Community Viewer (CV) Version 2.9

User Guide for VA Staff

February 2019

Version 1.1

Department of Veterans Affairs (VA)

Office of Information and Technology (OIT)

Revision History

Date	Version	Description	Author
01/07/2019	1.1	Delivered for PM/COR and Business PM approval	AbleVets
01/03/2019	1.0	Delivered for abbreviated review	AbleVets
09/17/2018	0.1	Initial draft created from last approved	AbleVets

Table of Contents

1. Introduction 1
1.1. Purpose of the Guide 2
1.1.1. Guide Conventions 2
1.1.2. Terminology 2
1.2. Assumptions 3
1.3. System Requirements 3
1.4. Getting Help 3
2. Logging in to CV 4
2.1. System Notifications 5
2.1.1. Viewing Announcements 5
2.2. Editing Your User Profile at Login 6
2.3. The CV Portal Pages 6
2.3.1. Default View 6
2.3.2. Viewing System Status 7
2.3.3. Profile Settings 8
2.3.4. Using the Accessible Theme's Functionality 10
2.3.4.1. Keyboard Focus and Screen Navigation 11
2.3.4.2. Accessible Theme Screen Navigation 12
2.4. Logging Out of the Current CV Session 13
3. Using CV 13
3.1. About Search 15
3.1.1. Searching Provider Groups 15
3.1.2. Searching Providers 16
3.1.3. Searching Patients 17
3.2. About Provider Groups and Facilities 19
3.2.1. Editing Provider Groups 20
3.2.2. Deleting a Provider Group 21
3.3. About Provider Accounts 22
3.3.1. Creating Provider Accounts 22
3.3.2. Editing Provider Profiles 25
3.3.3. Resetting Provider Passwords 25
3.3.4. Assigning and Unassigning Patients 26
3.3.5. Setting Record Display Limits 29
4. Widgets: What Community Providers See 31
4.1. Nondiagnostic Images 32
5. Troubleshooting 35

5.1. Login Page Errors 35
5.1.1. Patient Search Errors 37
6. Acronyms and Abbreviations 38

Table of Figures

Figure 1: CV Authorized Use Only Warning 2
Figure 2: Login Page 5
Figure 3: CV Portal Tools 6
Figure 4: Default View 7
Figure 5: System Status Indicator 7
Figure 6: The CV Settings Dialog 8
Figure 7: Blue UI Theme 9
Figure 8: Gray UI Theme 9
Figure 9: Green UI Theme 10
Figure 10: Accessible (508-Compliant) UI Theme 10
Figure 11: Navigation Using Elements with Keyboard Focus 12
Figure 12: Browse Networks Dialog with Keyboard Focus 13
Figure 13: Default Portal Page (Green Theme) 14
Figure 14: The CCPM Widget 14
Figure 15: Browse Facilities Dialog Box–CCP Provider Groups 15
Figure 16: CV CCP Group Search Too Many Results Notification 16
Figure 17: Browse Facilities Dialog Box–Search Providers 17
Figure 18: My Site Patient Search 18
Figure 19: Enterprise Patient Search 19
Figure 20: Search and Manage CCP Groups Panes 20
Figure 21: Search and Manage CCP Groups Panes, Assigned Providers Edit and Delete Links 21
Figure 22: Provider Group Deletion Error Message 22
Figure 23: Provider Group Has Providers Without Patient Assignments 22
Figure 24: Search Providers and Manage Providers Panes 23
Figure 25: Username Already Exists Error Message 24
Figure 26: Search Providers and Manage Providers Panes 25
Figure 27: CCP Password Reset 26
Figure 28: Search Providers Pane 27
Figure 29: Manage Providers Fields Detail 28
Figure 30: Patient Search Dialog Box 28
Figure 31: Data Access Controls 30
Figure 32: Widget Display on the Patient Portal 31
Figure 33: Pain Management Widget (Minimized View)–Nondiagnostic Images 32
Figure 34: Radiology Exams Widget (Minimized View)–Nondiagnostic Images 32
Figure 35: Radiology Exams Detail–Nondiagnostic Images 33
Figure 36: Single Encounter Nondiagnostic Image 33
Figure 37: Multiple Radiology Nondiagnostic Images 34

Figure 38: Progress Note Images–Unable to Retrieve Images Error 34

Table of Tables

Table 1: Keyboard Accessible Keystrokes 11
Table 2: Assignment Rules Examples 29
Table 3: Login Page Error Message Troubleshooting 35
Table 4: Patient Search Error Messages and Resolution Steps 37
Table 5: Acronyms and Abbreviations 38

1. Introduction

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

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

This User Guide is intended for VA Staff users who use the functionality within the **Community Care Provider Management (CCPM)** widget of CV to:

- Create and edit providers
- Assign patients
- Search patient assignments
- Manage patient data access parameters

NOTE: There are notations throughout this guide to indicate functionality that is available only to CV Portal Administrators, VA Staff users with administrative privileges.

NOTE: CV is designed to improve the community providers' ability to view comprehensive VA health information for Veterans. CV does **NOT** replace the creation and uploading of documentation packages to the Third-Party Administrator (TPA) portals. VA Administrative Staff must continue to create and upload documentation packages as specified in their facility's current SOP.

Please read and bear in mind the warning displayed in Figure 1 before using CV.

Figure 1: CV Authorized Use Only Warning

YOU ARE ACCESSING A U.S. GOVERNMENT (USG) INFORMATION SYSTEM (IS) THAT IS PROVIDED FOR USG-AUTHORIZED USE ONLY.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG-authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests--not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential.

I Accept

1.1. Purpose of the Guide

The purpose of this user guide is to familiarize VA Staff with the important features and navigational elements of the **CCPM** widget of CV.

1.1.1. Guide Conventions

This document is designed for both online and hardcopy consumption.

- Cross-References are indicated by blue, underlined text, and provide a hyperlink to figures, tables, and other sections within this guide
- Emphasis is expressed by **bold**, underlined, and *italicized* text
- The information symbol calls the reader's attention to additional information

1.1.2. Terminology

The following standard terms are used throughout this guide:

- **VA Staff Portal:** The landing page, or default view, of CV that appears after logging in; the portal page displays widgets and the tools that enable quick access to basic features
- **Widget:** A component of the CV interface that enables a user to view information or perform a function
- **Widget Tray:** An expandable and collapsible tray at the bottom of the portal page that provides access to the widgets available for placement on the portal page

1.2. Assumptions

The user guide is written from the perspective of VA Staff and assumes that:

- You can open, navigate, and use a web browser
- You can use web-based applications, their menu options, and navigation tools
- You have the Uniform Resource Locator (URL) for the CV **Login** page, system user names, a Personal Identification Verification (PIV) card, and the Access/Verify codes required to launch CV
- You use CCPM to make patient assignments to providers and manage providers who practice outside the VA network

1.3. System Requirements

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

NOTE: This release does not support mobile devices.

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

- Internet Explorer (IE) v11
- Chrome v70
- Microsoft Edge v42
- Safari v12

1.4. Getting Help

Authorized users who have trouble logging in to CV or experience other application issues should call the Enterprise Service Desk (ESD) for assistance or create a ticket using the YourIT self-service portal.

IT Enterprise Service Desk
Phone: 855-673-4357
YourIT Self-Service Portal: https://yourIT.va.gov

Prior to contacting the ESD for support, please refer to Logging in to CV for detailed information about how to access CV, and to Troubleshooting for suggested resolution steps and troubleshooting information.

2. Logging in to CV

Before logging in to and utilizing the functionality of the **CCPM** widget, please read the Sensitive Information warning in the Introduction.

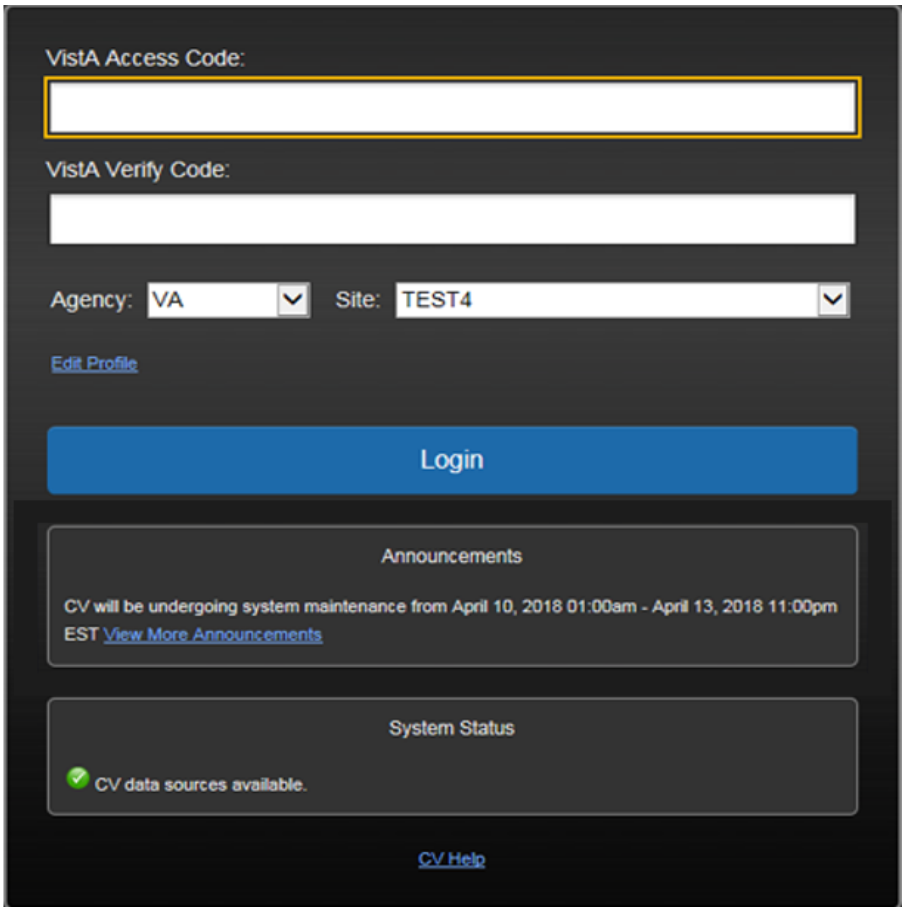
CV authenticates all VA users using their PIV card and their VistA Access and Verify codes. During log in, first-time CV users are prompted to enter their agency, site, and user settings. This data is used to create a CV user profile, and it is utilized during future login sessions.

1. Ensure your PIV card is inserted into your computer or card reader
2. Open a supported Internet browser
3. Enter the URL for the CV web application into the address bar of the browser
4. When prompted with a certificate list, select the PIV Authentication certificate
5. When prompted, enter your PIV Personal Identification Number (PIN)
6. Click **I Accept** after reading the important user consent information regarding accessing a Government information system (Figure 1)
7. Enter the following information in the fields on the **Login** page (Figure 2):
   a. VistA Access code
   b. VistA Verify code
   c. Select "VA" from the **Agency** field
   d. Select your local VistA host site from the **Site** dropdown

   NOTE: Users should review the Announcements and System Status panes on the **Login** page for information that may impact CV functionality or data availability. See Viewing Announcements and Viewing System Status for detailed information.

8. Click **Login**

Figure 2: Login Page



NOTE: Users who are not authorized to access CV receive an "*Access denied*" message. If you believe you have received the message in error, please contact the ESD. See Getting Help for details.

2.1. System Notifications

The CV **Login** page displays system notifications to alert you to system outages, scheduled system activities, and important upgrades. The **Login** page also displays a notification when your VistA Verify code must be reset. The **CV Help** link opens CV online help, which guides you through the steps to reset your Verify code.

2.1.1. Viewing Announcements

System announcements are provided by the VA and displayed on the **Login** page when scheduled system activities may impact the user or CV system availability. The **View More Announcements** link opens additional announcement information.

NOTE: Announcements are separate from the system status messages displayed on the **Login** page. See Viewing System Status for details.

2.2. Editing Your User Profile at Login

Users can customize their profile from the **Login** page. First-time CV users are prompted to enter their agency, site, and User Interface (UI) theme settings before logging in. Once saved, the profile information is used each time you log in to CV.

UI theme preferences can also be set within CV. See Profile Settings.

1. Click the **Edit Profile** link on the **Login** page
   a. Profile options are presented
2. Enter your VistA Access and Verify codes in the fields provided
3. Enter your agency and site in the fields provided
4. Select the desired UI theme
5. Click **Save** and **Login**

2.3. The CV Portal Pages

The CV portal pages have tools that enable quick access to basic features. These tools appear in the upper right corner of the application window (Figure 3).

- **Select the UI theme:** Click **Settings** to select the UI theme (See Profile Settings)
- **Access online help:** Click **Help** to open web-based, online help
- **Log out:** Click **Logout** to terminate the current CV session

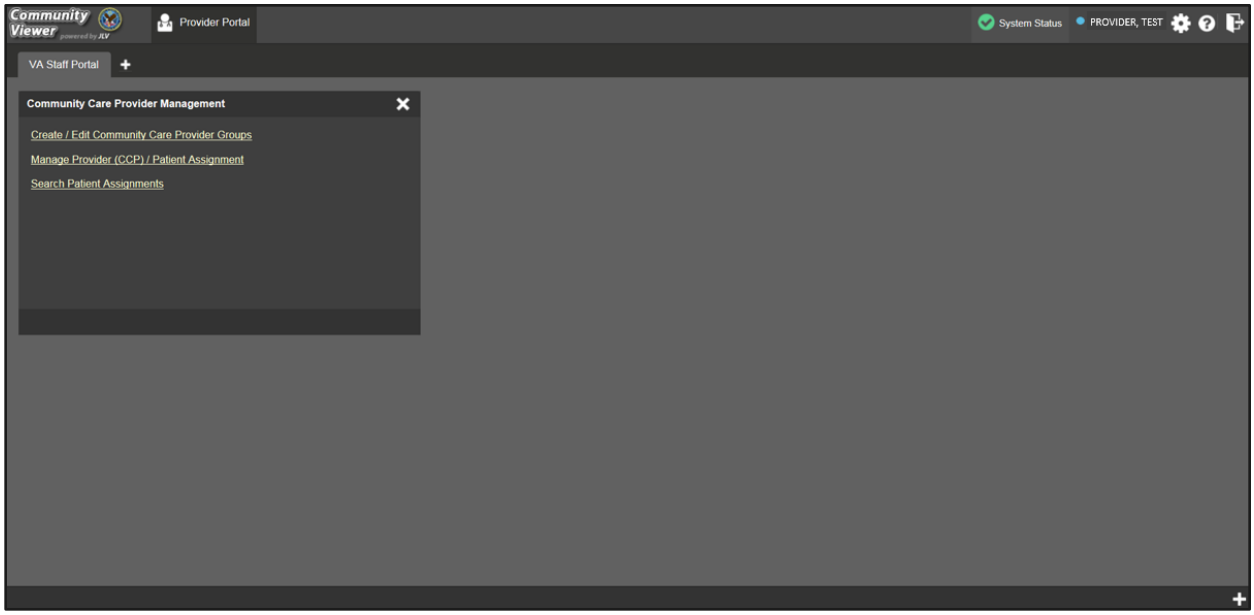
Figure 3: CV Portal Tools

2.3.1. Default View

After logging in to CV, the **VA Staff Portal** opens. The default view of the **VA Staff Portal** includes the **CCPM** widget (Figure 4).

