Joint Legacy Viewer (JLV) 2.5.1 User Guide

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Revision History

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Artifact Rationale

Per the Veteran-focused Integrated Process (VIP) Guide, the User Guide is required to be completed prior to Critical Decision Point #2 (CD2), with the expectation that it 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 Joint Legacy Viewer (JLV) is a graphical user interface (GUI) that displays an integrated, read only, real-time view of Electronic Health Record Data (EHR) from the Department of Veterans Affairs (VA), the Department of Defense (DoD), and Health Information Exchange (HIE) systems, within a single user interface.

The JLV GUI retrieves and displays clinical data from a number of native data sources and systems into widgets corresponding to clinical data domains. JLV aggregates clinical data across departments in a simple to use, web-based interface, thus eliminating the need for VA and DoD clinicians to access separate/disparate viewers. Born from a joint DoD-VA venture known as JANUS, JLV was directed by the Secretary of Defense and Secretary of Veterans Affairs in early 2013 to further support interoperability between the two Departments.

JLV comprises a number of widgets that retrieve clinical data in real time from DoD and VA data sources, and displays the data in a unified chronological view. A user can create and personalize tabs, drag and drop widgets onto tabs, sort data in widget columns, set date filters, and see information provided by a widget in either Expanded or Detail views. Within each widget, color-coded icons indicate the data source: an orange square for data retrieved from a DoD source, a blue circle for data retrieved from a VA source, and a purple hexagon for HIE partner data. JLV is a centrally hosted, Java-based web application that consists of a number of components. It is managed as a single code baseline, deployed in separate DoD and VA environments.

1.1 Purpose

The purpose of the User Guide is to familiarize VA users with the important features and navigational elements of the JLV GUI.

1.2 Document Orientation

1.2.1 Organization of the Manual

The table below briefly describes the major sections of the JLV User Guide.

Table 1: Major Sections and Descriptions

Major Section Name	Description
System Summary	Provides a general description of the system and the purpose for which it is intended.
Getting Started	Describes VA user log on to the JLV user interface, JLV user profile information/configuration settings, user interface theme settings, and exiting the JLV user Interface.

Major Section Name	Description
Using the Software	Details functions and provides example figures for the JLV system, such as: • Accessing Patient Data • Using Widgets • Context Management • User Restricted Access (break-the-glass) • Using the Report Builder • Working with the Accessible Interface • Patient Portal Data Domains
Troubleshooting	Provides troubleshooting information for users of the JLV web application, including error messages and suggested resolution steps.

1.2.1.1 Intended Users

This document is intended for the VA JLV users supporting the:

- Veterans Health Administration (VHA).
- Veterans Benefits Administration (VBA).

Please refer to Section 2.3, User Types for more information regarding user types and access.

1.2.2 Assumptions

This guide was written with the following assumed experience/skills of the audience:

- User has been provided the VA credentials including PIV (Personal Identification Verification) card and authorization to access the JLV system.
- User is using JLV GUI to support VHA and/or VBA workflows.

1.2.3 Coordination

JLV is a centralized enterprise application and does not require deployments to any local facilities. The deployment occurs at the Austin Information Technology Center (AITC) and Philadelphia Information Technology Center (PITC) and requires no site preparation.

Post-deployment hardware, software, and system support roles and responsibilities are defined in the Project Operations and Maintenance (O&M) Plan and the System Architecture Document.

JLV is a read only view of electronic health records, coordinated with the DoD, to provide health providers an integrated view of participating government sources of Veteran and Active Military health information.

1.2.4 Disclaimers

This software was developed at the VA by employees of the Federal Government in the course of their official duties. Pursuant to title 17 Section 105 of the United States Code this software is not subject to copyright protection and is in the public domain. VA assumes no responsibility whatsoever for its use by other parties, and makes no guarantees, expressed or implied, about its

quality, reliability, or any other characteristic. We would appreciate acknowledgement if the software is used. This software can be redistributed and/or modified freely if any derivative works bear some notice that they are derived from it, and any modified versions bear some notice that they have been modified.

1.2.4.1 Documentation Disclaimer

The appearance of external hyperlink references, if any, in this manual does not constitute endorsement by the VA or the information, products, or services contained therein. The VA does not exercise any editorial control over the information you may find at these external locations. Such links are provided and are consistent with the stated purpose of the VA.

1.2.5 Documentation Conventions

This document is designed for both online and hardcopy consumption.

- Cross References are underlined and provide a hyperlink to other sections in this guide.
- The conventions used in this document for emphasis are **bold** and *italic* text.

1.2.6 References and Resources

The documents used as references to prepare this User Guide are listed in Table 2.

Table 2: References and Resources

Document Name	Document Link	Date
JLV 2.5.1 System Design Document (SDD)	CLIN 0003AA JLV 2.5.1 System Design Document	November 2016
JLV 2.5.0.0 SDD	CLIN 0002AF JLV 2.5.0 System Design Document	September 2016
JLV 2.4.0.1 SDD	CLIN 0002AF JLV 2.4.0 System Design Document	July 2016

1.3 National Service Desk and Organizational Contacts

Refer to Section 3, Getting Started, prior to contacting the National Service Desk (NSD) for support.

If you are an authorized user, are having trouble logging in to JLV, or are experiencing other on-screen issues, please use contact the NSD via the telephone number unique to your agency for assistance.

VA users must contact the VA NSD, and DoD users must contact the DHA Global Service Center.

Table 3: Service Desk Contact Information

Service Desk	Contact Information	
VA NSD	Phone: 888-596-4357	E-mail: NSDTuscaloosaUSD@va.gov
DHA Global Service Center	Phone: 800-600-9332	E-mail: dhagsc@mail.mil

2 System Summary

JLV is a patient-centric, presentation system that pulls information from disparate health care systems in real time, for viewing in a web browser. The web application provides the ability to view specific clinical data within patients' longitudinal health records, stored in EHR systems available to VA and the DoD.

The JLV GUI is a front-end web application designed to run in a web browser. JLV is optimized for use with the standard released VA Internet Explorer (currently version 11.0). Other web browsers may function but are not certified for support.

The major JLV GUI functions include:

- Accessing patient data
- Using widgets
- Context management
- User restricted access (break the glass)
- Using the Report Builder
- Working with the accessible interface
- Patient Portal data domains

NOTE: A description of the system framework model is described in the next section.

2.1 System Configuration

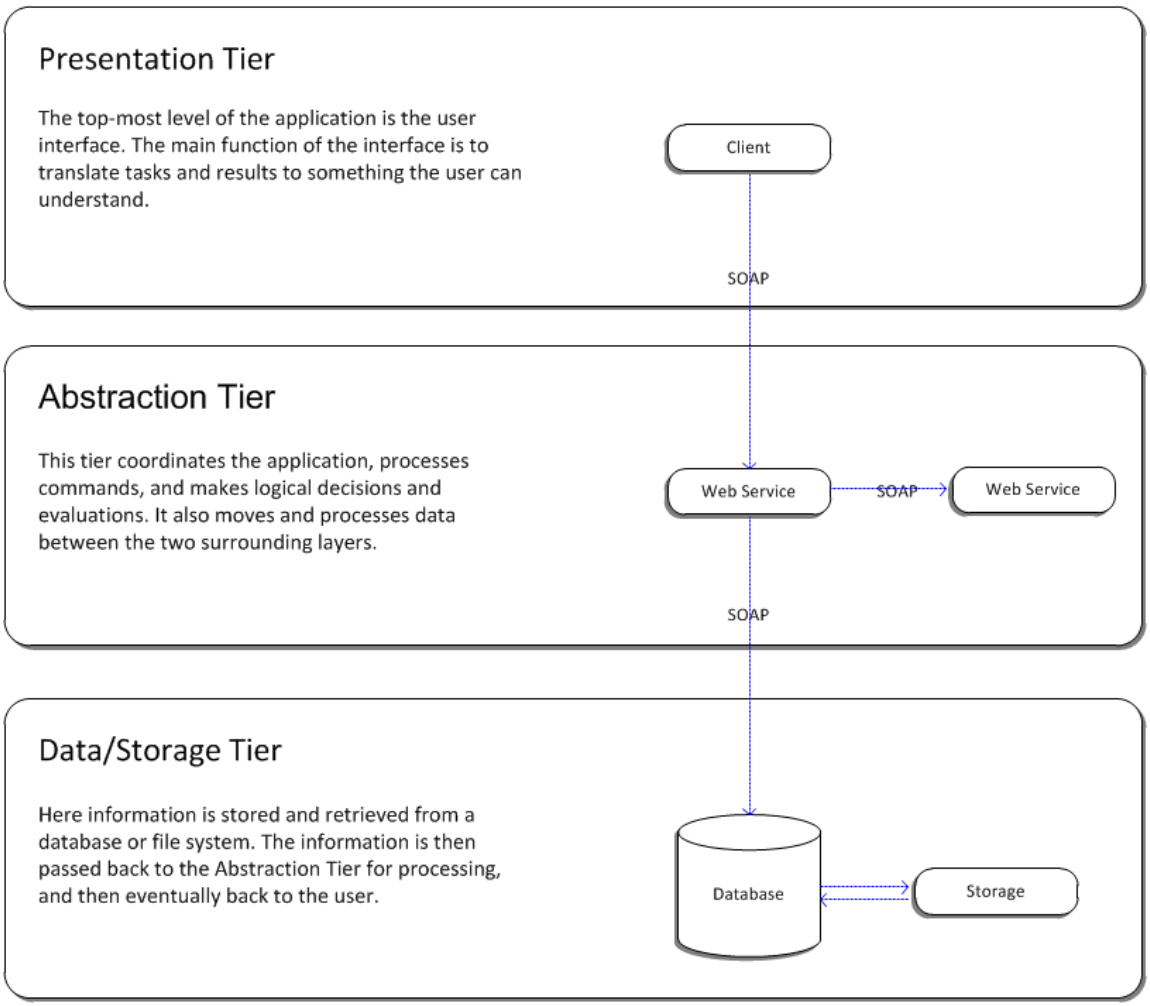
The following sections describe the framework model, tiers, and main components of the JLV system, including the services and messaging protocols that communicate within and between tiers in the system. Enterprise JLV is a read only web application with no clinical data input or output devices.

Refer to the JLV 2.5.1 Deployment, Installation, Backout, and Rollback Guide (DIBR) for a complete overview of JLV components and the production environments in which the components reside.

2.1.1 System Framework Model

The JLV framework is an n-tier (three-tier) hierarchical model comprising the presentation, abstraction, and data/storage tiers as shown in the figure below.

Figure 1: N-Tier Architecture Structure Sample



2.1.1.1 Architecture Tiers

Each element in the hierarchy shown in the figure above has a specific set of functions and services that it offers and a specific role to play in each tier of the design.

2.1.1.2 Presentation Tier

The presentation tier, or client tier, is the top-most level of the n-tier architecture and is also considered the user interface. The main function of the interface is to translate tasks and results for the client to understand. The JLV provides the ability to view specific clinical data stored in any electronic medical record systems available to the abstraction tier.

VA users must present their Personal Identification Verification (PIV) identification and VistA system credentials before gaining access to JLV. Based on the PIV identification, jMeadows retrieves the user's profile information from the JLV database. User default host location, user custom widget layout, and other user data are returned.

Once users launch the presentation layer, the user is prompted to enter their credentials. JLV sends these credentials to jMeadows which then authenticates the users to their host Electronic

Health Record (EHR) system, granting access to JLV. User authentication takes place before JLV interfaces with jMeadows.

2.1.1.3 Abstraction Tier

The abstraction tier, or application tier, is the tier that the presentation tier and the data/storage tier use to communicate with each other. The abstraction tier moves and processes data between the presentation tier and the data/storage tier. The abstraction tier coordinates the application, processes commands, and makes logical decisions and evaluations. The process of abstracting the data sources from the application takes place here.

2.1.1.4 Data/Storage Tier

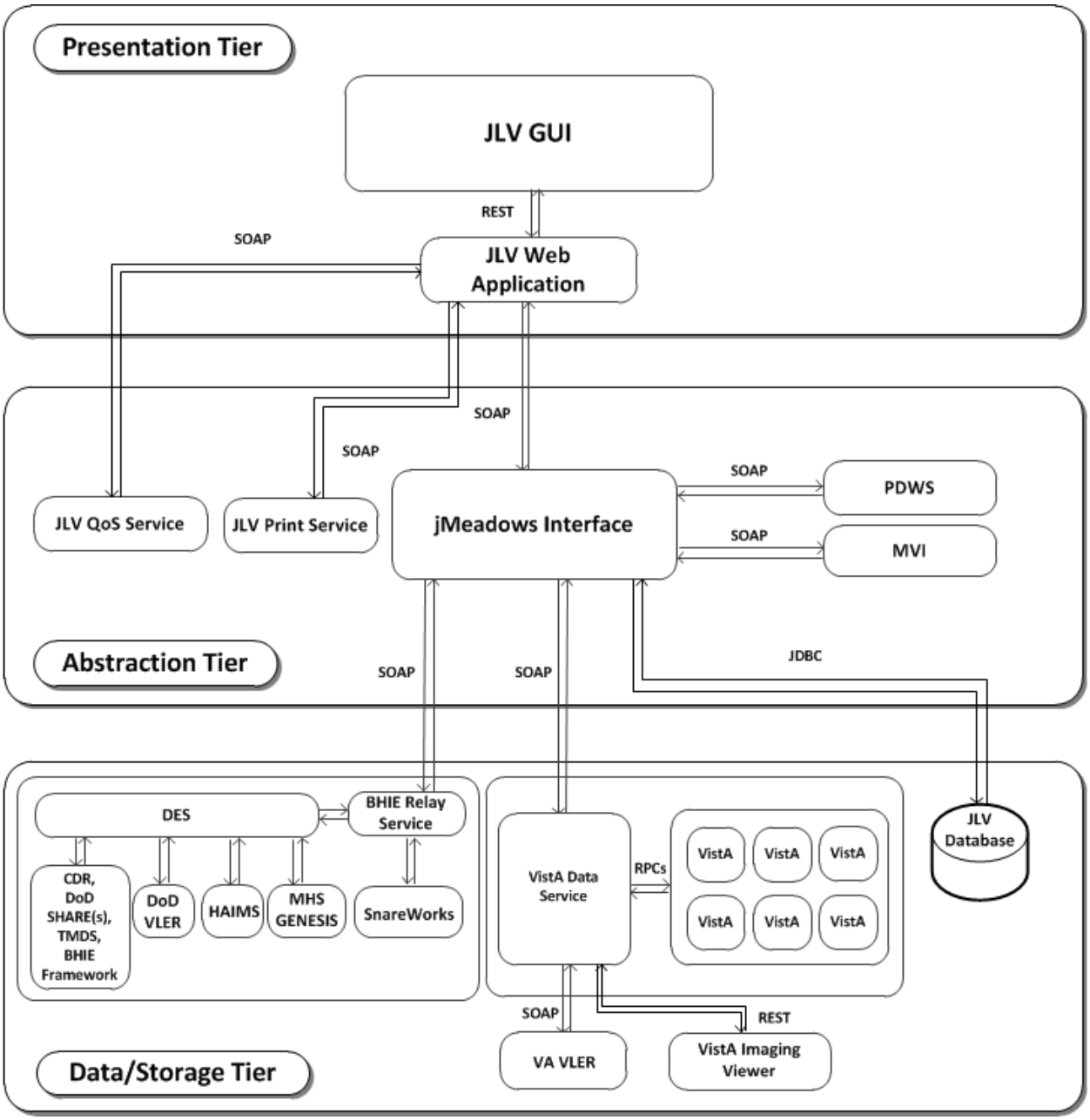
The data/storage tier is where the source application's data is stored and from where data is retrieved.

A detailed matrix of the data source(s) that populate specific clinical domains in the JLV web application is provided in the JLV 2.5.1 System Design Document.

2.1.2 JLV System Components and Tiers Diagram

This section provides a diagram showing the components of the JLV application and their corresponding tier as described previously.

Figure 2: JLV System Components and Tiers



2.1.3 System Specifications

The following table describes the server configuration for JLV Enterprise Production Infrastructure hosted at the AITC.

Table 4: AITC JLV Enterprise Server Configuration

Server Type	Server Specifications
JLV Web Application Servers	Four (4) servers each with four (4) processors @2.26GHz and 16 Gigabyte (GB) RAM

Server Type	Server Specifications
Veterans Health Information Systems and Technology Architecture (VistA) Data Service Servers	Four (4) servers each with four (4) processors @2.26GHz and 16 GB RAM
jMeadows Service Servers	Four (4) servers each with four (4) processors @2.26GHz and 16 GB RAM
Database Servers	Two (2) servers each with four (4) processors @2.26GHz and 16 GB RAM

The following table describes the server configuration for JLV Enterprise Production Infrastructure hosted at the PITC.

Table 5: PITC JLV Enterprise Server Configuration

Server Type	Server Specifications
JLV Web Application Servers	Four (4) servers each with four (4) processors @2.26GHz and 16 GB RAM
VistA Data Service Servers	Four (4) servers each with four (4) processors @2.26GHz and 16 GB RAM
jMeadows Service Servers	Four (4) servers each with four (4) processors @2.26GHz and 16 GB RAM
Database Servers	Two (2) servers each with four (4) processors @2.26GHz and 16 GB RAM

2.2 Data Flows

Figure 2: JLV System Components and Tiers depicts the data flows in the JLV system. All patient data flows are read only from the corresponding sources.

2.3 User Types

The following table describes authorized JLV users.

Table 6: JLV User Profiles

User	Description and Responsibilities
DoD Clinician	The DoD clinicians access the patient Electronic Health Records (EHRs).
Veterans Health Administration (VHA)	The VA clinicians and administrative staff who access the patient EHRs to assist in providing health care services.
Veterans Benefits Administration (VBA)	The VA administrative staff that access patient EHR to assist in Veterans benefits administration processes.

Please refer to Section 3.1, Logging On for a description of the VA users and their access to JLV data. Also, refer to the User Restricted Access section of this document for a description of VHA and VBA user access levels to DoD-only patient data and/or DoD sensitive patient data.

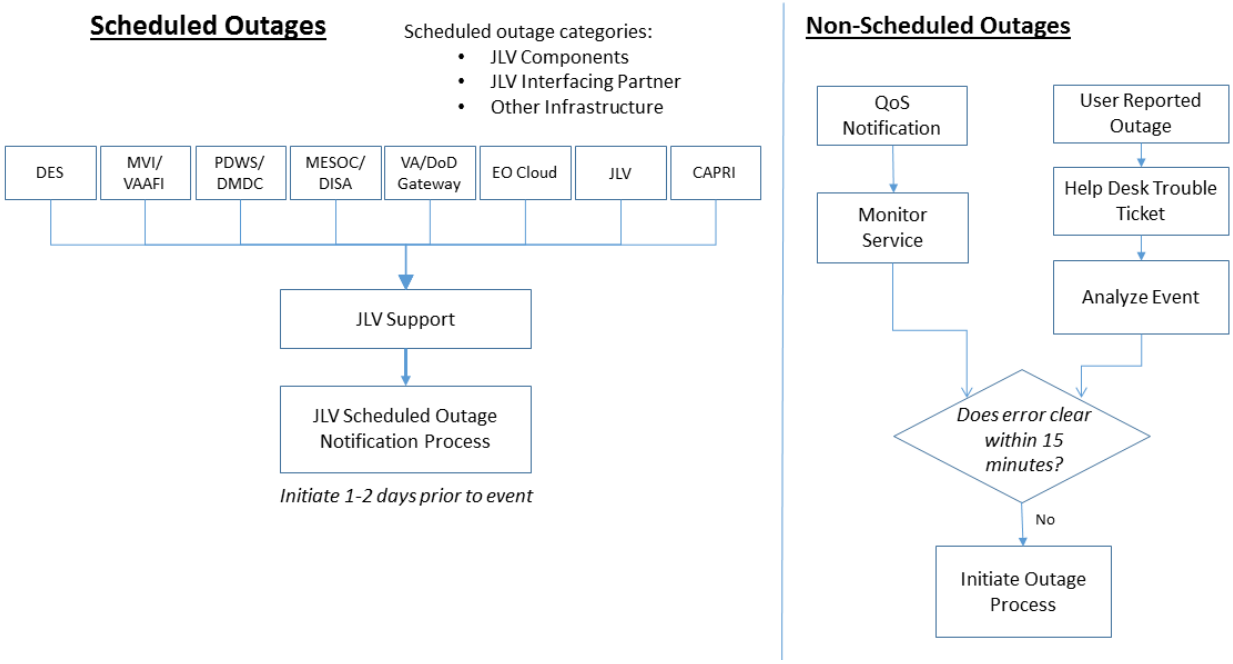
2.4 Continuity of Operation

The operation of the JLV components hosted in VA environments is administered as a service by the VA AITC and PITC data centers. These organizations maintain Continuity of Operation team linkages and documentation.

Refer to CLIN 0003AK JLV 2.5.1 Production Operations Manual for additional information about possible service interruptions and other system errors, support operations, and scheduled maintenance.

The figure below is an overview of this process:

Figure 3: Scheduled Downtime and Non-Scheduled Outage



3 Getting Started

Users can view patient records through JLV, which provides authorized DoD and VA users with a combined view of patient record data via a GUI. The common data view arranges similar data from each contributing health information system and displays it chronologically on a single screen, eliminating the need to access separate applications to obtain complete patient information. VA, DoD, and VA Virtual Lifetime Electronic Record (VLER), as well as available partner patient data is collated and combined onto single screens.

3.1 Logging On

Authorized, registered users within the VA and DoD are provided access information to directly log on to JLV. If you have not received credentials to access JLV, you must first request access through the appropriate service lead or facility.

JLV authenticates all VA users against an authorized, registered list of users in combination with the user's PIV card and credentials. During log in, first-time JLV users will be prompted to enter agency, site, and user settings. This data is used to create your JLV user profile and will be utilized during future login sessions.

Refer to Section 5, Troubleshooting for more tips for logging in.

3.1.1 VHA User Login

The following steps apply to VHA users accessing JLV through a Uniform Resource Locator (URL). If you have not received credentials to access JLV, you must first request access through the appropriate VA service lead or reference the VA Enterprise Access Management website for more detail.

To log into JLV:

1. Insert your PIV card into your computer or card reader.
2. From your Internet browser, enter the URL for the JLV web application provided in your site access granted notification letter sent via email.
3. When prompted, select your certificate that is not expired and specifies *Issued by: Veterans Affairs CA B1*.
4. When prompted, enter your PIV Personal Identification Number (PIN).
5. Click **I Accept** after viewing the important user consent information regarding accessing a Government information system.
6. If desired, check the **Accessibility Mode** option in the top-right corner of the pane to open JLV in Accessible theme. Refer to Section 4.8, Setting up the JLV Web Application for Accessibility for more information.
7. Enter log in credentials:
    a. Enter your Computerized Patient Record System (CPRS) VistA Access Code.
    b. Enter your VistA Verify Code.
    c. From the Agency field, select **VA**.
    d. From the Site field, select your VA Medical Center or your regional Health Care System.
8. Click **Login**.

JLV will display embedded help and instructions for each of the login fields wherever possible. JLV will also display a 'Need Help?' link if any Smart Card or Access Denied errors occur.

NOTE: The Security Log-in processes and standards are continually evolving within the VA including the recent requirement for PIV card only systems access within the VA network. Users who are not authorized to access JLV or do not have required credentials will see the *Access denied* message. Access to JLV is limited to authorized users and is configured by system administrators. If you believe you have received an

access denied message in error, please contact the VA National Service Desk (1-888-596-4357) or send an e-mail to NSDTuscaloosaUSD@va.gov.

During future log in attempts, the lower-left corner of the JLV Login page will display your last successful login and last unsuccessful login attempt, which includes the date, local time, and the Internet protocol (IP) address from which access or attempted access was made.

NOTE: The Edit Profile link is available from the Login page to make JLV configuration options available to users before logging in. Refer to Section 3.2.2, User Profile and On-screen Configuration Options for more information.

NOTE: When access to patients is restricted for a VHA VA user, once the user logs in JLV will immediately display a list of restricted patients in the Patient List window. VHA users will only be able to select a patient from the list of pre-populated patients in the Patient List window. The pre-populated list represents the only patients the VHA user is authorized to view. JLV will also replace the Patient Search link on the portal with a link to the restricted Patient List.

3.1.2 VBA User Login

The following instructions apply to VBA users accessing JLV through a URL only. If you have not received credentials to access JLV, you must first request access through the VA Enterprise Access Management website.

To log into JLV:

1. Insert your PIV card into your computer or card reader.
2. From your Internet browser, enter the URL for the JLV web application provided in your site access granted notification letter sent via email.
3. When prompted, select your certificate that is not expired and specifies *Issued by: Veterans Affairs CA B1*.
4. When prompted, enter your PIV PIN.
5. Click **I Accept** after viewing the important user consent information regarding accessing a Government information system.
6. If desired, check the **Accessibility Mode** option in the top-right corner of the pane to open JLV in Accessible theme. Refer to Section 4.8, Setting up the JLV Web Application for Accessibility for more information.
7. Enter log in credentials:
    a. Enter your Compensation and Pension Record Interchange (CAPRI) Access Code.
    b. Enter your CAPRI Verify Code.
    c. From the Agency field, select **VA**.
    d. From the Site field, select **Veterans Benefits Administration**.

8. Click **Login**.

NOTE: Users who are not authorized to access JLV will see the *Access denied* message. Access to JLV is limited to authorized users and is configured by system administrators. If you believe you have received an access denied message in error, please contact the VA National Service Desk (1-888-596-4357) or send an email to NSDTuscaloosaUSD@va.gov.

During future log in attempts, the lower-left corner of the JLV Login page will display your last successful login and last unsuccessful login attempt, which includes the date, local time, and the internet protocol (IP) address from which access or attempted access was made.

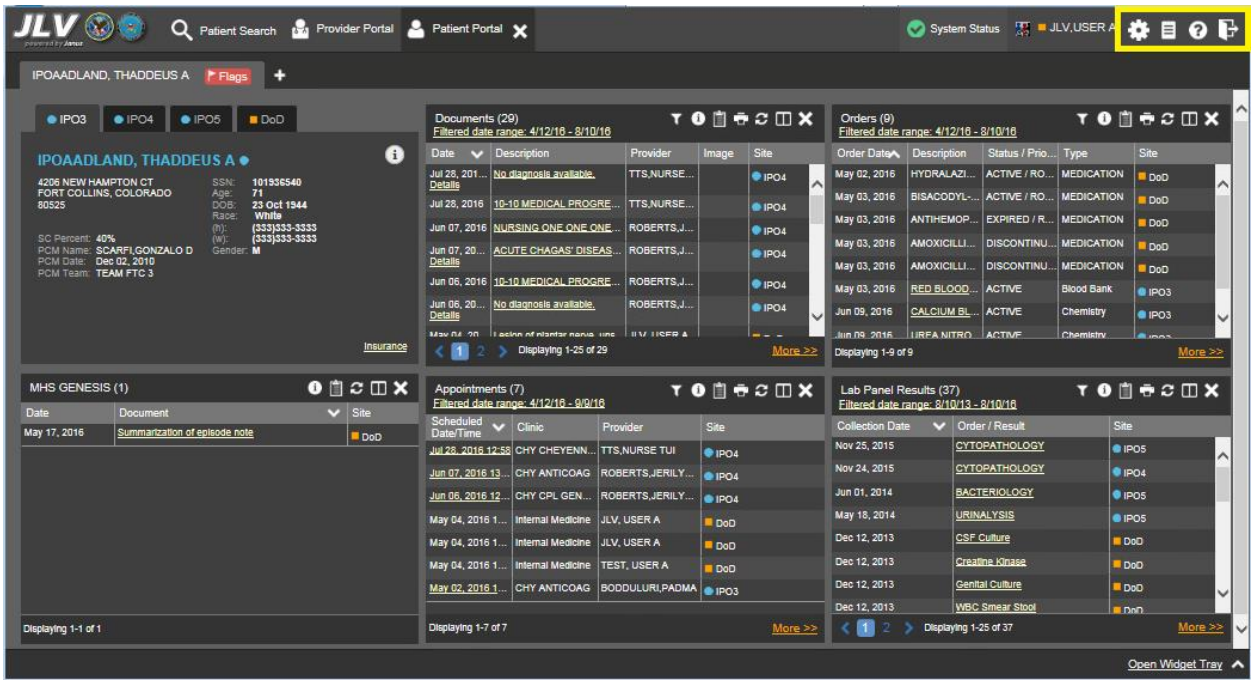
NOTE: The Edit Profile link is available from the Login page to make JLV configuration options available to users before logging in.

3.2 System Menu

Each JLV portal contains icons (highlighted in the top-right corner of the following figure*)* that enable a user quick access to the following:

- **Configure your user profile.** Click the **cog wheel** in the top-right corner of either Portal page to configure user settings, including the onscreen theme. Refer to Section 3.2.2, User Profile and On-screen Configuration Options.
- **Create reports with Report Builder.** Click **Report Builder** in the top-right corner of either Portal page to create custom reports. Refer to Section 4.5, Using the Report Builder.
- **Access online help.** Click **Help** in the top-right corner of either Portal page to open web-based online help.
- **Log out of JLV.** Click **Logout** to terminate your JLV session. Refer to Section 3.4, Exit System.

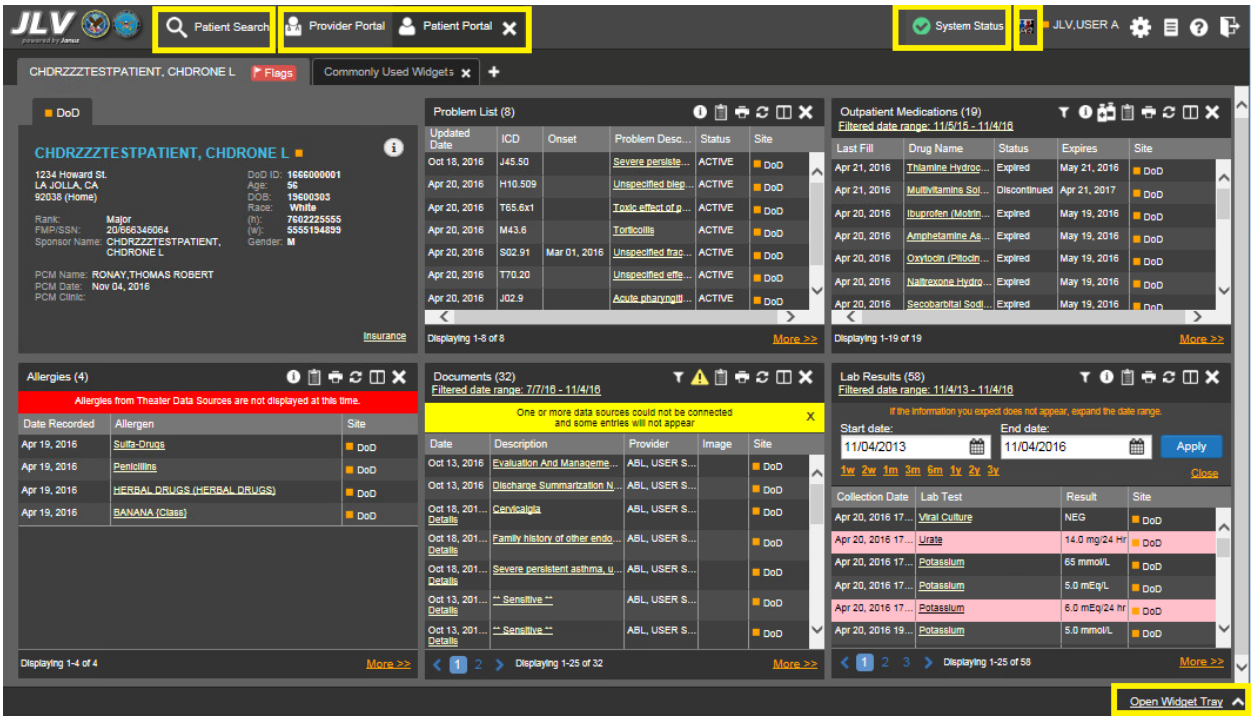
Figure 4: JLV Portal Tools



A user can also perform the following from the portal page (highlighted in the Figure 5):

- Perform a **Patient Search**. Refer to Section 4.1, Accessing Patient Data.
- Click to switch between **Patient Portal** and **Provider Portal**
- View system status. Refer to Section 3.2.1, Viewing System Status.
- View Context Management. Refer to Section 4.3, Context Management.
- Open the widget tray. Refer to Section 4.2.1, Accessing and Opening Widgets.

Figure 5: More JLV System Functions



3.2.1 Viewing System Status

System status updates are received from JLV's QoS Service (also referred to as the health monitor), which monitors the services that JLV uses to connect to DoD and VA data sources. Monitored services include: Master Veteran Index (MVI), Patient Discovery Web Service (PDWS), Relay Service, VistA Data Service, and jMeadows Data Service.

Two areas within the JLV web application display system status:

1. Login page below the user credential fields.
2. Portal page as shown in Figure 6.

Once logged in, a user can hover over the System Status field to view additional information, if any, and a phone number and e-mail address for the Help Desk. Possible status messages include:

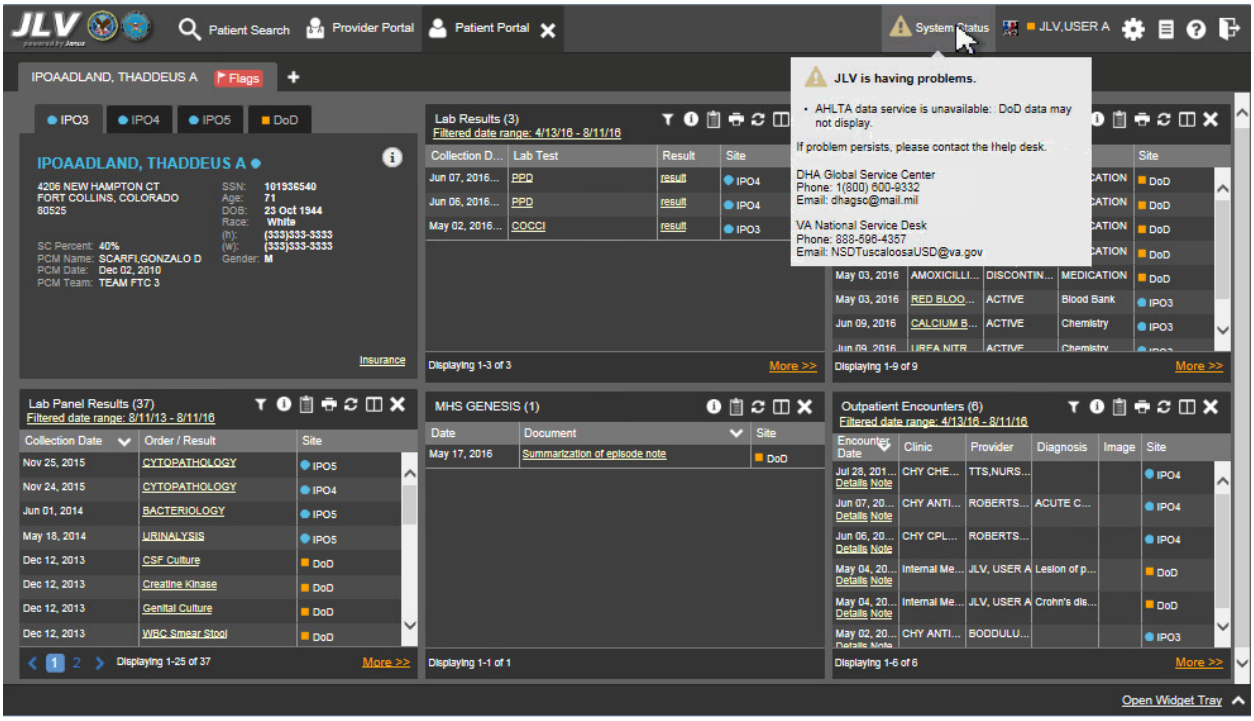
- When all monitored systems and services are online and connected, a green icon appears next to status *JLV data sources are available.*
- When one or more monitored systems or services are offline or unavailable, a yellow warning appears next to the message, *JLV is having problems.* Notification of unavailable systems persisting longer than ten (10) minutes should be reported to VA National Service Desk (refer to Section 1.2.3, National Service Desk and Organizational Contacts).
- When JLV's QoS service is unable to retrieve system status information, a red icon appears next to the message, *System status is unavailable.* This is not an indicator that data sources are unavailable to JLV. One possible cause of this status is that the

jMeadows Data Service is unavailable or an internal jMeadows Data Service error has occurred. Users may not be able to log into JLV or view patient data until the jMeadows connection is restored.

NOTE: JLV also provides interface status for each clinical domain and can be viewed through the widget's toolbar. Refer to Section 4.7.4, Viewing Interface Status for Clinical Domains for more information.

The following screen shows an example of hover text with system status information.

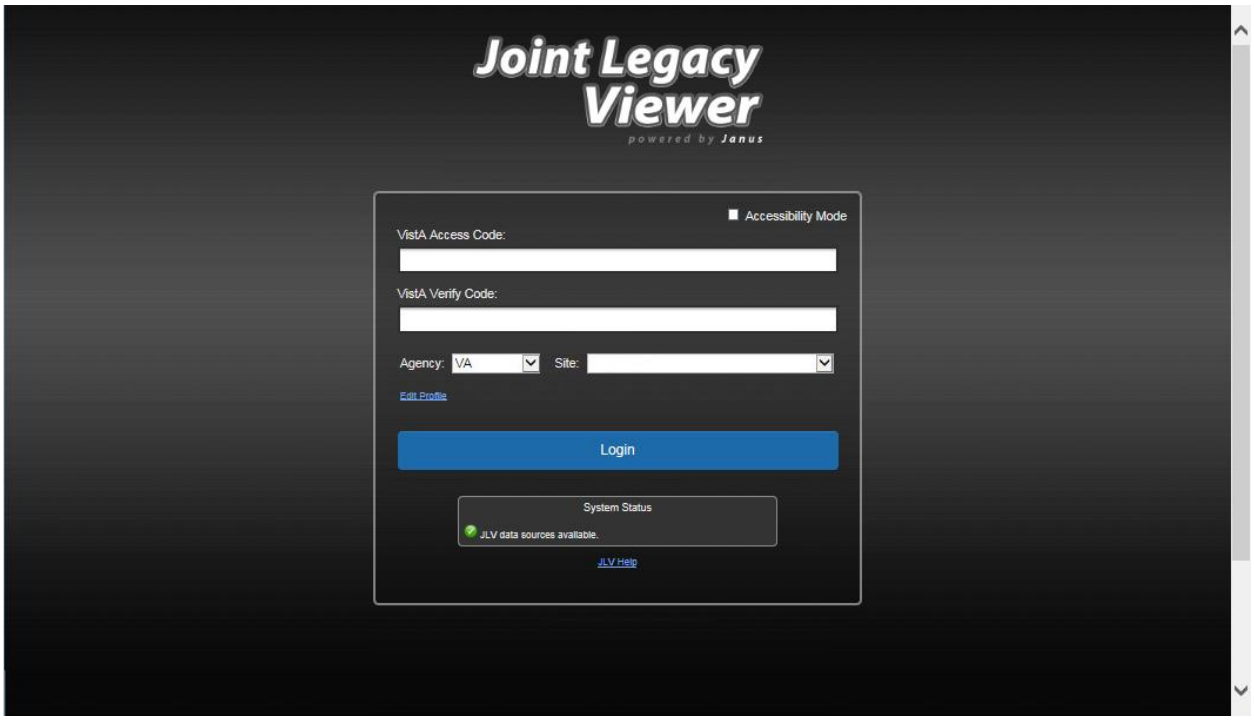
Figure 6: Sample JLV Service Warning



3.2.2 User Profile and On-screen Configuration Options

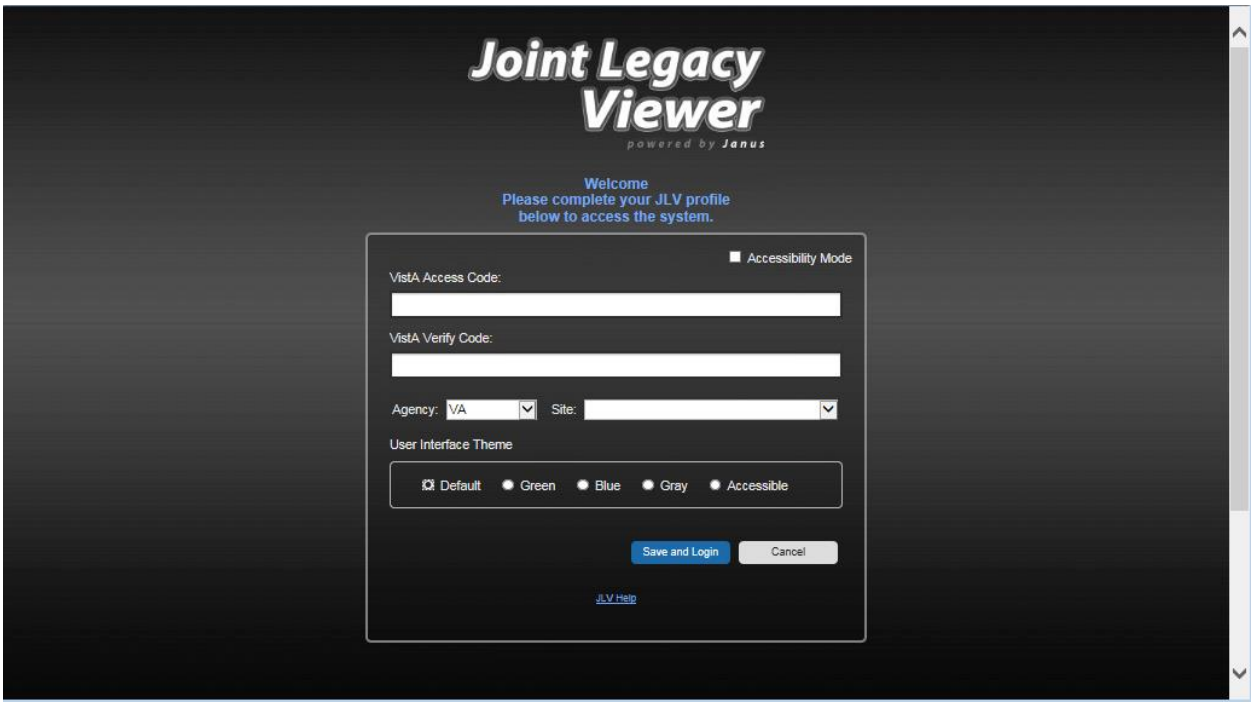
Figure 7 contains the Edit Profile link on the JLV Login page. Click this link to access User Profile fields in addition to on-screen configuration settings shown in Figure 8.

Figure 7: Edit Profile Link within Login Page Fields



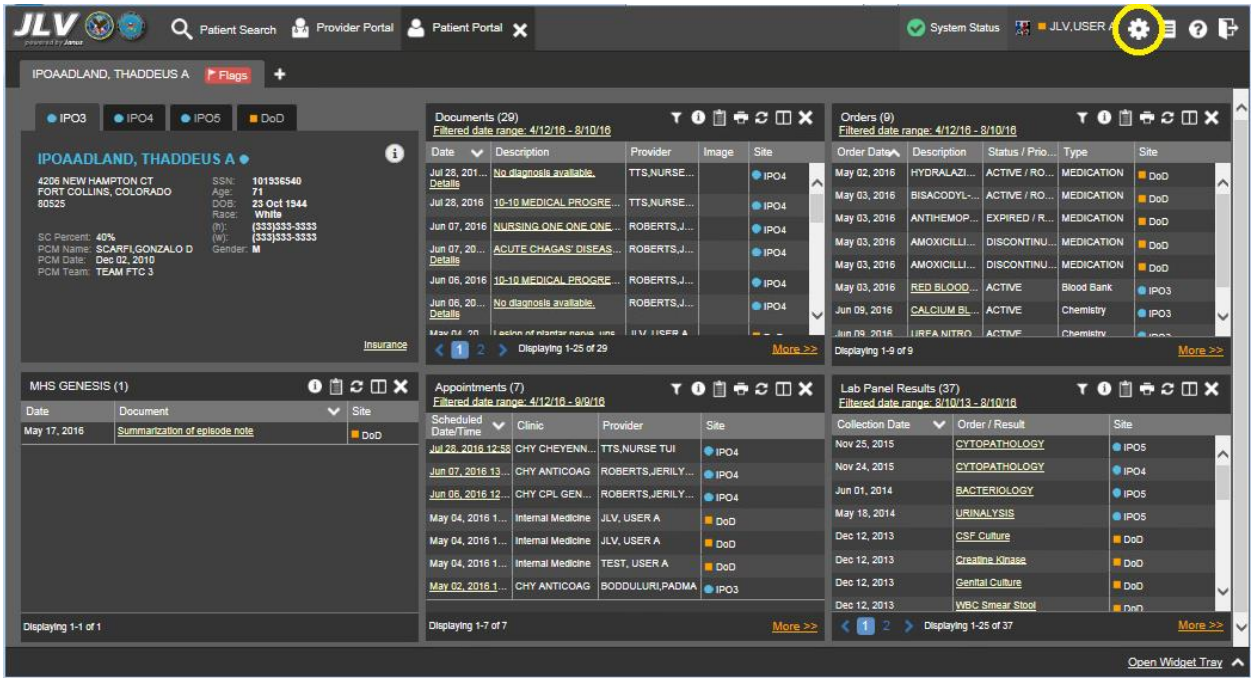
The following figure displays the configuration options available for a VA user. Options selected here will be persisted to subsequent user sessions after clicking **Save and Login**.

Figure 8: Edit Profile Options



After logging in, a user can access the user profile settings by clicking the **cog wheel** located in the top-right corner of the portal page.

Figure 9: Cog Wheel Icon on the Portal Page



3.2.3 Setting User Interface Theme

Selecting the **User Interface Theme** setting in the user profile settings allows you to pick the font color and foreground/background colors of the JLV GUI, including widgets, toolbars, and dialog boxes. The color themes are Default, Green, Blue, Gray, and Accessible. For comparison, the next four figures present the same test patient data shown with the different User Interface Theme options available in JLV. Unless noted, the on-screen examples provided in this document are the Default User Interface Theme.

The User Interface Theme setting is saved in your user profile and will be seen in all subsequent user sessions. After logging in, you can also set the User Interface Theme by clicking the **cog wheel** from the top-right corner of the portal page shown on the previous figure.

NOTE: The Accessible Theme includes larger fonts, enhanced tab and keystroke functionality, and screen reader compatibility to support Federal accessibility requirements and Section 508 compliance. Refer to Section 4.8, Setting up the JLV Web Application for Accessibility, for more information.

Figure 10: Default User Interface Theme

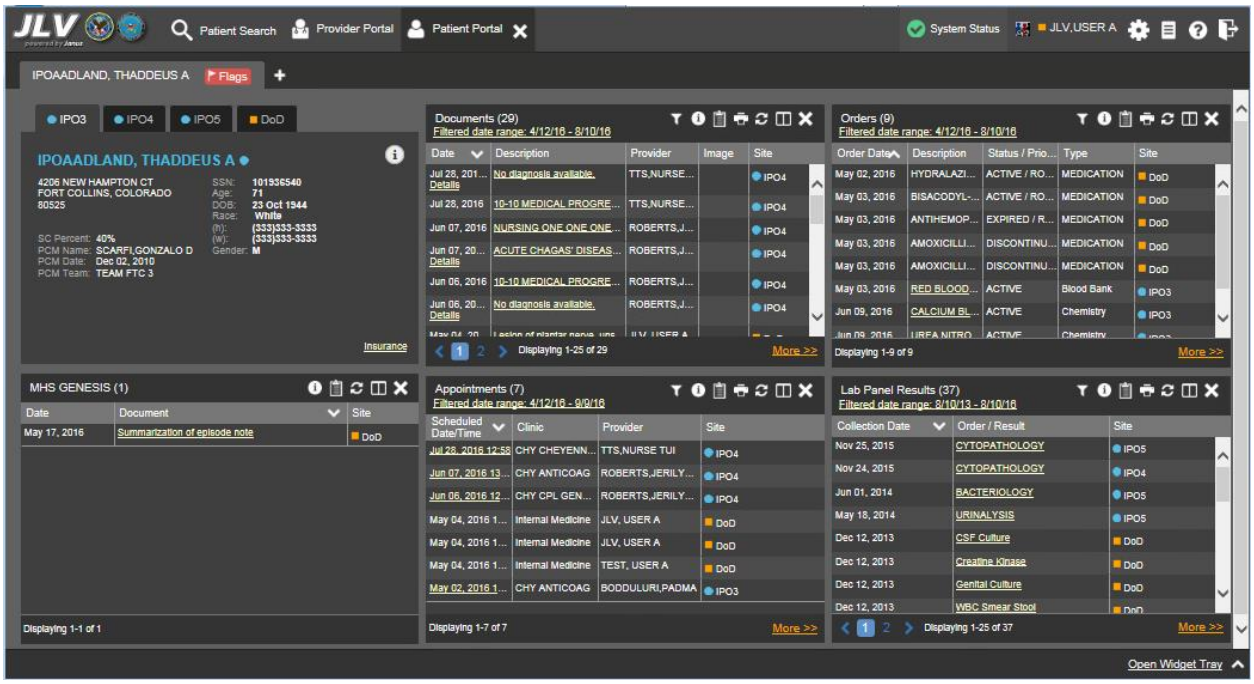


Figure 11: Green User Interface Theme

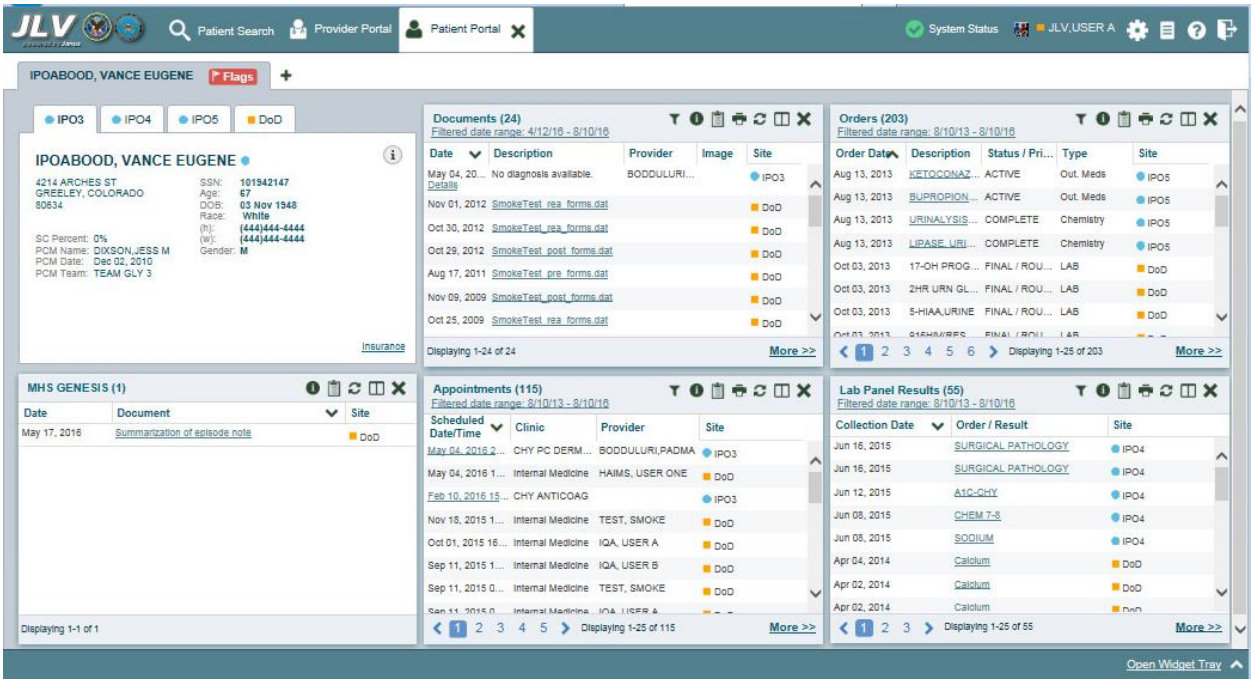


Figure 12: Blue User Interface Theme

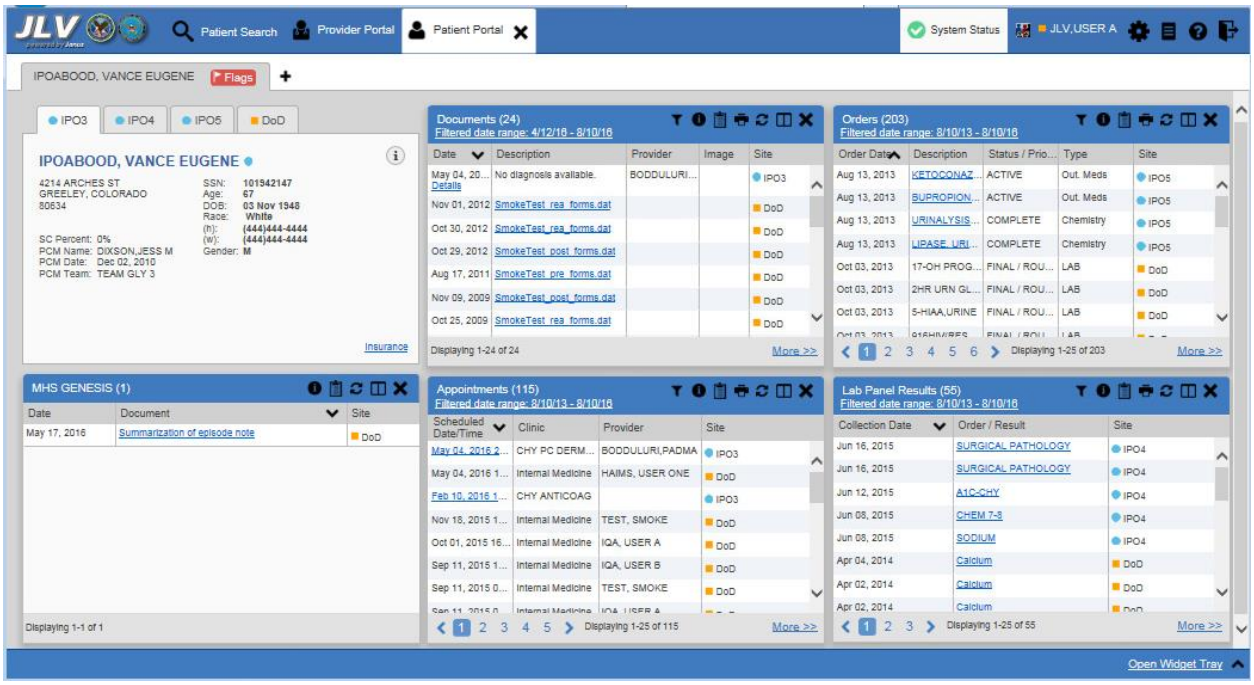


Figure 13: Gray User Interface Theme

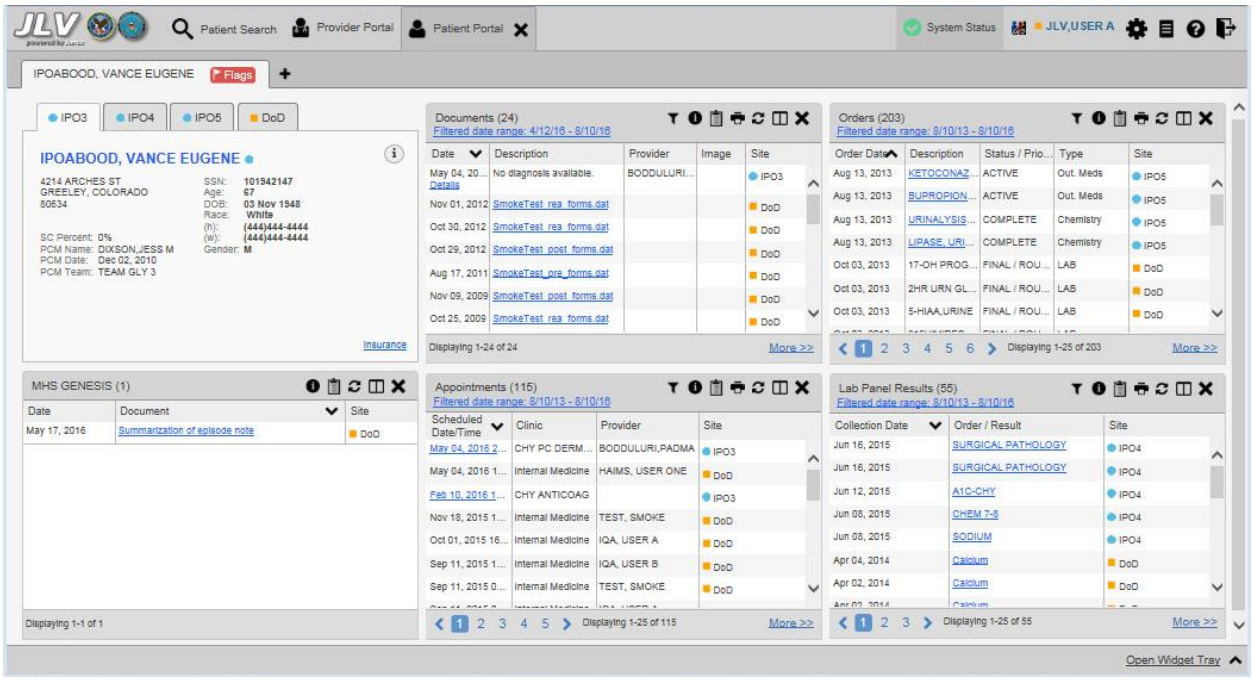
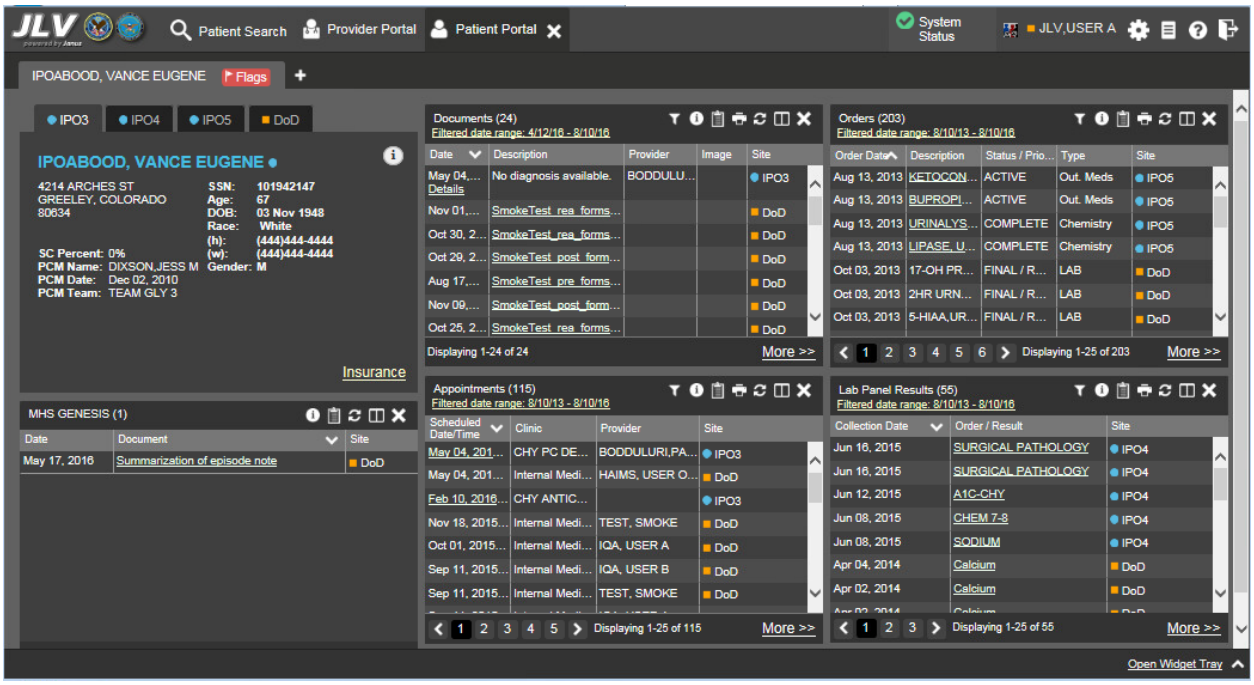


Figure 14: Accessible User Interface Theme



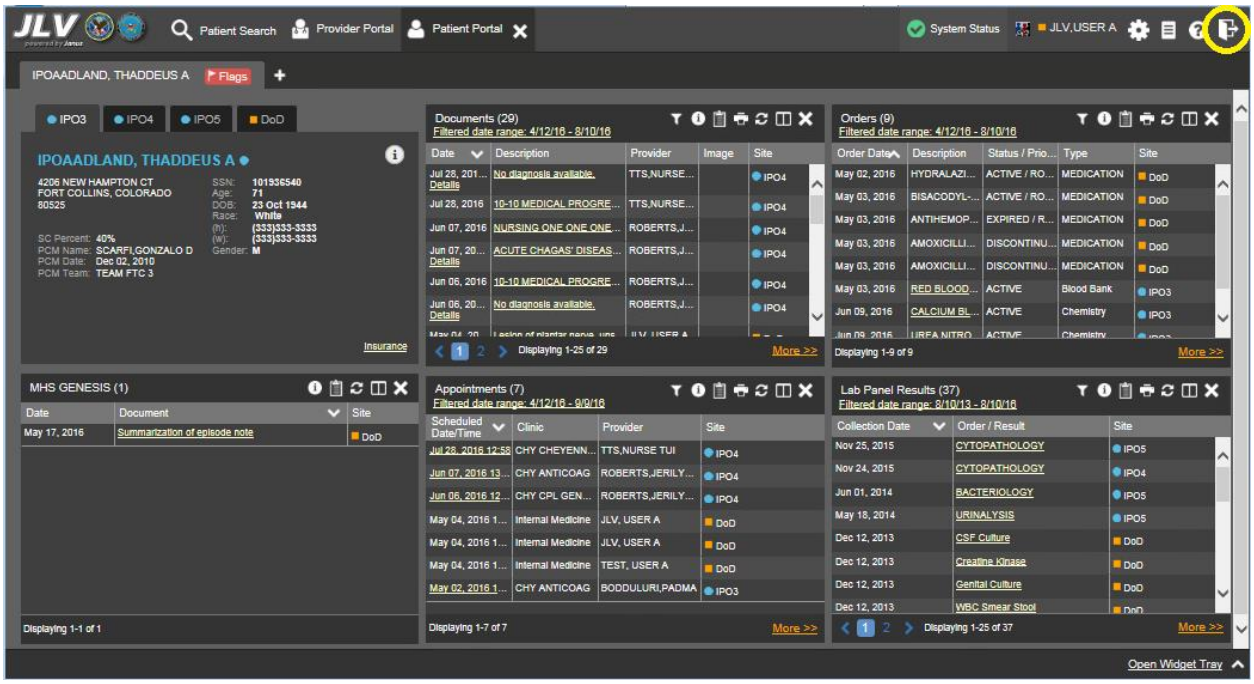
3.3 Changing User ID and Password

JLV authenticates all VA users against an authorized, registered list of VHA/VBA users in combination with the user's PIV card and VistA credentials. VistA access code and VistA verify code changes are not performed in JLV. VHA users must change their verify code in CPRS. VBA users must change their verify code in CAPRI.

3.4 Exit System

You may intentionally log off and end a JLV user session by clicking **Logout** at any time, as shown in the following figure. If you fail to log off on your own, your session will terminate automatically after five (5) minutes of inactivity. Automatic termination of a user session will not clear the screen; however, your user session will be terminated.

Figure 15: JLV Logout Icon



3.5 Caveats and Exceptions

No caveats or exceptions have been identified.

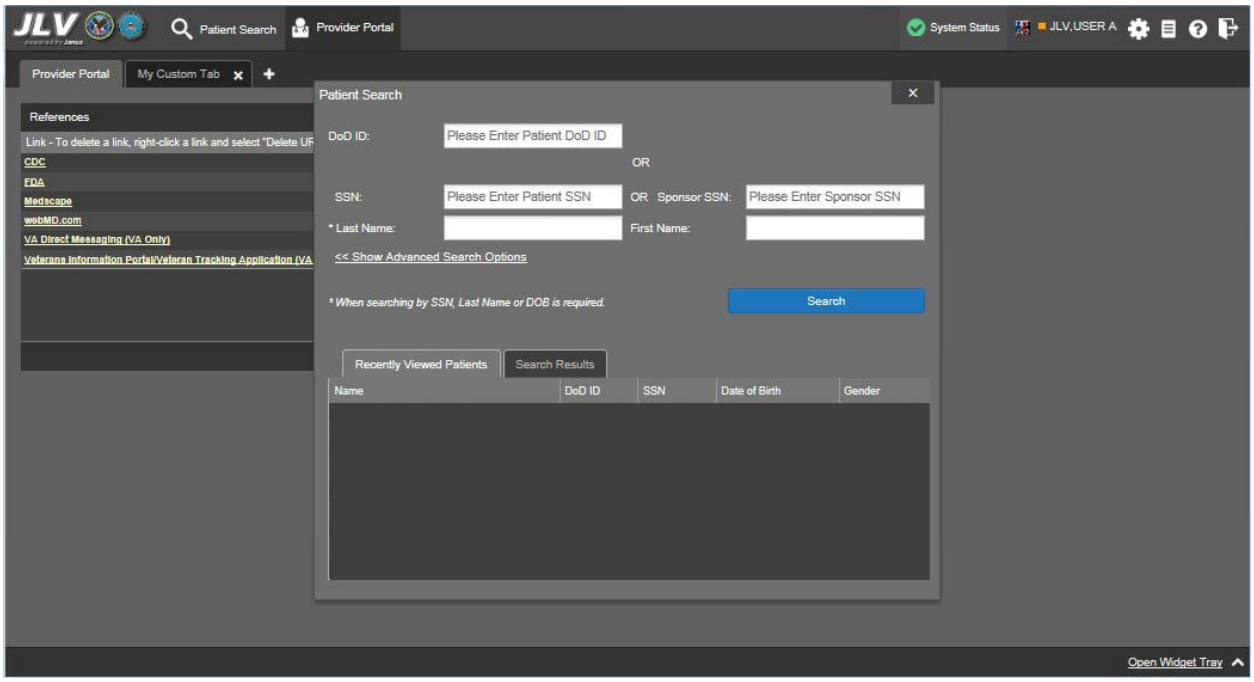
4 Using the Software

After logging in, your user name will show in the upper-right corner of the page. Many users will see the elements shown in the following figure, with the **Patient Search** dialog box open by default over the **References** widget on the Provider Portal.

The **References** widget displays the provider's references to online clinical medicine resources, which are provided as hyperlinks. Click a **reference link** to access the associated web site. To add a new reference link, click **Add**. To delete a reference link, right-click and select: Delete URL. Users will not be able to delete references included in the default widget configuration.

In this release, only the **References** widget is available to JLV users from the Provider Portal.

Figure 16: Default JLV Page



4.1 Accessing Patient Data

The core function of JLV is the display of patient-centric information in the Patient Portal. Use Patient Search (dialog box shown in the previous figure) to search for a patient using DoD ID, Social Security Number (SSN), advanced search options, or perform a family search. After the first patient search, the Patient Search dialog will also contain a list of Recently Viewed Patients for quick access to patient records.

