Community Viewer (CV) Version 3.1

Risk Management VA Staff User Guide

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Version 1.2

Department of Veterans Affairs (VA)

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Revision History

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1. Introduction

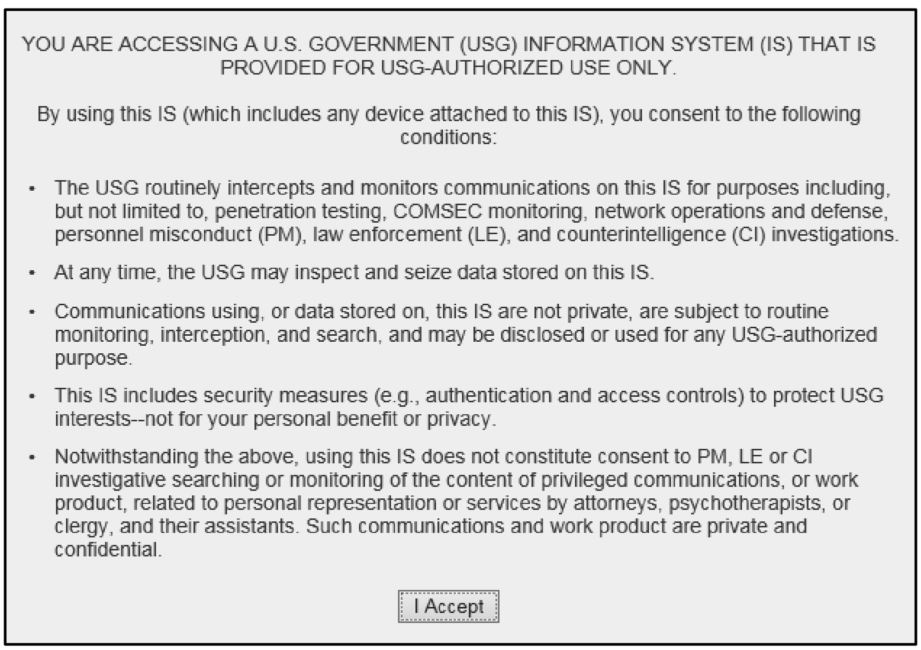
Community Viewer (CV) is a browser-based software application that facilitates the secure exchange of data between Department of Veterans Affairs (VA) systems and Risk Management Providers (RMPs). The exchange of data improves the coordination and quality of care for VA patients by allowing for quality assurance reviews to be performed outside of the VA network.

CV pulls information from VA health care systems in real time for viewing within a web browser. Risk Management (RM) VA Staff assign patients to RMPs through CV, allowing them access to view consolidated patient data from multiple Veterans Information Systems and Technology Architecture (VistA) systems.

This User Guide is intended for RM VA Staff who use the functionality within the **Risk Management Provider Management (RMPM)** widget of CV to view profile information and manage patient assignments for RMPs.

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

Figure 1: CV Authorized Use Only Warning



RM VA Staff use the **RMPM** widget to perform the following tasks for RMPs:

- Create, edit, and delete individual RMP profiles
- Create, edit, and delete RM community care provider groups
- Assign/unassign patients
- Search patient assignments
- Manage access to patient data
- Perform My Site and Enterprise patient searches

- Generate or reset passwords
- Generate system reports

1.1. Purpose of the Guide

The purpose of this user guide is to familiarize RM VA Staff with the important features and navigational elements of CV. This guide indicates when specific features are restricted to specific user groups.

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 RM 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 (also referred to as a Smart Card), and the VistA Access/Verify codes required to launch CV

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: Mobile devices are not supported in this release.

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

- Internet Explorer (IE) v11
- Chrome v76
- Microsoft Edge v44
- 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/va

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 CV functionality, please read the Sensitive Information warning in Figure 1.

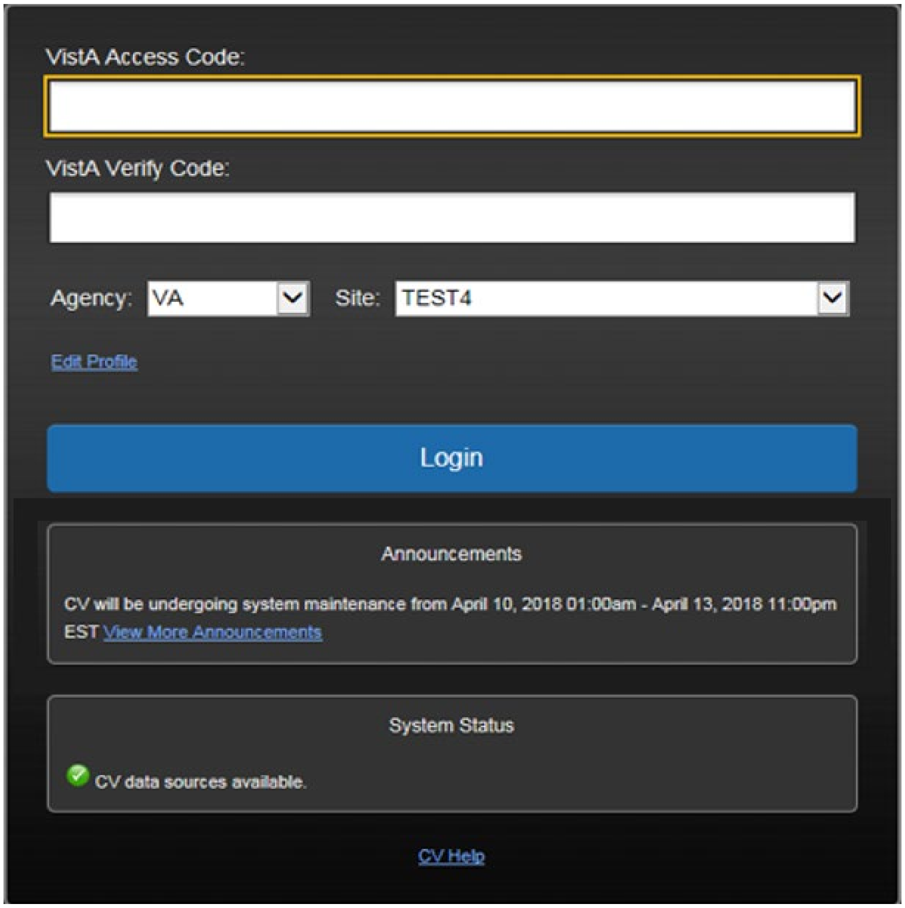
CV authenticates all VA users using their PIV card (also known as a Smart Card) and their VistA Access and Verify codes. During log in, first-time CV users are prompted to enter their agency, site, and user settings. This data is used to create a CV user profile, and it is utilized during future login 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 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 System Status and Viewing Announcements for detailed information.

8. Click **Login**

Figure 2: Login Page



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 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** (Figure 3)

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 3: System Status Indicator

2.1.2. Viewing Announcements

System announcements are provided by VA and displayed on the **Login** page (Figure 2) 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

You can customize your 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 4).