NOTE: If the **CCPM** widget is not displayed, click the plus + sign in the lower right corner of the screen (Figure 4) to open the **Widget Tray**. Click, hold, and drag the icon from the **Widget Tray** to the screen, and drop the widget in the desired location.

Figure 4: Default View



2.3.2. Viewing System Status

CV's Health Monitor provides system status updates and monitors the services CV uses to connect to VA data sources. The services that are monitored include: Master Veteran Index (MVI), VistA Data Service (VDS), and jMeadows Data Service.

The system status is displayed in two areas:

1. On the **Login** page (Figure 2)
2. Atop the **VA Staff** portal page (Figure 5)

When all monitored systems and services are online and connected, a green icon appears next to the status with the message, *"CV data sources available"* (Figure 2).

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

When CV's Health Monitor is unable to retrieve and report system status information, a red icon appears with the message, *"System status is unavailable."* When this status appears, you may not be able to log in to CV or view patient data until the connection is restored. See Getting Help for information on how to contact the ESD.

Figure 5: System Status Indicator

2.3.3. Profile Settings

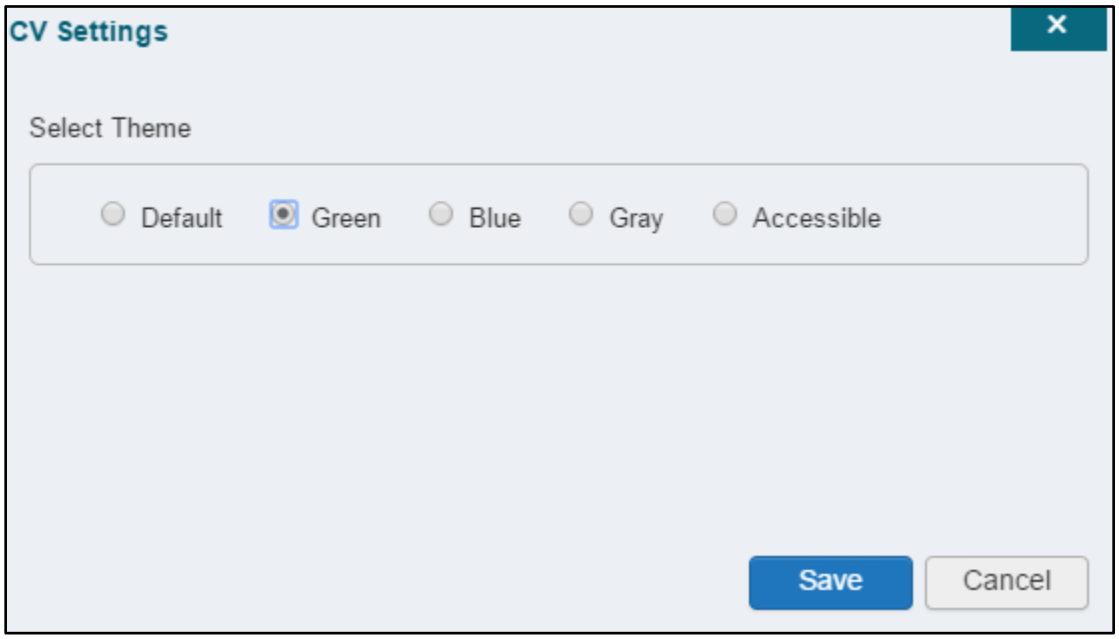
Profile settings are accessible within CV by clicking **Settings** located in the upper right corner of the portal pages (Figure 4).

> **NOTE:** The configuration options are limited to choosing a UI theme in this release.

Selecting a **UI Theme** sets the font color, foreground, and background colors of the CV Graphical User Interface (GUI). Themes apply to all application elements, including widgets, toolbars, and dialog boxes. Theme choices are Default, Green, Blue, Gray, and Accessible. The Accessible theme (Figure 10) is 508-compliant, and it is designed to work with the accessibility tools installed on a user's device.

1. Click **Settings** in the upper right corner of the portal pages
2. The **CV Settings** dialog opens (Figure 6)
3. Click the radio button next to the desired theme
4. Click **Save**
5. Click **Cancel** to exit the **CV Settings** dialog and restore the previous theme

Figure 6: The CV Settings Dialog



UI theme choices are displayed in the following figures. The Default theme was presented in Default View, Figure 4.

Figure 7: Blue UI Theme

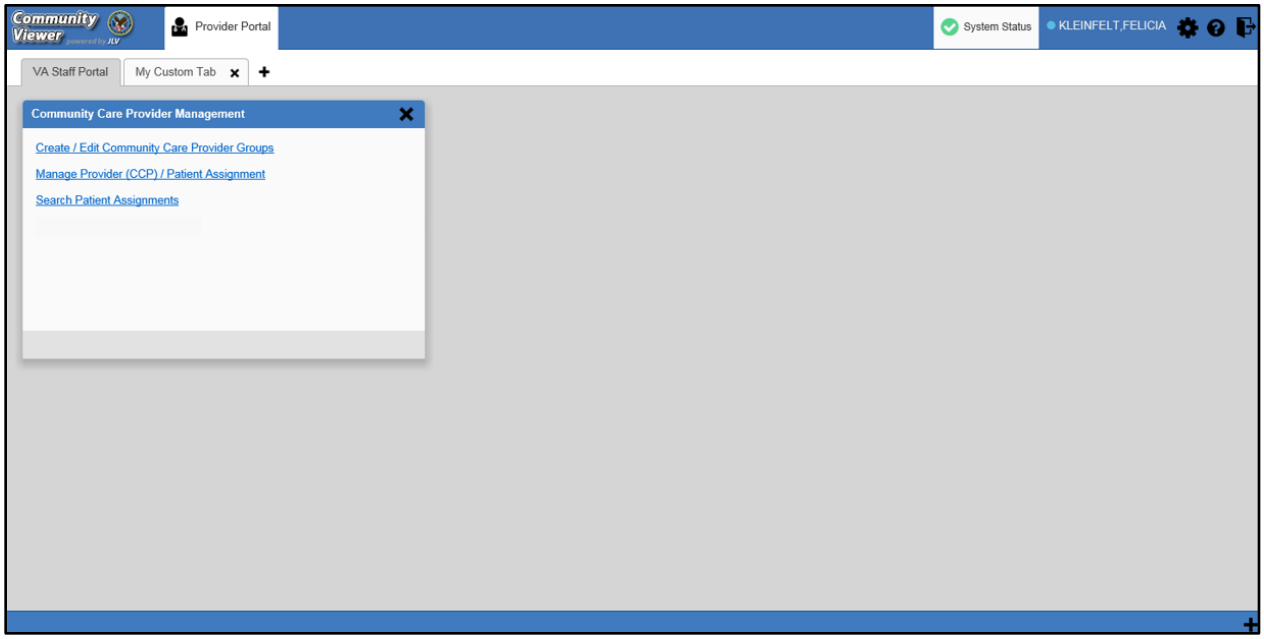


Figure 8: Gray UI Theme

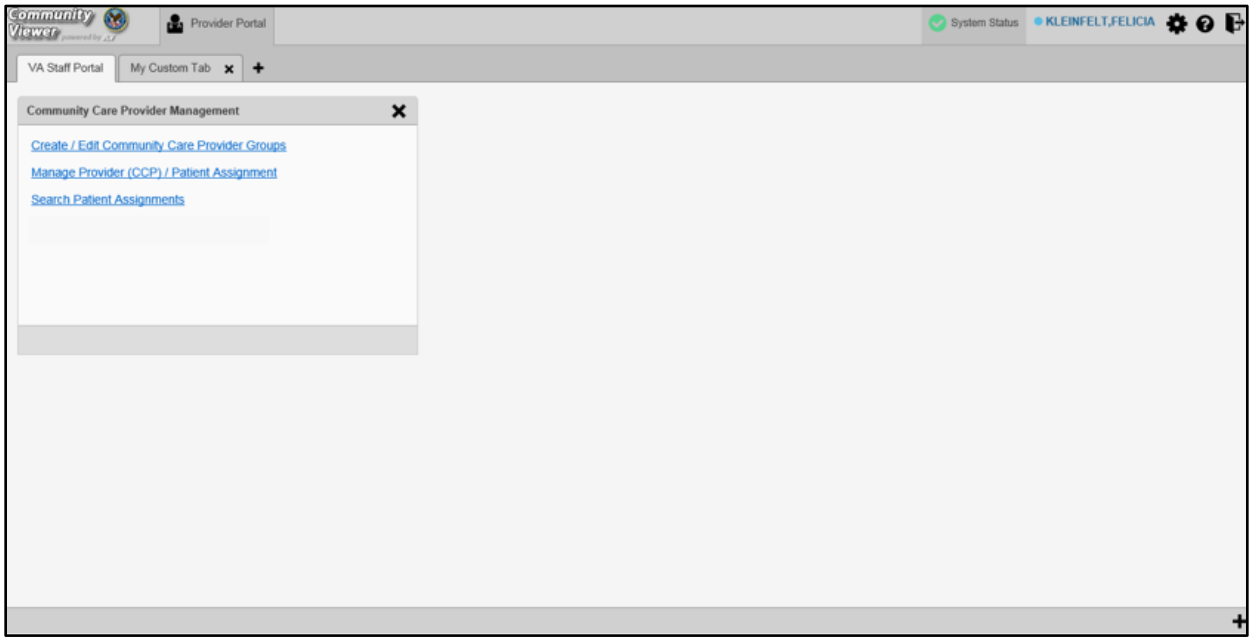


Figure 9: Green UI Theme

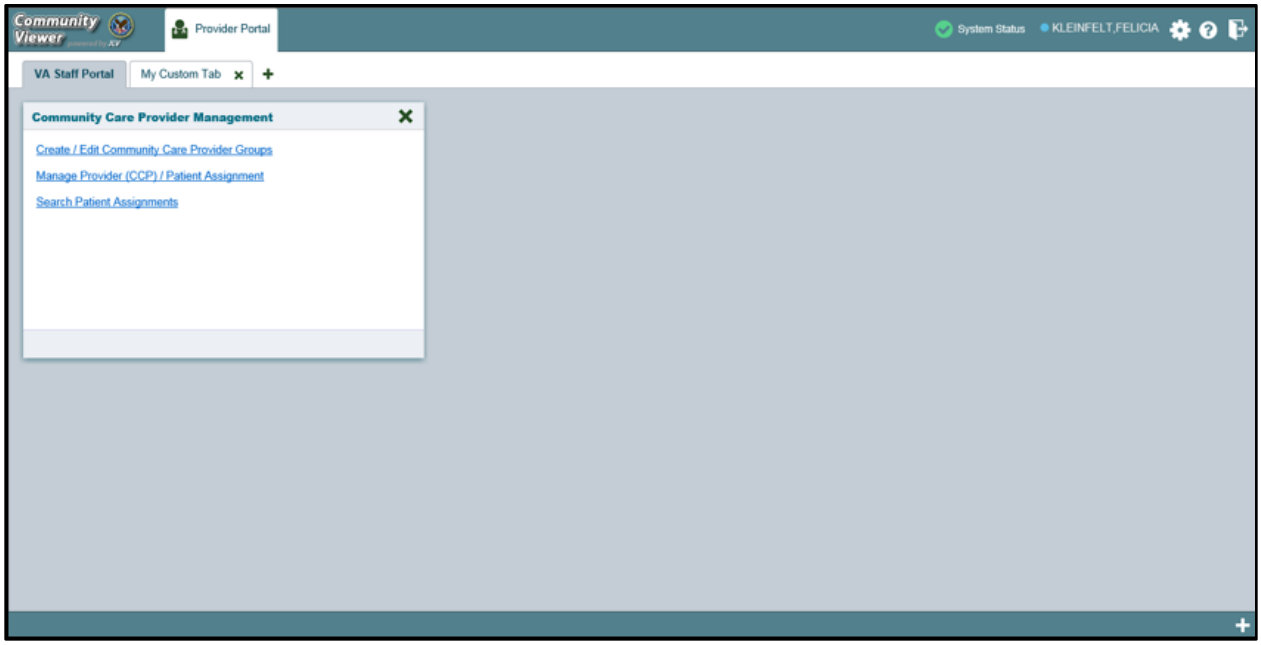
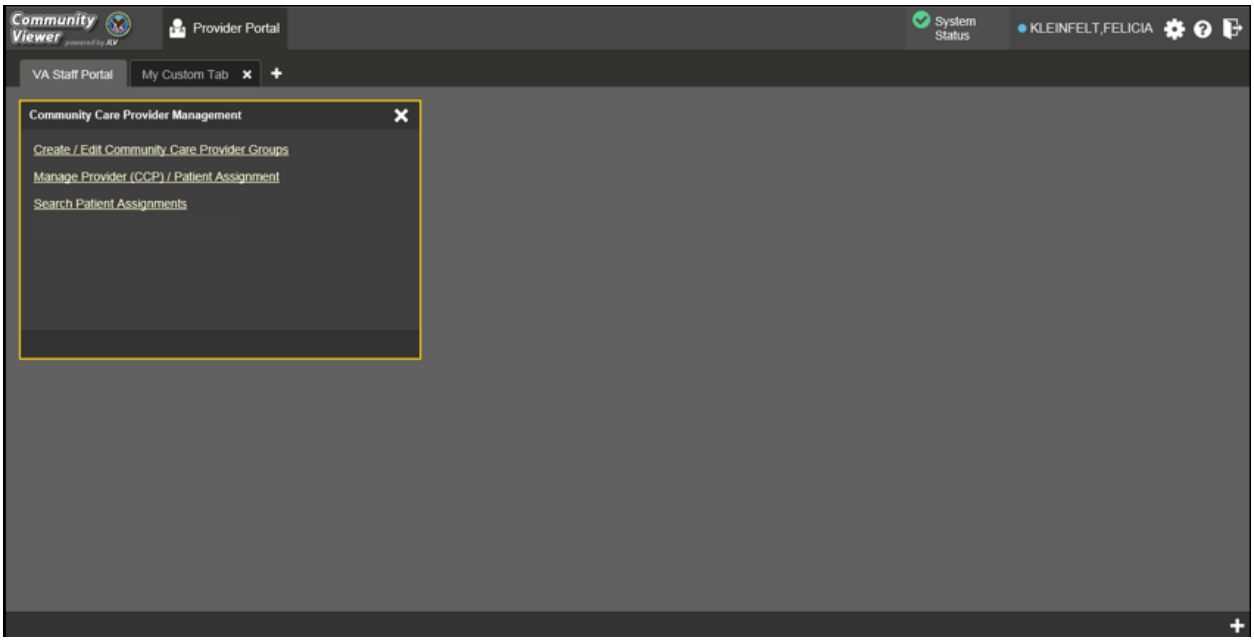


Figure 10: Accessible (508-Compliant) UI Theme



2.3.4. Using the Accessible Theme's Functionality

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

NOTE: The Accessible theme is available for users who have adaptive technologies installed on their computers.