Supported Searches

The following search combinations are supported in JLV:

- DoD ID (Electronic Data Interchange Personal Identifier [EDIPI])
- (Patient) SSN and Last Name
- (Patient) SSN and Date of Birth (DOB)
- Sponsor SSN and Last Name
- Sponsor SSN and DOB
- Last Name, First Name, DOB, and Gender (user must enter ALL identifiers)

Search Rules

JLV utilizes Patient Discovery Web Service (PDWS) for patient search and as such, must adhere to interface rules and rule sets. This release (JLV 2.5.1) specifically adds the ability to search the MVI, when PDWS is absent of an EDIPI. The PDWS interface rules and rules sets are:

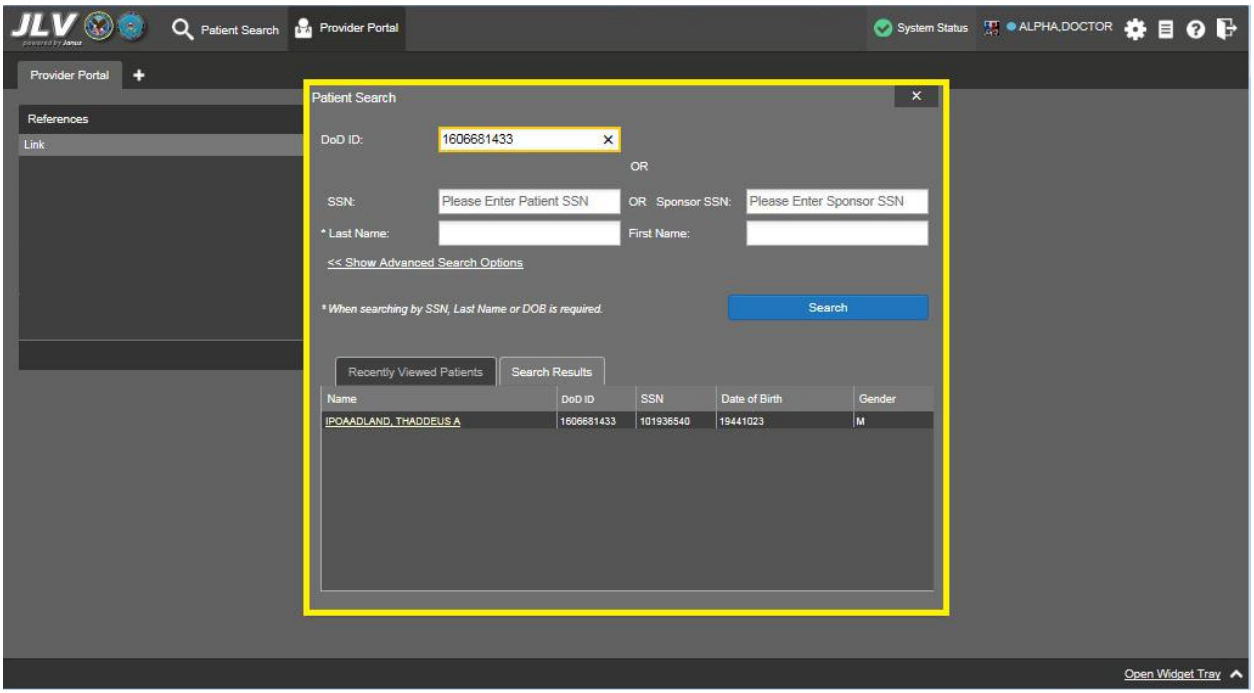
- Rule Set 1: When searching by SSN, the full nine-digit SSN must be entered and the Last Name or DOB must also be supplied. This is true for search by SSN (Patient) as well as Sponsor SSN.
- Rule Set 2: If you do not have the SSN identifier, you must supply ALL of the following identifiers: Last Name, First Name, DOB, and Gender. Blanks in any of the four required fields will cause an error.
- A ten-digit string is required for telephone number.

4.1.1 Performing a Patient Search Using DoD ID

To perform a patient search using DoD ID:

1. Click **Patient Search** at the top of the portal page.
2. In the **Patient Search** dialog box, click in the **DoD ID** field and enter the eleven (11)-digit patient DoD ID.

Figure 17: Patient Search Using DoD ID



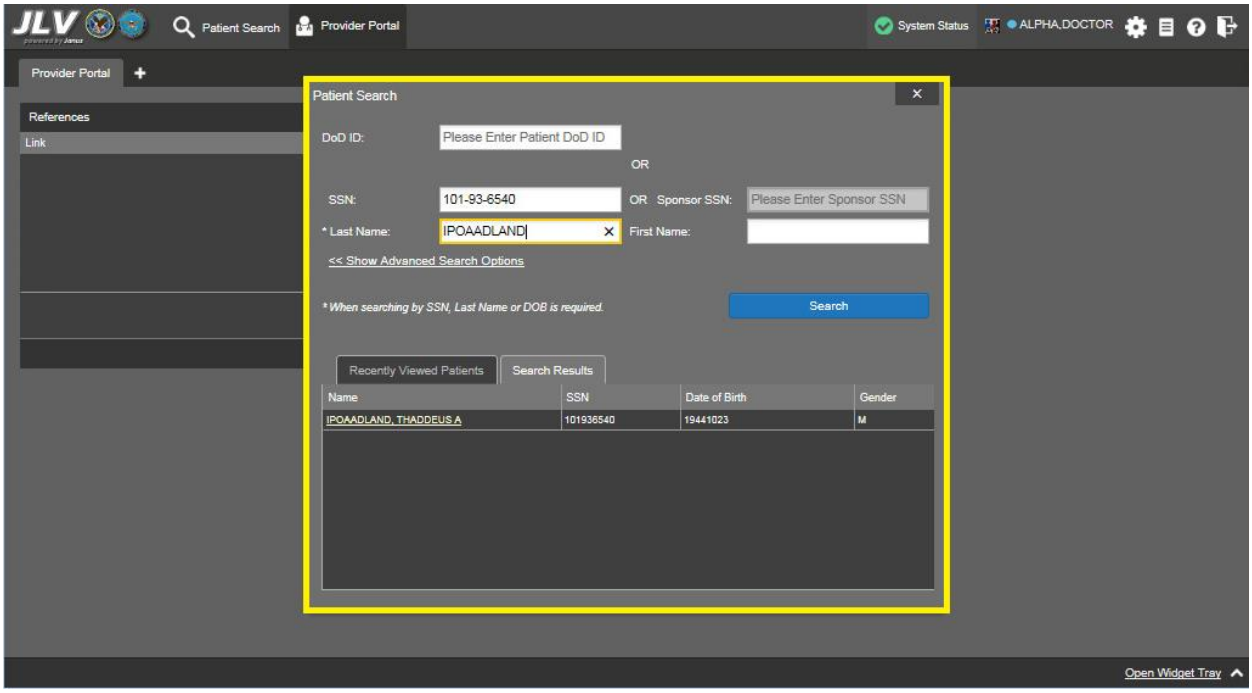
3. Click **Search**.
4. Search results are displayed in the lower third of the **Patient Search** dialog box within the **Search Results** tab.
5. Click an entry from within the column display to open that patient's record. The Name, SSN, DOB, and Gender columns provide information to assist with patient identification.
6. After selecting a patient, the **Patient Portal** will begin loading the patient's records.

4.1.2 Performing a Patient Search Using Patient SSN

To perform a patient search using patient SSN:

1. Click **Patient Search** at the top of the portal page.
2. In the **Patient Search** dialog box, click in the **SSN** field and enter the patient's full nine (9) digit SSN.
3. Refer to Section 4.1, Accessing Patient Data and follow the patient Search Rules that are outlined. The **Last Name** or **DOB** must also be entered in the fields provided.

Figure 18: Patient Search Using SSN Field



4. Click **Search**.
5. If you click **Search** without providing the required patient identifiers, hover text appears indicating what needs to be provided before the patient search can proceed.
6. Search results are displayed in the lower third of the **Patient Search** dialog box within the **Search Results** tab.
7. Click an entry from within the column display to open that patient's record. The Name, SSN, DOB, and Gender columns provide information to assist with patient identification.
8. After selecting a patient, the **Patient Portal** will begin loading the patient's records.

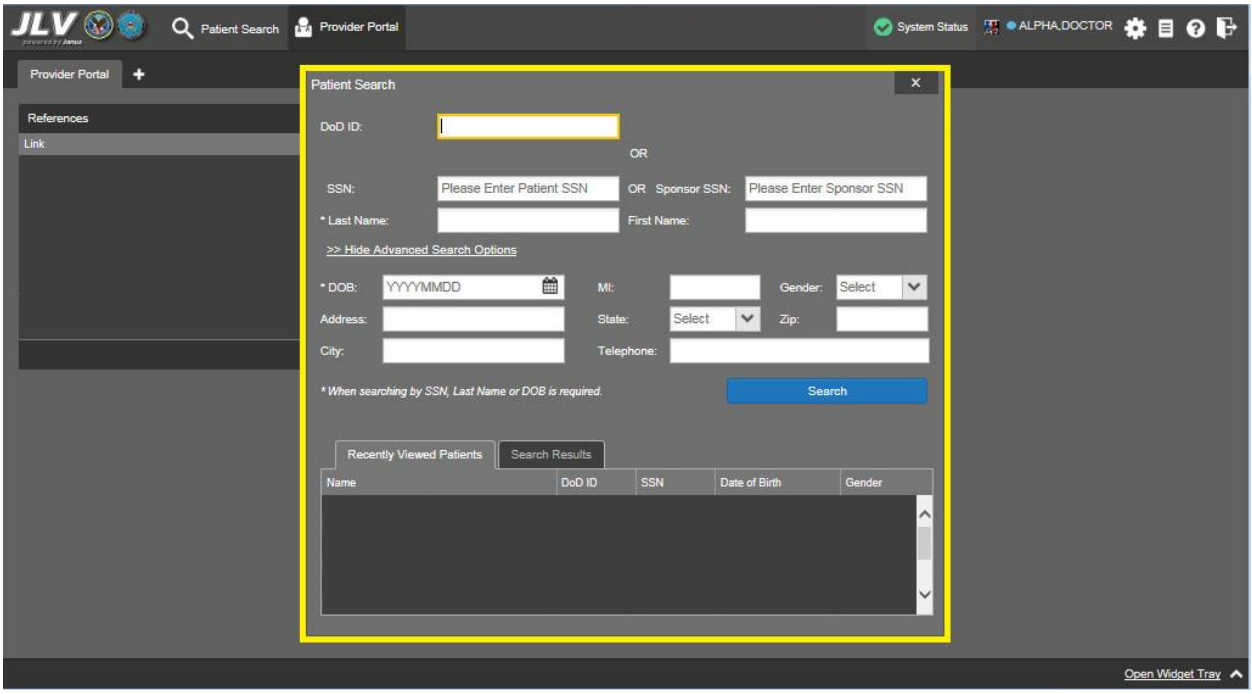
4.1.3 Advanced Patient Search Options

Advanced patient search options are provided in the **Patient Search** dialog box to allow for a patient search using additional patient identifiers:

1. Click **Patient Search** at the top of the portal page.

2. In the **Patient Search** dialog box, click the **<<Show Advanced Search Options** link in the middle of the dialog (shown in the previous figure).
3. Following the search rules described in Section 4.1, Accessing Patient Data, enter patient identifiers in the search field as desired. Advanced search option fields include DOB, Gender, Address, City, State, Zip, and Telephone.

Figure 19: Patient Search > Advanced Search Options



4. Click **Search**.
5. If you click **Search** without providing the required patient identifiers, hover text appears indicating what needs to be provided before the patient search can proceed.
6. Search results are displayed in the lower third of the **Patient Search** dialog box within the **Search Results** tab.
7. Click an entry from within the column display to open that patient's record. The Name, SSN, DOB, and Gender columns provide information to assist with patient identification.
8. After selecting a patient, the **Patient Portal** will begin loading the patient's records.

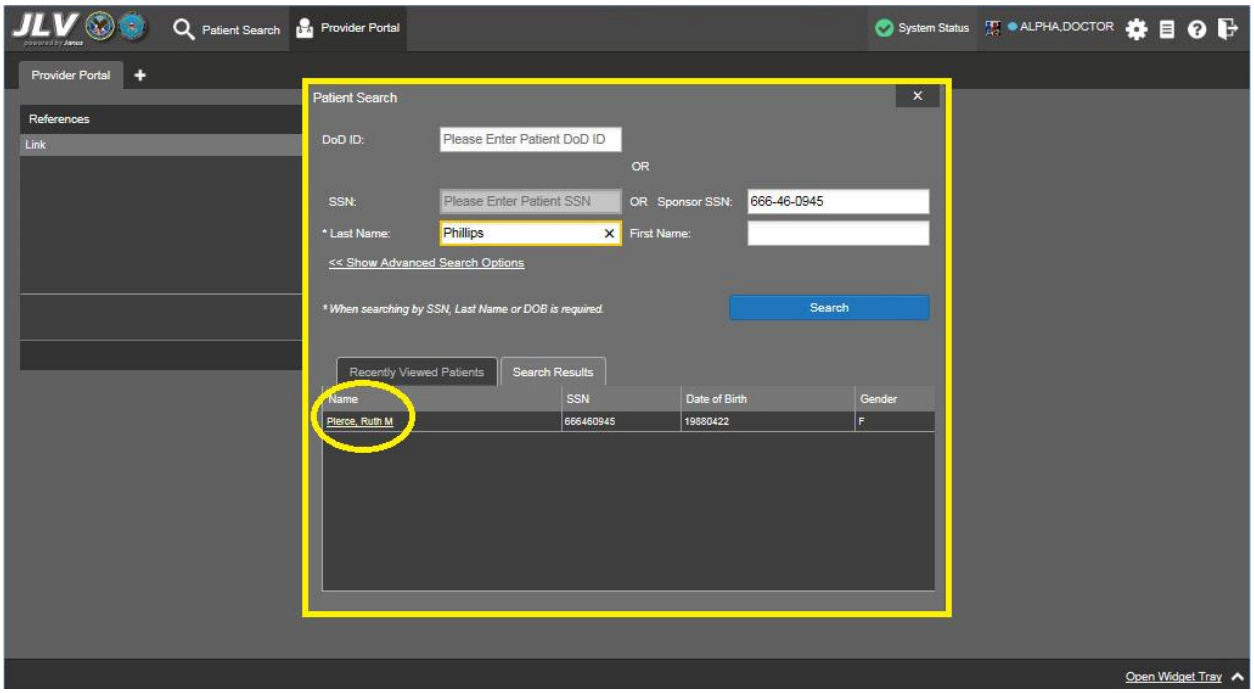
4.1.4 Family Member Search

JLV allows a user to perform a family member search using the Sponsor SSN field in the Patient Search dialog box:

1. Click **Patient Search** at the top of the portal page.
2. In the **Patient Search** dialog box, click in the **Sponsor SSN** field.

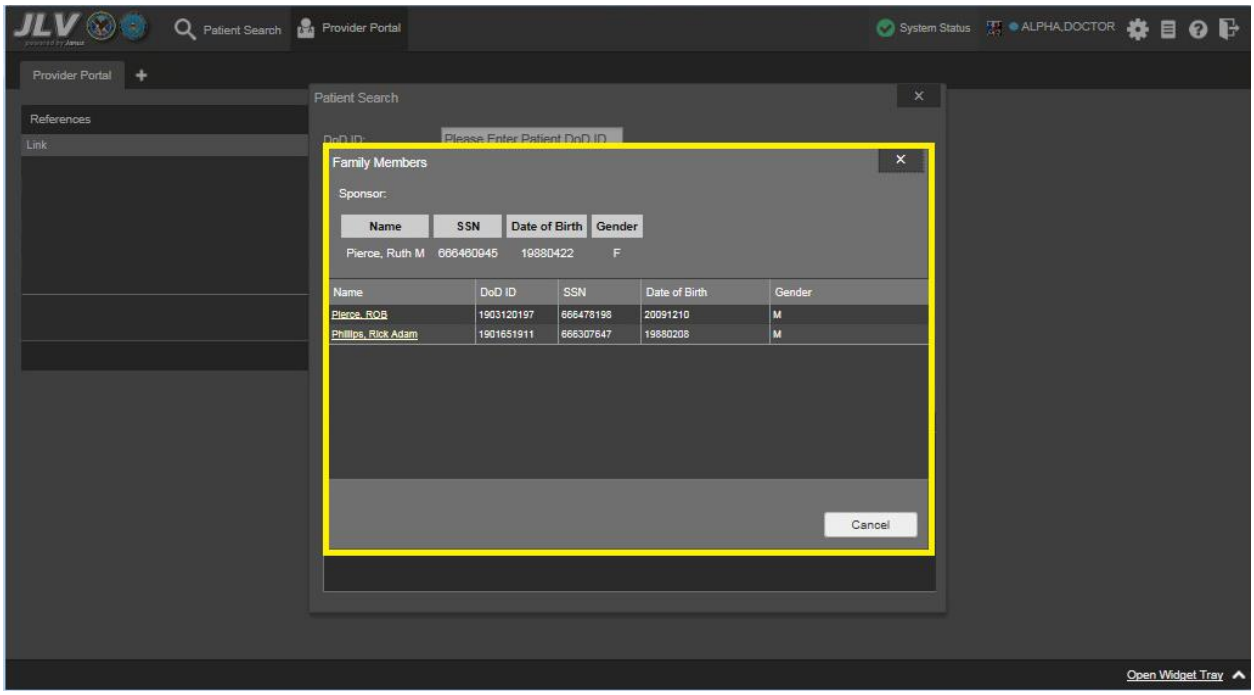
3. Following search rules in Section 4.1, Accessing Patient Data, search by SSN. The **Last Name** or **DOB** of the patient must also be entered in the fields provided.
4. Click **Search**.
5. If you click **Search** without providing the required patient identifiers, hover text appears indicating what needs to be provided before the patient search can proceed.
6. Click a name in the **Search Results** table. The **Family Members** dialog box opens (as seen in the following figure) and displays the sponsor's identifiers and a list of dependents associated with the sponsor.

Figure 20: Patient Search Using Sponsor SSN Field



7. Click a name from the list of dependents (as seen in the following figure).
8. After selecting a patient, the **Patient Portal** will begin loading the patient's records.

Figure 21: Family Member Search: Family Members List



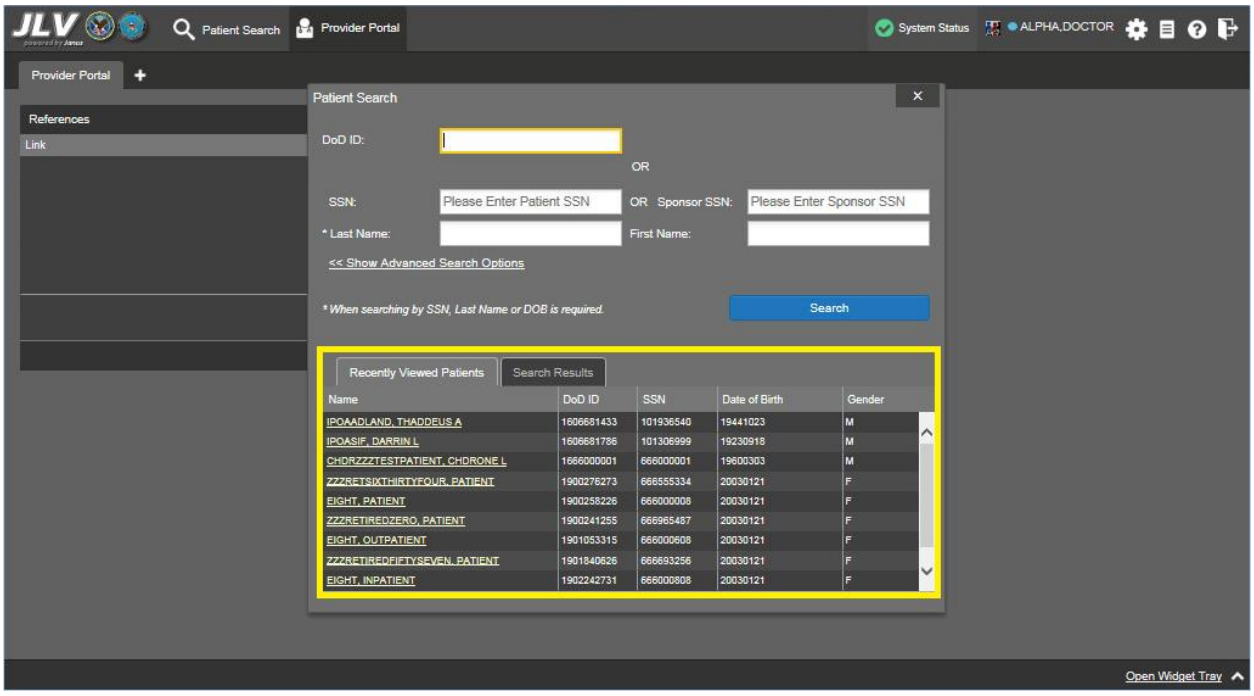
4.1.5 Recently Viewed Patients

Users who have previously logged into JLV and viewed patient records will have a list of recently viewed patients displayed in the lower third of the **Patient Search** dialog box (highlighted in the following figure) at any time they initiate a patient search. The table will include Name, DoD ID, SSN, Gender, and DOB columns for patient identifiers.

In the list, click a link from the Name column (example shown in the following figure) and the **Patient Portal** will begin loading the patient's records.

NOTE: A recent patient is defined as a patient record that has been viewed by the user. The Recently Viewed Patients list will not include search history or recent search results. The list is limited to ten (10) patients.

Figure 22: Recently Viewed Patients



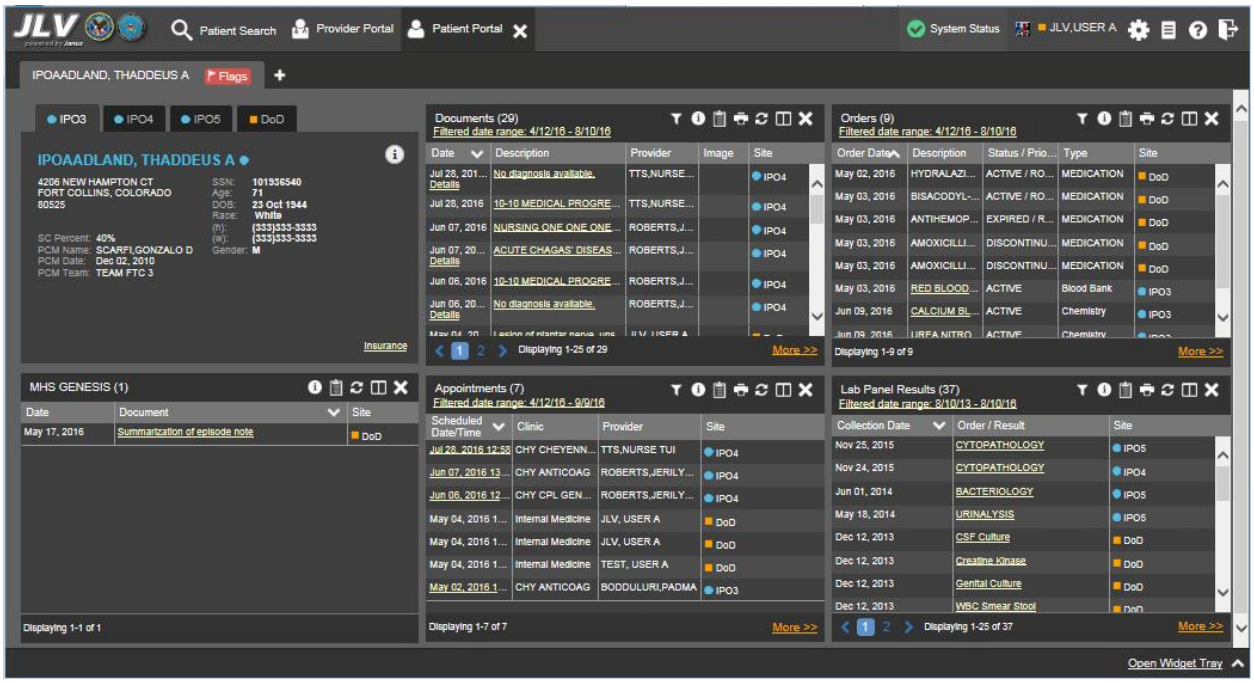
4.2 Widgets

Widgets are elements within the JLV portals that contain and display data specific to a clinical domain. On the JLV portal, the list of available widgets is provided in a horizontal tray at the bottom of the page.

Widgets can be removed by clicking **Close** ✖ in the top-right corner, added to the portal page by dragging the icon from the widget tray and re-arranged on the portal page as needed using drag-and-drop actions.

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

Figure 23: Sample Widgets on the Patient Portal



4.2.1 Accessing and Opening Widgets

To view a widget in the Patient Portal, locate the widget name in the horizontal tray that is displayed on the bottom of the portal (as seen in the following figure). Left-click and drag the selected widget from the tray to the portal screen. This action opens the minimized view of the widget on the portal.

The following example displays the Patient Portal with an open widget tray highlighted at the bottom of the screen. If the widget tray is not open, click the **Open Widget Tray** link or click the **Expand** icon ^ in the lower right-hand corner of the portal screen. This button opens the tray on the portal.

Once open, to view all clinical domains available in the Patient Portal in the widget tray, use the arrows (< or >) placed below the tray or the **More Widgets** links placed above the tray buttons and scroll left to right or right to left through the tray.

Refer to Section 4.9, Patient Portal Data Displays for a detailed overview of the widgets within the Patient Portal.

Figure 24: Widget Tray on the Patient Portal

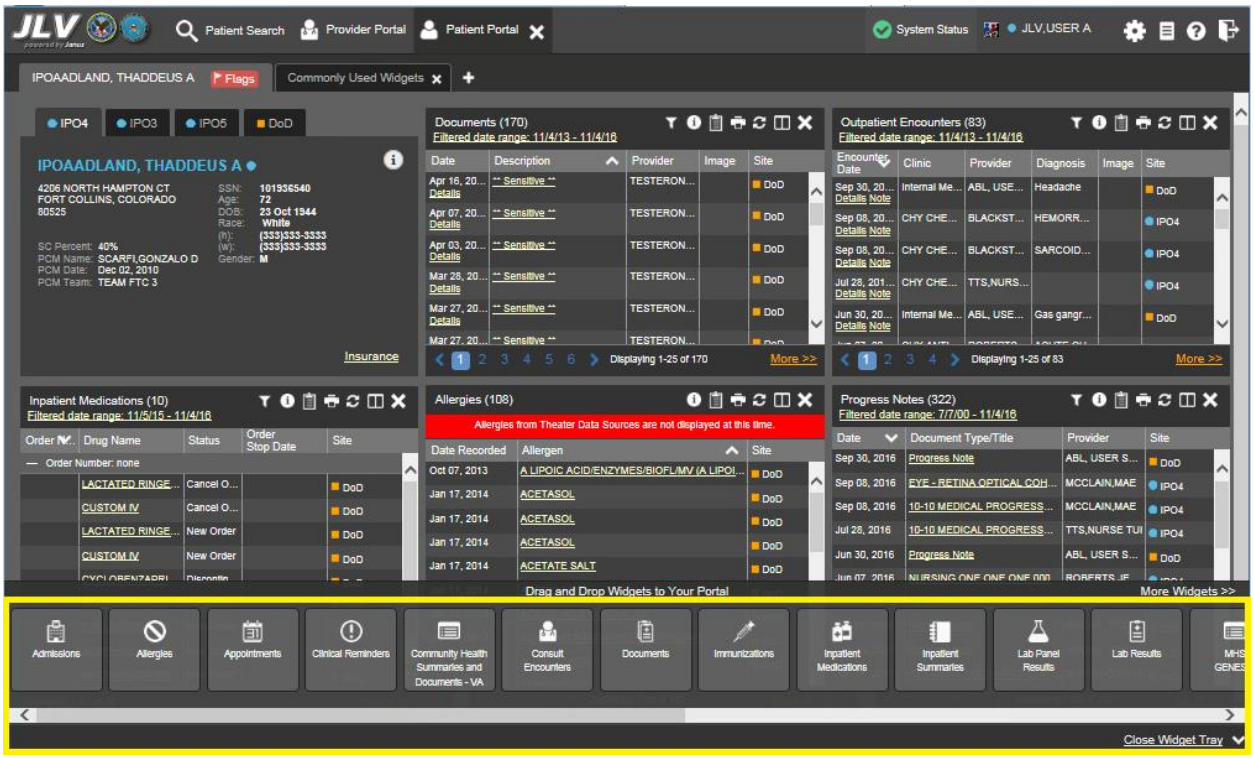
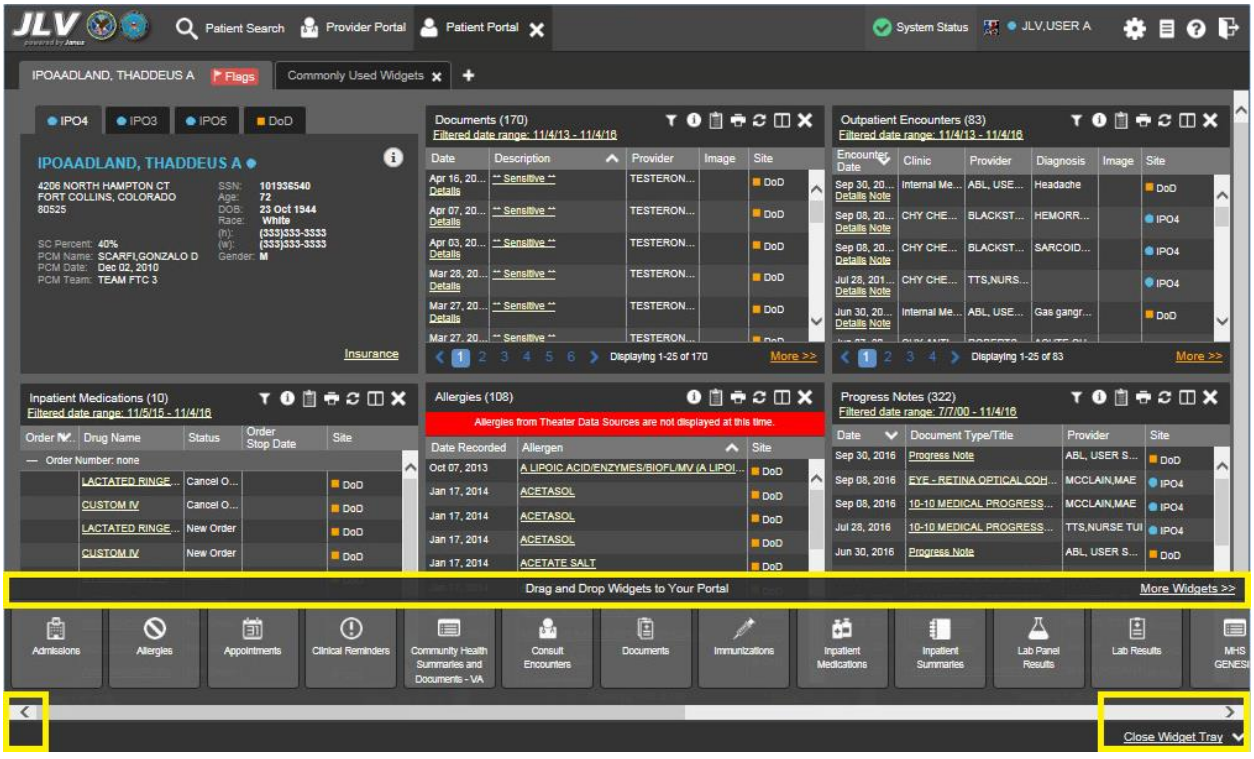


Figure 25: Widget Tray Navigation Tools



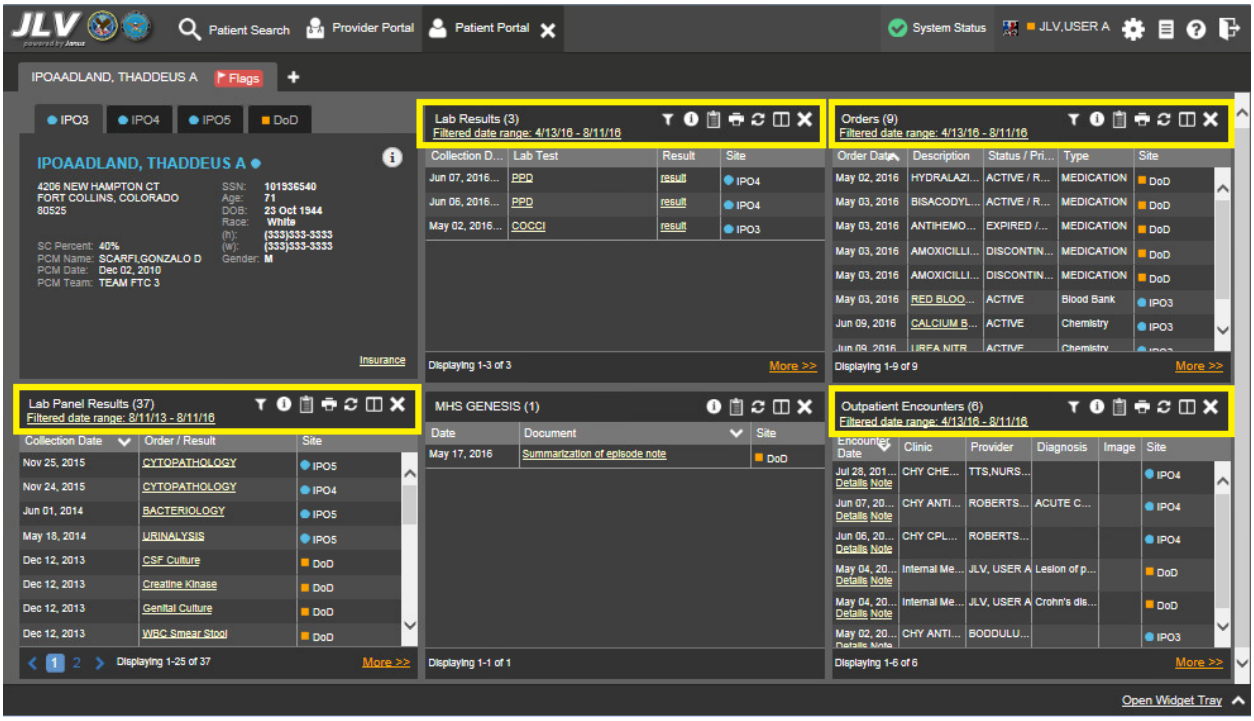
4.2.2 Minimized vs. Expanded View

Each widget can be displayed in a minimized view or an expanded view. The first rendering or display of a widget is a minimized view as shown the following figure.

If a date range filter is applied in a displayed widget, the date range is indicated in the widget header below the title. In the sample figure, a filtered date range is applied in the **Lab Results**, **Orders**, **Lab Panel Results**, and **Outpatient Encounters** widgets. Open or close the filter options by clicking on the date range link in the header.

Click the **More >>** link available at the bottom of the widgets to see the expanded view. Accessing the expanded view of the widget provides additional display and filtering options. Click Configure Filter or the date range filter link from the widget toolbar if not displayed by default in an open expanded view.

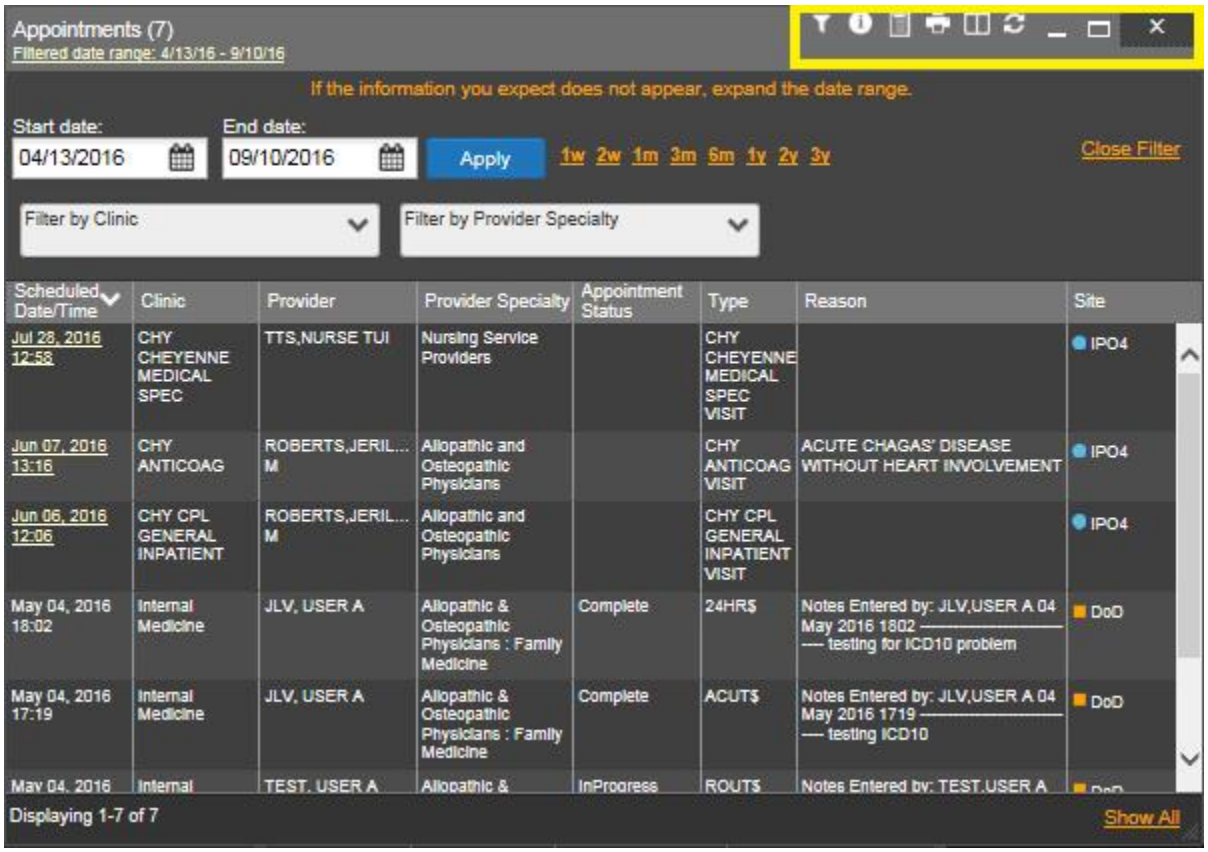
Figure 26: Filtered Data Range Examples on Minimized Widgets



4.2.3 Widget Toolbar Buttons

Toolbar buttons are provided in the upper-right corner in both the minimized and expanded views of each widget.

Figure 27: Widget Toolbar Icons



The previous figure highlights the placement of the toolbar icons within the expanded view of the **Appointments** widget. Icons vary by widget. The following table describes the function of icons seen in this example as well as other widgets.

Table 7: Toolbar Icons

Icon	Name	Function
	Configure Filter	Allows a user to filter on specific record types or other elements within the widget, including a date filter. If a Date Range filter is applied in an open widget, the date range is displayed in the widget header. NOTE: After setting a filter, the Close Filter option is enabled in the widget. Clicking Close Filter will restore the full display of records within the widget.
 	Interface Status	Both icons provide a status indicator for DoD, VA, and community partner data sources. The circle with the lowercase "i" indicates all sources are available. The yellow triangle warning indicates one or more data sources are unavailable. Clicking either status icon will open the Interface Status details in a separate window. **NOTE:** Interface status updates are not available from the Clinical Reminders widget.

Icon	Name	Function
	Copy to Clipboard	Copies content of the open window to the clipboard for pasting into another application.
	Print	Prints contents of the open window. **NOTE:** Printing is disabled in the widget toolbar after clicking Show All within a widget.
	Refresh	Refreshes the widget or window display. Only the data within that widget's dataset is updated.
	Column Settings	Allows the user to configure the columns within the widget. Turn on or off the columns displayed by checking the column names that appear in the pop-up box and checking Apply.
	Close	Removes the widget from the portal screen or closes the expanded view of the widget.
	Rx	Converts the medications data within the widget to text and opens text in a pop-up window. Available from the Outpatient Medications widget.
	Site List	Opens a list of community sites where the patient has been seen (only available from the Community Health Summaries and Documents– VA widget).

4.2.4 Refreshing Widgets

Data in the widget display can be refreshed by clicking **Refresh** . This action will refresh the widget and display the DoD and VA data JLV has stored in a cache.

4.2.5 Widget Navigation & Display Options

Navigation tools and display options are provided within each widget that allows you to navigate through sections of data results within the widget. A vertical scroll bar allows you to scroll and view data that is in the widget page, while options at the bottom of the widget allow for navigation through all records for that domain loaded into JLV.

The functionality for the navigation tools shown in the following sample widget is further explained in the following table.

In the following figure, there are forty-seven (47) total records loaded into the Problem List widget, grouped in Show Paged view. Records 1 – 25 can be viewed by using the widget's vertical scroll bar. Records 26 - 47 can be viewed using page navigation options in the lower-left corner of the widget to jump to subsequent pages.

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

Figure 28: Widget Navigation Tools

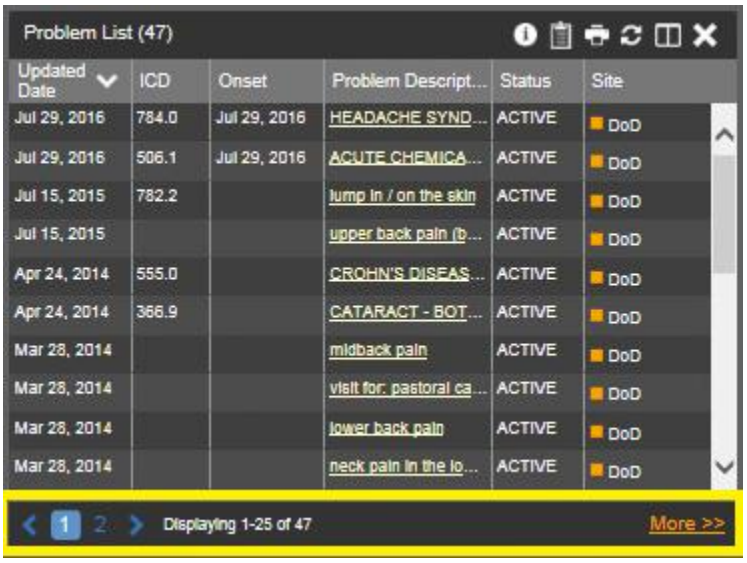


Table 8: Widget Navigation Tool Descriptions

Navigation Button	Meaning	Description
<	Go to Previous Page	Changes the focus of the widget to the previous group or page of records within the results display.
1	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.
1-25 of 47	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.

4.2.6 Date Range and the Quick Date Range Widget Display Filter

If a Date Range filter is applied in a displayed widget, the Date Range is indicated in the widget header below the title. In the sample figure below, a filtered Date Range is applied in the **Lab Results, Orders, Lab Panel Results**, and **Outpatient Encounters** widgets. Open or close the filter options by clicking on the **Date Range** in the header.

Click the **More** >> link available at the bottom of the widgets to see the expanded view. Click **Configure Filter** or the **Date Range** filter link from the widget toolbar if not displayed in an open expanded view.

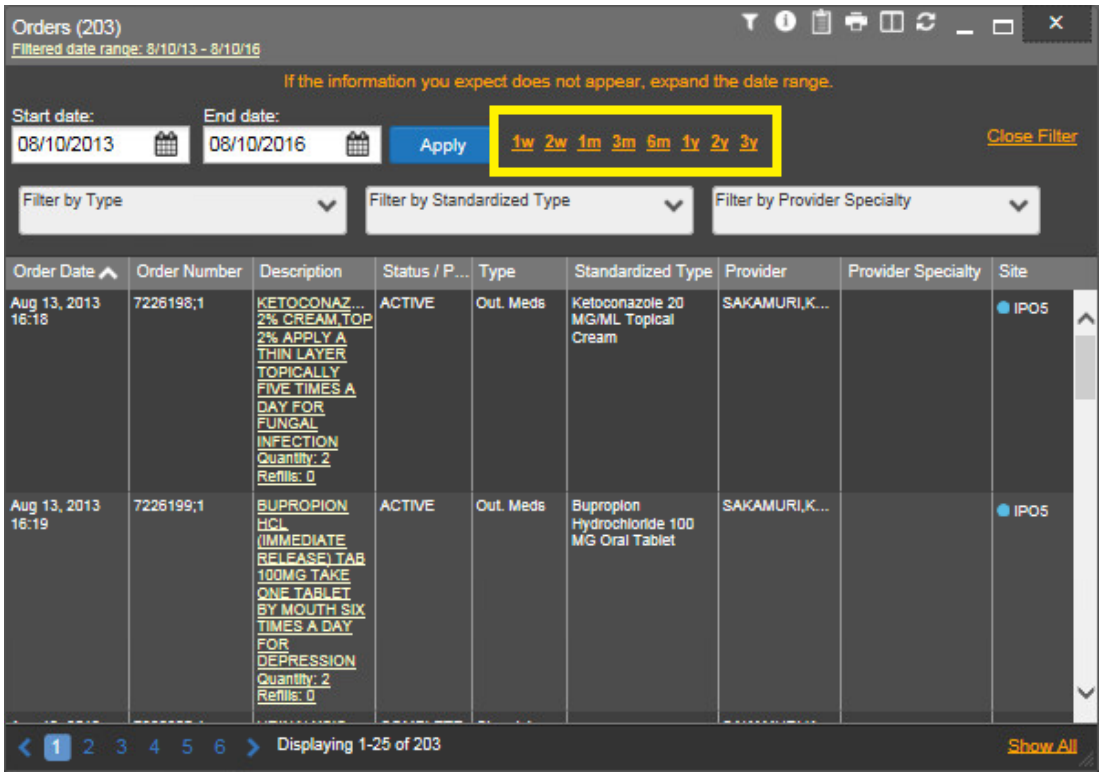
Use the Quick Date Range Selector to set or limit the display of patient records within a particular widget to a preset date range. This option is available in multiple widgets on the Patient Portal.

Clicking a **date range** will refresh the display to show only the records for the selected range. The options represent the time counting back from the present day (for example, selecting 2y would limit the data display within the widget to show only records within the last two years). Examples of preset date ranges include:

- 1w = 1 week
- 2w = 2 weeks
- 1m = 1 month
- 3m = 3 months
- 6m = 6 months
- 1y = 1 year
- 2y = 2 years
- 3y = 3 years

The following example below highlights the Quick Date Range Selector options in the expanded view of the Orders widget.

Figure 29: Sample Quick Date Range Selector



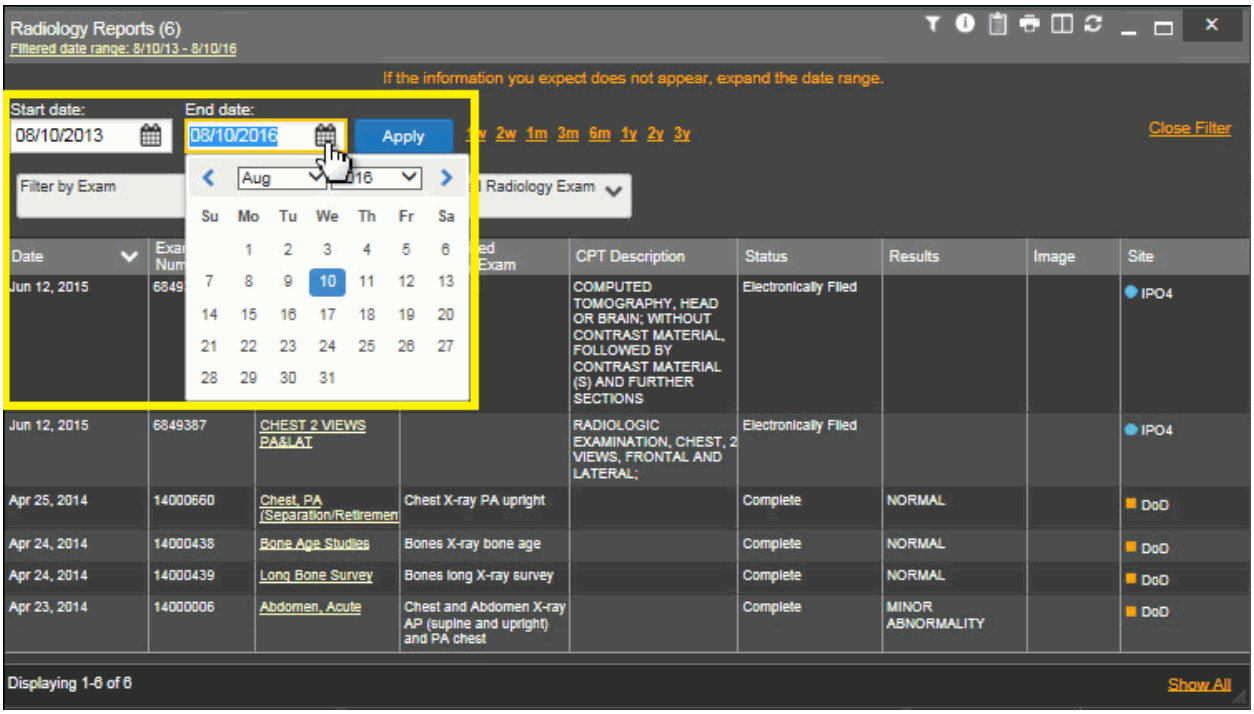
4.2.7 Start and End Date Widget Display Filter

You can set a date range to filter or limit the displayed data in a widget using the **Start Date** and **End Date** tools. These fields are available at the top of multiple widgets in expanded view, or when you click **Filter** in minimized view. The following figure provides an example of the Date Filter fields in the expanded view of the **Radiology Reports** widget.

To set the date range, click **calendar** next to **Start Date** and select a **start date** for the Display filter. Next, click the **calendar** icon next to **End Date** to select the end date for the Display filter. With both a start date and end date displayed in the fields, click **Apply**. The widget will refresh the display to show only the records from the entered date range and the date range is displayed in the widget header.

NOTE: If the expected information does not appear in the widget display, use the date filter options to expand the date range.

Figure 30: Date Range Display Filter Tools



4.3 Context Management

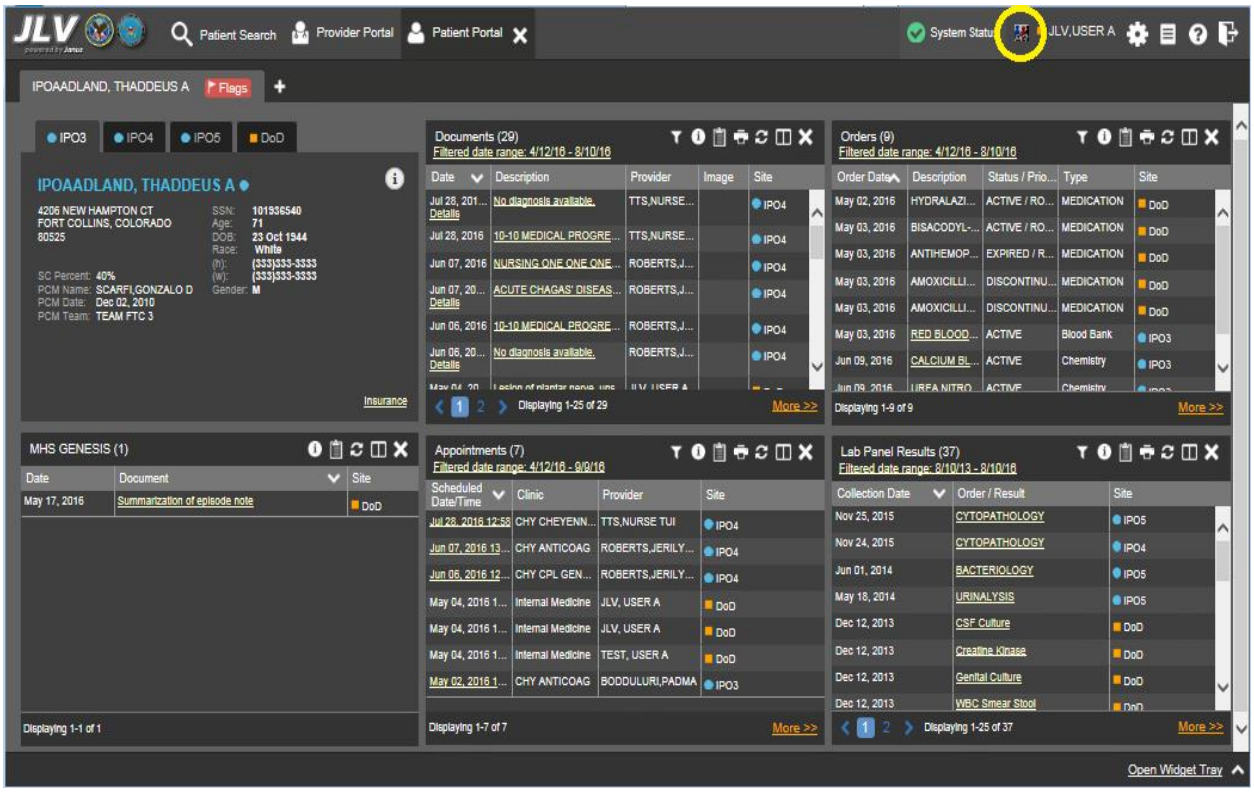
Clinical Context Management (also referred to as Clinical Context Object Workgroup [CCOW] is a way for applications to synchronize their clinical context based on the Health Level 7 CCOW standard. If CCOW-compliant applications are sharing context and one of the applications changes to a different patient, the other applications will change to that patient as well.

JLV is context management-enabled. When context is enabled, a patient change that is triggered in another context-enabled application (i.e., CPRS) will also cause JLV to change patients. The same effect is shown vice versa; that is, when a patient is selected in JLV, it triggers a patient change in other context-enabled applications.

Context management is enabled by default, and JLV will attempt to connect to the context vault upon a valid login. Context status appears in the top-right corner of all JLV screens. When context is established, context on is shown. When context is suspended, context suspended is shown.

The following example shows the context indicator location on a sample JLV portal page. In this example, context is suspended.

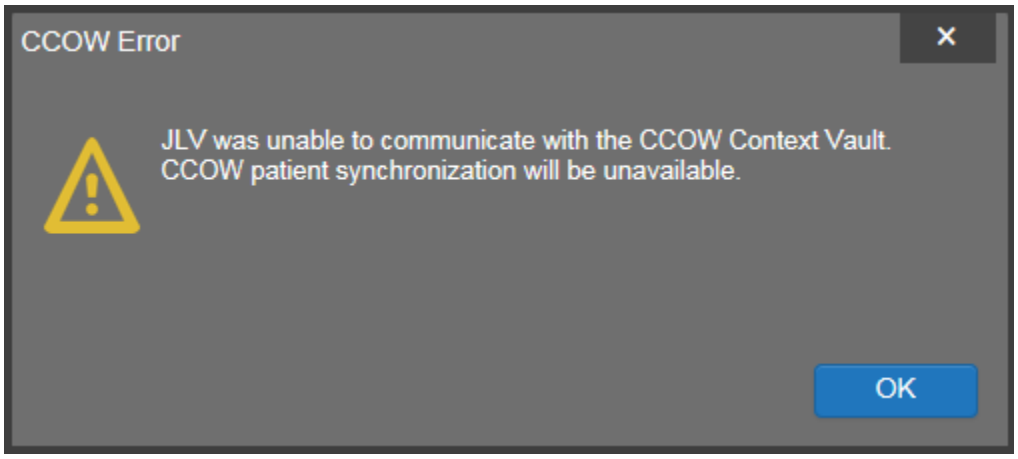
Figure 31: Context Indicator on the JLV Portal Page



4.3.1 Unable to Communicate with Vault Upon Login

If JLV is unable to initiate context management upon log in, the user will see the CCOW Error message: *JLV was unable to communicate with the CCOW Context Vault. CCOW patient synchronization will be unavailable.* Click **OK** to continue. After clicking **OK**, the portal will display the context suspended icon .

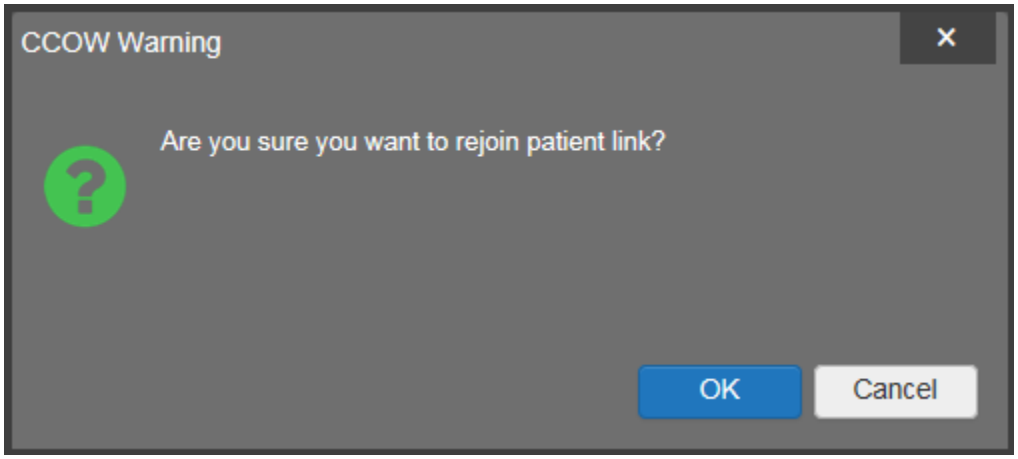
Figure 32: Unable to Communicate with Vault upon Login



4.3.2 Establishing Context

When context is suspended, a user can manually attempt to establish context. Click context suspended to establish or re-establish context. The user is presented a CCOW Warning message that reads, *Are you sure you want to rejoin patient link?* Click **Yes** to continue. When context is established, context on icon will display on-screen in the top-right corner of the JLV portal.

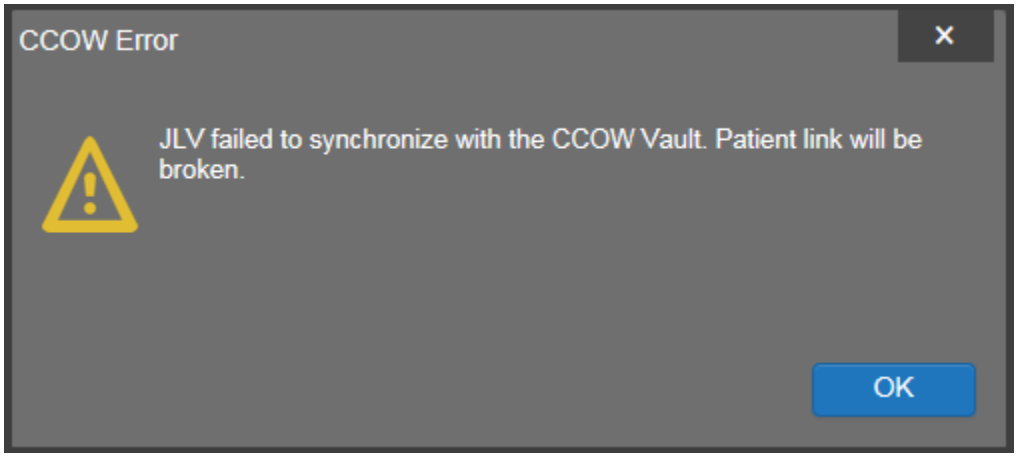
Figure 33: Establishing Context



4.3.3 Context Synchronization Failure

In the event that JLV is unable to re-establish context, the user is presented with a CCOW Error message that reads *JLV failed to synchronize with the CCOW Vault. Patient link will be broken.* This indicates context is suspended. Click **OK** to continue. Context suspended will display on-screen.

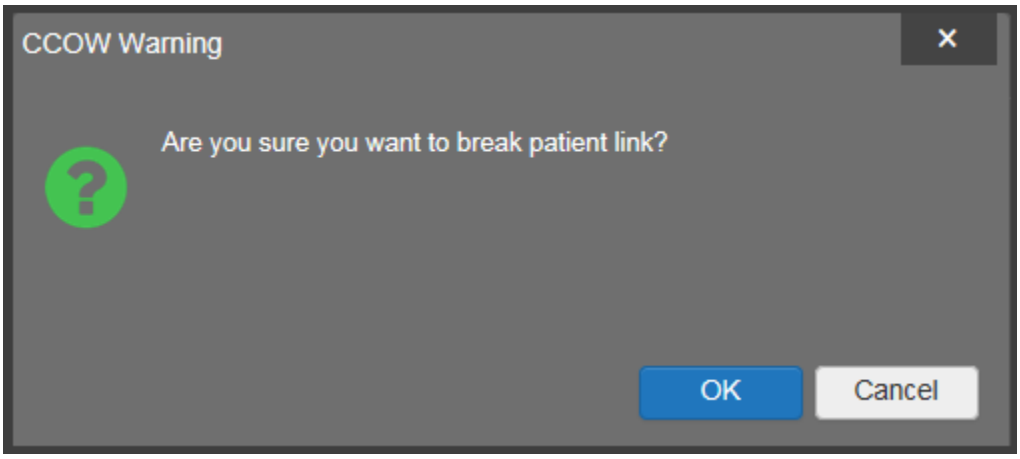
Figure 34: Context Synchronization Failure



4.3.4 Suspending Context

When context is established, context can be suspended by clicking context on . The user is presented a CCOW Warning message that reads, *Are you sure you want to break patient link?* Click **Yes** to continue. Context suspended will display on-screen.

Figure 35: Suspending Context



4.4 Break the Glass and User Restricted Access

The break the glass feature provides the capability to audit the access of select records by particular users:

- VA users (VHA or VBA) viewing DoD-only patients (i.e., there are no VA identifiers for a patient).
- All users accessing sensitive DoD records (outpatient encounters, progress notes, and lab results).

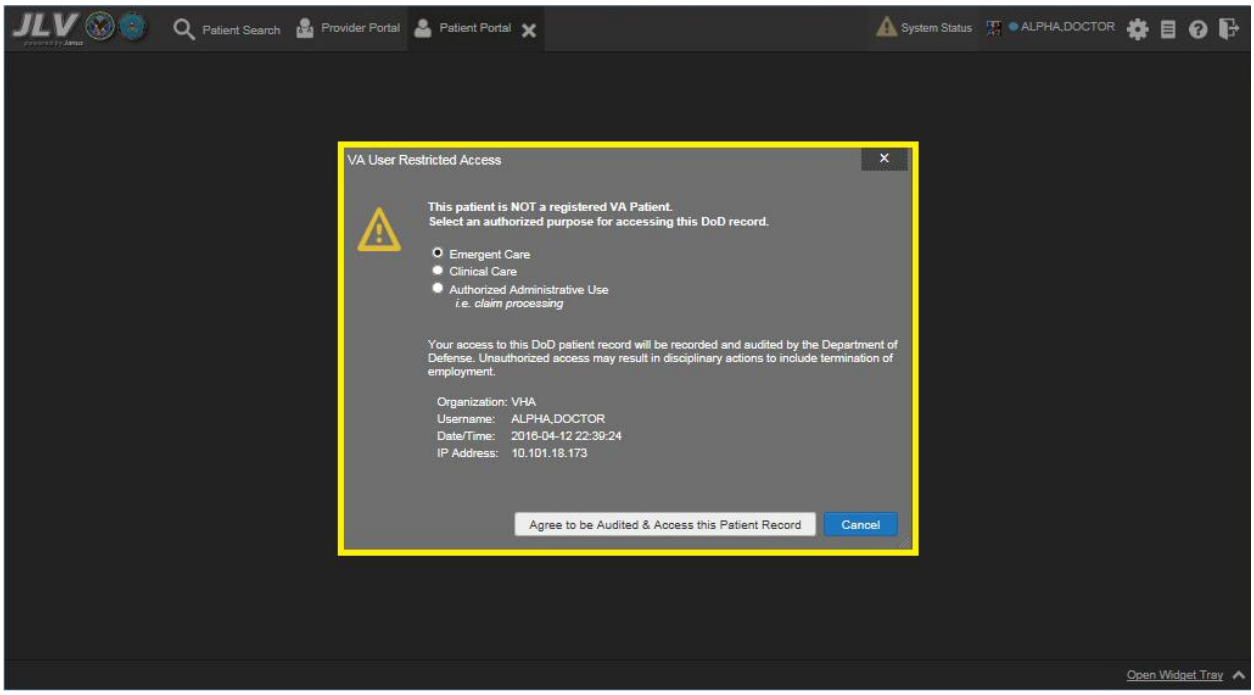
JLV will also check the VA user's access credentials after a patient is selected from the search results presented in Patient Search dialog and enforce additional patient data access restrictions for the following scenarios:

- JLV will deny a VA user the ability to view patient records when the user's SSN is not registered in the user's VistA profile.
- JLV will deny a VA user the ability to view the user's own patient records.

4.4.1 VHA Users Viewing DoD-only Patients

After performing a patient search and selecting a patient from the list presented, the VHA user is asked to specify the purpose of accessing the record. Options presented to the user are: Emergent Care, Clinical Care, or Authorized Administrative Use as seen in the following figure. The following example shows what a VHA user will see when he selects a patient who is not registered in MVI.

Figure 36: VHA User Options for Patient Registered in MVI



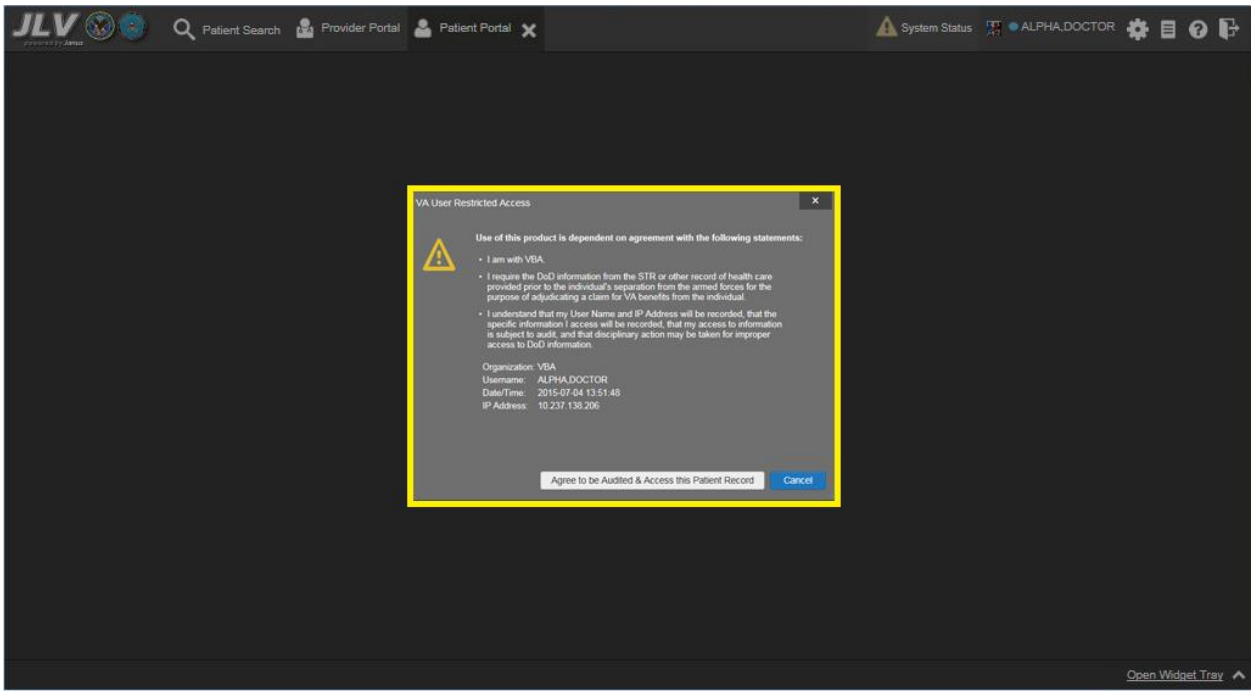
Upon clicking **Agree to be Audited & Access this Patient Record** (as shown in the above figure), JLV displays the requested data in the Patient Portal and an audit is performed. The purpose and organization of a VA provider, including the organization, date, user name, IP address, user's (Employer Identification Number (IEN), host system's ID, and patient's Electronic Data Interchange Personal Identifier (EDIPI), are audited.