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

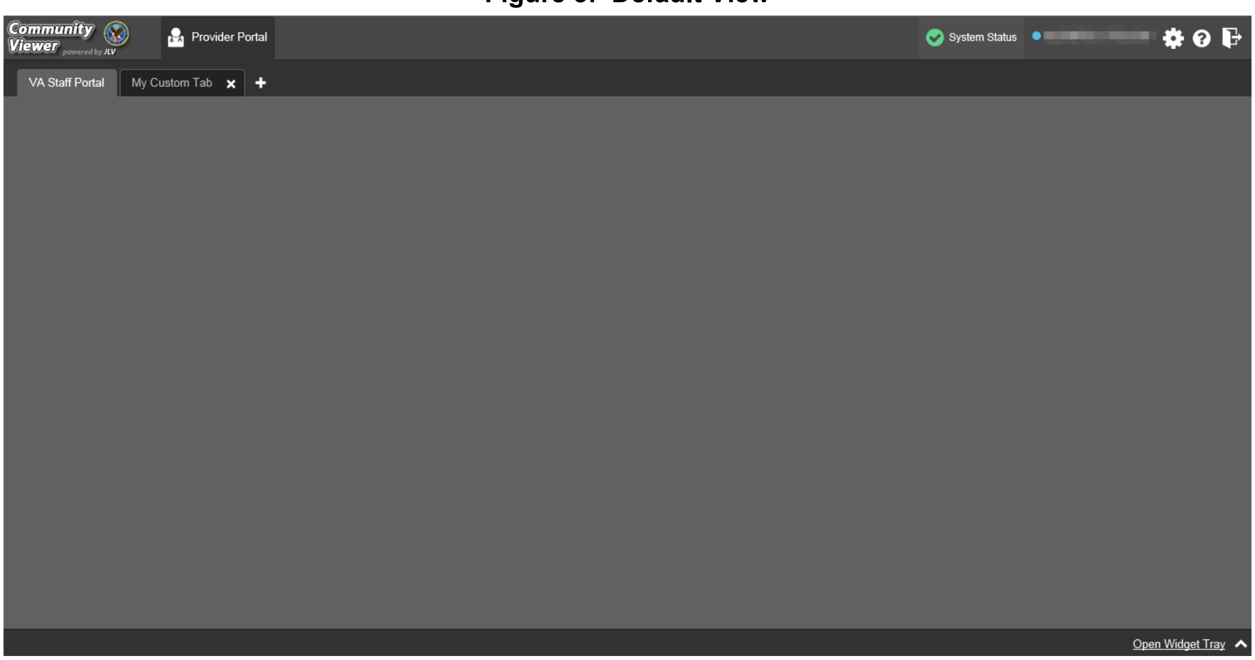
Figure 4: CV Portal Tools

2.3.1. Default View

After logging in to CV, the **VA Staff Portal** opens, displaying the **VA Staff Portal** tab. The default view of the **VA Staff Portal** is blank. The **RMPM** widget is not open by default. You must launch it from the **Widget Tray**.

Click the **Open Widget Tray** link in the lower right corner of the portal (Figure 5) to open the **Widget Tray**. Click, hold, and drag the icon from the **Widget Tray** to the portal, and drop the widget in the desired location. Your widget configurations are saved to your profile and used each time you log in to CV.

Figure 5: Default View



2.3.2. Profile Settings

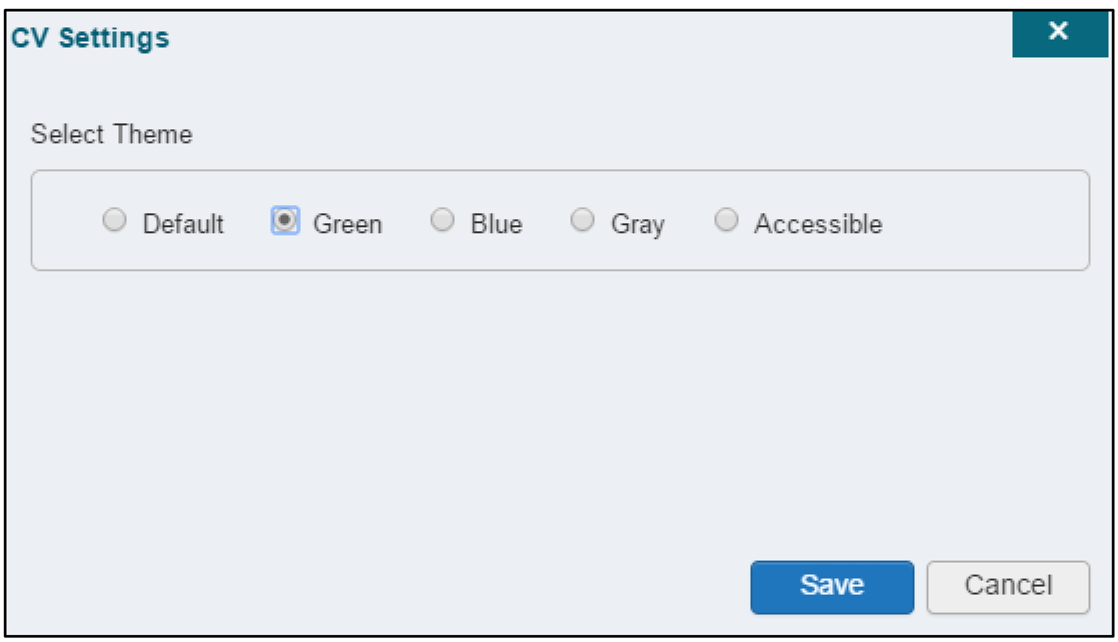
Profile settings are accessible within CV by clicking the **Settings** icon, located in the upper right corner of the portal pages (Figure 5).

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 CV. 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 11) is 508-compliant, and it is designed to work with the accessibility tools installed on your device.

1. Click the **Settings** icon
   a. The **CV Settings** dialog opens (Figure 6)
2. Click the radio button next to the desired theme
3. Click **Save** to apply the selected theme -OR-
4. 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.

Figure 7: Default Theme

Figure 8: Blue UI Theme

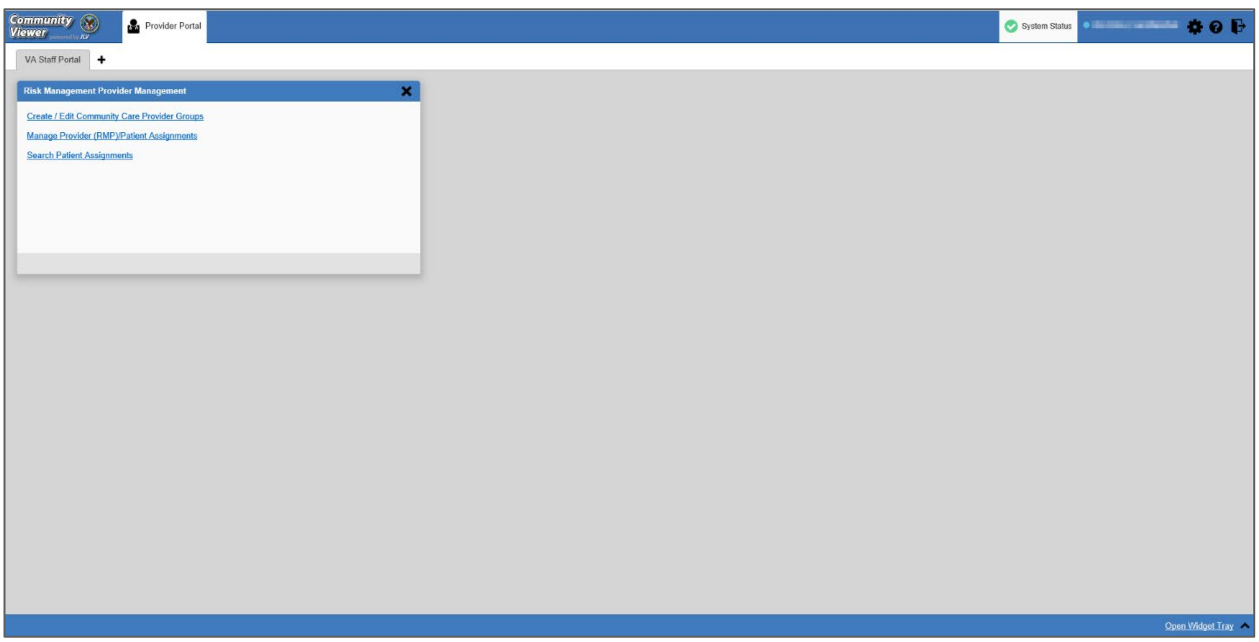


Figure 9: Gray UI Theme

Figure 10: Green UI Theme

Figure 11: Accessible (508-Compliant) UI Theme

2.3.3. 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.

2.3.3.1. Keyboard Focus and Portal Navigation

Keyboard focus is the highlighting of portal elements that enables interaction with, and the navigation of, the web application through the keyboard and keystrokes. The portal element in focus is outlined in gold (Figure 11) 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 application components are accessible via the keyboard when the Accessible theme is in use.

> **NOTE:** If you focus on an element within the widget that has hover text, the text appears after a small delay as if the user hovered over the element with a mouse cursor.

