi or another VA-approved method for authentication.
- The user is provided with elevated admin privileges to access and modify the list of Partner Organizations.

Table 15: Access or Modify Partner Organizations List

Step	Action
1.	<p>From the Admin menu, select Organizations (Figure 63).</p> <p style="text-align: center;">Figure 63: Admin Menu—Selecting Organizations</p>  <p>The screenshot shows the VA VHIe Portal interface. At the top, there is a dark blue navigation bar with the VA logo, 'VHIe PORTAL', and menu items for 'Patient Search', 'Reports', and 'Admin'. The 'Admin' menu is open, showing a dropdown list with 'Organizations' and 'Facilities'. A red arrow points to the 'Organizations' option. Below the navigation bar, there is a 'Patient Search' section with a form containing three input fields: 'Social Security Number', 'First Name', and 'Last Name', each with a 'SEARCH' button below it.</p>

Step	Action																																																																		
2.	<p>To add a new Partner Organization, select Add Partner Organization (Figure 64).</p> <p style="text-align: center;">Figure 64: Partner Organizations—Adding a New Partner Organization</p>  <table border="1" data-bbox="321 688 1565 961"> <thead> <tr> <th>Name</th> <th>Description</th> <th>Phone</th> <th>Contact</th> <th>Active</th> <th>Prefix</th> <th>Consumer Only</th> <th>Domain</th> <th>Number</th> <th>Organization ID</th> <th>Trusted Clinical Source</th> </tr> </thead> <tbody> <tr> <td>Adventist Health System</td> <td></td> <td></td> <td></td> <td>Yes</td> <td>urn:oid:</td> <td>No</td> <td>*NAA</td> <td>200NAA</td> <td>2.16.840.1.113883.3.787.0.0</td> <td>No</td> </tr> <tr> <td>Alabama One Health Record</td> <td></td> <td></td> <td>Contact</td> <td>Yes</td> <td>urn:oid:</td> <td>No</td> <td>*NAL</td> <td>200NAL</td> <td>1.3.6.1.4.1.38694</td> <td>No</td> </tr> <tr> <td>Alaska Ehealth Network</td> <td></td> <td>(857) 488-4749</td> <td>Phil Hunt</td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>*NAK</td> <td>200NAK</td> <td>2.16.840.1.113883.3.89.100.20.30.1</td> <td>No</td> </tr> <tr> <td>Allina Health</td> <td></td> <td>(612) 262-4386</td> <td>Contact Chris Hirsch</td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>*NAH</td> <td>200NAH</td> <td>1.2.840.114350.1.13.8.3.7.3.68884.100</td> <td>No</td> </tr> <tr> <td>Asante</td> <td></td> <td></td> <td></td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>N/A</td> <td>200NAS</td> <td>1.2.840.114350.1.13.333.3.7.3.6888.84.100</td> <td>No</td> </tr> </tbody> </table>	Name	Description	Phone	Contact	Active	Prefix	Consumer Only	Domain	Number	Organization ID	Trusted Clinical Source	Adventist Health System				Yes	urn:oid:	No	*NAA	200NAA	2.16.840.1.113883.3.787.0.0	No	Alabama One Health Record			Contact	Yes	urn:oid:	No	*NAL	200NAL	1.3.6.1.4.1.38694	No	Alaska Ehealth Network		(857) 488-4749	Phil Hunt	No	urn:oid:	No	*NAK	200NAK	2.16.840.1.113883.3.89.100.20.30.1	No	Allina Health		(612) 262-4386	Contact Chris Hirsch	No	urn:oid:	No	*NAH	200NAH	1.2.840.114350.1.13.8.3.7.3.68884.100	No	Asante				No	urn:oid:	No	N/A	200NAS	1.2.840.114350.1.13.333.3.7.3.6888.84.100	No
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Step	Action
3.	<p>Complete the appropriate required fields, and then select Save to add the new Partner Organization (Figure 65).</p> <p style="text-align: center;">Figure 65: Add Partner Organization—Entering Required Fields and Saving New Partner Organization</p> <div data-bbox="634 453 1252 1415" style="border: 1px solid black; padding: 10px;"> <p>Partner Organizations</p> <p>Add Partner Organization</p> <p><i>Required Fields</i></p> <p>Organization Name (Required) <input type="text"/></p> <p>Organization Description (Required) <input type="text"/></p> <p>Organization Number (Required) <input type="text"/></p> <p>Organization ID (Required) <input type="text"/></p> <p><i>Optional Fields</i></p> <p>Contact Name <input type="text"/></p> <p>Contact Telephone <input type="text"/></p> <p>Domain <input type="text"/></p> <p>Prefix <input type="text"/></p> <p><input type="checkbox"/> Is Trusted Clinical Source <input type="checkbox"/> Is Active <input type="checkbox"/> Is Consumer Only</p> <p>SAVE CANCEL</p>  </div>