2.3.4.1. Keyboard Focus and Screen Navigation

Keyboard focus is the highlighting of screen elements that enables interaction with, and the navigation of, the web application through the keyboard and keystrokes. The screen element in focus is outlined in gold (Figure 10) as a visual indicator of keyboard focus.

CV enables the use of Windows keystrokes (**Tab**, **Shift + Tab**, arrow keys, **Enter**), and keyboard shortcuts to move the focus to all menus, and activate all functions on the menus. All UI items are accessible via the keyboard under the Accessible theme.

Pressing **Enter** or the **Spacebar** when an element that provides action is in keyboard focus performs the associated action. Pressing **Enter** or the **Spacebar** when the **Settings** icon ⚙ is in focus, for example, opens the **CV Settings** dialog. Using the arrow keys or the **Tab** key allows a user to move between keyboard focus items to navigate through screen elements. Table 1 provides a complete list of accessible keystrokes.

Table 1: Keyboard Accessible Keystrokes

Keystroke	Description
Application and Portal Navigation	
Alt+4	Press to transfer keyboard focus to the main or top screen element: Focus is transferred to the **Provider** portal tab on a portal page. Focus is transferred to the first link or data element in a widget. Focus is transferred to the dialog box's **Close** button (**X**).
Alt+5	Press on a page with two panels to toggle keyboard focus between the main or top element on left and right panels.
ENTER	Press to transfer keyboard focus to the highlighted widget.
TAB	Press to transfer keyboard focus to other UI items.
ESC	Press to return keyboard focus to the panel containing the UI item with keyboard focus or to exit a window or widget.
SPACEBAR	Press to activate any UI item (for example, click an icon).
Arrow Keys	When keyboard focus is on a widget, press the arrow keys to change page viewing in a widget's data table. When keyboard focus is on a dropdown, press the down arrow to view the contents.
Portal Tabs	
Arrow Keys	Use the left and right arrow keys to navigate between tabs. Add a Tab: 1) Press the right arrow key until **Add Tab (+)** is in focus. 2) Press **Enter.** 3) The new tab dialog box opens and prompts you to enter a name for the new tab.
TAB	Press one or more times when focus is on a portal tab to place the (**+**) in keyboard focus.
ENTER	Press while the (**+**) is in focus to add a new portal tab. A dialog prompts the user to enter a name for the tab.

Keystroke	Description
ESC	Focus on a tab and press **ESC** to remove it.
Windows and Dialog Boxes	
TAB	Press the **Tab** key to move the keyboard focus to other UI items within the window.
Adding Widgets to the Portal Pages	
Alt + 1, 2, or 3	Add a widget to a **Portal** page from the **Widget Tray**: 1) Determine in which column (1, 2, or 3) of the **Portal** page to place the widget. 2) Focus on the desired widget icon in the **Widget Tray**. 3) Press Alt + 1, 2, or 3, depending on the desired column.

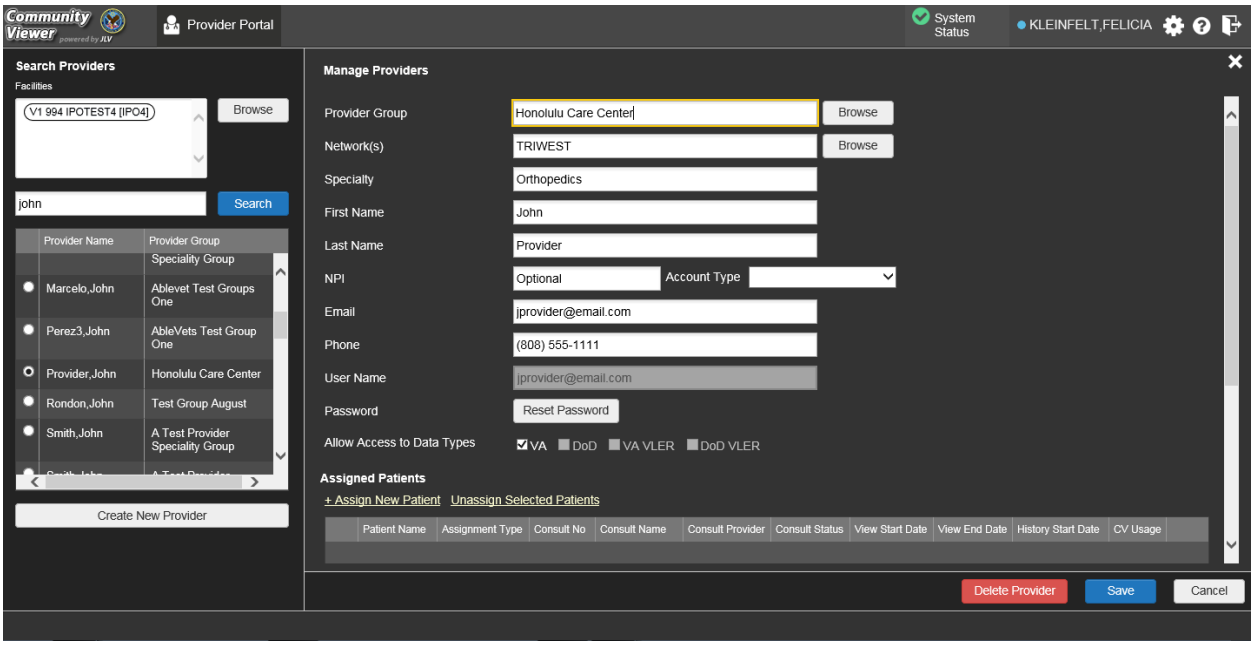
2.3.4.2. Accessible Theme Screen Navigation

An element with keyboard focus is the starting point for screen navigation. Pressing the **Enter** or **Spacebar** keys when a screen element or icon has keyboard focus mimics a mouse click.

Figure 11 depicts the **Manage Providers** pane with **Provider Group** field as the keyboard focus. Focus can be changed by pressing **Tab** key. Pressing the **Tab** key in this example shifts the keyboard focus from the **Provider Group** field to the field immediately below the **Provider Group** field. Press **Shift** + **Tab** to navigate back up through the fields. Pressing the **Alt** + **4** keys shifts the keyboard focus back to the **Provider Group** field.

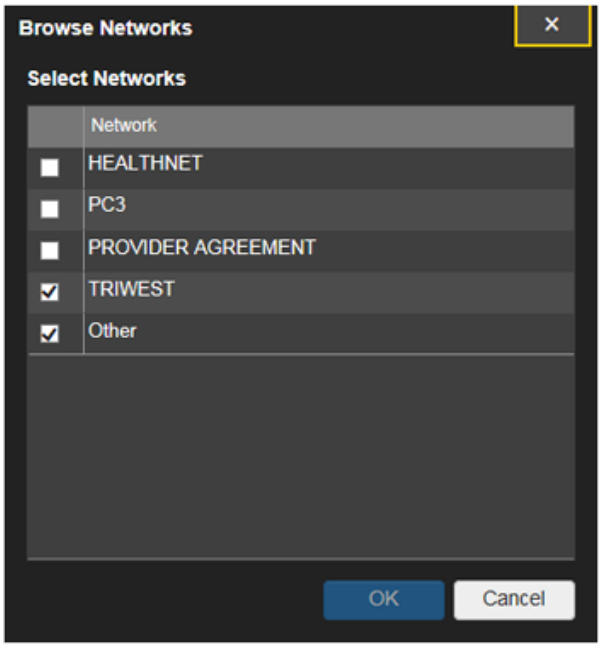
NOTE: Focus on the element within the widget that has hover text. After a small delay, the text appears as if the user hovered over the element with a mouse cursor.

Figure 11: Navigation Using Elements with Keyboard Focus



The **Browse Networks** dialog opens with **Close (X)** as the keyboard focus (Figure 12). Focus can be changed by pressing the **Tab** key. Pressing the **Tab** key in this example shifts the keyboard focus to the checkbox of listed networks. Pressing the **Spacebar** key to check or uncheck the checkbox. Move to **OK** and press **Enter** to save changes. Press **Alt** + **4** keys shifts focus to **Close (X)** and press **Ente**r to close dialog box without changes.

Figure 12: Browse Networks Dialog with Keyboard Focus



2.4. Logging Out of the Current CV Session

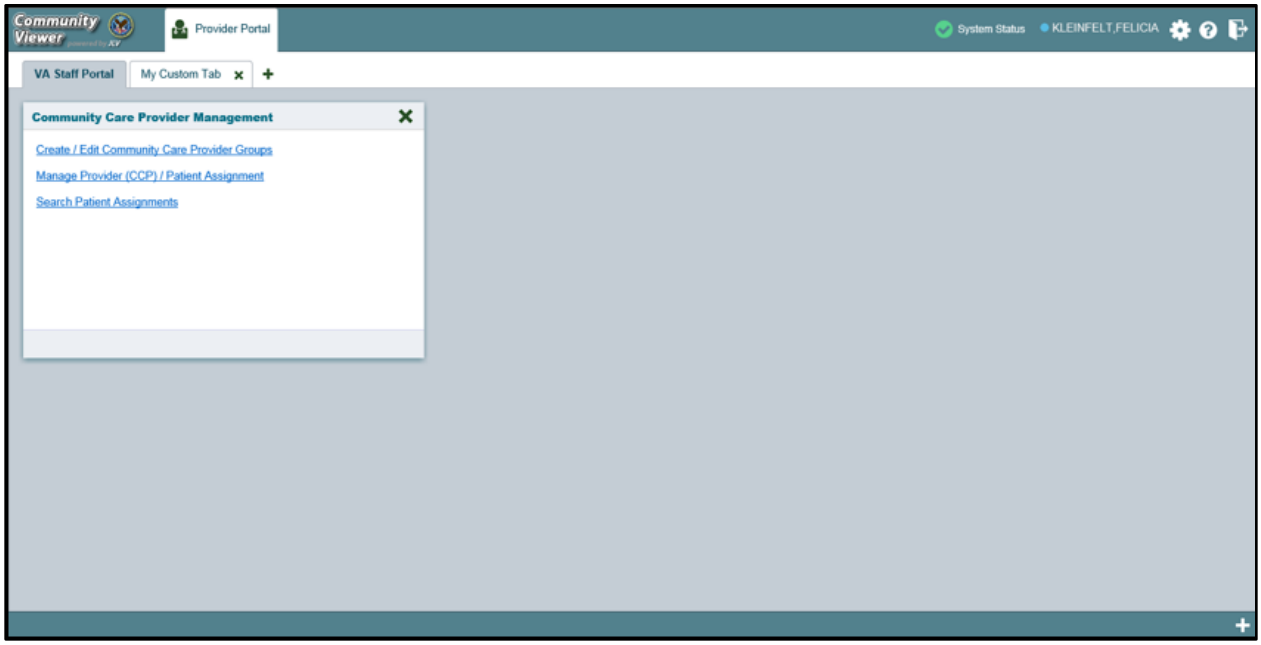
You may intentionally log out to end a CV session by clicking **Logout** at any time. If you fail to log out, the current session terminates automatically after 30 minutes of inactivity. You are redirected to the **Login** page when any new activity is attempted.

3. Using CV

After logging in, VA Staff see the **CCPM** widget on the **VA Staff** portal tab by default.

> **NOTE:** If the **CCPM** widget is not displayed, click the **plus +** icon in the lower right corner of the portal page (Figure 13) to open the **Widget Tray**. Click, hold, and drag the icon from the **Widget Tray** to the portal page, and drop it in the desired location.

Figure 13: Default Portal Page (Green Theme)



VA Staff create providers, assign patients to CCPs, and grant the CCP limited access to patient records within the **CCPM** widget.