4.4.2 VBA Users Viewing DoD-only Patients

VBA users may see two different dialog boxes, depending on whether the patient is registered in MVI:

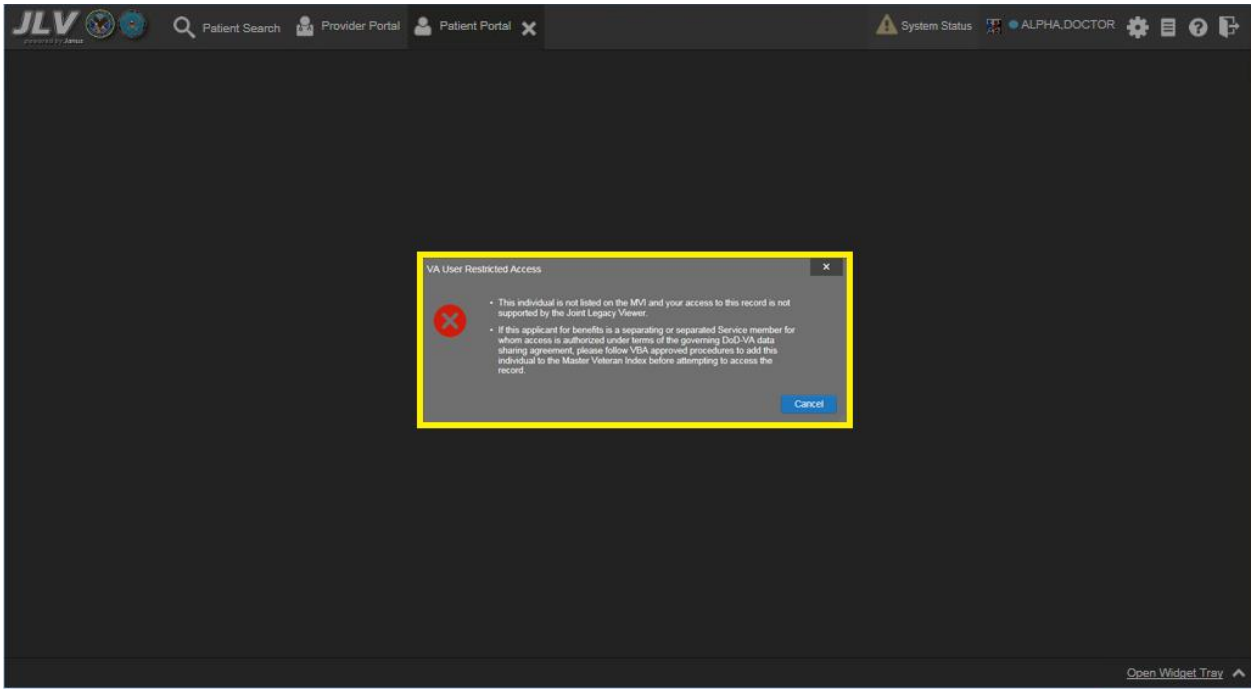
- **Patient registered in MVI.** After performing a patient search and selecting a patient from the list presented, a VBA user will see the following dialog box when he selects a patient whom is registered in MVI. After agreeing to the audit, the VBA user can access the patient's record.

Figure 37: VBA User Options for Patient Registered in MVI



- **Patient not registered in MVI.** A VBA user cannot access the record of a patient not registered in MVI. After performing a patient search and selecting a patient from the list presented, a VBA user will see the following dialog box (as shown in the following figure*)* when he selects a patient whom is not registered in MVI.

Figure 38: VBA User Options for Patient Not Registered in MVI



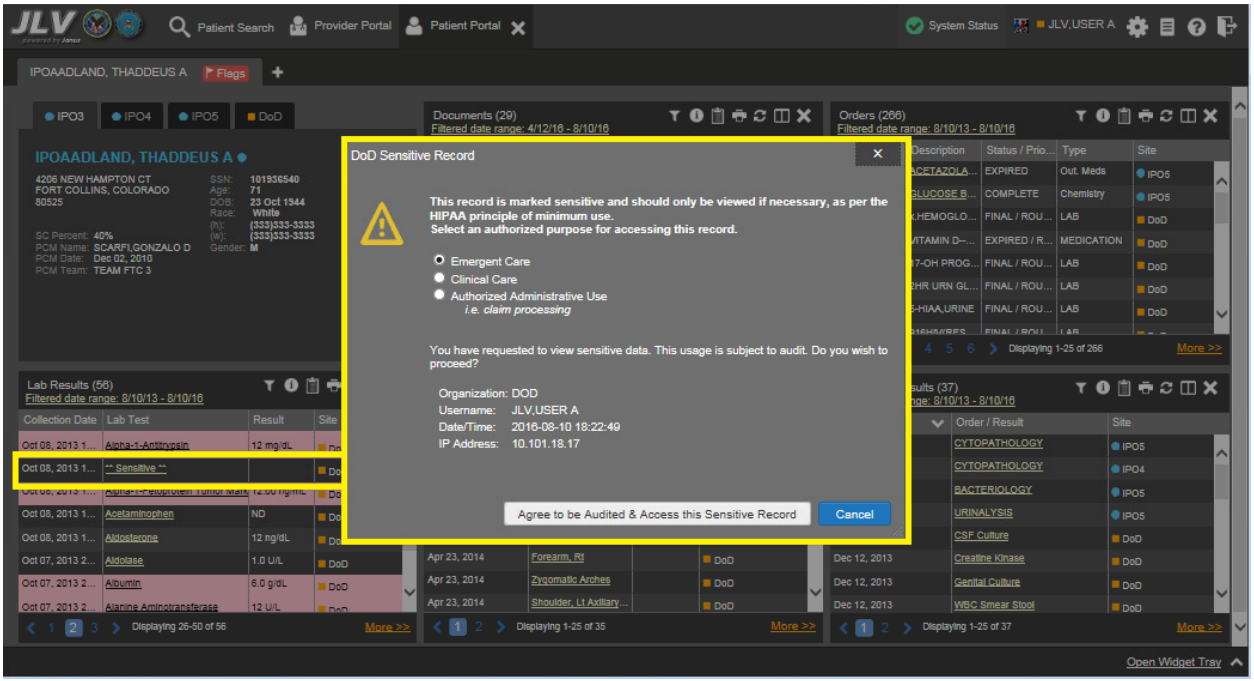
4.4.3 Access to DoD Sensitive Records

All JLV users will be audited each time a sensitive DoD record is accessed (this applies to sensitive outpatient encounters, progress notes, or labs results records). For each attempt to access sensitive data (successful or unsuccessful), JLV will record the user's organization, user name, user SSN/EDIPI (for DoD users), user Personal Identification Verification (PIV) (for VA users), user location, patient (including identifiers: Patient Last, First Name, Military Intelligence (MI); SSN/EDIPI (DoD only), MVI (VA only); DOB), data accessed (e.g., unique note identifier), date/time, and reason for access (e.g., Emergent Care, Clinical Care, and Authorized Administrative Use). Audit information will be sent to and stored in the JLV Database.

JLV will notify users before they are audited. This message is triggered when the user clicks the **Masked Record** (i.e., ****Sensitive****). Both the masked record displayed in the widget and the audit notification is seen in the example shown in the following figure.

After the user selects his/her purpose to view the record and agrees to be audited, sensitive data will appear in the Details view of the JLV widget.

Figure 39: Sample Audit Notification Message for Sensitive Record



NOTE: A user will be prompted every time a sensitive record is selected (for outpatient encounters, progress notes, and lab results data types), even if the user has been audited previously for the same record.

4.5 Using the Report Builder

The Report Builder allows the user to build a custom report by selecting any record or combinations of supported documents and exports the details of the record or document to a

single report. The Report Builder allows printing to a printer or to a file (in Portable Document Format [PDF] format).

NOTE: For the Report Builder and other JLV features, it is recommended that JLV users have the latest Adobe Reader installed on the system from which they access JLV.

4.5.1 Creating Reports with the Report Builder

The Report Builder is initiated by clicking the **Report Builder** icon from the top-right corner of the Patient Portal. You can build a report by adding patient records or documents from both the minimized and expanded views of widgets. For a record with a Details or Notes view, a button is available in the window's toolbar to integrate the additional record information into the report.

To create a report using the Report Builder:

1. Click **Report Builder** from the widget toolbar.
2. Select records to add to the report:
   - Any record within a widget can be added by right-clicking the entry in an open widget and selecting **Add Record to Report** (example shown in ***Error! Reference source not found.***).
   - Records for which JLV prints a document to PDF format can also be added to the Report Builder. For these records, click the link in the widget as if you were to open the record. The Document Ready dialog appears, with three options: **Download**, **Add to Report Builder**, and **Cancel**. Clicking **Add to Report Builder** will add the document to the Report Builder pane and a PDF will be integrated into the generated report. (Clicking **Download** will open the record for viewing and will not be added to the Report Builder.)
   - For a record with a Details or Notes view, click **Add Record** in the toolbar of the open Details or Notes window to add the additional record information to the Report Builder tool.

Figure 40: Add Records to a Report through Toolbar

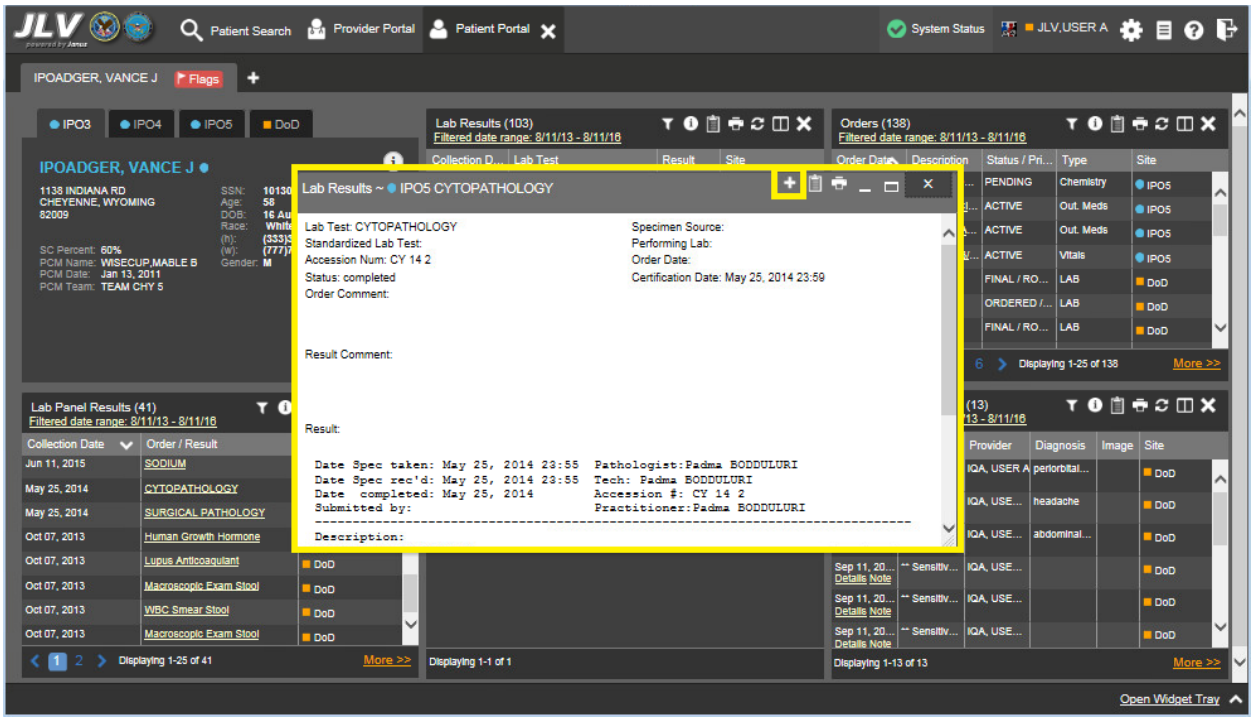
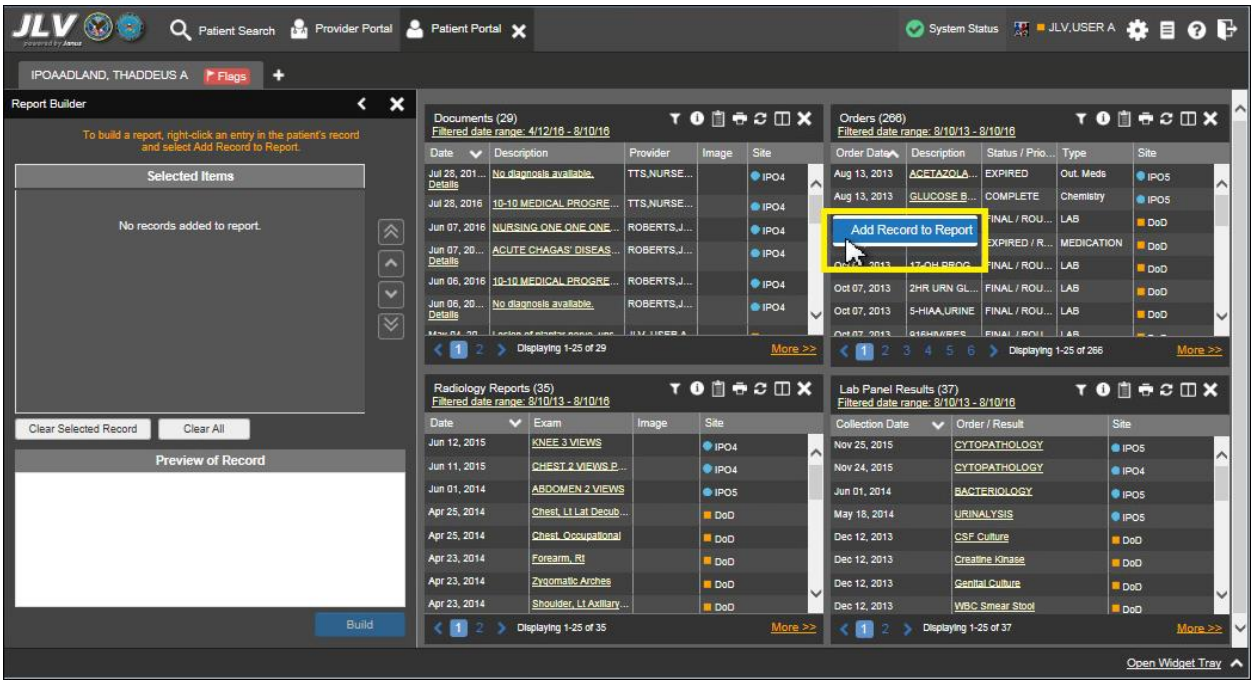


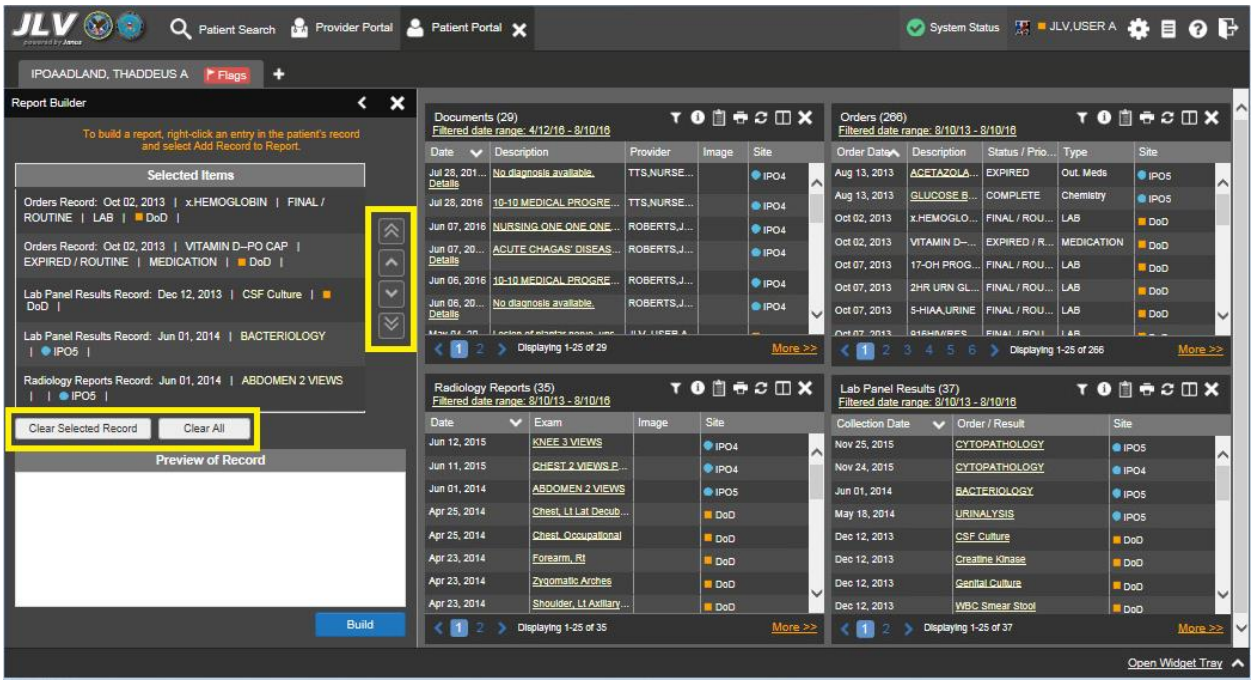
Figure 41: Right-click Record to Add to Report Builder



3. Records added will appear in the Report Builder window (sample shown in the next figure).

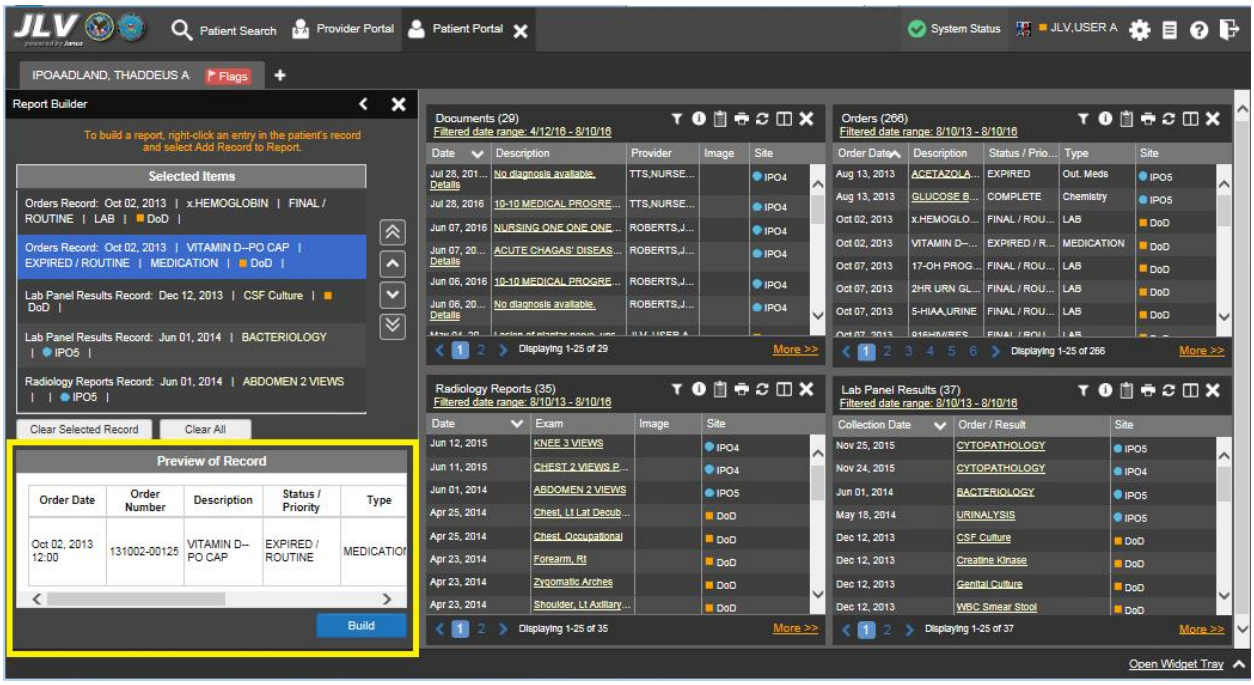
4. Use the up and down arrow keys to the right of the listed records to arrange the records as you wish to see them ordered in the generated report. Records can be removed by clicking **Clear Selected Record** or **Clear All**.

Figure 42: Report Builder Tools



5. When a record is selected, a preview of the report is seen at the bottom of the Report Builder.

Figure 43: Report Preview from the Report Builder



6. Click **Build** to generate a report in PDF format.
7. When prompted, click **Print** in the Printable PDF Ready dialog box. The generated report appears in an additional tab within the browser window.
8. Save the report file to your local system using onscreen tools, if desired.

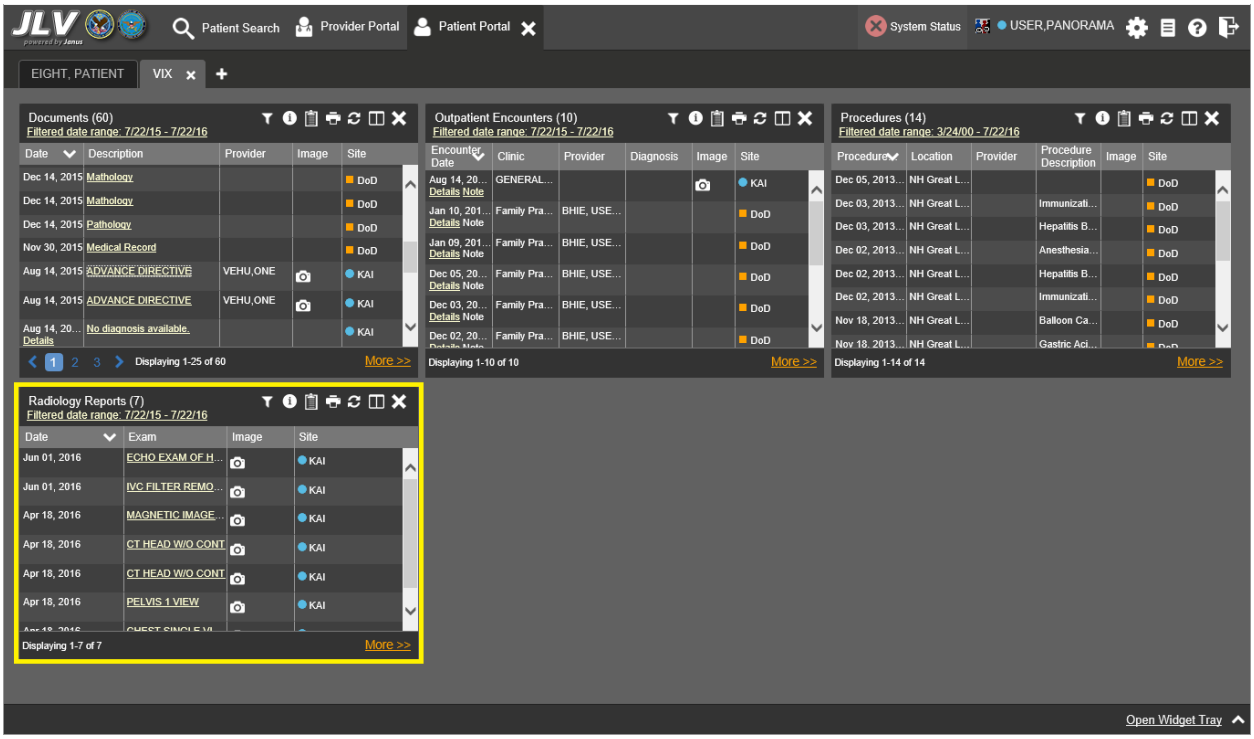
NOTE: Each report created through JLV will include the following disclaimer: *The information contained in this transmission may contain privileged and confidential information, including patient information protected by federal and state privacy laws. It is intended only for the use of the person(s) named above. If you are not the intended recipient, you are hereby notified that any review, dissemination, distribution, or duplication of this communication is strictly prohibited. If you are not the intended recipient, please contact the sender by reply email and destroy all copies of the original message.*

4.6 JLV Integration with VistA Imaging Viewer

JLV integrates the VistA Imaging Viewer into the JLV GUI, allowing VA access to VA imaging artifacts from within JLV widgets for supported clinical domains.

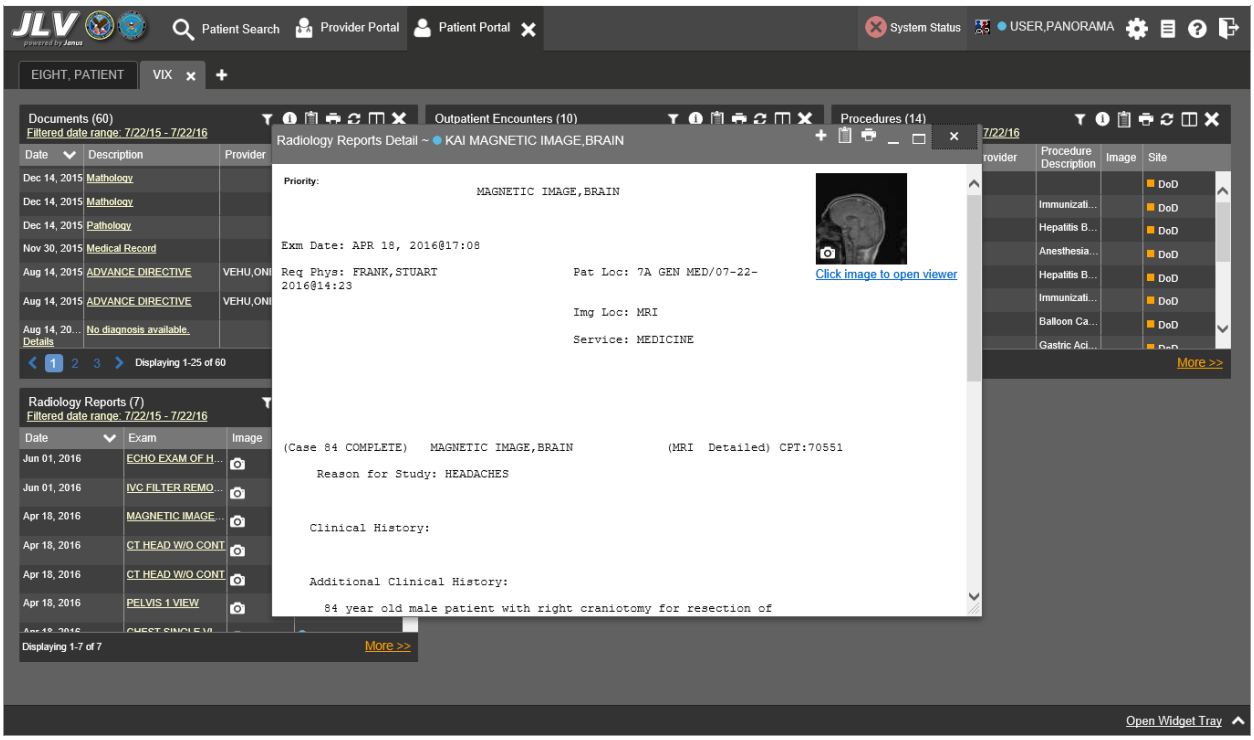
A **camera** icon in the Image column of the Documents, Outpatient Encounters, Procedures, Radiology Reports widgets indicates that one or more images are associated with that record. Clicking the **camera icon** from the **JLV** widget will open the VistA Imaging Viewer in a standalone window and display the associated image(s).

Figure 44: Camera Icon in Image Column



When a record contains one or more images, the Details view accessed from the widget will display one thumbnail in the top-right corner of the window. Below the thumbnail, a **Click image to open viewer** link will also display. Clicking the **thumbnail** or the **link** will also open the VistA Imaging Viewer in a standalone window and display the associated images.

Figure 45: Detail View with VistA Imaging Integration



4.7 Other On-Screen Elements

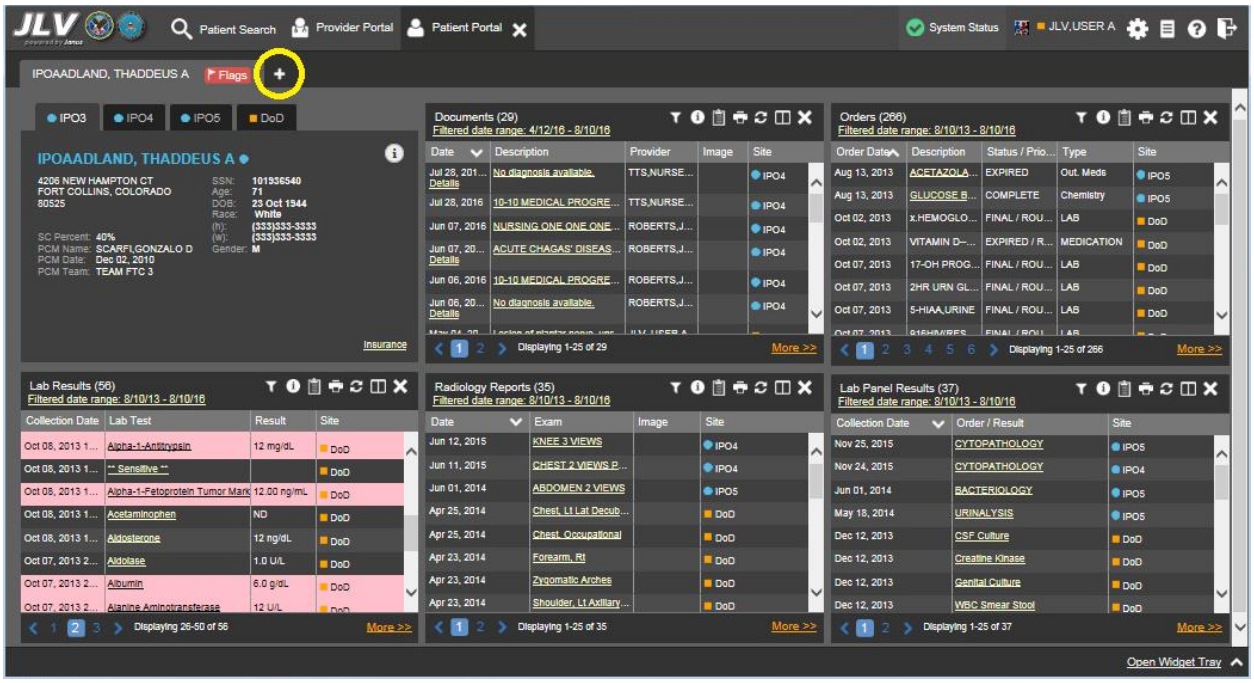
4.7.1 Creating Additional Widget Displays using Custom Tabs

For ease of use and quick reference, you can use the tabs function to create additional widget configurations on the portal.

To set up a customized tab:

1. Click the tab with the plus sign + in the upper-left corner of the screen (as shown in the following figure).
2. In the **Add Tab** dialog box, type in the name of the new tab and click **OK**.

Figure 46: Add New Tab from Patient Portal



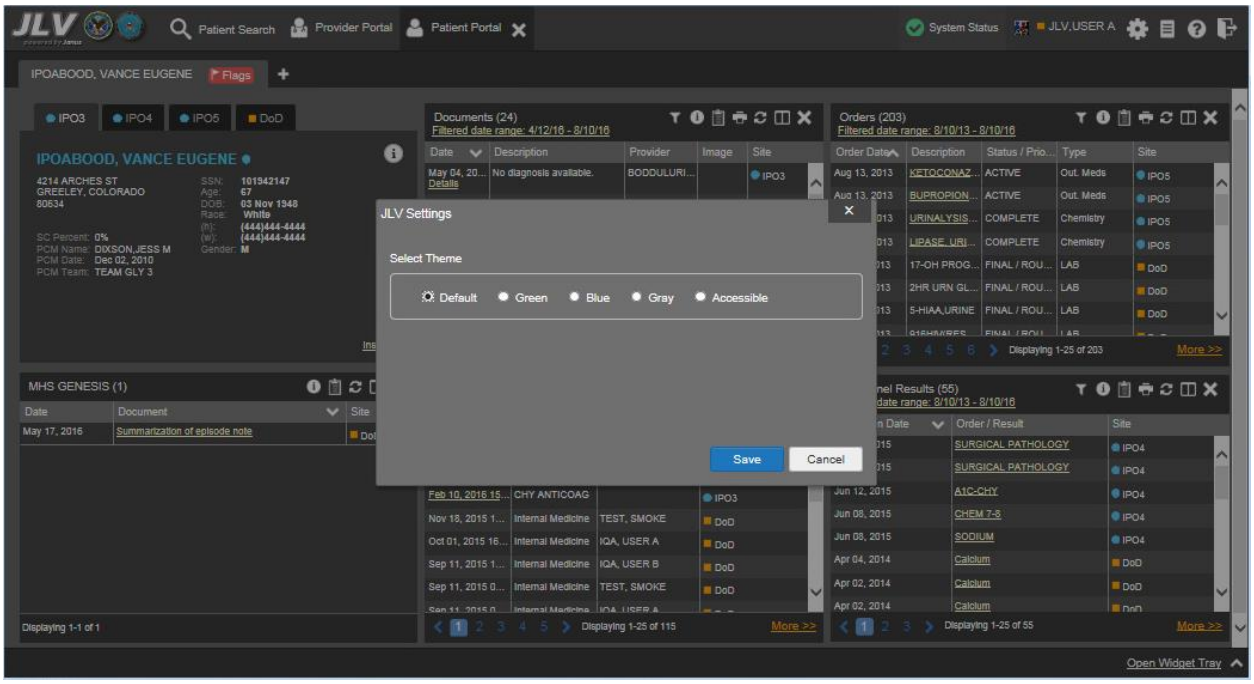
3. Within the new tab space, you can access the widget tray and left-click and drag the widgets to the screen.
4. Click between tabs at any time without losing any of the widget configurations created in the tabs. Tabs are also persisted when a patient change is made.

4.7.2 Setting User Interface Themes

The User Interface Theme is a part of your user profile. You can specify the theme (the on-screen color display) using **User Configuration Settings**. To customize the onscreen theme (colors), click the **cog wheel** in the upper-right corner of the Patient Portal screen.

You can also specify the user interface theme from the login pages. For more information, refer to Section 3.2.3,Setting User Interface Theme.

Figure 47: VA User Settings Accessed through the Cog Wheel on the Portal Page



The User Configuration dialog box includes options for user interface color themes. The color themes are:

- Black Background (Default)
- Green
- Blue
- Gray
- Accessible

NOTE: You can view sample user interface themes in Section 3.2.3, Setting User Interface Theme.

After selecting a theme, click **Save.** After you select a theme and click **Save**, you are asked whether or not to save the configuration. Click **Yes** to reload the application and to apply the settings. Click **Cancel** to exit and restore to the previous theme.

The **Accessible** selection supports Federal accessibility requirements and Section 508 compliance. Refer to Section 4.8, Setting up the JLV Web Application for Accessibility for more information.

4.7.3 Interface Status in Demographics

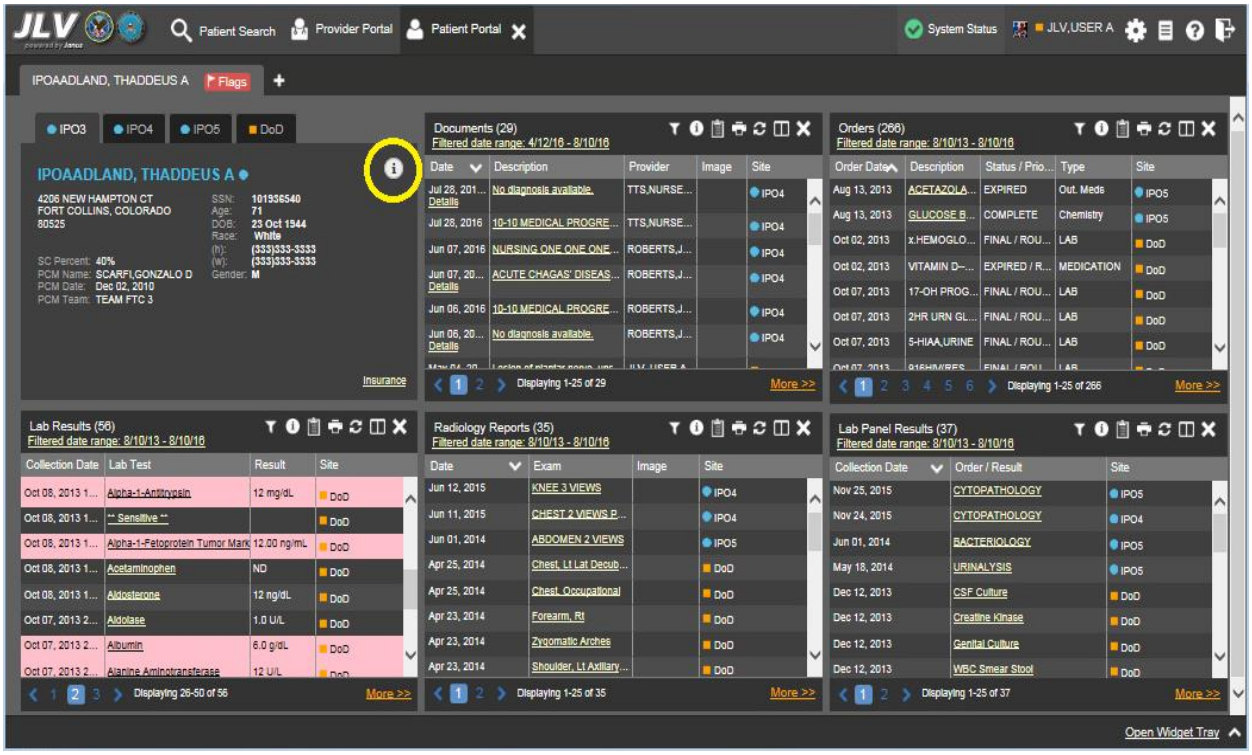
Click **Interface Status** where available within the **Demographics** widget to view interface status information in a standalone window. The window provides status updates for DoD, VA, and community partner sources (VLER). For the status of DoD sources, the entries are derived

from responses received from Data Exchange Services (DES) (formerly referenced as the DoD Adaptor).

The **Demographics** widget includes the **Interface Status** button alongside the display of the patient's personal data/demographics information.

The **Interface Status** ⓘ button placement in the **Demographics** is highlighted in the following figure.

Figure 48: Interface Status Button in Demographics Widget



4.7.4 Viewing Interface Status for Clinical Domains

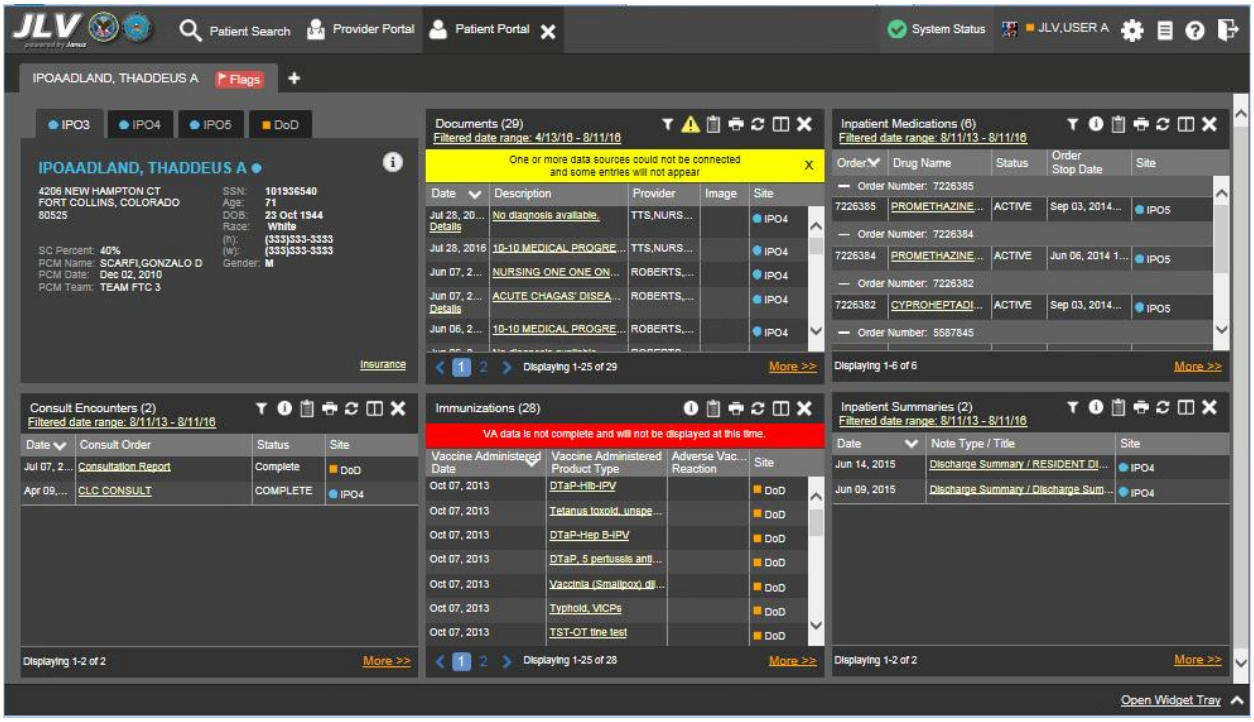
Interface status updates are available for each clinical domain and can be accessed through the widget's toolbar. An icon in the toolbar provides a status indicator for DoD, VA, and community partner data sources. There are two conditions: all sources are connected (available) or one or more sources are not connected (unavailable). The circle with the "i" in the toolbar ⓘ indicates all sources are available. The yellow triangle warning ⚠ indicates one or more data sources are unavailable.

Clicking the **status** icon will open the Interface Status details in a separate window. A yellow banner will also be displayed when one or more sources are unavailable, indicating sources could not be connected and some entries will not appear. Interface status notifications accessed from the widget show connection status at the domain level.

NOTE: Interface status updates are not available from the **Clinical Reminders** widget.

The **Interface Status** warning icon ⚠ and yellow banner with a message indicating one or more sources are unavailable in the **Documents** widget is shown in the following figure. A user can close the banner by clicking the **X** to the right of the message. This action hides the banner during the user session until the widget is closed and re-opened again.

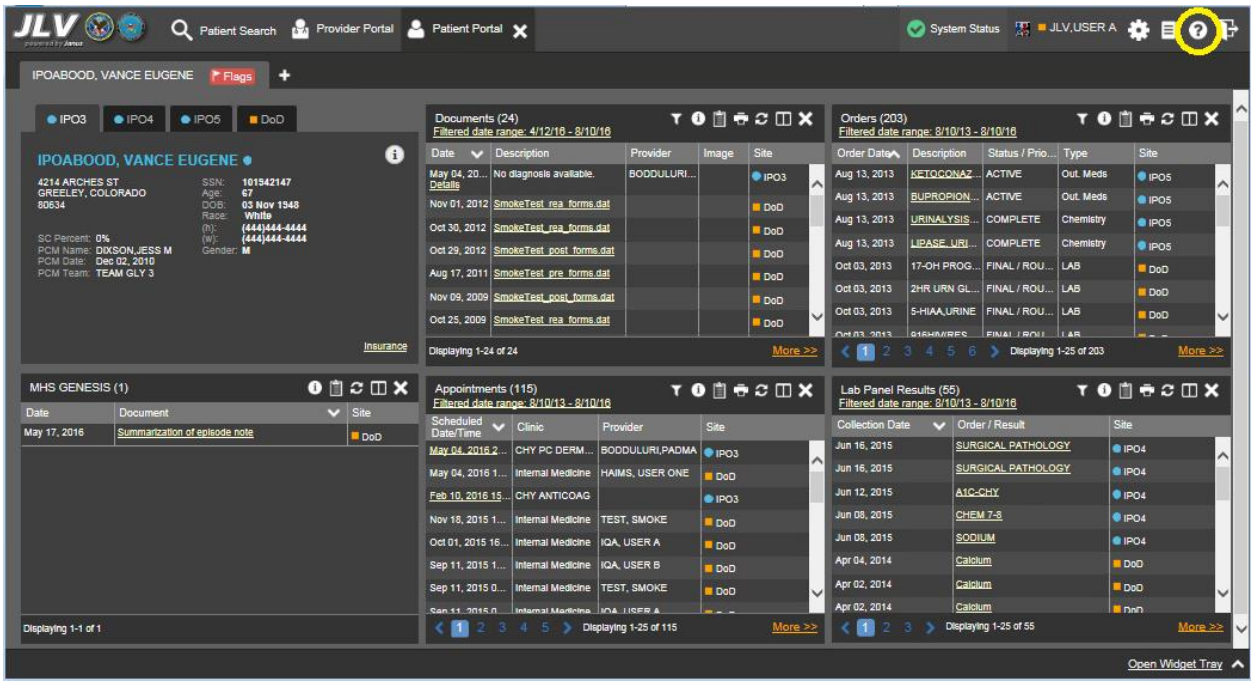
Figure 49: Interface Status Display in Documents Widget



4.7.5 Viewing Online Help

You can view the online help system at any time during an active user session. The help button ❓ is located in the top-right corner of each portal page.

Figure 50: Accessing Online Help



4.8 Setting up the JLV Web Application for Accessibility

You can set up JLV for Section 508 accessibility from the login page or from either portal page after logging in. To set up the page name, theme/colors, and layout of JLV for Section 508 compliance after logging in:

1. Click the **cog wheel** ⚙ in the upper-right corner of the Patient Portal screen.
2. From the **User Configuration** dialog box, select **Accessible** and click **Save**.
3. After clicking **Save**, click **Yes** to reload the application and to apply the settings. Click **Cancel** to exit and restore to the previous theme.

The figures provided in Section 3.2.3, Setting User Interface Theme as well as the figures included in this section provide examples of the Accessible user interface theme.

4.8.1 Keyboard Focus and Screen Navigation

Keyboard focus is the highlighting of on-screen elements that enables interaction with and navigation of the web application through the keyboard and keystrokes. The user interface item which currently has keyboard focus will be outlined. The JLV web application uses a gold colored border or outline as a visual indicator of what element currently has keyboard focus.

4.8.1.1 Keyboard Shortcuts

JLV enables the use of Windows keyboard shortcuts (i.e., Tab, Shift + Tab, arrow keys, Enter, etc.) and other keystrokes to move the focus to and activate all menus and functions. All user interface items are accessible via the keyboard under the Accessible theme.

Generally, pressing Enter when an element that provides action is in keyboard focus will perform the associated action. For example, pressing Enter when the Settings button is in keyboard focus on the Portal screen will open the User Configuration dialog box. Using arrow keys or the Tab key allow a user to move between keyboard focus to navigate through on-screen elements.

Table 9: Accessible Theme Keyboard Shortcuts (Application and Portal Navigation)

Keystroke	Description
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 focused on a widget, press the arrow keys to change page viewing in a widget's data table. When keyboard focus is on a drop-down list, press the down arrow to view the contents.
Ctrl + r	When working with the Report Builder, place keyboard focus on a record in a widget and then press Ctrl + r to add the record to the Report Builder tool.

Table 10: Accessible Theme Keyboard Shortcuts (Tab Panels)

Keystroke	Description
Arrow Keys	Use the left and right key buttons to change tab panels. To add a tab panel, press the right key until the last tab with a plus sign + is selected. A dialog will prompt for the tab name. To close a tab, focus on the tab panel and press Ctrl + x.

Table 11: Accessible Theme Keyboard Shortcuts (Windows or Dialog Boxes)

Keystroke	Description
TAB	Press the TAB key to move the keyboard focus to other user interface items within the window.

Table 12: Accessible Theme Keyboard Shortcuts (Adding Widgets to the Onscreen Portal)

Keystroke	Description
SHIFT + (Number position)	To add a widget from the widget tray using keystrokes: 1. First determine which column (1, 2, or 3) to place the widget onscreen. 2. Focus the desired widget icon from the widget tray and press the SHIFT key along with the 1, 2, or 3 key, depending on the column chosen.

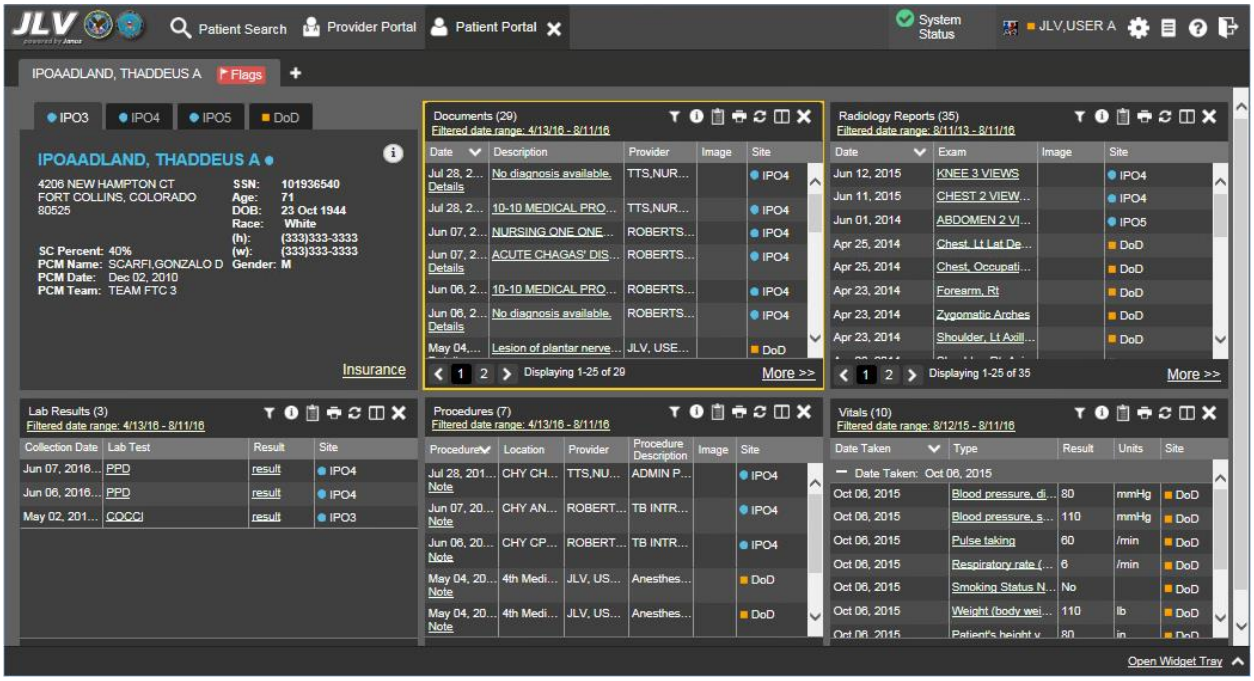
4.8.1.2 Screen Navigation

In the JLV web application, an element with keyboard focus allows a user to move from element to element in the Patient Portal and onscreen dialog boxes using the **Tab** key or arrow keyboard

buttons. Subsequently pressing the **Enter** key when a screen element or button has keyboard focus mimics a mouse click.

In the following figure, the **Documents** widget has keyboard focus. A user can change the focus by pressing the **Tab** key. In this example, pressing the **Tab** key would shift the keyboard focus from the **Documents** widget to the **Procedures** widget (placed below the **Documents** widget in this sample figure). Pressing the **Tab** key again would shift the keyboard focus to the **Radiology Reports** widget, as in this configuration, there are no widgets placed below the **Procedures** widget.

Figure 51: On-screen Navigation Using Elements with Keyboard Focus

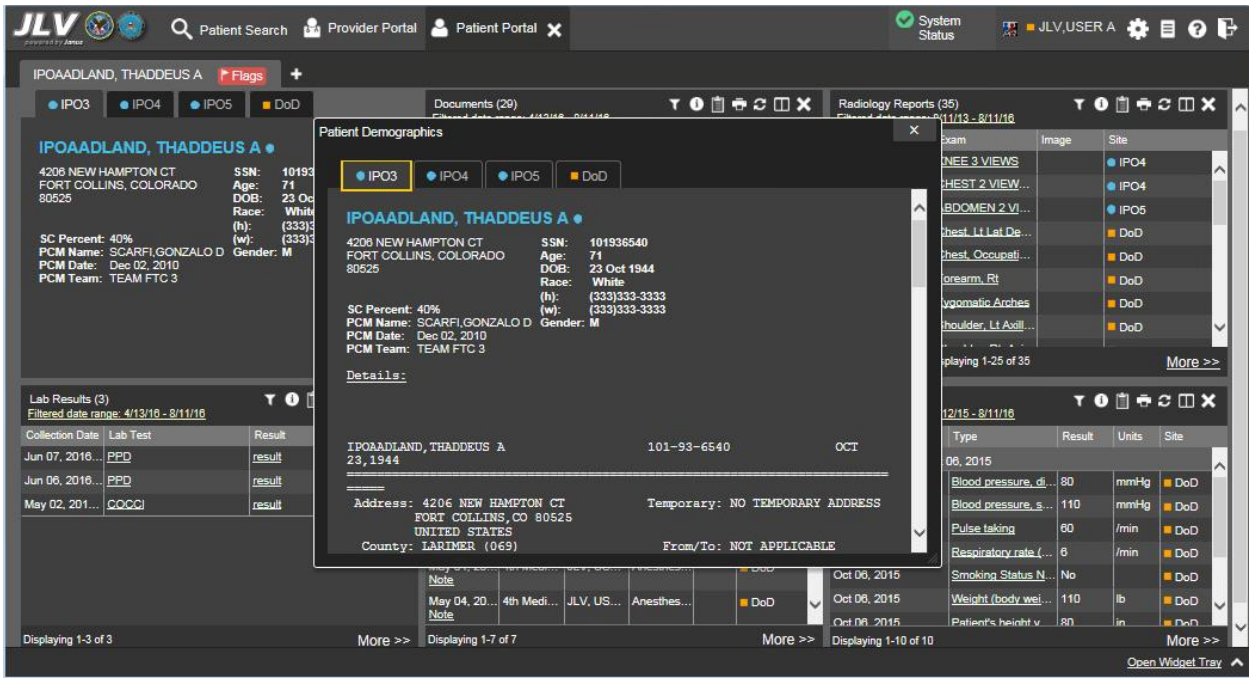


In the next figure, the **IPO3** tab of the Patient Demographics Details window has keyboard focus. A user can jump to the next tabs (**IPO4, IPO5,** or **DoD**) using **arrow** keys to jump to the **VA** tab, or alternately, press **Tab** until keyboard focus is on the **Close** button **X**, press **Enter** to close the window.

When the patient's name has keyboard focus, use the **up** and **down** arrow keys to scroll through the contents of the window.

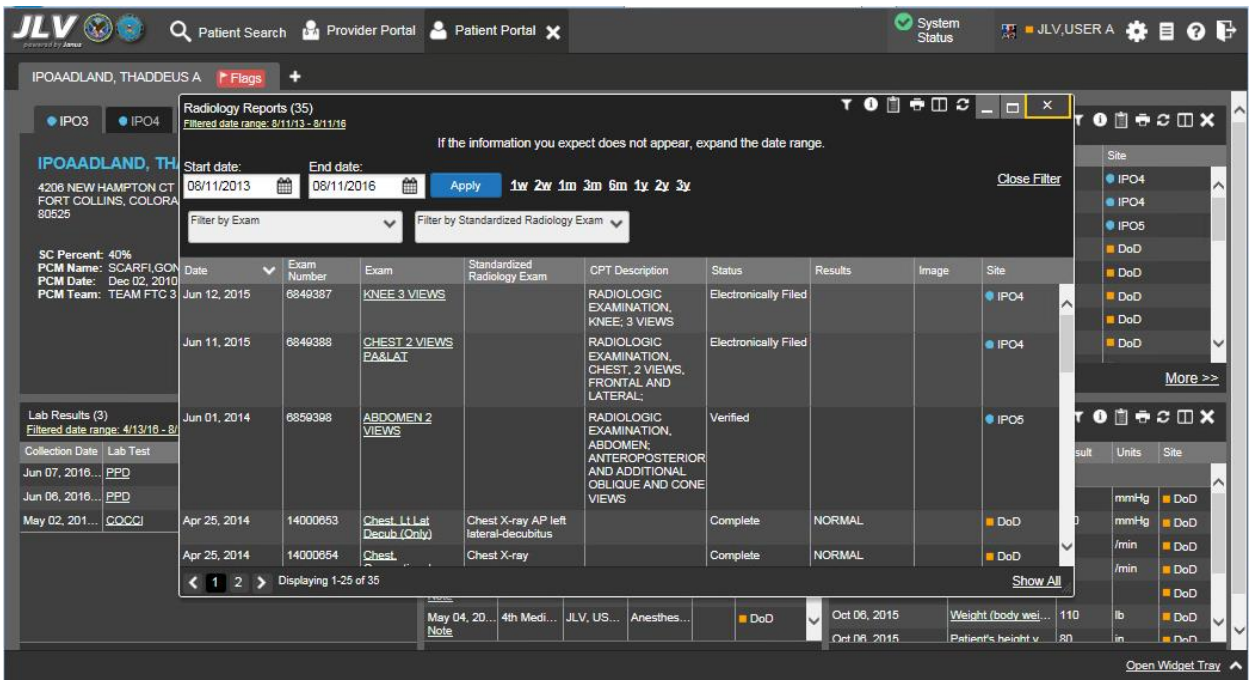
NOTE: To view hover text where available in the JLV interface (such as terminology normalization in supported widgets), focus on the element within the widget that has hover text. After a small delay, the text will appear as if the user hovered over the element with a mouse cursor.

Figure 52: Window Tab with Keyboard Focus



After closing the window, keyboard focus returns to the last element that had keyboard focus before opening the window.

Figure 53: Window Close Button with Keyboard Focus



4.9 Patient Portal Data Displays

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

NOTE: Users can configure the layout of widgets on the Patient Portal and create multiple widget tabs as described in Section 4.2, Widgets, and Section 4.7.1, Creating Additional Widget Displays using Custom Tabs. Configurations will persist to the JLV Database. When you log in to the system in the future, the last configuration utilized will display.

4.9.1 Viewing Patient Flags and Alerts

If the patient has one or more clinical warnings, alerts, or flags in his/her record from VA and DoD sites, a **Flag** button will display next to the Patient Name tab (above the **Demographics** widget) on the Patient Portal (as shown in the following example).

Click **Flags** to open the Patient Flags and Postings window that displays a list of alerts and flags within the patient's record. If the patient's record does not contain any clinical warnings, the button will not display onscreen.

Figure 54: Flags Button in Patient Demographics

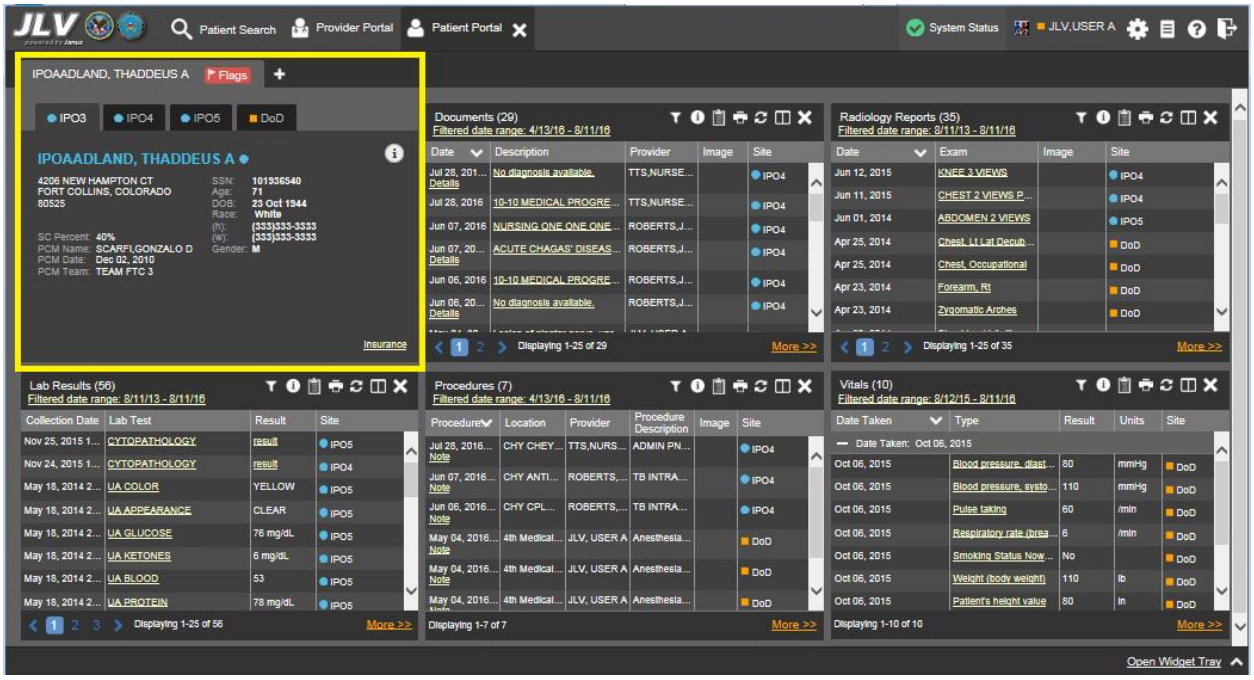
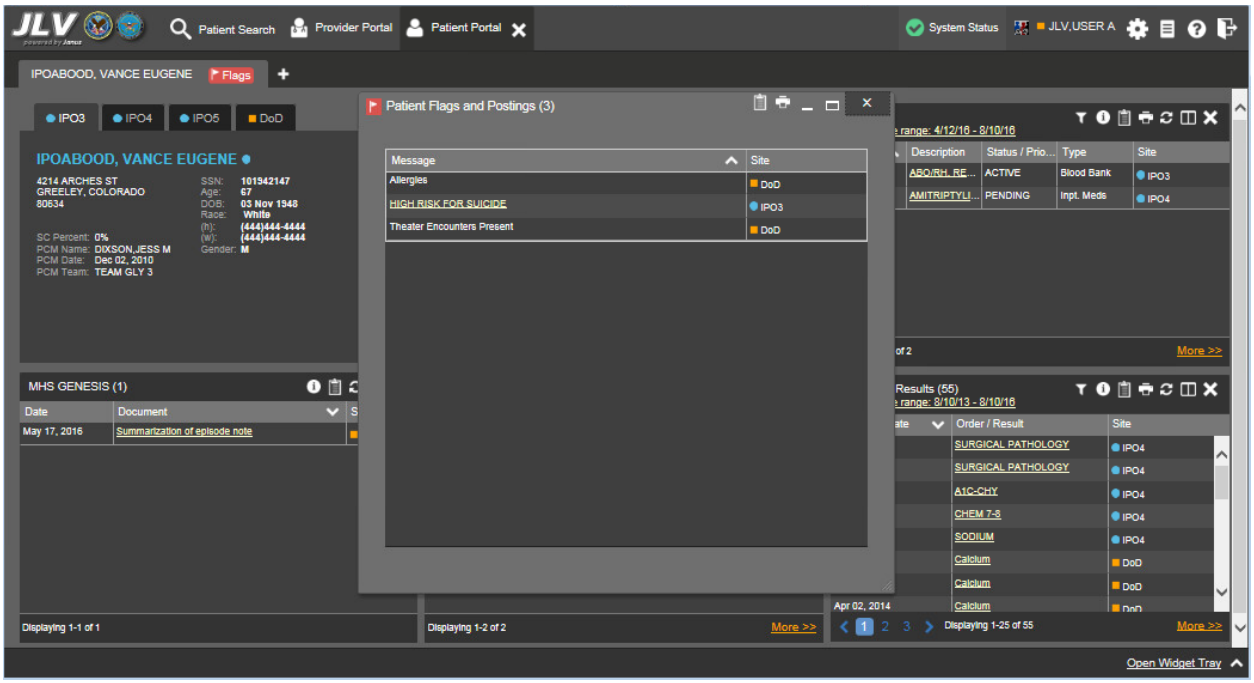


Figure 55: Sample Patient Flags and Postings Window



4.9.2 Patient Demographics

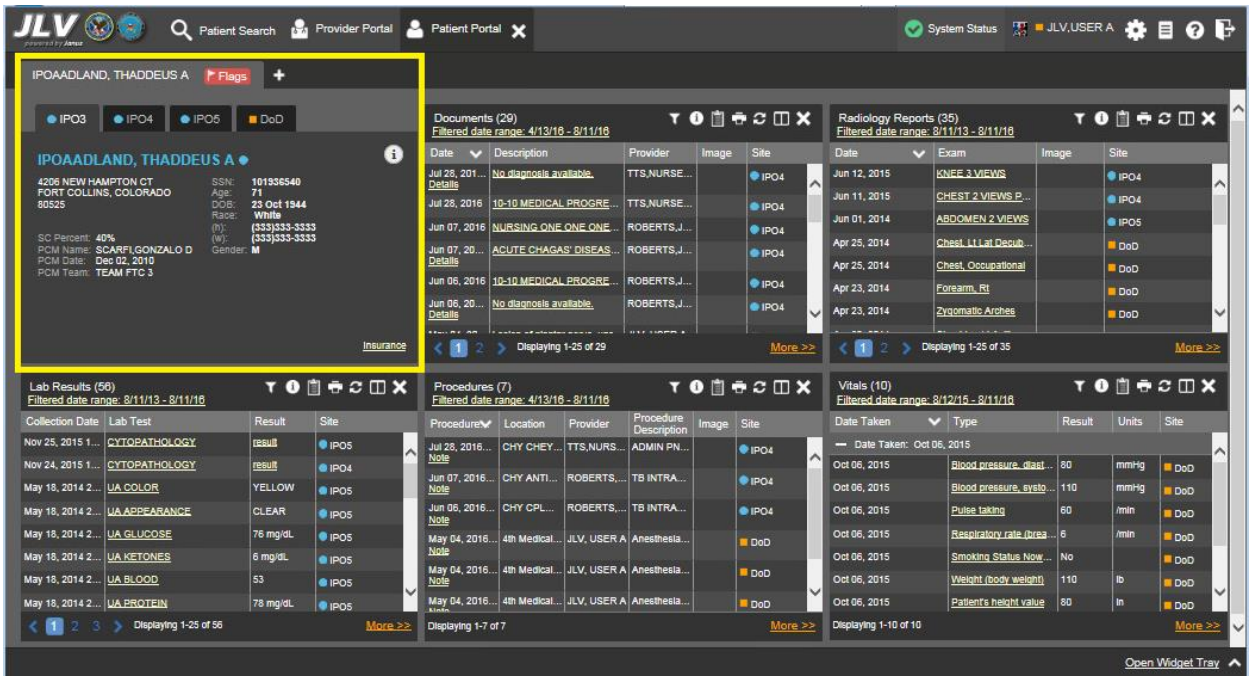
A summary of the patient's demographics (personal data) appears in the upper-left section of the Patient Portal (sample shown in the following figure). The tabs above the patient's name provide the patient's demographics summary for each DoD or VA site the patient has visited.

As seen in the next figure, the patient's name is displayed in color and followed by an icon:

- The blue font color and a blue circle represent data retrieved from a VA system.
- The orange font color and an orange square represent data retrieved from a DoD system.
- A purple hexagon represents data retrieved from VLER sources.

You can also click the user's name to open a separate window that provides patient demographics details.

Figure 56: Patient Demographics on the Patient Portal



4.9.2.1 DoD Patient Demographics

The **Demographics** widget contains various DoD-only elements in a DoD tab:

- Patient's rank and FMP (Family Member Prefix) index.
- Emergency contact and next of kin information.
- DoD Sharing Status represents a DoD patient's choice to share DoD health care data to community partners Health Information Exchange (HIE). If the patient has opted out, the entry will display *DoD Sharing Status: Opted Out (M DD, YYYY)*. If the patient has opted in, the status will be blank and the Sharing Status label will not be displayed.

Click the user's name within the **Demographics** widget to open a separate window that provides patient demographics details.

4.9.2.2 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. Click the **Insurance** link in the **Demographics** widget to open a separate window with a detailed list of insurance information for the patient.

