

**Community Viewer Version 2.6 User Guide
for Community Care Providers**



December 2017

Department of Veterans Affairs (VA)

Office of Information and Technology (OI&T)

Table of Contents

1. Introduction	1
1.1. Purpose of the Guide	2
1.1.1. Guide Conventions	2
1.1.2. Terminology	2
1.2. Assumptions	2
1.3. System Requirements	2
1.4. Getting Help	3
2. Logging in to CV	4
2.1. Changing Your Password	7
2.2. The CV Portal Pages	10
2.2.1. Default View	10
2.2.2. Viewing System Status	11
2.2.3. Profile Settings	12
2.2.4. Using the Accessible Theme's Functionality	14
2.2.4.1. Keyboard Focus and Screen Navigation in Accessible Theme	15
2.3. Logging Out of the Current CV Session	16
3. Using CV	17
3.1. Access to Patient Data	17
4. Widgets	20
4.1. Accessing and Opening Widgets	21
4.2. Widget Navigation and Display Options	22
4.3. Minimized vs. Expanded Widget View	22
4.4. Displaying Widgets on Custom Tabs	23
4.5. Refreshing Widget Data	23
4.6. Printing	24
4.7. Examples of Widget Functionality	25
4.7.1. Patient Demographics	25
4.7.1.1. Viewing Detailed Patient Demographic Information	25
4.7.1.2. Viewing Third-party Insurance Information	25
4.7.2. Inpatient Medications	26
4.7.2.1. Inpatient Medications Widget Data	26
4.7.2.2. Viewing Inpatient Medication Details	27
4.7.2.3. Inpatient Medication Display and Filter Options	27
4.7.3. Lab Results	28
4.7.3.1. Lab Results Widget Data	28
4.7.3.2. Lab Results Display and Filter Options	29
4.7.3.3. Viewing Abnormal Results in the Lab Results Widget	29
4.7.3.4. Viewing Lab Results Details	30
4.7.3.5. Table View	30

4.7.3.6.	Graph View	30
4.7.4.	Problem List.....	30
4.7.4.1.	Problem List Widget Data.....	31
4.7.4.2.	Viewing Problem List Details.....	32
4.7.4.3.	Problem List Display and Filter Options	32

Table of Figures

Figure 1: Authorized Use Message	5
Figure 2: CCP User Login Page.....	5
Figure 3: CCP VA Privacy and Security Awareness Training Page	6
Figure 4: Password Expiration Notice on the Login Page	7
Figure 5: Password Reset Page	8
Figure 6: Password Reset Confirmation Message	8
Figure 7: Password Reset Dialog Box.....	9
Figure 8: Confirmation of Request Sent to Reset Password.....	10
Figure 9: CV Portal Tools.....	10
Figure 10: Default View	11
Figure 11: System Status Indicator on the Portal Pages	11
Figure 12: The CV Settings Dialog.....	12
Figure 13: Blue Theme	13
Figure 14: Gray Theme	13
Figure 15: Green Theme	14
Figure 16: Accessible (508 Compliant) Theme.....	14
Figure 17: Minimized View of the Assigned Patients Widget	18
Figure 18: Expanded View of the My Assigned Patients Widget	19
Figure 19: Widget Display on the Patient Portal	20
Figure 20: Widget Tray on the Patient Portal.....	21
Figure 21: Expanded View Widget Display	23
Figure 22: The Print Icon	24
Figure 23: Windows Print Dialog	24
Figure 24: Patient Demographics Widget	25
Figure 25: Inpatient Medications	26
Figure 26: Lab Results	28
Figure 27: Problem List Widget.....	31

Table of Tables

Table 1: Keyboard Accessible Keystrokes.....	15
Table 2: Widget Navigation Tool Descriptions.....	22

1. Introduction

Community Viewer (CV) is a browser-based software application that facilitates the secure exchange of data between Department of Veterans Affairs (VA) systems and authorized non-VA providers, known as Community Care Providers. The exchange of data improves the coordination of care and continuity of care for VA patients receiving treatment outside of the VA network.

CV pulls information from VA health care systems in real time for viewing within a web browser. Through CV, VA Staff assign patients to providers and provision their use within the CV system, allowing providers access to view consolidated patient data from multiple Veterans Information Systems and Technology Architecture (VistA) systems.

This User Guide is written for Community Care Providers, who use CV to perform the following tasks:

- Access and view patient data
- Request a password reset

Please read, and bear in mind, the following warning before using Community Viewer:

****WARNING**WARNING**WARNING****

“This U.S. Government computer system is for official use only.
The files on this system include Federal records that contain sensitive information.

**All activities on this system may be monitored to detect unauthorized access to,
or misuse of, the system or individual files and utilities on the system,
including personal use.**

Further use of this system constitutes your consent to such monitoring.

Misuse of, or unauthorized access to, this system may result in criminal
prosecution and disciplinary, adverse, or other appropriate action.”

****WARNING**WARNING**WARNING****

1.1. Purpose of the Guide

The purpose of this guide is to familiarize users with the important features and navigational elements of the CV application.

1.1.1. Guide Conventions

This document is designed for both online and hardcopy consumption. The following conventions are used throughout:

- [Cross-references](#) are indicated by blue, underlined text, and provide a hyperlink to figures, tables, and other sections within this guide
- Emphasis is conveyed by using **bold**, underlined and *italicized* text
- The information icon  is used to inform the reader of additional information

1.1.2. Terminology

The following standard terms are used throughout this guide:

- **Patient Portal:** The page that displays patient data via widgets
- **Provider Portal:** The landing page, or default view, of CV that opens after logging into the application; the Provider Portal displays widgets and the tools that enable quick access to basic features
- **Widget:** A component of the CV interface that enables a user to perform a function or access a service
- **Widget Tray:** The expandable and collapsible tray at the bottom of both portal pages that provides access to all widgets available for placement on the portal pages

1.2. Assumptions

This User Guide is written from the perspective of Community Care Providers, assuming the following:

- You can open, navigate, and use the menu options of a web browser
- You can use web-based applications, their menu options, and navigation tools
- You have received the required access credentials and the Uniform Resource Locator (URL) for the CV log in page
- You will use CV to view VA patient data relevant to patient assignments

1.3. System Requirements

CV is a front-end web application designed to run in a web browser. Accessing CV through a browser or device that is not fully compatible with the application may result in certain features not working as expected.

 **NOTE:** This release does not support mobile devices.

It is recommended that users access CV from a desktop or laptop PC using a supported browser, such as:

- Chrome v59
- EdgeHTML v14
- Firefox v54
- Internet Explorer (IE) v11
- Safari v10

1.4. Getting Help

If you are an authorized user in need of technical assistance, contact the Community Provider Technical Service Desk.

Prior to contacting support, please refer to [Section 2, Logging in to CV](#), for detailed information about how to access CV.



Community Provider Technical Service Desk

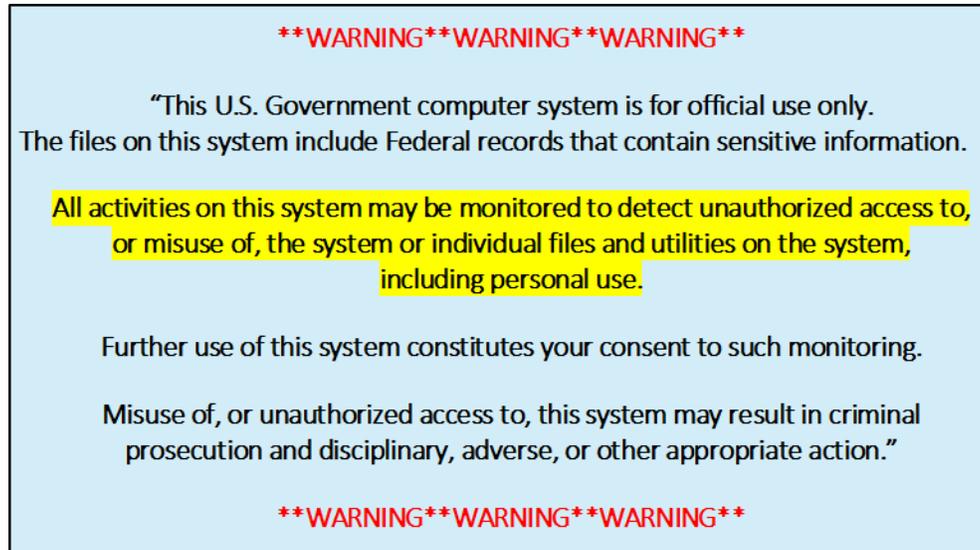
Phone: 844-788-6161

E-mail: Community_Provider_Technical_Service_Desk@va.gov

If you are an authorized user and do not have your password, follow the steps outlined in [Section 2.1, Changing Your Password](#), to request a password reset.