There are three workflow options (Figure 14) within the **CCPM widget**:

- Create/Edit Community Care Provider Groups
- Manage Provider (CCP)/Patient Assignment
- Search Patient Assignments

Figure 14: The CCPM Widget

3.1. About Search

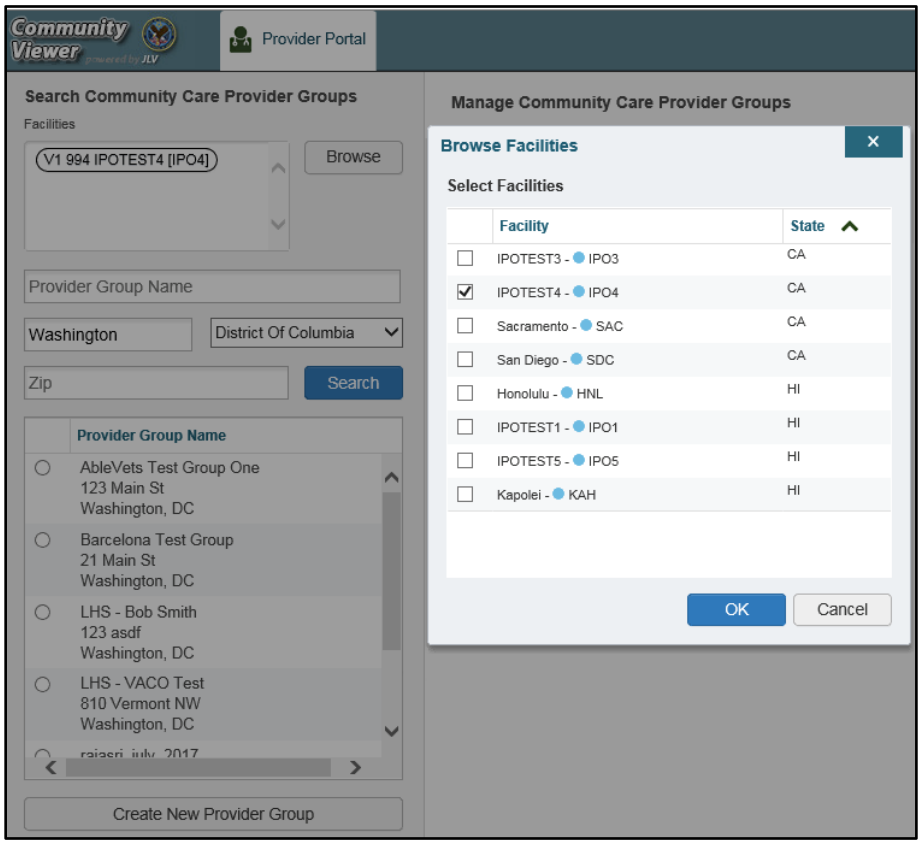
CV's search features are used to find a provider group, a provider, or a patient.

3.1.1. Searching Provider Groups

When using the **Create/Edit Community Care Provider Groups** feature, users can perform a detailed search within the **Search Community Care Provider Groups** pane (Figure 15):

- Search by facility (Veterans Integrated Service Network [VISN], site identification [ID], facility name, and facility short name), provider group name, city and state, or zip code
- Sort the facilities list by state, when browsing for a facility

Figure 15: Browse Facilities Dialog Box–CCP Provider Groups

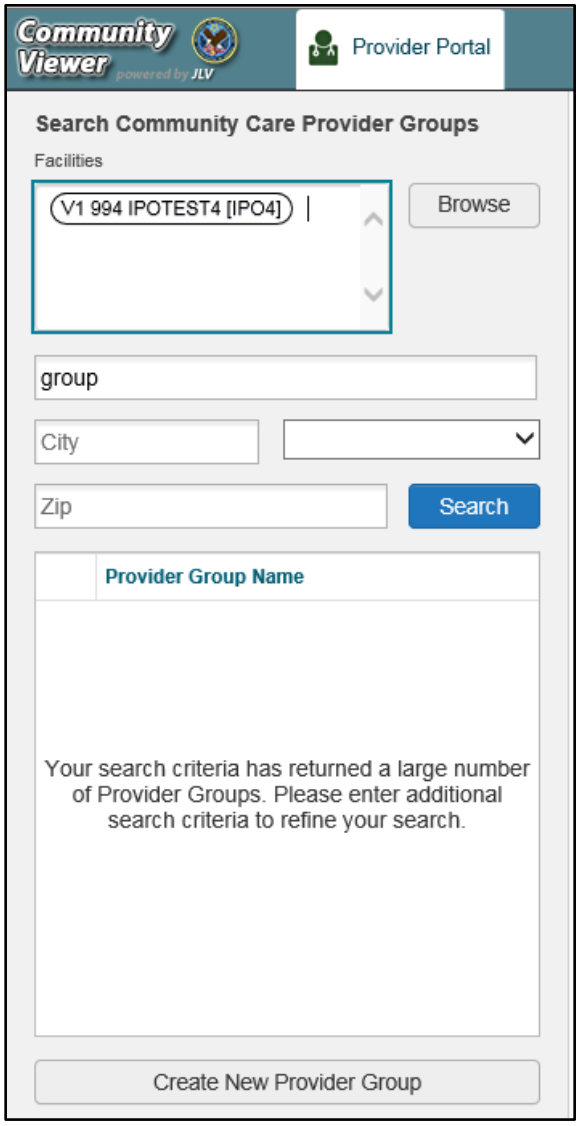


When searching for a Community Care Provider Group, users:

- See the provider group name and address within the search results
- Receive a notification to refine the search by inputting additional search criteria when a large number of results are returned (Figure 16)

NOTE: Figure 16 and Figure 28 depict searches within and information from test databases.

Figure 16: CV CCP Group Search Too Many Results Notification

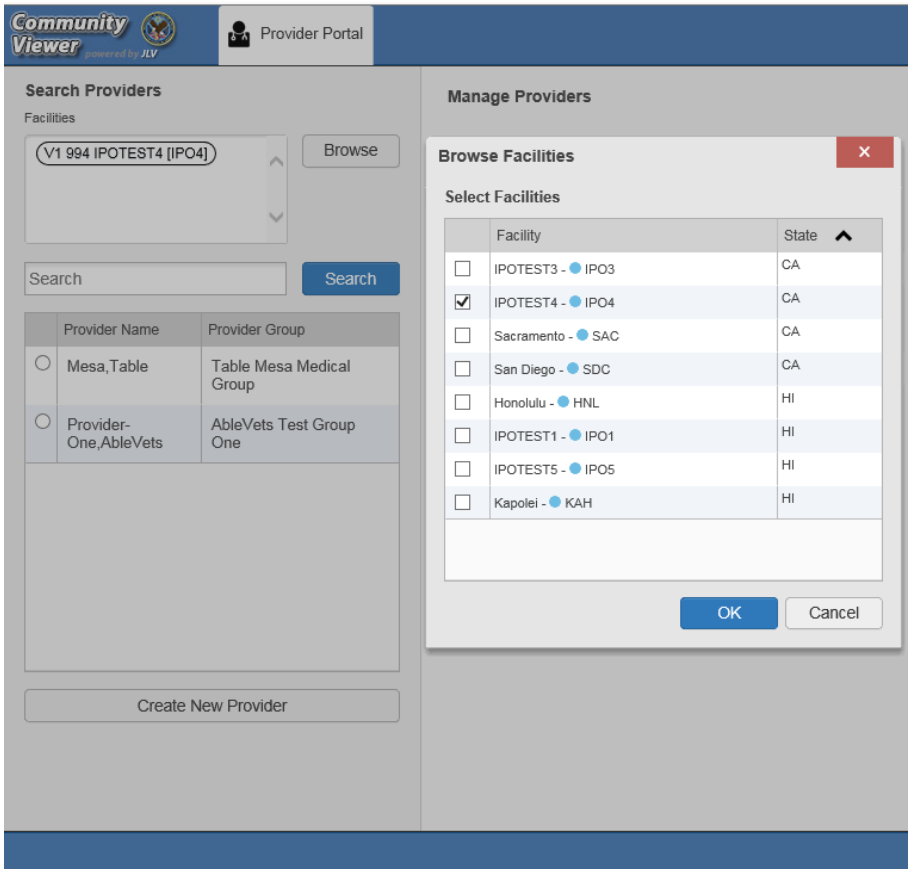


3.1.2. Searching Providers

When using the **Manage Provider (CCP)/Patient Assignment** feature, users can perform a detailed search within the **Search Providers** pane (Figure 17):

- Search by facility (VISN, site ID, facility name, and facility short name), provider group name, or provider name
- Sort the facilities list by state, when browsing for a facility

Figure 17: Browse Facilities Dialog Box–Search Providers



When searching for a provider, users see the provider name and provider group within the search results.

3.1.3. Searching Patients

There are two types of patient searches in CV from the **Search Patient Assignments** feature:

- **My Site Search:** Searches the user's local VistA (also known as facility or site); the patients listed in the search results are registered to that local VistA only
- **Enterprise Search:** Searches all VistAs across the Enterprise; the patients listed in the search results are registered to one or more VistAs

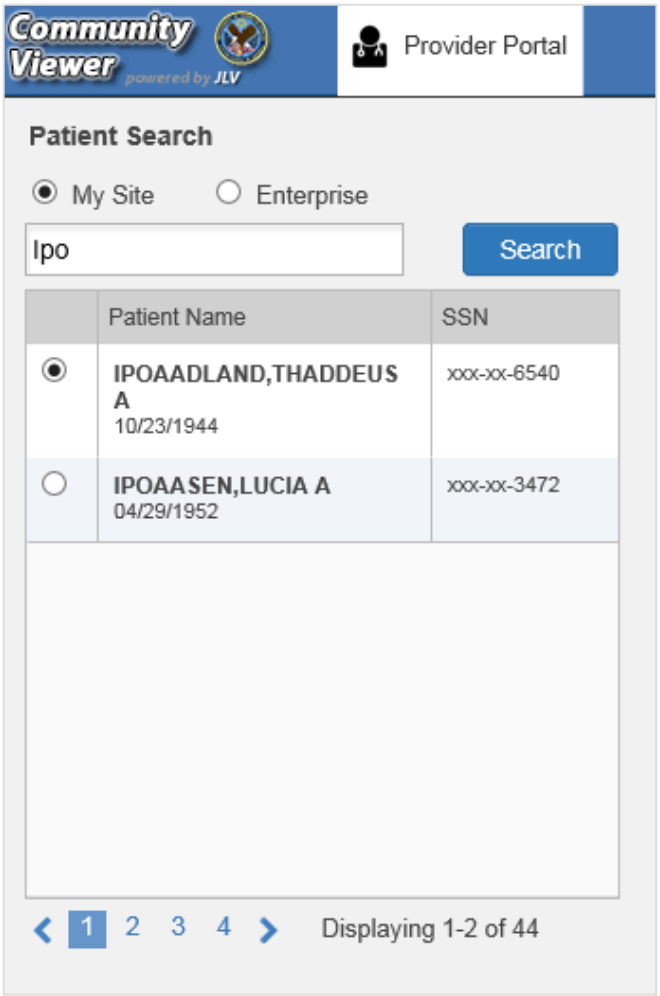
When searching for a patient within your site:

1. Select the **Search Patient Assignments** link from the **CCPM** widget
2. Confirm the **My Site** radio button is selected by default
3. Enter search criteria into the **Patient Search** field:
   a. A minimum of two characters of the patient's last name **-OR-**
   b. The patient's last name, followed by a comma and either the first initial or full spelling of the patient's first name (Smith, J or Smith, John) **-OR-**
   c. The patient's full SSN (123456789) **-OR-**

d. The first letter of the patient's last name followed by the last 4 digits of the patient's SSN (S6789)

4. Click **Search** or press **Enter**

Figure 18: My Site Patient Search

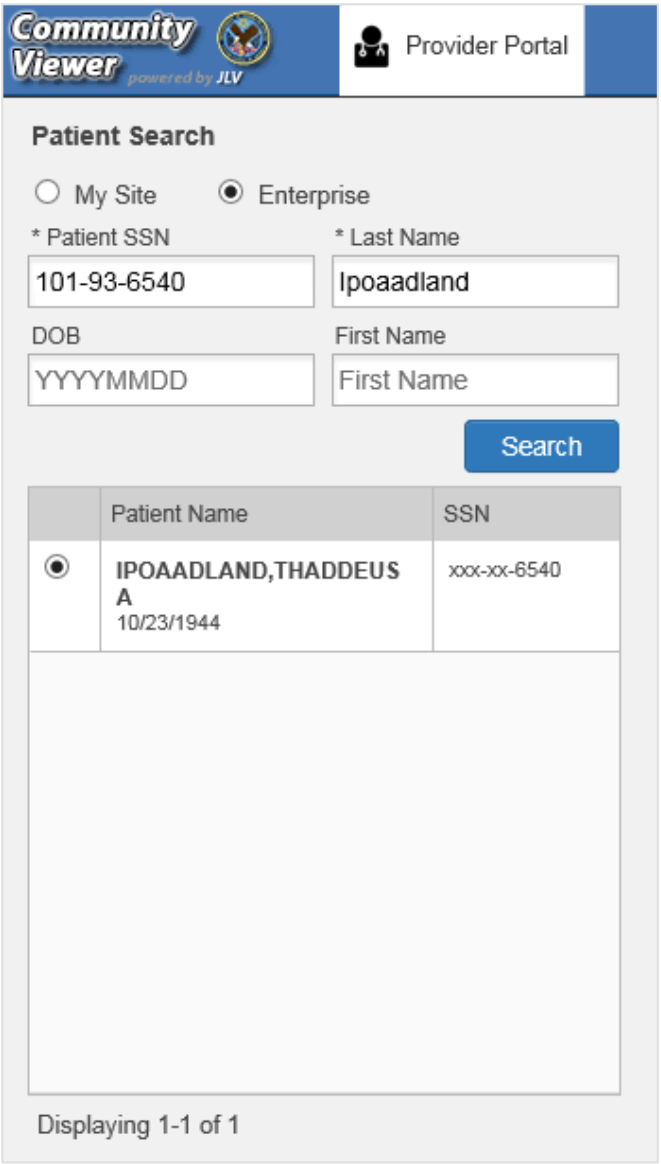


When searching for a patient across the Enterprise:

1. Select the **<u>Search Patient Assignments</u>** link from the **CCPM** widget
2. Select the **Enterprise** radio button
3. Enter the patient's Social Security Number (SSN) into the required **Patient SSN** field
4. Enter the patient's full last name into the required **Last Name** field
5. Enter the patient's date of birth (DOB) in the optional **DOB** field
6. Enter the patient's first name in the optional **First Name** field
7. Click **Search** or press **Enter**

When using the **Patient Search** and the **Patient Assignment** search features, search results display with the ability to scroll through multiple pages or select a specific page.

Figure 19: Enterprise Patient Search



Please see Assigning and Unassigning Patients for detailed instructions on how to run a **My Site** or **Enterprise** search from the **Manage Providers pane**.