Step	Action																																																																																								
4.	<p>To edit or delete an existing Partner Organization, select the targeted organization name (Figure 66).</p> <p style="text-align: center;">Figure 66: Partner Organizations—Selecting an Existing Partner Organization</p>  <p>The screenshot displays the 'Partner Organizations' section of the VA VHI Portal. At the top, there is a navigation bar with the VA logo, 'VHI PORTAL', and links for Patient Search, Reports, and Admin. Below the navigation bar, the page title 'Partner Organizations' is shown, followed by an 'ADD PARTNER ORGANIZATION' button. A table lists various partner organizations. The first two rows, 'Adventist Health System' and 'Alabama One Health Record', are highlighted with a red dashed box. The table columns include Name, Description, Phone, Contact, Active, Prefix, Consumer Only, Domain, Number, Organization ID, and Trusted Clinical Source.</p> <table border="1" data-bbox="342 716 1539 1066"> <thead> <tr> <th>Name</th> <th>Description</th> <th>Phone</th> <th>Contact</th> <th>Active</th> <th>Prefix</th> <th>Consumer Only</th> <th>Domain</th> <th>Number</th> <th>Organization ID</th> <th>Trusted Clinical Source</th> </tr> </thead> <tbody> <tr> <td>Adventist Health System</td> <td></td> <td></td> <td></td> <td>Yes</td> <td>urn:oid:</td> <td>No</td> <td>*NAA</td> <td>200NAA</td> <td>2.16.840.1.113883.3.787.0.0</td> <td>No</td> </tr> <tr> <td>Alabama One Health Record</td> <td></td> <td></td> <td>Contact</td> <td>Yes</td> <td>urn:oid:</td> <td>No</td> <td>*NAL</td> <td>200NAL</td> <td>1.3.6.1.4.1.38694</td> <td>No</td> </tr> <tr> <td>Alaska Ehealth Network</td> <td></td> <td>(857) 488-4749</td> <td>Phil Hunt</td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>*NAK</td> <td>200NAK</td> <td>2.16.840.1.113883.3.89.100.20.30.1</td> <td>No</td> </tr> <tr> <td>Allina Health</td> <td></td> <td>(612) 262-4386</td> <td>Contact Chris Hirsch</td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>*NAH</td> <td>200NAH</td> <td>1.2.840.114350.1.13.8.3.7.3.688884.100</td> <td>No</td> </tr> <tr> <td>Asante</td> <td></td> <td></td> <td></td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>N/A</td> <td>200NAS</td> <td>1.2.840.114350.1.13.333.3.7.3.688884.100</td> <td>No</td> </tr> <tr> <td>Benson Health Clinic</td> <td></td> <td></td> <td>Contact</td> <td>Yes</td> <td>urn:oid:</td> <td>No</td> <td>*NPJ</td> <td>999MMM</td> <td>2.99.999.9.999999.99.9.9</td> <td>No</td> </tr> <tr> <td>Benson Health Clinic 2</td> <td></td> <td></td> <td>Contact</td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>*MMM</td> <td>299MMM</td> <td>3.99.999.9.999999.99.9.9</td> <td>No</td> </tr> </tbody> </table>	Name	Description	Phone	Contact	Active	Prefix	Consumer Only	Domain	Number	Organization ID	Trusted Clinical Source	Adventist Health System				Yes	urn:oid:	No	*NAA	200NAA	2.16.840.1.113883.3.787.0.0	No	Alabama One Health Record			Contact	Yes	urn:oid:	No	*NAL	200NAL	1.3.6.1.4.1.38694	No	Alaska Ehealth Network		(857) 488-4749	Phil Hunt	No	urn:oid:	No	*NAK	200NAK	2.16.840.1.113883.3.89.100.20.30.1	No	Allina Health		(612) 262-4386	Contact Chris Hirsch	No	urn:oid:	No	*NAH	200NAH	1.2.840.114350.1.13.8.3.7.3.688884.100	No	Asante				No	urn:oid:	No	N/A	200NAS	1.2.840.114350.1.13.333.3.7.3.688884.100	No	Benson Health Clinic			Contact	Yes	urn:oid:	No	*NPJ	999MMM	2.99.999.9.999999.99.9.9	No	Benson Health Clinic 2			Contact	No	urn:oid:	No	*MMM	299MMM	3.99.999.9.999999.99.9.9	No
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Benson Health Clinic 2			Contact	No	urn:oid:	No	*MMM	299MMM	3.99.999.9.999999.99.9.9	No																																																																															

Step	Action
5.	<p data-bbox="321 254 1484 321">Complete the appropriate required fields and select Save to edit the organization or select Delete to remove the organization from the list (Figure 67).</p> <p data-bbox="329 380 1560 447">Figure 67: Edit Partner Organizations—Editing Required Fields and Saving Changes or Deleting a Partner Organization</p> <div data-bbox="321 457 1565 1373" style="border: 1px solid black; padding: 10px;"> <p data-bbox="370 468 703 499">Partner Organizations</p> <p data-bbox="370 552 708 583">Edit Partner Organization</p> <p data-bbox="370 604 505 632"><i>Required Fields</i></p> <p data-bbox="370 638 630 665">Organization Name (Required) <input data-bbox="375 665 1138 709" type="text" value="Adventist Health System"/></p> <p data-bbox="370 735 675 762">Organization Description (Required) <input data-bbox="375 762 1138 806" type="text"/></p> <p data-bbox="370 831 649 858">Organization Number (Required) <input data-bbox="375 858 1138 903" type="text" value="200NAA"/></p> <p data-bbox="370 926 505 953"><i>Optional Fields</i></p> <p data-bbox="370 959 493 987">Contact Name <input data-bbox="375 987 1138 1031" type="text"/></p> <p data-bbox="370 1056 532 1083">Contact Telephone <input data-bbox="375 1083 1138 1127" type="text"/></p> <p data-bbox="370 1173 621 1201"><input type="checkbox"/> Is Trusted Clinical Source</p> <p data-bbox="370 1247 467 1283">SAVE</p> <p data-bbox="500 1247 618 1283">DELETE</p> <p data-bbox="675 1247 743 1274"><u>CANCEL</u></p> <p data-bbox="1256 604 1406 632"><i>Information Only</i></p> <p data-bbox="1256 638 1321 665">Active</p> <p data-bbox="1256 672 1295 699">Yes</p> <p data-bbox="1256 705 1401 732">Consumer Only</p> <p data-bbox="1256 739 1295 766">No</p> <p data-bbox="1256 772 1401 800">Organization ID</p> <p data-bbox="1256 806 1495 833">2.16.840.1.113883.3.787.0.0</p> <p data-bbox="1256 840 1336 867">Domain</p> <p data-bbox="1256 873 1312 900">*NAA</p> <p data-bbox="1256 907 1317 934">Prefix</p> <p data-bbox="1256 940 1333 968">urn:oid:</p> </div> <p data-bbox="412 1289 428 1352">↑</p> <p data-bbox="558 1289 574 1352">↑</p>