2. Logging in to CV

Before logging in to and utilizing the functionality of Community Viewer, please read the following:

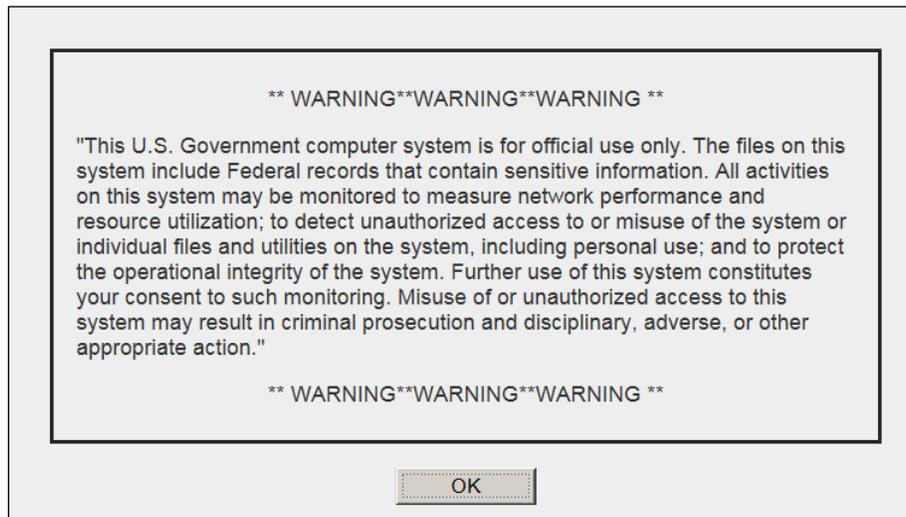


During log in, CV authenticates all providers against a registered list, provisioned by VA Staff. If you have not received credentials to access CV, you must first request access through the Community Provider Technical Service Desk.

To log in to CV:

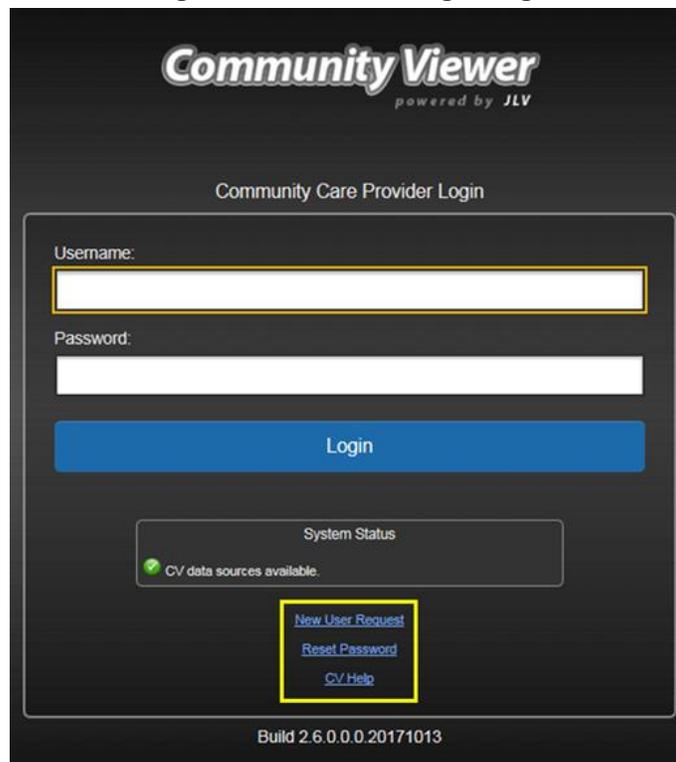
1. Open a supported Internet browser
2. Enter the web address for CV, provided by VA Staff, in the address bar of an approved Internet browser
3. The **Authorized Use** message ([Figure 1](#)), a security and legal disclaimer, appears
4. Click **OK** to confirm that you are aware you are accessing a government information system that is provided for authorized users only

Figure 1: Authorized Use Message



5. Enter your user name and password, provided by VA Staff, in the fields on the **Login** page ([Figure 2](#)):
 - a. Your user name is the e-mail address associated with your account
 - b. If you do not have, or have forgotten, your password, click the **Reset Password** link

Figure 2: CCP User Login Page



6. Click **Login**
7. If you are logging in to the CV application for the first time, (or 365 days after your first log in), the VA Privacy and Security Awareness Training page ([Figure 3](#)) appears

i **NOTE:** Users are required to perform **all** acknowledgement tasks before access to CV is granted.

Figure 3: CCP VA Privacy and Security Awareness Training Page

VA Privacy and Security Awareness Training

You are seeing this page for one of the following reasons:

1. You are attempting to access Community Viewer for the first time.
2. Your security and privacy training certification has expired.

For Community Viewer access, please download and review the following training documents to satisfy VA security and privacy requirements. You will need to complete this training every 12 months.

- [Information Security Awareness \(pdf\)](#)
- [Electronic Health Records Rules of Behavior \(pdf\)](#)

After reviewing the training documents above, you must check all of the following boxes to acknowledge the training in order to enable the "I Confirm" button and continue to Community Viewer.

I certify that I have completed and understand the Information Security Awareness training.

I certify that I have renewed and understand the Electronic Health Records Rules of Behavior.

I certify that I have completed and understand the HIPAA privacy training provided by my organization.

Acknowledgement of Accuracy

Under penalty of perjury, I attest that the above information is accurate and true to the best of my knowledge, and I have completed the training shown above.

i **NOTE:** The VA Privacy and Security Awareness Training page appears the first time you access the CV application, and again every 365 days after the first successful log in, as training certification must be renewed each year.

ALL of the acknowledgment tasks (Steps 8 – 13) must be completed to gain access to CV

8. Download and read the Information Security Awareness Training PDF document
9. Download and read the Electronic Health Records Rules and Behavior PDF document
10. Click the checkbox to certify that you have completed and understand the Information Security Awareness training
11. Click the checkbox to certify that you have read and understand the Electronic Health Records Rules and Behavior
12. Click the checkbox to certify that you have completed and understand the HIPAA Privacy training through your organization
13. Click **I Confirm** to proceed to the application

After logging in to CV:

- Your user name is displayed in the top-right corner of the page
- The patients assigned to you are shown in the **Assigned Patients** widget, under the **My Assigned Patients** tab
- The patients assigned to your practice group are shown in the **Assigned Patients** widget, under the **Group Assigned Patients** tab
- You will be able to see the patients assigned to your practice group even if you do not have any active or scheduled patient assignments

2.1. Changing Your Password

Your user ID (user name) is the e-mail address associated with your account, and cannot be changed unless your e-mail address changes.

You will be prompted to change your password every 90 days. Passwords are case-sensitive and must comply with the following structure guidelines:

1. Must be a minimum of 8 characters (no blank spaces can be used)
2. Must contain characters from 3 of these 4 categories:
 - a. An uppercase letter
 - b. A lowercase letter
 - c. A number
 - d. A special character (! @ # ? \$ % &)
3. Six of the characters cannot occur more than once in the password



NOTE: Passwords cannot be reused within a 2-year time period.

When your password has expired, you will see the message highlighted in [Figure 4](#) after an attempt to log in.

Figure 4: Password Expiration Notice on the Login Page

The screenshot shows the login page for Community Viewer, powered by JLV. At the top, the logo 'Community Viewer' is displayed in a stylized font, with 'powered by JLV' underneath. Below the logo, a red-bordered box contains the message: 'Your password has expired. An email containing a link to reset your password has been sent to the email address associated with your CV account.' Below this message, the text 'Community Care Provider Login' is centered. Underneath, there are two input fields: 'Username:' followed by a white text box, and 'Password:' followed by a white text box. The entire page has a dark background.

To reset your expired password:

1. Click the link in the password reset e-mail. The password reset page opens ([Figure 5](#))



NOTE: The password reset link is active for 24 hours.

Figure 5: Password Reset Page

Community Viewer
powered by JLV

Community Care Password Reset

New Password:

Confirm Password:

Submit

2. Create a new password following the password guidelines, and enter it in the **New Password** field
3. Repeat the password in the **Confirm Password** field
4. You will receive a confirmation message when your password has been successfully reset ([Figure 6](#))

Figure 6: Password Reset Confirmation Message

Community Viewer
powered by JLV

Community Care Password Reset

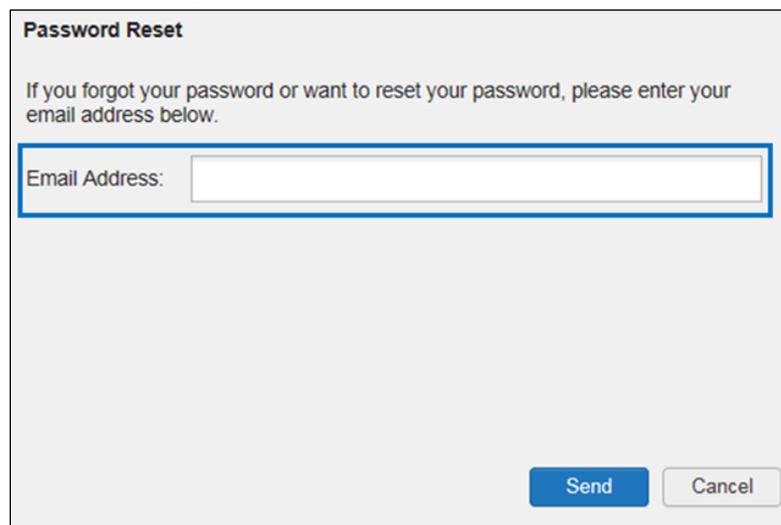
Your password was successfully updated.
[Click here to navigate to the Community Viewer Login page.](#)

If you have lost or cannot remember your password, you can request that your password be reset by using the **Reset Password** link on the login page, highlighted in [Figure 2](#).