3.2. About Provider Groups and Facilities

Before a user can assign a patient to a CCP, the CCP must be assigned to a provider group.

CV has been prepopulated with over 200,000 groups and providers. Users can edit existing groups, but in this release, the task of creating provider groups is performed by CV Portal Administrators. Users should contact a CV Portal Administrator to request the creation of a new group.

NOTE: Provider groups are validated on the combination of the group name and street address to avoid the creation of duplicates.

Each group is associated with one or more local VA sites, referred to as *Facilities*. A facility is a local VA site. Provider groups can contain one or more VA facilities.

EXAMPLE 1: Dr. Hanyok works with a family practice called Evergreen Health Care. Dr. Hanyok is the *Provider* in this example, and Evergreen Health Care is the *Provider Group* to which she is assigned.

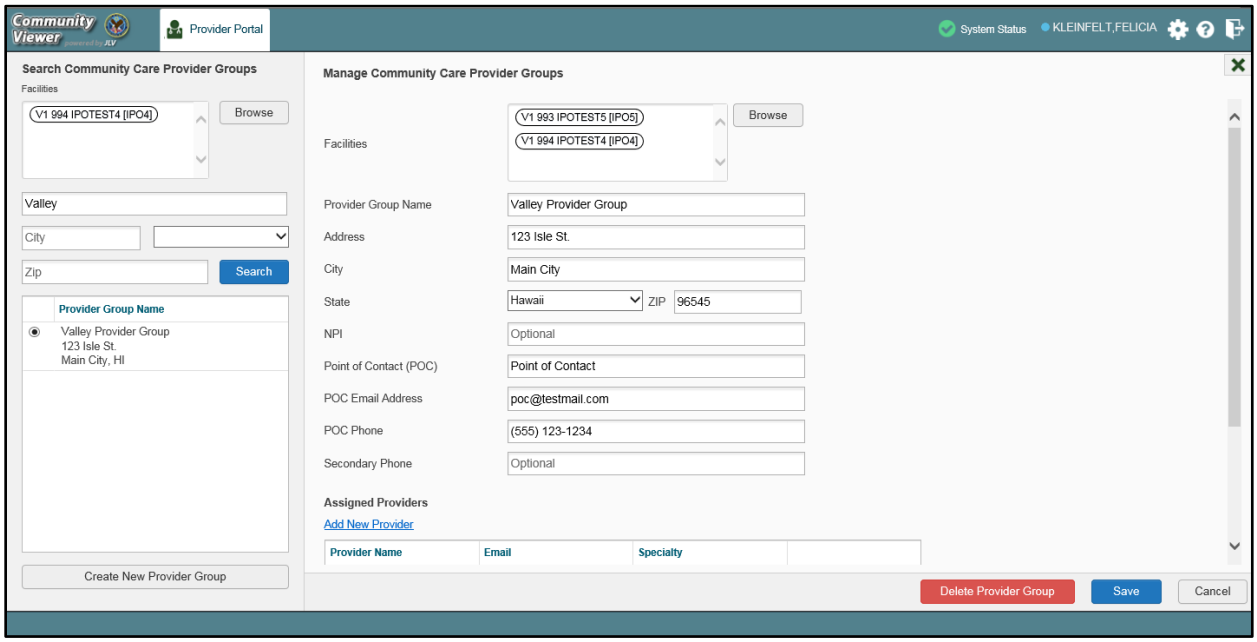
EXAMPLE 2: Dr. Woodroof, the *Provider*, is a sole practitioner. The *Provider Group* name for a sole practitioner may be a business name or can be the provider's name; in this example, Dr. Woodroof.

3.2.1. Editing Provider Groups

Provider groups can be edited through the **CCPM** widget (Figure 20).

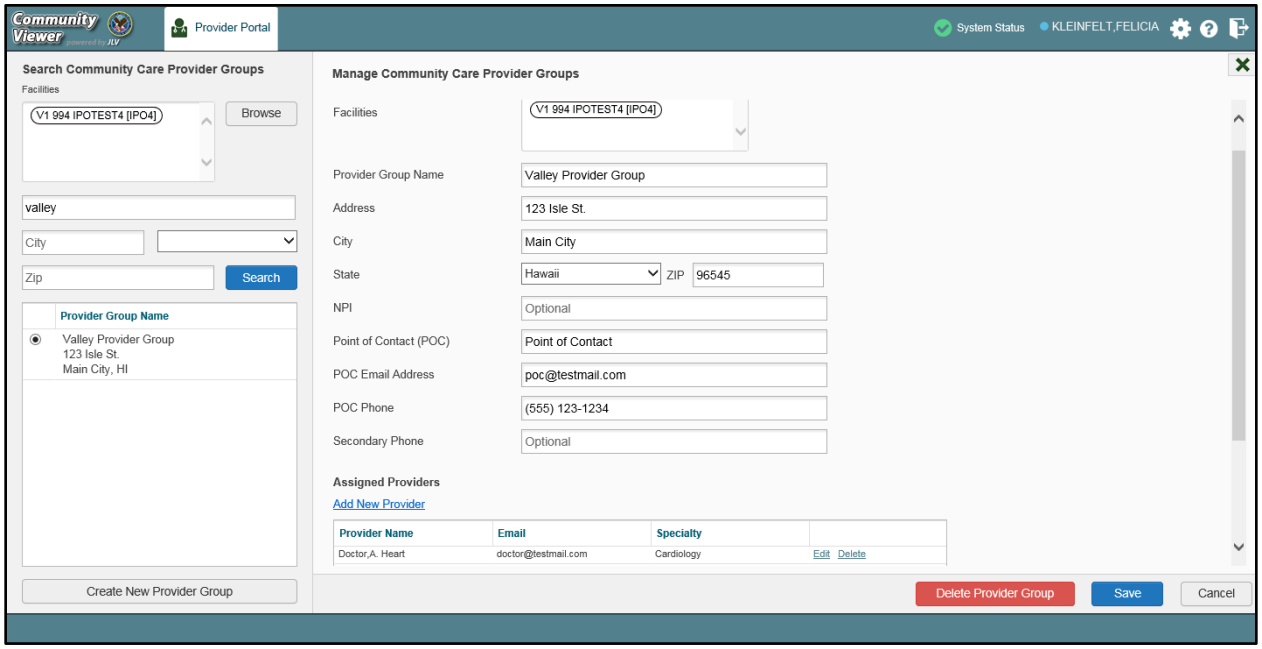
1. Click the **Create/Edit Community Care Provider Groups** link in the **CCPM** widget
2. Enter the facility, provider group name, city and state, or zip code in the **Search** fields
3. Click **Search**
4. Select the desired provider group from the search results
5. Edit the provider group fields as needed
6. Click **Browse** next to the **Facilities** field, and select the desired facility from the list

Figure 20: Search and Manage CCP Groups Panes



7. Providers assigned to the provider group are listed in the lower right portion of the screen
   a. Edit provider profiles or remove providers from the group using the **Edit** link within the **Assigned Providers** list (Figure 21)
8. Click **Save**

Figure 21: Search and Manage CCP Groups Panes, Assigned Providers Edit and Delete Links



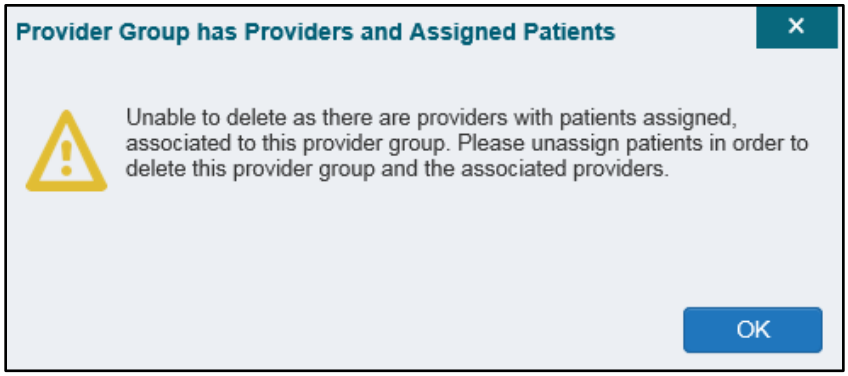
NOTE: Only CV Portal Administrators can add new groups, delete provider groups, and delete providers from a group in this release. VA Staff users cannot see the **Create New Provider Group** button, the **Delete Provider Group** button, or the **Delete** link. Contact a CV Portal Administrator for assistance with these tasks.

3.2.2. Deleting a Provider Group

CV Portal Administrators may only delete a provider group when the individual providers within that group have no patient assignments. If any patients are assigned to a provider within the provider group, the error message in Figure 22 displays. Assigning and Unassigning Patients details steps to unassign patients from an individual provider.

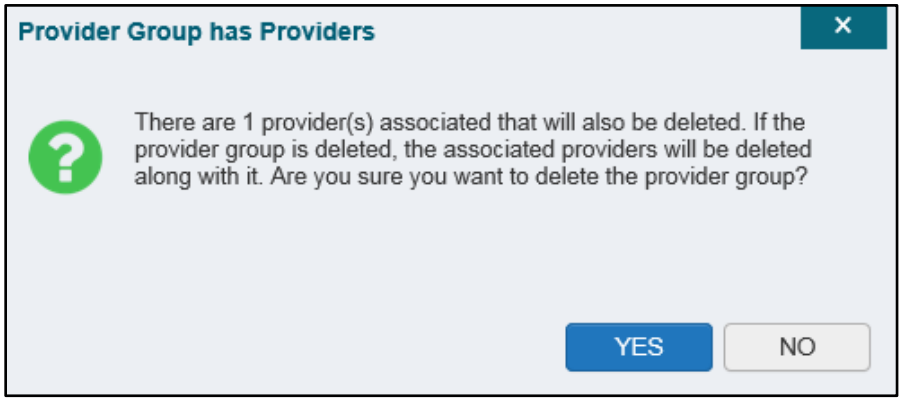
1. Click the **Create/Edit Community Care Provider Groups** link in the **CCPM** widget
2. Enter the facility, provider group name, city and state, or zip code in the **Search** field
3. Click **Search**
4. Select the desired provider group from the search results
5. Select the **Delete Provider Group** button

Figure 22: Provider Group Deletion Error Message



A CV Portal Administrator can delete providers along with their associated provider group if they do not have patients assigned. If the provider group has associated providers that you intend to also delete, select the **Yes** button when prompted.

Figure 23: Provider Group Has Providers Without Patient Assignments



3.3. About Provider Accounts

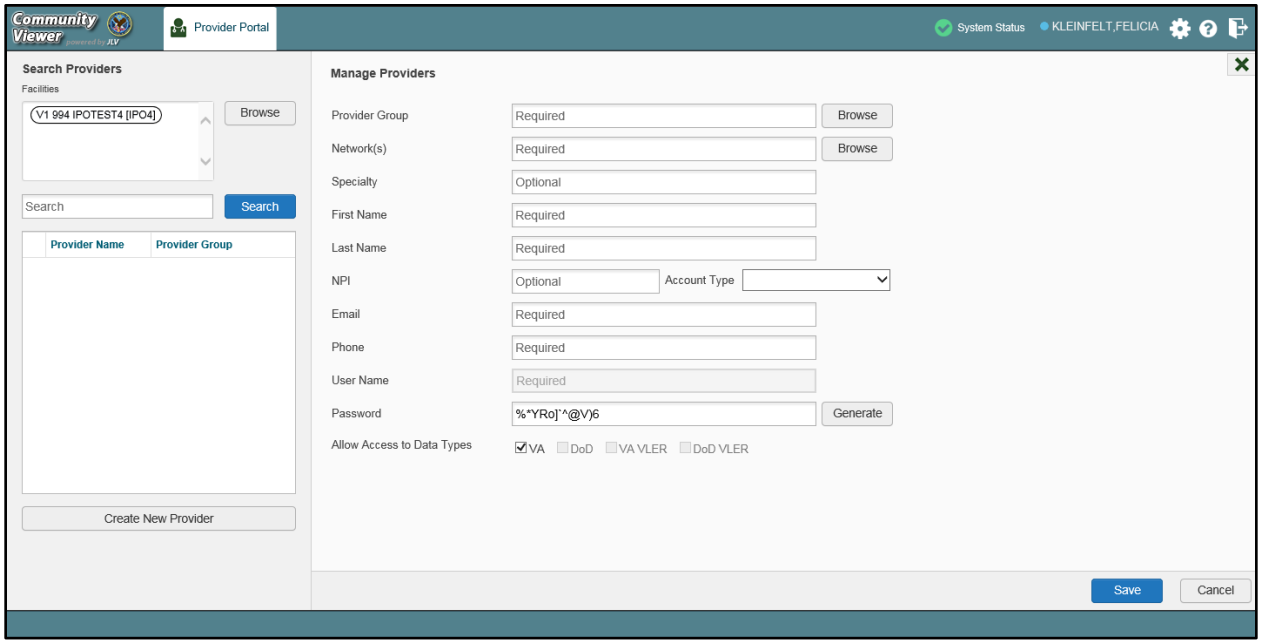
All CCP accounts are created in the **CCPM** widget. When a CCP account is created, so is their user profile.

3.3.1. Creating Provider Accounts

Users can assign patients to CCPs once their account has been created.