Pressing **Enter** or the **Spacebar** when an element that provides action is in keyboard focus performs the associated action. For example, pressing **Enter** or the **Spacebar** when the **Settings** icon is in focus, voiced “List box button, Settings,” 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 portal 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 portal 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 panes to toggle keyboard focus between the main or top element on left and right panes.
ENTER	Press to transfer keyboard focus to the highlighted widget. Press to activate an element in focus.
TAB	Press to transfer keyboard focus to other UI items.
ESC	Press to return keyboard focus to the pane containing the UI item with keyboard focus or to exit a window or widget.
SPACEBAR	Press to activate an element in focus.
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.
TAB	Press one or more times when focus is on a portal tab to place **Add Tab** (**+**) in keyboard focus. Add a Tab: 1) Press **Tab** 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. 4) Tab to the **Add** button to confirm the new tab name or tab to the **Cancel** button to discard the new tab.
ENTER	Press while the portal tab (**+**) is in focus, voiced as "Add Tab button," to add a new portal tab.
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	
Enter	Press while the widget tray **Open Widget Tray** link is in focus to add a widget.
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.

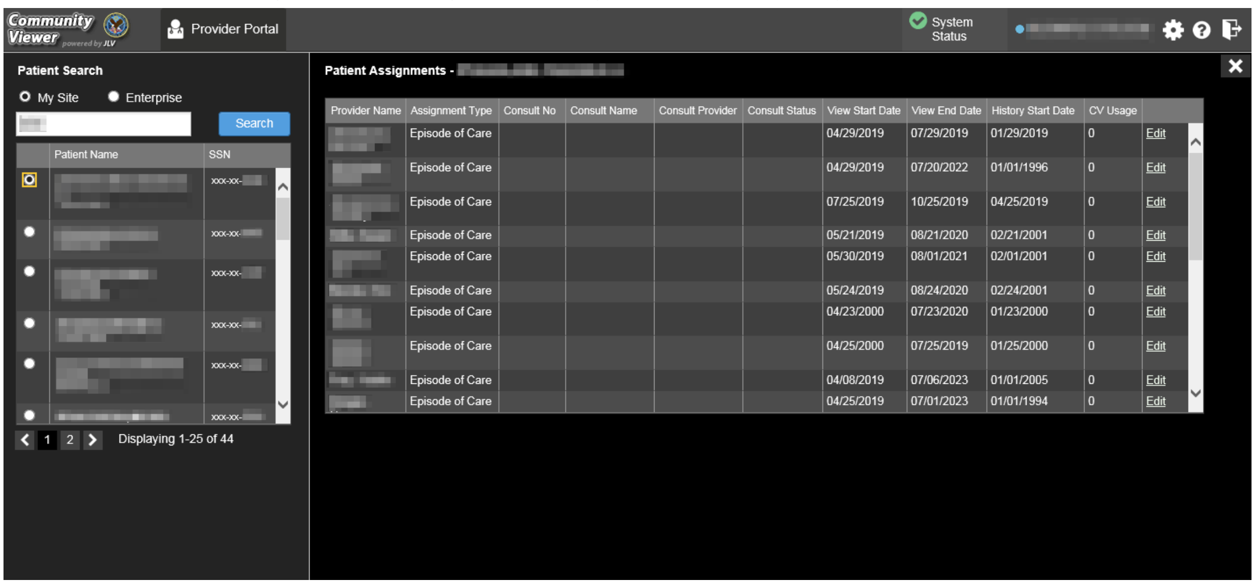
2.3.3.2. Accessible Theme Portal Navigation

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

[Figure 12](#) depicts the **Patient Assignments** pane of the **RMPM** widget.

- Focus can be changed by pressing **Tab** key
  - Pressing the **Tab** key in this example shifts the keyboard focus from the **My Site** radio button to the **Patient Search** field
- Typing at least two characters in the **Patient Search** field and pressing **Enter**, with focus either in the search field or on the **Search** button, initiates a search
- Press **Tab** to navigate through the results
  - **Tab** once to focus first on the entire row of the patient result, then **Tab** again to put focus on the radio button associated with that record
- Press **Spacebar** with a radio button in focus to select a patient from the results
  - If you have a radio button selected, press the **arrow** keys up or down to navigate through the radio buttons for each patient result
  - If you have no radio buttons selected, **Shift** + **Tab** to navigate back up through the result rows
- Use **Alt + 5** on to toggle between the **Patient Search** and **Patient Assignments** panes.

Figure 12: Navigation Using Elements 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 you attempt any new activity.

3. Using CV

3.1. The Widget Tray

The **Provider Portal** contains the **VA Staff Portal** tab, which holds the **RMPM** widget.

You can launch the **RMPM** widget from the **Widget Tray** if it is not immediately displayed when you log in (Figure 13).

Click the **Open Widget Tray** link in the lower right corner of the portal to open the **Widget Tray** (the widget tray and **Open Widget Tray** link are highlighted in Figure 13). Click, hold, and drag the icon from the **Widget Tray** to the portal page, and drop the widget in the desired location.

Figure 13: Widget Tray

3.2. About the RMPM Widget

The **RMPM** widget within the **VA Staff Portal** (Figure 14) is the starting point for multiple tasks, including creating, editing, and deleting individual provider and provider group profiles, setting limits on an RM provider's access to a patients VA medical record, and generating or resetting RM provider passwords.

The following tasks (links) are available:

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

Figure 14: The RMPM Widget

3.3. About RMP Accounts

All RMP accounts are created in the **RMPM** widget. When an RMP account is created, so is their user profile.

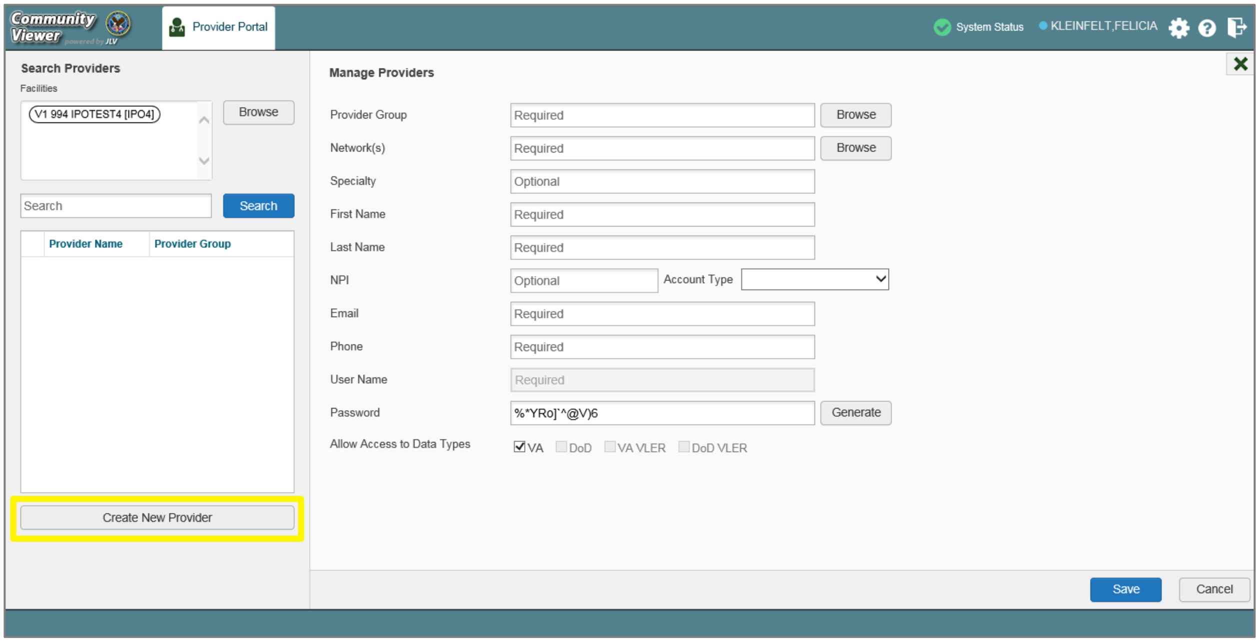
RMPs can request access to CV via the **Login** page. When an RMP clicks the **New User** link, a message directs them to contact their local VA Medical Center for access. They are then given a link to a list of VA Points of Contact (POCs) from whom they can request CV access.

3.3.1. Creating RMP Accounts

RMP accounts are created via the RMPM widget. RM VA Staff can assign patients to an RMP once their account has been created.