To request a password reset:

1. Enter the web address for CV, provided by VA Staff, in the address bar of an approved Internet browser
2. Click the **Reset Password** link
3. The **Password Reset** dialog box opens ([Figure 7](#))

Figure 7: Password Reset Dialog Box



Password Reset

If you forgot your password or want to reset your password, please enter your email address below.

Email Address:

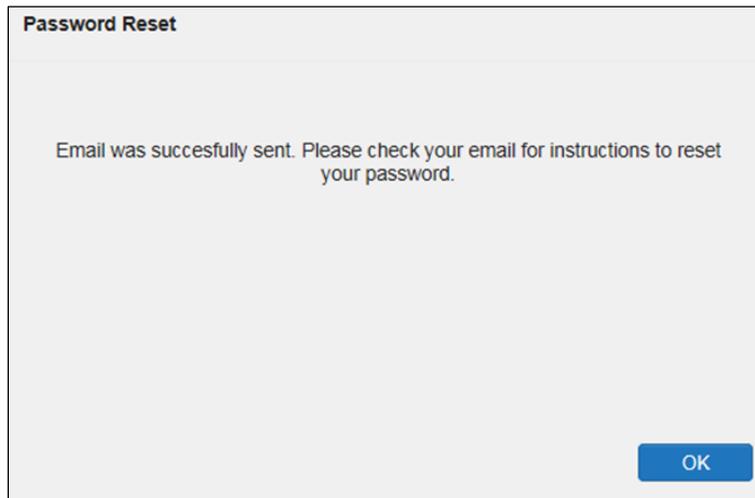
Send **Cancel**

4. Enter your e-mail address in the field provided in the dialog box
5. Click **Send**
6. A confirmation message is displayed ([Figure 8](#)), and an e-mail message is generated to Community_Provider_Technical_Service_Desk@va.gov
7. A password reset link is sent to the e-mail address you provide, and a confirmation message appears ([Figure 8](#))



NOTE: The password reset link is active for 24 hours.

Figure 8: Confirmation of Request Sent to Reset Password



2.2. The CV Portal Pages

The CV portal pages have tools that enable quick access to basic features. These tools appear in the top-right corner of the application window (detailed in [Figure 9](#)).

- **Select the UI theme:** Click the **cog wheel**  to configure the UI theme. See [Section 2.2.3, Profile Settings](#).
- **Access online help:** Click **Help**  to open web-based, online help.
- **Log out:** Click **Logout**  to terminate the current CV session

Figure 9: CV Portal Tools



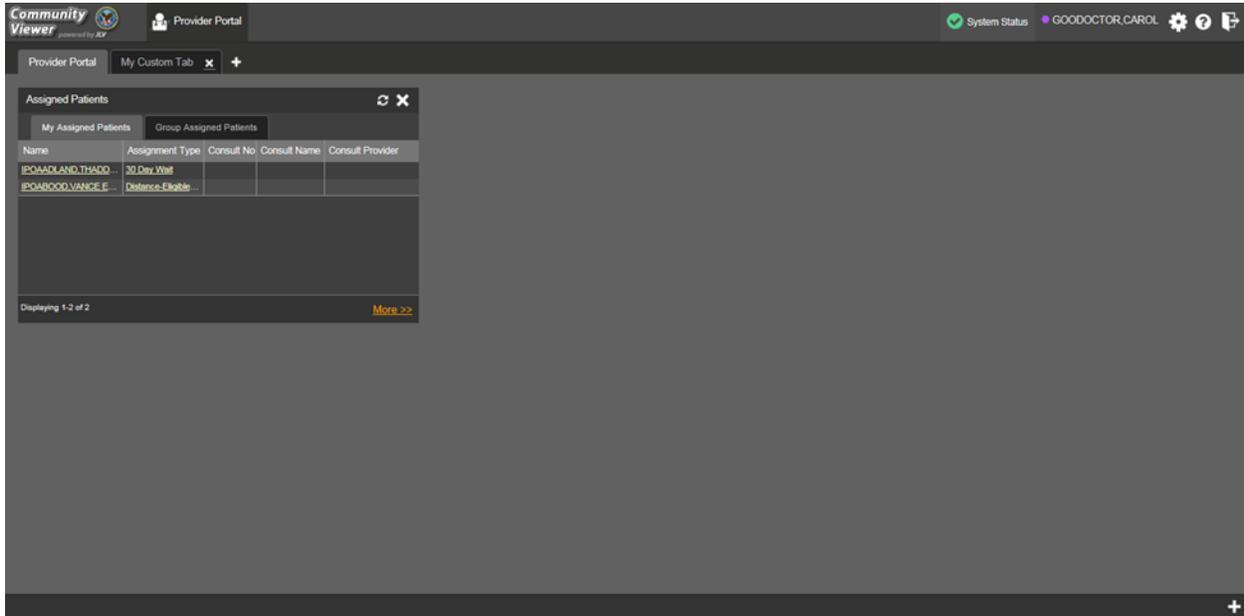
2.2.1. Default View

The default view of CV includes the **Assigned Patients** widget ([Figure 10](#)).



NOTE: If the **Assigned Patients** widget is not open, click the plus (+) sign in the lower-right corner of the screen ([Figure 10](#)) to open the **Widget Tray**. Click, hold, and drag the widget icon from the tray to the screen, and drop it in the desired location.

Figure 10: Default View



2.2.2. Viewing System Status

System status updates are received from CV's Health Monitor, which monitors the services that CV uses to connect to VA data sources.

There are two areas of CV where system status is displayed:

1. On the log in page
2. On the portal pages (highlighted in [Figure 11](#))

When all monitored systems and services are online and connected, a green icon  appears beside **System Status**. The message *CV data sources are available* ([Figure 11](#)) appears when you hover over the

When one or more monitored systems or services are offline or unavailable, a yellow warning icon  appears with the message *CV is having problems*.

When CV's health monitor is unable to retrieve and report system status information, a red icon  appears with the message, *System status is unavailable*. When this status appears, you may not be able to log into CV or view patient data until the connection is restored. See [Section 1.4, Getting Help](#), for information on how to contact support.

Figure 11: System Status Indicator on the Portal Pages



2.2.3. Profile Settings

Profile settings are accessible within CV by clicking the **cog wheel**  in the top-right corner of the portal pages ([Figure 10](#)).

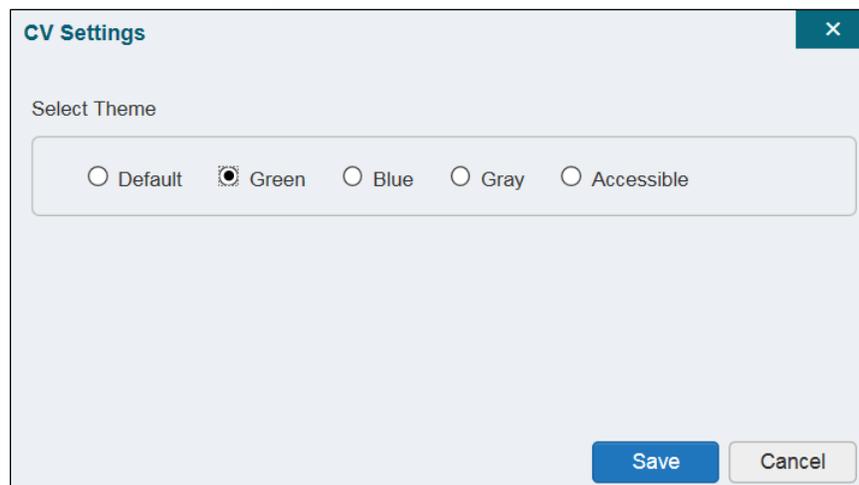
 **NOTE:** In this release, the configuration options are limited to choosing a UI theme.

Selecting a **User Interface Theme** sets the font color, foreground, and background colors of CV. Themes apply to all application elements, including widgets, toolbars, and dialog boxes. The UI theme color choices are Default, Green, Blue, Gray, and Accessible. The Accessible theme ([Figure 16](#)) is 508-compliant, and designed to work with the accessibility features installed on a user's device.

To set the UI theme:

1. Click the **cog wheel**  in the top-right corner of the application
2. The **CV Settings** dialog opens ([Figure 12](#))
3. Click the radio button next to the desired theme
4. Click **Save**
5. After clicking **Save**, you are asked whether or not to save the configuration. Click **Yes** to reload the application and apply the selected theme **-OR-**
6. Click **Cancel** to exit the **CV Settings** dialog and restore the previous theme

Figure 12: The CV Settings Dialog



Examples of the UI themes are displayed in the figures below. The Default theme was presented in [Section 2.2.1, Default View](#).