Insurance information includes:

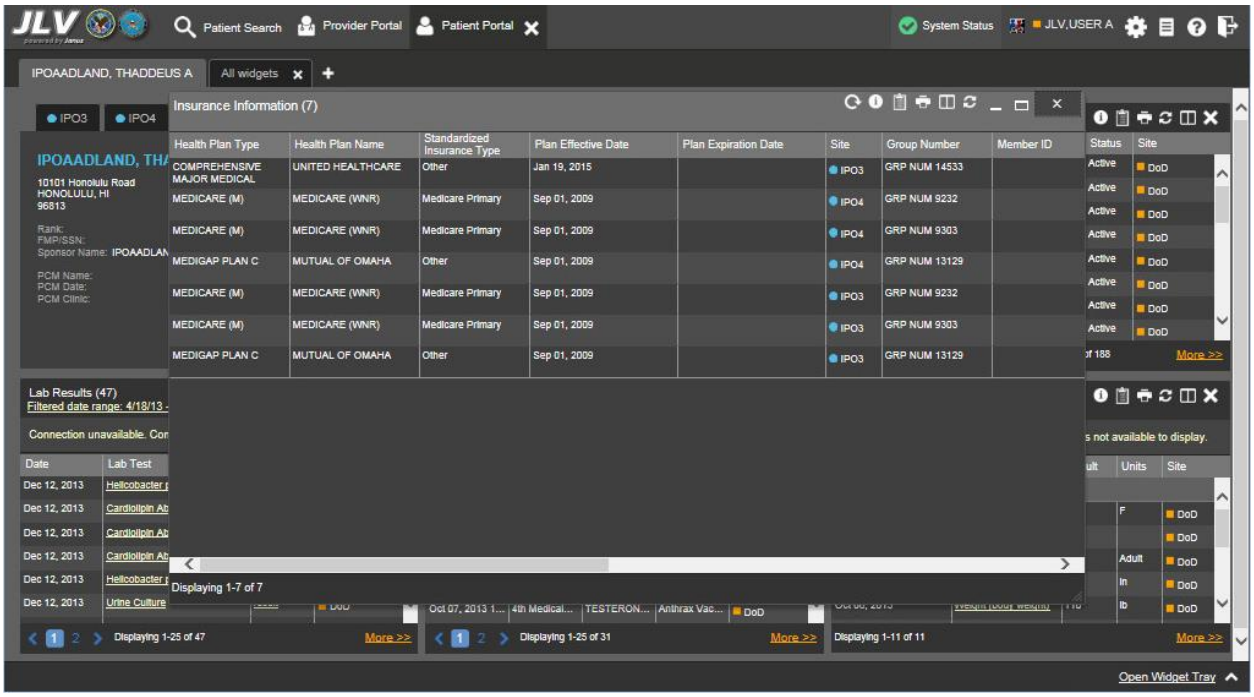
- Health Plan Type
- Health Plan Name
- Standardized Insurance Type
- Plan Effective Date
- Plan Expiration Date

- Site
- Group Number
- Member ID
- Subscriber ID
- Subscriber Date of Birth
- Subscriber's Relationship to Insurer
- Health Plan Mailing Address
- Health Plan Contact Information

Use the **Insurance Information** window's horizontal scroll bar to view additional columns not seen within the default window size.

In the window, data appearing in the Standardized Insurance Type column is normalized to the X12 Health Insurance Type standard. Hovering over entries in this column will display the standardized name and standardized code for the insurance type.

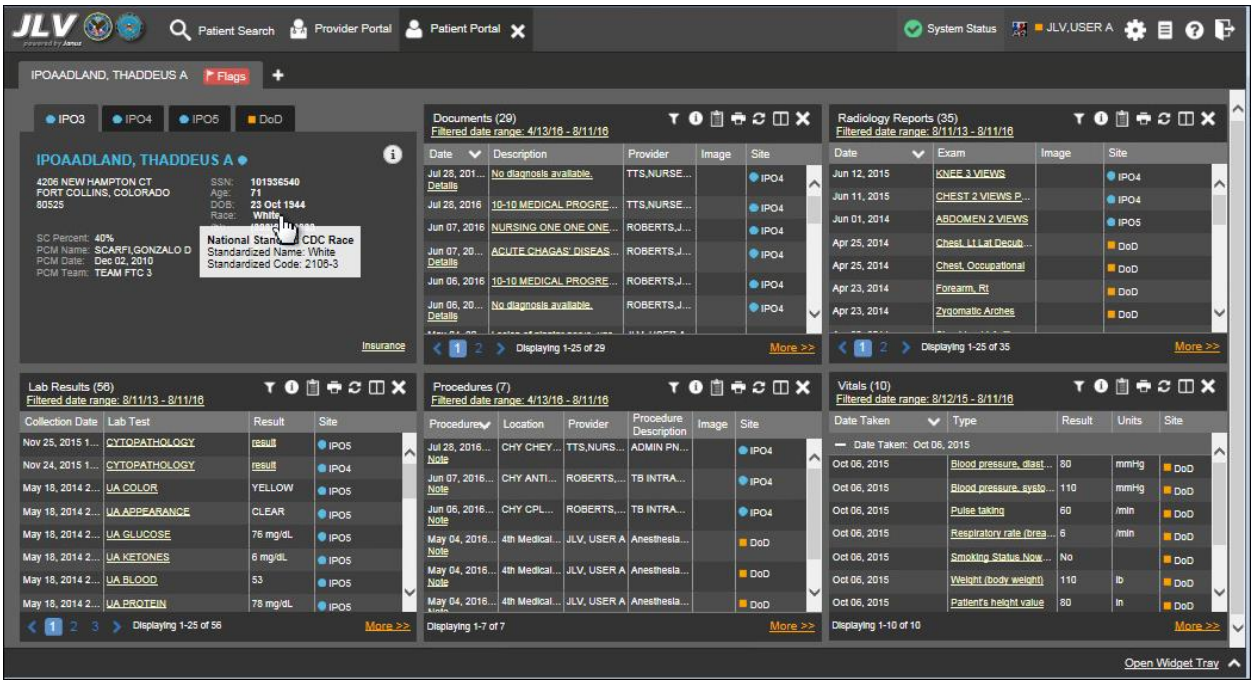
Figure 57: Insurance Information



4.9.2.3 Race Data Terminology Normalization

Race data from DoD and VA sources appearing in the Demographics summary will be normalized. Hovering over the Race field will display the standardized name and standardized code for the race classification, normalized to the National Standard Centers for Disease Control and Prevention (CDC) Race standard.

Figure 58: Standardized Race Data in the Demographics Widget



4.9.3 Admissions

The **Admissions** widget displays the patient's admissions information. The information is displayed in reverse chronological order by the admission date.

To open the widget, left-click **Admissions** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

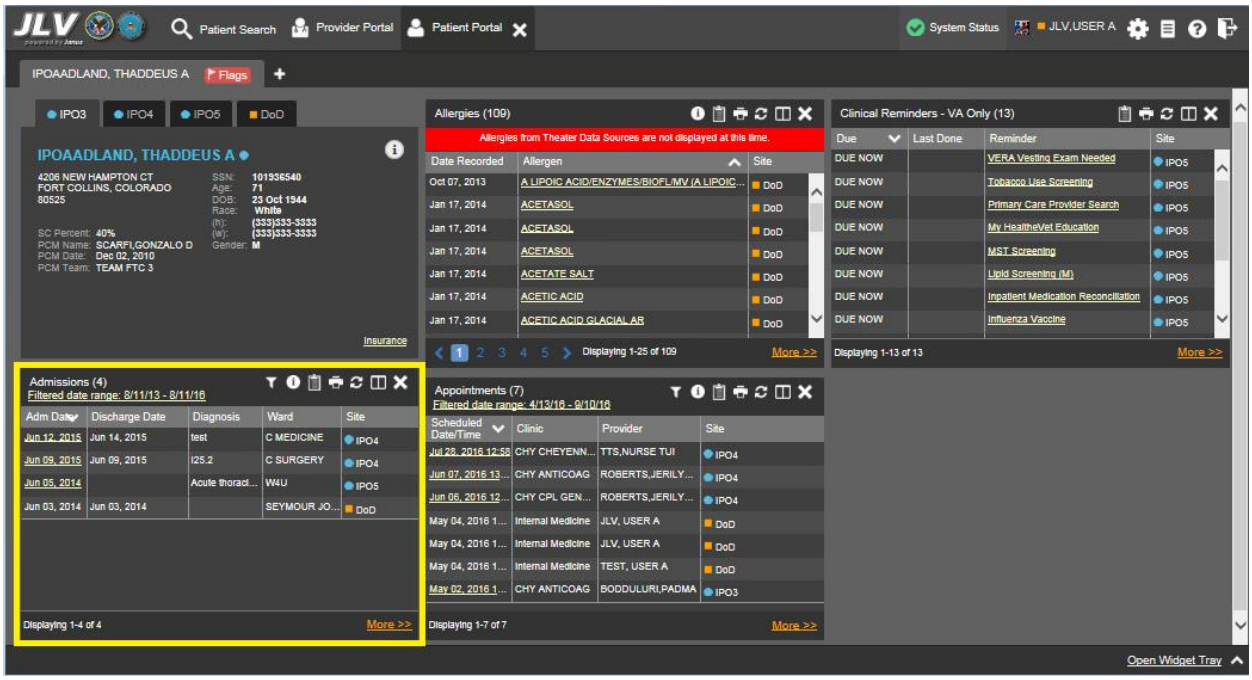
4.9.3.1 Admissions Widget Data

In the minimized view of the **Admissions** widget, the admissions information includes:

- Adm (Administration) Date
- Discharge Date
- Diagnosis[1]
- Ward
- Site

[1] The Clinical Data Repository (CDR) does not contain diagnosis data from the admissions domain. Therefore, DoD data will not appear in diagnosis or standardized diagnosis columns of the **Admissions** widget. This only applies to the DoD admissions domain and does not apply to VA admissions diagnosis data or the other clinical domains where diagnosis/standardized diagnosis columns appear in the JLV GUI.

Figure 59: Admissions Widget – Minimized View

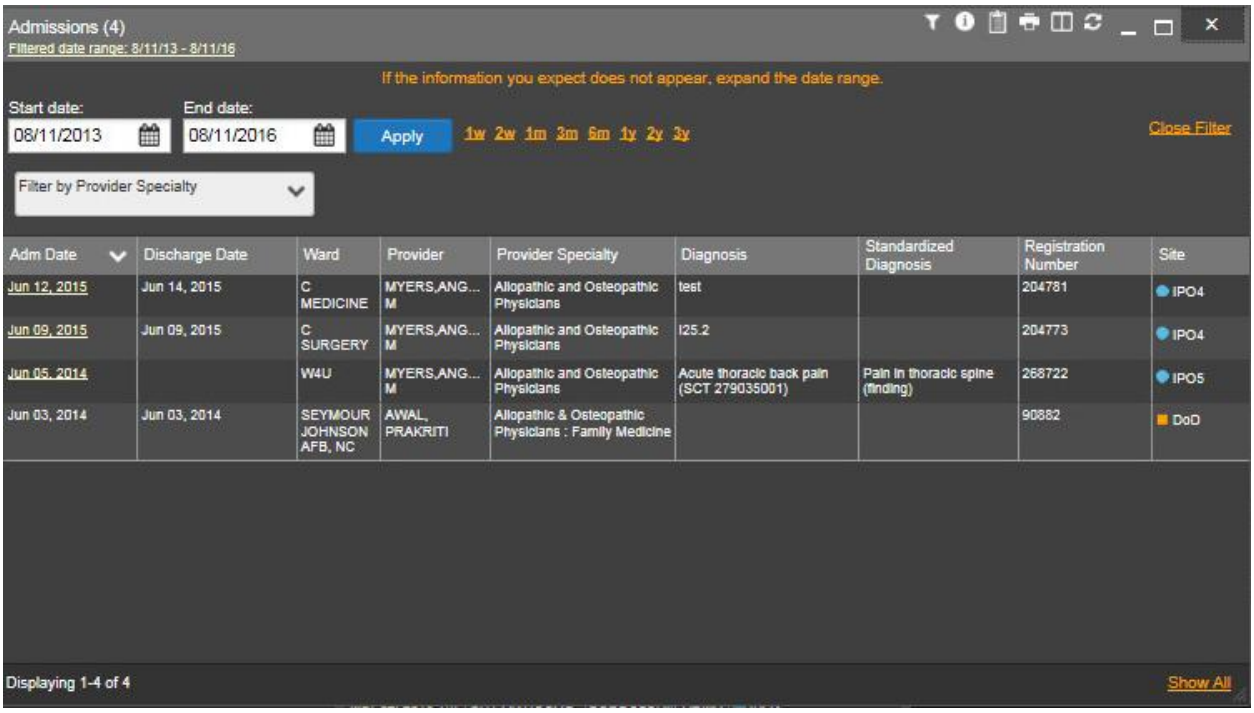


Click **More >>** from the minimized view of the **Admissions** widget to open an expanded view of the widget. In the expanded view, the admissions information includes:

- Adm (Admission) Date
- Discharge Date
- Ward
- Provider
- Provider Specialty
- Diagnosis[2]
- Standardized Diagnosis[2]
- Registration Number
- Site

[2] The Clinical Data Repository (CDR) does not contain diagnosis data from the admissions domain. Therefore, DoD data will not appear in diagnosis or standardized diagnosis columns of the Admissions widget. This only applies to the DoD admissions domain and does not apply to VA admissions diagnosis data or the other clinical domains where diagnosis/standardized diagnosis columns appear in the JLV GUI.

Figure 60: Admissions Widget – Expanded View



4.9.3.2 Display and Filter Options

Display and filter options within the **Admissions** 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.
- Click **Column Settings** ⊟ in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Specify the date range for which records will be 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. When a date range filter is applied in an open widget, the date range is displayed in the widget header. Open or close the filter options by clicking on the date range in the header.
- Use the **Filter by Provider Specialty** drop-down box to re-draw the widget to show only the records for the selected provider type(s).

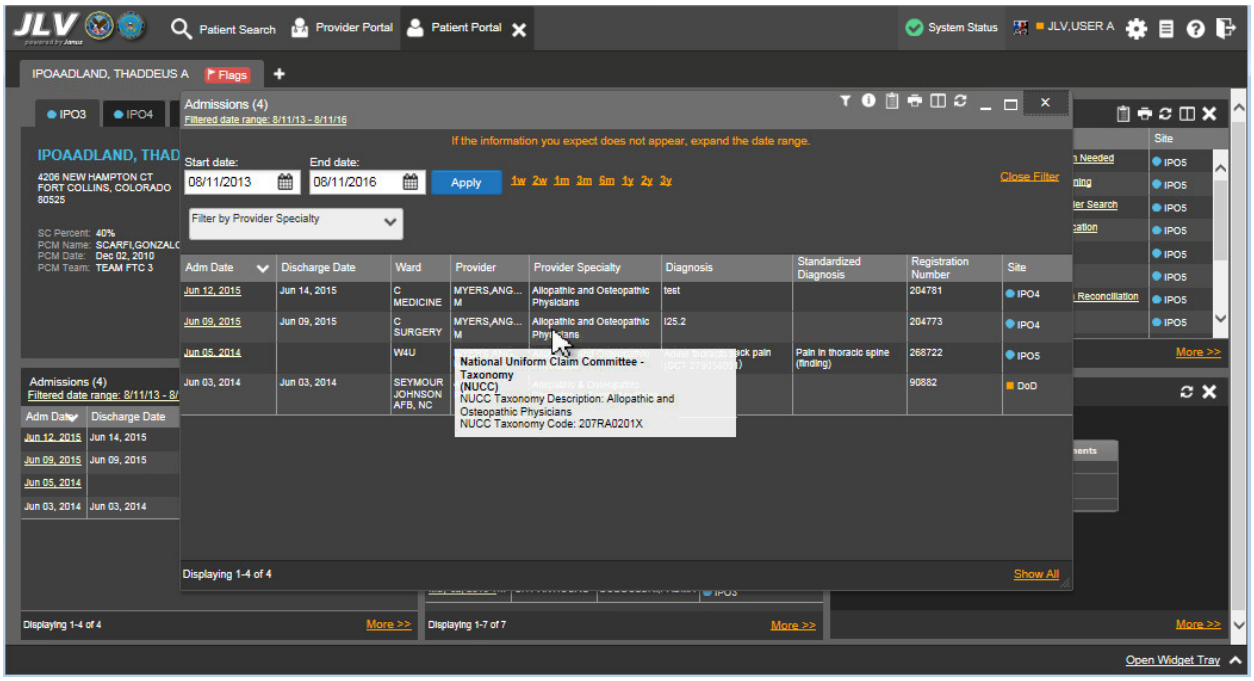
4.9.3.3 Terminology Normalization in the Admissions Widget

Terminology normalization is provided in the **Admissions** widget through the following Graphical User Interface (GUI) elements:

- The data in the Provider and Provider Specialty columns in the minimized and expanded views of the widget are normalized to the National Uniform Claim Committee Taxonomy (NUCC) standard. Hovering over the entries in these columns will display the standardized name and standardized code for the provider.
- The data in the Diagnosis and Standardized Diagnosis columns in the minimized and expanded views of the widget are normalized to the Systematized Nomenclature of Medicine Clinical Terms (SNOMED CT) standard. Hovering over the entries in these columns will display the standardized name and standardized code for the diagnosis.

The following example highlights a provider mapped to the NUCC standard. The standardized name and standardized code are displayed in the hover text over the record in the Provider Specialty column.

Figure 61: Admissions Widget – Terminology Normalization



4.9.4 Allergies

The **Allergies** widget displays the patient's allergies information. To open the widget, left-click **Allergies** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

NOTE: Allergies from Theater Medical Data Store (TMDS) are not displayed in JLV at this time.

4.9.4.1 Allergies Widget Data

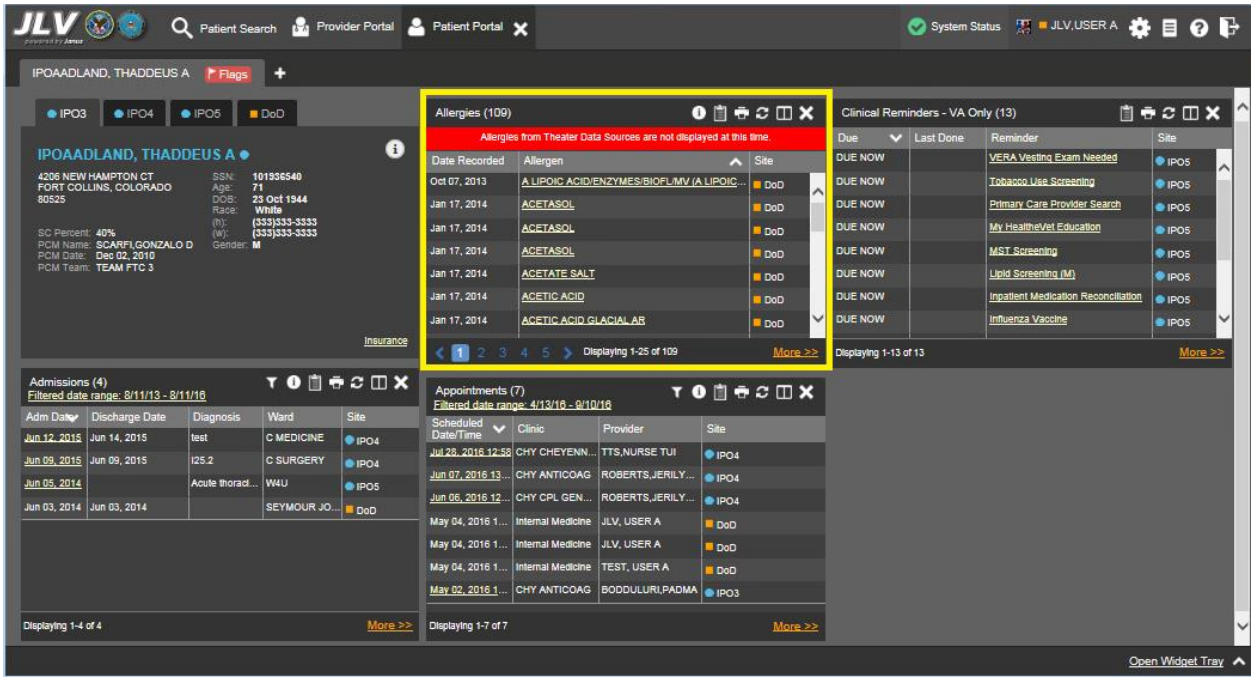
In the minimized view of the **Allergies** widget, the allergies information includes:

- Date Recorded

- Allergen
- Site

Click the column title to sort records according to data in that column. If a user sorts on a column that appears in both minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.

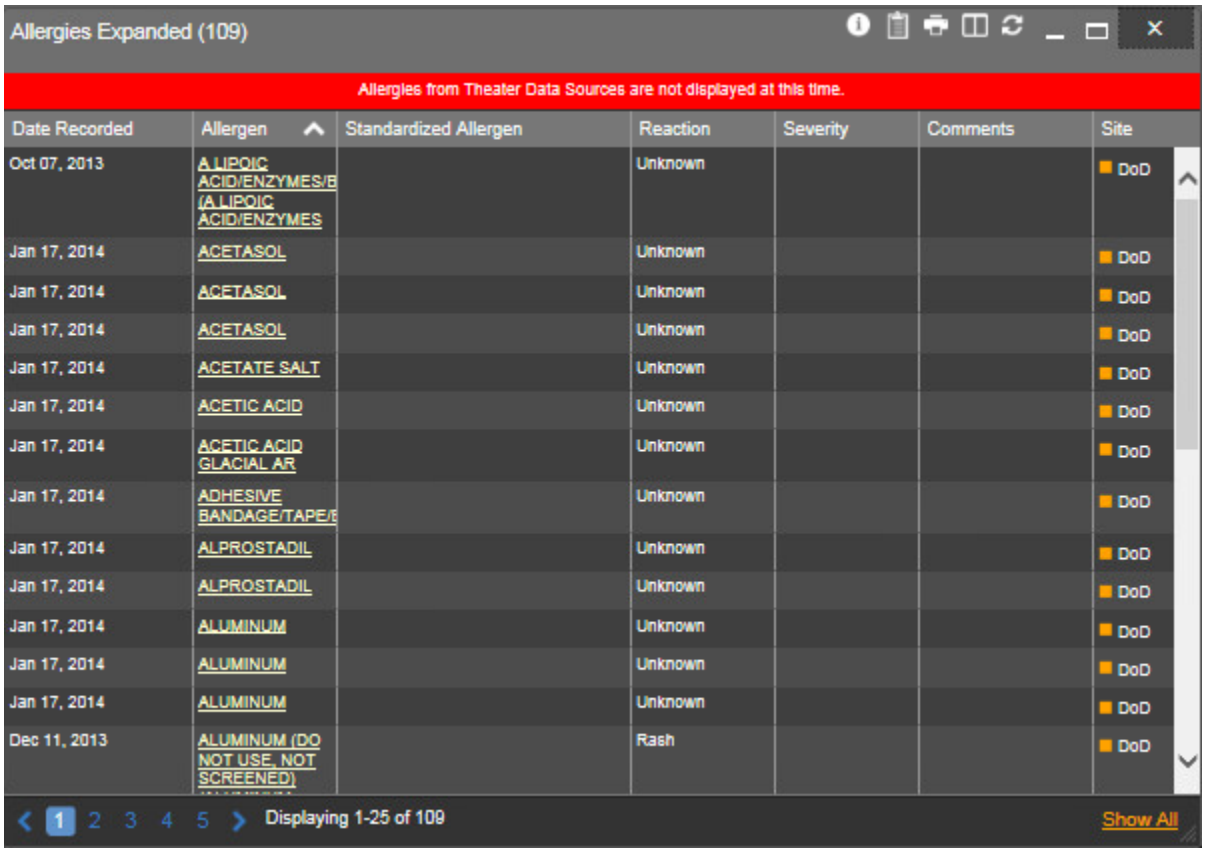
Figure 62: Allergies Widget – Minimized View



Click **More >>** from the minimized view of the **Allergies** widget to open an expanded view of the widget. In the expanded view, the allergies information includes:

- Date Recorded
- Allergen
- Standardized Allergen
- Reaction
- Severity
- Comments
- Site

Figure 63: Allergies Widget – Expanded View

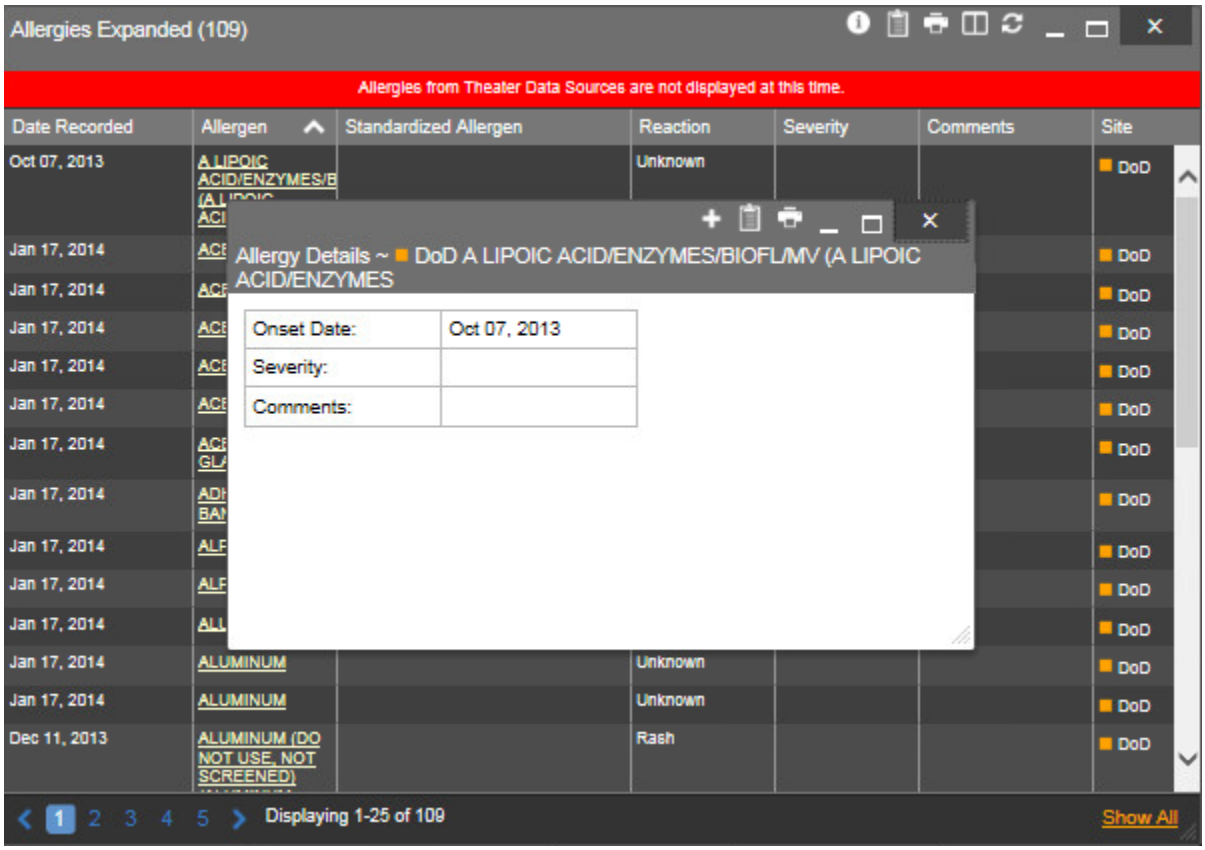


4.9.4.2 Viewing Allergy Details

Click a hyperlinked entry in the Allergen column in either the minimized or expanded views of the **Allergies** widget to open a separate window containing the details of the allergy record. The presentation of data within the secondary window differs slightly, depending on whether the record is a DoD record or a VA record.

The following figure presents a sample details view for a DoD record.

Figure 64: Sample Allergy Details View for DoD Record



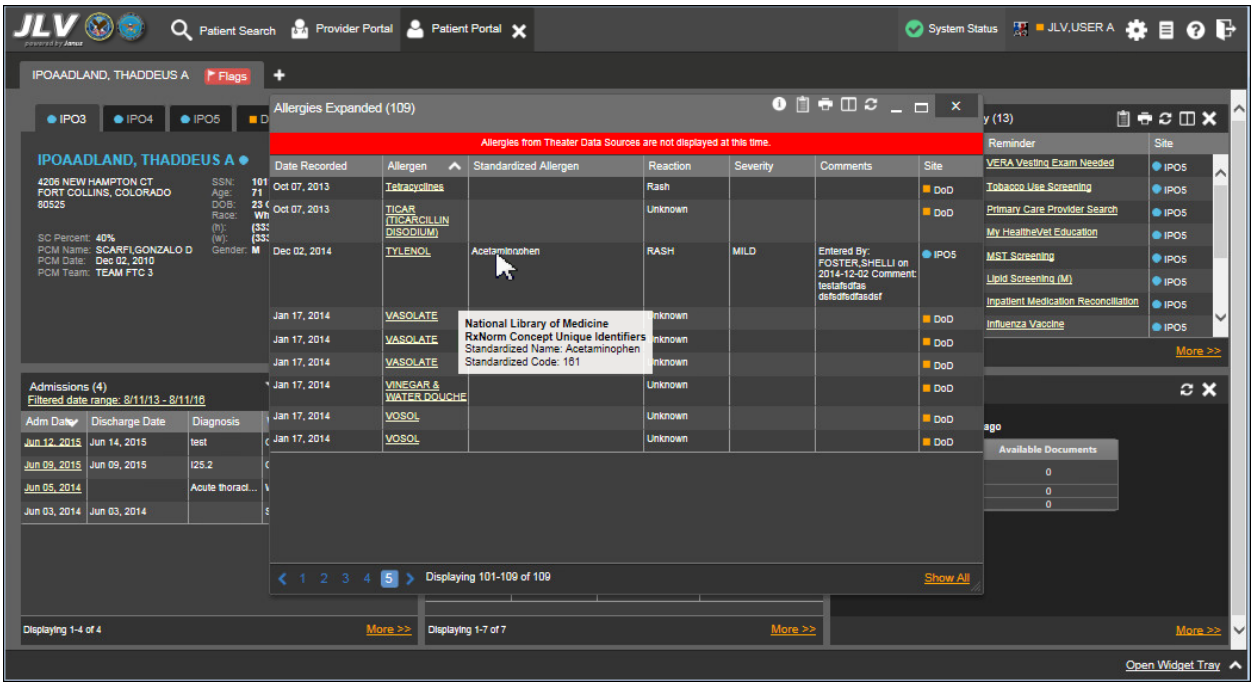
4.9.4.3 Terminology Normalization in the Allergies Widget

Terminology normalization is provided in the **Allergies** widget through the following GUI elements:

- The Allergen column displays allergy information contained in the patient's record. Hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (RxNorm), the standardized allergen name, and the standardized RxNorm code for that allergen.
- The Standardized Allergen column displays the standardized name for the corresponding entry in the Allergen column, mapped to the RxNorm standard. In addition to the standardized name, hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (RxNorm), and the RxNorm code for that allergen.

The following example highlights an allergen mapped to the RxNorm standard. The standardized name and standardized code are displayed in the hover text over the record in the Allergen column.

Figure 65: Allergies Widget – Terminology Normalization



4.9.5 Appointments

The **Appointments** widget displays the patient's appointments information. The information is displayed in reverse chronological order by the appointment date. To open the widget, left-click **Appointments** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

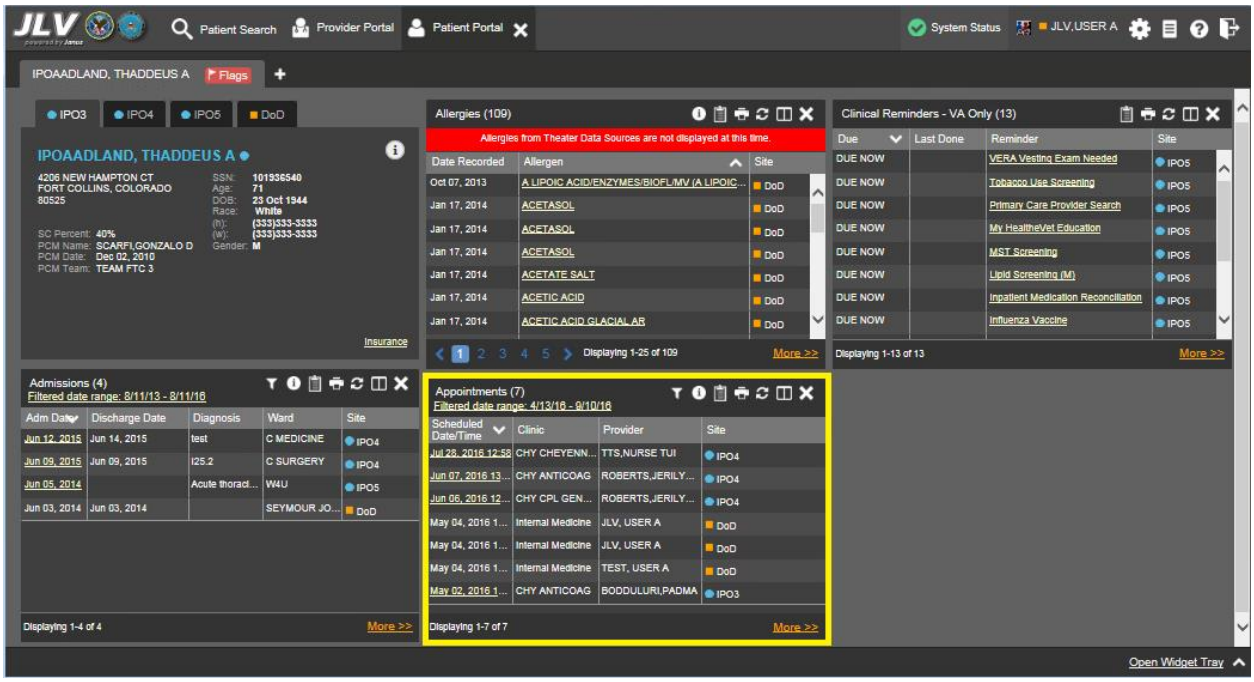
4.9.5.1 Appointments Widget Data

In the minimized view of the **Appointments** widget, the appointments information includes:

- Scheduled Date/Time
- Clinic
- Provider[3]
- Site

[3] Hovering over the Provider column in the minimized and expanded views of the Appointments widget will display the address and phone number for the provider, where available in the patient record.

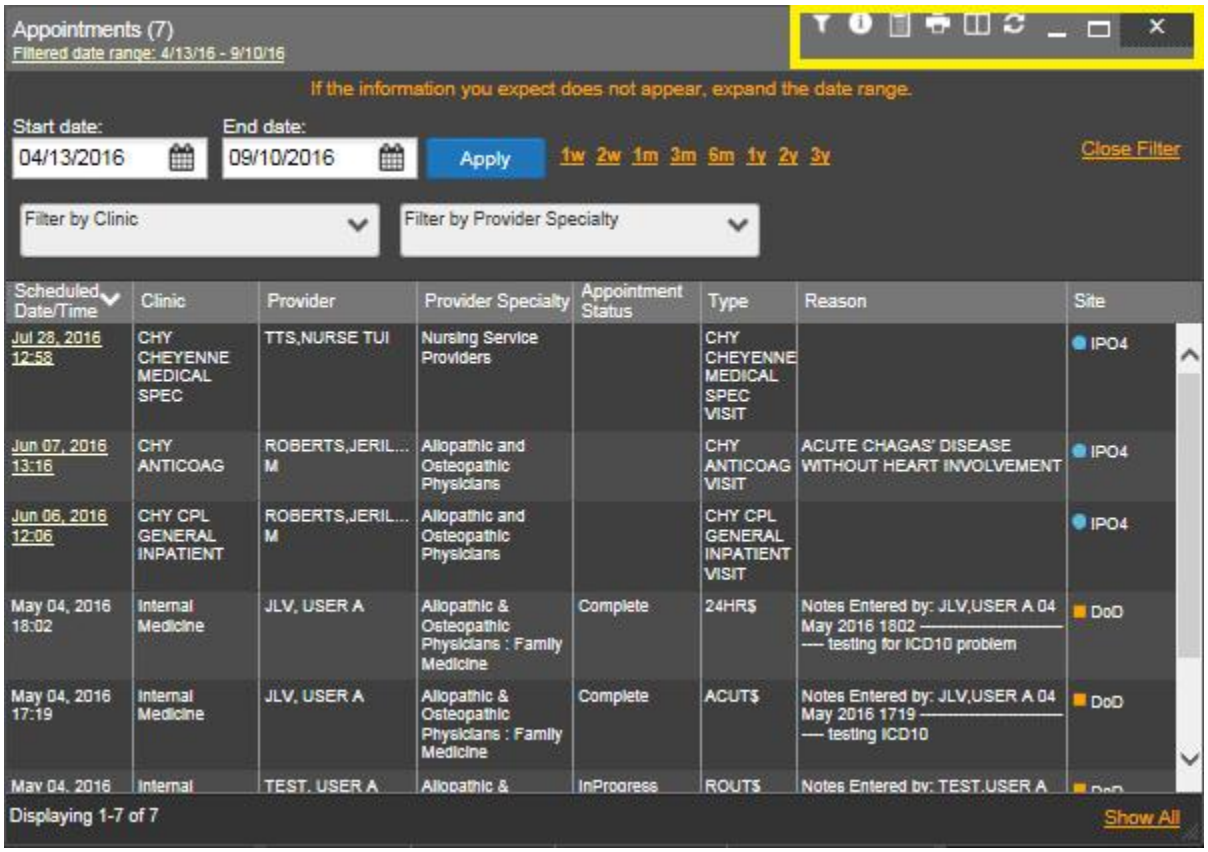
Figure 66: Appointments Widget – Minimized View



Click **More >>** from the minimized view of the **Appointments** widget to open an expanded view of the widget. In the expanded view, the appointments information includes:

- Scheduled Date/Time
- Clinic
- Provider
- Provider Specialty
- Appointment Status
- Type
- Reason
- Site

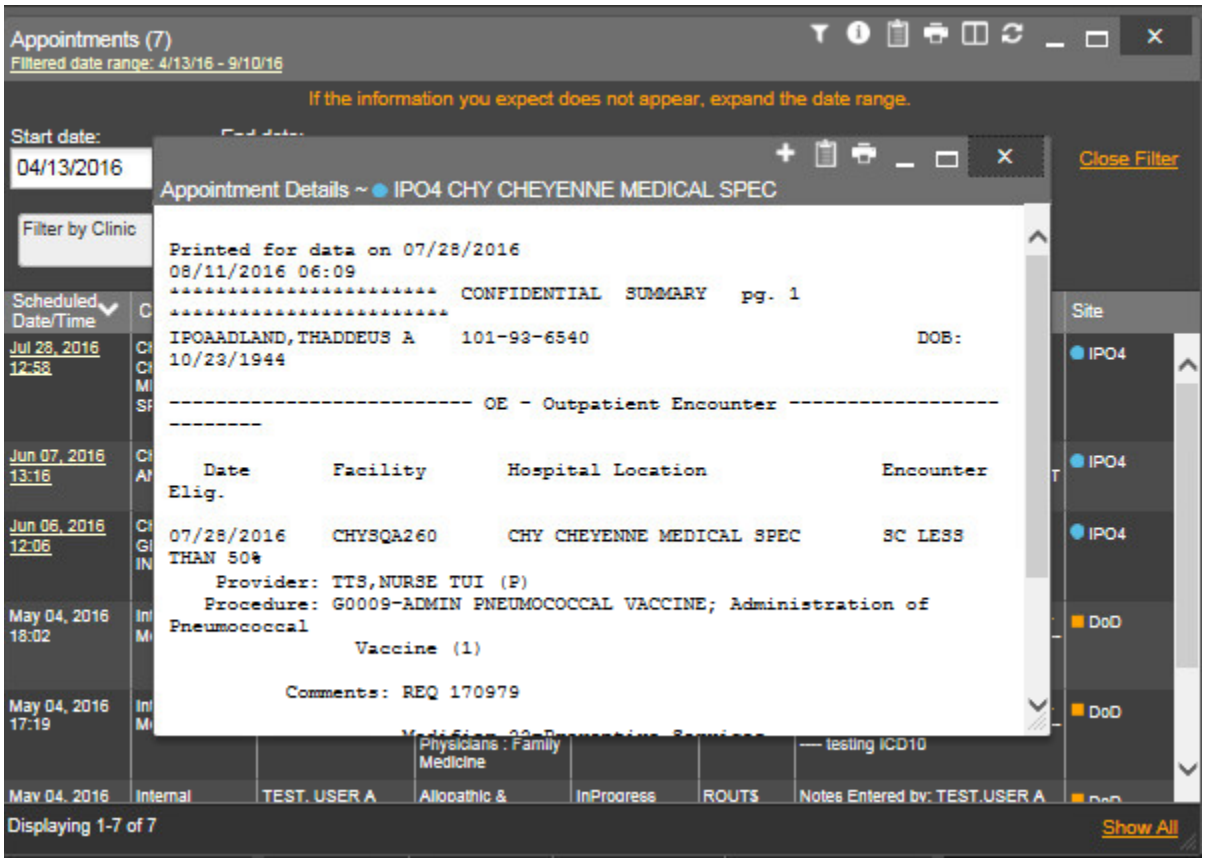
Figure 67: Appointments Widget – Expanded View



4.9.5.2 Viewing Appointment Details (VA-Only)

Where record details are available for a VA appointment, the entry will display a link in the Scheduled Date/Time column. Clicking this link in either the minimized or expanded views of the **Appointments** widget will open a separate window containing the details of the record.

Figure 68: Appointments Widget – VA Record Details



4.9.5.3 Display and Filter Options

Display and filter options within the **Appointments** 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.
- Click **Column Settings** ◫ in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Specify the date range for which records will be 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. When a date range filter is applied in an open widget, the date range is displayed in the widget header. Open or close the filter options by clicking on the date range in the header.
- Use the **Filter by Clinic** drop-down box to re-draw the widget to show only the records for the selected clinic(s).

- Use the **Filter by Provider Specialty** drop-down box to re-draw the widget to show only the records for the selected provider type(s).

4.9.5.4 Terminology Normalization in the Appointments Widget

Terminology normalization is provided in the **Appointments** widget through the following GUI elements:

- The data in the Provider and Provider Specialty columns in the minimized and expanded views of the widget are normalized to the National Uniform Claim Committee Taxonomy (NUCC) standard. Hovering over the entries in these columns will display the standardized name and standardized code for the provider.

4.9.6 Clinical Reminders

The **Clinical Reminders** widget displays the patient's clinical reminders information from VA data sources. The information is displayed in reverse chronological order by the due date.

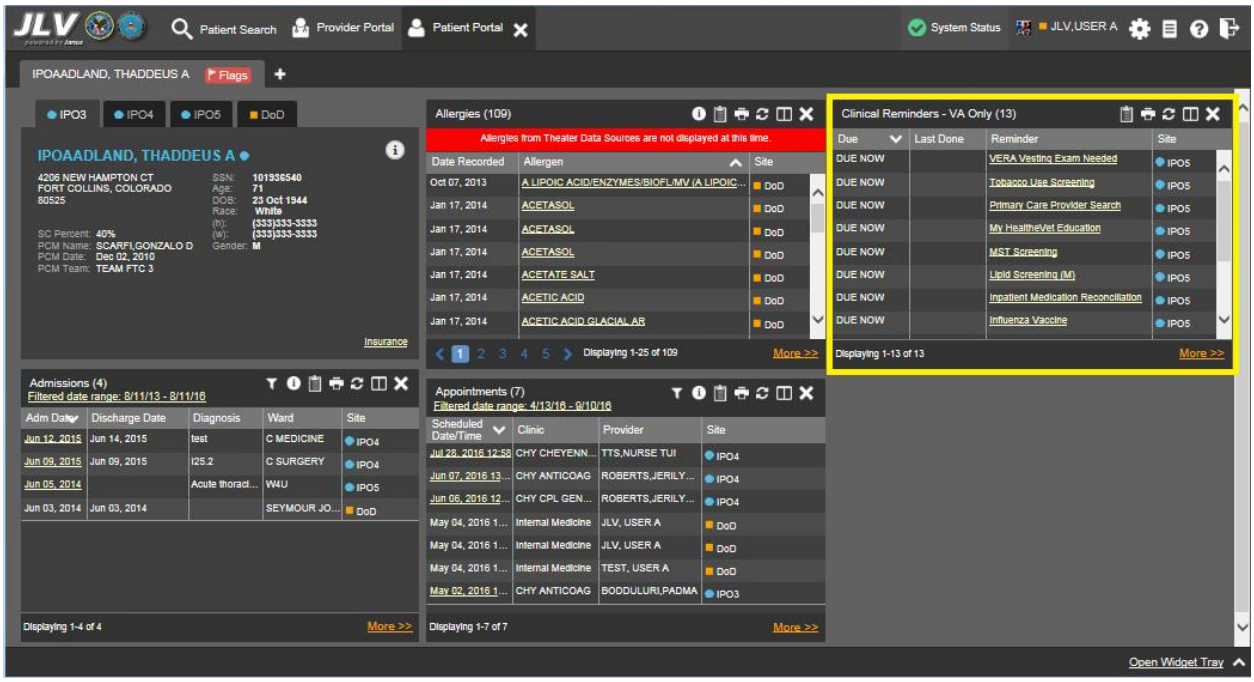
To open the widget, left-click **Clinical Reminders** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

4.9.6.1 Clinical Reminders Widget Data

The **Clinical Reminders** widget displays data from VA sources. In the minimized and expanded views of the **Clinical Reminders** widget, the clinical reminders information includes:

- Due
- Last Done
- Reminder
- Site

Figure 69: Clinical Reminders Widget – Minimized View



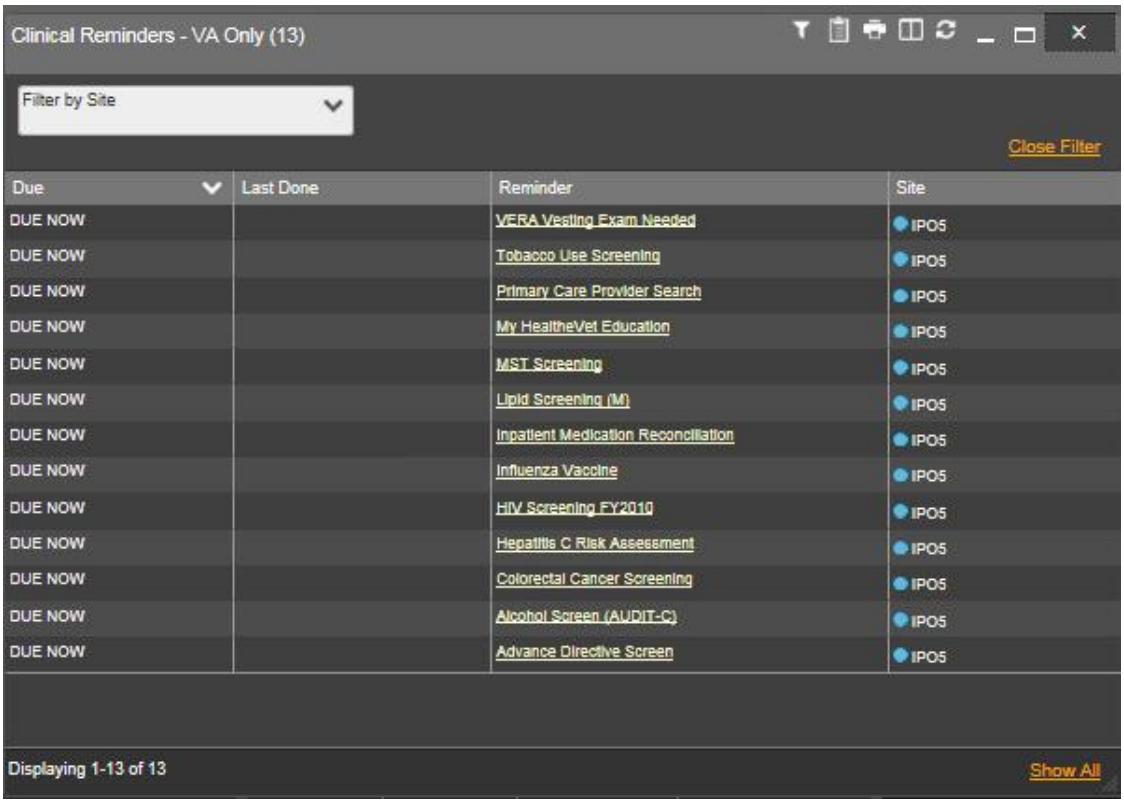
Click the column title to sort records according to data in that column. If a user sorts on a column that appears in both minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default sort or the last sort saved to the user profile.

Click a hyperlinked entry in the Reminder column in either the minimized or expanded views of the widget to open a separate window containing the details of the record. Refer to Section 4.9.6.2, Viewing Clinical Reminder Details for more information.

Click **More >>** from the minimized view of the **Clinical Reminders** widget to open an expanded view of the widget. In the expanded view, the clinical reminders information includes:

- Date
- Last Done
- Reminder
- Site

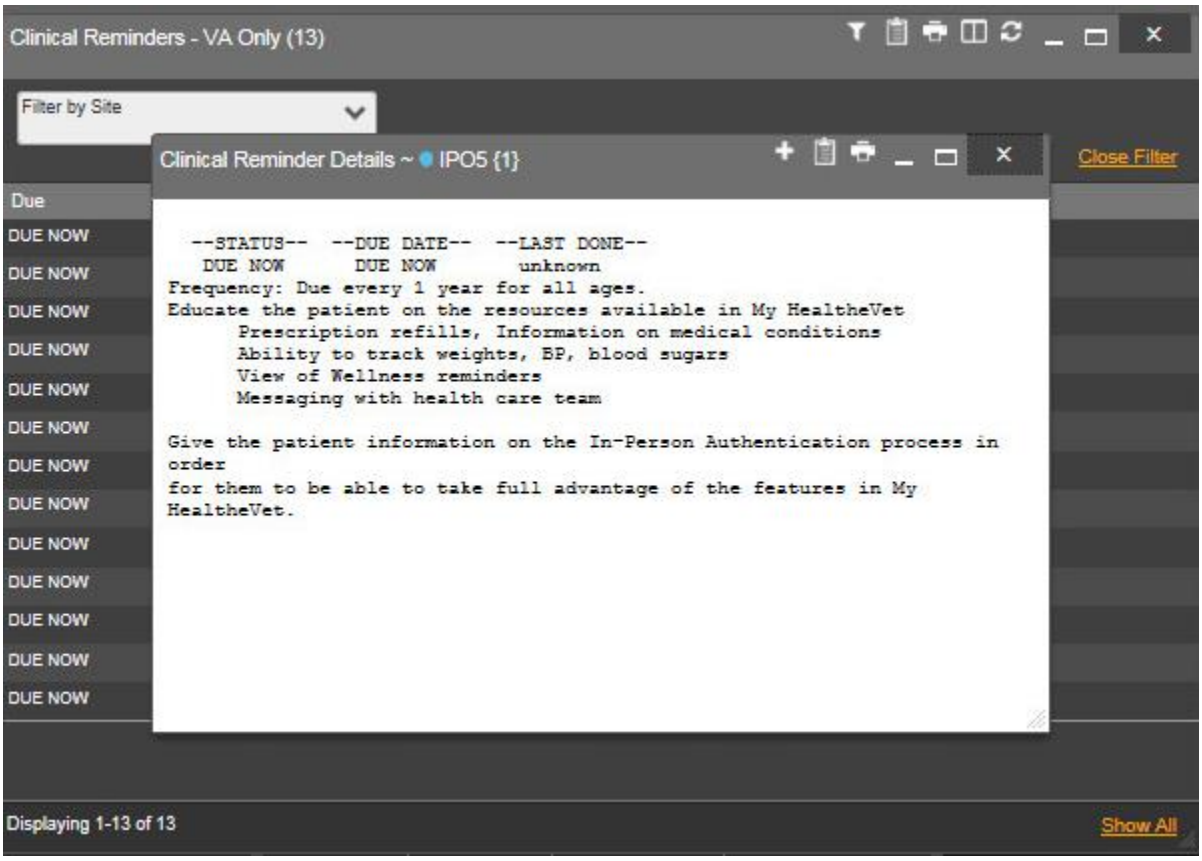
Figure 70: Clinical Reminders Widget – Expanded View



4.9.6.2 Viewing Clinical Reminder Details

Click a hyperlinked entry in the Reminder column in either the minimized or expanded views of the **Clinical Reminders** widget to open a separate window containing the details of the record.

Figure 71: Clinical Reminders Widget – Details View



4.9.7 Community Health Summaries and Documents – VA

The **Community Health Summaries and Documents – VA** widget displays the patient's VA community partner information, including any Continuity of Care Documents (CCDs), including C32 and C62 formats, and HL7 Consolidated Clinical Document Architecture (CCDA) structured documents available for the patient. The information is sorted by the title of the entry listed in the Document column.

To open the widget, left-click **Community Health Summaries and Documents – VA** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

4.9.7.1 Community Health Summaries and Documents – VA Widget Data

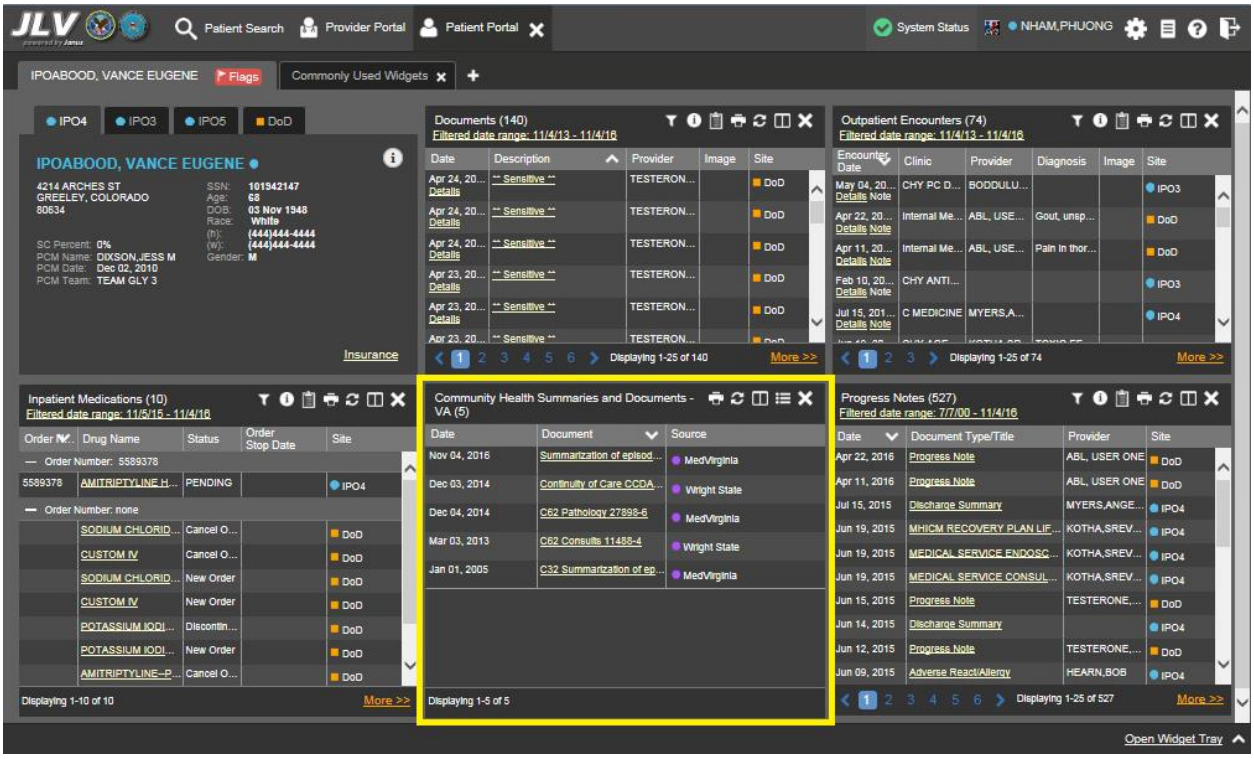
In the **Community Health Summaries and Documents – VA** widget, the community health summaries information includes:

- Date
- Document
- Source

Click a hyperlinked entry in the Document column (shown in the following figure) to open the document in a separate browser tab. Refer to Section 4.9.7.2, Viewing VA Community Health Summary Documents for more information.

The purple hexagon appearing alongside entries in the Source column represents an external source VA VLER source.

Figure 72: Community Health Summaries and Documents – VA Widget – Minimized View



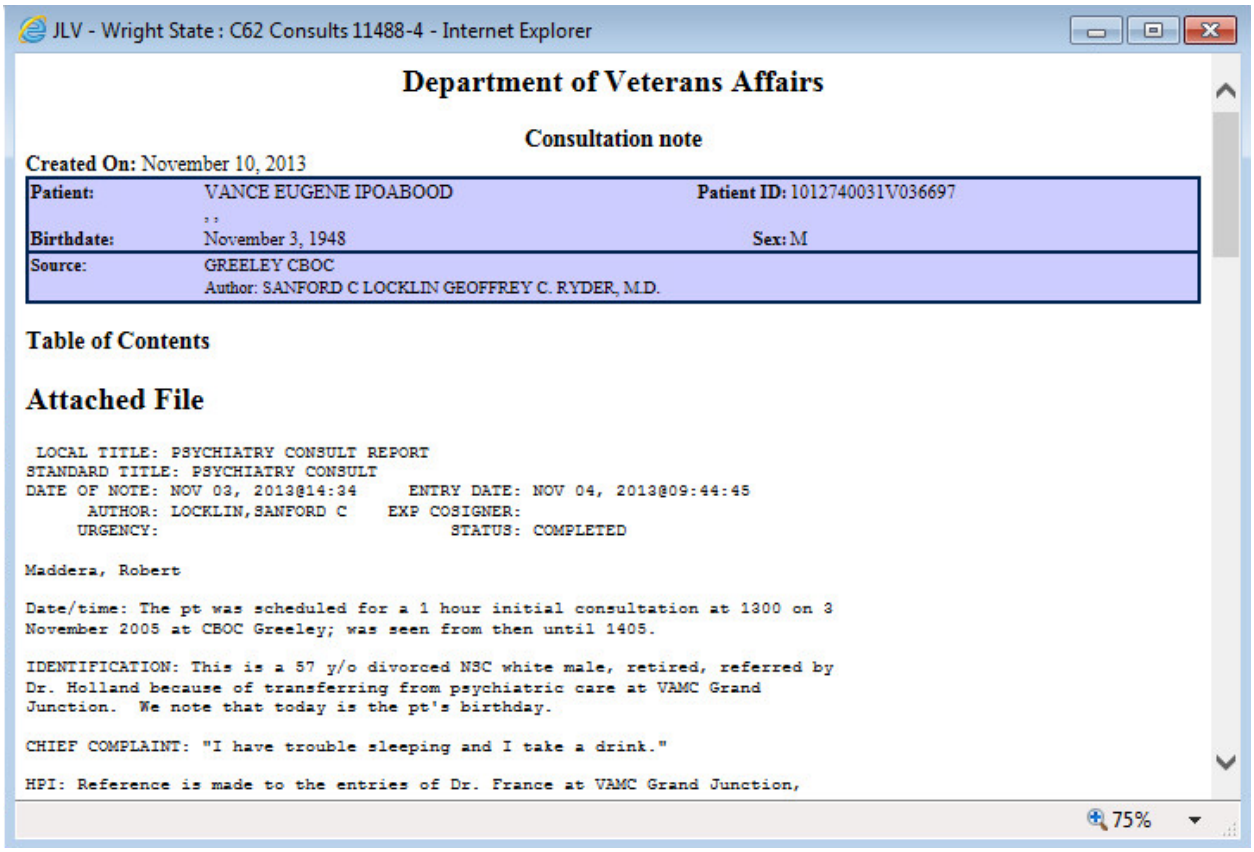
The **Site List** button available from the toolbar of the **Community Health Summaries and Documents - VA** widget (as seen in the previous figure) allows the user to view only the list of community sites where the patient has been seen. After clicking **Site List**, the widget will refresh to display the full list of community sites from the widget's Source column, as well as additional sites available from the patient's record where the patient was seen but no document was generated. Click **Close Site List** to remove the full site list from the widget display.

4.9.7.2 Viewing VA Community Health Summary Documents

Figure 72 shows health summary records available from the Document column in the **Community Health Summaries and Documents -VA** widget for VA users. Click a hyperlinked entry in that column to open the document record in a separate browser tab. A sample open document is shown in the figure below.

NOTE: From the **Community Health Summaries and Documents – VA** widget, JLV provides the capability to open and simultaneously view two or more documents in separate browser tabs.

Figure 73: Community Health Summary Document



4.9.8 Consult Encounters

The **Consult Encounters** widget displays the patient's outpatient consult encounter information. The information is displayed in reverse chronological order by the consult date.

To open the widget, left-click **Consult Encounters** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

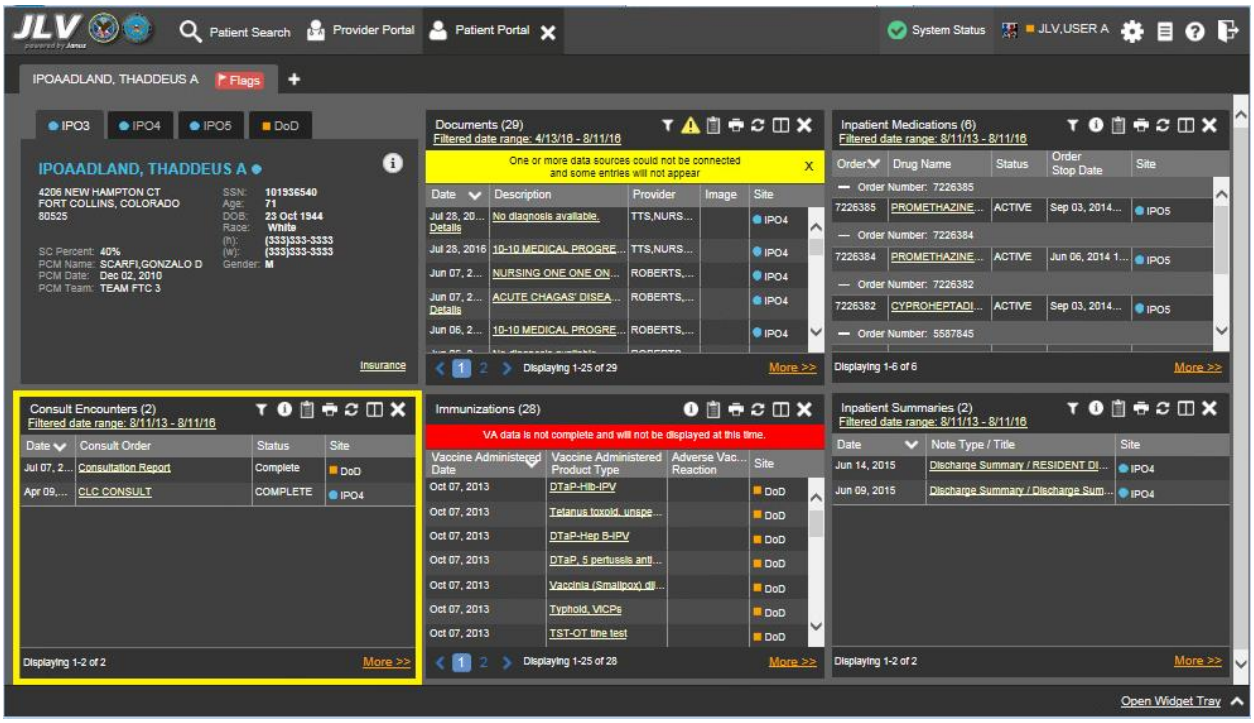
4.9.8.1 Consult Encounters Widget Data

In the minimized view of the **Consult Encounters** widget, the consult encounters information includes:

- Due
- Consult Order
- Status
- Site

Click a hyperlinked entry in the Consult Order column to open a separate window containing a report of the record. Refer to Section 4.9.8.2, Viewing Consult Encounter Details for more information.

Figure 74: Consult Encounters Widget – Minimized View

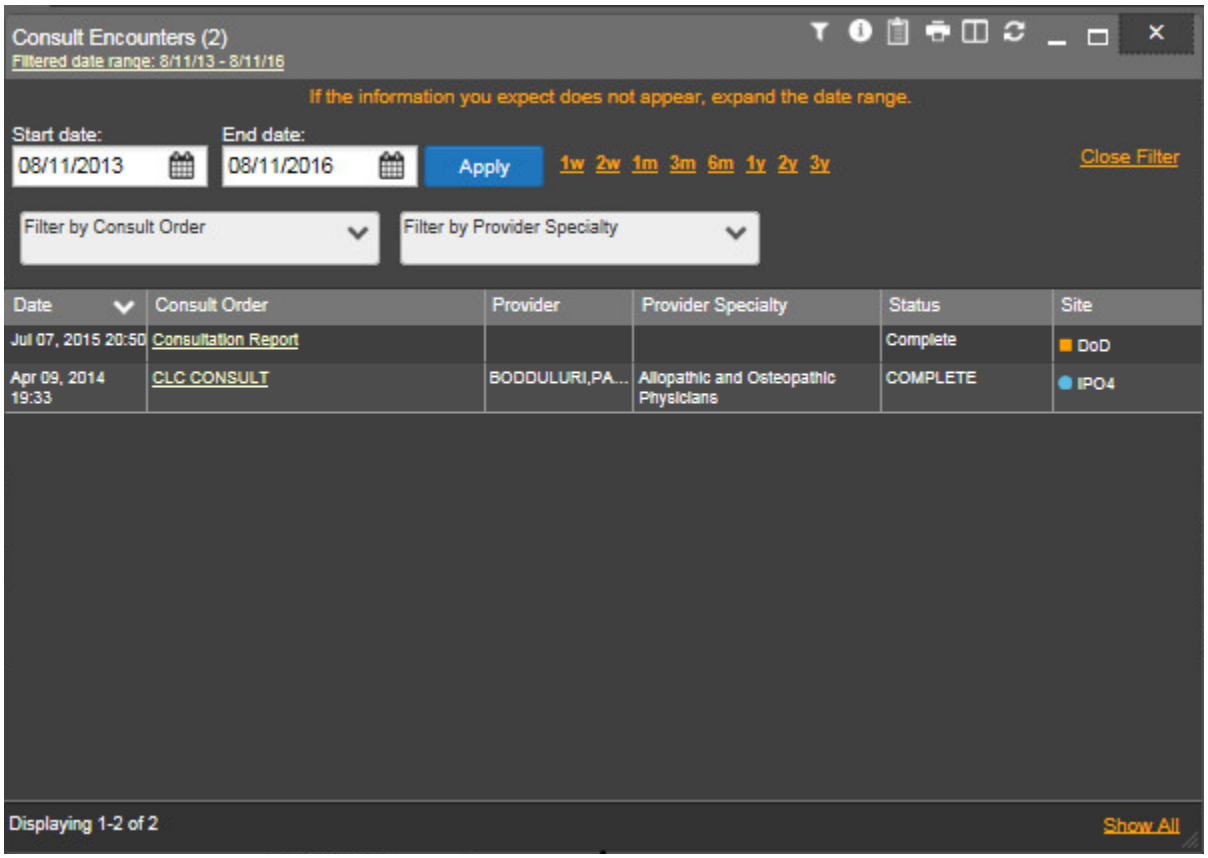


Click **More >>** from the minimized view of the **Consult Encounters** widget to open an expanded view of the widget. In the expanded view, the consult encounters information includes:

- Due
- Consult Order
- Provider
- Provider Specialty
- Status
- Site

Click a hyperlinked entry in the Consult Order column to open a separate window containing a report of the record. Refer to Section 4.9.8.2, Viewing Consult Encounter Details for more information.

