Revision History

**Note**: The revision history cycle begins once changes or enhancements are requested after the document has been baselined.

<table>
<thead>
<tr>
<th>Date</th>
<th>Revision</th>
<th>Description</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/16/2019</td>
<td>2.3</td>
<td>Updated UIs and language throughout to reflect most recent design changes.</td>
<td>VHIE Agile Development</td>
</tr>
<tr>
<td>04/05/2019</td>
<td>2.2</td>
<td>Added a note in Section 4.5 to let users know print functionality is available through the browser.</td>
<td>VHIE Agile Development</td>
</tr>
<tr>
<td>03/15/2019</td>
<td>2.1</td>
<td>Added a note under “Generate Documents” to recommend users to allow pop-ups and redirects in the browser’s setting for the VHIE Portal.</td>
<td>VHIE Agile Development</td>
</tr>
<tr>
<td>02/28/2019</td>
<td>2</td>
<td>Updated content, images, and document text to reflect Mission Act language.</td>
<td>VHIE Agile Development</td>
</tr>
<tr>
<td>01/17/2019</td>
<td>1</td>
<td>Initial Draft</td>
<td>VHIE Agile Development</td>
</tr>
</tbody>
</table>

**Artifact Rationale**

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

The Veterans Health Information Exchange (VHIE), formerly known as, the Virtual Lifetime Electronic Record (VLER) Program, has been 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 (HSEP). As part of the migration, HealthShare (HS) will consume legacy applications that relies on the connection with the eHX Adapter, and in this case, the Veteran Authorization and Preferences (VAP) system. At a high-level, VAP manages Patient consent and the requests for generating CDA-type documents for selected veterans. To improve the process for consent management 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 VHA personnel and other authorized users about using the VHIE Portal interface.

2. System Summary

The VHIE Portal application is hosted at the Austin Information Technology Center (AITC). 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. Log in via SSOi

Take the following steps to log in via SSOi [VHIE Portal Prod URL – TBD].

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 1: Log in via SSOi

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Navigate to the VHIE Portal Login screen at [VHIE Portal Prod URL – TBD].  
**Note:** If presented with the website’s security certificate error, click on “Continue to this website (not recommended)”.

![Security Certificate Error Message](image)

| 2.   | Login using your PIV card. |

![PIV Card Login](image)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 3.   | Select the appropriate certificate and click **OK**.  
**Note**: Always select the second certificate as the authentication certificate. If you see more than two certificates displayed, make sure to clear your browser’s cached certificates under Internet Tools.  |
| 4.   | Enter the PIN associated with your PIV card and click **OK**. |
### 3.2. Understanding the Functionalities

The VHIE Portal provides the following functionalities:

- Search for a Patient
- View Patient Demographic Details
- Participation Preference: Opt-Out Patient
- Participation Preference: Opt-In Patient
- Participation Preference: Delayed Consent
- View Patient Comments
- Generate CDA-Type Documents
- View Patient’s VA Treatment Facilities
- Search Menu – Return to Patient Search
- Report Menu – Summary Reports: Patient Opt-out
- Admin Menu – View or Edit Partner Organization(s)
- Admin Menu – View or Edit Facilities List
- Welcome Menu – Access User Guide
- Welcome Menu – View, Add, or Remove Default Facility
- Welcome Menu – View System Software Information
3.3. Exit System
Logout 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. Search for a Patient
The Patient Search screen allows a VHIE user to perform a basic search for the Patient.

**Note:** If the search returns only one result, the user will be directed straight to the Patient Demographic Details Page. If more than one results are returned, the multiple results will display for the user to select.

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

4.1.1. Basic Search Screen
The Basic Patient Search allows for a VHIE user to search by the Patient’s SSN, Last Name, and First Name.

**Note:** The SSN, Last Name, and First Name fields are all required fields.
4.1.2. **Patient Search Results**

If multiple results are returned, the VHIE user will be able to review the returned data traits and select the appropriate record by clicking any of the traits for the Patient.

**Note:** The screen provided for this section is only a UI mockup.
4.2. Patient Detail Summary

A VHIE user can view the Patient Detail summary page by selecting a veteran through the Patient Search workflow. This page is where the user can view the veteran’s identifying information and information including:

- Consent Status
- Comments
- Generate Documents
- Patient Facilities

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.
4.2.1. View Patient Details

The Patient’s demographic details will be displayed at the top of the screen (if available) for the VHIE user to view at any time.