Figure 13: Blue Theme

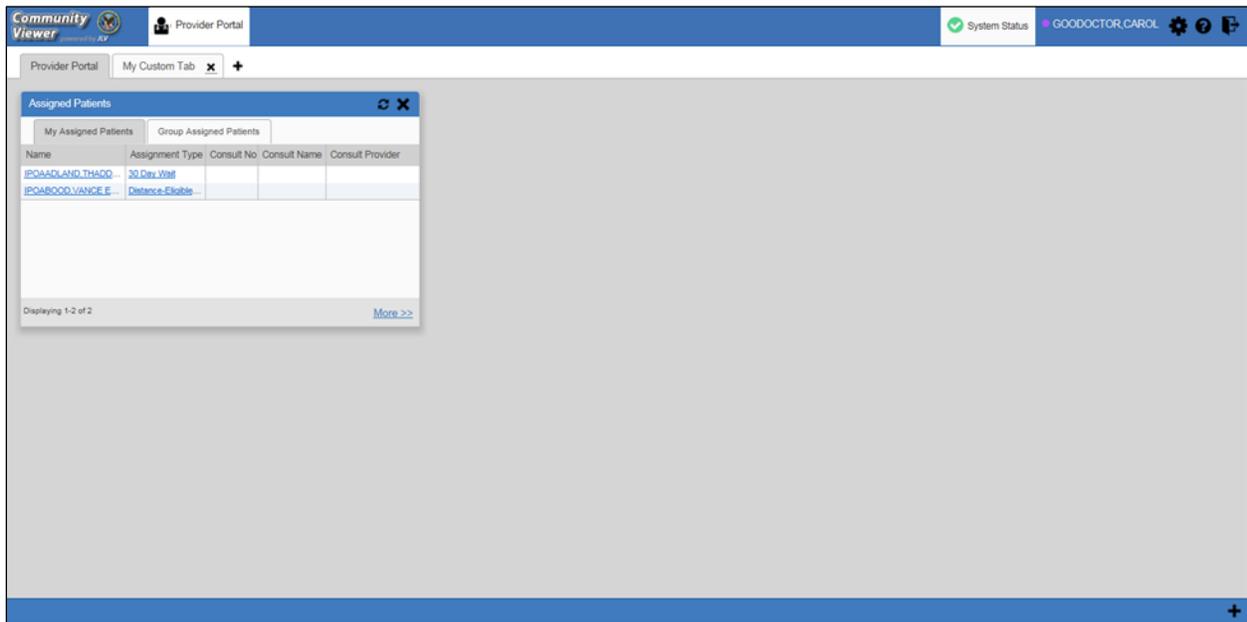


Figure 14: Gray Theme

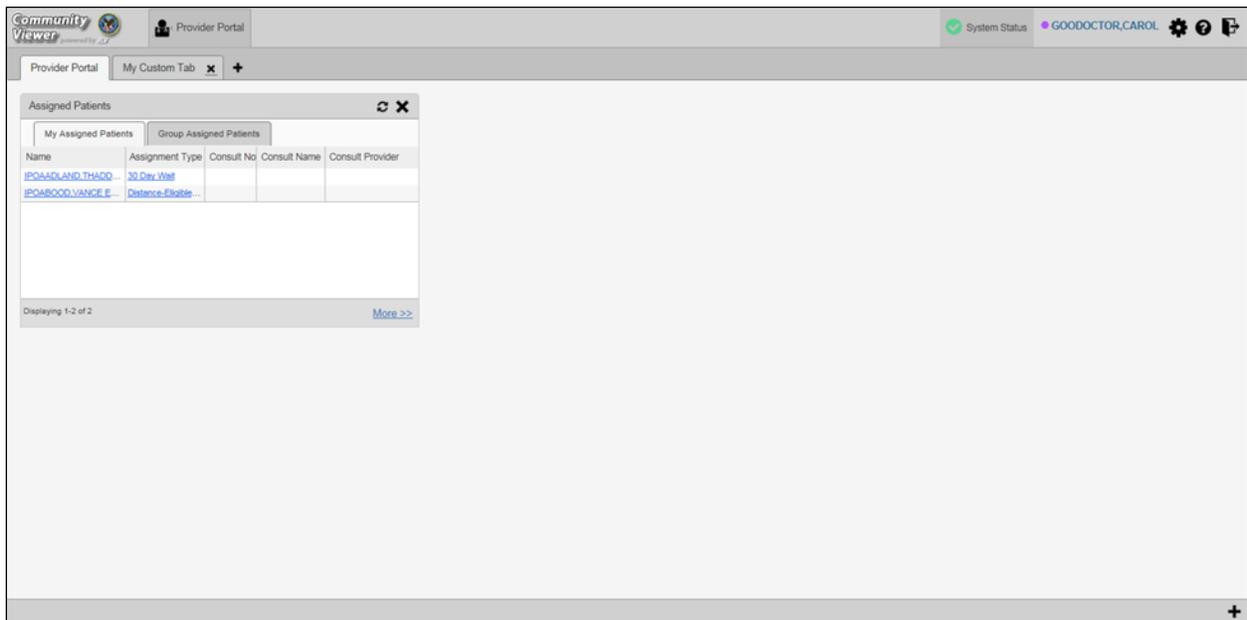


Figure 15: Green Theme

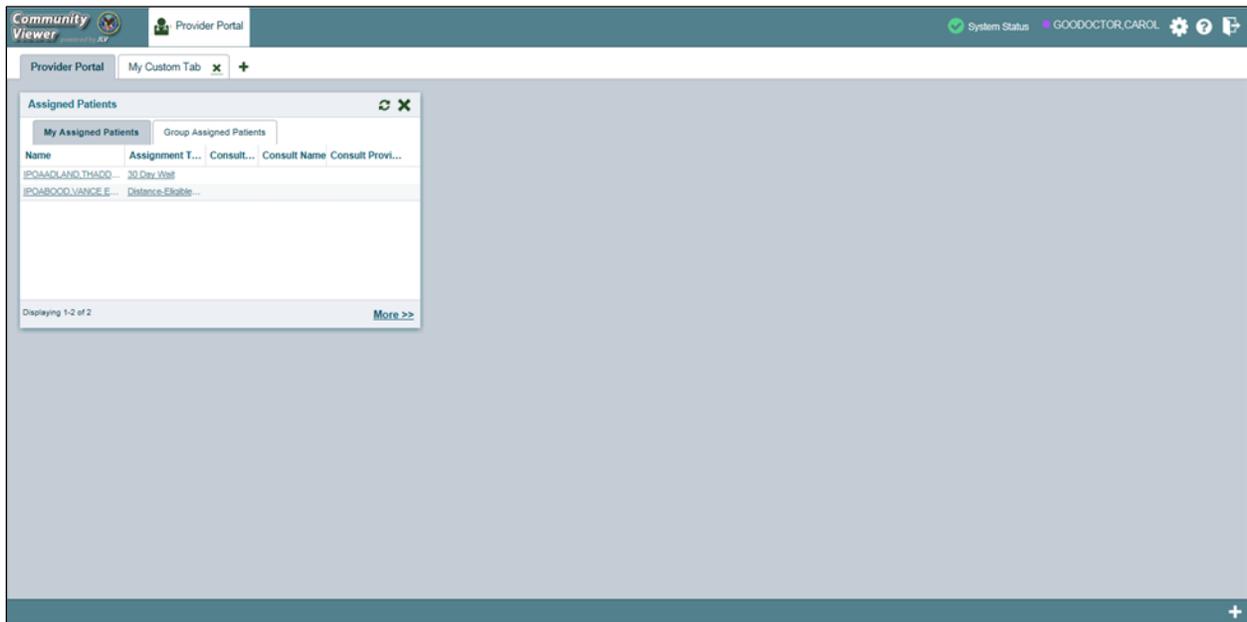
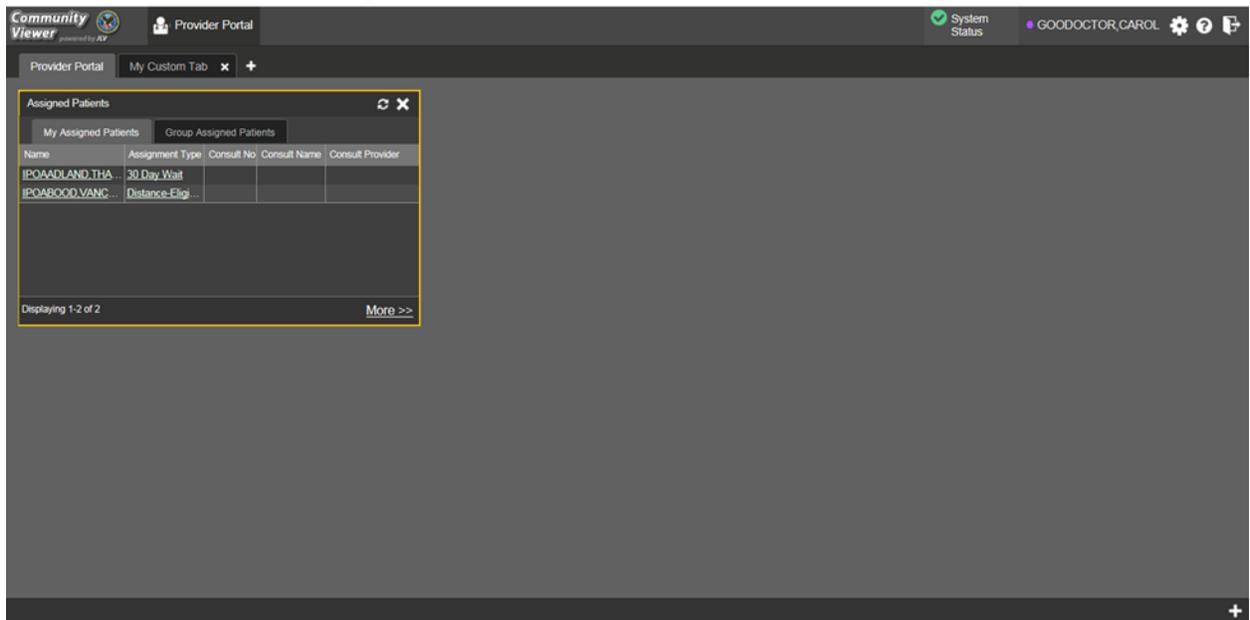