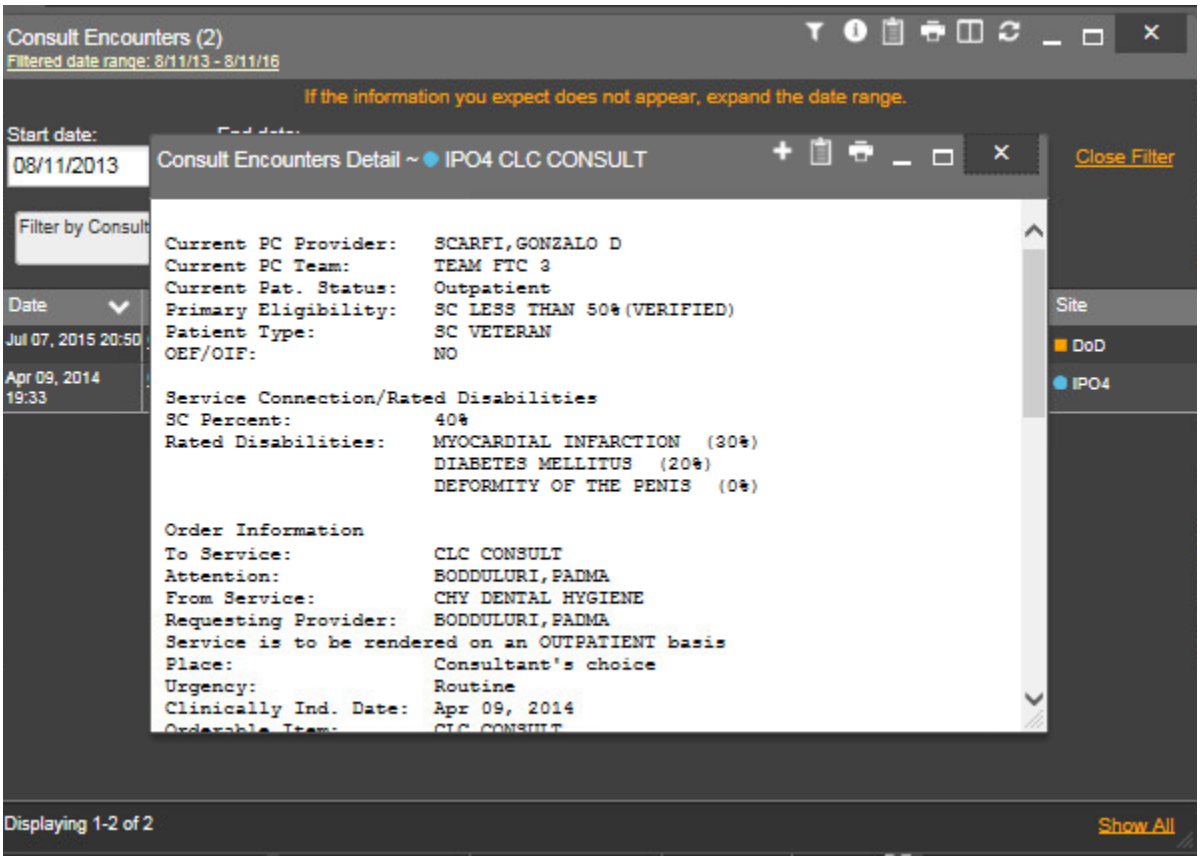
Figure 75: Consult Encounters Widget – Expanded View



4.9.8.2 Viewing Consult Encounter Details

Click a hyperlinked entry in the Consult Order column of either the minimized or expanded view of the Consult Encounters widget to open a separate window containing a report of the record.

Figure 76: Consult Encounter Details Window



4.9.8.3 Display and Filter Options

Display and filter options within the **Consult Encounters** 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Specify the date range for which records will be 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. When a date range filter is applied in an open widget, the date range is displayed in the widget header. Open or close the filter options by clicking on the date range in the header.
- Use the **Filter by Consult Order** drop-down box to re-draw the widget to show only the records for the selected consult(s).

- Use the **Filter by Provider Specialty** drop-down box to re-draw the widget to show only the records for the selected provider type(s).

4.9.8.4 Terminology Normalization in the Consult Encounters Widget

Terminology normalization is provided in the **Consult Encounters** widget through the following GUI elements:

- The data in the Provider and Provider Specialty columns in the widget are normalized to the National Uniform Claim Committee Taxonomy (NUCC) standard. Hovering over the entries in these columns will display the standardized name and standardized code for the provider.

4.9.9 Documents

The **Documents** widget includes documents from multiple clinical domains, including radiology reports (exams), progress notes, outpatient encounters, consult encounters, discharge summaries (inpatient notes), questionnaires, and Healthcare Artifact and Image Management Solution (HAIMS) records. Records are displayed in reverse chronological order by the document date.

To open the widget, left-click **Documents** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

NOTE: For DoD documents from HAIMS, records retrieved by JLV include scanned paper records, imported paper records, scanned non-radiology images, and imported non-radiology images. If a document is not viewable from the **Documents** widget, JLV will display the message *This document can only be opened in HAIMS* when the user hovers over the Description column for the record.

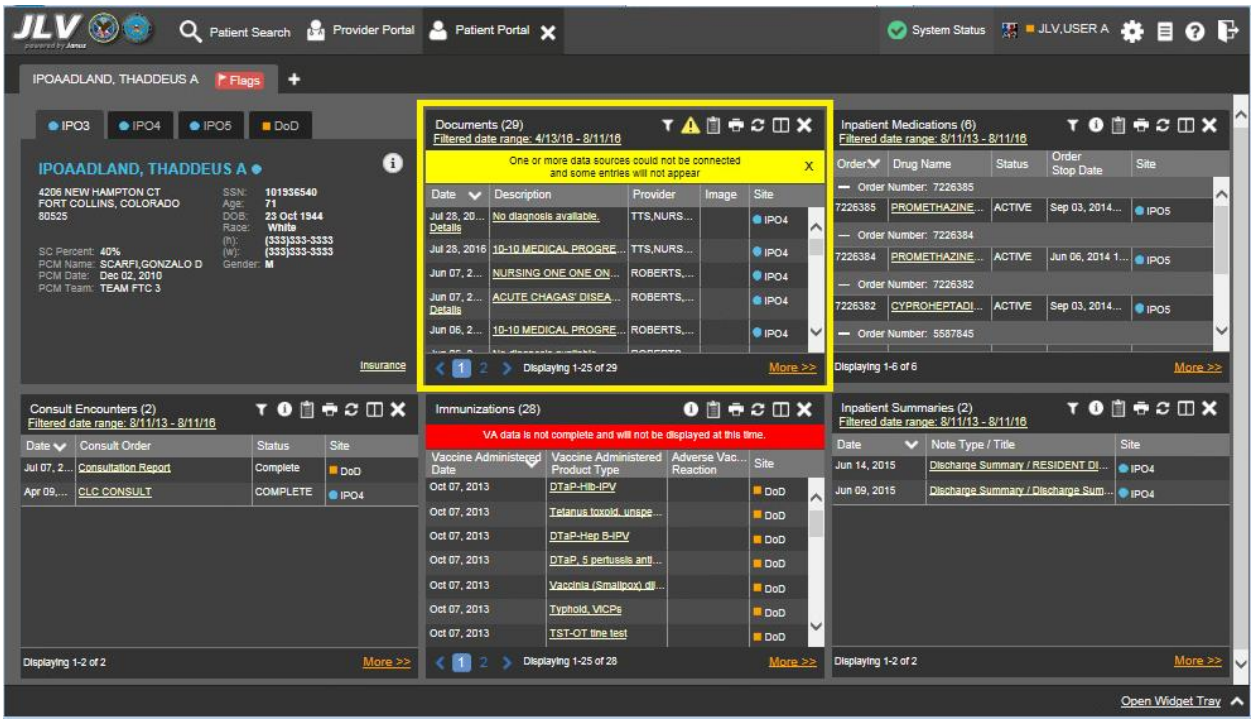
4.9.9.1 Documents Widget Data

In the minimized view of the **Documents** widget, the documents information includes:

- Date
- Description
- Provider
- Site

The Description column will display the document title, where available. Click a hyperlinked entry in the Description column in either the minimized or expanded views of the widget to open the document. Refer to Section 4.9.9.2, Viewing Documents for more information.

Figure 77: Documents Widget – Minimized View



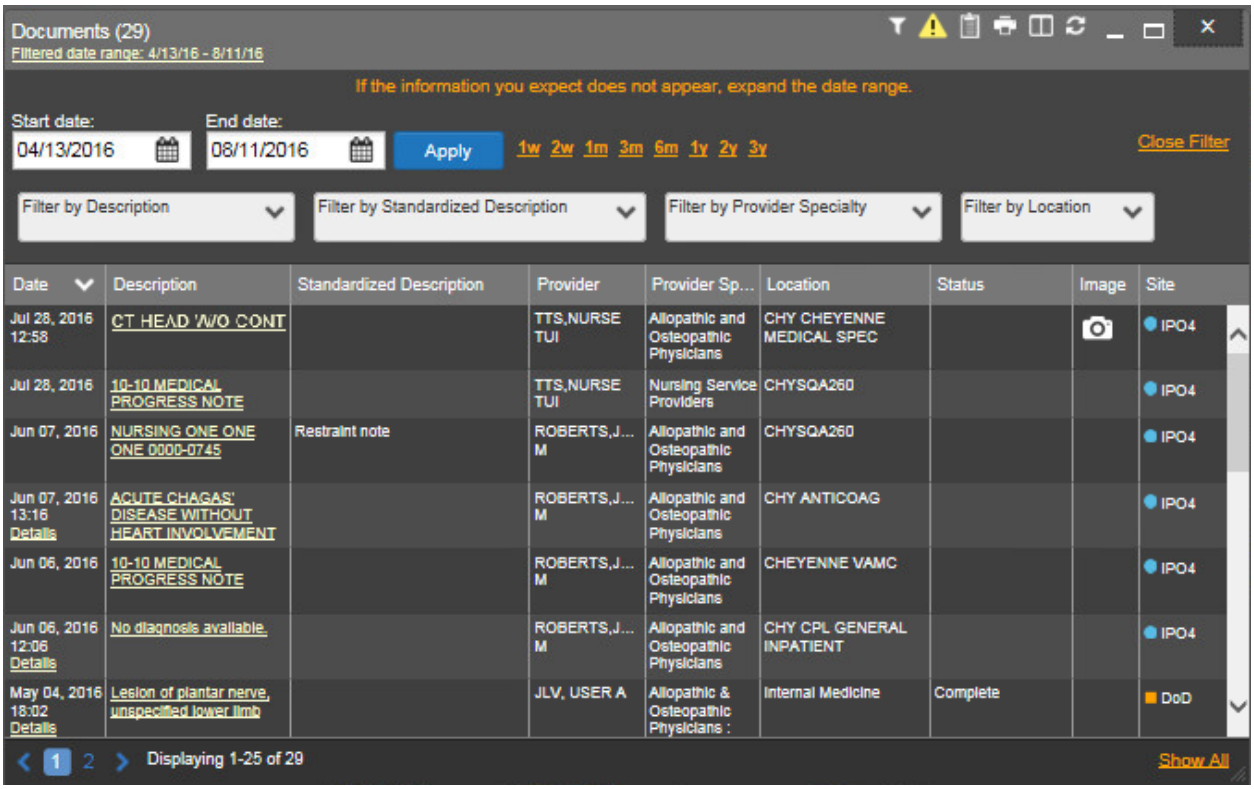
Click **More >>** from the minimized view of the **Documents** widget to open an expanded view of the widget. In the expanded view, the documents information includes:

- Date
- Description
- Standardized Description
- Provider
- Provider Specialty
- Location
- Status
- Image
- Site

The Description column will display the document title, where available. Click a hyperlinked entry in the Description column to open the document. Refer to Section 4.9.9.2, Viewing Documents for more information.

A **camera** icon in the Image column indicates that one or more images are associated with that record. Clicking the **camera icon** from the column will open the VistA Imaging Viewer in a standalone window and display the associated image(s).

Figure 78: Documents Widget – Expanded View



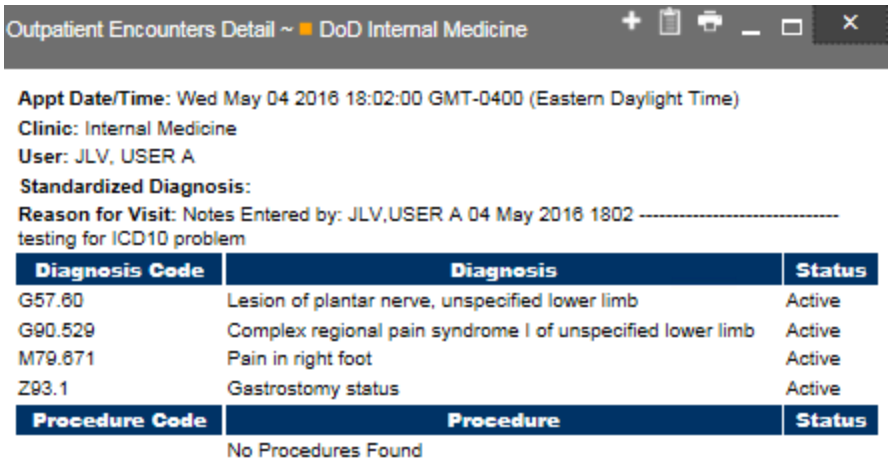
4.9.9.2 Viewing Documents

Click a hyperlinked entry in the Description column in either the minimized or expanded views of the **Documents** widget to access additional information from the record. Depending on the record type, the information may open in a details window or a separate browser window. The example in the following figure represents a sample radiology report (DoD record) in a details window accessed through the **Documents** widget.

Outpatient encounter records from VA sites displayed in the **Documents** widget may also have a **Details** link enabled in the Date column. Click **Details** as available to open a details window for records of this type.

NOTE: JLV does not validate that all file types from HAIMS displayed in the **Documents** widget are supported by the user's local workstation. If an error viewing a HAIMS document occurs or the displayed document is unintelligible, it is recommended that the user contacts the local Information Technology (IT) support team to install the proper client application to display the specific file type.

Figure 79: Documents Widget – Sample Open Document Record



4.9.9.3 Viewing Sensitive Data in the Documents Widget

JLV masks the display of sensitive records in the **Documents** widget (a record masked with **** Sensitive ****** in the widget). JLV users may access the record but will be audited each time a sensitive DoD record is viewed.

After clicking the hyperlink in the Description column for a record masked as sensitive, JLV will notify the user that he/she will be audited. This message is triggered each time a user clicks a sensitive record. After the user selects his/her purpose to view the record and agrees to be audited, sensitive data will appear in the Details view but the record will remain masked in the minimized and expanded views of the widget.

4.9.9.4 Display and Filter Options

Display and filter options within the **Documents** 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.
- Specify the date range for which records will be 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. When a date range filter is applied in an open widget, the date range is displayed in the widget header. Open or close the filter options by clicking on the date range in the header.
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Use the **Filter by Description** drop-down box to re-draw the widget to show only the records for the selected description(s).

- Use the **Filter by Standardized Description** drop-down box to re-draw the widget to show only the records for the selected description(s).
- Use the **Filter by Provider Specialty** drop-down box to re-draw the widget to show only the records for the selected provider type(s).
- Use the **Filter by Location** drop-down box to re-draw the widget to show only the records for the selected location(s).

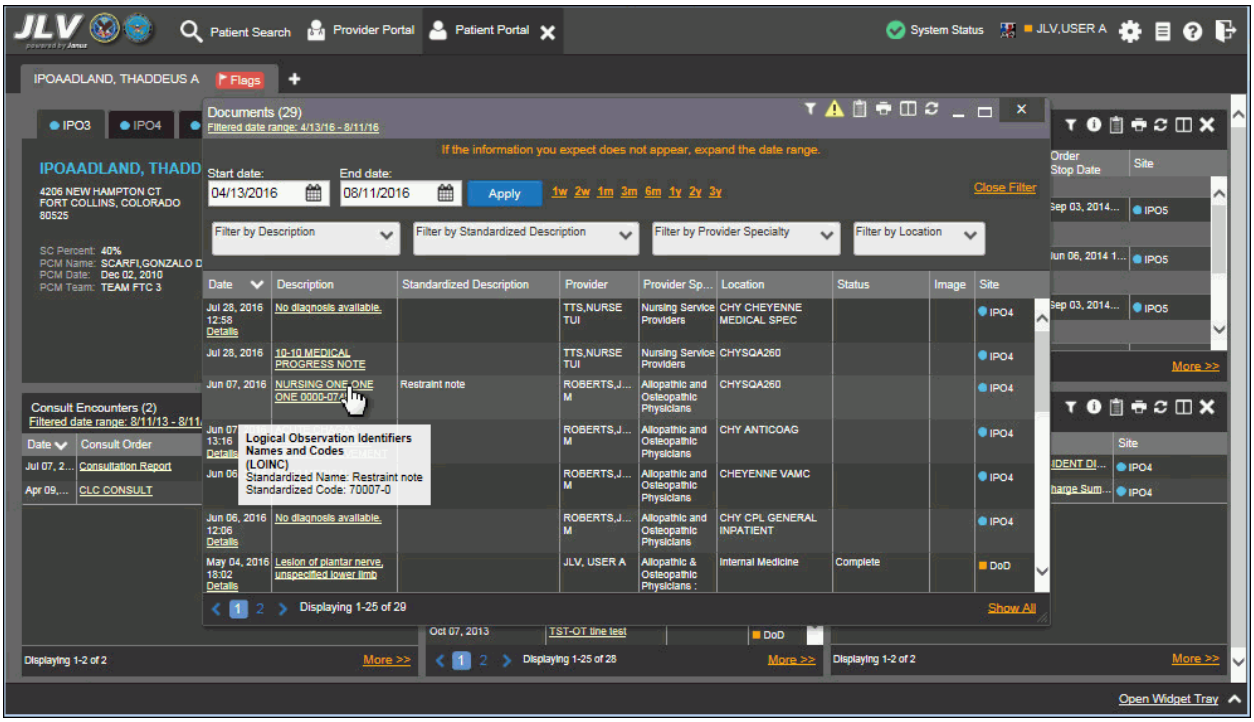
4.9.9.5 Terminology Normalization in the Documents Widget

Terminology normalization is provided in the **Documents** widget through the following GUI elements:

- The Description column displays the name of a note or document within the patient's record. Hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain Logical Observation Identifiers Names and Codes (LOINC), the standardized LOINC name, and the standardized code for that document.
- The Standardized Description column displays the standardized name for the corresponding entry in the Description column, mapped to the LOINC standard. In addition to the standardized name, hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (LOINC), and the standardized code for that document.
- The data in the Provider and Provider Specialty columns in the minimized and expanded views of the widget are normalized to the National Uniform Claim Committee Taxonomy (NUCC) standard. Hovering over the entries in these columns will display the standardized name and standardized code for the provider.

The following example highlights a document mapped to the LOINC standard. The standardized name and standardized code are displayed in the hover text over the record in the Description column.

Figure 80: Documents Widget – Terminology Normalization



4.9.10 Immunizations

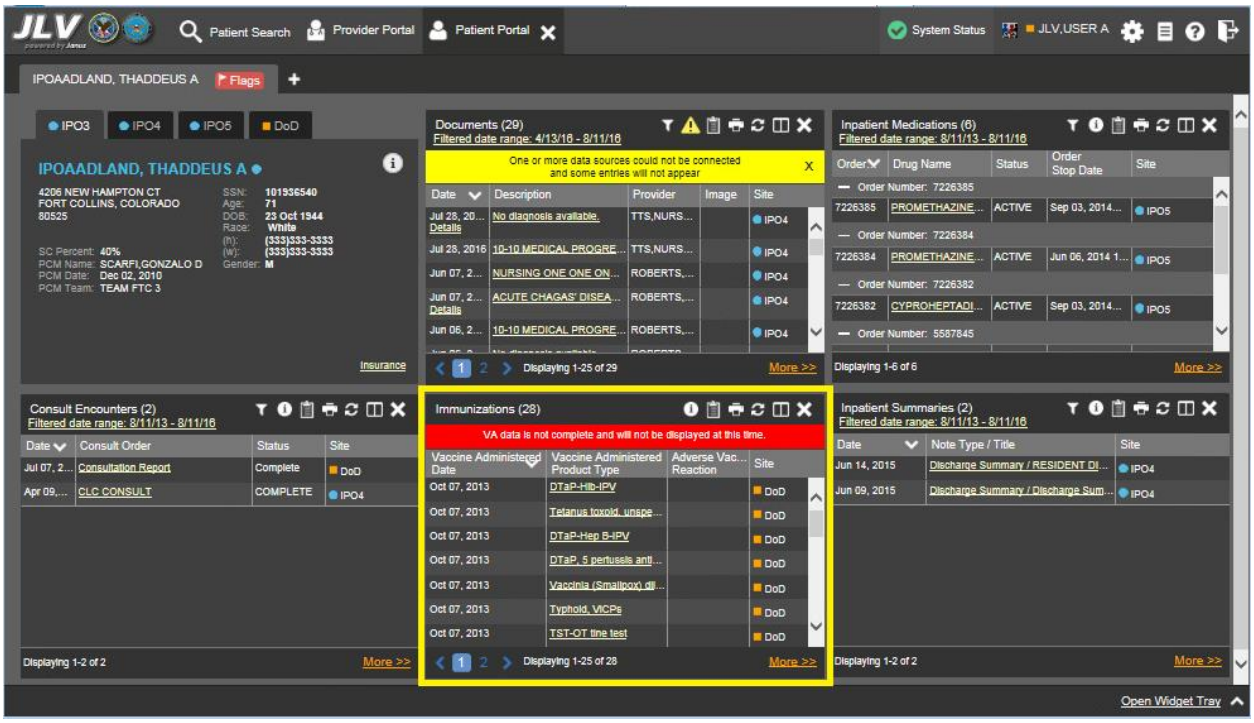
The **Immunizations** widget displays the patient's immunization history. The information is displayed in reverse chronological order by the immunization administration date.

To open the widget, left-click **Immunizations** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

In the minimized view of the **Immunizations** widget, the immunizations information includes:

- Vaccine Administered Date
- Vaccine Administered Product Type
- Adverse Vaccine Reaction
- Site

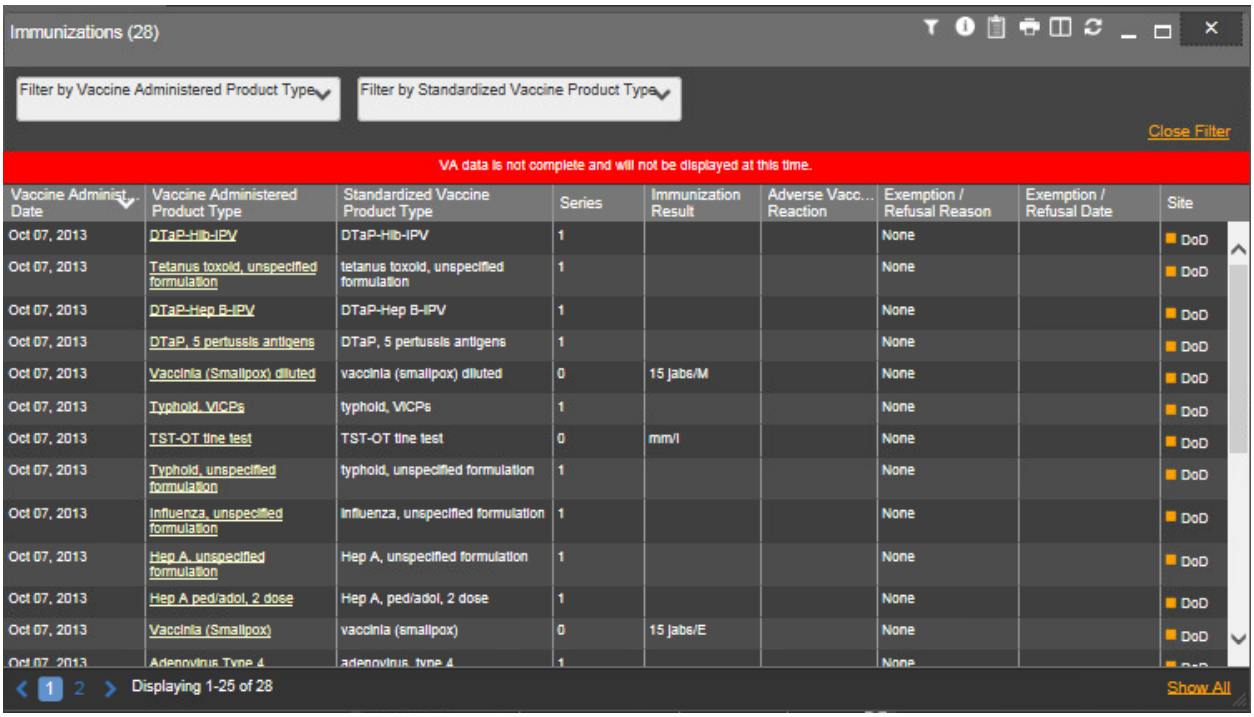
Figure 81: Immunizations Widget – Minimized View



Click **More >>** from the minimized view of the **Immunizations** widget to open an expanded view of the widget. In the expanded view, the immunizations information includes:

- Vaccine Administered Date
- Vaccine Administered Product Type
- Standardized Vaccine Product Type
- Series
- Immunization Result
- Adverse Vaccine Reaction
- Exemption/Refusal Reason
- Exemption/Refusal Date
- Site

Figure 82: Immunizations Widget – Expanded View



4.9.10.1 Display and Filter Options

Display and filter options within the **Immunizations** 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Use the **Filter by Vaccine Administered Product Type** drop-down box to re-draw the widget to show only the records for the selected vaccine(s).
- Use the **Filter by Standardized Vaccine Product Type** drop-down box to re-draw the widget to show only the records for the selected vaccine(s).

4.9.10.2 Terminology Normalization in the Immunizations Widget

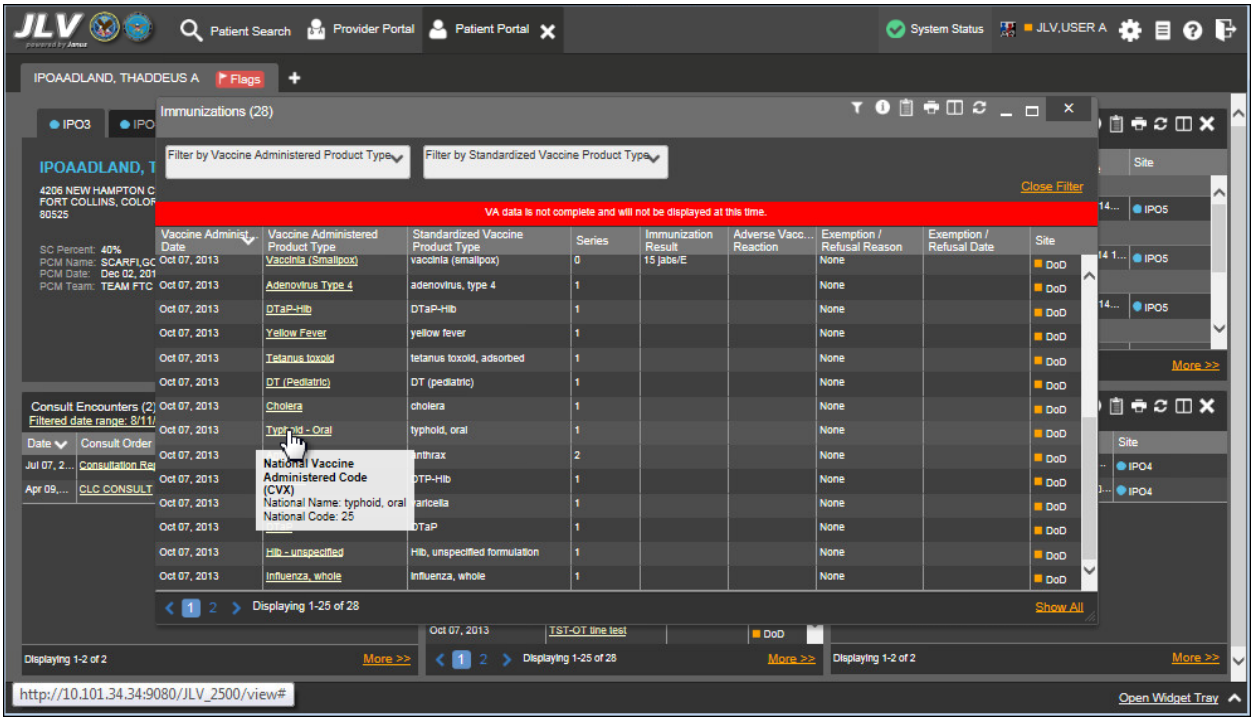
Terminology normalization is provided in the **Immunizations** widget through the following GUI elements:

- The Vaccine Administered Product Type column displays immunizations data within the patient's record. Hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain Code for Vaccines Administered (CVX), the standardized vaccine name, and the standardized CVX code for that immunization.

- The Standardized Vaccine Product Type column displays the standardized name for the corresponding entry in the Vaccine Administered Product Type column, mapped to the CVX standard. In addition to the standardized name, hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (CVX), and the CVX code for that immunization.

The following example highlights a vaccine mapped to the CVX standard. The national name and national code are displayed for the record in the hover text over the Vaccine Administered Product Type column.

Figure 83: Immunizations Widget – Terminology Normalization



4.9.11 Inpatient Medications

The **Inpatient Medications** widget displays the patient's inpatient medications information. The medications are grouped by the order number where available.

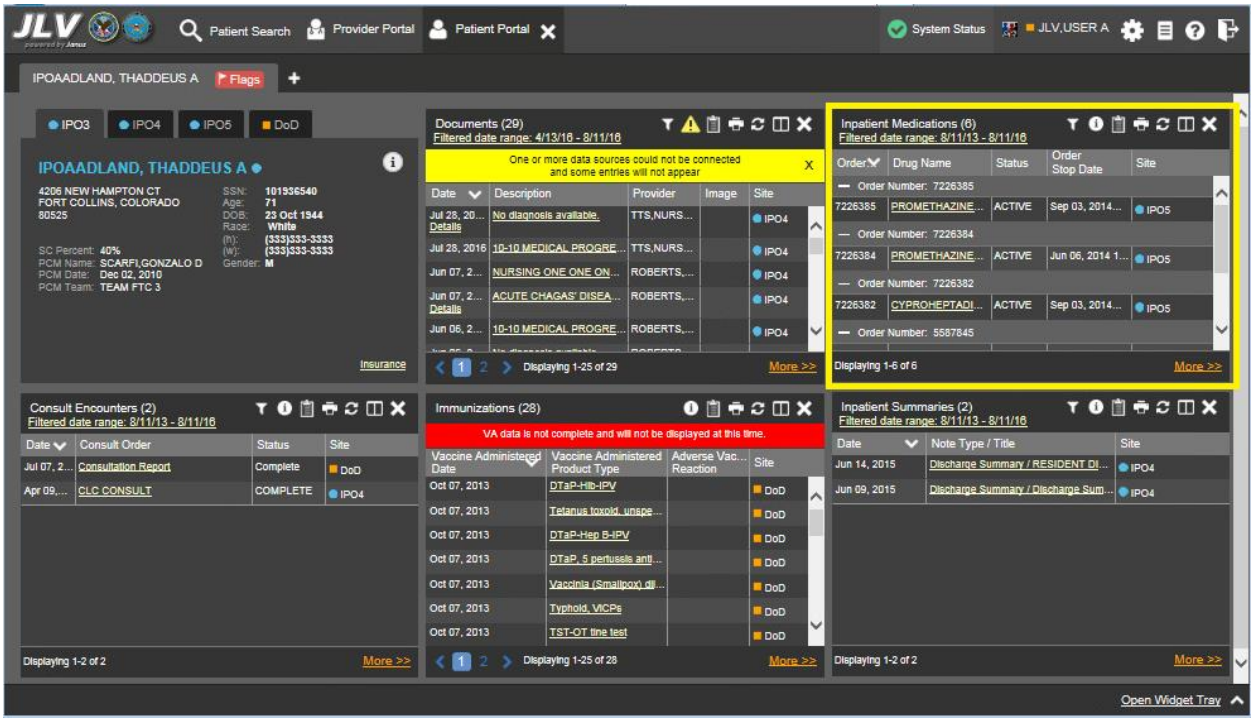
To open the widget, left-click **Inpatient Medications** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

4.9.11.1 Inpatient Medications Widget Data

In the minimized view of the **Inpatient Medications** widget, the inpatient medications information includes:

- Order Number[4]
- Drug Name
- Status
- Stop Date
- Site

Figure 84: Inpatient Medications Widget – Minimized View



Click **More >>** from the minimized view of the **Inpatient Medications** widget to open an expanded view of the widget. In the expanded view, the inpatient medications information includes:

- Order Number[5]
- Order Start Date
- Order Stop Date
- Drug Name
- Standardized Drug Name

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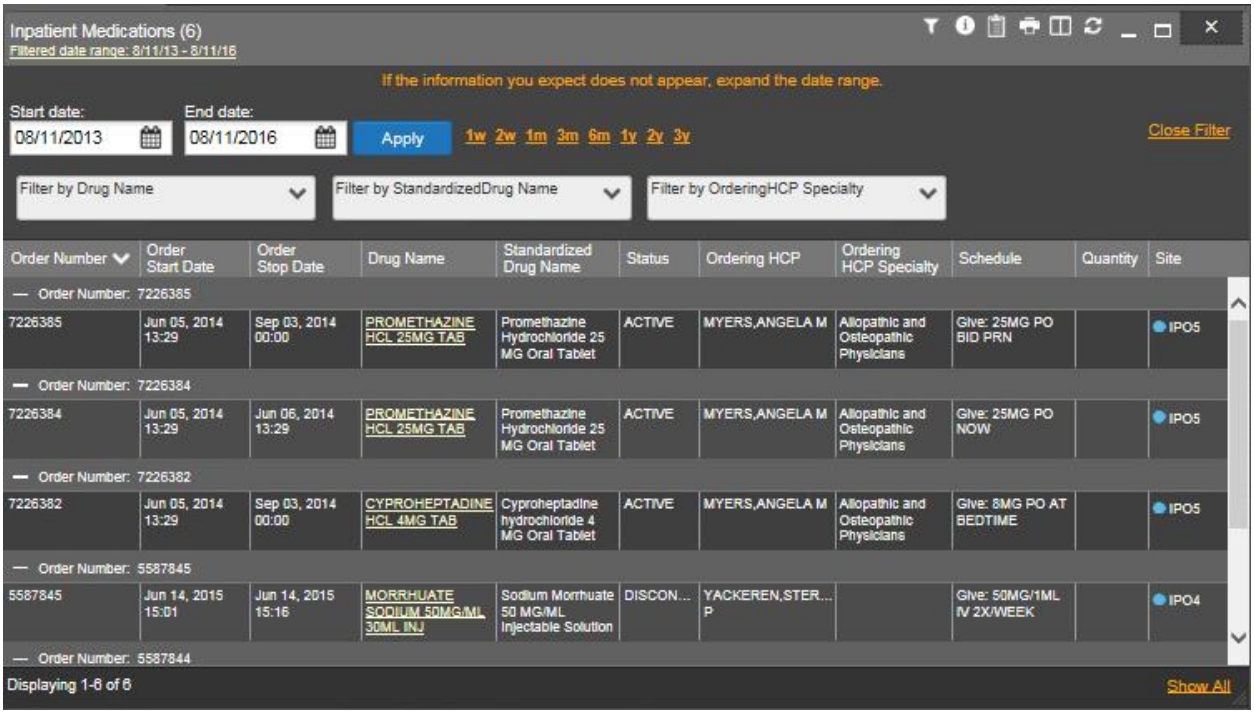
[4] When there are multiple drugs with the same order number, JLV maintains the grouping by order number when a column sort is applied in the widget.

[5] When there are multiple drugs with the same order number, JLV maintains the grouping by order number when a column sort is applied in the widget.

- Status
- Ordering HCP
- Ordering HCP Specialty
- Schedule
- Quantity
- Site

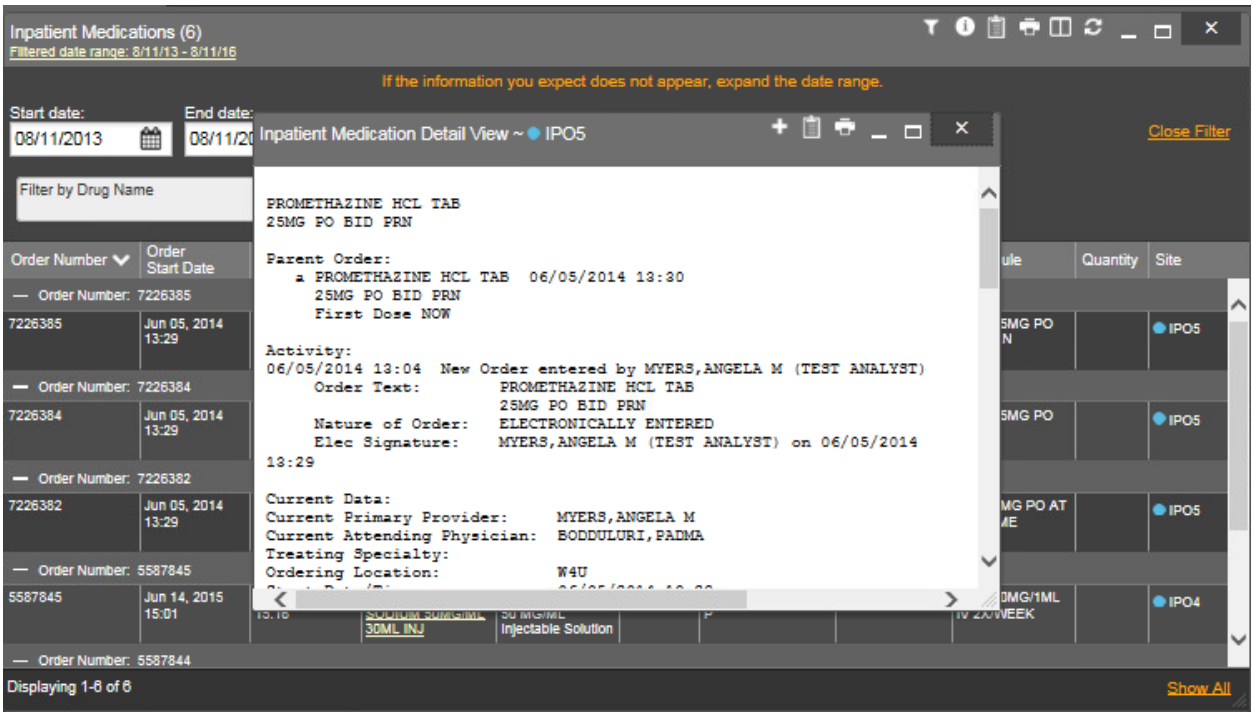
Figure 85: Inpatient Medications Widget – Expanded View



4.9.11.2 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 containing the detail of the medication.

Figure 86: Inpatient Medications Widget – Details of VA Medication



4.9.11.3 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile. When there are multiple drugs with the same order number, JLV maintains the grouping by order number when a column sort is applied in the widget.
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Specify the date range for which records will be 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. When a date range filter is applied in an open widget, the date range is displayed in the widget header. Open or close the filter options by clicking on the date range in the header.
- Use the **Filter by Drug Name** drop-down box to re-draw the widget to show only the records for the selected medication(s).
- Use the **Filter by Standardized Drug Name** drop-down box to re-draw the widget to show only the records for the selected medication(s).

- Use the **Filter by Ordering HCP Specialty** drop-down box to re-draw the widget to show only the records for the ordering HCP.

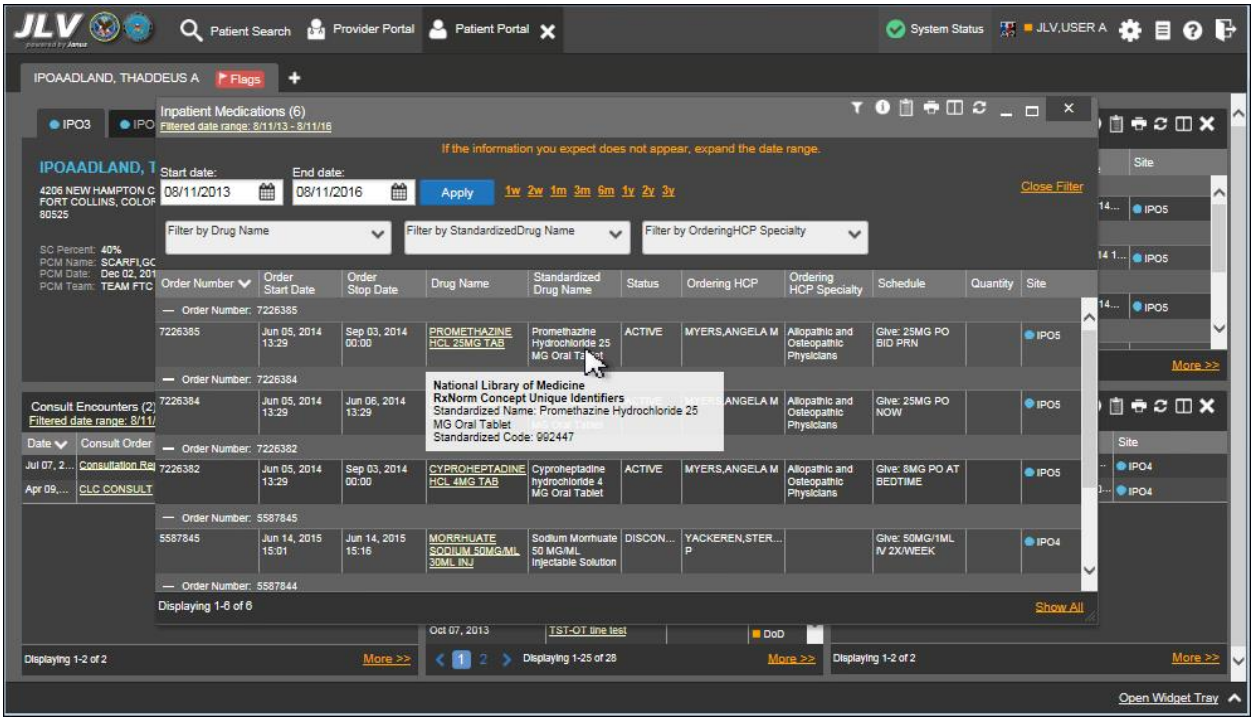
4.9.11.4 Terminology Normalization in the Inpatient Medications Widget

Terminology normalization is provided in the **Inpatient Medications** widget through the following GUI elements:

- The Drug Name column displays a medication within the patient's record. Hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (RxNorm), the standardized RxNorm name, and the standardized RxNorm code for that medication.
- The Standardized Drug Name column displays the standardized name for the corresponding entry in the Drug Name column, mapped to the RxNorm standard. In addition to the standardized name, hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (RxNorm), and the standardized code for that medication.
- The data in the Ordering HCP and Ordering HCP Specialty columns in the minimized and expanded views of the widget are normalized to the National Uniform Claim Committee Taxonomy (NUCC) standard. Hovering over the entries in these columns will display the standardized name and standardized code for the ordering HCP (provider).

The following example highlights a medication record mapped to the RxNorm standard. The standardized name and standardized code are displayed in the hover text over the record in the Standardized Drug Name column.

Figure 87: Inpatient Medications Widget – Terminology Normalization



4.9.12 Inpatient Summaries

The Inpatient Summaries widget displays the patient's discharge summaries, as well as history and physical summaries. The information is displayed in reverse chronological order by the note date.

To open the widget, left-click Inpatient Summaries from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

4.9.12.1 Inpatient Summaries Widget Data

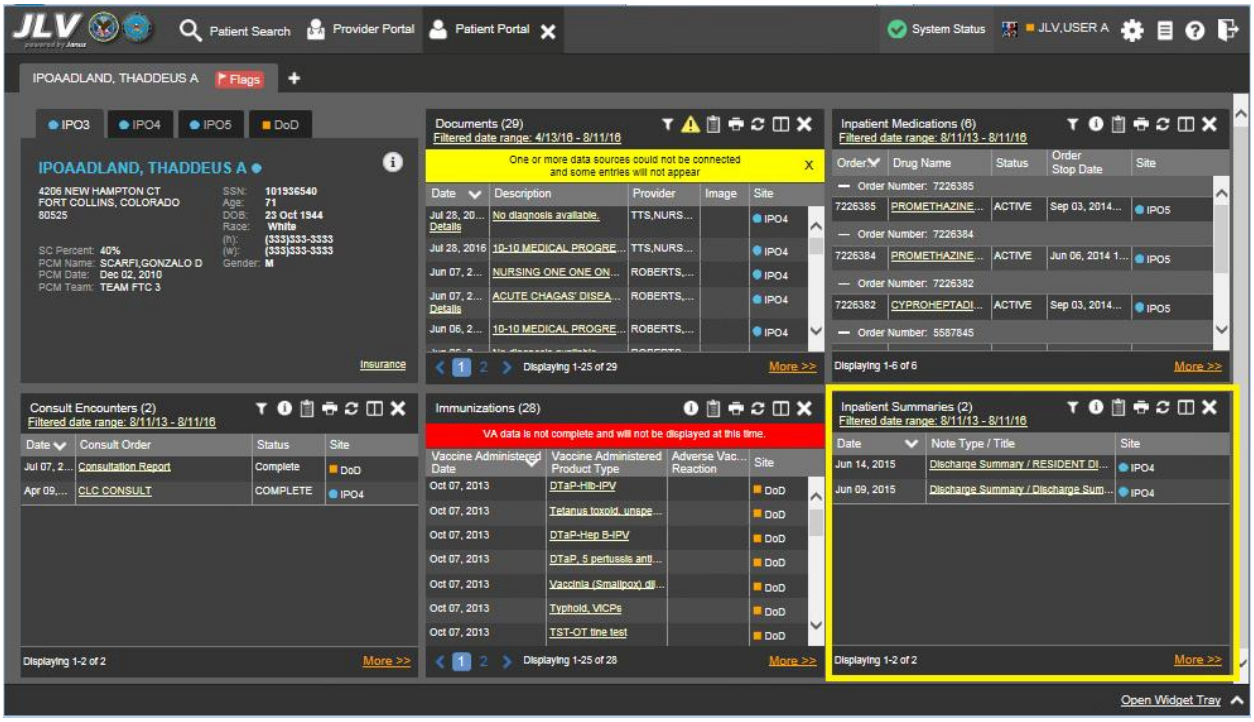
In the minimized view of the **Inpatient Summaries** widget, the column display includes:

- Date
- Note Type/Title
- Site

Click from the widget toolbar to display the filter options in the minimized view of the widget. Using expanded search dates within the widget is recommended to display notes started prior to admission and notes signed after discharge. Refer to Section 4.9.12.3, Display and Filter Options for more information.

Click the hyperlink in the Note Type/Title column of either view of the Inpatient Summaries widget to open a separate window containing the detail of the note. Refer to Section 4.9.12.2, Viewing Inpatient Summaries Details for more information.

Figure 88: Inpatient Summaries Widget – Minimized View



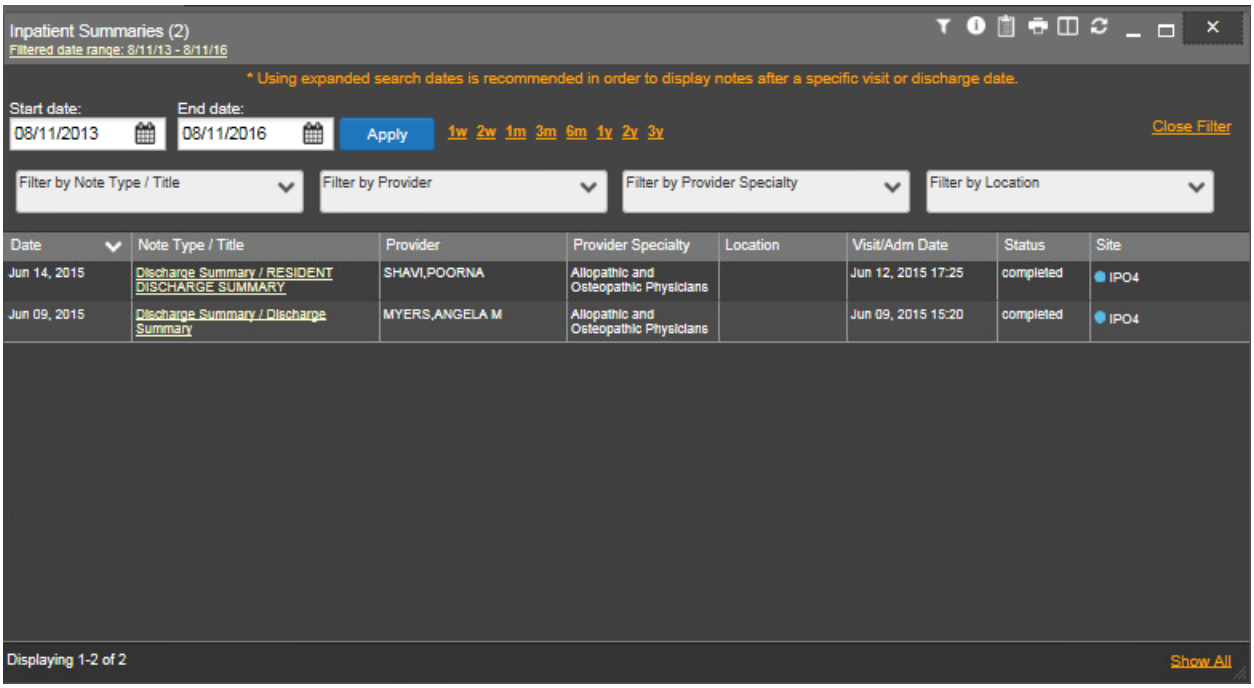
Click **More >>** from the minimized view of the **Inpatient Summaries** widget to open an expanded view of the widget. In the expanded view, the column display includes:

- Date
- Note Type/Title
- Provider
- Provider Specialty
- Location
- Visit/Adm Date
- Status
- Site

Data in the Provider Specialty column within the Inpatient Summaries widget is populated with VA data only.

NOTE: Using expanded search dates within the widget is recommended to display notes started prior to admission and notes signed after discharge.

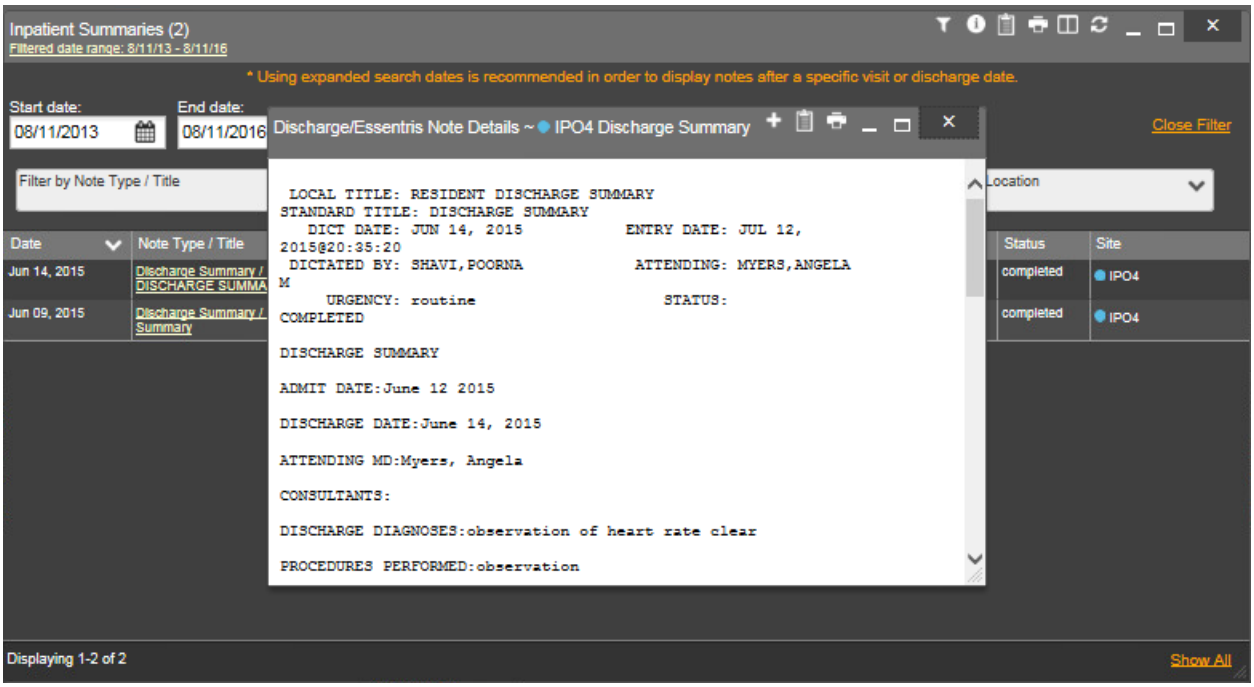
Figure 89: Inpatient Summaries Widget – Expanded View



4.9.12.2 Viewing Inpatient Summaries Details

Click the hyperlink in the Note Type/Title column of either view of the **Inpatient Summaries** widget to open a separate window containing the detail of the note. The following figure shows a sample discharge summary.

Figure 90: Inpatient Summaries Widget – Details View



4.9.12.3 Display and Filter Options

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

- Click ▼ from the widget toolbar to display the filter options in the minimized view of the widget.
- Click the column title to sort records according to data in that column. If a user sorts on a column that appears in both minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.
- Click **Column Settings** ◫ in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Specify the date range for which records will be displayed in the widget using the **Quick Date Range Selector** or the **Start Date** and **End Date** calendars. Using expanded search dates is recommended to display notes started prior to admission and notes signed after discharge. When a date range filter is applied in an open widget, the date range is displayed in the widget header. Open or close the filter options by clicking on the date range in the header.
- **Display Tip:** When looking for Essentris information associated with a specific admission, it is recommended that you expand search date ranges to include additional days before and after the admission. This will include pre-admission notes as well as notes signed after the patient was discharged in the filtered widget display.
- Use the **Filter by Note Type/Title** drop-down box to re-draw the widget to show only the records for the selected note type(s).

- Use the **Filter by Provider** drop-down box to re-draw the widget to show only the records for the selected provider(s).
- Use the **Filter by Provider Specialty** drop-down box to re-draw the widget to show only the records for the selected provider type(s).
- Use the **Filter by Location** drop-down box to re-draw the widget to show only the records for the selected location(s).

4.9.12.4 Terminology Normalization in the Inpatient Summaries Widget

Terminology normalization is provided in the **Inpatient Summaries** widget through the following GUI elements:

- The data in the Provider and Provider Specialty columns in the widget are normalized to the National Uniform Claim Committee Taxonomy (NUCC) standard. Hovering over the entries in these columns will display the standardized name and standardized code for the provider.

4.9.13 Lab Panel Results

The **Lab Panel Results** widget displays the patient's lab panels and associated results and interpretations. The information is displayed in reverse chronological order by collection date.

To open the widget, left-click **Lab Panel Results** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

4.9.13.1 Lab Panel Results Widget Data

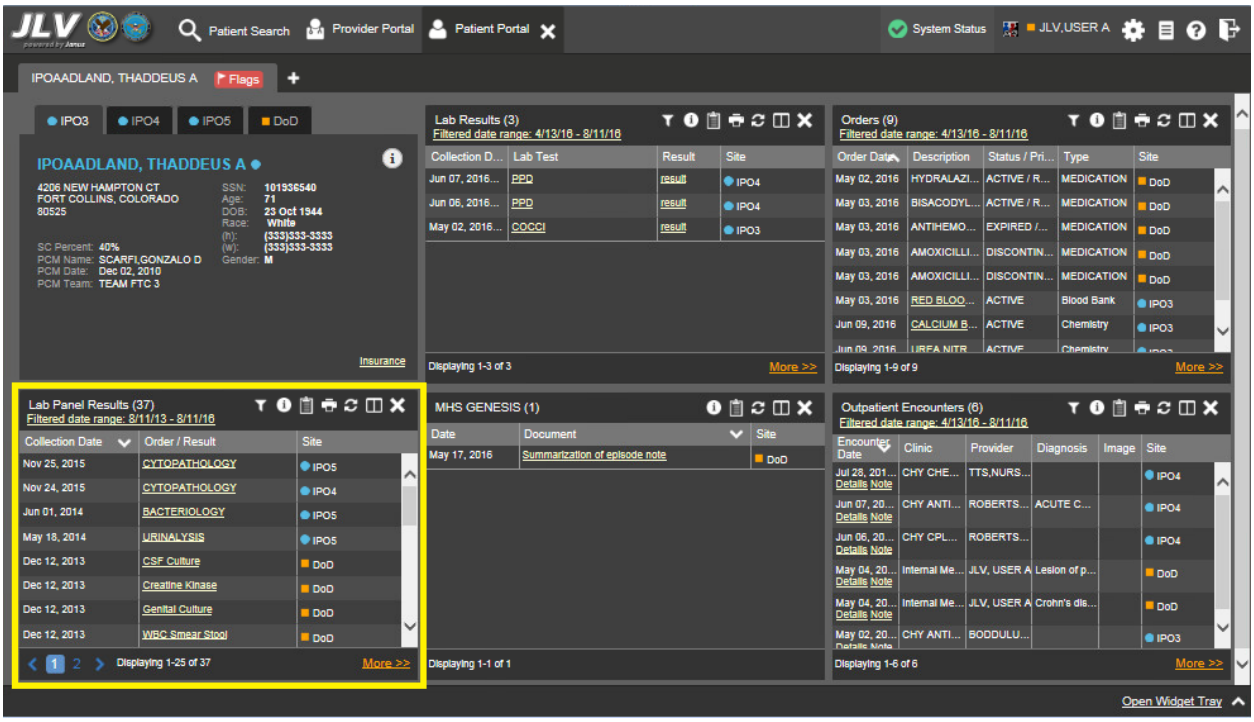
In the minimized view of the **Lab Panel Results** widget, the lab information includes:

- Collection Date
- Order/Result
- Site

NOTE: The time zone for time stamps displayed in the Collection Date column will vary depending on the source of the data. The Collection Date column time stamps for DoD Armed Forces Health Longitudinal Technology Application (AHLTA) data represents Zulu time while the Collection Date column time stamps for DoD Composite Health Care System (CHCS) and VA records represent local time.

Click a hyperlinked entry in the Order/Result column to open a separate window containing details for that record. Refer to Section 4.9.13.3, Viewing Lab Panel Results Details for more information.

Figure 91: Lab Panel Results Widget – Minimized View



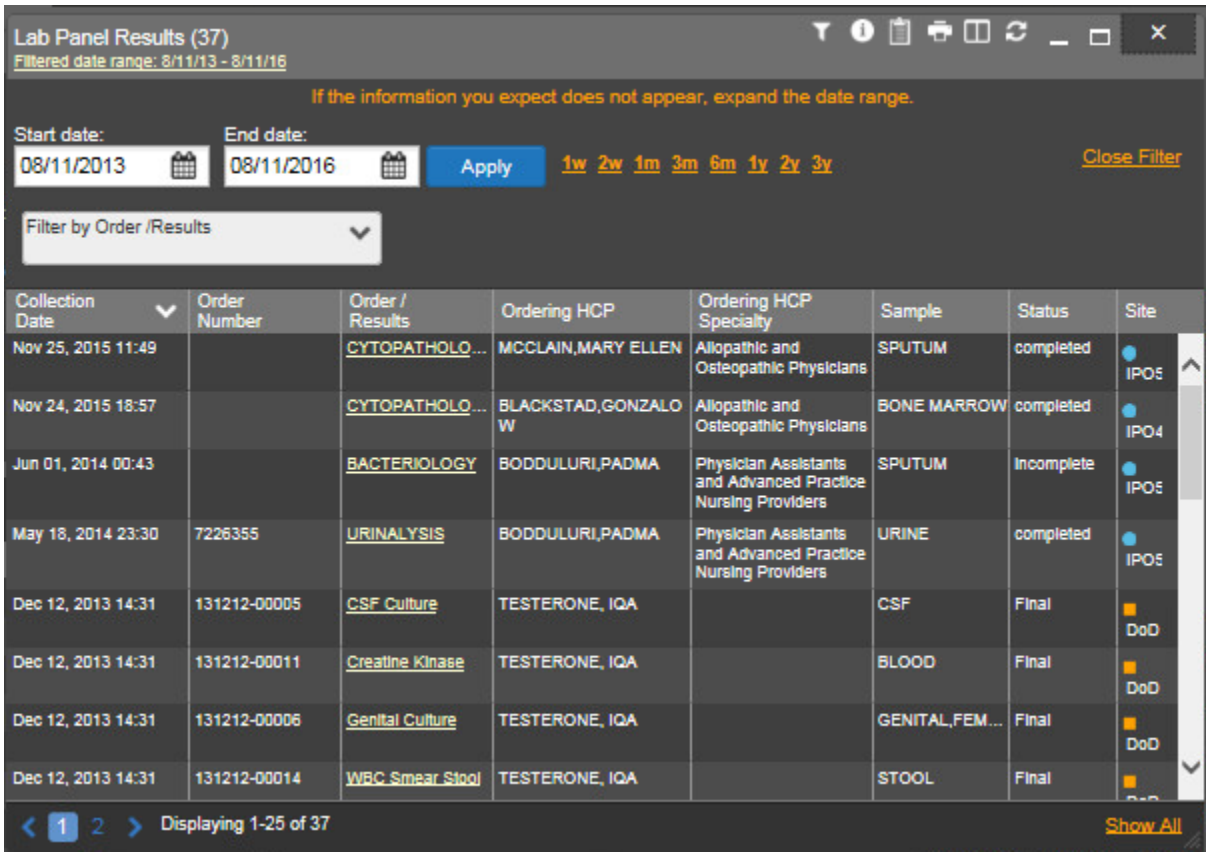
Click **More** >> from the minimized view of the **Lab Panel Results** widget to open an expanded view of the widget. In the expanded view, the lab results information includes:

- Collection Date
- Order Number
- Order/Results
- Ordering HCP
- Ordering HCP Specialty
- Sample
- Status
- Site

NOTE: The time zone for time stamps displayed in the Collection Date column will vary depending on the source of the data. The Collection Date column time stamps for DoD Armed Forces Health Longitudinal Technology (AHLTA) data represents Zulu time while the Collection Date column time stamps for DoD CHCS and VA records represent local time.

Click a hyperlinked entry in the Order/Results column to open a separate window containing details for that record. Refer to Section 4.9.13.3, Viewing Lab Panel Results Details for more information.

Figure 92: Lab Panel Results Widget – Expanded View

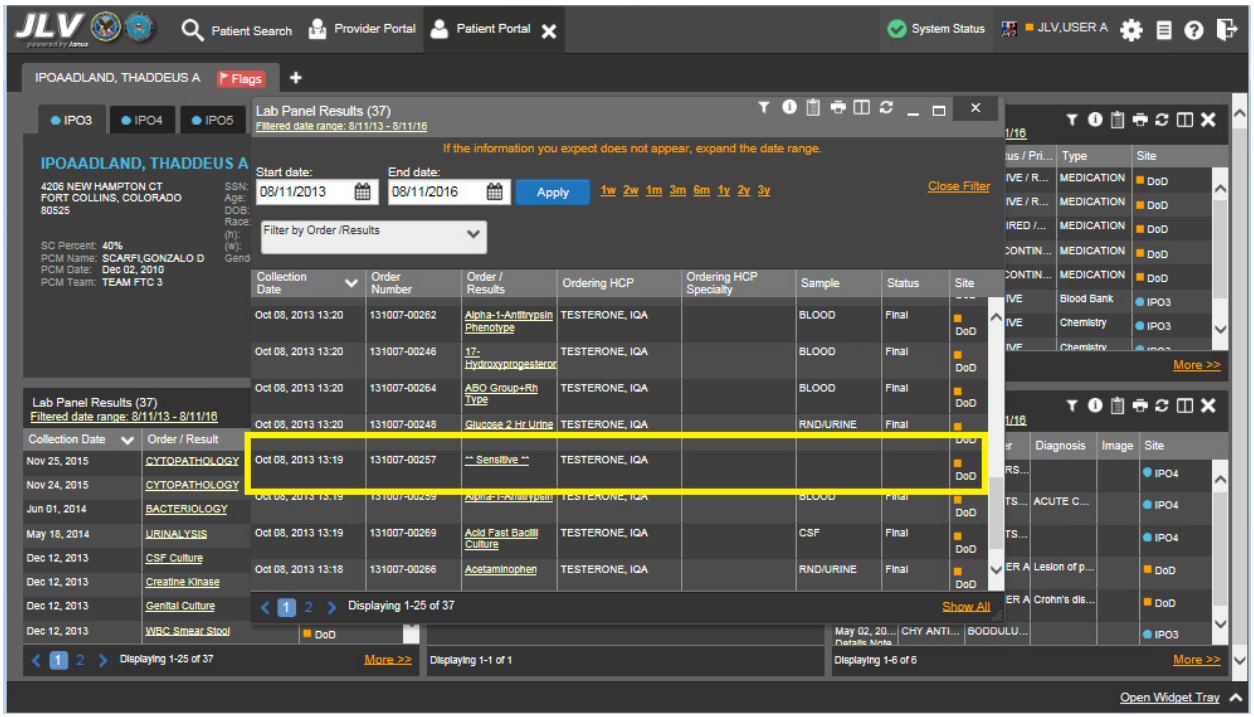


4.9.13.2 Viewing Sensitive Data in the Lab Panel Results Widget

JLV masks the display of sensitive records in the **Lab Panel Results** widget (****Sensitive**** record example shown in the following figure). JLV users may access the record but will be audited each time a sensitive DoD record is viewed.

After clicking the hyperlink in the Order/Results column for a record masked as sensitive, JLV will notify the user that he/she will be audited. This message is triggered each time a user clicks a sensitive record. After the user selects his/her purpose to view the record and agrees to be audited, sensitive data will appear in the Details view but the record will remain masked in the minimized and expanded views of the widget.

Figure 93: Lab Panel Results Widget – Masked Sensitive Record



4.9.13.3 Viewing Lab Panel Results Details

Click a hyperlinked entry in the Order/Results column of the **Lab Panel Results** widget to open a separate window containing a report of the record. The contents of the window may vary depending on the lab type and what is contained in the patient record.

NOTE: The time zone for time stamps displayed in the Collection Date column will vary depending on the source of the data. The Collection Date column time stamps for DoD Armed Forces Health Longitudinal Technology (AHLTA) data represents Zulu time while the Collection Date column time stamps for DoD CHCS and VA records represent local time.

Figure 94: Lab Panel Results Details Window (DoD Record)

4.9.13.4 Display and Filter Options

Display and filter options within the **Lab Panel 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Specify the date range for which records will be 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. When a date range filter is applied in an open widget, the date range is displayed in the widget header. Open or close the filter options by clicking on the date range in the header.
- Use the **Filter by Order/Results** drop-down box to re-draw the widget to show only the records for the selected result(s).

4.9.13.5 Terminology Normalization in the Lab Panel Results Widget

Terminology normalization is provided in the **Lab Panel Results** widget through the following GUI elements:

- The data in the Ordering HCP and Ordering HCP Specialty columns in the widget are normalized to the National Uniform Claim Committee Taxonomy (NUCC) standard. Hovering over the entries in these columns will display the standardized name and standardized code for the healthcare provider.

4.9.14 Lab Results

The **Lab Results** widget displays the patient's lab results 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 last lab results date.