Figure 3: Patient Demographic Details

![Patient Demographic Details]

4.2.2. Patient-centric Functions

The functional tabs allow the VHIE user to navigate to different pages to perform various tasks and retrieve important information on the Patient. The tabs include:

- Consent Status
- Correlations
- Comments
- Generate Documents
- Recent Activity
- Accounting of Disclosures
- Facilities

**Note:** Functionalities under the Tabs for Correlations, Recent Activity, and Accounting of Disclosures are targeted for a future release.
4.3. Consent Status Tab

The Consent Status Tab displays status information about the Patient’s participation preferences for Treatment, SSA-authorization for Coverage, and historical participation preference information. The Consent Status page also allows the VHIE user to initiate the task for processing a Patient’s preference to participate or not participate in sharing.

Prerequisite:

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

4.3.1. Participation Preference: Patient Opt-Out of Sharing

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

Prerequisite:

- The user has logged in via SSOi or another VA-approved method for authentication.
- The user has successfully retrieved a record from a Patient Search.
- The Patient has an opt-in consent status.
### Table 2: Patient Opt-out of Sharing

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>If the veteran is currently participating in sharing, there will be an Opt-Out option. Select the Opt-Out button to open the participation form and fill out the required information.</td>
</tr>
</tbody>
</table>
### 4.3.2. Participation Preference: Patient Re-participate in Sharing

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

**Prerequisite:**

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

**Note:** If the Patient had explicitly opted-out (not participating) in the legacy system, the opt-out preference is honored in HealthShare.
Table 3: Patient Re-participate in Sharing

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>If the veteran is currently not participating in sharing, there will be an Opt-In option. Select the Opt-In button to open the participation form and fill out the required information.</td>
</tr>
</tbody>
</table>

![Image showing the patient participation form and the Opt-In option.](Image)
2. Complete the required information fields and click the Save button to update the Veteran’s participation status.

4.3.3. Participation Preference: Delayed Consent for Opt-Out (Not Participating)

A VHIE user can take the following steps to process a delayed consent if the Patient has submitted paperwork to opt-out (not participating) of sharing, but there were discrepancies with the paperwork.

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.
- The Patient has submitted paperwork to out-out of sharing.
Table 4: Delayed Consent for Opt-Out (Not Participating)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>If the veteran is currently not participating in sharing, there will be an Opt-Out option. Select the Opt-Out button to open the participation form and fill out the required information.</td>
</tr>
</tbody>
</table>

![Image of VA VHA Patient Portal with delayed consent form]

---

**Patient Detail**

- Last Name: Chirone
- First Name: M
- MI: N/A
- Date of Birth: 1960/09/03
- SSN: 666-00-0001
- VA Number: 101 2581
- Address: 7341 Blount St, LA JOLLA, CA 92034
- Phone: 192 515 415

**Consent Status**

- Participation: Opt-Out

**Social Security Administration (SSA)**

The Veteran has been notified that health information is being shared with the Social Security Administration. The Veteran has the option to opt-out if they do not consent to the sharing of health information.

**Consent Directive**

- Consent Directive: Opt-Out
- Consent Date: 2019/06/08
- Consent Time: 10:20:23
- Consent by: [Name]

**Accounting of Disclosures**

- Date: 2019/06/08
- Reason: Opt-Out
- Action: Revoke Access
- Provider: [Name]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Under Validation Type, select one of the following Delayed Consent reasons, then click Save:</td>
</tr>
<tr>
<td></td>
<td>1. Delay this Authorization - Form not signed</td>
</tr>
<tr>
<td></td>
<td>2. Delay this Authorization - Form content altered</td>
</tr>
<tr>
<td></td>
<td>3. Delay this Authorization - Demographic changes</td>
</tr>
<tr>
<td></td>
<td>4. Delay this Authorization - Power of Attorney not on file</td>
</tr>
<tr>
<td></td>
<td>5. Delay this Authorization - Privacy Officer review</td>
</tr>
<tr>
<td></td>
<td>6. Delay this Authorization - Signature verification</td>
</tr>
</tbody>
</table>

![Required Fields and Validation Type form](image)
Step | Action
--- | ---
3. | When the participation status is currently Pending or Delayed, there will be options to Approve or Cancel the pending participation status.