Figure 16: Accessible (508 Compliant) Theme



2.2.4. Using the Accessible Theme's Functionality

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

2.2.4.1. Keyboard Focus and Screen Navigation in Accessible Theme

Keyboard focus is the highlighting of screen elements that enables interaction with, and the navigation of, the web application through the keyboard and keystrokes. The screen element in focus is outlined in gold ([Figure 16](#)) as a visual indicator of keyboard focus.

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

Pressing **Enter** or the **Spacebar** when an element that provides action is in keyboard focus performs the associated action. For example, pressing **Enter** or the **Spacebar** when the **cog wheel** icon is in focus opens the **CV Settings** dialog box. Using the arrow keys or the **Tab** key allows a user to move between keyboard focus items to navigate through screen elements. A complete list of accessible keystrokes is provided in [Table 1](#).

Table 1: Keyboard Accessible Keystrokes

Keystroke	Description
<i>Application and Portal Navigation</i>	
ENTER	Press to transfer keyboard focus to the highlighted widget.
TAB	Press to transfer keyboard focus to other user interface items.
ESC	Press to return keyboard focus to the panel containing the user interface item with keyboard focus or to exit a window or widget.
SPACEBAR	Press to activate any user interface item (for example, click a button).
Arrow Keys	When keyboard focus is on a widget, press the arrow keys to change page viewing in a widget's data table. When keyboard focus is on a dropdown list, press the down arrow to view the contents.
<i>Tab Panels</i>	
Arrow Keys	Use the left and right arrow keys to change tab panels. To add a tab panel, press the right arrow key until the last tab (+) is selected. A dialog prompts the user to enter the tab name.
Ctrl + x	To close a tab, focus on the tab panel and press Ctrl + x.
<i>Windows and Dialog Boxes</i>	
TAB	Press the Tab key to move the keyboard focus to other user interface items within the window.
<i>Adding Widgets to the Portal Pages</i>	
Number Position	To add a widget from the widget tray using keystrokes: 1. Determine which column (1, 2, or 3) to place the widget on the portal page. 2. Focus the desired widget in the widget tray and press the 1, 2, or 3 key, depending on the desired column placement.

2.3. Logging Out of the Current CV Session

You may intentionally log out to end a CV session by clicking **Logout**  at any time. If you fail to log out, your session will automatically terminate after five minutes of inactivity. You will be redirected to the **Login** page when any new activity is attempted.

3. Using CV

3.1. Access to Patient Data

Prior to accessing patient data in Community Viewer, please read the following:

****WARNING**WARNING**WARNING****

“This U.S. Government computer system is for official use only.
The files on this system include Federal records that contain sensitive information.

**All activities on this system may be monitored to detect unauthorized access to,
or misuse of, the system or individual files and utilities on the system,
including personal use.**

Further use of this system constitutes your consent to such monitoring.

Misuse of, or unauthorized access to, this system may result in criminal
prosecution and disciplinary, adverse, or other appropriate action.”

****WARNING**WARNING**WARNING****

After you log in to CV, the **Assigned Patients** widget appears, displaying a list of your patient assignments. Click a patient’s name in the list on the **My Assigned Patients** tab ([Figure 17](#)) to open their records in the **Patient Portal**.



NOTE: If the **Assigned Patients** widget is not open, click the plus (+) sign in the lower-right corner of the portal to open the **Widget Tray**. Click, hold, and drag the widget from the tray to the screen, and drop it in the desired location.

The **Assigned Patients** widget also lists the active and scheduled assignments for all providers in the group to which you belong on the **Group Assigned Patients** tab. If there are two active assignments for one patient, the patient is listed twice.

The following information is available for each assignment listed in the widget:

- **Name:** Click the entry to open the patient’s record in the **Patient Portal**
- **Assignment Type:** The type of assignment that initiated the patient referral:
 - 30 Day Wait
 - Consult
 - Distance Eligible
 - Episode of care
- **Consult No.:** A number generated by the VA system for the patient consult. Click the entry to open the patient’s record in the **Patient Portal**. This information is only shown for patients with a *Consult* assignment type

- **Consult Name:** A label generated by the VA system. Click the entry to open the patient’s record in the **Patient Portal**. This information is only shown for patients with a *Consult* assignment type
- **Consult Provider:** The VA provider who ordered the consult. This information is only shown for patients with a *Consult* assignment type

Figure 17: Minimized View of the Assigned Patients Widget

Assigned Patients				
My Assigned Patients		Group Assigned Patients		
Name	Assignment Type	Consult No	Consult Name	Consult P
IPOADAMIAK,PHIL KEITH	Distance-Eligible (40 mile)			

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

i **NOTE:** [Figure 17](#) depicts the default view of the **Assigned Patients** widget. Because the widget is width-constrained, some of the column headings will appear in an abbreviated manner.

The tab in the **Assigned Patients** widget that is active (currently selected) is highlighted. **My Assigned Patients** is the active tab, by default. Clicking the **More>>** link in the bottom right corner of the widget opens the expanded view of the active tab ([Figure 18](#)).

Figure 18: Expanded View of the My Assigned Patients Widget

My Assigned Patients (1)				
Name	Assignment Type	Consult No	Consult Name	Consult Provider
IPOADAMIAK,PHIL KEITH	Distance-Eligible (40 mile)			

Displaying 1-1 of 1 [Show All](#)

4. Widgets

Patient-centric information is displayed on the **Patient Portal** through widgets. Widgets are elements of CV that display data specific to an administrative or clinical domain. Data is generally displayed in reverse chronological order, by date.



NOTE: Widgets may take anywhere between three (3) and ten (10) seconds to load.

The default layout of the **Patient Portal** for a first-time CV user is shown in [Figure 19](#). The widgets presented are the **Patient Demographics**, **Problem List**, **Allergies**, **Consults**, **Progress Notes**, **Encounters**, and **Lab Orders/Panel Results**.

Figure 19: Widget Display on the Patient Portal

The screenshot displays the Patient Portal interface for patient IPOAADLAND, THADDEUS A. The interface is organized into several widgets:

- Patient Demographics:** Shows patient name, address (4206 NORTH HAMPTON CT, FORT COLLINS, COLORADO 80525), SSN (191956640), age (73), DOB (23 Oct 1944), race (White), sex (M), PCN Name (SCARFI, GONZALO D), PCN Date (Dec 02, 2010), and PCN Team (TEAM PTC 3).
- Problem List (14):** A table listing medical conditions such as FAMILY HISTORY, SARCROIDOSIS, ILLNESS UNSPE, Acute Thoracic Infe, and Hyperlipidemia, with columns for ICD, Onset, Description, Updated, Status, and Site.
- Allergies (10):** A table listing allergens like CAFFEINE, CHOCOLATE, CYLEX, and FRYTHRIMON, with columns for Date Recorded, Allergen, and Site.
- Consults (7):** A table listing dental and medical consultations with columns for Date, Consult Order, Status, and Site.
- Progress Notes (20):** A table listing various medical notes and progress reports with columns for Date, Document Type/Title, Provider, and Site.
- Encounters (29):** A table listing patient encounters with columns for Date, Clinic, Provider, Diagnosis, and Site.
- Lab Orders / Panel Results (7):** A table listing laboratory tests and their results with columns for Collection Date, Order / Result, and Site.