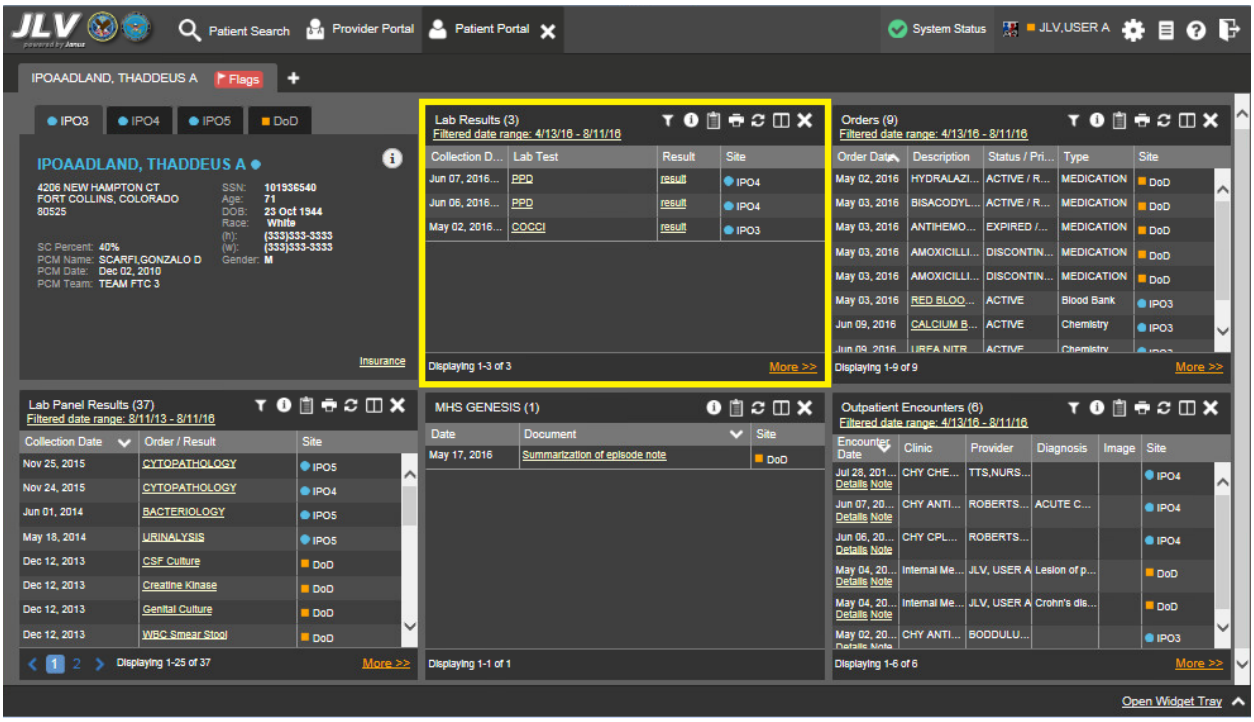
To open the widget, left-click **Lab Results** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

4.9.14.1 Lab Results Widget Data

In the minimized view of the **Lab Results** widget, the lab results information includes:

- Collection Date
- Lab Test
- Result
- Site

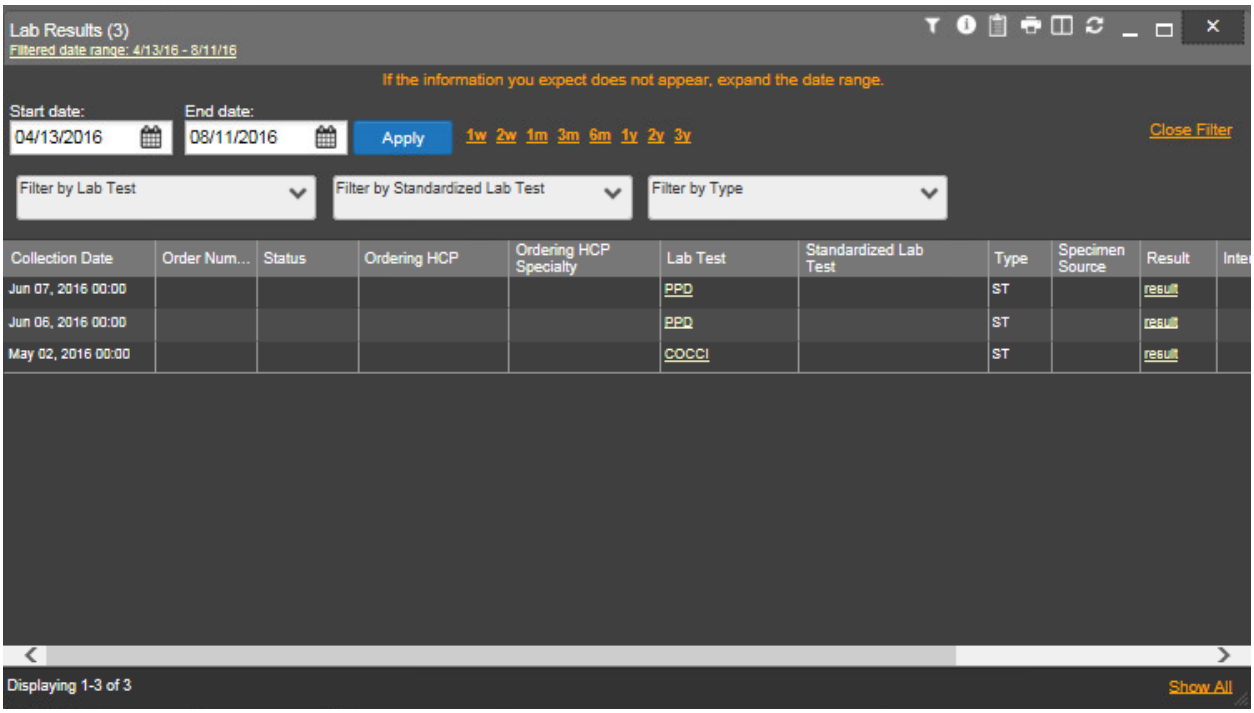
Figure 95: Lab Results Widget – Minimized View



Click **More** >> from the minimized view of the **Lab Results** widget to open an expanded view of the widget. In the expanded view, the lab results information includes:

- Collection Date
- Order Number
- Status
- Ordering HCP
- Ordering HCP Specialty
- Lab Test
- Standardized Lab Test
- Type
- Specimen Source
- Result
- Interpretation
- Units
- Ref Range
- Site

Figure 96: Lab Results Widget – Expanded View



NOTE: The following lab test abbreviations are used in the Type column of the expanded view of the **Lab Results** widget:

- CHEM for CH, COAG, HEM, HE, TOX, RIA, SER, and SEND
- MICRO for MI, MICROBIOLOGY, and BACT
- AP for ANATOMIC PATHOLOGY
- EM for ELECTRON MICROSCOPY
- SP for SURGICAL PATHOLOGY
- ST for SKIN or SKIN TEST
- CY for CYTOLOGY
- AU for AUTOPSY
- BB for BLOOD BANK
- H.I.V for Human Immunodeficiency Virus (HIV) (For DoD results only)

4.9.14.2 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.

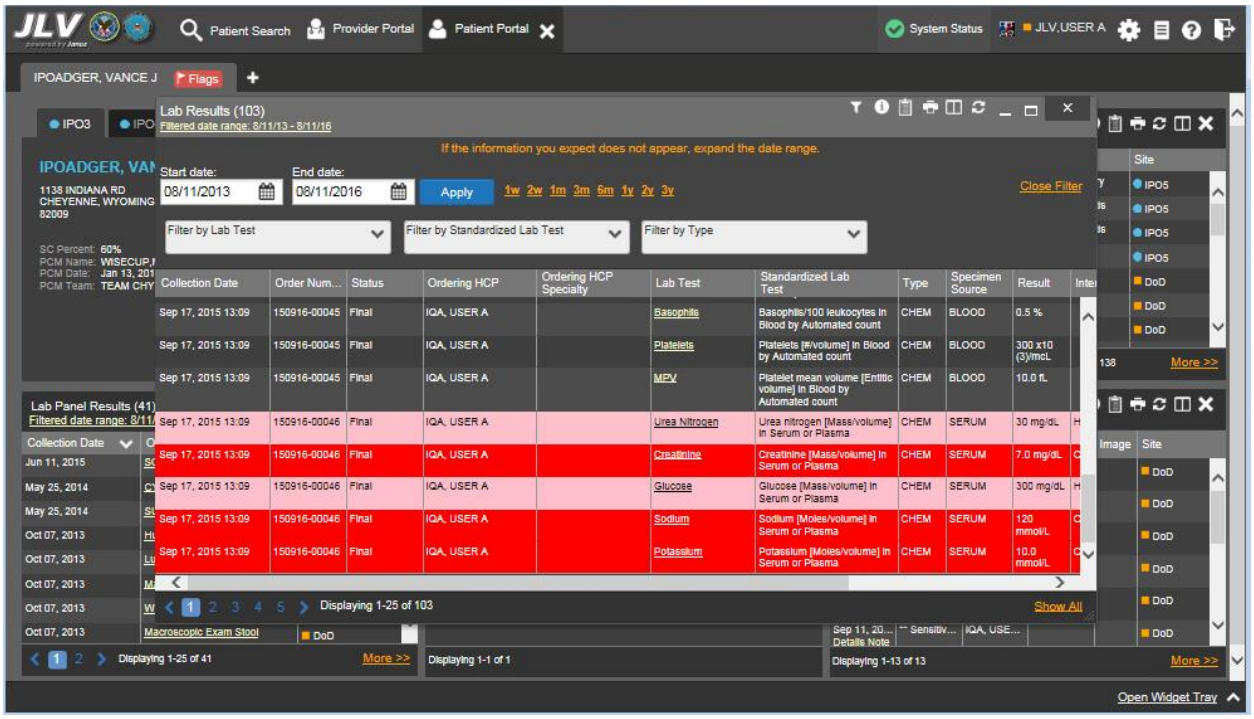
- Specify the date range for which records will be displayed in the widget using the **Quick Date Range Selector** or the **Start Date** and **End Date** calendars. If the information you expect does not appear in the widget display, use the **Start Date** and **End Date** filter options to expand the date range. When a date range filter is applied in an open widget, the date range is displayed in the widget header. Open or close the filter options by clicking on the date range in the header.
- Use the **Filter by Lab Test** drop-down box to re-draw the widget to show only the records for the selected test(s).
- Use the **Filter by Standardized Lab Test** drop-down box to re-draw the widget to show only the records for the selected test(s).
- Use the **Filter by Type** drop-down box to re-draw the widget to show only the records for the selected type(s).
- Use **Graph View** to display multiple records of the same type in a graph. Refer to Section 4.9.14.7, Graph View in the Lab Results Widget for more information.
- Use **Table View** to display multiple records of the same type in a tabular format. Refer to Section 4.9.14.7, Graph View in the Lab Results Widget for more information.

4.9.14.3 Viewing Abnormal Results in the Lab Results Widget

For records in the **Lab Results** widget where result values fall within a calculated reference range for abnormal within the originating source system, JLV will highlight the row for that record 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 (i.e., H* or L*) or the result is critical. Examples of highlighted abnormal records are shown in the expanded view of the **Lab Results** widget in the following figure.

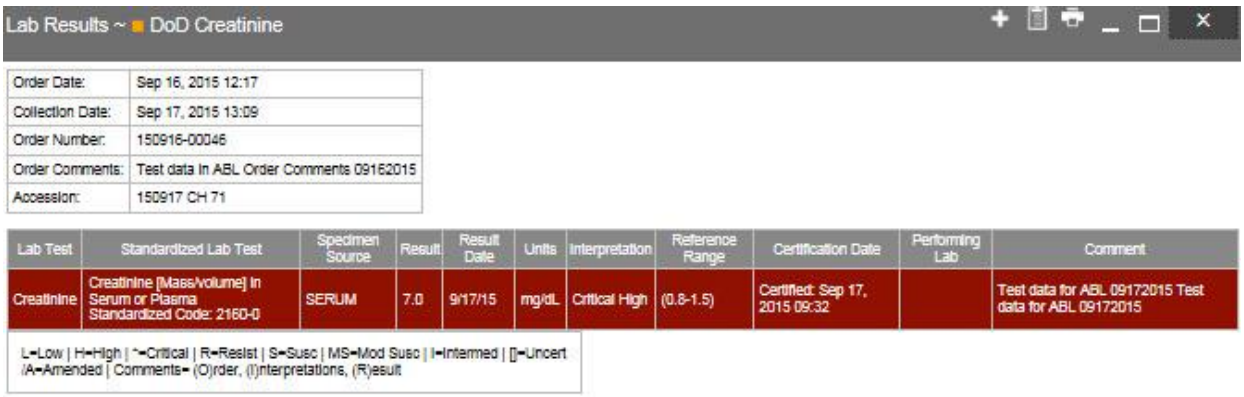
Figure 97: Lab Results Widget – Abnormal Results



4.9.14.4 Viewing Lab Results Details

Clicking a hyperlinked entry in the Lab Test column of the Lab Results widget opens a separate window containing a report of the record. The following figure shows a sample DoD record. The contents of the window may vary depending on the lab type and what is contained in the patient record.

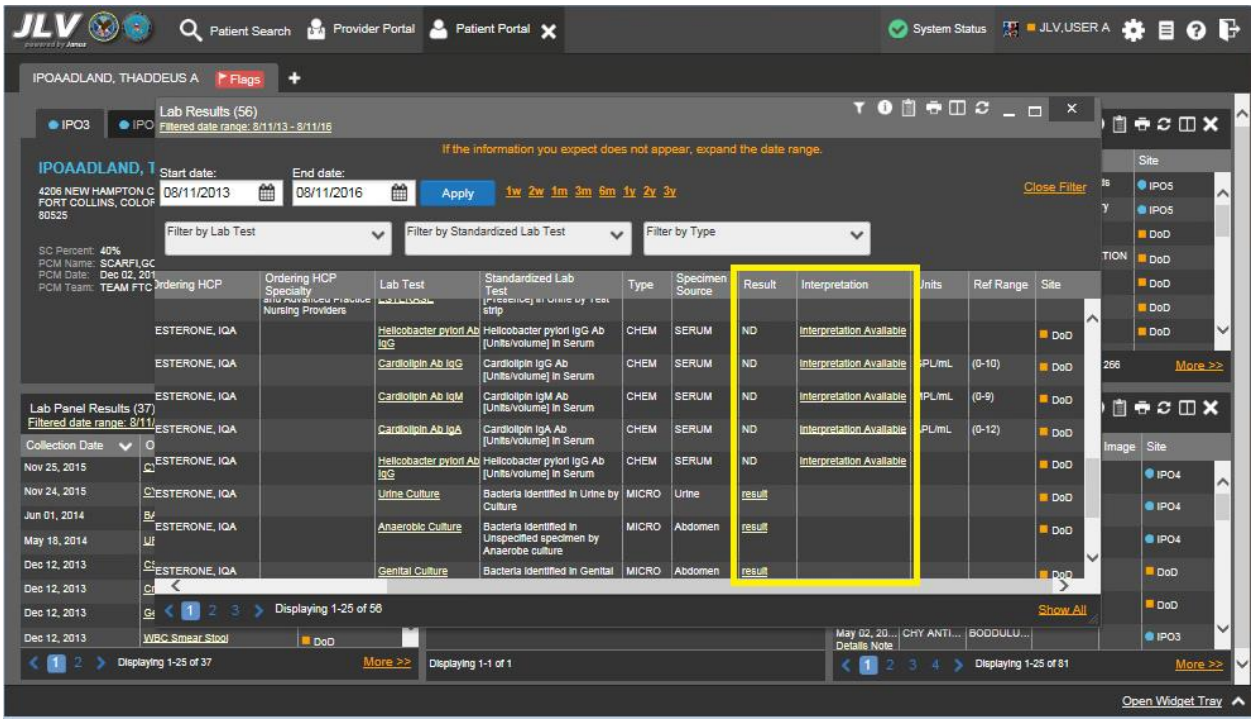
Figure 98: Lab Results Widget – Details View (DoD Record)



4.9.14.5 Viewing Results and Interpretations in the Lab Results Widget

For records in the **Lab Results** widget where result values and interpretation are available in a record, JLV will display links in the Result and Interpretation columns in the expanded views of the widget to indicate additional information is available.

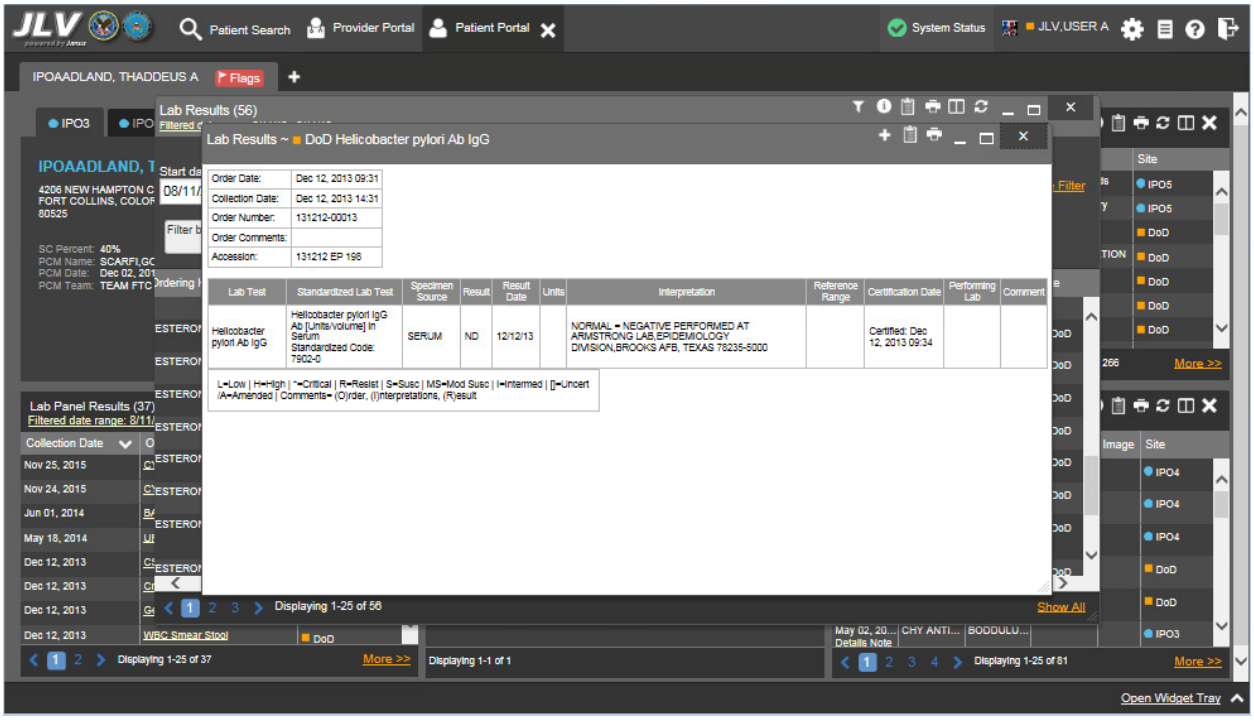
Figure 99: Lab Results Widget – Result and Interpretation Links



The previous figure highlights multiple result and interpretation links within the two columns.

The following example displays a sample interpretation. The contents of the window may vary depending on the lab type and what is contained in the patient record.

Figure 100: Lab Results Widget – Interpretation Details



4.9.14.6 Table View in the Lab Results Widget

The **Lab Results** widget provides the 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. Left-click **Lab Results** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.
2. Click **More** >> from the minimized view of the **Lab Results** widget to open an expanded view of the widget.
3. In the expanded view, select one entry from the **Filter by** drop down boxes (except for the Filter by Type filter option). This action enables the Show Graph and Show Table links.

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

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

4.9.14.7 Graph View in the Lab Results Widget

The **Lab Results** widget provides the 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. Left-click **Lab Results** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.
2. Click **More** >> from the minimized view of the **Lab Results** widget to open an expanded view of the widget.
3. In the expanded view, select an available filter from the **Filter by** drop down boxes (except for the Filter by Type filter option). This action enables the Show Graph and Show Table links.

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

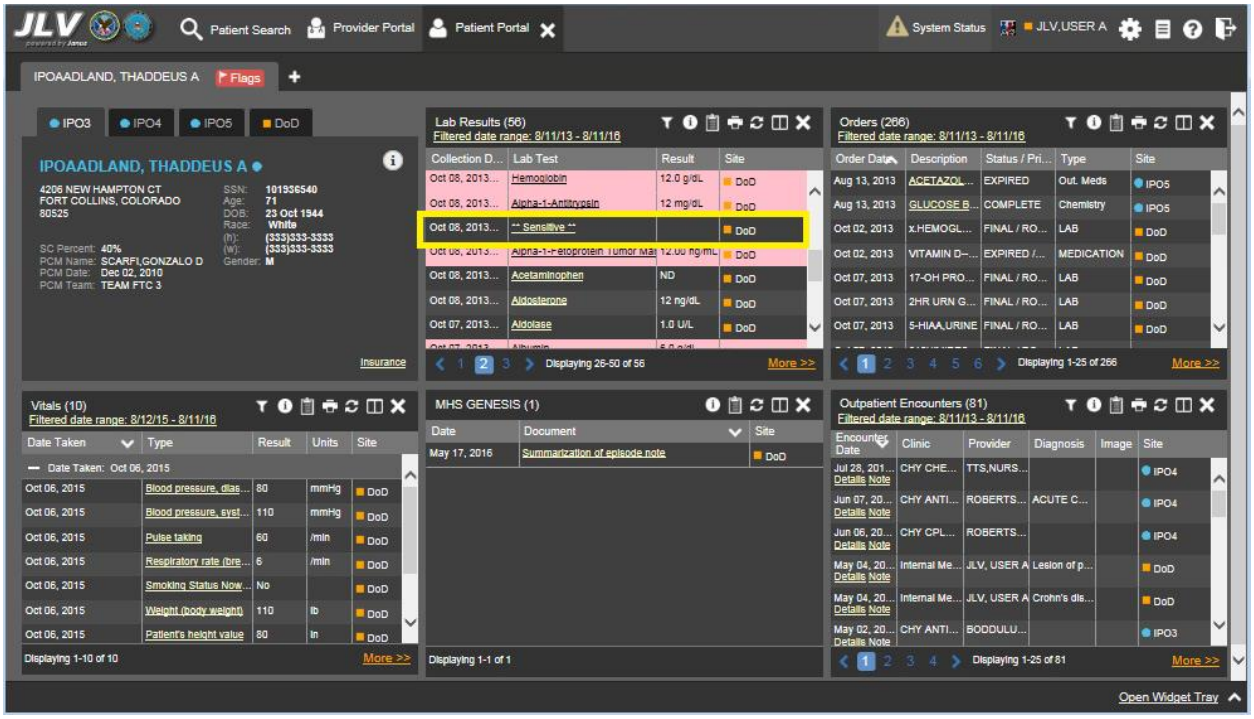
4. Click Show Graph.
5. A separate window opens, displaying a graph of the multiple records of the type selected in the filter.

4.9.14.8 Viewing Sensitive Data in the Lab Results Widget

JLV masks the display of sensitive records in the **Lab Results** widget (**** Sensitive **** record example shown in the following figure). JLV users may access the record but will be audited each time a sensitive DoD record is viewed.

After clicking the hyperlink in the Lab Test column for a record masked as sensitive, JLV will notify the user that he/she will be audited. This message is triggered each time a user clicks a sensitive record. After the user selects his/her purpose to view the record and agrees to be audited, sensitive data will appear in the Details view but the record will remain masked in the minimized and expanded views of the widget.

Figure 101: Masked Sensitive Note in Lab Results Widget



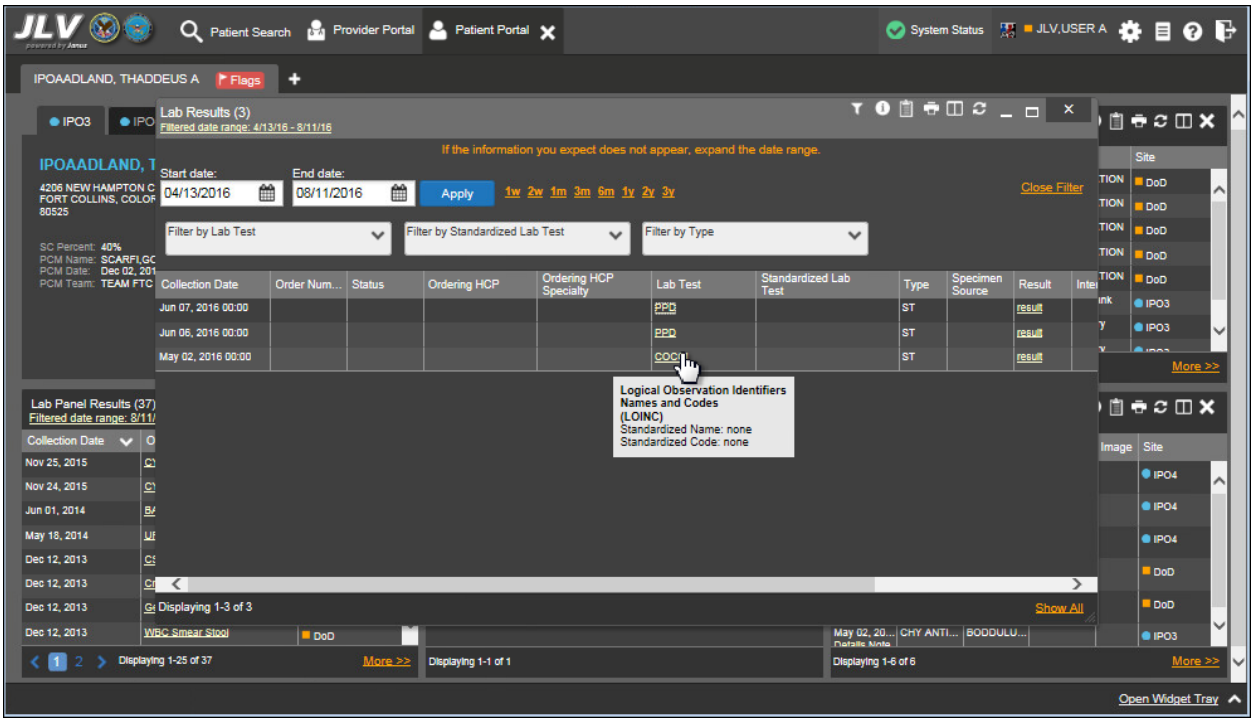
4.9.14.9 Terminology Normalization in the Lab Results Widget

Terminology normalization is provided in the Lab Results widget through the following GUI elements:

- The Lab Test column displays the name of a lab test within the patient's record. Hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain Logical Observation Identifiers Names and Codes (LOINC), the standardized lab test name, and the standardized code for that test.
- The Standardized Lab Test column displays the standardized name for the corresponding entry in the Lab Test column, mapped to the LOINC standard. In addition to the standardized name, hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (LOINC), and the standardized code for that test.

The following example highlights a lab test mapped to the LOINC standard. The standardized name and standardized code are displayed in the hover text over the record in the Lab Test column.

Figure 102: Lab Results Widget – Terminology Normalization



4.9.15 MHS GENESIS

The **MHS GENESIS** widget displays documents within the patient's record from the Military Health System (MHS) GENESIS system. The information is displayed in reverse chronological order by date.

To open the widget, left-click **MHS GENESIS** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

4.9.15.1 MHS GENESIS Widget Data

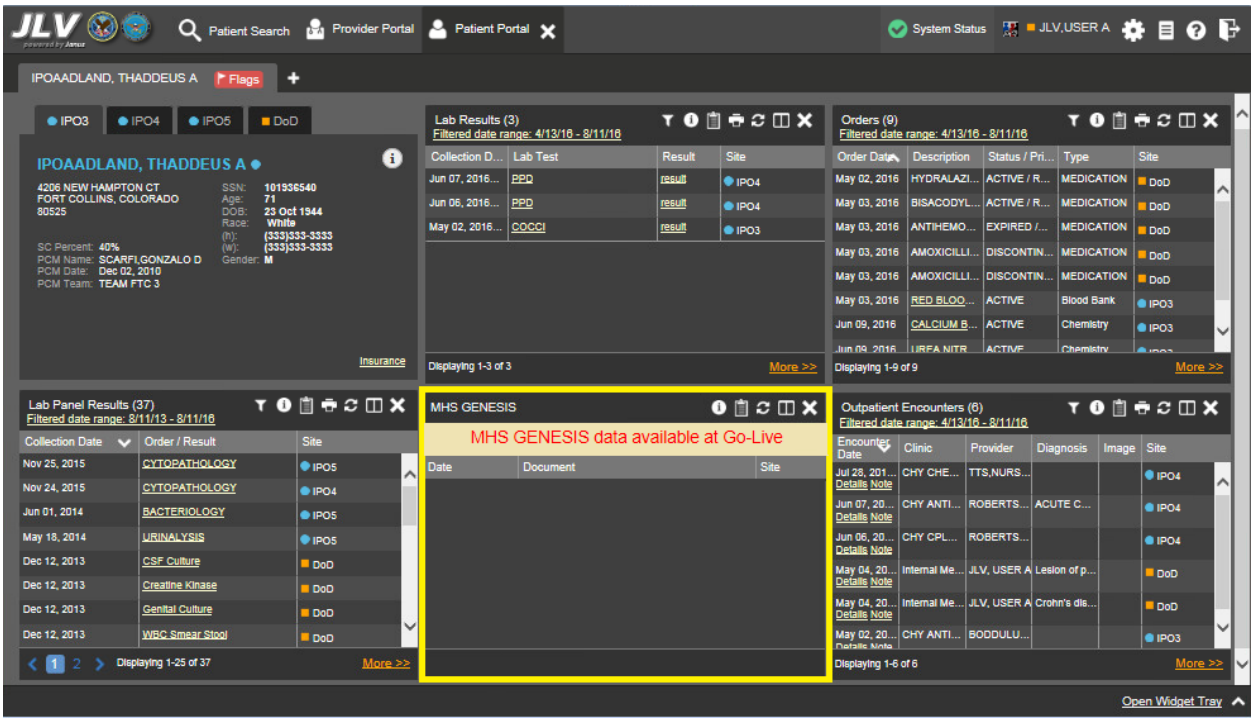
In the minimized view of the **MHS GENESIS** widget, the orders information includes:

- Date
- Document
- Site

Click the hyperlink in the Document column of either view of the **MHS GENESIS** widget to open a separate window displaying a Consolidated Clinical Document Architecture (CCDA) document.

NOTE: There will not be data populated in this widget until Feb 2017.

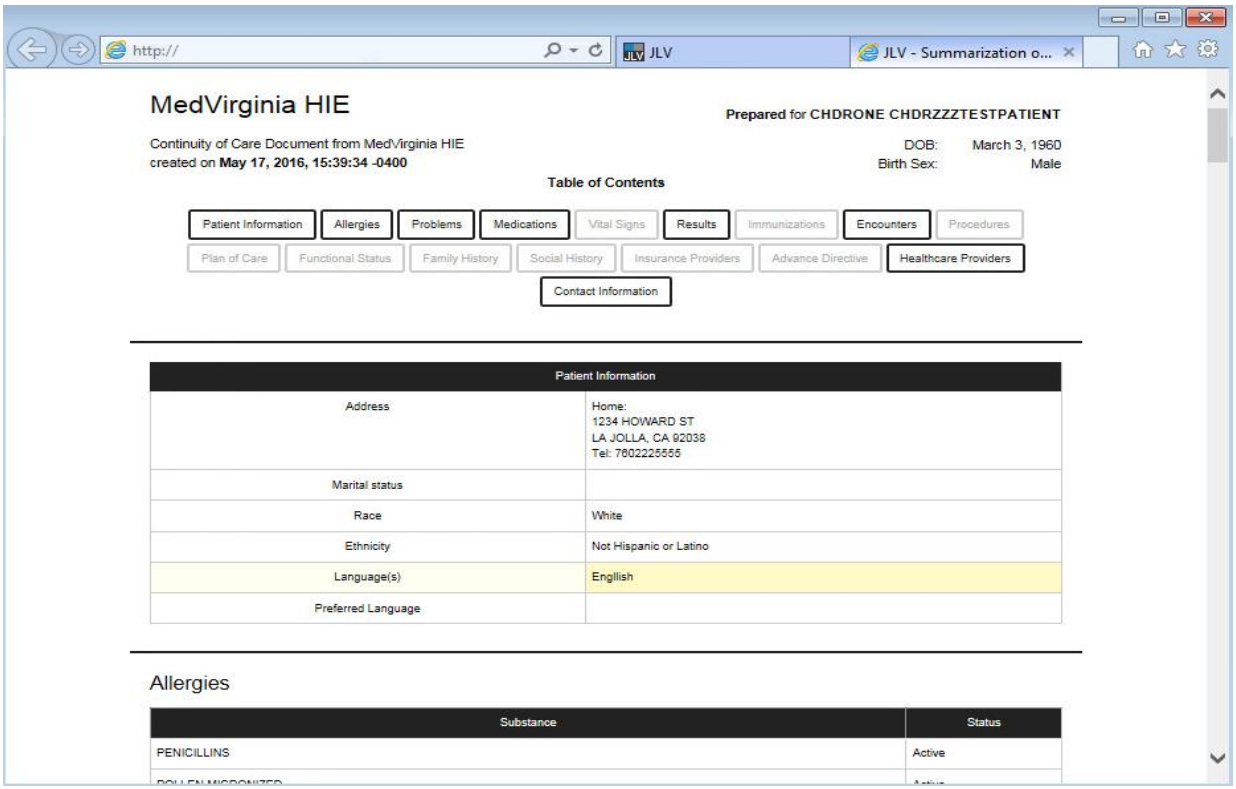
Figure 103: MHS GENESIS Widget – Minimized View



4.9.15.2 Viewing MHS GENESIS Documents

Click the hyperlink in the Document column from the **MHS GENESIS** widget to open a separate window displaying a CCDA document.

Figure 104: MHS GENESIS Widget – CCDA Document Display



4.9.16 Orders

The **Orders** widget displays the patient's medications, consults, radiology, and lab orders. The records are displayed in reverse chronological order by the order date.

To open the widget, left-click **Orders** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

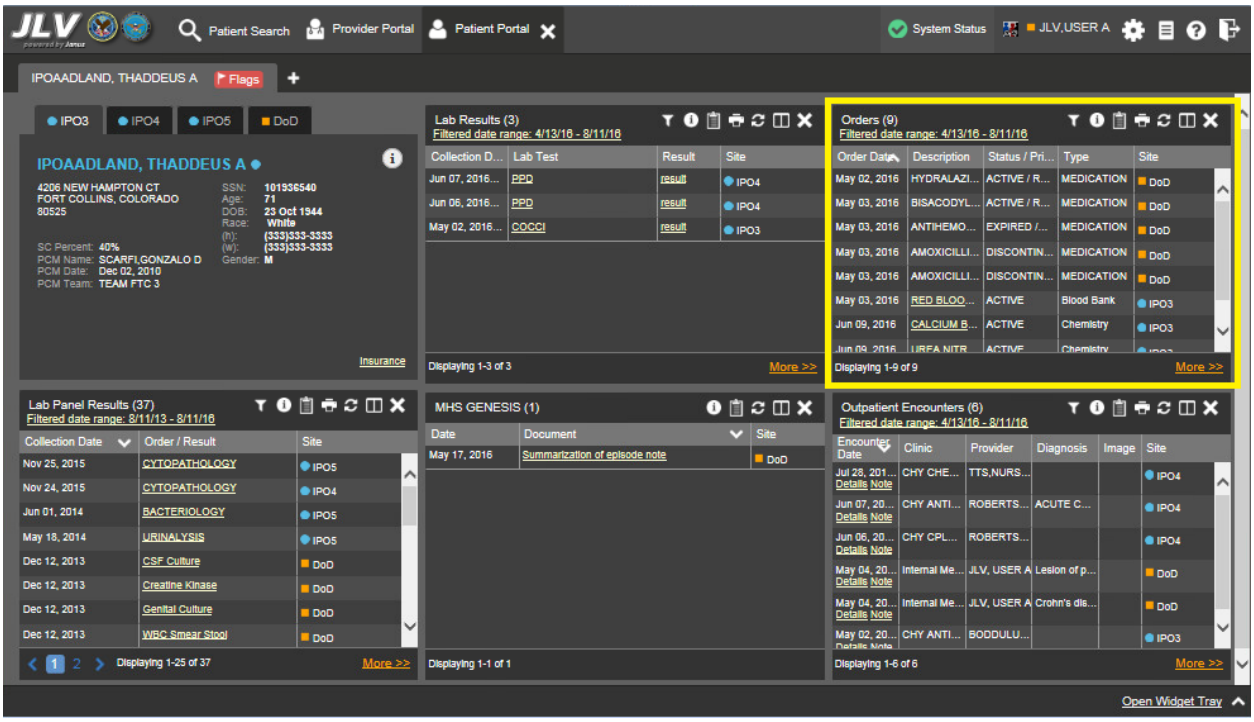
4.9.16.1 Orders Widget Data

In the minimized view of the **Orders** widget, the orders information includes:

- Order Date
- Description
- Status/Priority
- Type
- Site

Click the hyperlink in the Description column of either view of the **Orders** widget to open a separate window containing the detail of the order. Refer to Section 4.9.16.2, Viewing Order Details for more information.

Figure 105: Orders Widget – Minimized View

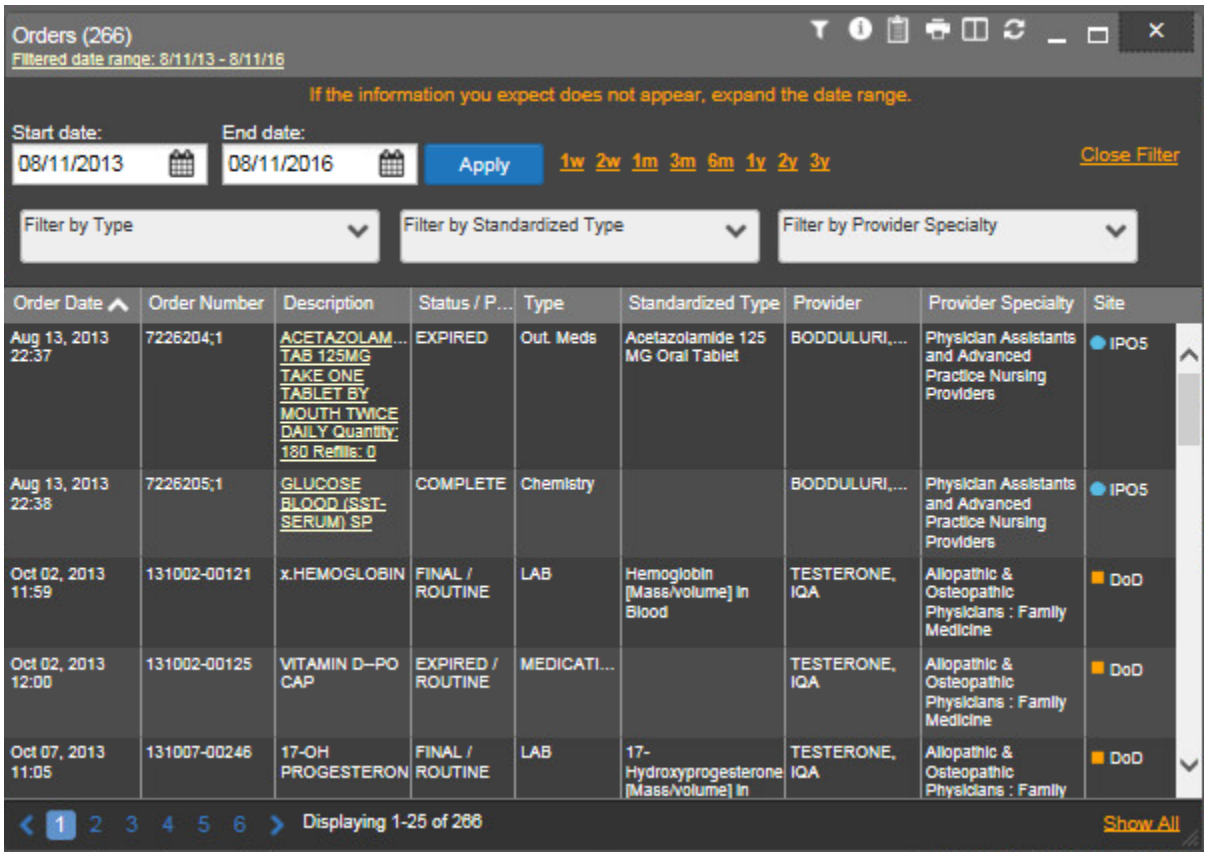


Click **More** >> from the minimized view of the **Orders** widget to open an expanded view of the widget. In the expanded view, the orders information includes:

- Order Date
- Order Number
- Description
- Status/Priority
- Type
- Standardized Type
- Provider
- Provider Specialty
- Site

Click the hyperlink in the Description column of either view of the **Orders** widget to open a separate window containing the detail of the order. Refer to Section 4.9.16.2, Viewing Order Details for more information.

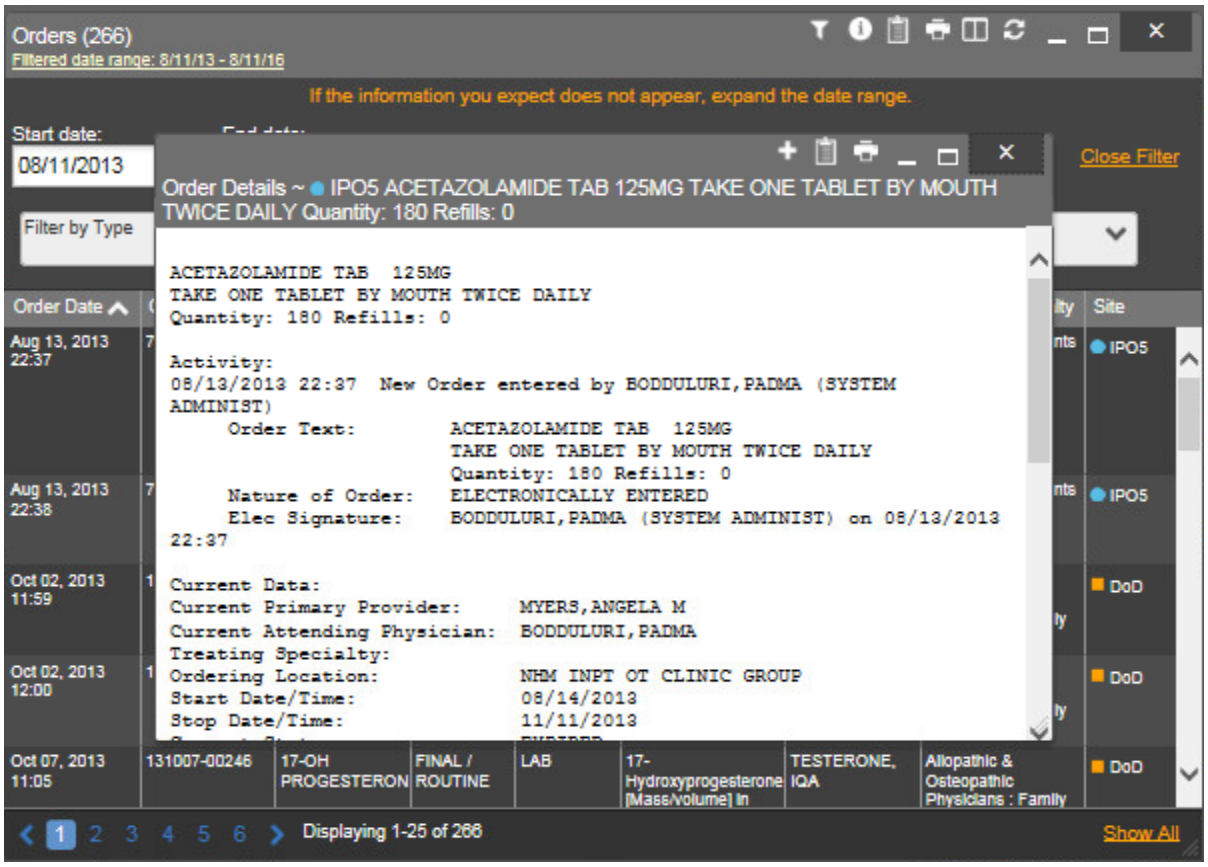
Figure 106: Orders Widget – Expanded View



4.9.16.2 Viewing Order Details

Click the hyperlink in the Description column of either view of the **Orders** widget to open a separate window containing the detail of the order. A Details view is available for VA orders only.

Figure 107: Orders Widget – Details View (VA Record Only)



4.9.16.3 Display and Filter Options

Display and filter options within the **Orders** 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Specify the date range for which records will be 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. When a date range filter is applied in an open widget, the date range is displayed in the widget header. Open or close the filter options by clicking on the date range in the header.
- Use the **Filter by Type** drop-down box to re-draw the widget to show only the records for the selected order type(s).

- Use the **Filter by Standardized Type** drop-down box to re-draw the widget to show only the records for the selected order type(s).
- Use the **Filter by Provider Specialty** drop-down box to re-draw the widget to show only the records for the selected provider type(s).

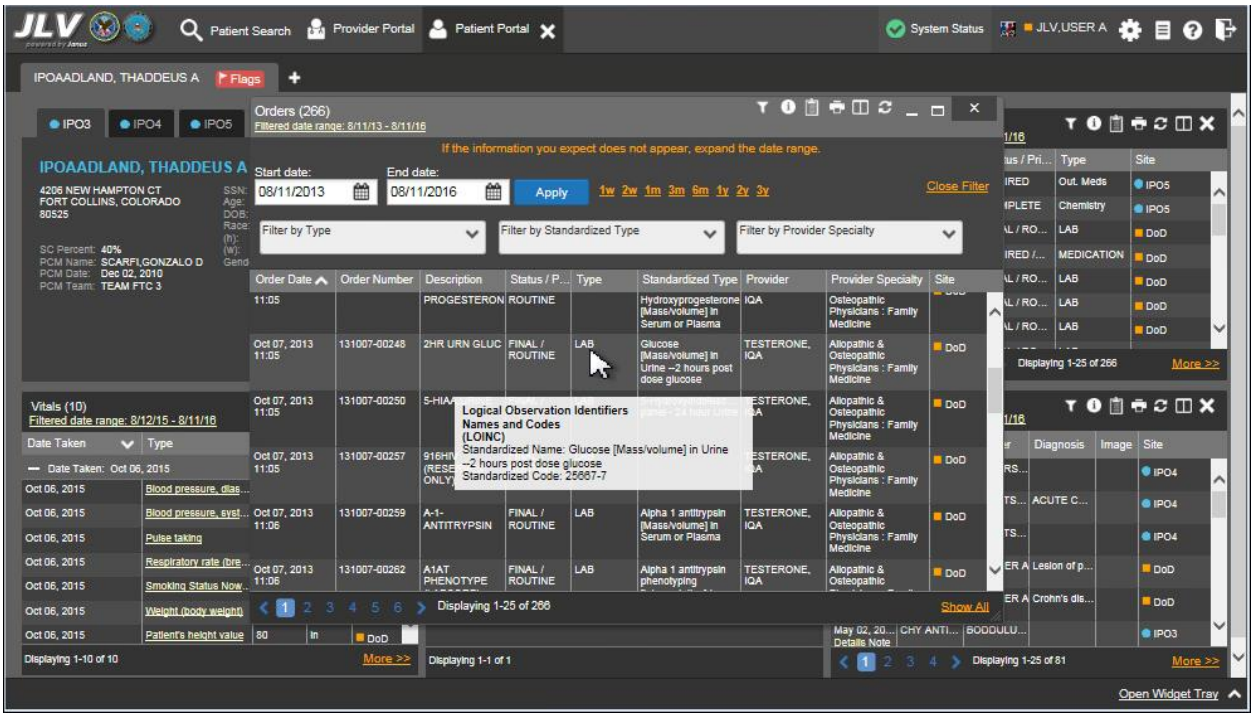
4.9.16.4 Terminology Normalization in the Orders Widget

Terminology normalization is provided in the **Orders** widget through the following GUI elements:

- The Description column displays the name for a type of order within the patient's record. Medication orders are mapped using the RxNorm standard. Laboratory and radiology orders are mapping using the LOINC standard. Hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (LOINC or RxNorm), the standardized name, and the standardized code for that order type.
- The Standardized Type column displays the standardized order type for the corresponding entry in the Type column, mapped to the LOINC or RxNorm standard. Medications orders are mapped using the RxNorm standard. Laboratory and radiology orders are mapping using the LOINC standard. In addition to the standardized name, hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (LOINC or RxNorm), and the standardized code for that order type.
- The data in the Provider and Provider Specialty columns in the widget are normalized to the National Uniform Claim Committee Taxonomy (NUCC) standard. Hovering over the entries in these columns will display the standardized name and standardized code for the provider.

The following example highlights an order mapped to the RxNorm standard. The standardized name and standardized code are displayed in the hover text over the record in the Description column.

Figure 108: Orders Widget – Terminology Normalization



4.9.17 Outpatient Encounters

The **Outpatient Encounters** widget includes clinical data for outpatient encounters.

To open the widget, left-click **Outpatient Encounters** from the patient widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

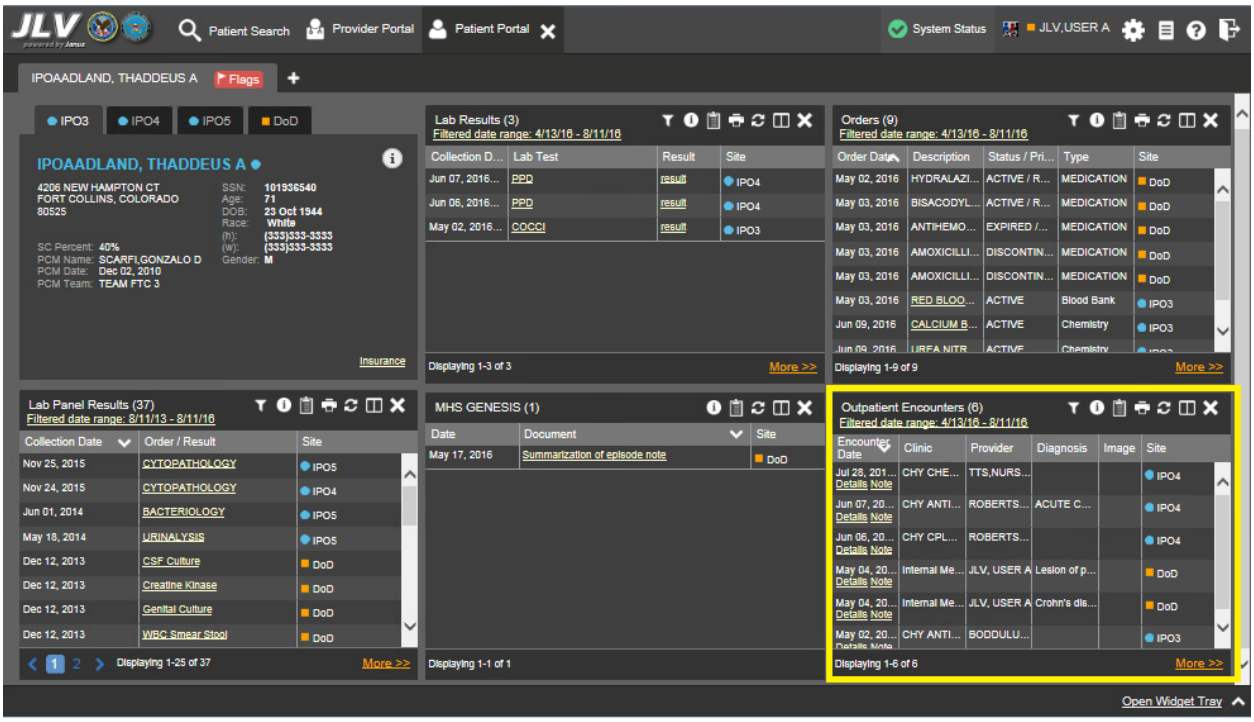
4.9.17.1 Outpatient Encounters Widget Data

In the minimized view of the **Outpatient Encounters** widget, the outpatient encounter information includes:

- Encounter Date
- Clinic
- Provider
- Diagnosis
- Image
- Site

Refer to Section 4.9.17.2, Viewing Outpatient Encounter Details and Section 4.9.14.2, Display and Filter Options for more information about the **Details** and **Note** links in the Encounter Date column.

Figure 109: Outpatient Encounters Widget – Minimized View



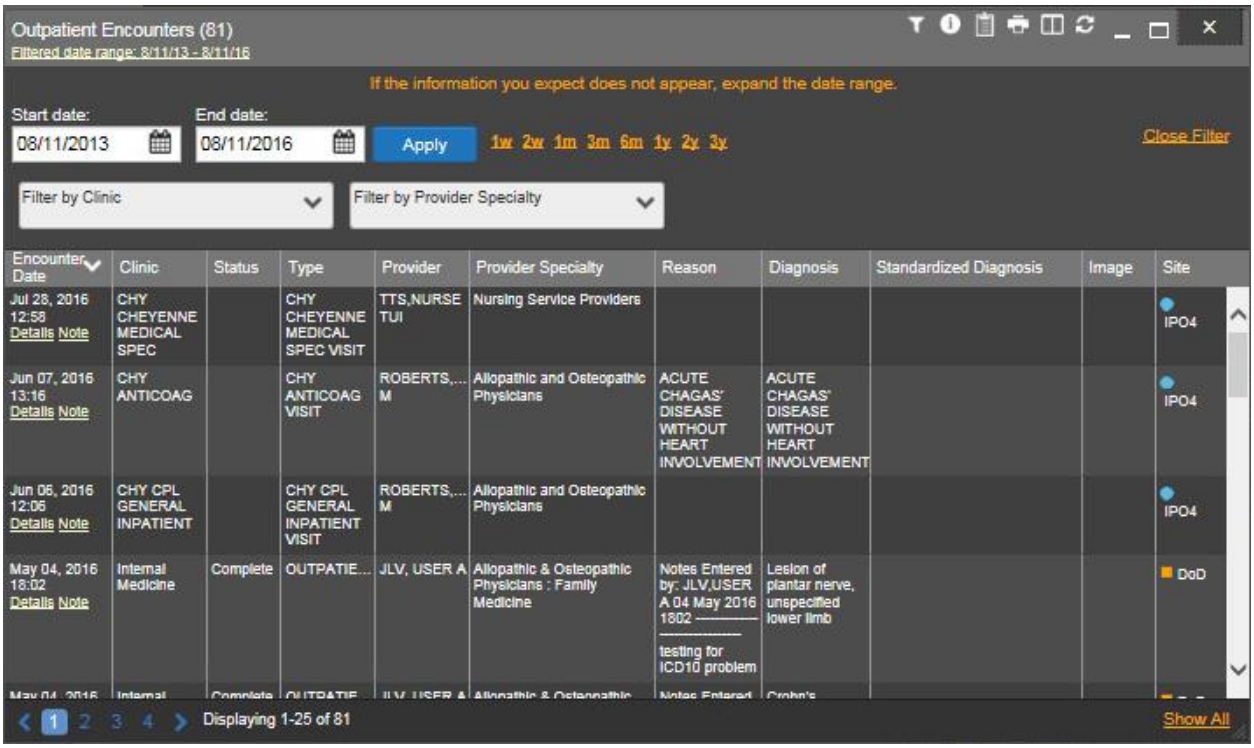
Click **More** >> from the minimized view of the **Outpatient Encounters** widget to open an expanded view of the widget. In the expanded view, the outpatient encounter information includes:

- Encounter Date
- Clinic
- Status
- Type
- Provider
- Provider Specialty
- Reason
- Diagnosis
- Standardized Diagnosis
- Image
- Site

Refer to Section 4.9.17.2, Viewing Outpatient Encounter Details and Section 4.9.14.2, Display and Filter Options for more information about the **Details** and **Note** links in the Encounter Date column.

A **camera** icon in the Image column indicates that one or more images are associated with that record. Clicking the **camera icon** from the column will open the VistA Imaging Viewer in a standalone window and display the associated image(s).

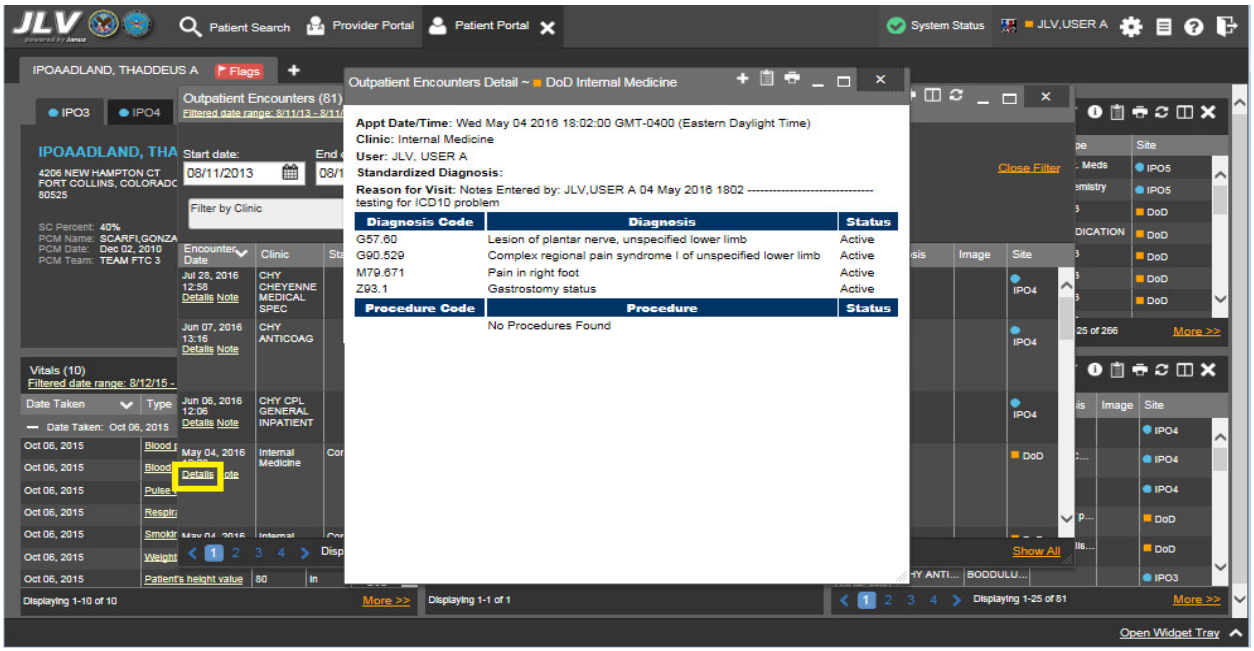
Figure 110: Outpatient Encounters Widget – Expanded View



4.9.17.2 Viewing Outpatient Encounter Details

Where available for the record, click the **Details** hyperlink in the Encounter Date column of either view of the **Outpatient Encounters** widget to open a separate window containing the detail of the encounter. The following example displays the details window for a DoD outpatient encounter.

Figure 111: Outpatient Encounter Details Window

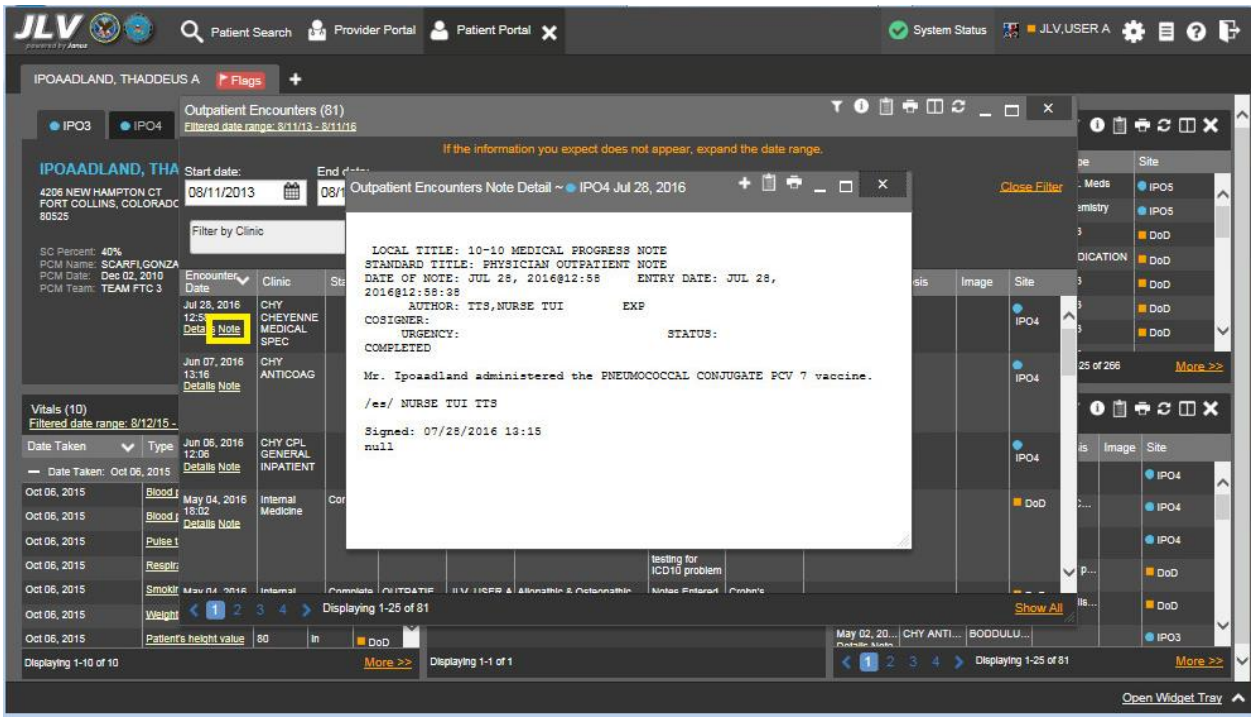


4.9.17.3 Viewing Outpatient Encounter Notes

Where available for the record, click the **Note** hyperlink in the Encounter Date column of either view of the **Outpatient Encounters** widget to view notes of the encounter record.

For DoD encounters, a user may be prompted to save the note content in PDF format after clicking the **Note** link in the Encounter Date column of the **Outpatient Encounters** widget. VA encounter notes will open in a separate window. The example in the following figure displays the note for a VA outpatient encounter.

Figure 112: Encounter Note Accessed from Outpatient Encounters Widget

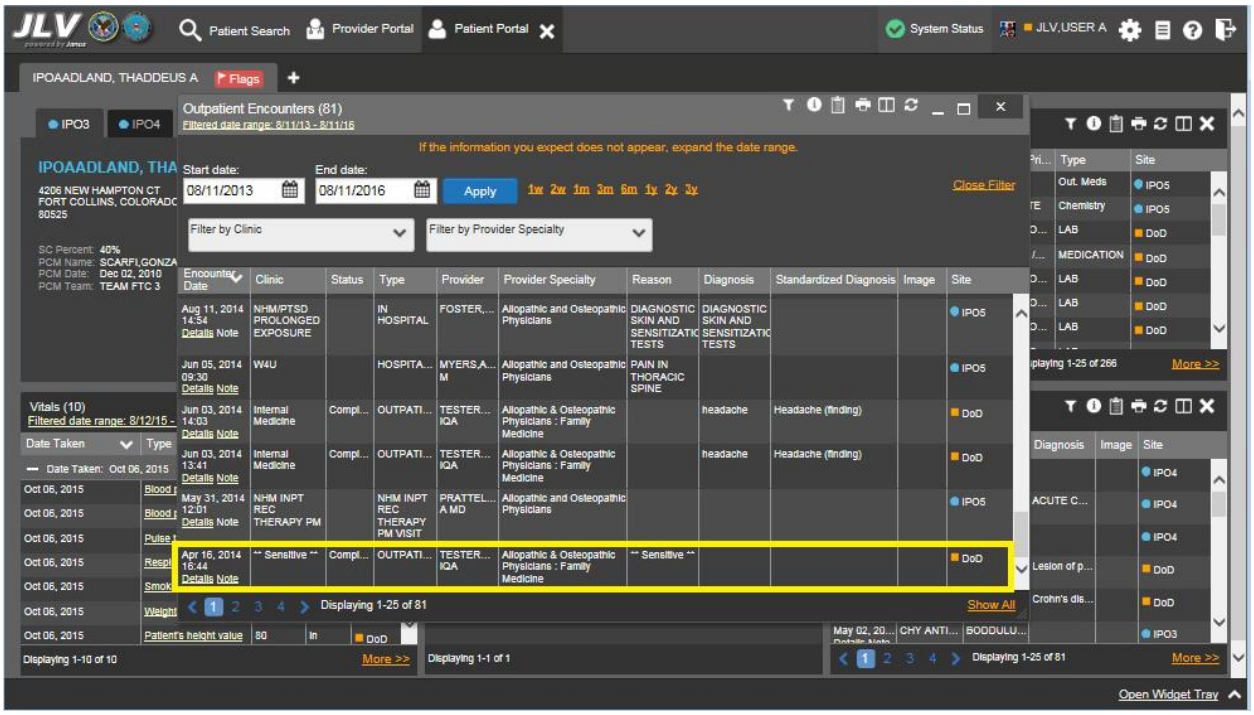


4.9.17.4 Viewing Sensitive Data in the Outpatient Encounters Widget

JLV masks the display of sensitive records in the **Outpatient Encounters** widget (****Sensitive**** record example shown in the following figure). JLV users may access the record but will be audited each time a sensitive DoD record is viewed.

After clicking the **Details** or **Note** hyperlink in the Encounter Date column for a masked record, JLV will notify the user that he/she will be audited. This message is triggered each time a user clicks a sensitive record. After the user selects his/her purpose to view the record and agrees to be audited, sensitive data will appear in the additional view but the record will remain masked in the minimized and expanded views of the widget.

Figure 113: Masked Sensitive Record in Outpatient Encounters Widget



4.9.17.5 Additional Display and Filter Options in the Outpatient Encounters Widget

Display and filter options within the **Outpatient Encounters** 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Specify the date range for which records will be 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. When a date range filter is applied in an open widget, the date range is displayed in the widget header. Open or close the filter options by clicking on the date range in the header.
- Use the **Filter by Clinic** drop-down box to re-draw the widget to show only the records for the selected clinic(s).
- Use the **Filter by Provider Specialty** drop-down box to re-draw the widget to show only the records for the selected provider type(s).

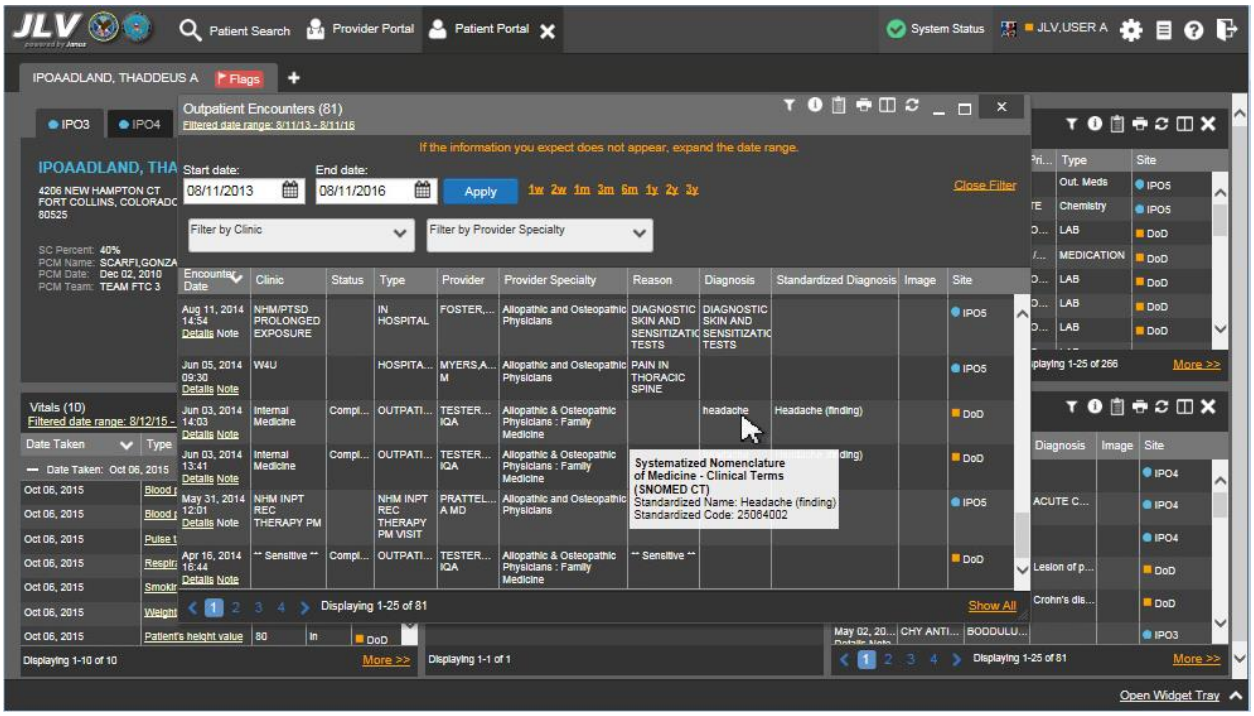
4.9.17.6 Terminology Normalization in the Outpatient Encounters Widget

Terminology normalization is provided in the **Outpatient Encounters** widget through the following GUI elements:

- The data in the Provider and Provider Specialty columns in the minimized and expanded views of the widget are normalized to the National Uniform Claim Committee Taxonomy (NUCC) standard. Hovering over the entries in these columns will display the standardized name and standardized code for the provider.
- The data in the Diagnosis and Standardized Diagnosis columns in the minimized and expanded views of the widget are normalized to the SNOMED CT standard. Hovering over the entries in these columns will display the standardized name and standardized code for the diagnosis.