1. Click the **Manage Provider (RMP)/Patient Assignment** link in the **RMPM** widget (Figure 14)
2. Click **Create New Provider** in the **Search Providers** pane (Figure 15)
    a. The **Create/Edit Provider** pane opens
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**

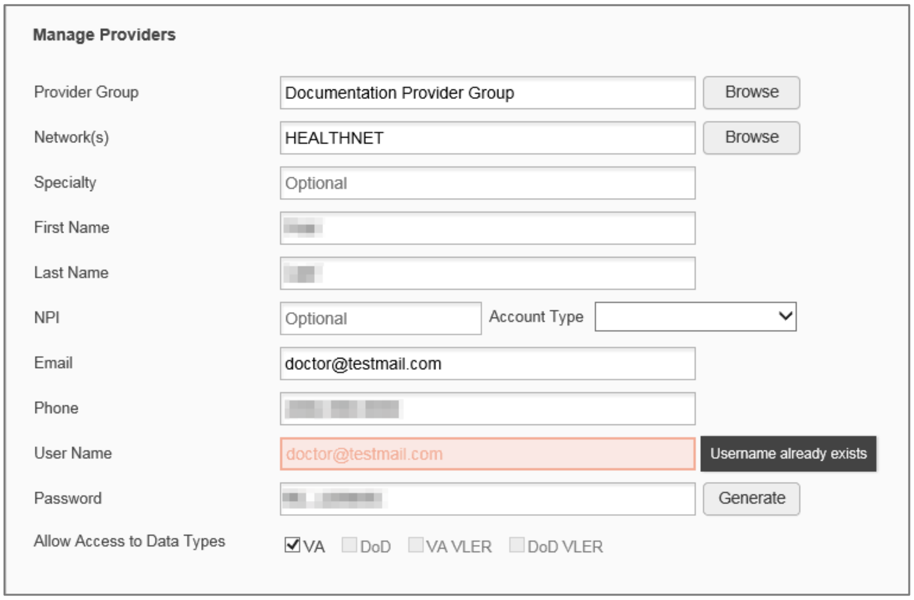
Figure 15: Search Providers and Manage Providers Panes



5. Enter the provider information in each of the required fields on the **Manage Providers** pane ([Figure 15](#))

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. When a new provider is created, their e-mail address 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 16](#)).

Figure 16: Username Already Exists Error Message



6. 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
7. Enter a **Specialty** as needed
8. Enter the provider’s **First Name** and **Last Name**
9. Enter the provider’s National Provider Identifier (**NPI**), if available
10. Select "*Outside Provider*" from the **Account Type** dropdown
11. Enter the provider’s **E-mail** address and **Phone** number
    a. The **User Name** field automatically populates with the address entered in the **Email** field
12. Retain the automatically generated initial password **-OR-**
13. Click **Generate** to allow the system to create a new, random password **-OR-**
14. Manually enter a password that meets VA Directive 6500 security compliance criteria

NOTE: Passwords are case-sensitive and must enforce the requirements outlined in VA Handbook 6500.

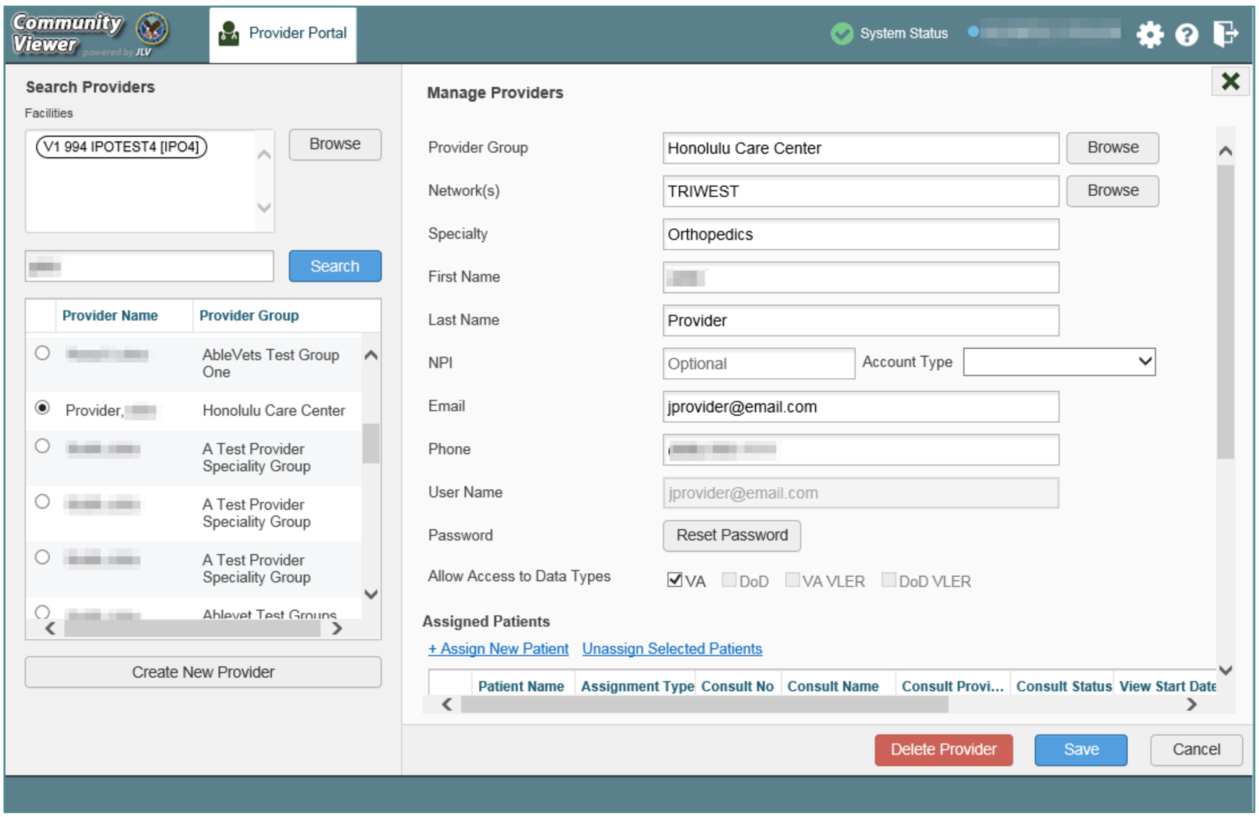
15. Click **Save**
16. Securely provide the RMP with his/her password for CV
17. When the “*Provider successfully created*” message appears, there are two options:
    a. Click **Assign Patients** and follow the steps outlined in Creating Patient Assignments
    -OR-
    b. Click **OK** to return to the **RMPM** widget

3.3.2. Editing RMP Profiles

You can edit an RMP's profile using the **RMPM** widget.

1. Click the **Manage Provider (RMP)/Patient Assignment** link in the **RMPM** widget
2. Enter the provider name in the **Search** field, and click **Search**
3. Select the desired provider from the search results (Figure 17)
4. Edit the provider information in the fields provided reset the RMP's password, and assign or unassign patients, as necessary
5. Click **Save**

Figure 17: Search Providers and Manage Providers Panes



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

Providers can be added to more than one provider group. Click **Create New Provider** in the **Search Providers** pane to add the provider to another provider group.

NOTE: Providers must have a unique e-mail address associated with their name in each provider group to which they belong.

3.3.3. Deleting RMP Accounts

Deleting an RMP from the system disables their account and prevents access to CV. You may only delete an RMP when there are no patient assignments. See Removing Patient Assignments for more information.

1. Open the **RMPM** widget
2. Click the **Manage Provider (RMP)/Patient Assignment** link
3. Enter the search criteria in the fields provided in the **Search Providers** pane
4. Click **Search**
5. Select the provider from the results list
6. Click the **Delete Provider** button
    a. Scroll to the bottom half of the **Manage Providers** pane, if needed, to see the **Delete Provider** button

Once deleted, the RMP account cannot be restored. The account would need to be re-created to reinstate RMP access. See Creating RMP Accounts for more information.

3.4. About Provider Groups and Facilities

Before RM VA Staff can assign a patient to an RMP, they must be assigned to a provider group. RM VA Staff can create, edit, and delete provider groups and individual provider accounts.