In addition to the default widget layout on the **Patient Portal**, first-time CV users will see a series of tabs, each providing a different widget layout:

- **Encounters Tab:** Encounters, Appointments, and Progress Notes widgets
- **Results Tab:** Radiology Exams, Lab Orders/Panel Results, Procedures, Progress Notes, and Lab Results widgets
- **Medications Tab:** Allergies, Inpatient Medications, Orders, and Outpatient Medications widgets
- **Documents Tab:** Encounters, Discharge/Essentris Notes, and Progress Notes widgets
- **Consults Tab:** Consults, Discharge/Essentris Notes, and Progress Notes widgets
- **Immunizations:** Immunizations, Problem List, and Progress Notes widgets

The list of available widgets for display on the **Patient Portal** is presented in a horizontal tray at the bottom of the page (highlighted in [Figure 20](#)). Data from VA systems is available for the following VA clinical domains:

- Patient Demographics
- Admissions
- Allergies
- Appointments
- Clinical Reminders
- Consults
- Discharge/Essentris Notes
- Encounters
- Immunizations
- Inpatient Medications
- Lab Panel Results
- Lab Results
- Outpatient Medications
- Orders
- Problem List
- Procedures
- Progress Notes
- Radiology Exams
- Vitals

4.1. Accessing and Opening Widgets

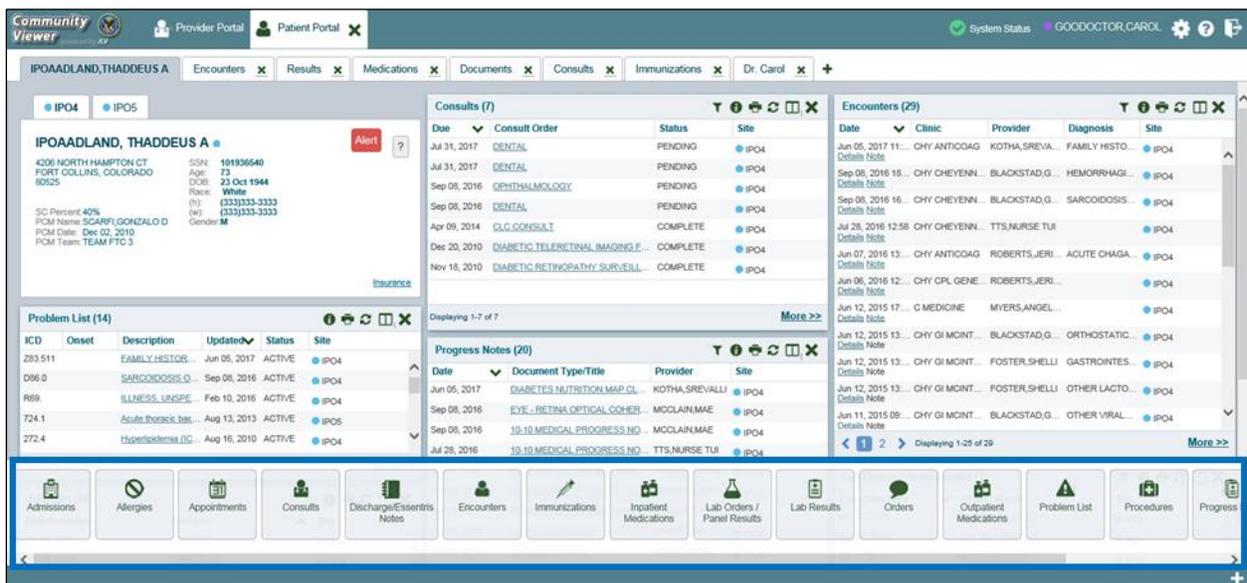
[Figure 20](#) depicts the **Patient Portal** with an open **Widget Tray**, highlighted at the bottom of the screen. Click the plus sign (+) in the lower right-hand corner to open the **Widget Tray**. Click, hold, and drag a widget from the tray to the portal. This action opens the widget in minimized view, and docks it on the portal.

To view all available clinical domains in the widget tray, use the arrows (< or >) placed below the tray icons in the lower left- and right-hand corners of the screen. Clicking the arrows will scroll left to right, or right to left through the tray.



NOTE: Widgets can be removed from a portal page and placed back into the **Widget Tray** by clicking **Close** **X** in the top-right corner of the docked widget.

Figure 20: Widget Tray on the Patient Portal



4.2. Widget Navigation and Display Options

Navigation tools and display options are provided within each widget (listed in [Table 2](#)).

Click **More >>** in the lower-right corner of a widget in minimized view to open the widget in expanded view, as seen in [Figure 21](#).

A widget in expanded view contains the **Show All** link which opens all records for a given widget in a scrollable window. Click the **Show Paged** link to return a display of records grouped by pages.

Table 2: Widget Navigation Tool Descriptions

Widget Element	Meaning	Description
	Go to Previous Page	Changes the focus of the widget to the previous group or page of records within the results display.
	Jump to Page	Changes the focus of the widget to the page number selected.
	Go to Next Page	Changes the focus of the widget to the next group or page of records within the results display.
More >>	Go to Expanded View	Available in minimized views only. Opens the expanded view of the widget in a secondary window.
[variable] of #	Record Display Indicator	Indicates the number of records displayed in that widget page out of the total number of results for that widget.
Show All/Show Paged	Display Setting	Click Show All to open all records for a given widget in a scrollable window. Click Show Paged to return to the display of records grouped by pages.

4.3. Minimized vs. Expanded Widget View

Each widget can be displayed in either a minimized or expanded view. The default rendering of a widget is in minimized view ([Figure 19](#)). Click the **More >>** link at the bottom of the widget in minimized view to open the expanded view ([Figure 21](#)).

The expanded view of a widget provides additional display and filtering options. Click **Configure Filter**  from the widget toolbar if the additional display configuration options are not displayed in expanded view.

Figure 21: Expanded View Widget Display

To reduce the amount of information shown, narrow the date range.

Start date: 07/20/2010 End date: 10/26/2017 [Apply](#) [Close Filter](#)

Filter by Drug Name: Filter by Standardized Drug Name: Filter by Ordering HCP Specialty:

Order Number	Drug Name	Standardized Drug Name	Status	Ordering HCP	Ordering HCP Specialty	Start Date	Stop Date	Schedule	Quantity	Site
— Order Number: 5587843										
5587843	VORICONAZOLE 200MG TAB	voriconazole 200 MG Oral Tablet	DISCON...	YACKEREN,STER...	P	Jun 14, 2015	Jun 14, 2015	Give: 200MG PO Q12H PRN		IPO4
— Order Number: 5587844										
5587844	NICOTINE 10MG/CART ORAL INHL 168KIT	168 ACTUAT Nicotine 4 MG/ACTUAT Metered Dose Inhaler	DISCON...	YACKEREN,STER...	P	Jun 14, 2015	Jun 14, 2015	Give: ONE PUFF INHL AS DIRECTED		IPO4
— Order Number: 5587845										
5587845	MORRHUATE SODIUM 50MG/ML 30ML INJ	Sodium Morrhuate 50 MG/ML Injectable Solution	DISCON...	YACKEREN,STER...	P	Jun 14, 2015	Jun 14, 2015	Give: 50MG/1ML IV 2X/WEEK		IPO4
— Order Number: 7226382										
7226382	CYPROHEPTADINE HCL 4MG TAB	Cyproheptadine hydrochloride 4	ACTIVE	MYERS,ANGELA M	Allopathic and Osteopathic	Jun 05, 2014	Sep 03, 2014	Give: 8MG PO AT BEDTIME		IPO5

Displaying 1-6 of 6 [Show All](#)

4.4. Displaying Widgets on Custom Tabs

You can use the *custom tabs* feature to create additional widget configurations for ease of use and quick reference. Changes made to the patient portal display (widget layouts and custom tabs) are saved to the user profile, and are displayed in future sessions.

To set up a customized tab:

1. Click the plus sign + to the right of the tabs along the top of the **Patient Portal** ([Figure 19](#)). The **Add Tab** dialog box opens
2. Type a name for the new tab in the **Add Tab** dialog box, and click **OK**
3. Open the **Widget Tray** within the new tab space, then click, hold, and drag each of the desired widgets to the screen
4. Click between tabs at any time, without losing any of the configurations created in the tabs. Tabs persist, even when a patient change is made

4.5. Refreshing Widget Data

Data in the widget display can be refreshed by clicking **Refresh** . This action updates the data in the widget.

4.6. Printing

You can print the information within the CV widgets from either the minimized or expanded views.

If printing from the default (minimized) view of a widget, the information that is presented by default is captured for printing.

If you have filtered the information in the widget, the filtered information is captured for printing.