1. Click the **Manage Provider (CCP)/Patient Assignment** link (Figure 14) in the **CCPM** widget
2. Click **Create New Provider** in the **Search Providers** pane, on the left side of the application window, as shown in Figure 24
   a. The **Create/Edit Provider** pane opens on the right side of the application window
3. Click **Browse** to the right of the **Provider Group** field to search for an existing group
4. Select the desired group from the list of results and click **OK**

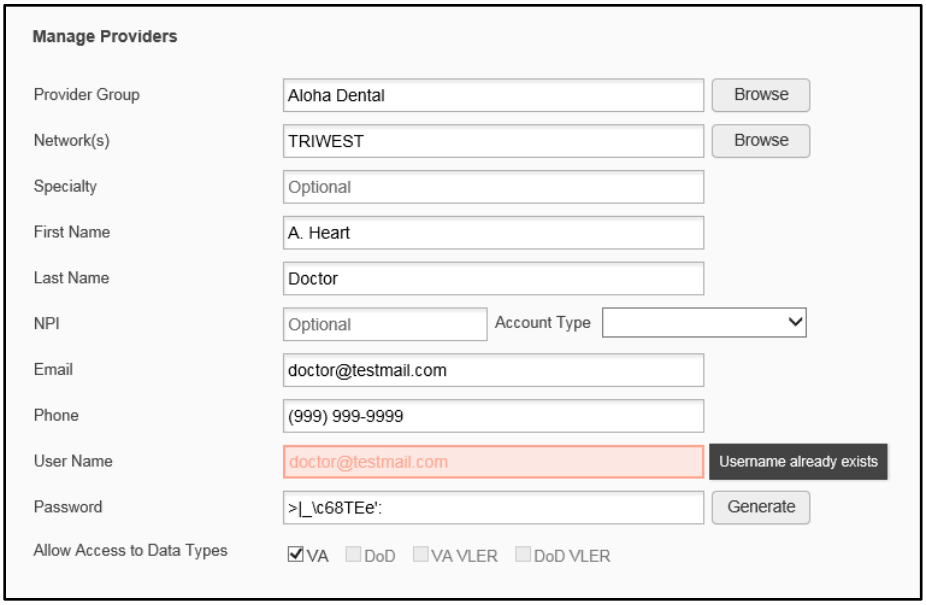
Figure 24: Search Providers and Manage Providers Panes



5. Enter the provider information in each of the required fields on the **Manage Providers** pane (Figure 24)

> **NOTE:** Providers are differentiated by their e-mail address. If a provider is associated with multiple provider groups, they must provide a unique e-mail address for each provider group. When a new provider is created, their e-mail address, which also serves as their username, is validated to avoid the creation of duplicates. If an e-mail address is already associated with a provider in CV, a *"Username already exists"* message displays (Figure 25).

Figure 25: Username Already Exists Error Message



6. Click **Browse** to select the **Provider Group**
7. Click **Browse** to select the **Network(s)** to which the provider belongs from the following options: Health Net, PC3, Provider Agreement, TriWest, or Other
   a. A free-text field labeled **Other Network** opens when **Other** is selected
8. Enter a **Specialty** as needed
9. Enter the provider's **First Name** and **Last Name**
10. Enter the provider's National Provider Identifier (**NPI**) if available
11. Select *Outside Provider* from the **Account Type** dropdown
12. Enter the provider's **E-mail** address and **Phone** number
13. The **User Name** field is automatically populated with the address entered in the **Email** field
14. Either have the system create the CCP's password or manually enter a password

    NOTE: Passwords are case-sensitive and must meet the 6500 security compliance criteria.

    a. Click **Generate,** record the **User Name** and **Password** as displayed, then click **Save**

    -OR-

    b. Manually enter a password that meets 6500 security compliance criteria, then click **Save**
15. Securely provide the CCP with his/her user name and password for CV using VirtuPro or phone
16. When the Provider successfully created message appears, there are two options:
    a. Click **Assign Patients** and follow the steps outlined in Assigning and Unassigning Patients

    -OR-

b. Click **OK** to return to the **CCPM** widget

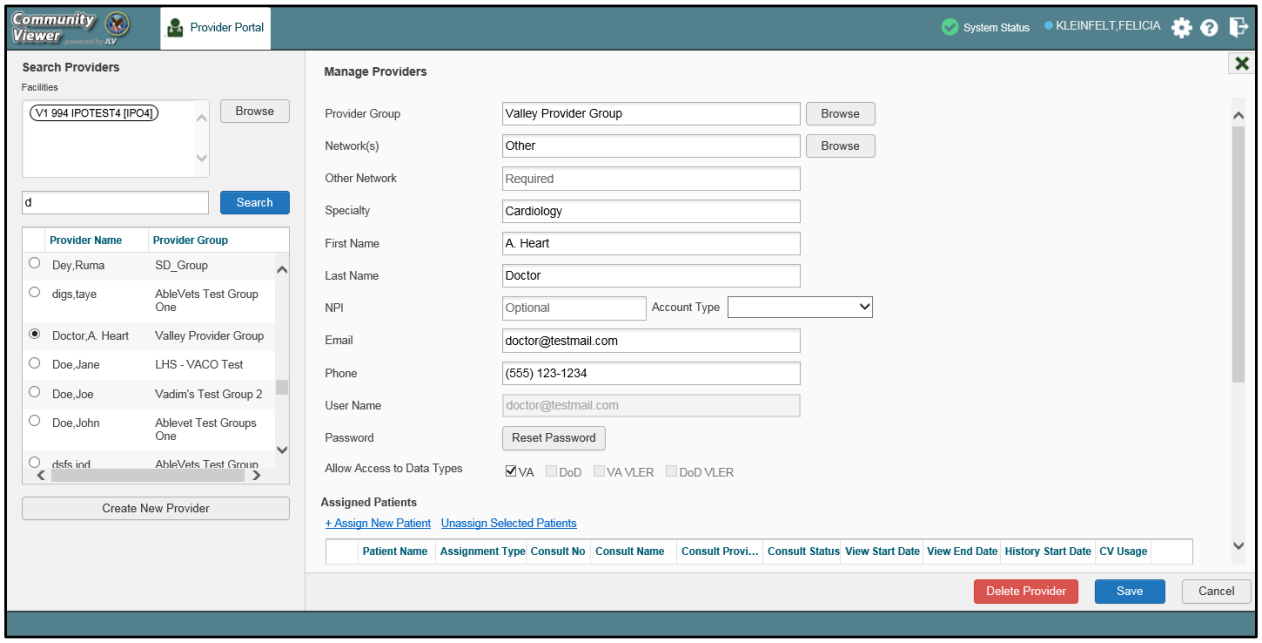
CCPs can now request access to CV from the CCP **Login** page. When a CCP clicks the **New User** link, s/he sees a message directing them to contact their local VA Medical Center for access. They are then given a link to a list of VA points of contact (POCs) from whom they can request access to the application.

3.3.2. Editing Provider Profiles

You can edit a CCP's profile using the **CCPM** widget.

1. Click the **Manage Provider (CCP)/Patient Assignment** link in the **CCPM** widget
2. Enter the provider name in the **Search** field, and click **Search**
3. Select the desired provider from the search results (Figure 26)
4. Edit the provider information in the fields provided, as necessary
5. Click **Save**

Figure 26: Search Providers and Manage Providers Panes



If a provider is assigned to the wrong group, edit the provider group using the **CCPM** widget. See Editing Provider Groups for more information.

If the provider needs to be added to another practice group, users must click **Add New Provider** in the **Search Providers** pane and create the provider within the additional practice group. The provider name can be the same, but a different e-mail address must be used for each unique provider.

3.3.3. Resetting Provider Passwords

If a CCP user has forgotten his/her password, they can click the **Reset Password** link on the **Login** page to open a window that enables the provider to send a password reset link directly to

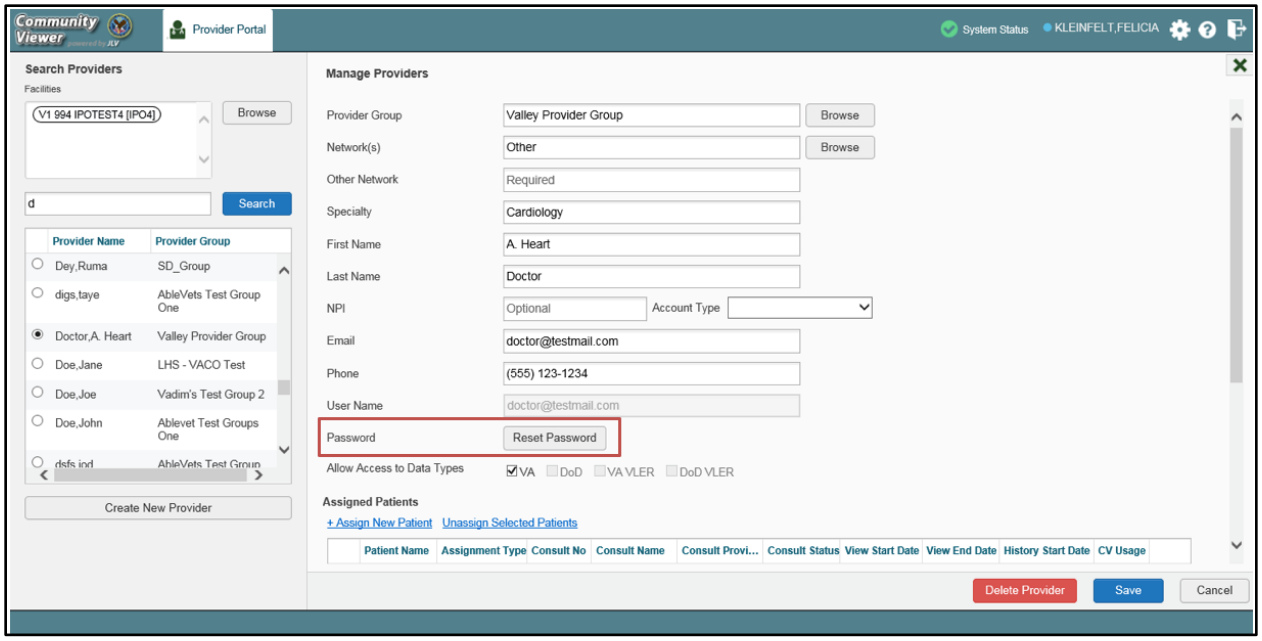
their e-mail address, which they can then use to reset their own password. Password resets can also be performed by VA Staff, using the **CCPM** widget.

1. Click the **Manage Provider (CCP)/Patient Assignment** link in the **CCPM** widget
2. Enter the provider name in the **Search** field
3. Click **Search**
4. Select the desired provider from the search results
5. Click **Reset Password** (highlighted in Figure 27) in the **Manage Providers** pane
   a. Click **Generate** to allow the system to create a new, random password, record the new password, then click **Save**

      -OR-

   b. Manually enter a password that meets 6500 security compliance criteria, then click **Save**
6. Securely provide the CCP with his/her new password for CV using VirtuPro or by phone
7. Click **Save**

Figure 27: CCP Password Reset



3.3.4. Assigning and Unassigning Patients

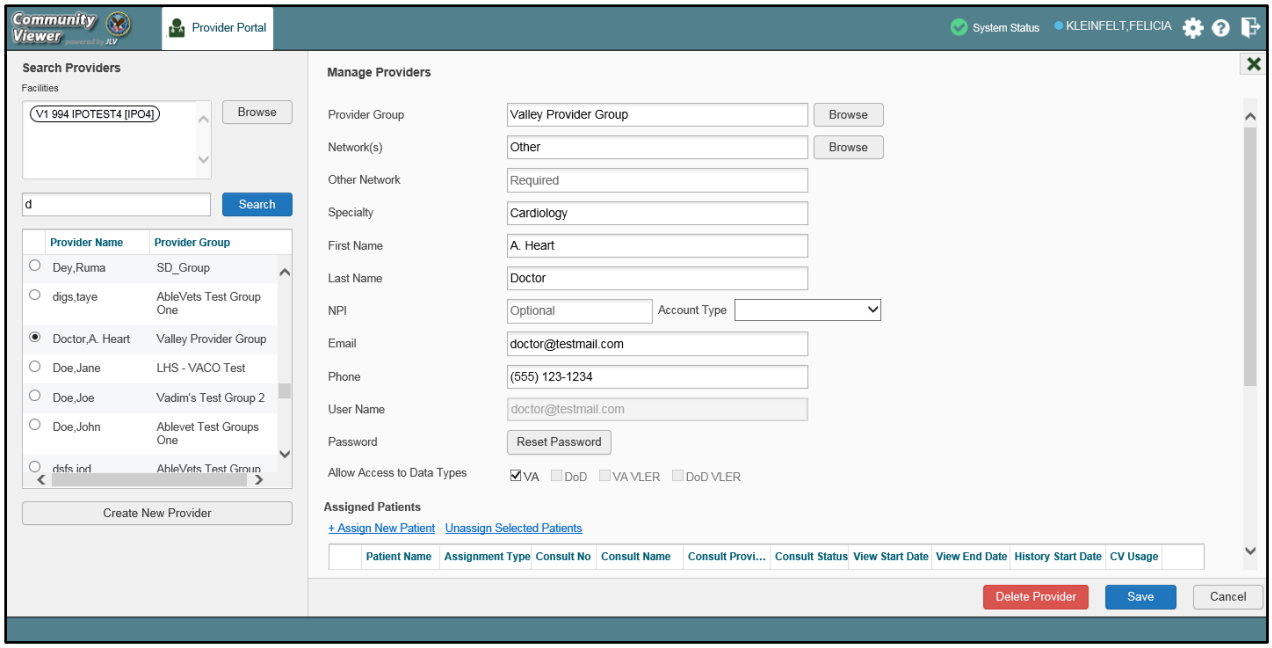
Once the CCP's account has been created, VA Staff can assign them patients. Follow the steps outlined in Creating Provider Accounts.

> **NOTE:** If you chose **Assign Patients** immediately after creating the provider, the **Search** pane is prepopulated with that provider's profile information, and no search is necessary.

1. Click the **Manage Provider (CCP)/Patient Assignment** link in the **CCPM** widget

2. Enter the provider's name in the field to the left of the **Search** button within the **Search Providers** pane (Figure 28)
3. Click **Search**

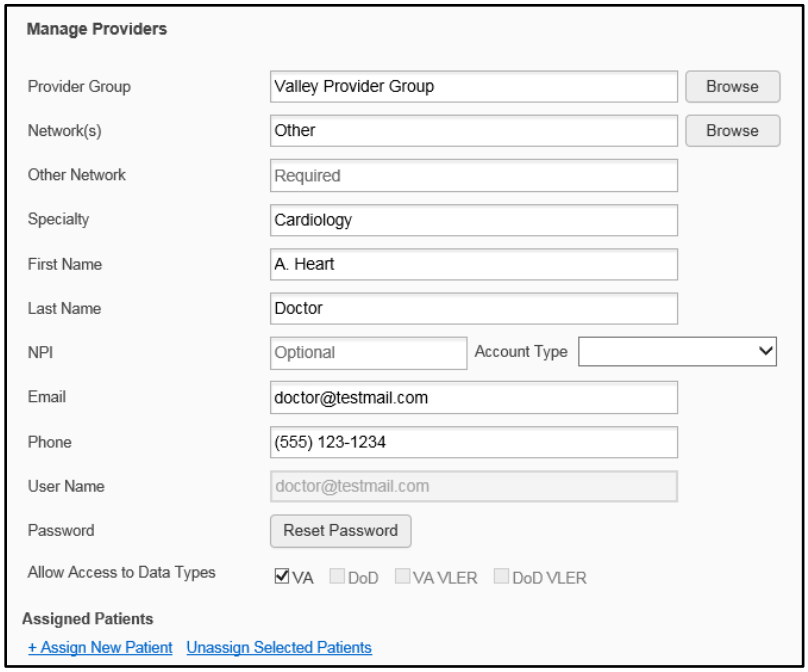
Figure 28: Search Providers Pane



NOTE: The task of deleting a provider is performed by CV Portal Administrators in this release. VA Staff users cannot see the **Delete Provider** button. Instead, they must contact a CV Portal Administrator to request that a provider be deleted.