> **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. One works with a family practice called Evergreen Health Care. Dr. One is the *Provider* in this example, and Evergreen Health Care is the *Provider Group* to which Dr. One is assigned.

EXAMPLE 2: Dr. Two, 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.

3.4.1. Creating Provider Groups

When an RMP's account is created, VA Staff can associate the RMP with a provider group within their profile. An RMP must belong to a Provider Group before assigning them a VA patient.

1. Open the **RMPM** widget
2. Click the **Create/Edit Community Care Provider Groups** link
3. Click the **Create New Provider Group** button
4. Click **Browse** to the right of the **Facilities** field and type the name of the facility

> **NOTE:** As you type a facility name in the field, CV automatically fills in facilities matching the entered characters in a dropdown list.

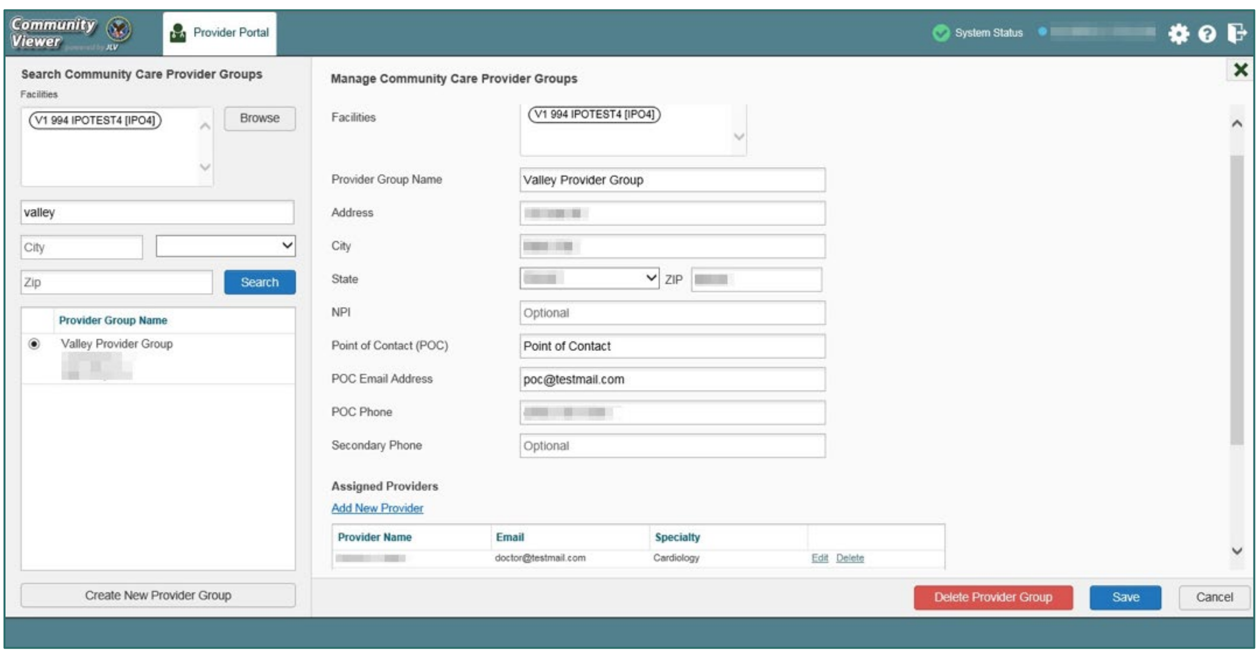
5. Select one or more facilities from the resulting list and click **OK** from the **Browse Facilities** dialog box
6. Enter information for the provider group in the remaining fields
7. Click **Save**
8. When the *Provider Group successfully created* message appears, you are given the following options:
   a. Click **Create Providers** and follow the steps outlined in Creating RMP Accounts
   b. Click **OK**

3.4.2. Editing Provider Groups

You can edit provider groups using the **RMPM** widget (Figure 14).

1. Click the **Create/Edit Community Care Provider Groups** link
2. Enter the facility, provider group name, city and state, or zip code in the **Search** fields (Figure 18)
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 18: Search and Manage Community Care Provider Groups Panes



7. Click the **Add New Provider** link to add a new provider to the group in the **Manage Providers** pane
   a. Click the **Save** button

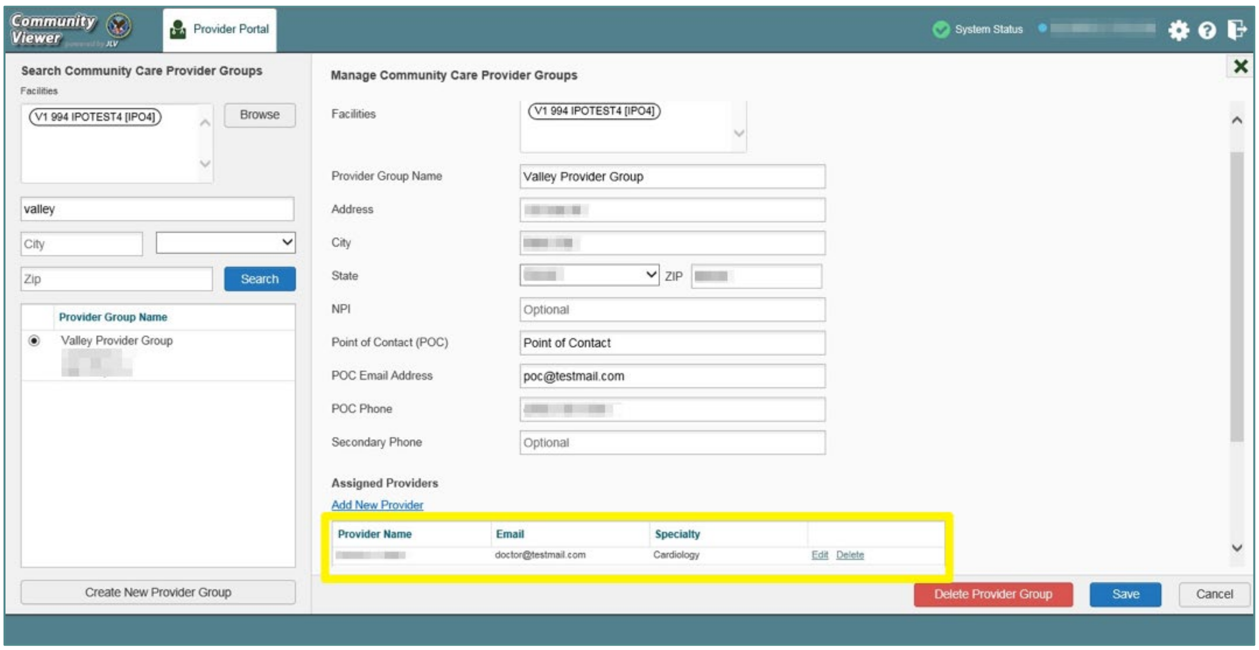
i. Click the **Create Another Provider** button to return to a new **Manage Providers** pane to add another provider **- OR-**

ii. Click the **Assign Patients** button to return to the same **Manage Providers** pane to add patients **- OR-**

iii. Click the **OK** button to return to the **Manage Community Care Provider Groups** pane

8. Providers assigned to the provider group are listed in the **Assigned Providers** table of the **Manage Community Care Provider Groups** pane
   a. Edit provider profiles or remove providers from the group using the **Edit** link within the **Assigned Providers** list (Figure 19)
9. Click **Save**

Figure 19: Assigned Providers Edit and Delete Links

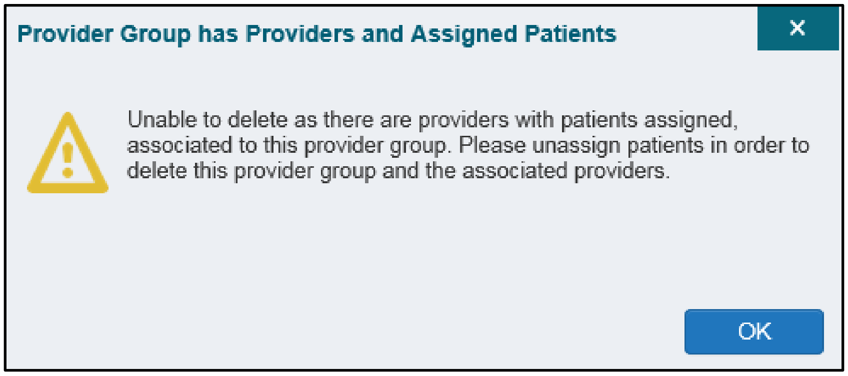


3.4.3. Deleting a Provider Group

You 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 20 displays. Assigning and Unassigning Patients details steps to unassign patients from an individual provider.