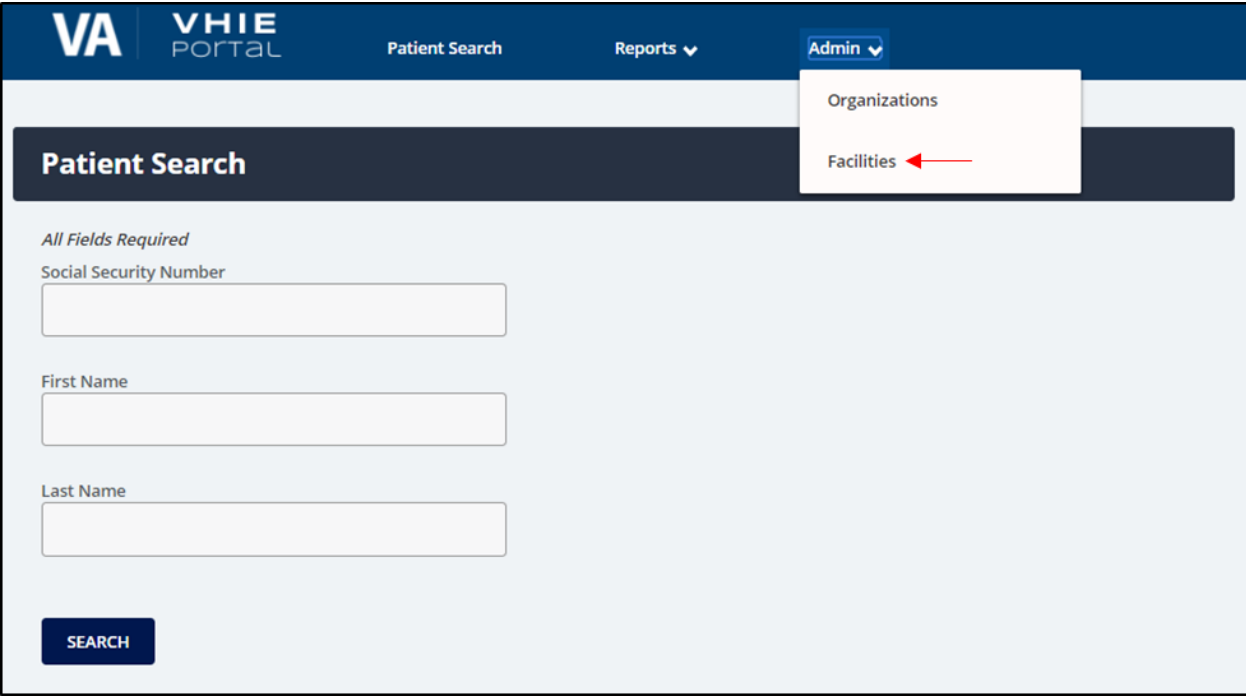
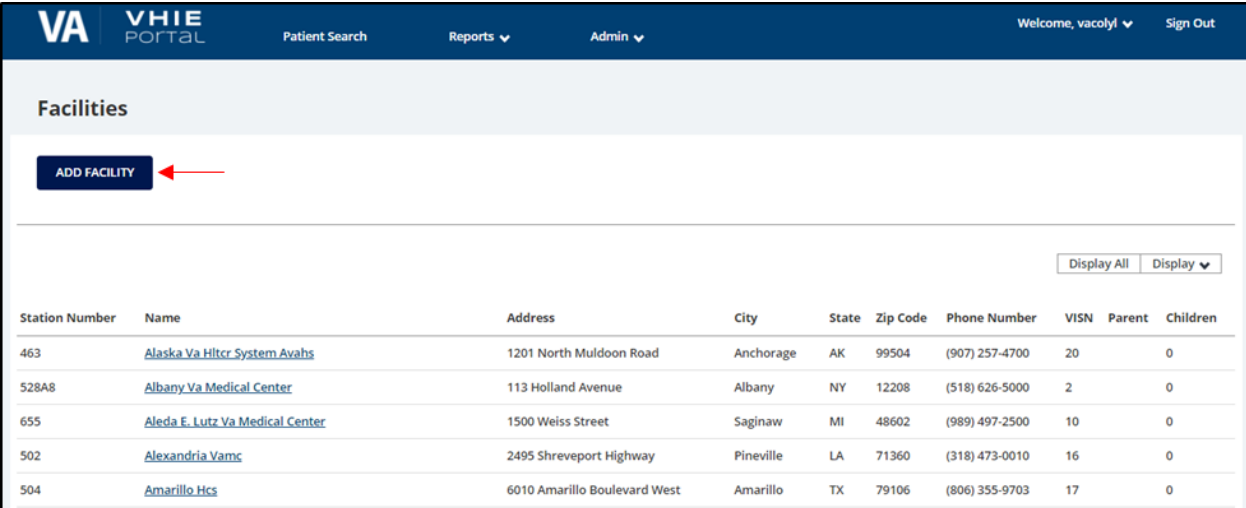
4.11.3 Access or Modify Facilities List