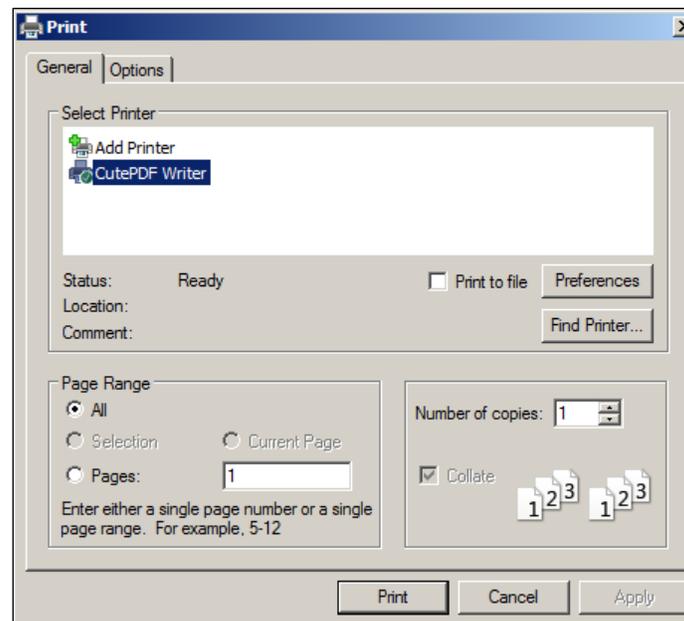
Figure 22: The Print Icon



To print information from a widget:

1. Click the **Print** icon (highlighted in [Figure 22](#)) at the top of either the minimized or expanded view of a widget
2. A new window opens and displays either the default or filtered widget information
3. The **Windows Print** dialog ([Figure 23](#)) opens and lists the available printers

Figure 23: Windows Print Dialog



4. Select the desired printer
5. Click **Print**

4.7. Examples of Widget Functionality

The **Patient Portal** displays the selected patient's clinical records and other patient-centric information. The **Patient Demographics**, **Inpatient Medications**, **Lab Results**, and **Problem List** widgets, detailed in the following subsections, provide examples of widget functionality.

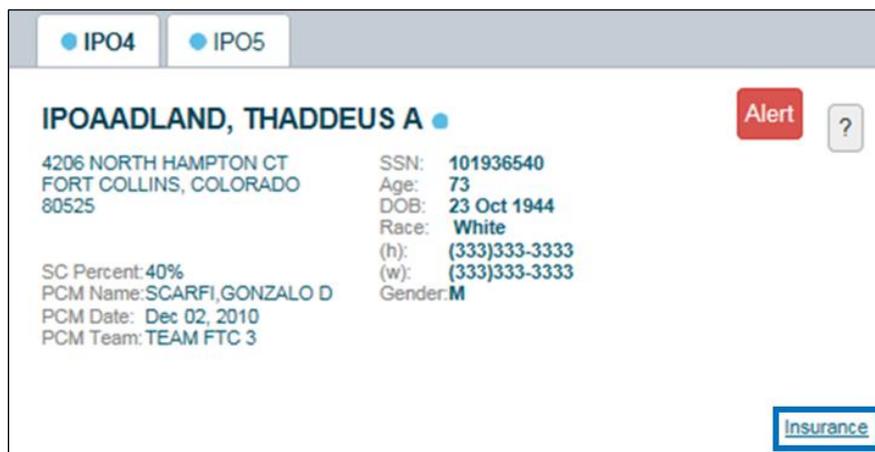
 To see detailed information for all available widgets in CV, click **Help**  in the top-right corner of the portal pages.

4.7.1. Patient Demographics

A summary of the patient's demographics (personal data) appears in the top-left section of the **Patient Portal** ([Figure 24](#)). The tabs above the patient's name provide the patient's demographics summary at each VA site that the patient has visited.

The patient's name is displayed in color and is followed by a blue circle. The blue circle represents that the data was retrieved from a VA system.

Figure 24: Patient Demographics Widget



4.7.1.1. Viewing Detailed Patient Demographic Information

Additional patient demographic information is available from the **Demographics** widget on the **Patient Portal**. Click the patient's name to open a separate window that provides a detailed list of demographic information for that patient.

4.7.1.2. Viewing Third-party Insurance Information

Third-party payers and additional insurance information are available from a link within the **Demographics** widget on the **Patient Portal** (highlighted in [Figure 24](#)). Click the **Insurance** link in the **Demographics** widget. A separate window opens to display a detailed list of insurance information for the patient.

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

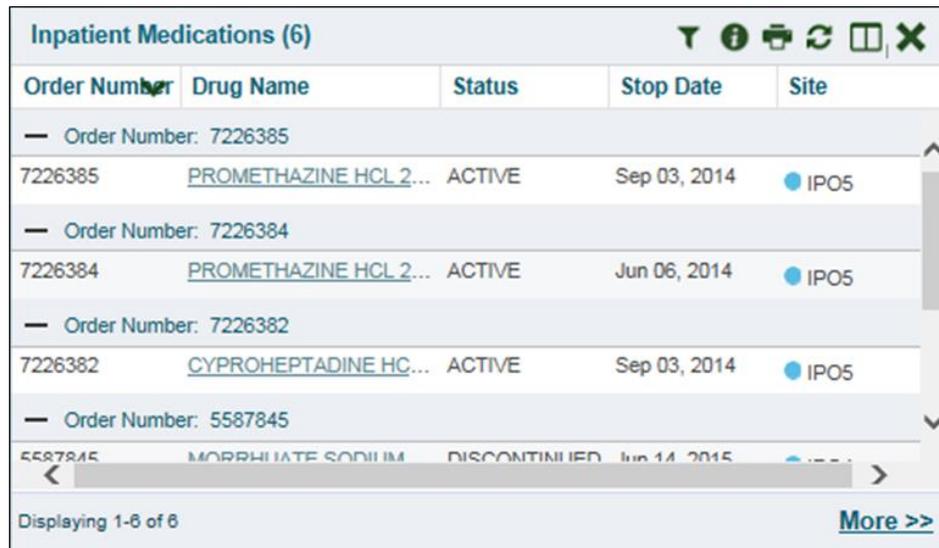
Data in the **Standardized Insurance Type** column is normalized to the X12 Health Insurance Type standard. Hover over entries in this column to display the standardized name and code for the insurance type.

4.7.2. Inpatient Medications

The  **Inpatient Medications** widget ([Figure 25](#)) displays inpatient medication information. The medications are grouped by the order number, where available.

To open the widget, click and hold **Inpatient Medications** in the widget tray, drag it to the desired location on the screen, and drop it.

Figure 25: Inpatient Medications



Order Number	Drug Name	Status	Stop Date	Site
— Order Number: 7226385				
7226385	PROMETHAZINE HCL 2...	ACTIVE	Sep 03, 2014	IPO5
— Order Number: 7226384				
7226384	PROMETHAZINE HCL 2...	ACTIVE	Jun 06, 2014	IPO5
— Order Number: 7226382				
7226382	CYROHEPTADINE HC...	ACTIVE	Sep 03, 2014	IPO5
— Order Number: 5587845				
5587845	MORPHIATE SODIUM	DISCONTINUED	Jun 14, 2015	IPO5

Displaying 1-6 of 6 [More >>](#)



In the minimized view, the sort arrow for the **Order Number** column overlaps the text.

4.7.2.1. Inpatient Medications Widget Data

The columns of information in the minimized view of the **Inpatient Medications** widget are:

- Order Number¹
- Drug Name
- Status
- Stop Date
- Site

¹ When there are multiple drugs with the same order number, CV maintains the grouping by order number when a column sort is applied in the widget.

Click **More >>** from the minimized view of the **Inpatient Medications** widget to open an expanded view of the widget. The columns of information in the expanded view are:

- Order Number
- Order Start Date
- Order Stop Date
- Drug Name
- Standardized Drug Name
- Status
- Ordering Health Care Provider (HCP)
- Ordering HCP Specialty
- Schedule
- Quantity
- Site

4.7.2.2. Viewing Inpatient Medication Details

Click the hyperlink in the **Drug Name** column of either view of the **Inpatient Medications** widget to open a separate window that displays detailed information about the medication.

4.7.2.3. Inpatient Medication Display and Filter Options

Display and filter options within the **Inpatient Medications** widget include:

- Click the column title to sort records according to data in that column. If a user sorts on a column that appears in both the minimized and expanded views, the sort is saved in the user profile and persists to the next user session. If a user sorts on a column that appears only in the expanded view of the widget, the next user session restores the default widget sort, or the last sort saved to the user profile. When there are multiple drugs with the same order number, CV maintains the grouping by order number when a column sort is applied in the widget
- Click **Column Settings**  in the widget toolbar to show or hide the columns within the widget. Check or uncheck the column names that appear in the pop-up box and click **Apply**
- Specify the date range for the records displayed in the widget using the **Quick Date Range Selector** or the **Start Date** and **End Date** calendars. If the information you expect does not appear in the widget display, use the **Start Date** and **End Date** filter options to expand the date range



CCP users have limited access to records, and can only specify dates within the range set by the VA staff user who created the patient assignment.