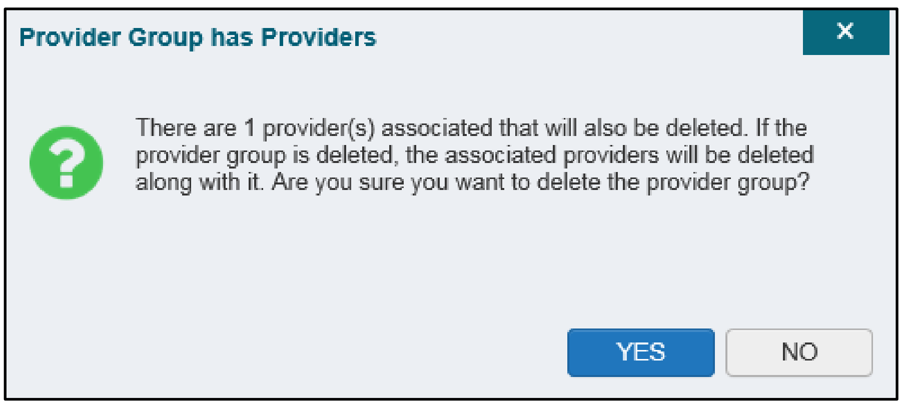
1. Click the **Create/Edit Community Care Provider Groups** link
2. Enter the facility, provider group name, city and state, or zip code in the **Search** field
3. Click **Search**
4. Select the desired provider group from the search results
5. Select the red **Delete Provider Group** button (Figure 19)

Figure 20: Provider Group Deletion Error Message



You can delete providers along with their associated provider group if they do not have assigned patients. If the provider group has associated providers that you intend to also delete, select the **Yes** button when prompted (Figure 21).

Figure 21: Provider Group Has Providers Without Patient Assignments



3.5. About Search

The **RMPM** widget's search features are used to find a provider group, a provider, or a patient.

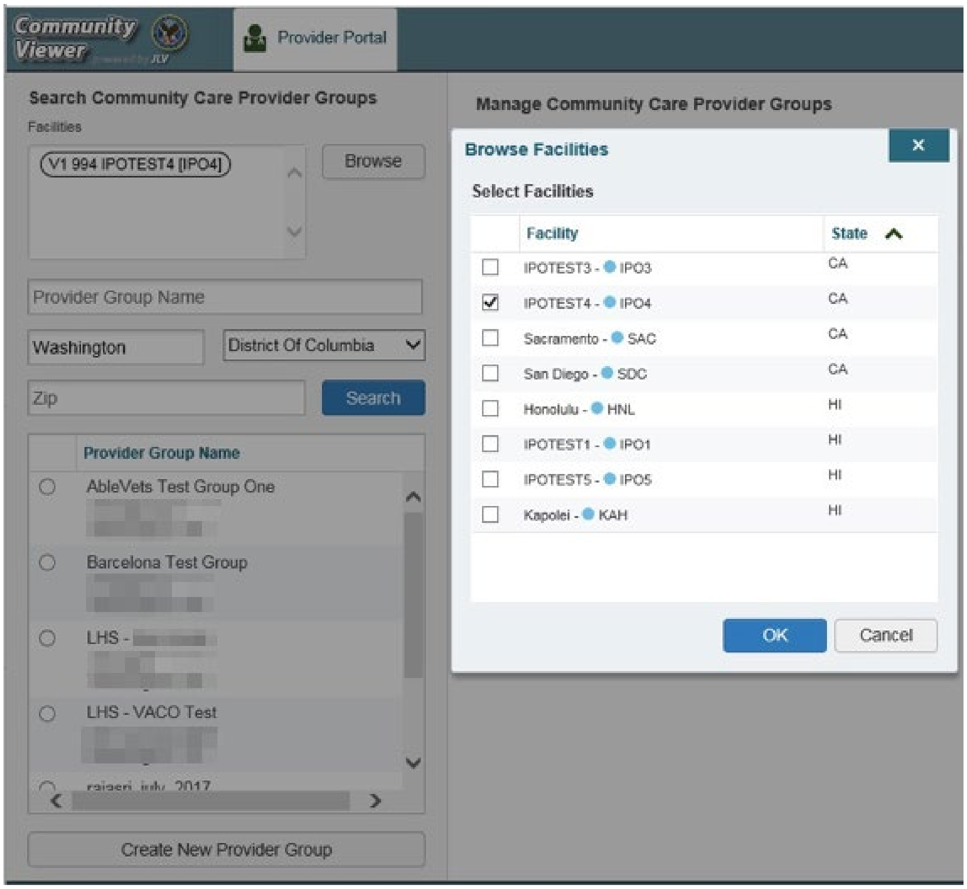
> **NOTE:** All search figures depict searches within and information from test databases.

3.5.1. Searching Provider Groups

When using the **Create/Edit Community Care Provider Groups** feature, you can perform a detailed search within the **Search Community Care Provider Groups** pane (Figure 22):

- 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

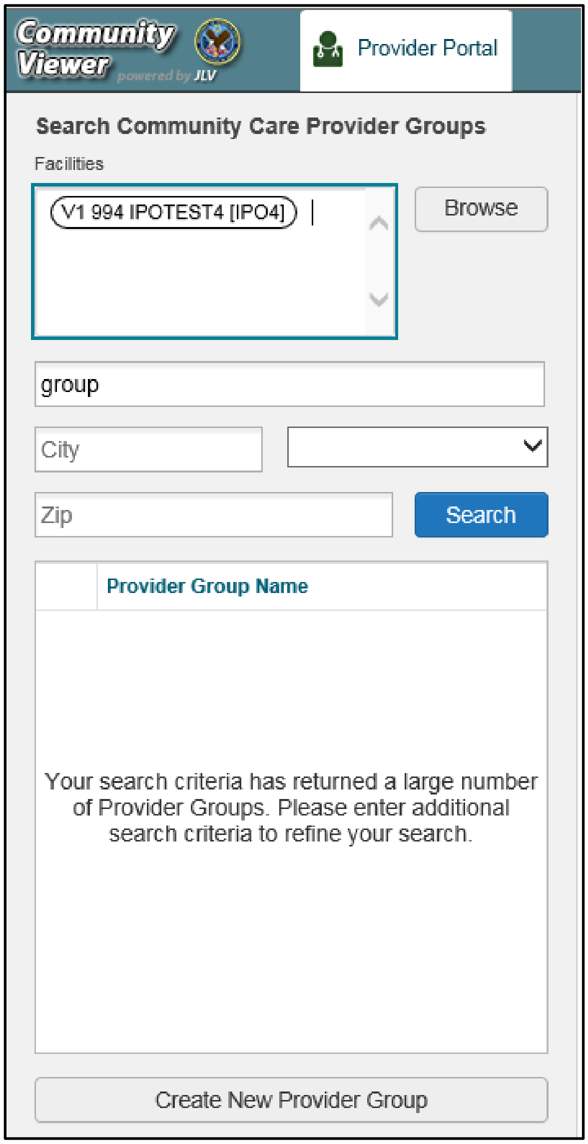
Figure 22: Browse Facilities Dialog Box–Community Care Provider Groups



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 23)