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

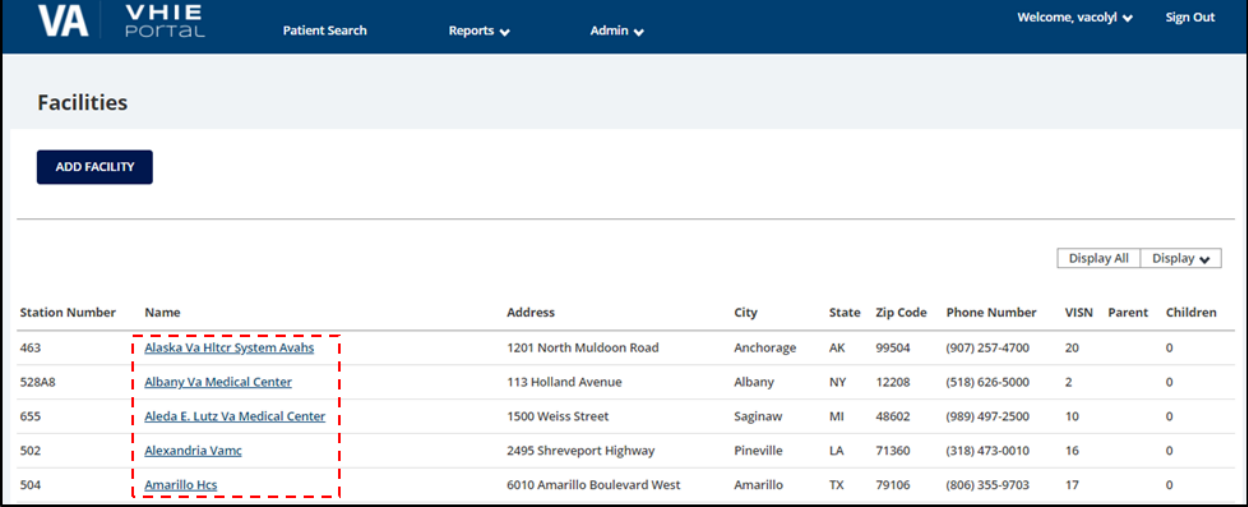
4.11.3.1 Prerequisite

- 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.	<p>From the Admin menu, select Facilities (Figure 68).</p> <p style="text-align: center;">Figure 68: Admin Menu—Selecting Facilities</p>  <p>The screenshot shows the VA VHI Portal interface. At the top, there is a navigation bar with the VA logo, 'VHIE PORTAL', and links for 'Patient Search', 'Reports', and 'Admin'. The 'Admin' dropdown menu is open, showing 'Organizations' and 'Facilities'. A red arrow points to 'Facilities'. Below the navigation bar, there is a 'Patient Search' section with a search form containing fields for 'Social Security Number', 'First Name', and 'Last Name', and a 'SEARCH' button.</p>																																																												
2.	<p>To add a new VA Facility, select Add Facility (Figure 69).</p> <p style="text-align: center;">Figure 69: Facilities—Adding a New Facility</p>  <p>The screenshot shows the VA VHI Portal interface. At the top, there is a navigation bar with the VA logo, 'VHIE PORTAL', and links for 'Patient Search', 'Reports', and 'Admin'. The 'Admin' dropdown menu is open, showing 'Organizations' and 'Facilities'. A red arrow points to 'Facilities'. Below the navigation bar, there is a 'Facilities' section with a table of facilities. The 'ADD FACILITY' button is highlighted with a red arrow.</p> <table border="1" data-bbox="337 1617 1544 1816"> <thead> <tr> <th>Station Number</th> <th>Name</th> <th>Address</th> <th>City</th> <th>State</th> <th>Zip Code</th> <th>Phone Number</th> <th>VISN</th> <th>Parent</th> <th>Children</th> </tr> </thead> <tbody> <tr> <td>463</td> <td>Alaska Va Hltcr System Avahs</td> <td>1201 North Muldoon Road</td> <td>Anchorage</td> <td>AK</td> <td>99504</td> <td>(907) 257-4700</td> <td>20</td> <td>0</td> <td></td> </tr> <tr> <td>528A8</td> <td>Albany Va Medical Center</td> <td>113 Holland Avenue</td> <td>Albany</td> <td>NY</td> <td>12208</td> <td>(518) 626-5000</td> <td>2</td> <td>0</td> <td></td> </tr> <tr> <td>655</td> <td>Aleda E. Lutz Va Medical Center</td> <td>1500 Weiss Street</td> <td>Saginaw</td> <td>MI</td> <td>48602</td> <td>(989) 497-2500</td> <td>10</td> <td>0</td> <td></td> </tr> <tr> <td>502</td> <td>Alexandria Vamc</td> <td>2495 Shreveport Highway</td> <td>Pineville</td> <td>LA</td> <td>71360</td> <td>(318) 473-0010</td> <td>16</td> <td>0</td> <td></td> </tr> <tr> <td>504</td> <td>Amarillo Hcs</td> <td>6010 Amarillo Boulevard West</td> <td>Amarillo</td> <td>TX</td> <td>79106</td> <td>(806) 355-9703</td> <td>17</td> <td>0</td> <td></td> </tr> </tbody> </table>	Station Number	Name	Address	City	State	Zip Code	Phone Number	VISN	Parent	Children	463	Alaska Va Hltcr System Avahs	1201 North Muldoon Road	Anchorage	AK	99504	(907) 257-4700	20	0		528A8	Albany Va Medical Center	113 Holland Avenue	Albany	NY	12208	(518) 626-5000	2	0		655	Aleda E. Lutz Va Medical Center	1500 Weiss Street	Saginaw	MI	48602	(989) 497-2500	10	0		502	Alexandria Vamc	2495 Shreveport Highway	Pineville	LA	71360	(318) 473-0010	16	0		504	Amarillo Hcs	6010 Amarillo Boulevard West	Amarillo	TX	79106	(806) 355-9703	17	0	
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Step	Action
3.	<p>Complete the appropriate required fields, then select Save to add the new VA Facility (Figure 70).</p> <p style="text-align: center;">Figure 70: Add Facility—Entering Required Fields and Saving New VA Facility</p> <div data-bbox="581 422 1295 1377" style="border: 1px solid black; padding: 10px;"> <p>Add Facility</p> <p><i>Required Fields</i></p> <p>Station Number <input type="text"/></p> <p>Facility Name <input type="text"/></p> <p>VISN <input type="text" value="VISN 3 - VA NY/NJ Veterans Healthcare Network"/></p> <p><i>Optional Fields</i></p> <p>Facility DNS <input type="text"/></p> <p>Address <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/></p> <p>Zip Code <input type="text"/></p> <p>Phone Number <input type="text"/></p> <p>Parent <input type="text"/></p> <p style="text-align: center;"> <input type="button" value="SAVE"/> <input type="button" value="CANCEL"/> </p> <p style="text-align: center;">↑</p> </div>