The following example highlights a diagnosis mapped to the SNOMED CT standard. The standardized name and standardized code are displayed in the hover text over the record in the Diagnosis column.

Figure 114: Outpatient Encounters Widget – Terminology Normalization



4.9.18 Outpatient Medications

The **Outpatient Medications** widget displays the patient's outpatient medications information. The information is displayed in reverse chronological order by the last fill date.

To open the widget, left-click **Outpatient Medications** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

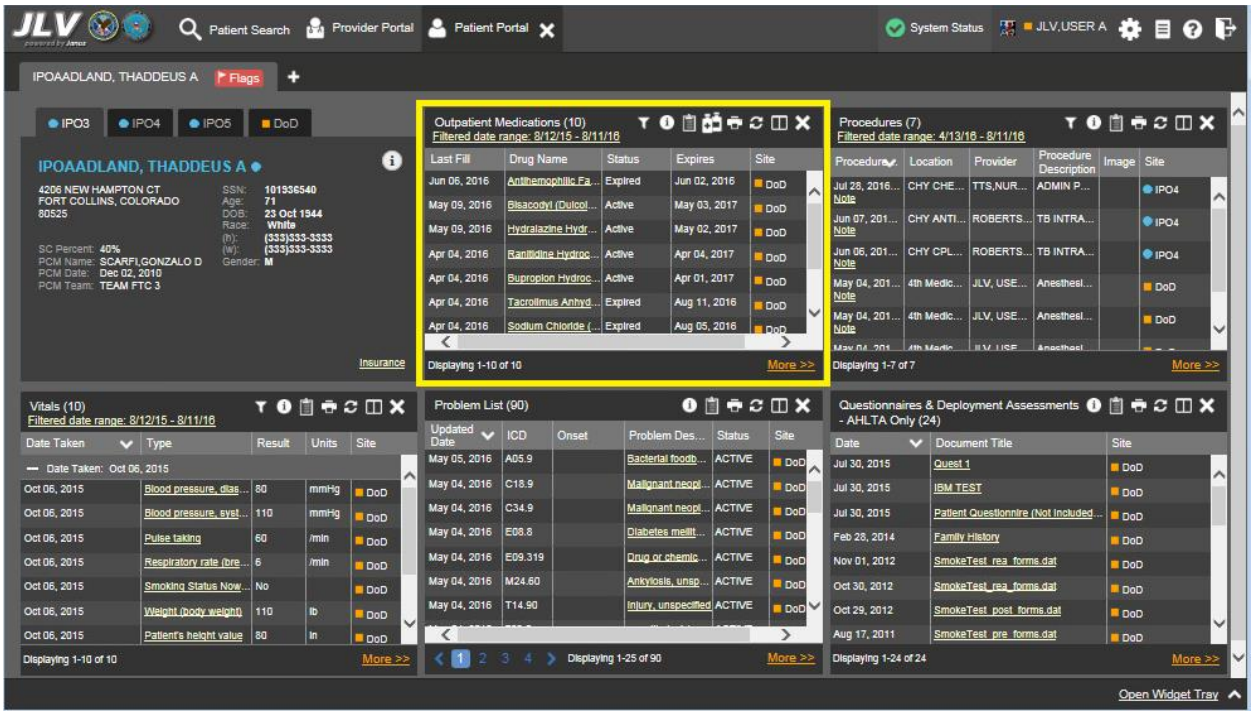
4.9.18.1 Outpatient Medications Widget Data

In the minimized view of the **Outpatient Medications** widget, the outpatient medications information includes:

- Last Fill
- Drug Name
- Status
- Expires
- Site

Click the hyperlink in the Drug Name column within either view of the widget to open a separate window containing details for that record. Refer to Section 4.9.18.3, Viewing Outpatient Medication Details for more information.

Figure 115: Outpatient Medications Widget – Minimized View

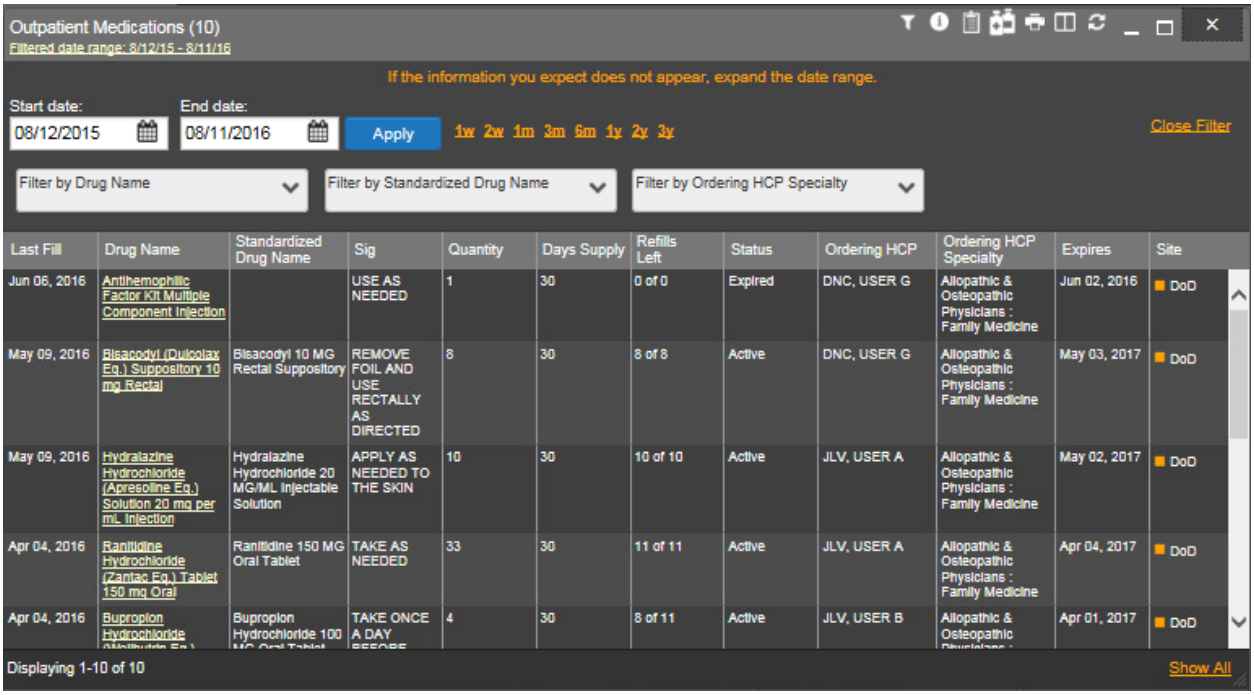


Click **More >>** from the minimized view of the **Outpatient Medications** widget to open an expanded view of the widget. In the expanded view, the outpatient medications information includes:

- Last Fill
- Drug Name
- Standardized Drug Name
- Sig

- Quantity
- Days Supply
- Refills Left
- Status
- Ordering HCP
- Ordering HCP Specialty
- Expires
- Site

Figure 116: Outpatient Medications Widget – Expanded View



4.9.18.2 Viewing Refill Histories

For VA outpatient medication records with remaining refills, JLV will provide a link to the refill history through the Refills Left column within the expanded view of the **Outpatient Medications** widget. Clicking the link opens a window providing the refill history of that record (a refill history example is highlighted in the following figure). When a medication shows remaining refills but the medication record has not been refilled (i.e., 5 of 5), JLV will not link to an additional window.

Figure 117: Outpatient Medications Widget – Refills Left Link (VA Record)

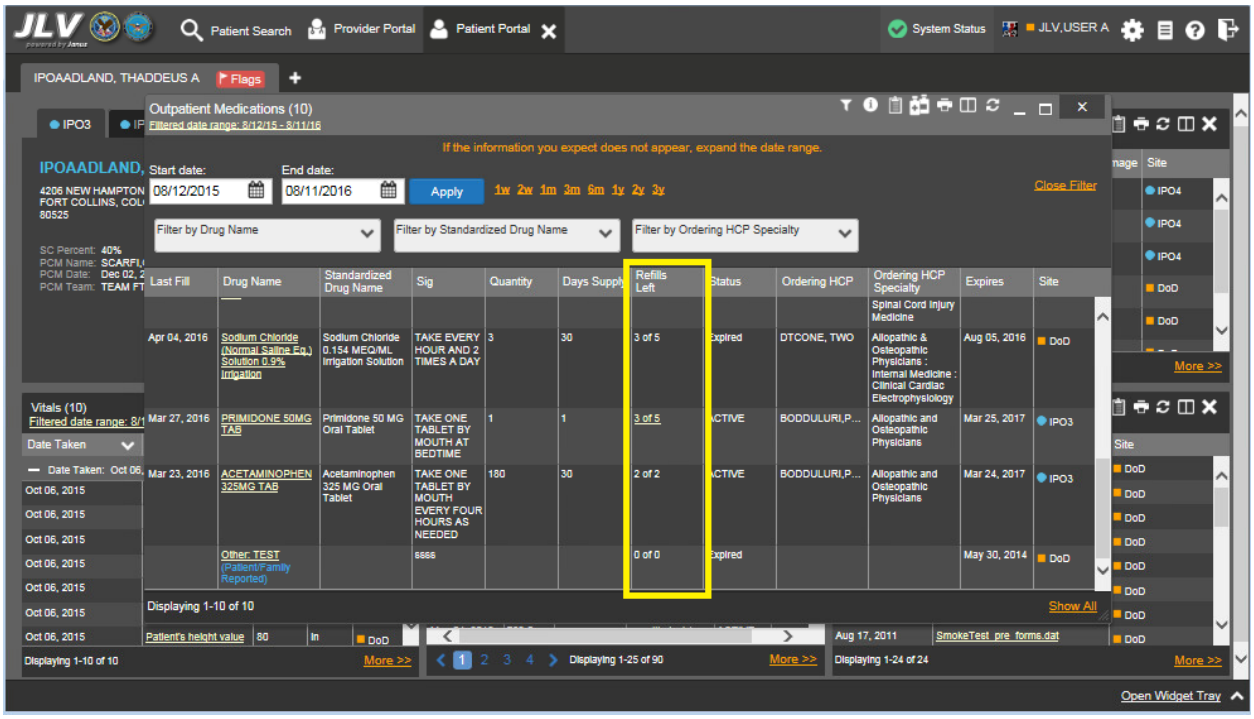
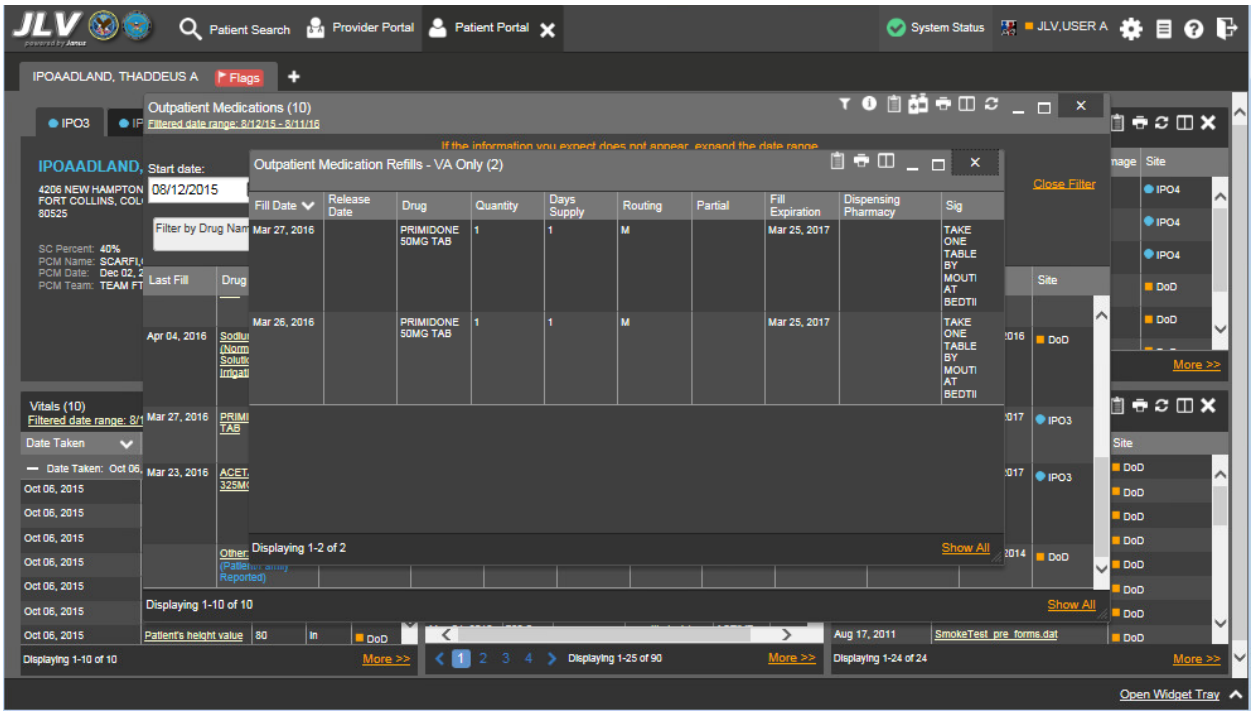


Figure 118: Outpatient Medications Widget – Refill Details (VA Record)



4.9.18.3 Viewing Outpatient Medication Details

Click the hyperlink in the Drug Name column from either view of the **Outpatient Medications** widget to open a separate window containing the detail of the medication. Where available in the record, this window will display the dispensing pharmacy.

Where found in the patient record, the details view of DoD outpatient medications displays all fill dates for a prescription (the history of all fill dates) in reverse chronological order.

NOTE: VA records will also have a link available from the Refills Left column when refills remain. After clicking this link, users will see report text displayed in the secondary window. Refer to Section 4.9.18.2, Viewing Refill Histories for more information.

Figure 119: Outpatient Medications Widget – Details of DoD Medication

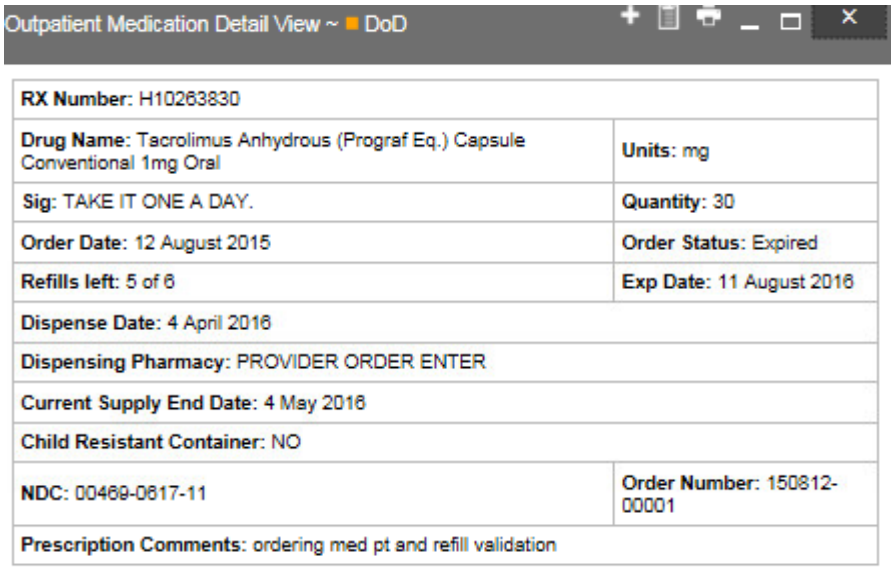
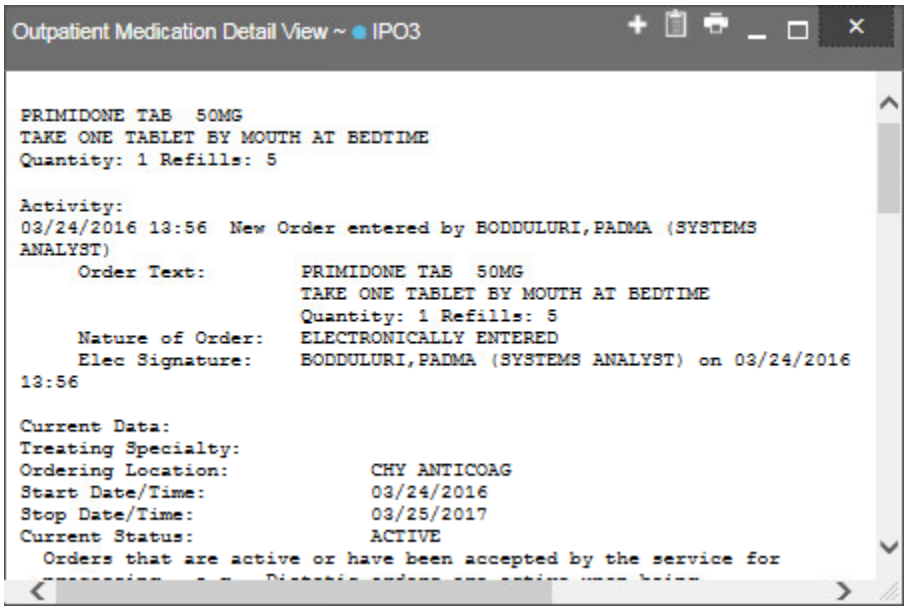


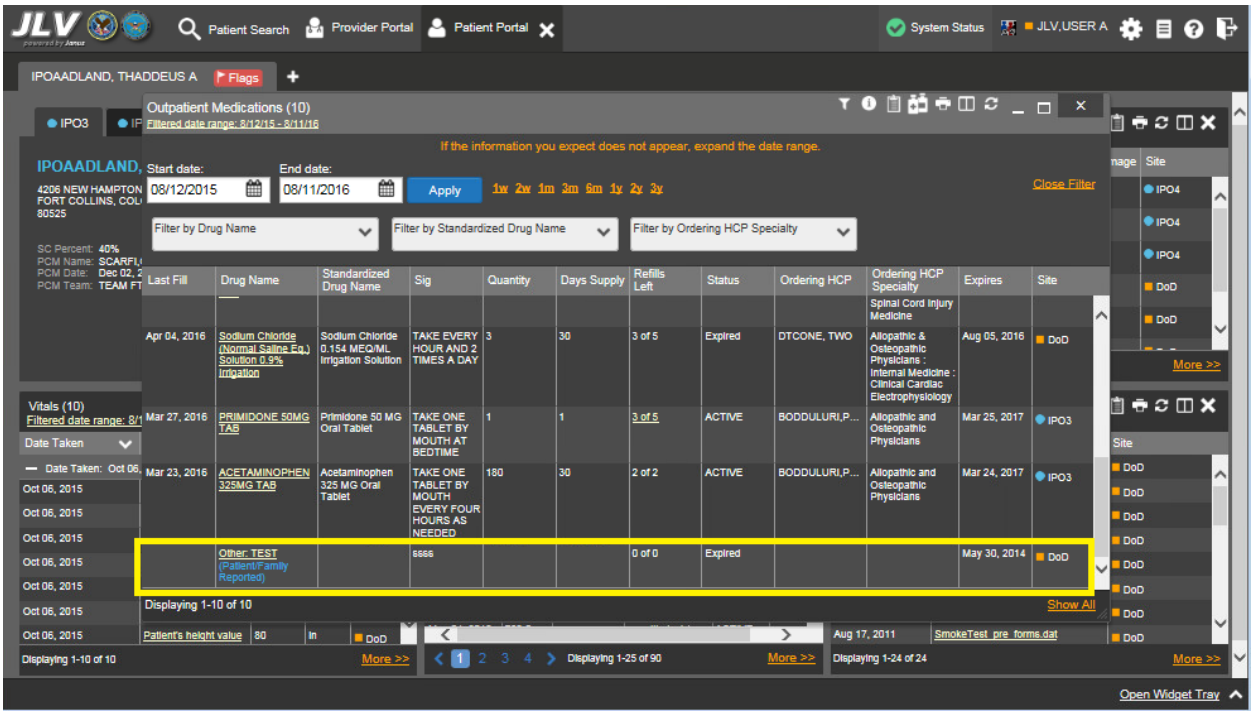
Figure 120: Outpatient Medications Widget – Details of VA Medication



4.9.18.4 Patient/Family Reported Outpatient Medication Display

Where entered in the patient's record, the Outpatient Medications widget will display the message Patient/Family Reported in the Drug Name column. This identifies when a medication is entered into a source system for documentation purposes only. Examples are highlighted in the following figure.

Figure 121: Outpatient Medications Widget – Family Reported Medication



4.9.18.5 Display and Filter Options

Display and filter options within the **Outpatient 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Specify the date range for which records will be 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. When a date range filter is applied in an open widget, the date range is displayed in the widget header. Open or close the filter options by clicking on the date range in the header.
- Click **Rx** from the widget toolbar to convert the medications data within the widget to text and opens text in a pop-up window.
- Use the **Filter by Drug Name** drop-down box to re-draw the widget to show only the records for the selected medication(s).
- Use the **Filter by Standardized Drug Name** drop-down box to re-draw the widget to show only the records for the selected medication(s).
- Use the **Filter by Ordering HCP Specialty** drop-down box to re-draw the widget to show only the records for the ordering HCP (provider).

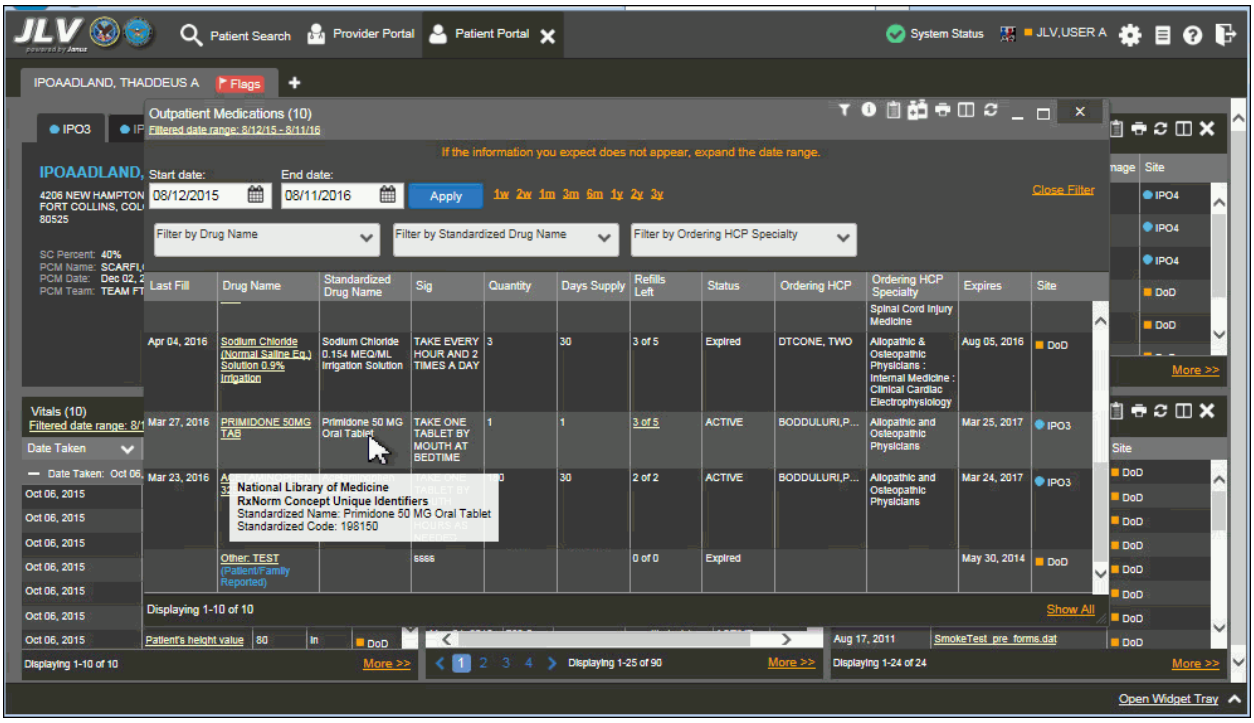
4.9.18.6 Terminology Normalization in the Outpatient Medications Widget

Terminology normalization is provided in the **Outpatient Medications** widget through the following GUI elements:

- The Drug Name column displays a prescription within the patient's record. Hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (RxNorm), the standardized RxNorm name, and the standardized RxNorm code for that prescription.
- The Standardized Drug Name column displays the standardized name for the corresponding entry in the Drug Name column, mapped to the RxNorm standard. In addition to the standardized name, hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (RxNorm), and the standardized code for that prescription.
- The data in the Ordering HCP and Ordering HCP Specialty columns in the minimized and expanded views of the widget are normalized to the National Uniform Claim Committee Taxonomy (NUCC) standard. Hovering over the entries in these columns will display the standardized name and standardized code for the ordering HCP (provider).

The following example highlights a medications record mapped to the RxNorm standard. The standardized name and standardized code are displayed in the hover text over the record in the Standardized Drug Name column.

Figure 122: Outpatient Medications Widget – Terminology Normalization



4.9.19 Problem List

The **Problem List** widget displays the patient's problem list information. The information is displayed in reverse chronological order by the last modified date.

To open the widget, left-click **Problem List** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

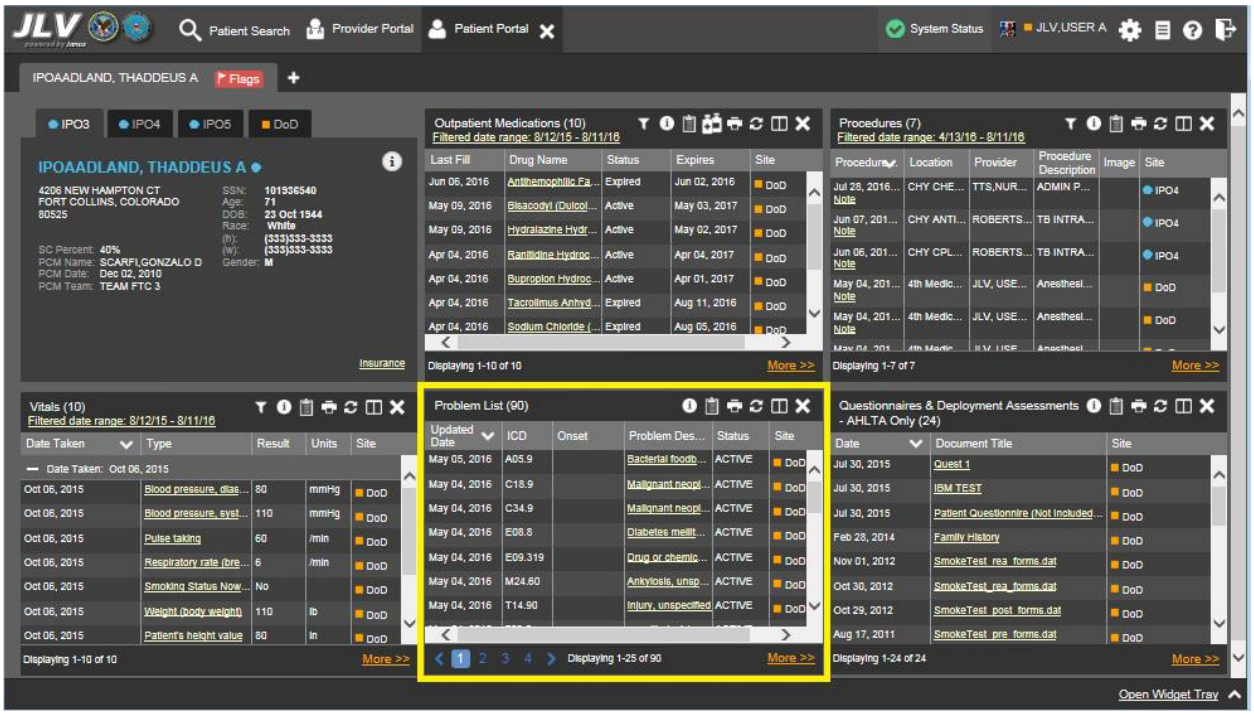
4.9.19.1 Problem List Widget Data

In the minimized view of the **Problem List** widget, the problem list information includes:

- Updated Date
- ICD
- Onset
- Problem Description
- Status
- Site

Click a hyperlinked entry in the Description column in either the minimized or expanded views of the widget to open a separate window containing the detailed report of the record. Refer to Section 4.9.19.2, Viewing Problem List Details for more information.

Figure 123: Problem List Widget – Minimized View

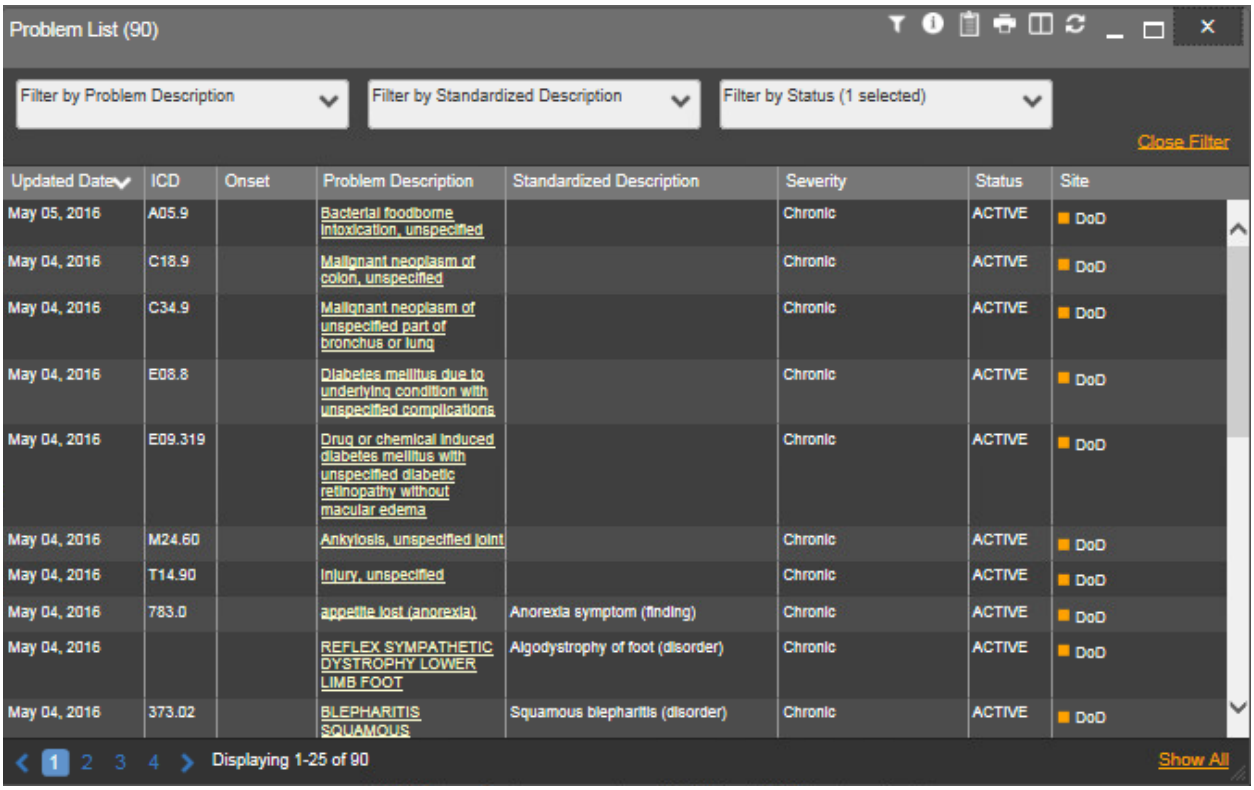


Click **More >>** from the minimized view of the **Problem List** widget to open an expanded view of the widget. In the expanded view, the problem list information includes:

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

Click a hyperlinked entry in the Description column in either the minimized or expanded views of the widget to open a separate window containing the detailed report of the record. Refer to Section 4.9.19.2, Viewing Problem List Details for more information.

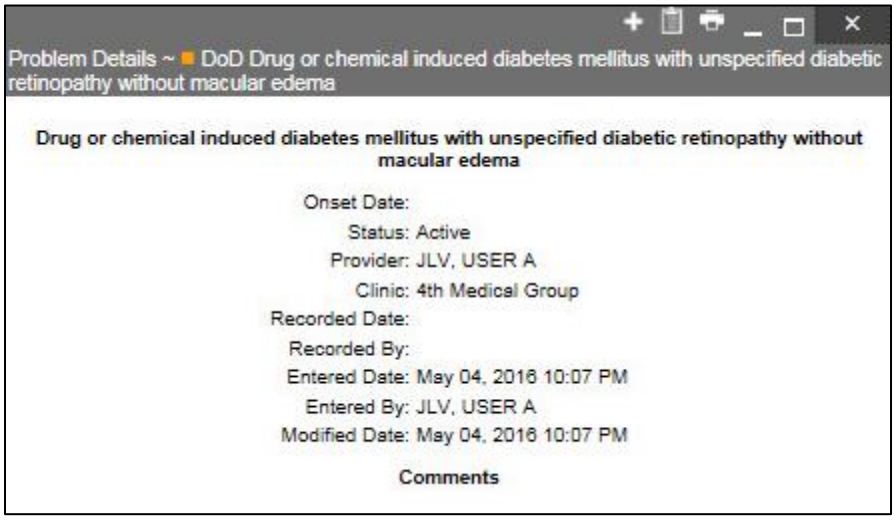
Figure 124: Problem List Widget – Expanded View



4.9.19.2 Viewing Problem List Details

Click a hyperlinked entry in the Description column in either the minimized or expanded views of the **Problem List** widget to open a separate window containing the detailed report of the record.

Figure 125: Problem List Details Window – DoD Record



4.9.19.3 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Use the **Filter by Description** drop-down box to re-draw the widget to show only the records for the selected problem(s).
- Use the **Filter by Standardized Description** drop-down box to re-draw the widget to show only the records for the selected problem(s).
- Use the **Filter by Status** drop-down box to re-draw the widget to show only the records with the selected status.

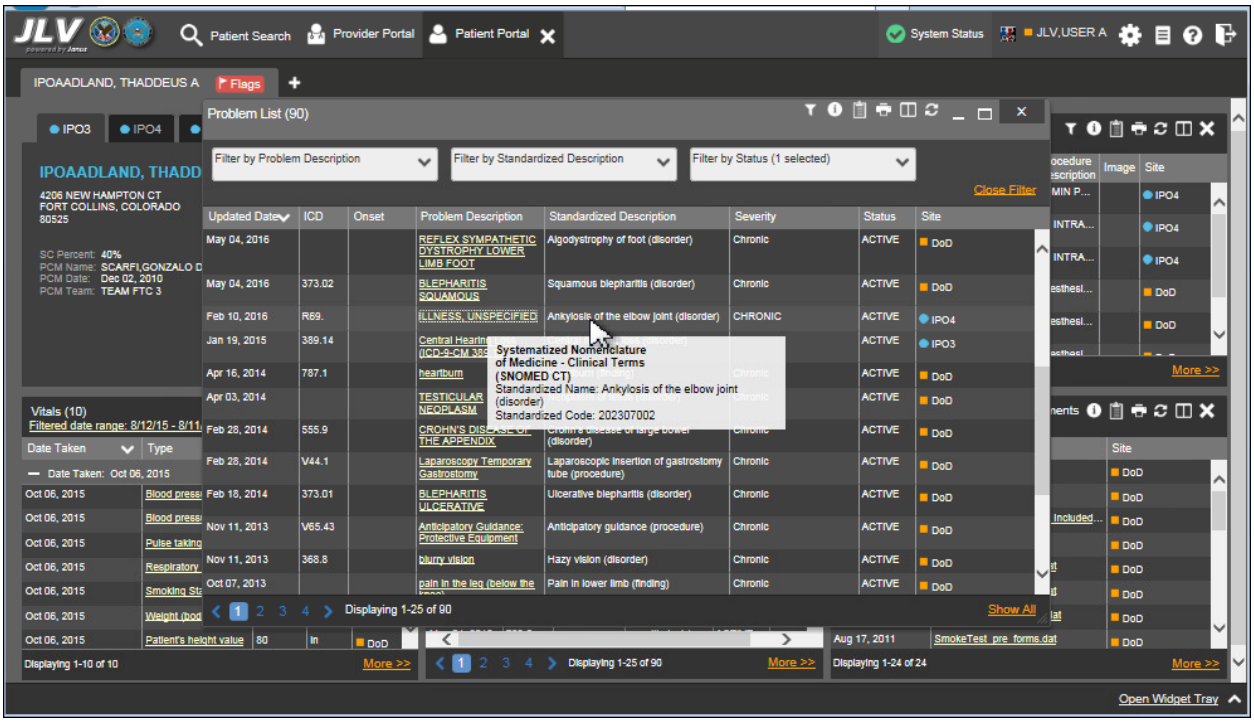
4.9.19.4 Terminology Normalization in the Problem List Widget

Terminology normalization is provided in the **Problem List** widget through the following GUI elements:

- The Description column displays a description of a problem within the patient's record. Hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (SNOMED CT), the standardized SNOMED CT name, and the standardized code for that problem.
- The Standardized Description column displays the standardized name for the corresponding entry in the Problem Description column, mapped to the SNOMED CT standard. In addition to the standardized name, hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (SNOMED CT), and the standardized code for that problem.

The following example highlights a problem record mapped to the SNOMED CT standard. The standardized name and standardized code are displayed in the hover text over the record in the Standardized Description column.

Figure 126: Problem List Widget – Terminology Normalization



4.9.20 Procedures

The **Procedures** widget displays the patient's procedures. The information is displayed in reverse chronological order by the last modified date.

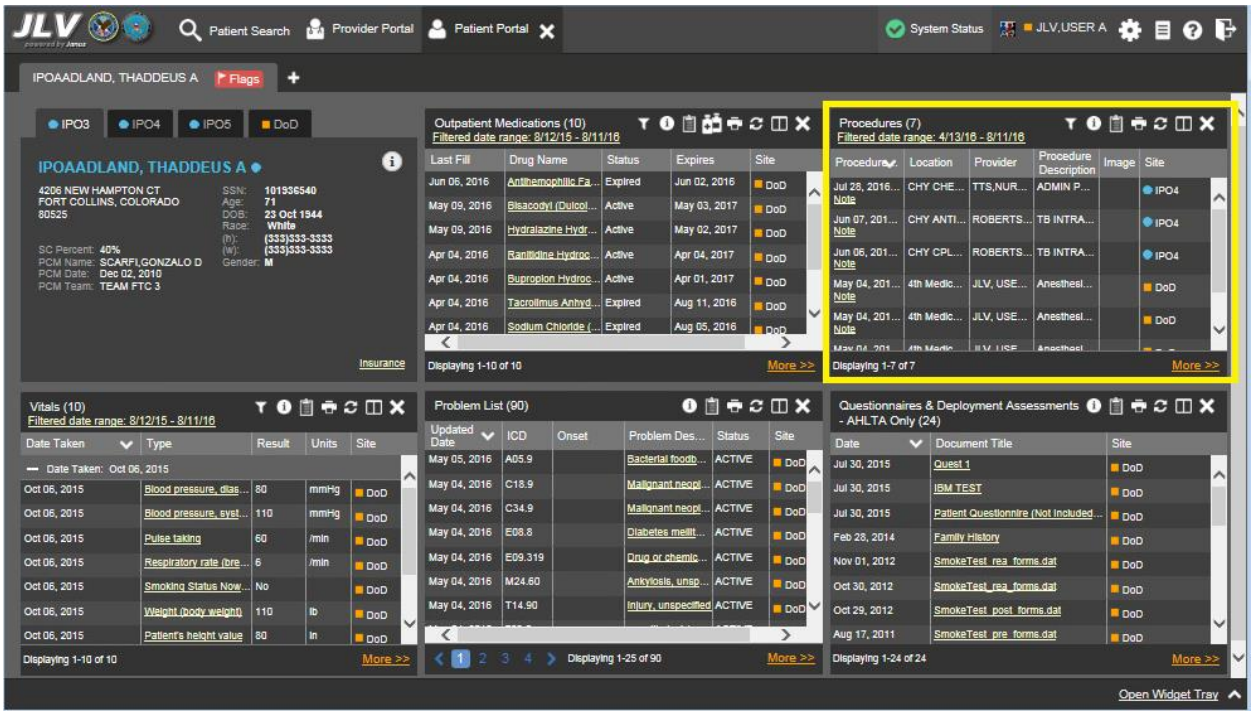
To open the widget, left-click **Procedures** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

4.9.20.1 Procedures Widget Data

In the minimized view of the **Procedures** widget, the procedures information includes:

- Procedure Date
- Location
- Provider
- Procedure Description
- Image
- Site

Figure 127: Procedures Widget – Minimized View

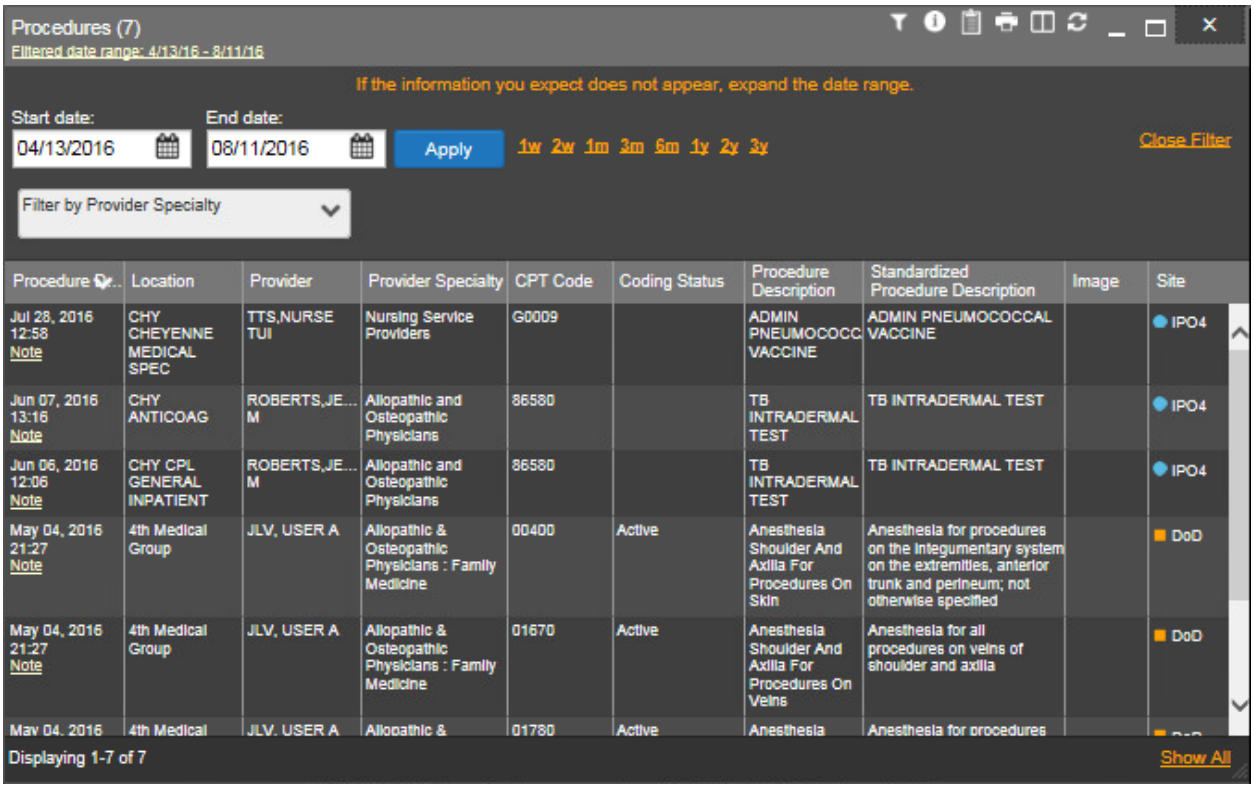


Click **More** >> from the minimized view of the **Procedures** widget to open an expanded view of the widget. In the expanded view, the procedures information includes:

- Procedure Date
- Location
- Provider
- Provider Specialty
- Current Procedural Terminology (CPT) Code
- Coding Status
- Procedure Description
- Standardized Procedure Description
- Image
- Site

A **camera** icon in the Image column indicates that one or more images are associated with that record. Clicking the **camera icon** from the column will open the VistA Imaging Viewer in a standalone window and display the associated image(s).

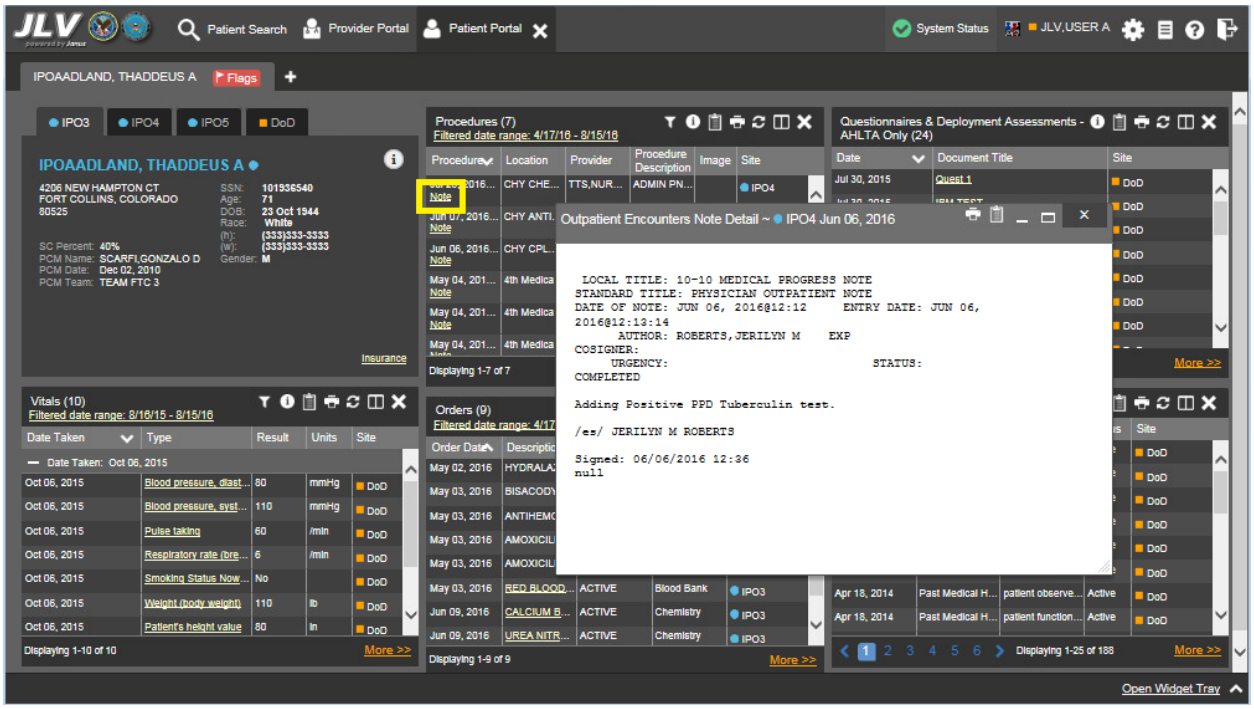
Figure 128: Procedures Widget – Expanded View



4.9.20.2 Viewing Procedure Notes

Clicking the **Note** link where available in the Procedure Date column indicates the patient record includes an encounter note associated with that procedure. For DoD records, clicking **Note** will open the note in a separate browser tab. For VA records, clicking **Note** will open the note in a standalone window.

Figure 129: Procedure Note – VA Record



4.9.20.3 Display and Filter Options

Display and filter options within the **Procedures** 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Specify the date range for which procedures data will be 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. When a date range filter is applied in an open widget, the date range is displayed in the widget header. Open or close the filter options by clicking on the date range in the header.
- Use the **Filter by Provider Specialty** drop-down box to re-draw the widget to show only the records for the selected provider type(s).
- Use the **Filter by Site** drop-down box to re-draw the widget to show only the records for the selected site.

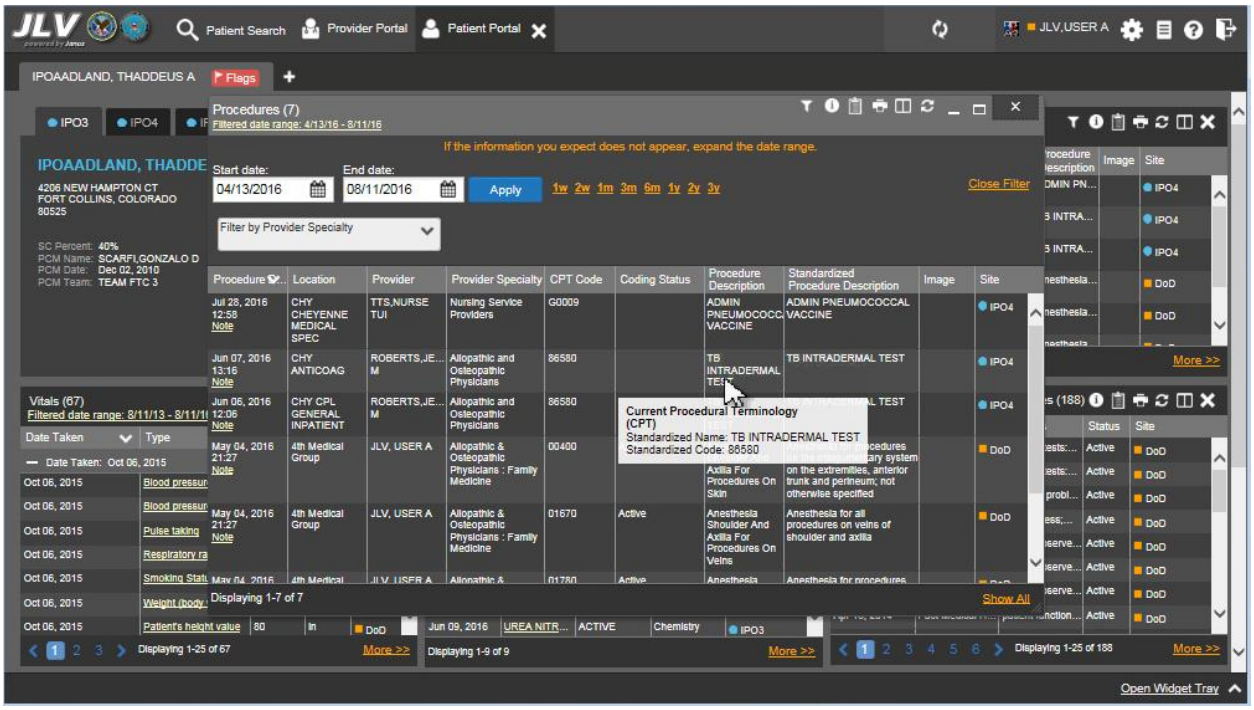
4.9.20.4 Terminology Normalization in the Procedures Widget

Terminology normalization is provided in the **Procedures** widget through the following GUI elements:

- The data in the Provider and Provider Specialty columns in the minimized and expanded views of the widget are normalized to the National Uniform Claim Committee Taxonomy (NUCC) standard. Hovering over the entries in these columns will display the standardized name and standardized code for the provider.
- The data in the Procedure Description and Standardized Procedure Description columns in the minimized and expanded views of the widget are normalized to the Current Procedural Terminology (CPT) standard. Hovering over the entries in these columns will display the standardized name and standardized code for the procedure.

The following example highlights procedure data shown mapped to the CPT standard. The standardized name and standardized code are displayed in the hover text over the record in the Procedure Description column.

Figure 130: Procedures Widget – Terminology Normalization



4.9.21 Progress Notes

The **Progress Notes** widget provides the patient's progress notes information, displayed in reverse chronological order by the note date.

To open the widget, left-click **Progress Notes** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

4.9.21.1 Progress Notes Widget Data

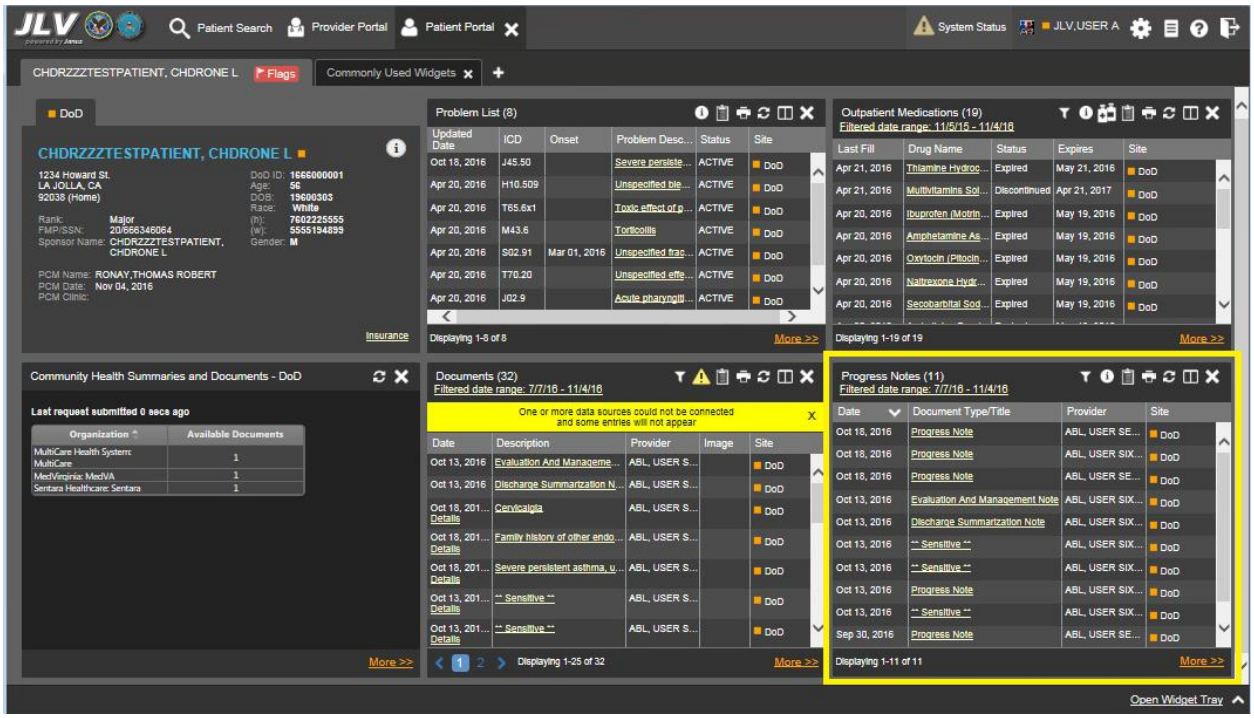
In the minimized view of the **Progress Notes** widget, the progress notes information includes:

- Date
- Document Type/Title
- Provider
- Site

Click a hyperlinked entry in the Document Type/Title column in either the minimized or expanded views of the widget to access additional information from the record. DoD records will be displayed in PDF format. Refer to Section 4.9.21.2, Viewing Progress Notes for more information.

JLV masks the display of sensitive records in the **Progress Notes** widget (i.e., labeled ****Sensitive**** in the Document Type/Title column). JLV users may access the record but will be audited each time a sensitive DoD record is viewed. Refer to Section 4.9.14.8, Viewing Sensitive Data in the Lab Results Widget.

Figure 131: Progress Notes Widget – Minimized View



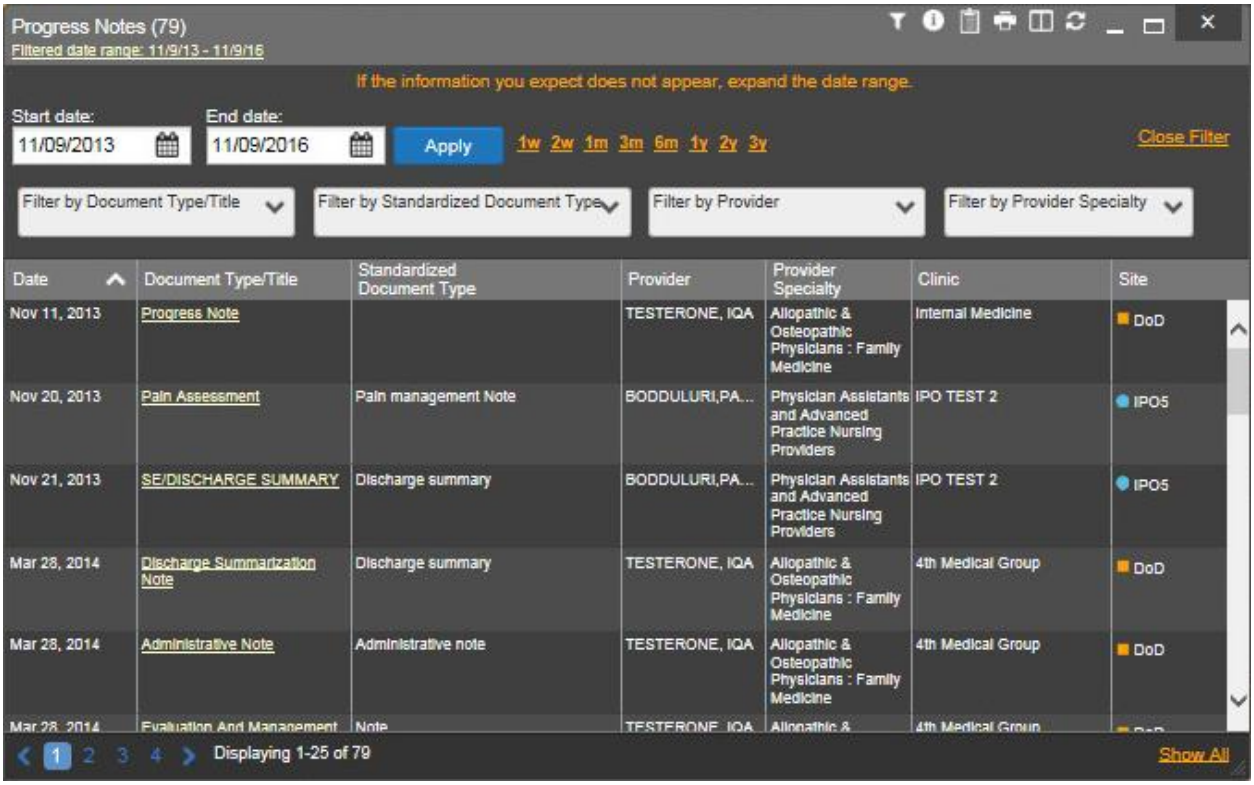
Click **More >>** from the minimized view of the **Progress Notes** widget to open an expanded view of the widget. In the expanded view, the progress notes information includes:

- Date
- Document Type/Title
- Standardized Document Type

- Provider
- Provider Specialty
- Clinic
- Site

Click a hyperlinked entry in the Document Type/Title column in either the minimized or expanded views of the widget to access additional information from the record. DoD records will be displayed in PDF format. Refer to Section 4.9.21.2, Viewing Progress Notes for more information.

Figure 132: Progress Notes Widget – Expanded View



4.9.21.2 Viewing Progress Notes

Click a hyperlinked entry in the Document Type/Title column in either the minimized or expanded views of the widget to access additional information from the record. An example of a VA progress note record is shown in Figure 133.

DoD records will be displayed in PDF format. After clicking an entry in the Document Type/Title column, a user will be prompted to open the note content in PDF format (as seen in Figure 134). Click **Open** in the Document Ready dialog box to view the document.

For more information about the **Add to Report Builder** option shown in Figure 134, refer to Section 4.5, Using the Report Builder.

Figure 133: Progress Notes – VA Record

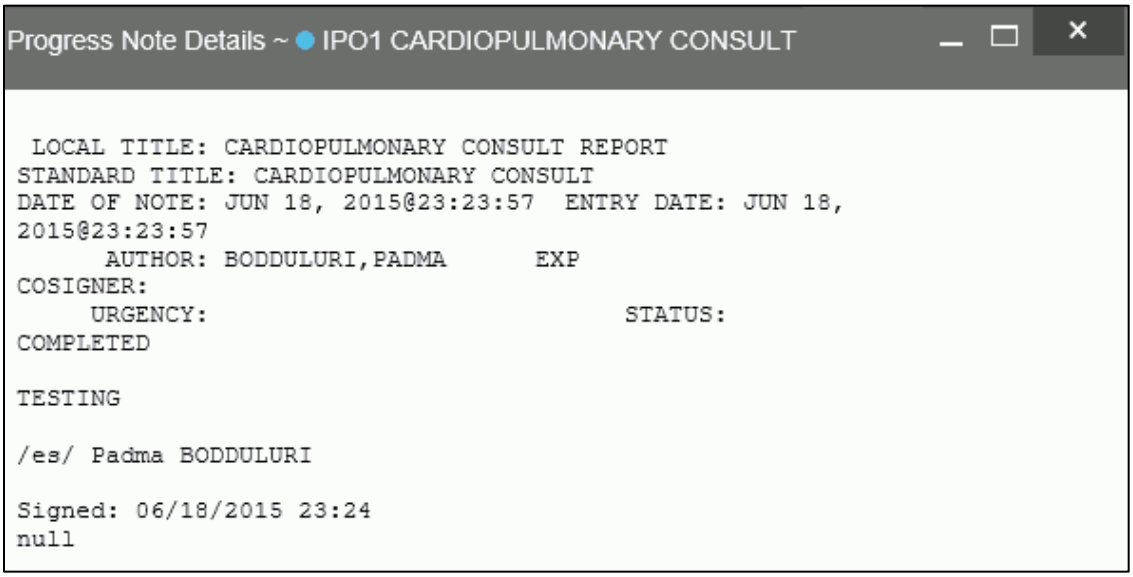
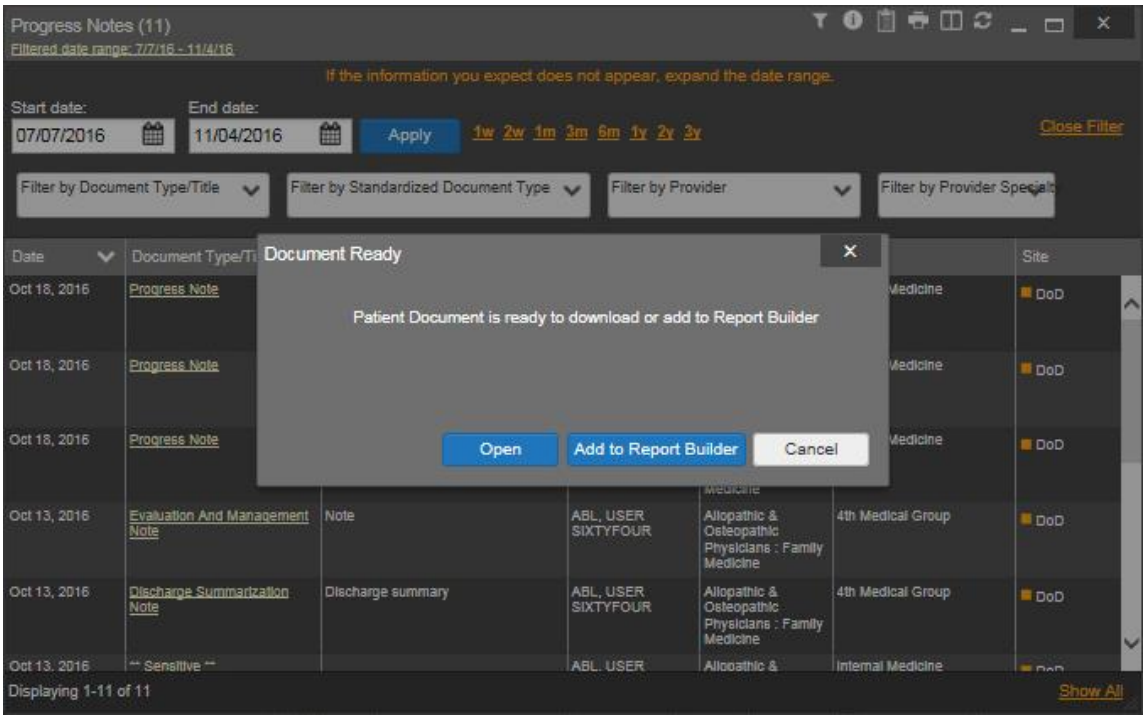


Figure 134: Progress Notes – Document Ready Prompt for DoD Record



4.9.21.3 Display and Filter Options

Display and filter options within the **Progress Notes** 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a

column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.

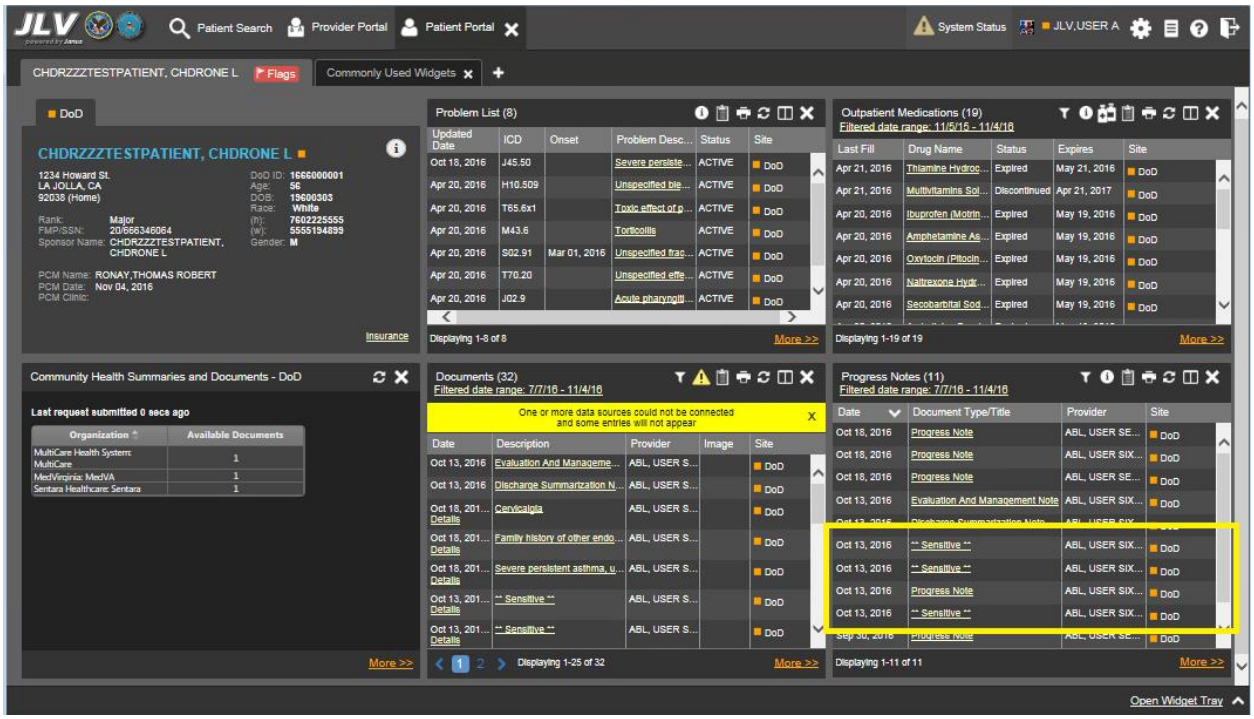
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Specify the date range for which records will be displayed in the widget using the **Quick Date Range Selector** or the **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. When a date range filter is applied in an open widget, the date range is displayed in the widget header. Open or close the filter options by clicking on the date range in the header.
- Use the **Filter by Document Type/Title** drop-down box to re-draw the widget to show only the records for the selected type.
- Use the **Filter by Standardized Document Type** drop-down box to re-draw the widget to show only the records for the selected type.
- Use the **Filter by Provider** drop-down box to re-draw the widget to show only the records for the selected provider.
- Use the **Filter by Provider Specialty** drop-down box to re-draw the widget to show only the records for the selected provider type(s).