- Use the **Filter by Drug Name** dropdown to re-draw the widget to show only the records for the selected medication

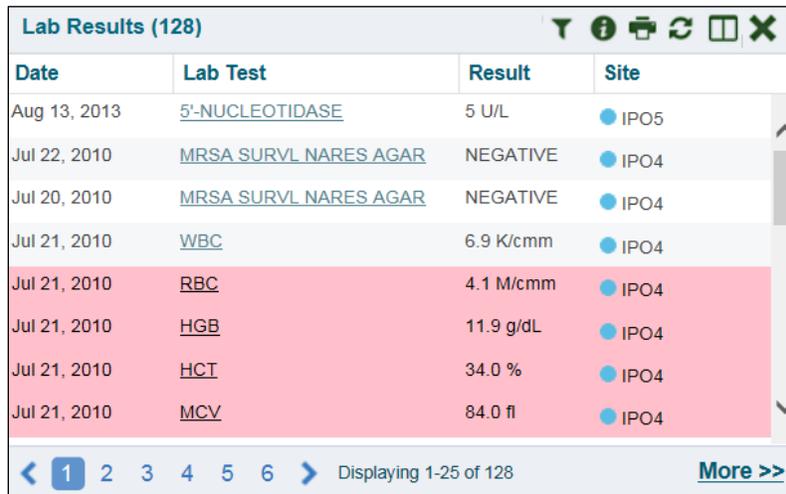
- Use the **Filter by Standardized Drug Name** dropdown to re-draw the widget to show only the records for the selected medication
- Use the **Filter by Ordering HCP Specialty** dropdown to re-draw the widget to show only the records for the ordering HCP

4.7.3. Lab Results

The  **Lab Results** widget (Figure 26) displays the patient’s lab result information, as well as skin test data and blood transfusion history, where available in the patient’s record. The information is displayed in reverse chronological order, by the date of the last lab results.

To open the widget, click and hold **Lab Results** in the widget tray, drag it to the desired location on the screen, and drop it.

Figure 26: Lab Results



Date	Lab Test	Result	Site
Aug 13, 2013	5'-NUCLEOTIDASE	5 U/L	IPO5
Jul 22, 2010	MRSA SURVL NARES AGAR	NEGATIVE	IPO4
Jul 20, 2010	MRSA SURVL NARES AGAR	NEGATIVE	IPO4
Jul 21, 2010	WBC	6.9 K/cmm	IPO4
Jul 21, 2010	RBC	4.1 M/cmm	IPO4
Jul 21, 2010	HGB	11.9 g/dL	IPO4
Jul 21, 2010	HCT	34.0 %	IPO4
Jul 21, 2010	MCV	84.0 fl	IPO4

1 2 3 4 5 6 > Displaying 1-25 of 128 [More >>](#)

4.7.3.1. Lab Results Widget Data

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

- Date
- Lab Test
- Result
- Site

Click **More >>** from the minimized view of the **Lab Results** widget to open an expanded view of the widget. The columns of information in the expanded view of the **Lab Results** widget are:

- Collection Date
- Order Number
- Status
- Ordering HCP
- Ordering HCP Specialty

- Lab Test
- Standardized Lab Test
- Type
- Specimen Source
- Result
- Interpretation
- Units
- Ref Range
- Site

4.7.3.2. Lab Results Display and Filter Options

Display and filter options within the **Lab Results** widget include:

- Click the column title to sort records according to data in that column. If a user sorts on a column that appears in both the minimized and expanded views, the sort is saved in the user profile and persists to the next user session. If a user sorts on a column that appears only in the expanded view of the widget, the next user session restores the default widget sort, or the last sort saved to the user profile
- Click **Column Settings**  in the widget toolbar to show or hide the columns within the widget. Check or uncheck the column names that appear in the pop-up box and click **Apply**
- Specify the date range for the records displayed in the widget using the **Quick Date Range Selector** or the **Start Date** and **End Date** calendars. If the information you expect does not appear in the widget display, use the **Start Date** and **End Date** filter options to expand the date range
- Use the **Filter by Lab Test** dropdown to re-draw the widget to show only the records for the selected test
- Use the **Filter by Standardized Lab Test** dropdown to re-draw the widget to show only the records for the selected test
- Use the **Filter by Type** dropdown to re-draw the widget to show only the records for the selected type
- Use **Graph View** to display multiple records of the same type in graph format. See [Section 4.7.3.6, Graph View](#) for more information.
- Use **Table View** to display multiple records of the same type in tabular format. See [Section 4.7.3.5, Table View](#) for more information.

4.7.3.3. Viewing Abnormal Results in the Lab Results Widget

CV highlights results whose values fall within a calculated reference range for abnormal in the minimized and expanded views of the widget.

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

4.7.3.4. Viewing Lab Results Details

Clicking a hyperlinked entry in the **Lab Test** column opens a separate window that displays the detailed test report.

4.7.3.5. Table View

There is an option to display multiple records of the same type in a table. By default, the **Show Table** link in the expanded view of the **Lab Results** widget is disabled until the user narrows the data selection, using display filters.

To view lab results in Table View:

1. Click **More >>** in the minimized view of the **Lab Results** widget to open expanded view
2. Select one entry from the **Filter by** dropdown (*except* for the **Filter by Type** option). This action enables the **Show Graph** and **Show Table** links

 The **Show Graph** and **Show Table** links are not enabled after selecting one lab type from the **Filter by Type** drop down box.

3. Click **Show Table**
4. A separate window opens, displaying the records of the type selected in the filter in a table

4.7.3.6. Graph View

There is an option to display multiple records of the same type in a graph. By default, the **Show Graph** link in the expanded view of the **Lab Results** widget is disabled until the user narrows the data selection, using display filters.

To view lab results in Graph View:

1. Click **More >>** in the minimized view of the **Lab Results** widget to open expanded view
2. Select an available filter from the **Filter by** dropdown (*except* for the **Filter by Type** option). This action enables the **Show Graph** and **Show Table** links

 The **Show Graph** and **Show Table** links are not enabled after selecting one lab type from the **Filter by Type** drop down box.

3. Click **Show Graph**
4. A separate window opens, displaying the records of the type selected in the filter in graph format

4.7.4. Problem List

The  **Problem List** widget ([Figure 27](#)) displays a list of the patient's health issues. The information is displayed in reverse chronological order, by the last modified date.

To open the widget, click and hold **Problems List** in the widget tray, drag it to the desired location on the screen, and drop it.

Figure 27: Problem List Widget

Problem List (14)					
ICD	Onset	Description	Updated	Status	Site
Z83.511		FAMILY HISTO...	Jun 05, 2017	ACTIVE	● IPO4
D86.0		SARCOIDOSIS...	Sep 08, 2016	ACTIVE	● IPO4
R69.		ILLNESS, UNS...	Feb 10, 2016	ACTIVE	● IPO4
724.1		Acute thoracic b...	Aug 13, 2013	ACTIVE	● IPO5
272.4		Hyperlipidemia (...	Aug 16, 2010	ACTIVE	● IPO4
530.81		Gastroesophaq...	Sep 03, 2009	ACTIVE	● IPO4
305.1		TOBACCO USE...	Sep 24, 2008	ACTIVE	● IPO4
790.93		Elevated Prostat...	Sep 18, 2008	ACTIVE	● IPO4
600.01		Hypertrophy (Be...	Nov 28, 2006	ACTIVE	● IPO4
412.	2003	Old Myocardial I...	Jan 30, 2006	ACTIVE	● IPO4
414.9		Coronary Artery...	Jan 30, 2006	ACTIVE	● IPO4
401.9		Hypertension (I...	Jan 30, 2006	ACTIVE	● IPO4
715.09		Osteoarthritis,...	Jan 30, 2006	ACTIVE	● IPO4
V15.2	Apr 12, 2005	Personal History...	May 10, 2005	ACTIVE	● IPO4

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

4.7.4.1. Problem List Widget Data

The columns of information in the minimized view of the **Problem List** widget are:

- International Classification of Diseases (ICD)
- Onset
- Description
- Updated
- Status
- Site

Click **More >>** in the minimized view to open expanded view. The columns of information in the expanded view of the widget are:

- ICD
- Onset
- Description
- Standardized Description
- Updated
- Severity
- Status
- Site

4.7.4.2. Viewing Problem List Details

Clicking a hyperlinked entry in the **Description** column in either the minimized or expanded views of the widget opens a separate window that displays a detailed report of the record.

4.7.4.3. Problem List Display and Filter Options

Display and filter options within the **Problem List** widget include:

- Click the column title to sort records according to data in that column. If a user sorts on a column that appears in both the minimized and expanded views, the sort is saved in the user profile and persists to the next user session. If a user sorts on a column that appears only in the expanded view of the widget, the next user session restores the default widget sort, or the last sort saved to the user profile
- Click **Column Settings**  in the widget toolbar to show or hide the columns within the widget. Check or uncheck the column names that appear in the pop-up box and click **Apply**
- Use the **Filter by Description** dropdown to re-draw the widget to show only the records for the selected problem
- Use the **Filter by Standardized Description** dropdown to re-draw the widget to show only the records for the selected problem
- Use the **Filter by Status** dropdown to re-draw the widget to show only the records with the selected status
- Specify the date range for the records displayed in the widget using the **Quick Date Range Selector** or the **Start Date** and **End Date** calendars. If the information you expect does not appear in the widget display, use the **Start Date** and **End Date** filter options to expand the date range

For more information about the general functionality of CV, and to see a list of all of the other widgets available in the application, please open the **Online Help** index within CV. If you need technical assistance, please see [Section 1.4, Getting Help](#).