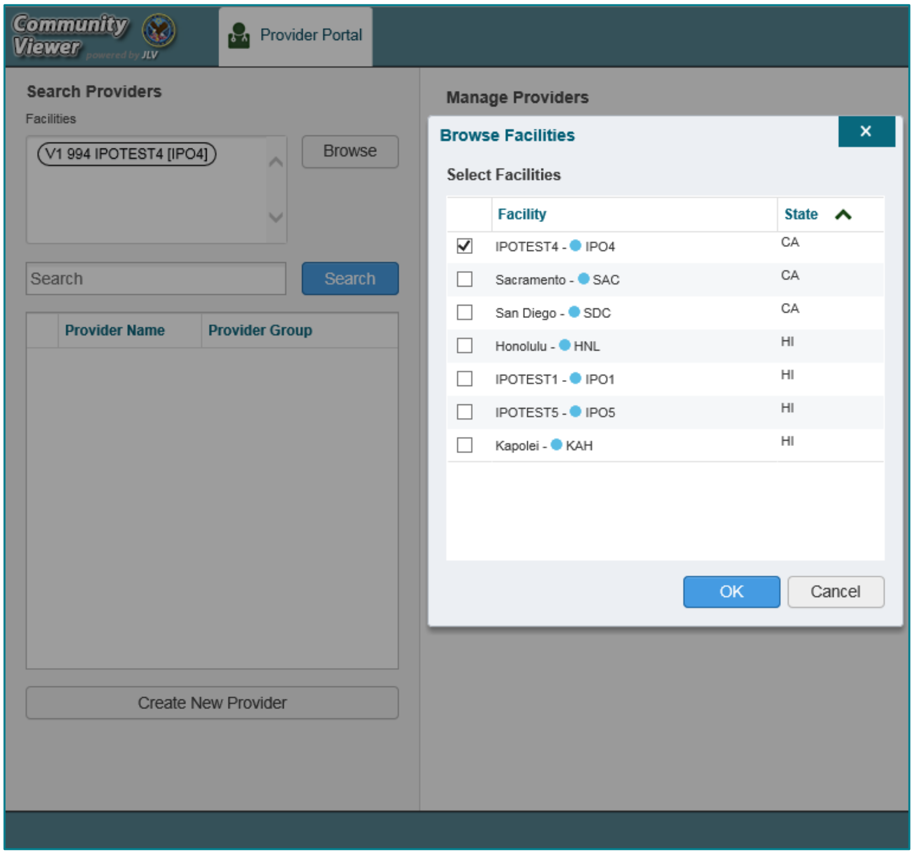
Figure 23: CV Community Care Provider Group Search: Too Many Results Notification



3.5.2. Searching Providers

When using the **Manage Provider (RMP)/Patient Assignment** feature in the **RMPM** widget, you can perform a detailed search within the **Search Providers** pane (Figure 24) by facility (VISN, site ID, facility name, and facility short name), provider group name, or provider name. You can also sort the facilities list by state when browsing for a facility and view the provider name and provider group within the search results.

Figure 24: Browse Facilities Dialog Box–Search Providers



3.5.3. Searching Patients

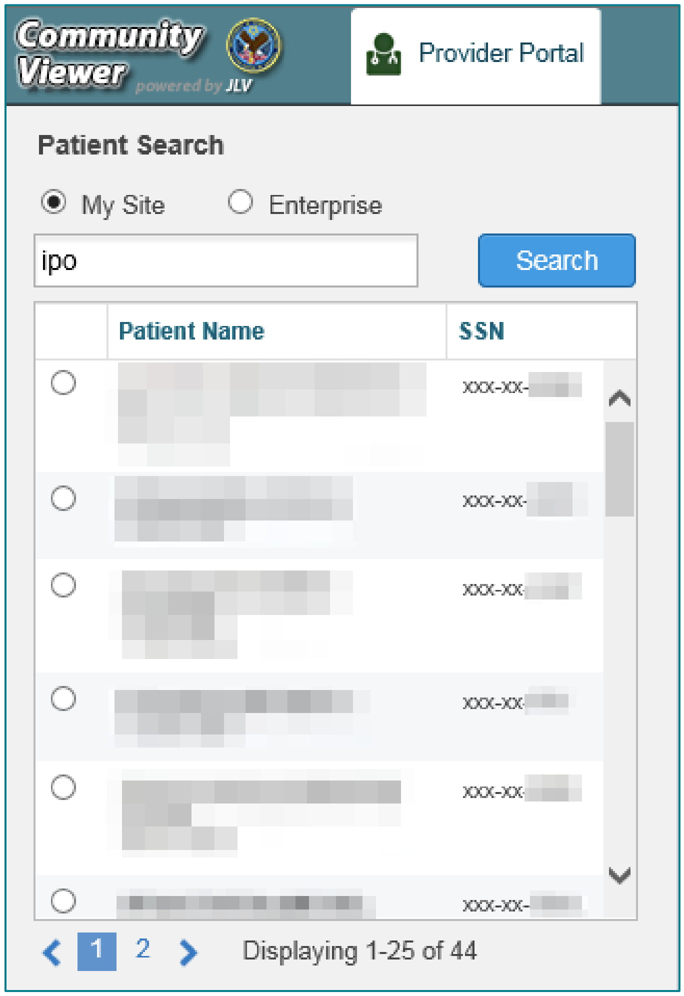
There are two types of patient searches in CV from the **Search Patient Assignments** feature:

- **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 (Figure 25)
- **Enterprise Search:** Searches all VistAs across the Enterprise; the patients listed in the search results are registered to one or more VistAs (Figure 26)

When searching for a patient within your site:

1. Select the **Search Patient Assignments** link from the **RMPM** 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 Social Security Number (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 25: My Site Patient Search

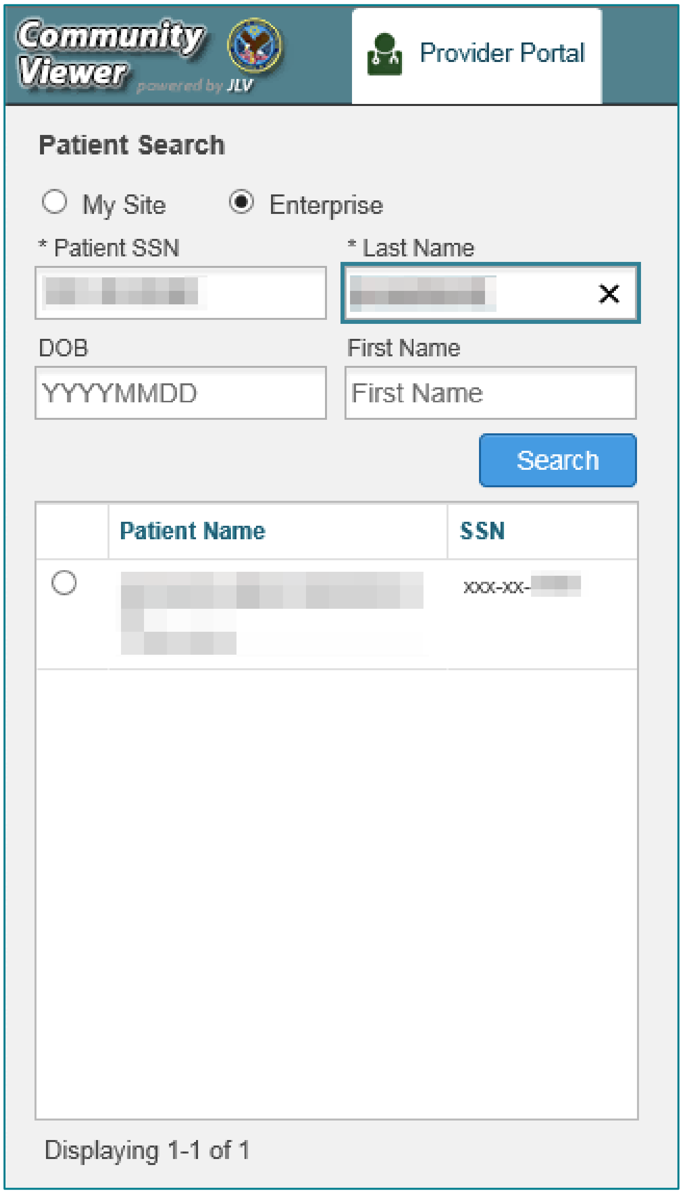


When searching for a patient across the Enterprise:

1. Select the **Search Patient Assignments** link from the **RMPM** widget
2. Select the **Enterprise** radio button
3. Enter the patient's SSN into the required **Patient SSN** field (required)
4. Enter the patient's full last name into the required **Last Name** field (required)
5. Enter the patient's date of birth (DOB) in the optional **DOB** field (optional)
6. Enter the patient's first name in the optional **First Name** field (optional)
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 26: Enterprise Patient Search



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

3.6. Managing Passwords

Initial RMP passwords are generated during account creation, as described in [Creating RMP Accounts](#). If a provider 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. The password reset link is valid for 24 hours.