4.9.21.4 Viewing Sensitive Data in the Progress Notes Widget

JLV masks the display of sensitive records in the **Progress Notes** widget (****Sensitive**** record example shown in Figure 135). JLV users may access the record but will be audited each time a sensitive DoD record is viewed.

After clicking the hyperlink in the Document Type/Title column for a record masked as sensitive, JLV will notify the user that he/she will be audited. This message is triggered each time a user clicks a sensitive record. After the user selects his/her purpose to view the record and agrees to be audited, sensitive data will appear in the Details view but the record type/title will remain masked in the minimized and expanded views of the widget.

Figure 135: Masked Sensitive Record in Progress Notes Widget



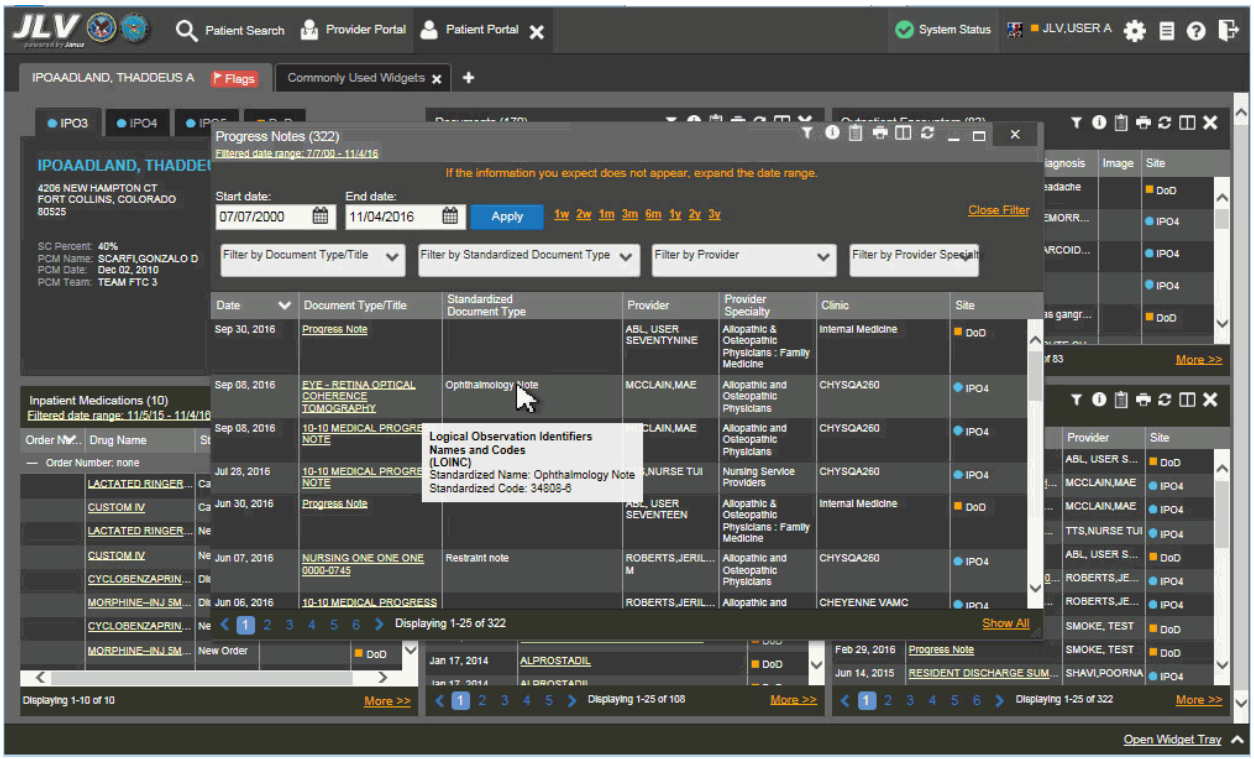
4.9.21.5 Terminology Normalization in the Progress Notes Widget

Terminology normalization is provided in the **Progress Notes** widget through the following GUI elements:

- The Document Type/Title column displays the name of a note within the patient's record. Hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (LOINC), the standardized LOINC name, and the standardized code for that note.
- The Standardized Document Type column displays the standardized name for the corresponding entry in the Document Type/Title column, mapped to the LOINC standard. In addition to the standardized name, hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (LOINC and the standardized code for that note.
- The data in the Provider and Provider Specialty columns in the minimized and expanded views of the widget are normalized to the National Uniform Claim Committee Taxonomy (NUCC) standard. Hovering over the entries in these columns will display the standardized name and standardized code for the provider.

The following example displays a progress notes document mapped to the LOINC standard. The standardized name and standardized code are displayed in the hover text over the record in the Standardized Document Type/Title column.

Figure 136: Progress Notes Widget – Terminology Normalization



4.9.22 Questionnaires and Deployment Assessments

The **Questionnaires and Deployment Assessments** widget provides the patient's history of questionnaires and pre- and post-deployment assessments from DoD sources, displayed in reverse chronological order by date. Records displayed include forms such as DoD Form 2795, DoD Form 2796, and DoD Form 2900.

To open the widget, left-click **Questionnaires and Deployment Assessments** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

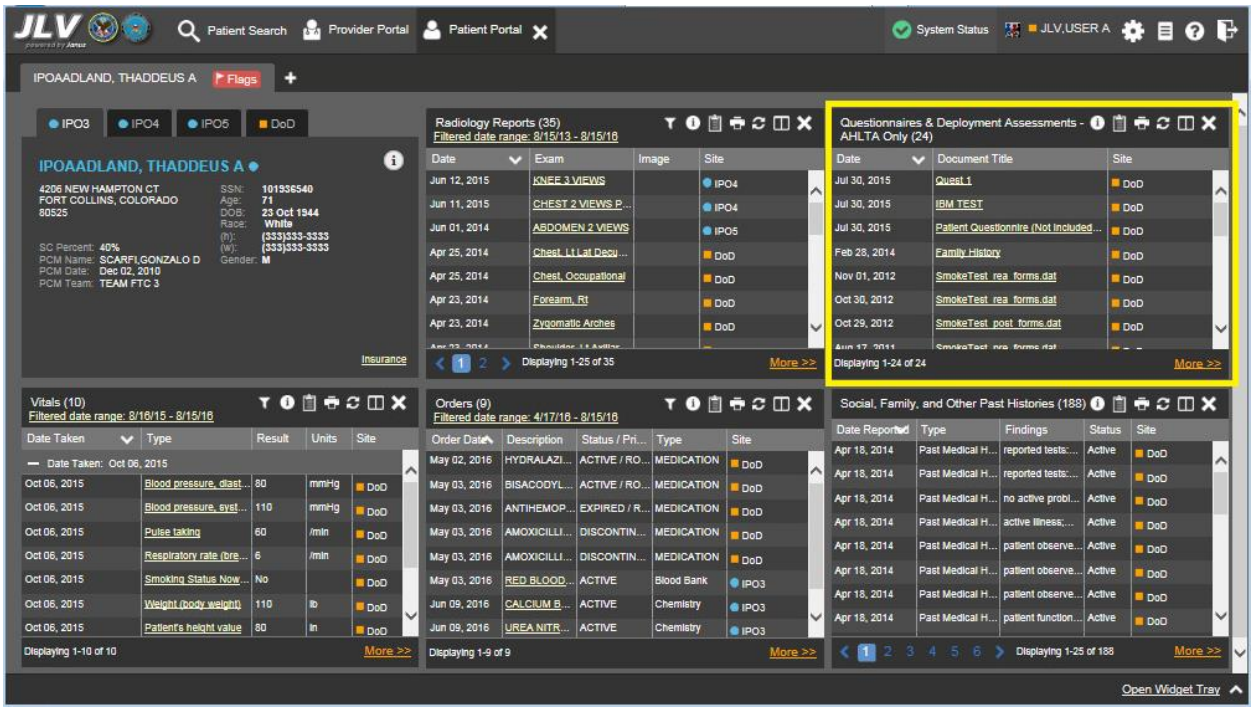
4.9.22.1 Questionnaires and Deployment Assessments Widget Data

In the minimized view of the **Questionnaires and Deployment Assessment** widget, the questionnaire and deployment assessment information includes:

- Date
- Document Title
- Site

Click a hyperlinked entry in the Document Title column in either the minimized or expanded views of the widget to open a separate window containing the full questionnaire or assessment record. Refer to Section 4.9.22.2, Viewing Questionnaire and Assessment Documents for more information.

Figure 137: Questionnaires and Deployment Assessments Widget – Minimized View

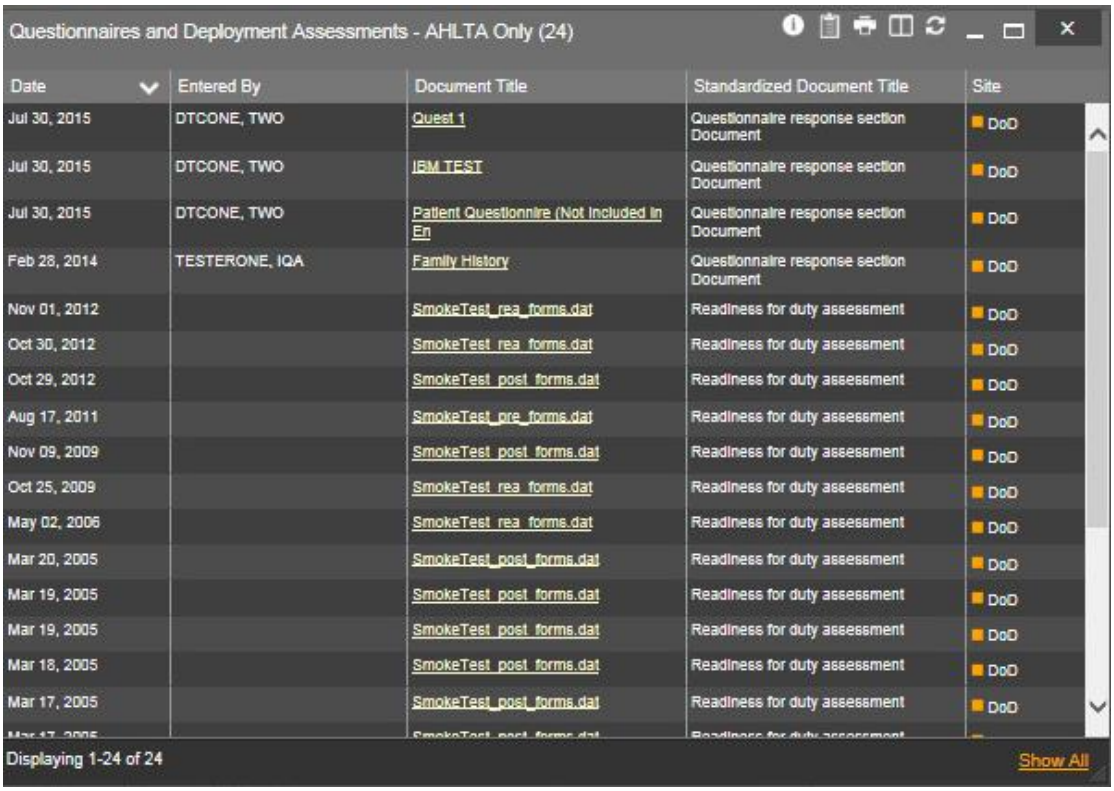


Click **More >>** from the minimized view of the **Questionnaires and Deployment Assessment** widget to open an expanded view of the widget. In the expanded view, the questionnaire and deployment assessment information includes:

- Date
- Entered by
- Document Title
- Standardized Document Title
- Site

Click a hyperlinked entry in the Document Title column in either the minimized or expanded views of the widget to open a separate window containing the full questionnaire or assessment record. Refer to Section 4.9.22.2, Viewing Questionnaire and Assessment Documents for more information.

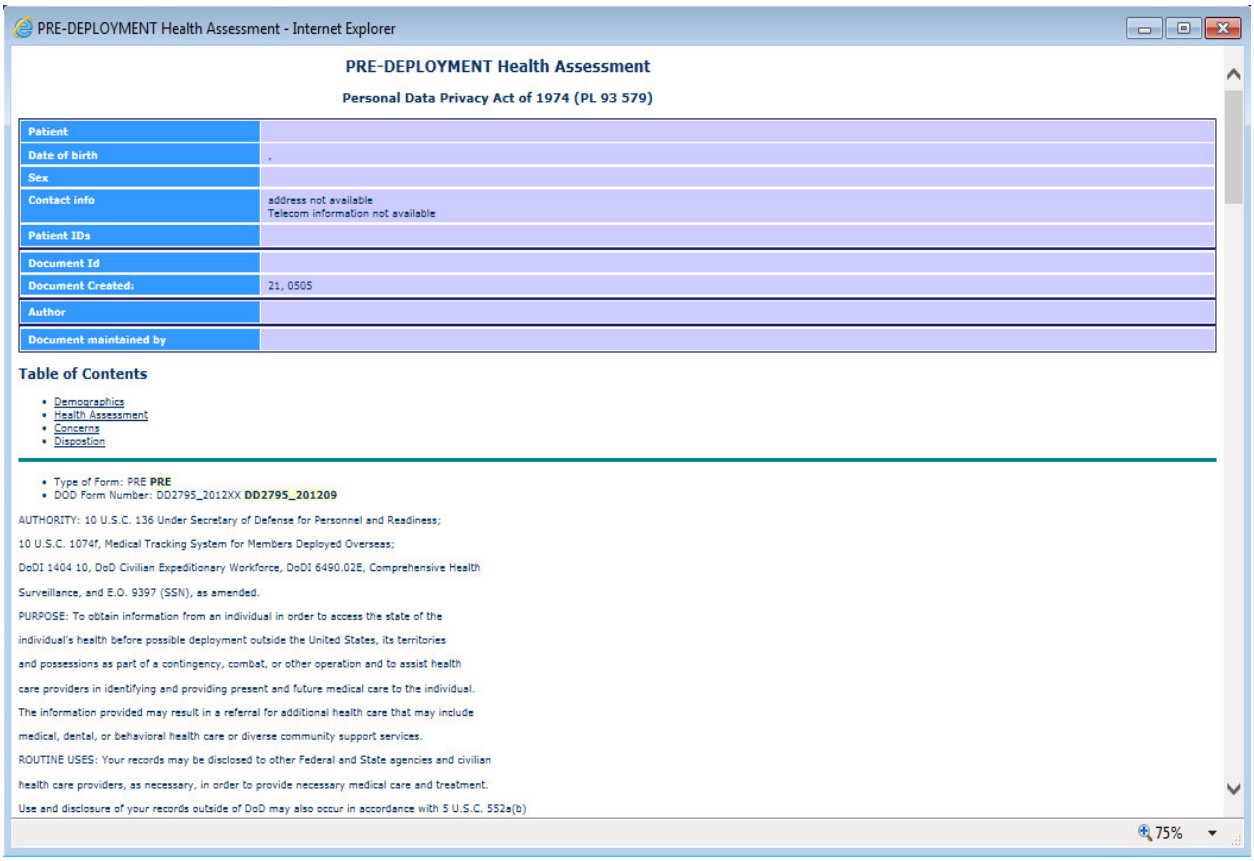
Figure 138: Questionnaires and Deployment Assessments Widget – Expanded View



4.9.22.2 Viewing Questionnaire and Assessment Documents

Click a hyperlinked entry in the Document Title column in either the minimized or expanded view of the **Questionnaires and Deployment Assessments** widget to open a separate window containing the full questionnaire or assessment record.

Figure 139: Questionnaire Document Example



4.9.22.3 Display and Filter Options

Display and filter options within the **Questionnaires and Deployment Assessments** 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.

4.9.22.4 Terminology Normalization in the Questionnaires and Deployment Assessments Widget

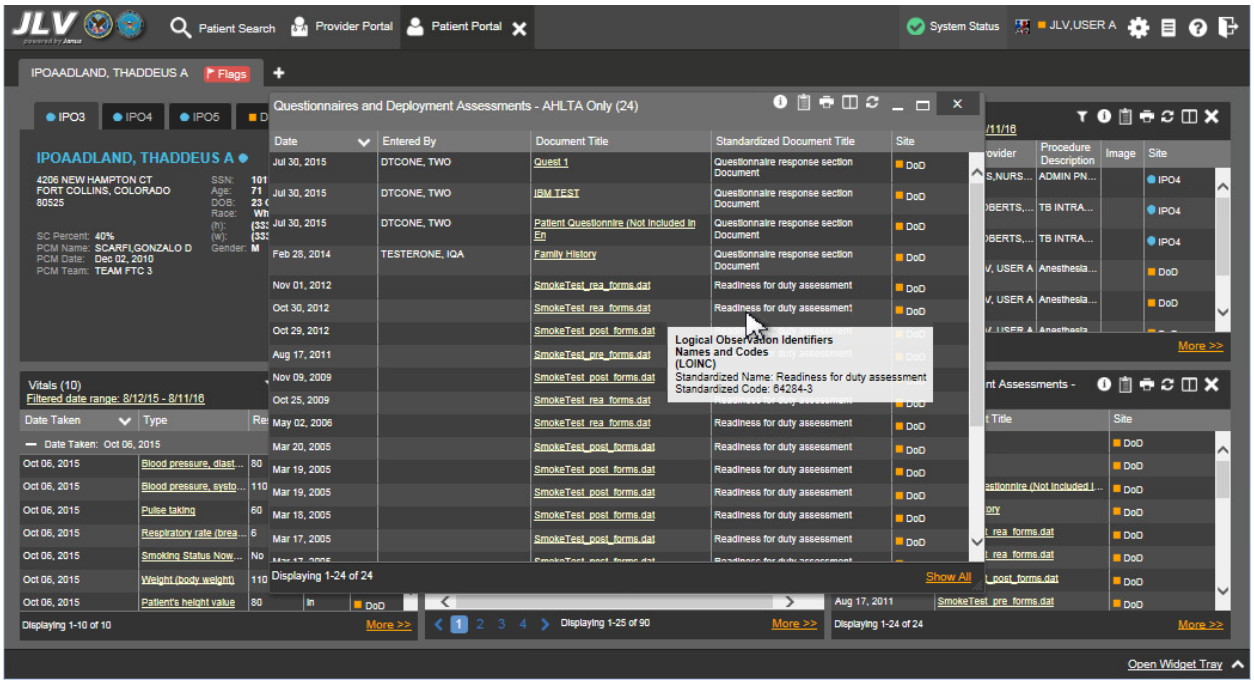
Terminology normalization is provided in the Questionnaires and Deployment Assessments widget through the following GUI elements:

- For questionnaire documents listed in the widget, the Document Title and Standardized Document columns in the minimized and expanded views are normalized to the LOINC standard. Hovering over the entries in these columns will display the standardized name and standardized code for the questionnaire.

- For pre- and post-deployment assessment documents listed in the widget, the Document Title and Standardized Document Title column in the minimized and expanded views are normalized to the LOINC standard. Hovering over the entries in these columns will display the standardized name and standardized code for the assessment.

The following example highlights a questionnaire document mapped to the LOINC standard. The standardized name and standardized code are displayed in the hover text over the record in the Standardized Document Title column.

Figure 140: Questionnaires and Deployment Assessments Widget – Terminology Normalization



4.9.23 Radiology Reports

The **Radiology Reports** widget displays the patient's radiology exams information. The information is displayed in reverse chronological order by the date/time taken.

To open the widget, left-click **Radiology Reports** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

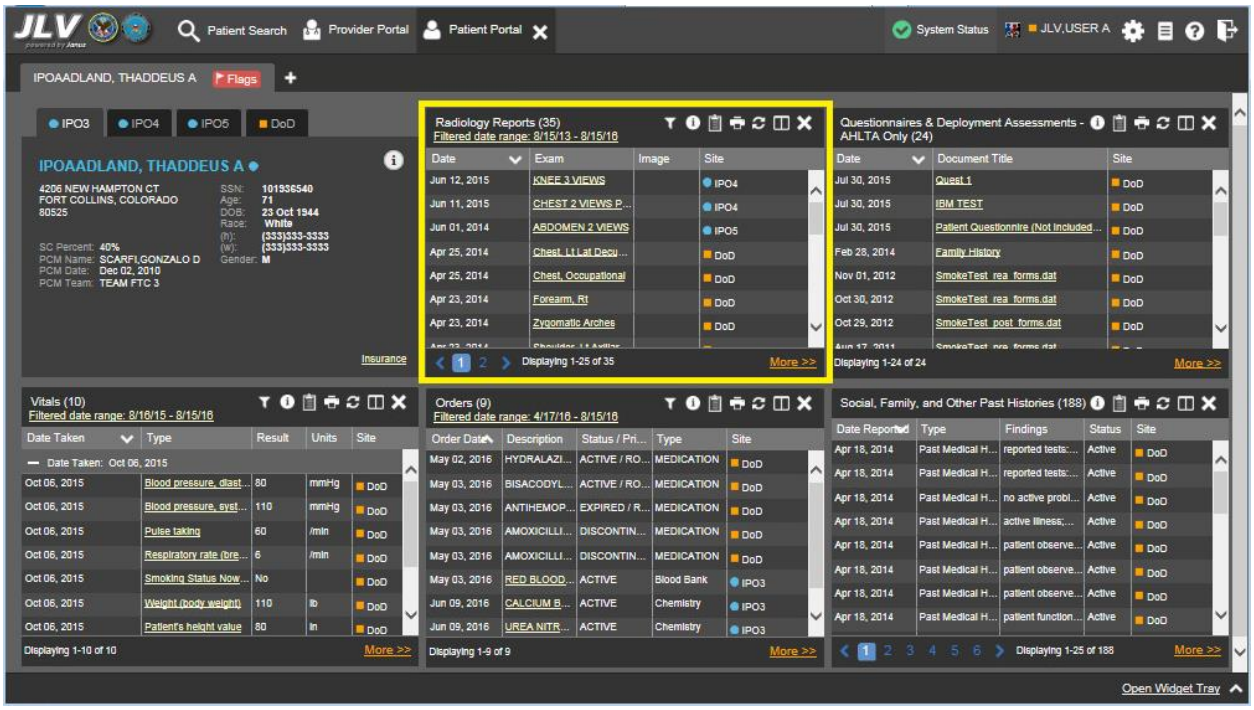
4.9.23.1 Radiology Reports Widget Data

In the minimized view of the **Radiology Reports** widget, the radiology information includes:

- Date
- Exam
- Image
- Site

Click a hyperlinked entry in the Exam column in either the minimized or expanded views of the widget to open a separate window containing the detailed report of the record. Refer to Section 4.9.23.2, Viewing Radiology Report Details for more information.

Figure 141: Radiology Reports Widget – Minimized View



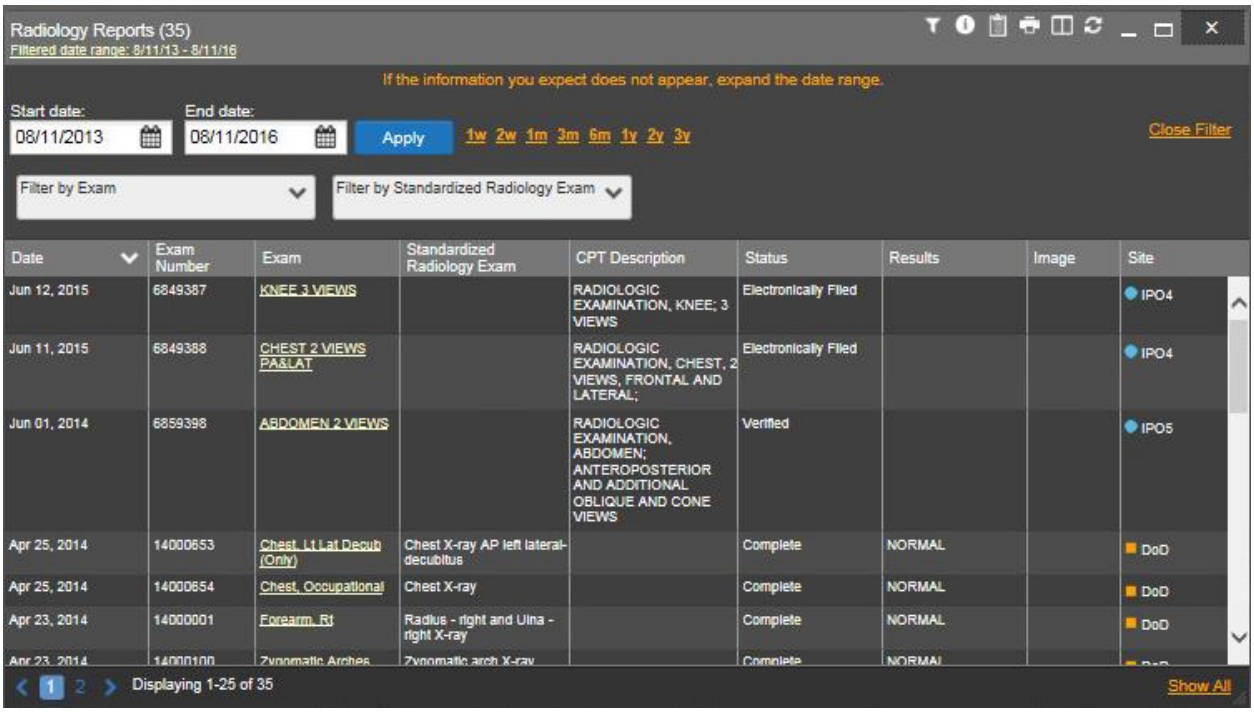
Click **More >>** from the minimized view of the **Radiology Reports** widget to open an expanded view of the widget. In the expanded view, the radiology information includes:

- Date
- Exam Number
- Exam
- Standardized Radiology Exam
- CPT Description
- Status
- Results
- Image
- Site

Click a hyperlinked entry in the Exam column in either the minimized or expanded views of the widget to open a separate window containing the detailed report of the record. Refer to Section 4.9.23.2, Viewing Radiology Report Details for more information.

A **camera** icon in the Image column indicates that one or more images are associated with that record. Clicking the **camera icon** from the column will open the VistA Imaging Viewer in a standalone window and display the associated image(s).

Figure 142: Radiology Reports Widget – Expanded View



4.9.23.2 Viewing Radiology Report Details

Click a hyperlinked entry in the Exam column in either the minimized or expanded views of the **Radiology Reports** widget to open a separate window containing the detailed report of the record. The contents of the window may vary depending on the site and what is contained in the patient record.

Figure 143: Radiology Report Details Window – DoD Record

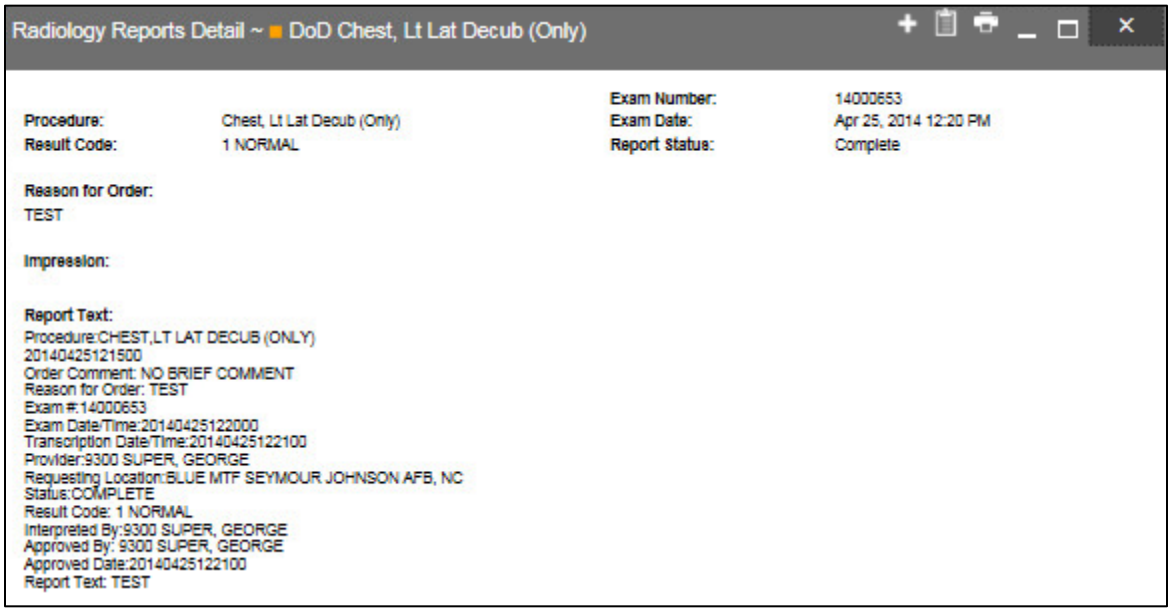
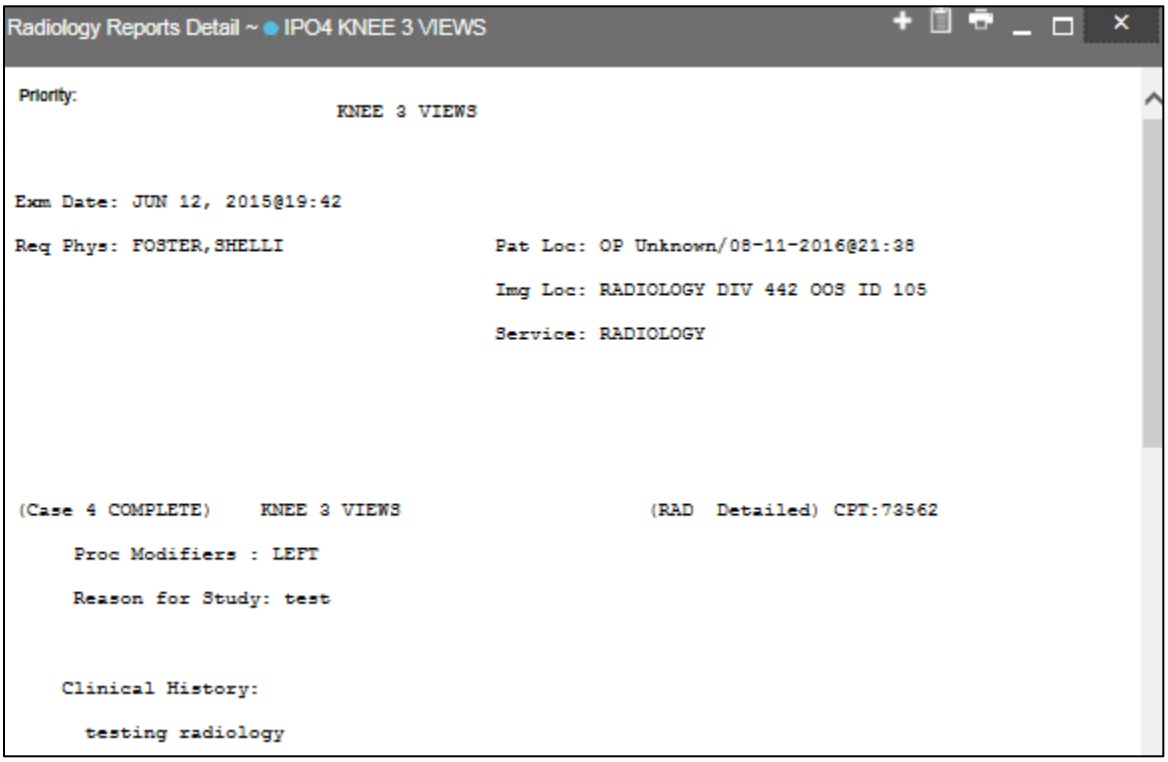


Figure 144: Radiology Report Details Window – VA Record



4.9.23.3 Display and Filter Options

Display and filter options within the **Radiology Reports** 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 minimized and expanded views of the widget, the sort will be

saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.

- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Specify the date range for which records will be 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. When a date range filter is applied in an open widget, the date range is displayed in the widget header. Open or close the filter options by clicking on the date range in the header.
- Use the **Filter by Exam** drop-down box to re-draw the widget to show only the records for the selected exam(s).
- Use the **Filter by Standardized Radiology Exam** drop-down box to re-draw the widget to show only the records for the selected standardized exam(s).

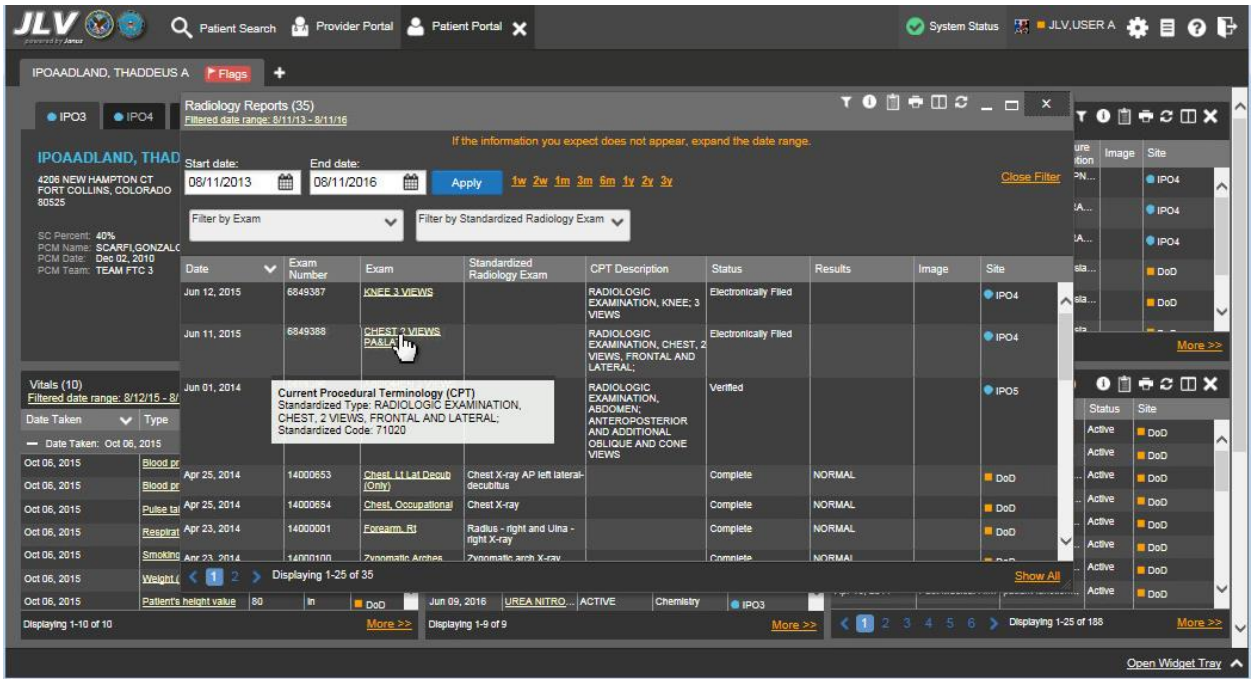
4.9.23.4 Terminology Normalization in the Radiology Reports Widget

Terminology normalization is provided in the **Radiology Reports** widget through the following GUI elements:

- The Exam column displays an exam within the patient's record. When a LOINC mapping is available, hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (LOINC), the standardized LOINC name, and the standardized LOINC code for that exam. If LOINC mappings are not available, JLV will look for Current Procedural Terminology (CPT) mappings and display CPT normalization for standardized type and standardized code, if found.
- The Standardized Radiology Exam column displays the standardized name for the corresponding entry in the Exam column, mapped to the LOINC standard. In addition to the standardized name, hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (LOINC), and the standardized code for that exam.
- The CPT Description column provides mappings for VA records. When CPT mappings are available, this column displays the standardized type for the corresponding entry in the Exam column, mapped to the CPT standard. In addition to the standardized type, hovering over an entry in this column will display the standard type used for terminology normalization for the clinical domain (CPT), and the standardized code for that exam.

The following example highlights a record (exam) mapped to the CPT standard. The standardized type and standardized code are displayed in the hover text over the record shown in the Exam column.

Figure 145: Radiology Reports Widget – Terminology Normalization



4.9.24 Social, Family, and Other Past Histories

The **Social, Family, and Other Past Histories** widget displays the patient's history records from DoD data sources. The information is displayed in reverse chronological order by the date reported.

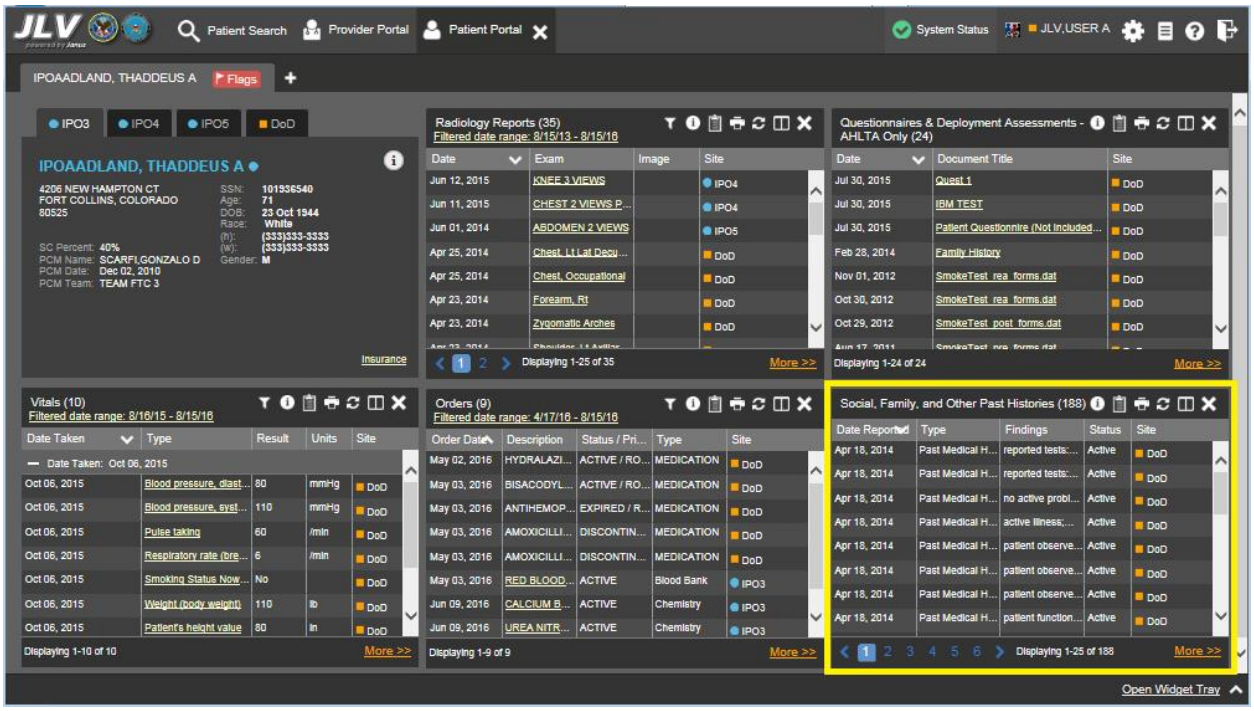
To open the widget, left-click **Social, Family, and Other Past Histories** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

4.9.24.1 Social, Family, and Other Past Histories Widget Data

In the minimized view of the **Social, Family, and Other Past Histories** widget, the histories information includes:

- Date Reported
- Type
- Findings
- Status
- Site

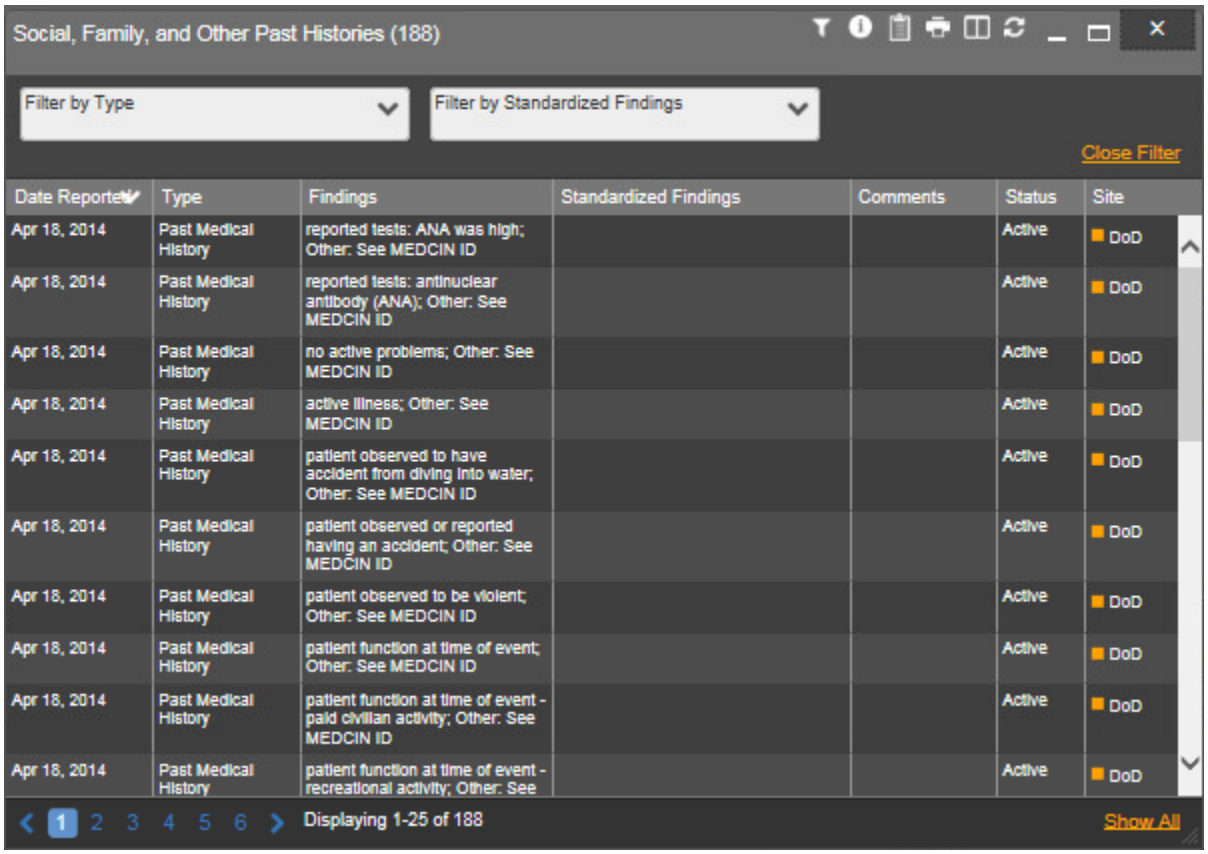
Figure 146: Histories Widget – Minimized View



Click **More >>** from the minimized view of the **Social, Family, and Other Past Histories** widget to open an expanded view of the widget. In the expanded view, the histories information includes:

- Date Reported
- Type
- Findings
- Standardized Findings
- Comments
- Status
- Site

Figure 147: Histories Widget – Expanded View



4.9.24.2 Display and Filter Options

Display and filter options within the **Social, Family, and Other Past Histories** 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Use the **Filter by Type** drop-down box to re-draw the widget to show only the records for the selected history type(s).
- Use the **Filter by Standardized Finding** drop-down box to re-draw the widget to show only the records for the selected standardized finding(s).

4.9.25 Vitals

The **Vitals** widget displays the patient's vital information. The information is grouped and displayed in reverse chronological order by the date taken.

To open the widget, left-click **Vitals** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal. Click the (+) and (-) icons next to the Data Taken row header to expand or minimize the group of vitals.

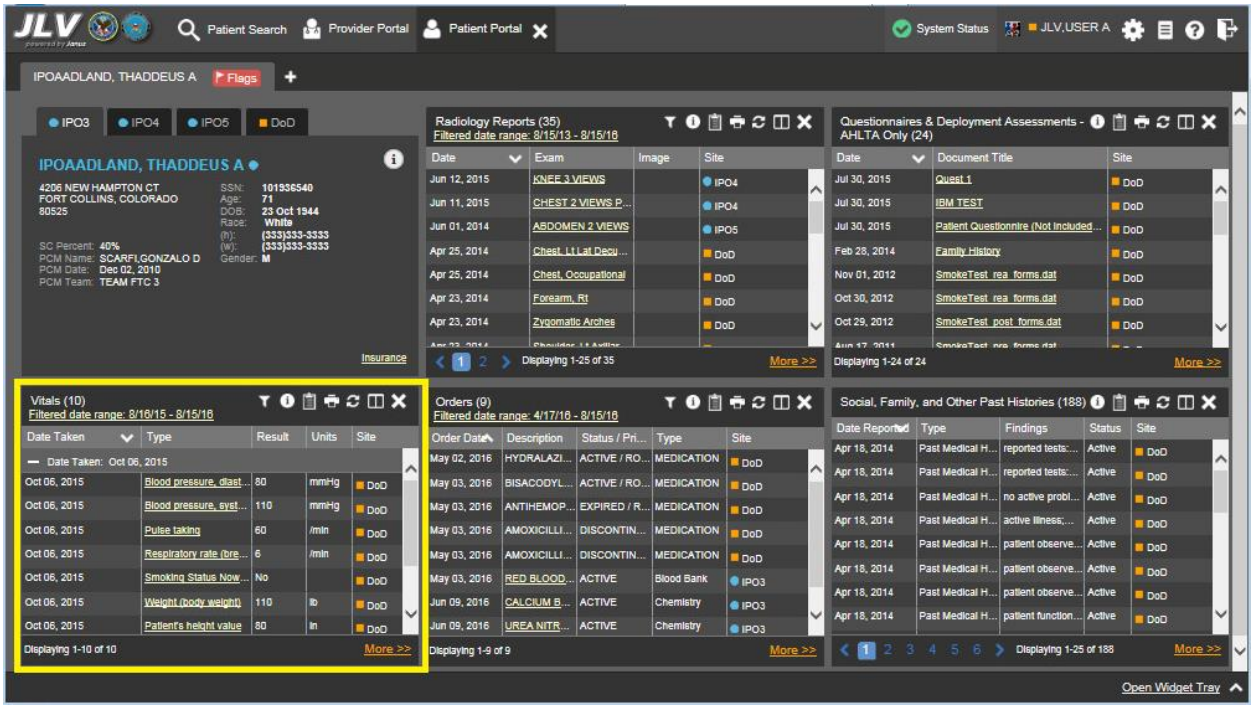
NOTE: The JLV application does not retrieve real-time data from bedside real-time equipment managed by Essentris.

4.9.25.1 Vitals Widget Data

In the minimized view of the **Vitals** widget, the information is grouped by Date Taken. Vitals information includes:

- Date Taken
- Type
- Result
- Units
- Site

Figure 148: Vitals Widget – Minimized View

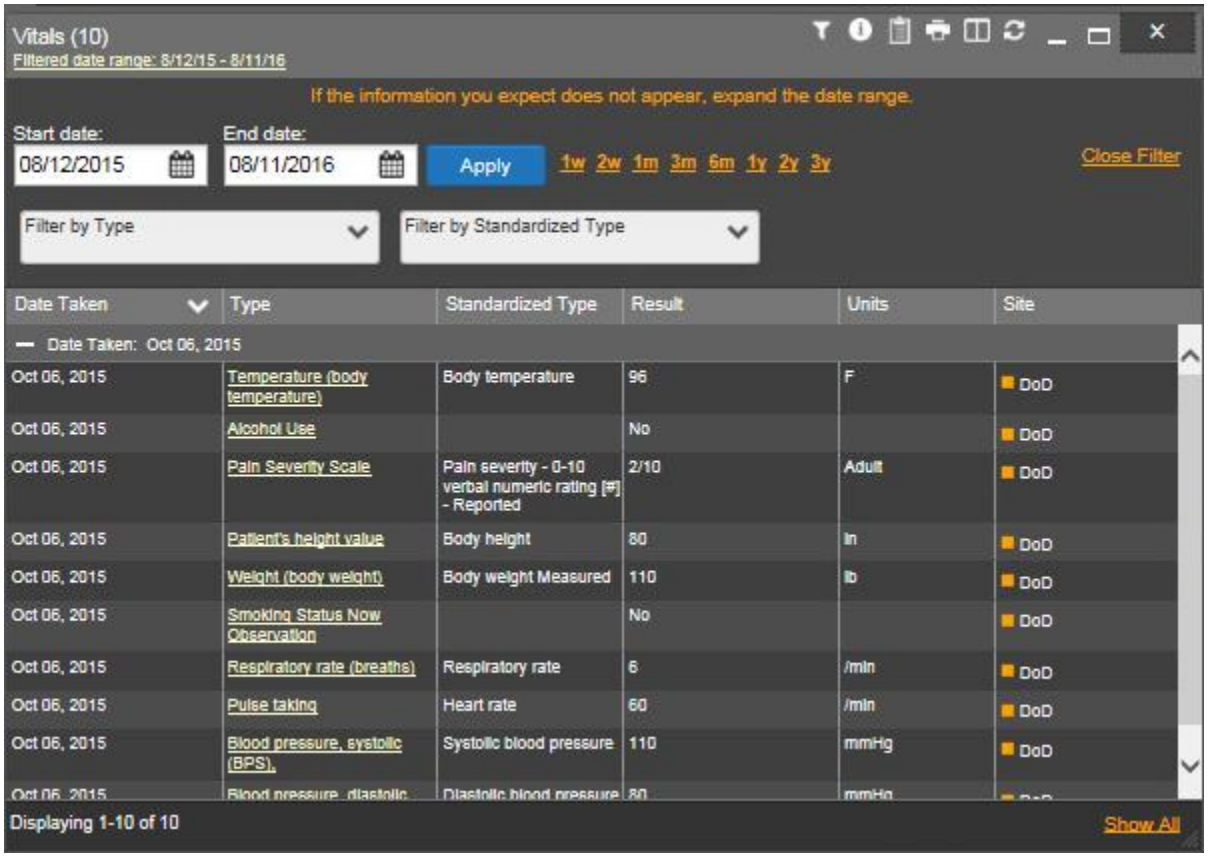


Click **More >>** from the minimized view of the **Vitals** widget to open an expanded view of the widget. Click the plus + and minus - icons next to the Data Taken row header to expand or minimize the group of vitals. In the expanded view, the Vitals information includes:

- Date Taken
- Type

- Standardized Type
- Result
- Units
- Site

Figure 149: Vitals Widget – Expanded View



4.9.25.2 Display and Filter Options

Display and filter options within the **Vitals** 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 minimized and expanded views of the widget, the sort will be saved in the user profile and will persist to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session will restore the default widget sort or the last sort saved to the user profile.
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Specify the date range for which records will be 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. When a date range filter is applied in an open widget,

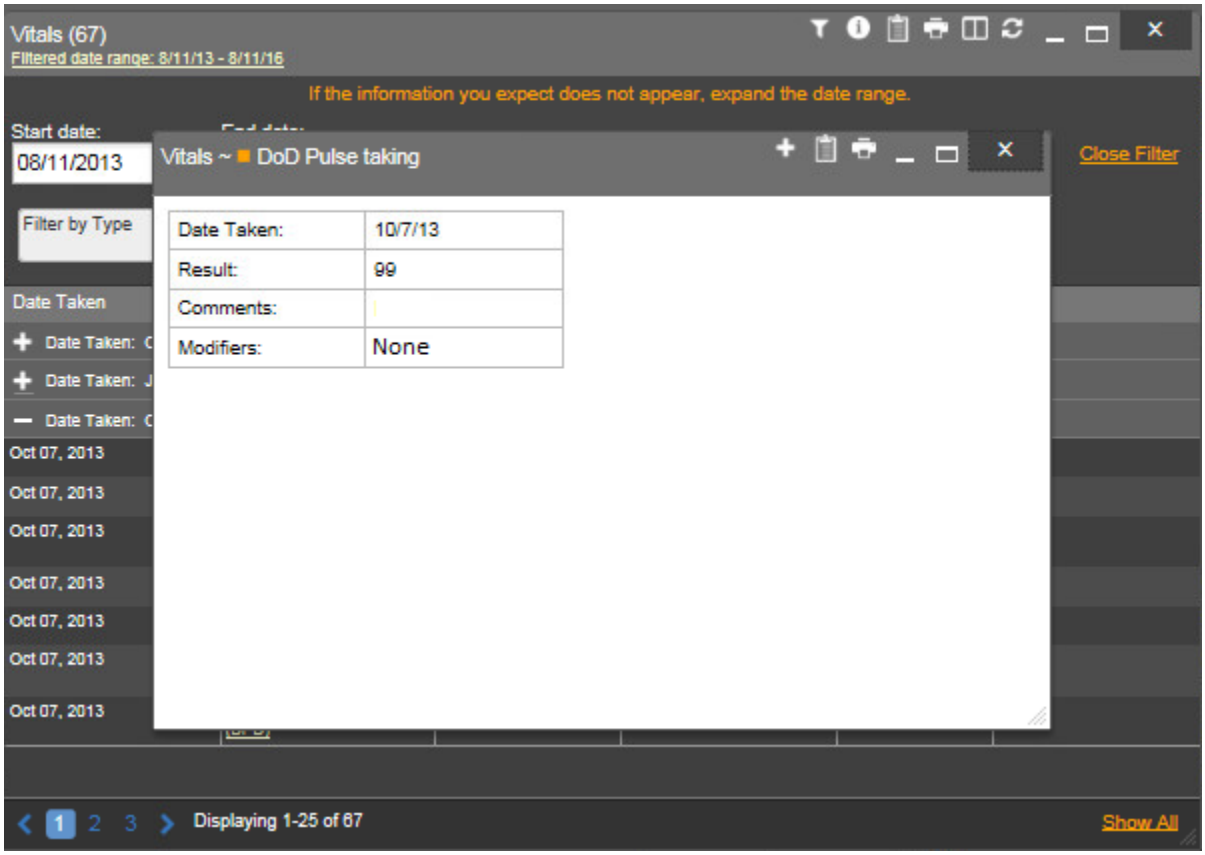
the date range is displayed in the widget header. Open or close the filter options by clicking on the date range in the header.

- Use the **Filter by Type** drop-down box to re-draw the widget to show only the records for the selected vitals type(s).
- Use the **Filter by Standardized Type** drop-down box to re-draw the widget to show only the records for the selected vitals type(s).
- Use **Graph View** to display multiple records of the same type in a graph. Refer to Section 4.9.25.4, Graph View in the Vitals Widget for more information.
- Use **Table View** to display multiple records of the same type in a tabular format. Refer to Section 4.9.25.5, Table View in the Vitals Widget for more information.

4.9.25.3 Viewing Vital Details

Clicking a hyperlinked entry for a DoD record in the Type column in either the minimized or expanded views of the **Vitals** widget opens a separate window containing the detailed report of the record. Details view for vitals is available for DoD records only.

Figure 150: Vitals Widget – Details View



4.9.25.4 Graph View in the Vitals Widget

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

To view vitals in Graph View:

1. Left-click **Vitals** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.
2. Click **More >>** from the minimized view of the **Vitals** widget to open an expanded view of the widget.
3. In the expanded view, select an available filter from the **Filter by** drop down boxes. This action enables the **Show Graph** and **Show Table** links.
4. Click **Show Graph**.

A separate window opens, displaying a graph of the records of the type selected in the filter.

4.9.25.5 Table View in the Vitals Widget

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

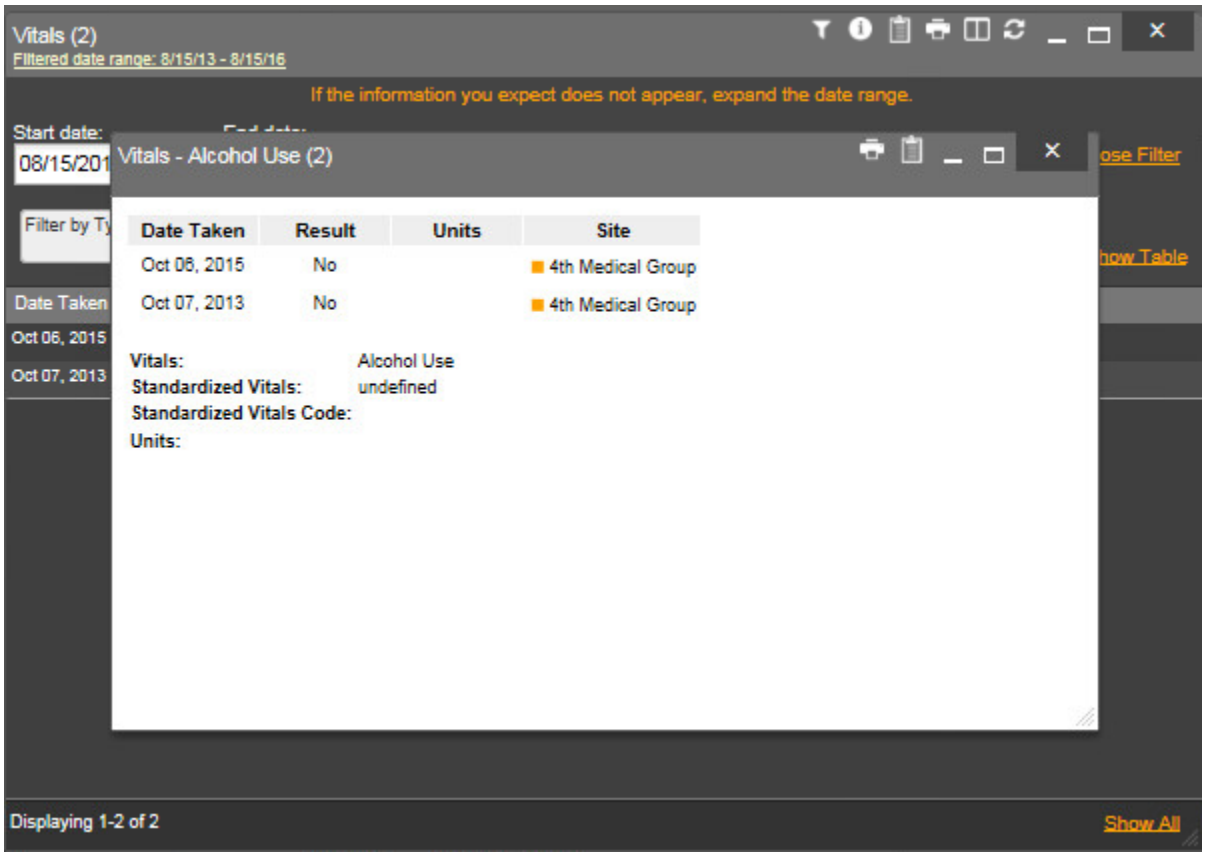
To view vitals in Table View:

1. Left-click **Vitals** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.
2. Click **More >>** from the minimized view of the **Vitals** widget to open an expanded view of the widget.
3. In the expanded view, select an available filter from the **Filter by** drop down boxes. This action enables the **Show Graph** and **Show Table** links.
4. Click Show Table.

A separate window opens, displaying a table containing multiple records of the type selected in the filter.

The following screenshot displays the table view from the **Vitals** widget.

Figure 151: Vitals Widget – Data Displayed in Table View



4.9.25.6 Terminology Normalization in the Vitals Widget

Terminology normalization is provided in the **Vitals** widget through the following GUI elements:

- The Type column displays a vital type within the patient's record. Hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (LOINC), the standardized LOINC name, and the standardized LOINC code for that vital.
- The Standardized Type column displays the standardized name for the corresponding entry in the Type column, mapped to the LOINC standard. In addition to the standardized name, hovering over an entry in this column will display the standard used for terminology normalization for the clinical domain (LOINC), and the standardized code for that vital.

5 Troubleshooting

5.1 Special Instructions for Error Correction

5.1.1 Additional Tips for Logging In

JLV utilizes access control and authentication services to limit access to registered, authorized users. When enabled, JLV will validate a user against information retrieved from that user's smart card.

Embedded Help is available for the login fields with detailed error messages if validation does not occur. If you are experiencing other trouble logging in to JLV, please review the following before contacting the Help Desk:

- VHA users should enter existing CPRS codes in JLV Login page fields.
- VBA users should enter existing CAPRI codes in JLV Login page fields.
- All VA users must select a Site from the Site drop-down list on the JLV Login page. Most users will need to specify the individual facility name. VBA users should select *Veterans Benefits Administration* from the Site drop-down list.

5.1.2 Cannot View Patients Error Correction

When access to patients is restricted for a VHA VA user, once the user logs in JLV will immediately display a list of restricted patients in the Patient List window. VHA users will only be able to select a patient from the list of pre-populated patients in the Patient List window. The pre-populated list represents the only patients the VHA user is authorized to view. JLV will also disable and remove patient search from the portal and insert a Patient List link.

5.1.3 Login Page Error Messages

Additional troubleshooting is provided in the following table.

Table 13: Login Page Error Message Troubleshooting

Error Message	Resolution Steps
Access denied. You are not an authorized user.	*WHAT?* Error message indicating *Access Denied. You are not an authorized User*. *WHY?* PIV card processing problem or invalid security certificate chosen. *FIX IT:* 1. Close browser window. 2. Re-insert PIV card and re-launch JLV link. 3. Select a certificate that is not expired and specifies *Issued by: Veterans Affairs CA B1*. If this is unsuccessful, fully reboot your system. This refreshes all connections and resolves greater than 95% of any remaining problems.

Error Message	Resolution Steps
Could not save User Profile	*WHAT?* Error message indicating *Could not save User Profile*. *WHY?* Error occurred during PIV authentication for VA users - typically a PIV card processing problem or an invalid security certificate chosen. *FIX IT:* 1. Close your browser window. 2. Re-insert PIV card and re-launch the JLV link. 3. Select a certificate that is not expired and specifies *Issued by: Veterans Affairs CA B1*. If this is unsuccessful, fully reboot your system. This refreshes all connections and resolves greater than 95% of any remaining problems.
Not a valid ACCESS/VERIFY CODE pair	WHAT? Error message *Not a valid ACCESS CODE/VERIFY CODE pair* is displayed on the login screen. WHY? 1) JLV could not match your access and verify codes to the Site selected in the drop down or VA, or 2) Username and password were entered instead of access/verify codes. *FIX IT:* 1. VBA users MUST select *Veterans Benefits Administration* from the Site from the drop-down. 2. VHA users must select the parent VistA host site for their facility (e.g., Wichita uses *Kansas City, Missouri [MO]*). 3. Re-enter correct Access and Verify codes (CAPRI codes for VBA users, CPRS codes for VHA users).
Page cannot be displayed	WHAT? You receive a *Page cannot be displayed* error when launching JLV. WHY? The JLV Uniform Resource Locator (URL) requires certain internet explorer settings FIX IT: 1. With Internet Explorer open, click the Tools menu or press ALT-X. 2. Select Internet Options. 3. When the dialog opens, select the Advanced tab. 4. Scroll down in the list until you see the settings below and assure Secure Socket Layer (SSL) 2.0 is NOT checked and that Transport Layer Security (TLS) 1.0, 1.1 and 1.2 are checked. 5. Click OK, then re-launch JLV and the page should load.
SmartCard required	WHAT? Error message *Smart Card Required*. WHY? Smart card not read by Windows Security and JLV before launching JLV link. FIX IT: 1. Close all browser sessions/browser-based applications. 2. Re-insert PIV card and re-launch JLV link. 3. If this is unsuccessful, fully reboot your system to refreshes all connections. This resolves greater than 95% of any remaining problems.

Error Message	Resolution Steps
VERIFY CODE must be changed before continued use	WHAT? Receive *VERIFY CODE must be changed before continued use* error at login screen. WHY? CPRS or CAPRI VERIFY CODE has expired. FIX IT: 1. Open CPRS or CAPRI. 2. Select the Change Verify Code checkbox on the sign-on dialog before clicking OK. 3. You will be prompted to create a new Verify Code. 4. Once your Verify Code is changed for CPRS or CAPRI, JLV will recognize the new code immediately.

5.1.4 Patient Search System Messages

The following table summarizes messages that may be presented to JLV users during the search process.

Table 14: Patient Search System Messages

Message	Description
MVI Message: There are no patients found using the current parameters.	No patient records were found using the information entered in the Patient Search dialog box. Re-enter patient identifiers in the Patient Search dialog box fields.
MVI Error: Your query yields too many results. Please modify your search parameters to narrow the search.	JLV adheres to VA guidelines and blocks the search results when the search request yields more than 10 patients. Modify the information entered into the Patient Search dialog box to reduce the number of patients matching the entered identifiers.
MVI Error: Application Reject. There was an error attempting to process your query. Please modify your search parameters and try again.	There may be one or more errors in the information entered into the Patient Search dialog fields. Please validate your patient identifiers and try the search again. If problems persist, there may be an error in the query from MVI to DEERS (external process to JLV) or an error occurred between MVI and DEERS.
You do not have authorization to view this record. Security regulations prohibit computer access to your own medical record.	Following VA security regulations, JLV does not allow access to a user's own medical records.
You do not have authorization to view this record. Your SSN is missing from the NEW PERSON file. Contact your ACP Coordinator.	Following VA policy, JLV does not allow access to patient records if the JLV user's SSN is not in the user's VistA profile.

5.1.5 VA VLER Server Error Messages

The following table summarizes an error that may be presented to JLV users related to the display of VA VLER data.

Table 15: Community Health Summaries and Documents Widget Error

Message	Description
Error displayed in widget: *Something went wrong: Internal Server Error (500)*	This message will appear in the **Community Health Summaries and Documents – VA** widget when the VA VLER service is not available. If this message persists after 5 minutes, the user should contact the NSD to report the connection error.

6 Acronyms and Abbreviations

The following is a list of the acronyms and abbreviations used throughout this guide. The list does not include the acronyms that may be used within EHRs, or by providers.

Table 16: Acronyms and Abbreviations

Acronym	Description
Adm	Admission
AHLTA	Armed Forces Health Longitudinal Technology Application
AITC	Austin Information Technology Center
AP	Anatomic Pathology
AU	Autopsy
BB	Blood Bank
CAPRI	Compensation and Pension Record Interchange
CCD	Continuity of Care Document
CCDA	Consolidated Clinical Document Architecture
CCOW	Clinical Context Object Workgroup
CCDA	Consolidated Clinical Document Architecture
CDC	Centers for Disease Control
CDR	Clinical Data Repository
CHCS	Composite Health Care System
CLIN	Contract Line Item Number
CPRS	Computerized Patient Record System
CPT	Current Procedural Terminology
CT	Clinical Terms
CVX	Code for Vaccines Administered
CY	Cytology
DES	Data Exchange Services
DMIX	Defense Medical Information Exchange
DOB	Date of Birth
DoD	Department of Defense
EDIPI	Electronic Data Interchange Personal Identifier
EHR	Electronic Health Records
EM	Electron Microscopy
EMR	Electronic Medical Record
EST	Eastern Standard Time
FMP	Family Member Prefix

Acronym	Description
GB	Gigabyte
GUI	Graphical User Interface
HAIMS	Healthcare Artifact and Image Management Solution
HCP	Health Care Provider
HIE	Health Information Exchange
HIV	Human Immunodeficiency Virus
ICD	International Classification of Diseases
ID	User Identification
IEN	Employer Identification Number
IP	Internet Protocol
IT	Information Technology
JLV	Joint Legacy Viewer
LOINC	Logical Observation Identifiers Names and Codes
MHS	Military Health System
MI	Military Intelligence
MVI	Master Veteran Index
NUCC	National Uniform Claim Committee
OI&T	Office of Information and Technology
PDF	Portable Document Format
PDWS	Patient Discovery Web Service
PIN	Personal Identification Number
PITC	Philadelphia Information Technology Center
PIV	Personal Identification Verification
SDD	System Design Document
SNOMED	Systematized Nomenclature of Medicine
SSL	Secure Socket Layer
SSN	Social Security Number
TLS	Transport Layer Security
TMDS	Theater Medical Data Store
UI	User Interface
URL	Uniform Resource Locator
VA	Department of Veterans Affairs
VBA	Veterans Benefits Administration
VHA	Veterans Health Administration

Acronym	Description
VistA	Veterans Health Information Systems and Technology Architecture
VLER	Virtual Lifetime Electronic Record
VSA	VistA Services Assembler