Step	Action																																																							
4.	<p>To edit or delete an existing VA Facility, select the targeted facility name (Figure 71).</p> <p style="text-align: center;">Figure 71: Facilities—Selecting an Existing Facility</p>  <p>The screenshot shows the 'Facilities' page in the VA VHIE Portal. At the top, there is a navigation bar with the VA logo, 'VHIE PORTAL', and links for 'Patient Search', 'Reports', and 'Admin'. A user is logged in as 'Welcome, vacolyl' with a 'Sign Out' link. Below the navigation bar, there is a section titled 'Facilities' with an 'ADD FACILITY' button. A table of facilities is displayed, with columns for Station Number, Name, Address, City, State, Zip Code, Phone Number, VISN, Parent, and Children. The 'Name' column is highlighted with a red dashed box, and the first five rows of the table are visible.</p> <table border="1" data-bbox="332 695 1550 898"> <thead> <tr> <th>Station Number</th> <th>Name</th> <th>Address</th> <th>City</th> <th>State</th> <th>Zip Code</th> <th>Phone Number</th> <th>VISN</th> <th>Parent</th> <th>Children</th> </tr> </thead> <tbody> <tr> <td>463</td> <td>Alaska Va Hltcr System Avahs</td> <td>1201 North Muldoon Road</td> <td>Anchorage</td> <td>AK</td> <td>99504</td> <td>(907) 257-4700</td> <td>20</td> <td>0</td> </tr> <tr> <td>528A8</td> <td>Albany Va Medical Center</td> <td>113 Holland Avenue</td> <td>Albany</td> <td>NY</td> <td>12208</td> <td>(518) 626-5000</td> <td>2</td> <td>0</td> </tr> <tr> <td>655</td> <td>Aleda E. Lutz Va Medical Center</td> <td>1500 Weiss Street</td> <td>Saginaw</td> <td>MI</td> <td>48602</td> <td>(989) 497-2500</td> <td>10</td> <td>0</td> </tr> <tr> <td>502</td> <td>Alexandria Vamc</td> <td>2495 Shreveport Highway</td> <td>Pineville</td> <td>LA</td> <td>71360</td> <td>(318) 473-0010</td> <td>16</td> <td>0</td> </tr> <tr> <td>504</td> <td>Amarillo Hcs</td> <td>6010 Amarillo Boulevard West</td> <td>Amarillo</td> <td>TX</td> <td>79106</td> <td>(806) 355-9703</td> <td>17</td> <td>0</td> </tr> </tbody> </table>	Station Number	Name	Address	City	State	Zip Code	Phone Number	VISN	Parent	Children	463	Alaska Va Hltcr System Avahs	1201 North Muldoon Road	Anchorage	AK	99504	(907) 257-4700	20	0	528A8	Albany Va Medical Center	113 Holland Avenue	Albany	NY	12208	(518) 626-5000	2	0	655	Aleda E. Lutz Va Medical Center	1500 Weiss Street	Saginaw	MI	48602	(989) 497-2500	10	0	502	Alexandria Vamc	2495 Shreveport Highway	Pineville	LA	71360	(318) 473-0010	16	0	504	Amarillo Hcs	6010 Amarillo Boulevard West	Amarillo	TX	79106	(806) 355-9703	17	0
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Step	Action
5.	<p data-bbox="321 256 1534 319">Complete the appropriate required fields and select Save to edit the facility or select Delete to remove the facility from the list (Figure 72).</p> <p data-bbox="370 382 1513 415">Figure 72: Edit Facility—Editing Required Fields and Saving Changes or Deleting a Facility</p> <div data-bbox="604 424 1274 1381" style="border: 1px solid black; padding: 10px;"> <p data-bbox="620 430 722 457">Facilities</p> <p data-bbox="620 493 738 520">Edit Facility</p> <p data-bbox="620 535 722 556"><i>Required Fields</i></p> <p data-bbox="620 562 803 583">Station Number (Cannot Edit)</p> <p data-bbox="620 583 1258 613">463</p> <p data-bbox="620 630 706 651">Facility Name</p> <p data-bbox="620 651 1258 680">ALASKA VA HLTCR SYSTEM AVAHS</p> <p data-bbox="620 697 657 718">VISN</p> <p data-bbox="620 718 1258 747">VISN 20 - Northwest Network</p> <p data-bbox="620 764 722 785"><i>Optional Fields</i></p> <p data-bbox="620 791 698 812">Facility DNS</p> <p data-bbox="620 812 1258 842">ANCHORAGE.MED.VA.GOV</p> <p data-bbox="620 858 673 879">Address</p> <p data-bbox="620 879 1258 909">1201 North Muldoon Road</p> <p data-bbox="620 926 649 947">City</p> <p data-bbox="620 947 1258 976">Anchorage</p> <p data-bbox="620 993 657 1014">State</p> <p data-bbox="620 1014 1258 1043">AK</p> <p data-bbox="620 1060 673 1081">Zip Code</p> <p data-bbox="620 1081 1258 1110">99504</p> <p data-bbox="620 1127 722 1148">Phone Number</p> <p data-bbox="620 1148 1258 1178">(907) 257-4700</p> <p data-bbox="620 1194 665 1215">Parent</p> <p data-bbox="620 1215 1258 1245"></p> <p data-bbox="620 1304 690 1333">SAVE</p> <p data-bbox="714 1304 803 1333">DELETE</p> <p data-bbox="836 1304 901 1333">CANCEL</p> </div>

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

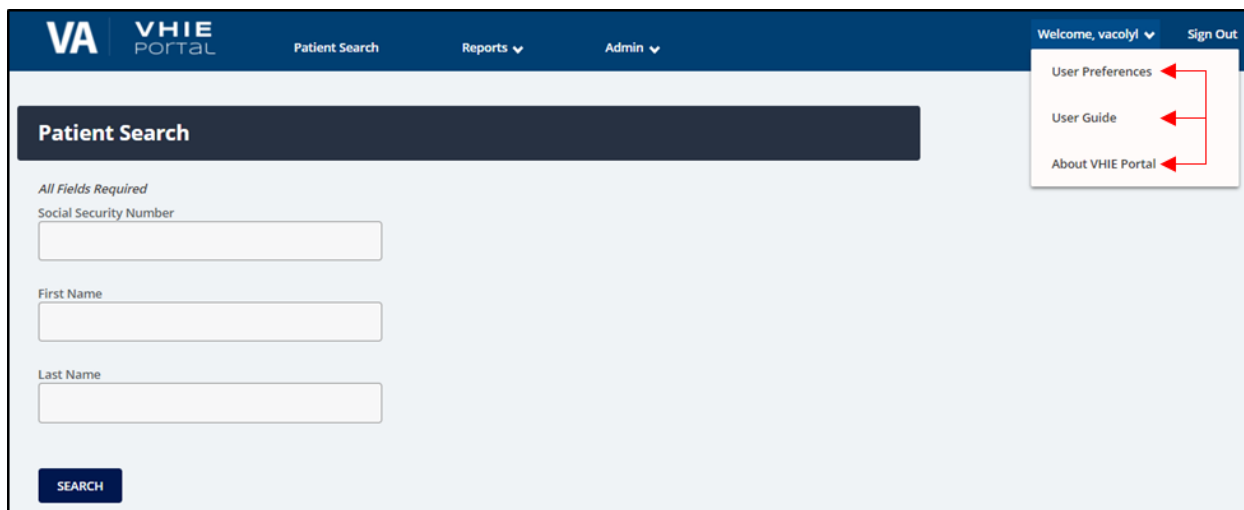
From within the VHIE Portal, a VHIE user can select the displayed username at the top of the web page ([Figure 73](#)) to select the **Welcome** menu items:

- **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.