4.3.4. **Participation Preference: Delayed Consent for Opt-In (Participating)**

A VHIE user can take the following steps to process a delayed consent if the Patient has submitted paperwork to participate in sharing, but there were discrepancies with the paperwork.

**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.
- The Patient has submitted paperwork to participate in sharing.
### Table 5: Delayed Consent for Opt-In (Participating)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>If the veteran is currently not participating in sharing, there will be an Opt-In option. Select the Opt-In button to open the participation form and fill out the required information.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>2.</td>
<td>Under Validation Type, select one of the following Delayed Consent reasons, then click Save: &lt;br&gt; 1. Delay this Authorization - Form not signed &lt;br&gt; 2. Delay this Authorization - Form content altered &lt;br&gt; 3. Delay this Authorization - Demographic changes &lt;br&gt; 4. Delay this Authorization - Power of Attorney not on file &lt;br&gt; 5. Delay this Authorization - Privacy Officer review &lt;br&gt; 6. Delay this Authorization - Signature verification</td>
</tr>
</tbody>
</table>

![Form Validation for Restriction Form 10-10117 Received and Validated](image)
Step | Action
--- | ---
3. | When the participation status is currently Pending or Delayed, there will be options to Approve or Cancel the pending participation status.

### 4.4. View Patient Comments

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

**Prerequisite:**
- The user has logged in via SSOi or another VA-approved method for authentication.
- The user has successfully retrieved a record from a Patient Search.
Table 6: View Patient Comments

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>To add a comment, under the Comments Tab, select “Add Comment”.</td>
</tr>
</tbody>
</table>

![Patient Detail](image)

- **Step 1**: To add a comment, under the Comments Tab, select “Add Comment”.

![Patient Comment History](image)
Step | Action
--- | ---
2. | A comment field and “Post Comment” button will appear on the right side of the screen.  
**Note:** Comments posted in this area are only viewable in VHIE Portal.

### 4.5. Generate CDA-Type Documents

A VHIE user can select the Generate Documents tab in the Patient Detail page to generate either the CCD v1.1 or CCD v2.1 health document.

**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 CDA-type document, the artifact is generated in a new browser window.
2) 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.
3) To print the CDA-type document, the user can utilize the browser’s built-in Print functionality to either print or do a print preview.

Figure 5: Generate CDA-type Documents

4.6. View Patient’s VA Treatment Facilities

A VHIE user can select the Facilities tab in the Patient Detail page to view the Patient’s VA Treatment Facilities.

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: The screen provided for this section is only a UI mockup.
4.7. Search Menu – Return to Patient Search

From within the VHIE Portal, a VHIE user can select the “Patient Search” option in the main navigation to return to the default Patient Search Page.

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


The Detailed Opt-out patient report can be found under the Reports menu > Detailed Reports. Fill in the report criteria and select Search to generate a report.

This report can be found under the Reports menu > Summary Reports.

Same steps as the detailed opt-out patient reports above.

4.10. Admin Menu – View or Edit Partner Organizations

A VHIE admin user can access the list of partner organizations through the Admin menu. To edit the list of Partner Organizations maintained within the VHIE Portal, select an organization name.

Prerequisite:

- The user has logged in via SSOi or another VA-approved method for authentication.
- The user is provided with elevated admin privileges.
4.11. Admin Menu – View or Edit Facilities List

A VHIE admin user can access the list of facilities through the Admin menu. To edit the list of Partner Organizations maintained within the VHIE Portal, select an organization name. To add a new facility, select the “Add Facility” button and fill out the form.

Prerequisite:

- The user has logged in via SSOi or another VA-approved method for authentication.
- The user is provided with elevated admin privileges.

The VHIE Portal user guide is located under the welcome menu, under the username.

Prerequisite:

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

Figure 12: Access User Guide
4.13. Welcome Menu – View, Add, or Remove Default Facility

A VHIE user can view or modify the account’s default facility by selecting “User Preferences” from the welcome menu, under the username.

Prerequisite:

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

Figure 13: Access User Preferences to Update Default Facility

Figure 14: View, Add, or Remove Default Facility


A 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.