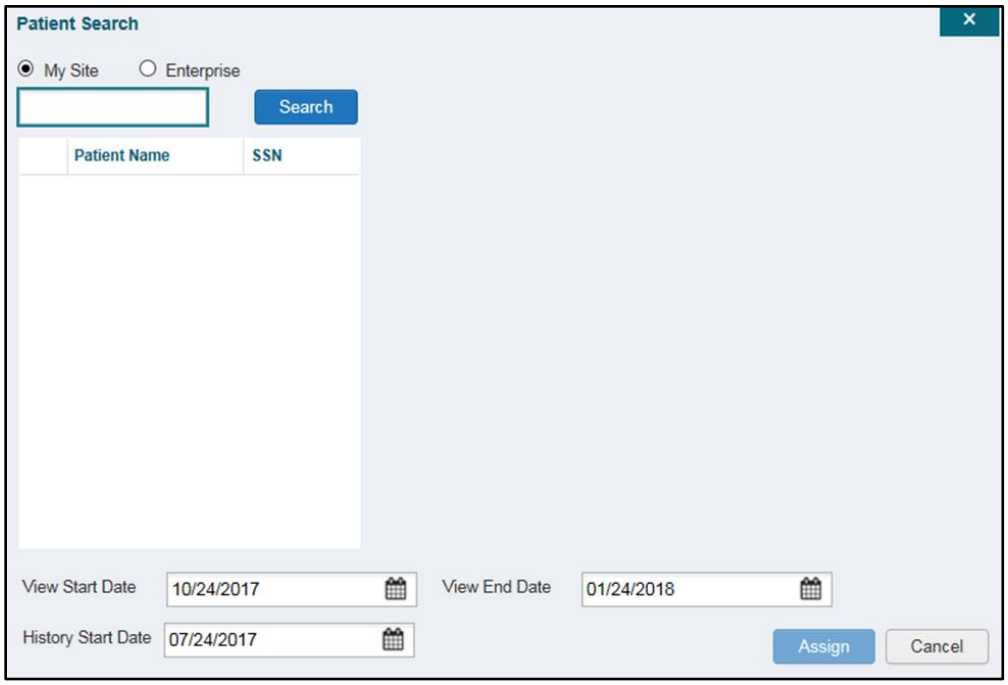
4. Select the provider from the list of results
   a. The **Manage Providers** pane opens with the provider's information
5. Click the **+ Assign New Patient** link (highlighted in Figure 29)
   a. The **Patient Search** dialog opens

Figure 29: Manage Providers Fields Detail



6. Enter the patient name in the blank field at the top of the **Patient Search** dialog (Figure 30)
7. Select the **My Site** or **Enterprise** search option and enter the search criteria (Please refer to Searching Patients for details)

Figure 30: Patient Search Dialog Box



8. Click **Search**

9. Select a patient from the search results list
10. Select the **Assignment Type** from the dropdown: 30 Day Wait, Consult, Distance-Eligible (40 mile), or Episode of Care
    a. If *Consult* is specified, select one consult record from the list for the selected patient; the consult status must be *Active or Scheduled* for the consult to appear in the list
11. If desired, adjust the default **View Start Date**, **View End Date**, and **History Start Date** fields to restrict the data seen by the CCP (See Setting Record Display Limits.)
12. Click **Assign**
13. A notification is generated and sent to the CCP
    a. Review the message and edit as needed
14. Click **Send Email**

CV uses the following rules to manage patient assignments:

- A specific Veteran may be assigned to multiple CCPs
- A Veteran may be assigned to more than one CCP for the following Assignment Types:
  - 30 Day Wait
  - Distance Eligible
  - Episode of Care
- A specific Veteran/consult combination may only be assigned to a single CCP

Table 2: Assignment Rules Examples

Veteran John Davis has multiple active referrals to be assigned:			
Referral 1	30 Day Wait for Dental	Assign to CCP A	A Veteran may have multiple, active assignments for an Assignment Type
Referral 2	30 Day Wait for Podiatry	Assign to CCP B	
Referral 3	30 Day Wait for Podiatry	Assign to CCP C	
Referral 4	Episode of Care for Optometry	Assign to CCP D	
Referral 5	Consult for Cardiology	Assign to CCP E	This specific consult can only be assigned to one CCP at a time
Referral 6	Consult for Chiropractic	Assign to CCP F	This specific consult can only be assigned to one CCP at a time

When it is necessary to unassign patient(s) from a CCP:

1. Repeat steps 1–4 from the **CCPM** widget or select the **Edit** link from the **Manage CCP Groups** pane (Figure 21) to navigate to the **Manage Providers** pane
2. Click the **Unassign Selected Patients** link (highlighted in Figure 29)

3.3.5. Setting Record Display Limits

Users can limit the patient records made available to the assigned CCP. There are two settings that control access to patient data:

- **View Start Date** and **View End Date**: These fields set the length of time the CCP has access to the patient records through CV

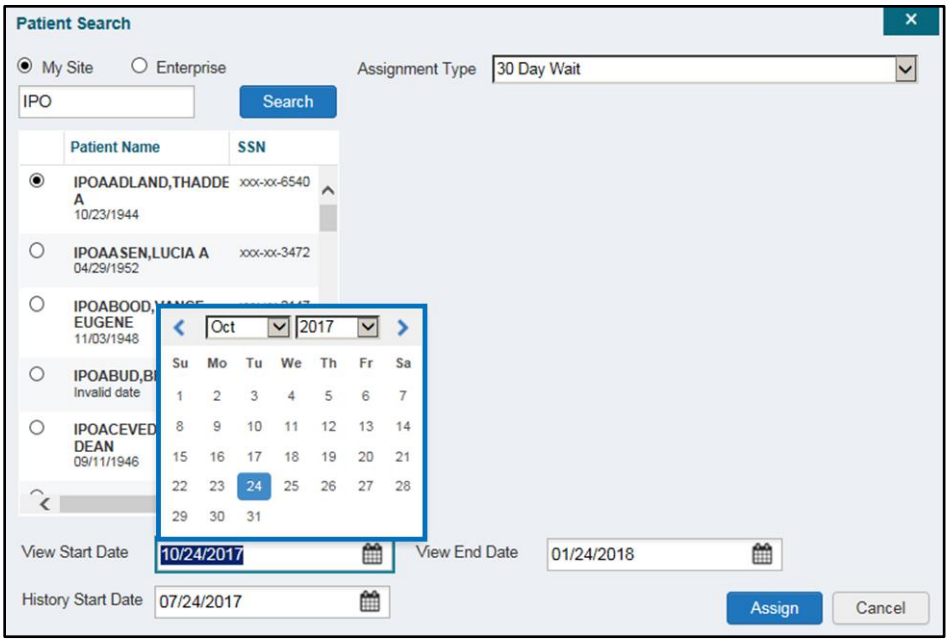
- The default **View Start Date** is the date the patient is assigned to the CCP
- The default **View End Date** is 3 months from the default start date

- **History Start Date:** This setting represents how far back in a patient's VA medical history the CCP is permitted to view
  - If the history start date is set to 01/01/2012, for example, the CCP has access to the patient's records from available VA facilities from 2012 to present

Data access controls are set by the user during the patient assignment process.

1. Click the **Calendar** icon next to the **View Start Date** and the **View End Date** fields
2. Select the start and end dates (Figure 31)
3. Alternatively, click the **Calendar** icon next to the **History Start Date**
4. Select a date
5. Click **Assign**

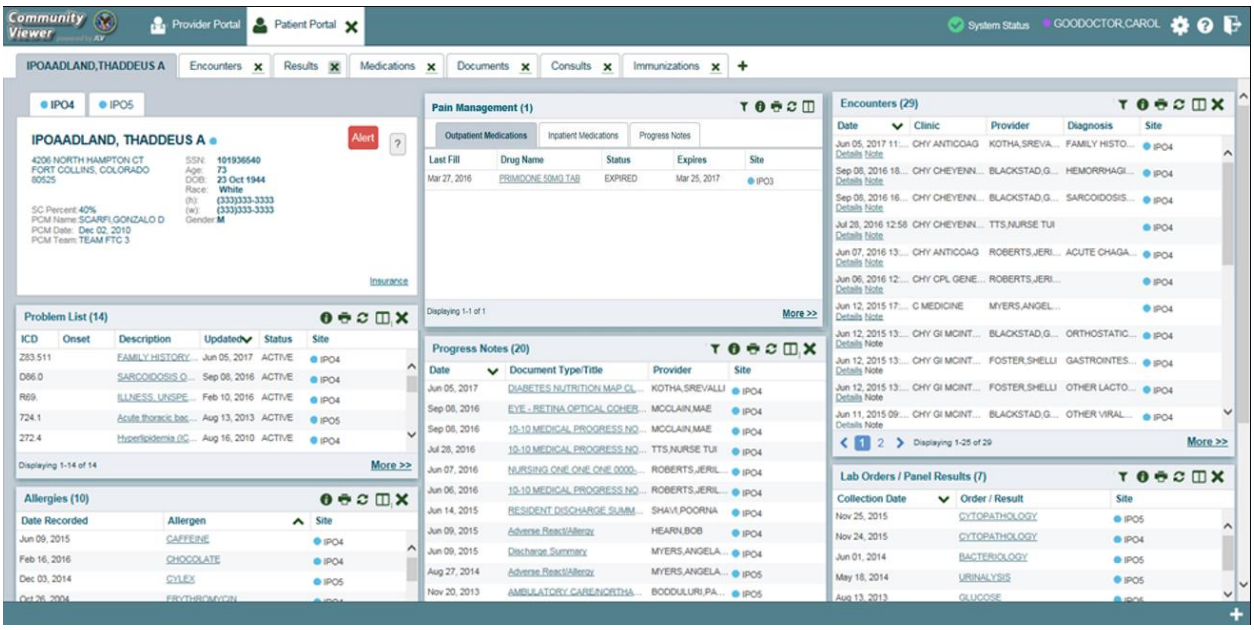
Figure 31: Data Access Controls



4. Widgets: What Community Providers See

Once the CCP has been granted access to CV, they can see their assigned patient's VA health information on the **Patient Portal**. Patient data is presented through widgets (Figure 32), each displaying data specific to an administrative or clinical domain. A summary of the patient's demographics (personal data) appears in the upper left section of the **Patient Portal**. The **Pain Management** widget is a static widget permanently positioned to the right of the **Demographics** widget. The **Demographics** widget and the default instance of the **Pain Management** widget are static widgets that cannot be removed from the **Patient Portal** or moved to a different position. The **Encounter**, **Results**, **Medications**, **Documents**, **Consults**, and **Immunization** tabs provide unique widget layouts.

Figure 32: Widget Display on the Patient Portal



***Primary Care Management (PCM)*

All widgets available for display on the Patient Portal are housed in a horizontal tray at the bottom of the page, the **Widget Tray**. When customizing their view of CV, CCPs click the + icon in the lower right corner of the page (Figure 32) to open the **Widget Tray**.

The widgets that are available for display on the Patient Portal are:

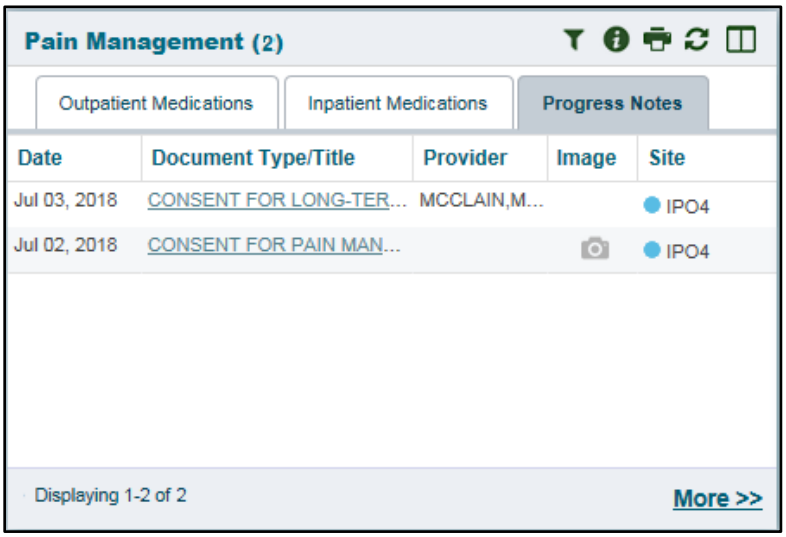
- Patient Demographics
- Admissions
- Allergies
- Appointments
- Clinical Reminders
- Consults
- Discharge/Essentris Notes
- Encounters
- Lab Panel Results
- Lab Results
- Outpatient Medications
- Orders
- Pain Management
- Problem List
- Procedures
- Progress Notes

- Immunizations
- Inpatient Medications
- Radiology Exams
- Vitals

4.1. Nondiagnostic Images

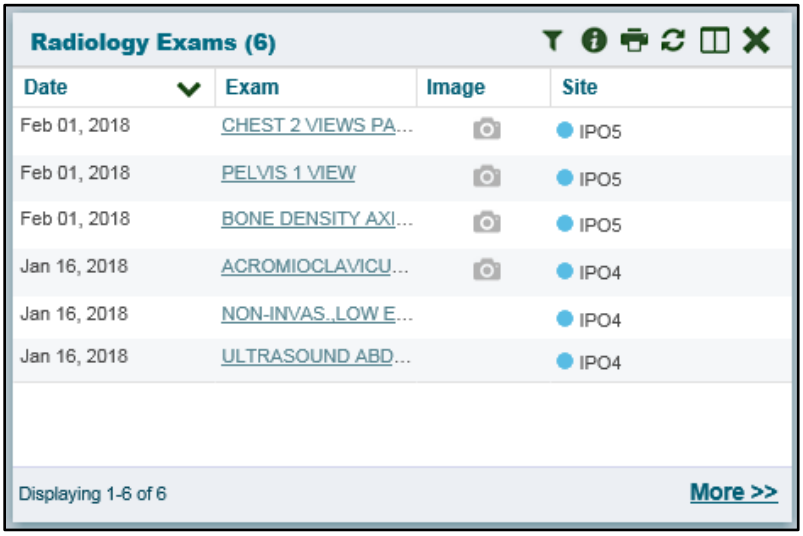
Nondiagnostic images are available in JPEG and PDF format from the **Encounters**, **Progress Notes**, and **Radiology Exams** widgets, in addition to the **Progress Notes** tab of the **Pain Management** widget (Figure 33).