4.12.1 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




4.12.2 Set or Update User's Default Facility

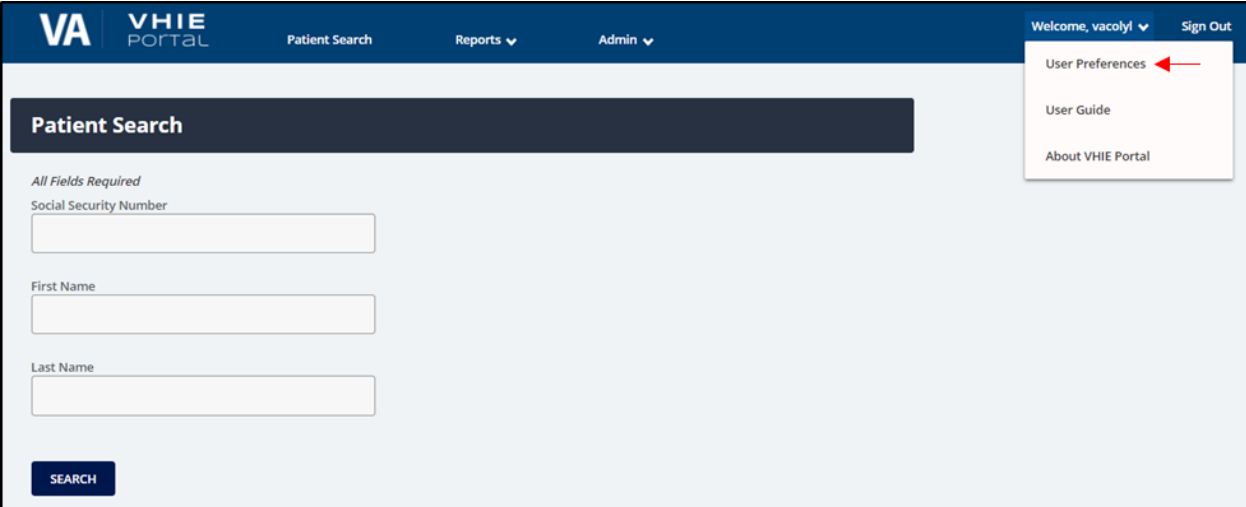
The VHIE user can set or remove their default facility from the notification message at the “VHIE Portal” Landing Page or by selecting **User Preferences** from the **Welcome** menu, under the username.


4.12.3 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.	<p>If the VHIE user has <i>not</i> set a default facility, a notification message displays at the “VHIE Portal” Landing Page after login (Figure 74).</p> <p>i NOTE: The notification message will continue to display at the “VHIE Portal” Landing Page until the VHIE user has set a default facility.</p> <p>Figure 74: VHIE Portal—Landing Page: Notification Message to Set Default Facility</p>  <p>The screenshot shows the VHIE Portal landing page. At the top, there is a navigation bar with the VA logo, 'VHIE PORTAL', and links for 'Patient Search', 'Reports', and 'Admin'. On the right, it says 'Welcome, vacoly!' and 'Sign Out'. A notification message is displayed in the top right corner, stating 'You do not have a default facility set. Would you like to set one now?' with 'Yes' and 'Not Now' buttons. A red arrow points to this message. On the left, there is a 'Quick Links' section with links for 'Patient Search', 'User Preferences', 'Consent Activity Dashboard', and 'User Activity Dashboard'. The main content area features a large image of several flags being held by people in uniform. At the bottom, there is a footer with the VA logo, 'U.S. Department of Veterans Affairs', and various links including 'About VA', 'Accessibility', 'Disclaimer', 'Employee Resources', 'Find a Facility', 'Intranet Privacy Policy', 'NCA Intranet Home', 'No Fear Act', 'Organizations', and 'Terms of Use'.</p>

Step	Action
2.	<p>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).</p> <p style="text-align: center;">Figure 75: Welcome Menu—Selecting User Preferences</p> 

Step	Action
3.	<p>Select the VA Facility from the drop-down list to use as the default facility, then select Set Default Facility (Figure 76).</p> <p style="text-align: center;">Figure 76: Default Facility—Setting Default Facility</p> <div style="border: 1px solid black; padding: 10px;"> <h3 style="margin: 0;">Default Facility</h3> <p style="margin: 10px 0;">You do not currently have a default facility. To set a default facility, choose one from the drop down list and select "Set Default Facility."</p> <p style="margin: 10px 0;">VA Facility</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;">All ▼</div> <div style="display: flex; justify-content: space-around; margin-top: 20px;"> <div style="background-color: #003366; color: white; padding: 10px 20px; border-radius: 5px;">SET DEFAULT FACILITY</div> <div style="border: 1px solid #003366; padding: 10px 20px; border-radius: 5px;">REMOVE DEFAULT FACILITY</div> </div>  </div>

Step	Action
4.	<p>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).</p> <p style="text-align: center;">Figure 77: Default Facility—Removing Default Facility</p> <div style="border: 1px solid black; padding: 10px;"> <h3 style="background-color: #e0e0e0; margin: 0; padding: 5px;">Default Facility</h3> <div style="border: 1px solid #ccc; border-radius: 10px; padding: 10px; margin: 10px 0;"> <p>Your default facility is manually set to SPOKANE VAMC(668). To change your default setting, choose a facility from the drop down list and select "Set Default Facility." To remove your default setting and revert to the automatic system setting, select "Remove Default Facility."</p> </div> <p>VA Facility</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> SPOKANE VAMC ▼ </div> <div style="display: flex; justify-content: space-around; margin-top: 20px;"> <div style="background-color: #003366; color: white; padding: 10px 20px; border-radius: 5px;">SET DEFAULT FACILITY</div> <div style="border: 1px solid #003366; padding: 10px 20px; border-radius: 5px; display: flex; align-items: center; justify-content: center;"> REMOVE DEFAULT FACILITY  </div> </div> </div>