Prerequisite:

- The user has logged in via SSOi or another VA-approved method for authentication.
Figure 15: Access VHIE Portal Software Information

Figure 16: VHIE Portal Software Version and Status
## 5. Troubleshooting

### 5.1. Special Instructions for Error Correction

<table>
<thead>
<tr>
<th>User Interface</th>
<th>Error</th>
<th>Cause</th>
<th>Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login Screen</td>
<td>User does not have permissions.</td>
<td>This is caused when the user account, passed from SSOi, is not mapped to the VHIE Portal user access list.</td>
<td>If you need access or have existing permissions, contact the Help Desk for support.</td>
</tr>
<tr>
<td>Patient Search Screen</td>
<td>SSN is required. Last Name is required. First Name is required.</td>
<td>The SSN, Last Name, and First Name fields must be filled before pressing the Search button. Any or all of these errors can occur depending on which fields were filled in and which were not.</td>
<td>The SSN, Last Name, and First Name fields must all be filled in before pressing the Search button.</td>
</tr>
<tr>
<td>Patient Search Screen</td>
<td>SSN is not valid.</td>
<td>The SSN field needs to contain nine (9) numeric characters. This error occurs if less than nine (9) numeric characters or any non-numeric characters are entered.</td>
<td>The SSN field must contain exactly nine (9) numeric and no other characters before pressing the Search button. (The Last Name and First Name fields must also be populated.)</td>
</tr>
<tr>
<td>Patient Search Screen</td>
<td>Last Name is not valid. First Name is not valid.</td>
<td>The Last Name and First Name fields must contain alphabetic characters only. Some special characters, such as periods and apostrophes, are allowed. Either or both errors can occur depending on which fields were filled incorrectly.</td>
<td>The Last Name and First Name fields must contain only alphabetic characters before pressing the Search button. (Some special characters are allowed, such as periods and apostrophes.)</td>
</tr>
<tr>
<td>Opt-out of Sharing Screen</td>
<td>Patient Signature Date must be after the date the authorization was signed.</td>
<td>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.</td>
<td>The Patient Signature Date field on the Opt-out of Sharing screen must be filled with a date later than the date the authorization was originally signed if you choose &quot;Opt-out&quot; as the reason.</td>
</tr>
</tbody>
</table>
6.  Acronyms and Abbreviations

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>508</td>
<td>Section 508 Accessibility</td>
</tr>
<tr>
<td>AITC</td>
<td>Austin Information Technology Center</td>
</tr>
<tr>
<td>CSV</td>
<td>Comma-Separated Values</td>
</tr>
<tr>
<td>DoD</td>
<td>Department of Defense</td>
</tr>
<tr>
<td>ESR</td>
<td>Enrollment System Redesign</td>
</tr>
<tr>
<td>HC IdM</td>
<td>Healthcare Identity Management</td>
</tr>
<tr>
<td>VHIE</td>
<td>Veterans Health Information Exchange</td>
</tr>
<tr>
<td>HITSP</td>
<td>Healthcare Information Technology Standards Panel</td>
</tr>
<tr>
<td>ICN</td>
<td>Integration Control Number (MVI)</td>
</tr>
<tr>
<td>ID</td>
<td>Identifier or Identification</td>
</tr>
<tr>
<td>MVI</td>
<td>Master Veteran Index</td>
</tr>
<tr>
<td>PDF</td>
<td>Portable Document Format</td>
</tr>
<tr>
<td>PII</td>
<td>Personally Identifiable Information</td>
</tr>
<tr>
<td>POC</td>
<td>Point of Contact</td>
</tr>
<tr>
<td>SSA</td>
<td>Social Security Administration</td>
</tr>
<tr>
<td>SSN</td>
<td>Social Security Number</td>
</tr>
<tr>
<td>TSPR</td>
<td>Technical Service Project Repository</td>
</tr>
<tr>
<td>UG</td>
<td>User Guide</td>
</tr>
<tr>
<td>UI</td>
<td>User Interface</td>
</tr>
<tr>
<td>URL</td>
<td>Uniform Resource Locator</td>
</tr>
<tr>
<td>VA</td>
<td>Department of Veterans Affairs</td>
</tr>
<tr>
<td>VAP</td>
<td>Veterans Authorizations and Preferences</td>
</tr>
<tr>
<td>VHA</td>
<td>Veterans Health Administration</td>
</tr>
<tr>
<td>VistA</td>
<td>Veterans Health Information Systems and Technology Architecture</td>
</tr>
<tr>
<td>VLER</td>
<td>Virtual Lifetime Electronic Record</td>
</tr>
<tr>
<td>WWW</td>
<td>World Wide Web</td>
</tr>
<tr>
<td>XML</td>
<td>Extensible Markup Language</td>
</tr>
</tbody>
</table>