Figure 33: Pain Management Widget (Minimized View)–Nondiagnostic Images



A **Camera** icon in the **Image** column of a widget in minimized view indicates one or more images are associated with that record (Figure 34). Clicking the **Camera** icon in a supported widget opens the list of images associated with the record. See Figure 36 and Figure 37.

Figure 34: Radiology Exams Widget (Minimized View)–Nondiagnostic Images



Clicking the **Click Image to Open Viewer** link in the **Detail** view (Figure 35) of a widget opens the list of images associated with that record.

Figure 35: Radiology Exams Detail–Nondiagnostic Images

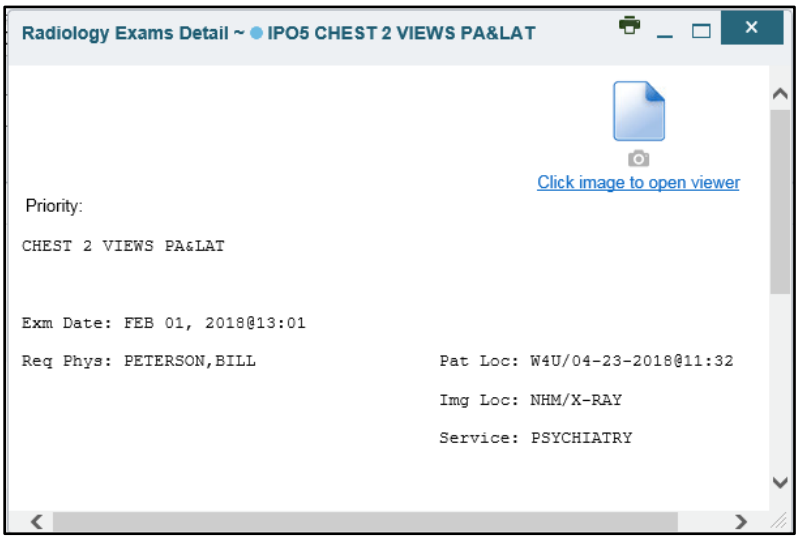


Figure 36: Single Encounter Nondiagnostic Image

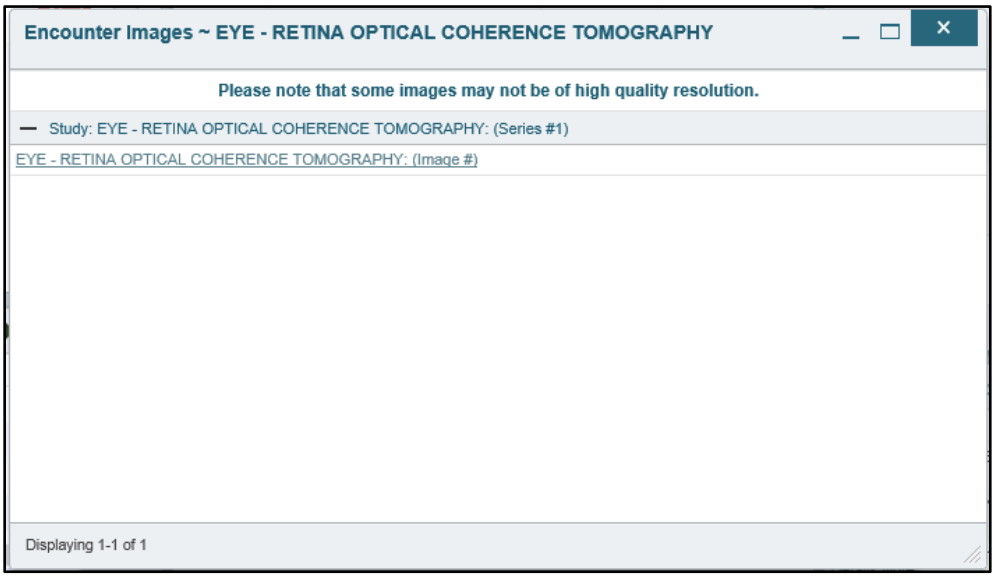
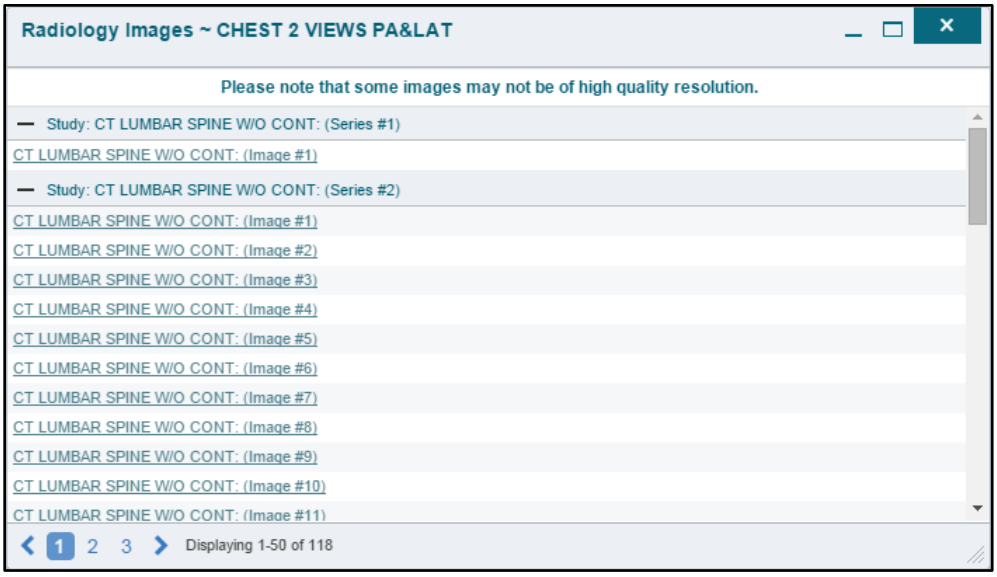
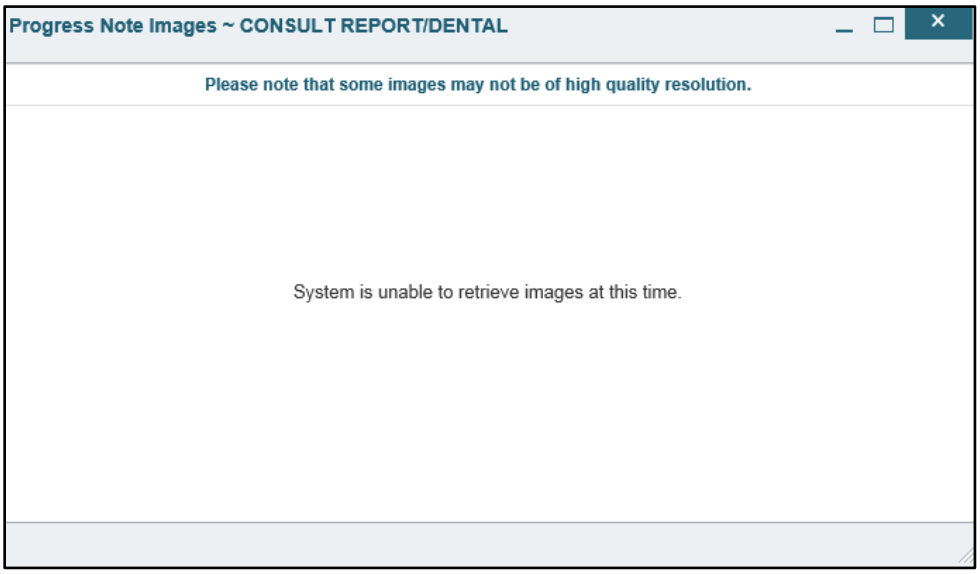


Figure 37: Multiple Radiology Nondiagnostic Images



If an image is temporarily unavailable, users see a *"System is unable to retrieve images at this time"* message (Figure 38).

Figure 38: Progress Note Images–Unable to Retrieve Images Error



5. Troubleshooting

5.1. Login Page Errors

Access to CV is limited to registered, authorized users. CV validates user access against information retrieved from your smart card. If you are experiencing trouble logging in to CV, please review Table 3 before contacting the ESD.

Table 3: Login Page Error Message Troubleshooting

Error Message	Resolution Steps
Access denied. You are not an authorized user.	***WHY?*** There is a PIV card processing problem; the wrong security or an invalid security certificate was selected; or you are not an authorized user. ***FIX IT:*** 1) Close the browser window 2) Reinsert your PIV card and relaunch CV 3) Select a certificate that is not expired and specifies: "*Issued by: Veterans Affairs CA B1*" 4) If this is unsuccessful, contact the ESD
Could not save User Profile	***WHY?*** The error occurred during PIV authentication for VA users. It is typically a PIV card processing problem, or the wrong security certificate was chosen. ***FIX IT:*** 1) Close your browser window 2) Reinsert your PIV card and relaunch CV 3) Select a certificate that is not expired and specifies: "*Issued by: Veterans Affairs CA B1*" 4) If this is unsuccessful, close all open IE windows/tabs, then open IE and try CV again
Not a valid ACCESS/VERIFY CODE pair	***WHY?*** 1) CV could not match your Access and Verify codes to the Site selected in the dropdown or VA; or 2) A username and password were entered instead of Access/Verify codes. ***FIX IT:*** 1) Veterans Health Administration (VHA) users must select the **parent VistA host site** for their facility 2) Reenter your **Access** and **Verify** codes (Computerized Patient Record System (CPRS) or VistA codes for VHA users)
Page cannot be displayed	***WHY?*** The CV URL requires certain IE settings. ***FIX IT:*** 1) Click the **Tools** menu (press ALT-X) in IE 2) Select **Internet Options** 3) When the dialog opens, select the **Advanced** tab 4) Scroll down in the list until you see the Secure Socket Layer (SSL) 2.0 setting, and ensure it is NOT checked 5) Ensure that Transport Layer Security (TLS) 1.0, 1.1, and 1.2 ARE checked 6) Click **OK** to close the dialog box, then relaunch CV (The page should load)

Error Message	Resolution Steps
Smart Card required	***WHY?*** Your Smart Card was not read by Windows Security and CV before opening the CV URL. ***FIX IT:*** 1) Close all browser sessions/browser-based applications 2) Reinsert PIV card and relaunch CV 3) If this is unsuccessful, fully reboot your system to refresh all connections (This resolves greater than 95% of any remaining problems.)
VERIFY CODE must be changed before continued use	***WHY?*** Your CPRS VERIFY CODE has expired. ***FIX IT:*** 1) Open CPRS or VistA a) If prompted for a PIV card certificate by CPRS, click **Cancel** 2) Select the **Change Verify Code** checkbox on the sign-on dialog before clicking **OK** 3) You are prompted to create a new Verify code 4) Once your Verify code is changed for CPRS, CV recognizes the new code immediately

5.1.1. Patient Search Errors

The following error messages may appear when you are searching for a patient in the **CCPM** widget. If you are experiencing errors while searching for patients, please review Table 4 before contacting the ESD.

Table 4: Patient Search Error Messages and Resolution Steps

Error Message	Resolution Steps
An invalid search criteria was entered. Please enter at least 2 characters.	***WHY?*** You entered an invalid patient name. ***FIX IT:*** Please try your search again. When searching by patient name, enter at least two characters of the patient's first and last name. Search results display the closest match to the characters entered in the format of [last name], [first name].
An invalid SSN format was entered. Please enter a 9-digit SSN.	***WHY?*** You entered an invalid SSN. ***FIX IT:*** Please try your search again. When searching by patient SSN, you are required to enter the patient's full 9-digit SSN. Dashes are allowed (e.g., 123-45-6789).
An invalid last 5 format was entered. Please enter the first letter of the last name followed by the last 4-digits of the SSN.	***WHY?*** You entered an invalid patient name or SSN. ***FIX IT:*** Please try your search again. Patient search allows you to search for a patient using the first initial of the patient's last name and the last four digits of the patient's SSN. Please try your search again using the first initial of the patient's last name and the last four digits of the patient's SSN.
An error occurred during your search. Please try your search again.	***WHY?*** This error may display when invalid patient identifiers were entered, or an error occurred at the service layer or with an external system. ***FIX IT:*** Please try your search again.

6. Acronyms and Abbreviations

Table 5 lists the acronyms and abbreviations used throughout this document and their descriptions.

Table 5: Acronyms and Abbreviations

Acronym	Description
CCP	Community Care Provider
CCPM	Community Care Provider Management
CPRS	Computerized Patient Record System
CV	Community Viewer
ESD	Enterprise Service Desk
GUI	Graphical User Interface
ID	Identification
IE	Internet Explorer
MVI	Master Veteran Index
OIT	Office of Information and Technology
PCM	Primary Care Management
PIN	Personal Identification Number
PIV	Personal Identification Verification
SSL	Secure Socket Layer
SSN	Social Security Number
TLS	Transport Layer Security
UI	User Interface
URL	Uniform Resource Locator
VA	Department of Veterans Affairs
VDS	VistA Data Service
VHA	Veterans Health Administration
VISN	Veterans Integrated Service Network
VistA	Veterans Health Information Systems and Technology Architecture