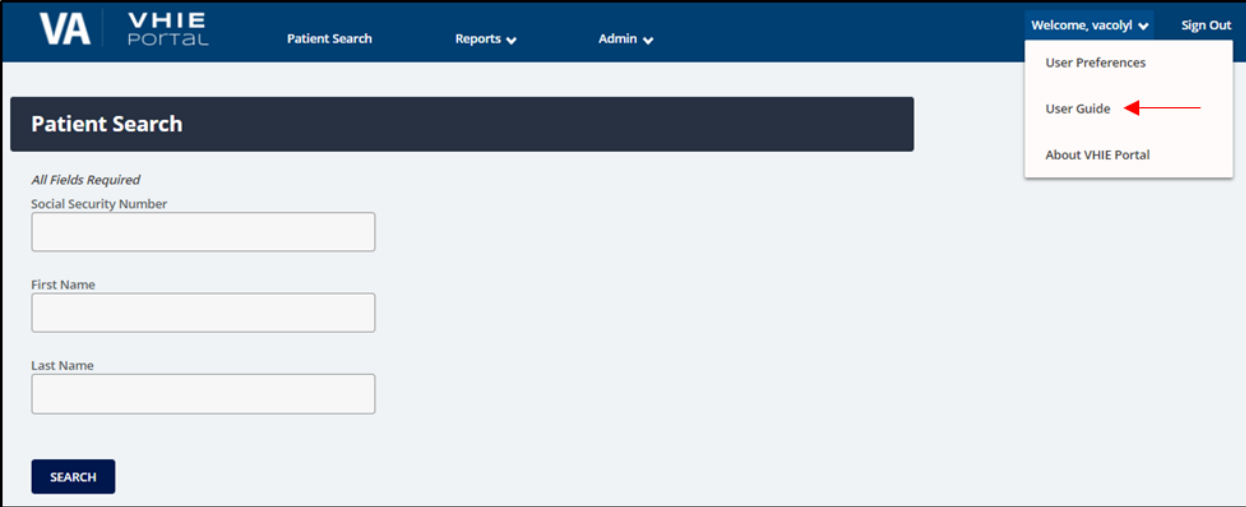
4.12.4 Access User Guide

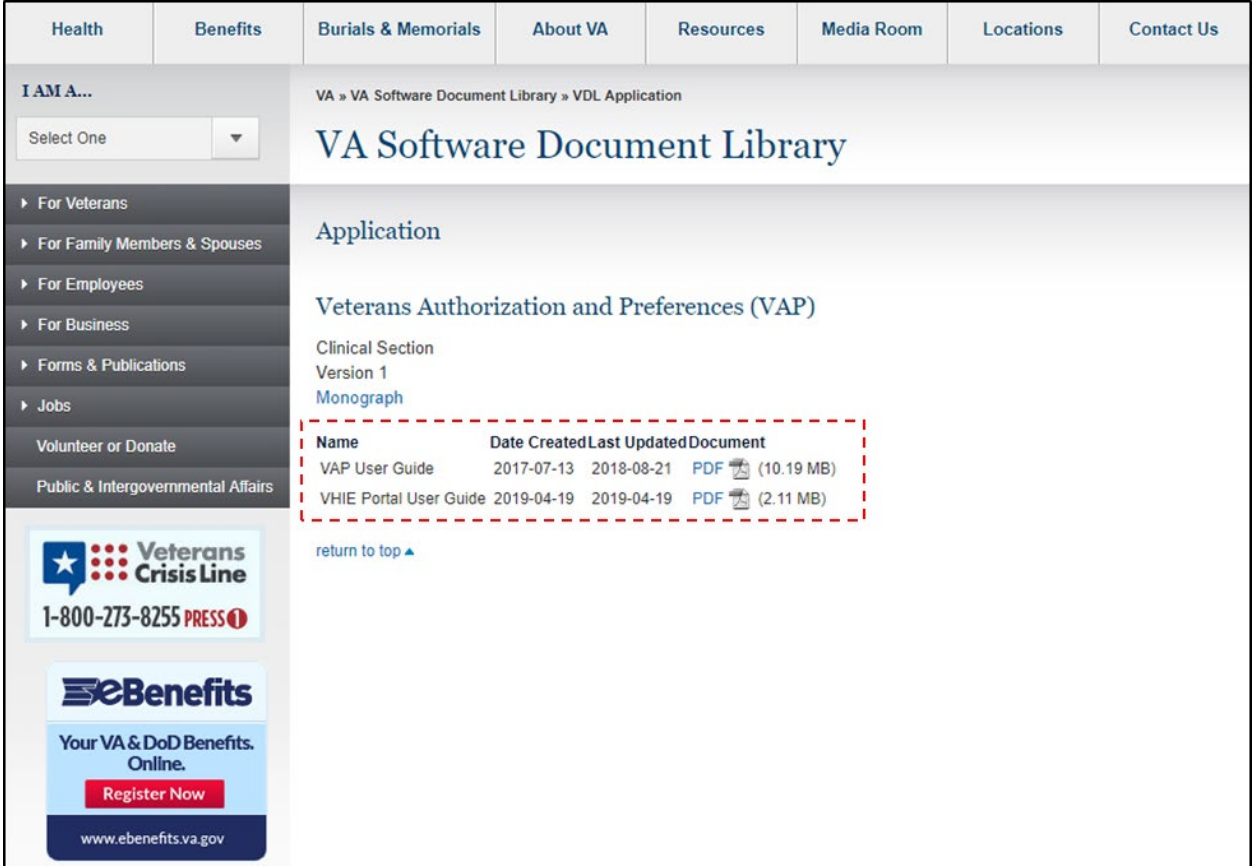
The VHIE user can access the VHIE Portal User Guide by selecting **User Guide** from the **Welcome** menu, under the username.

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.	<p>From the Welcome menu, select User Guide (Figure 78).</p> <p style="text-align: center;">Figure 78: Welcome Menu—Selecting User Guide</p>  <p>The screenshot shows the VHIE Portal interface. At the top, there is a dark blue navigation bar with the VA logo, 'VHIE PORTAL', and links for 'Patient Search', 'Reports', and 'Admin'. On the right side of the navigation bar, it says 'Welcome, vacolyf' and 'Sign Out'. A dropdown menu is open, showing three options: 'User Preferences', 'User Guide' (which is highlighted with a red arrow), and 'About VHIE Portal'. Below the navigation bar, there is a 'Patient Search' section with a dark blue header. Underneath, it says 'All Fields Required' and lists three input fields: 'Social Security Number', 'First Name', and 'Last Name'. A 'SEARCH' button is located at the bottom left of the search section.</p>

Step	Action												
2.	<p>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).</p> <p style="text-align: center;">Figure 79: VA Software Document Library (VDL)—VHIE Portal User Guide PDF</p>  <p>The screenshot shows the VA Software Document Library (VDL) website. The navigation bar includes links for Health, Benefits, Burials & Memorials, About VA, Resources, Media Room, Locations, and Contact Us. The main content area displays the title 'VA Software Document Library' and the application 'Veterans Authorization and Preferences (VAP)'. Below this, it lists 'Clinical Section', 'Version 1', and 'Monograph'. A table lists documents, with the 'VHIE Portal User Guide' highlighted by a red dashed box. The table has columns for Name, Date Created, Last Updated, and Document type/size. Below the table is a 'return to top' link. On the left side, there are promotional banners for the Veterans Crisis Line and eBenefits.</p> <table border="1" data-bbox="613 844 1179 940"> <thead> <tr> <th>Name</th> <th>Date Created</th> <th>Last Updated</th> <th>Document</th> </tr> </thead> <tbody> <tr> <td>VAP User Guide</td> <td>2017-07-13</td> <td>2018-08-21</td> <td>PDF (10.19 MB)</td> </tr> <tr> <td>VHIE Portal User Guide</td> <td>2019-04-19</td> <td>2019-04-19</td> <td>PDF (2.11 MB)</td> </tr> </tbody> </table>	Name	Date Created	Last Updated	Document	VAP User Guide	2017-07-13	2018-08-21	PDF (10.19 MB)	VHIE Portal User Guide	2019-04-19	2019-04-19	PDF (2.11 MB)
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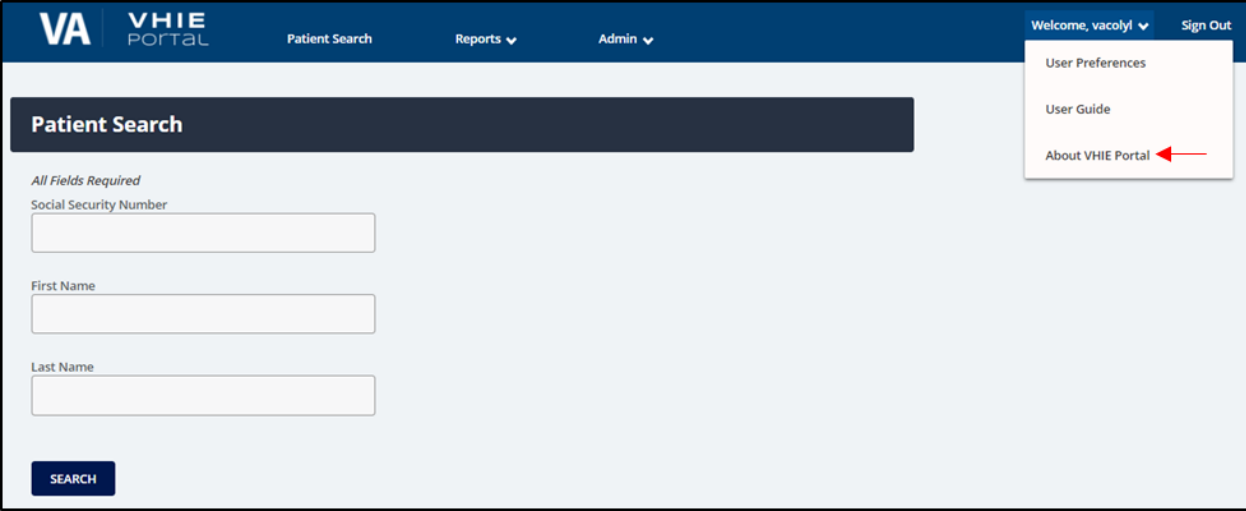
4.12.5 View System Software Information

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.	<p>From the Welcome menu, select About VHIE Portal (Figure 80).</p> <p style="text-align: center;">Figure 80: Welcome Menu—Selecting About VHIE Portal</p>  <p>The screenshot shows the VHIE Portal interface. At the top left is the VA logo and 'VHIE PORTAL'. The navigation bar includes 'Patient Search', 'Reports', and 'Admin'. On the right, the user is logged in as 'Welcome, vacolyf' with a 'Sign Out' link. A dropdown menu is open, showing 'User Preferences', 'User Guide', and 'About VHIE Portal', with a red arrow pointing to the 'About VHIE Portal' option. Below the navigation bar is a 'Patient Search' section with a dark header. Underneath, it says 'All Fields Required' and lists three input fields: 'Social Security Number', 'First Name', and 'Last Name'. A 'SEARCH' button is located at the bottom left of the search section.</p>

Step	Action
2.	<p>The information is displayed for the software version and the system status of the VHIE Portal (Figure 81).</p> <p style="text-align: center;">Figure 81: “About VHIE Portal” Screen</p> <div data-bbox="656 428 1230 894" style="border: 1px solid black; padding: 10px; margin: 0 auto; width: fit-content;"><p style="text-align: center;">About VHIE Portal</p><p style="text-align: center;">VHIE PORTAL</p><p style="text-align: center;">Version: 1.2.4</p><p style="text-align: center;">System Status: OK (200)</p></div>

5 Troubleshooting

5.1 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 <i>not</i> 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 <i>must</i> 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 <i>must</i> 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 <i>non-numeric</i> characters are entered.	The SSN field <i>must</i> contain exactly nine (9) numeric and no other characters before pressing the Search button. (The Last Name and First Name fields <i>must</i> also be populated.)
Patient Search Screen	Last Name is not valid. First Name is not valid.	The Last Name and First Name fields <i>must</i> 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 <i>must</i> 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 <i>must</i> 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 <i>must</i> 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.	<ol style="list-style-type: none"> 1. Right-click on the Date column. 2. Select Format Cells. 3. 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.	<ul style="list-style-type: none"> • 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 <i>must</i> open the saved file using Google Chrome or another XML viewer application (e.g., MS Edge or Notepad).

6 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