3.6.1. Resetting Provider Passwords

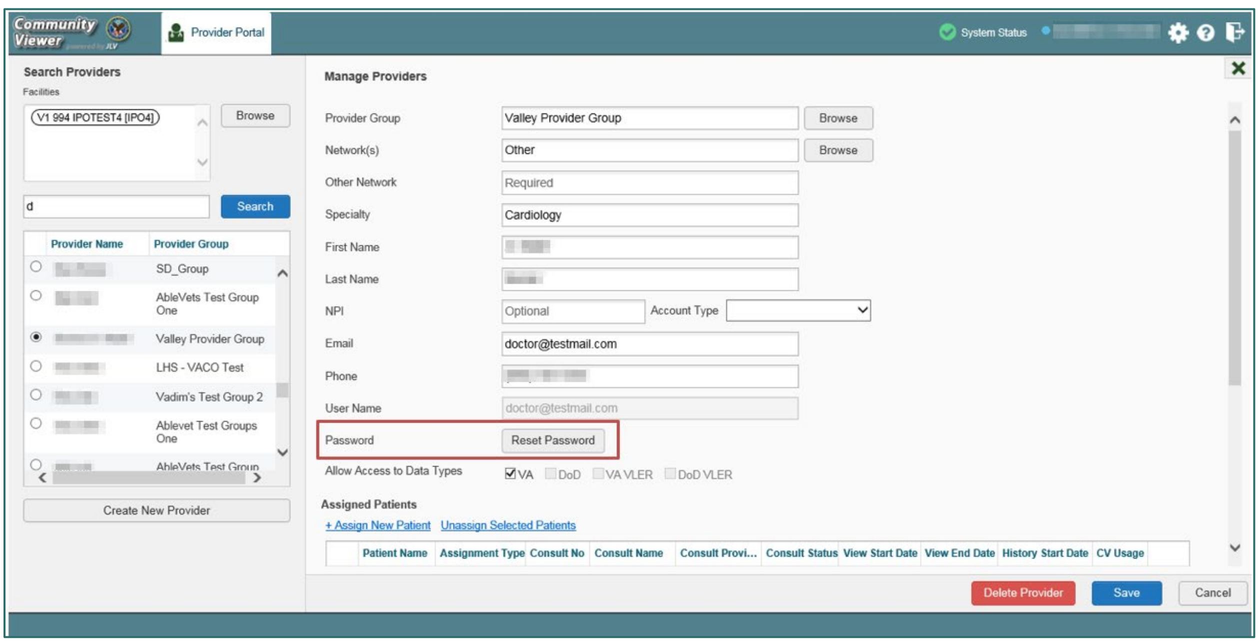
Password resets can also be performed manually by RM VA Staff. Follow these steps to automatically generate or manually reset an RMP's password.

1. Click the **Manage Provider (RMP)/Patient Assignment** link in the **RMPM** 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 VA Directive 6500 security compliance criteria, then click **Save**
6. Securely provide the RMP with his/her new password for CV
7. Click **Save**

Figure 27: RMP Password Reset



3.7. Assigning and Unassigning Patients

You can assign patients to an RMP via the **Risk Management Provider Management** widget.

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

CV uses the following rules to manage patient assignments:

- A Veteran may be assigned to more than one RMP for the following Assignment Types:
  - Episode of Care
- A specific Veteran/consult combination may only be assigned to a single RMP

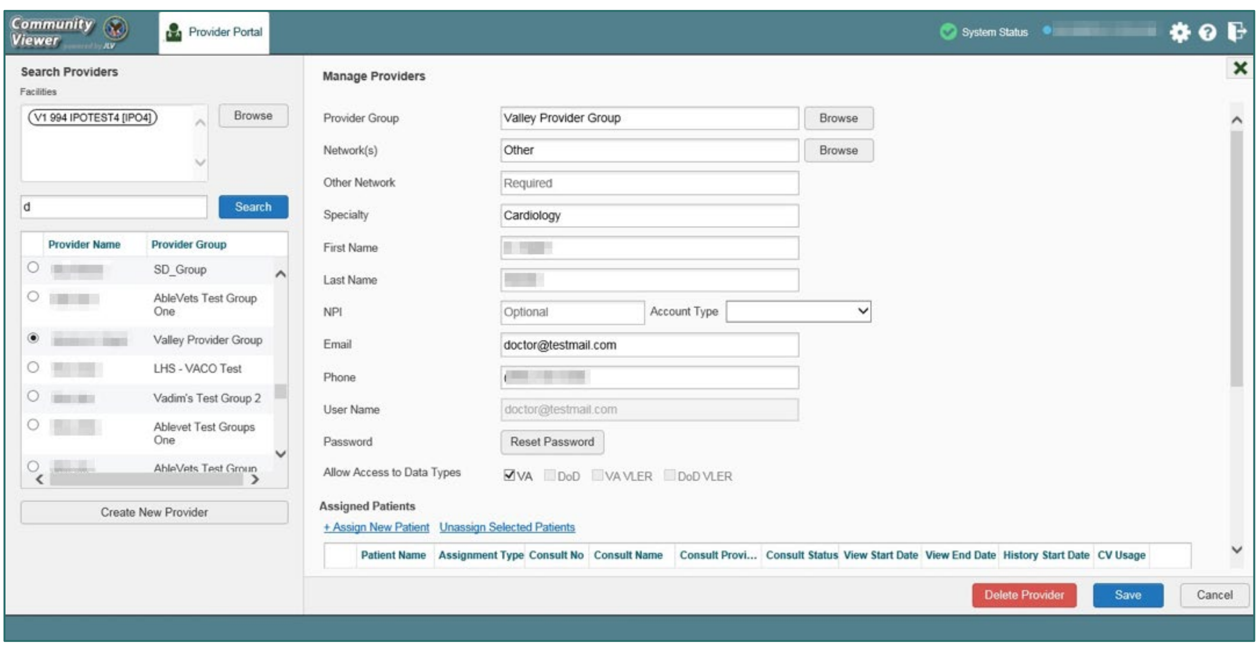
Table 2: Assignment Rules Examples

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

3.7.1. Creating Patient Assignments

1. Click the **Manage Provider (RMP)/Patient Assignment** link in the **RMPM** widget
2. Enter the provider's name in the **Patient Search** field within the **Search Providers** pane (Figure 28)
3. Click **Search**

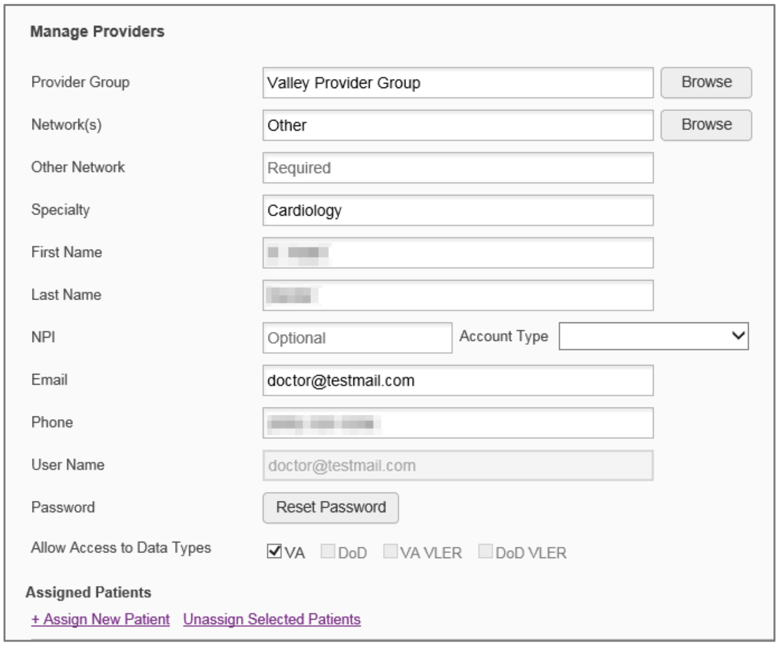
Figure 28: Search Providers Pane



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)

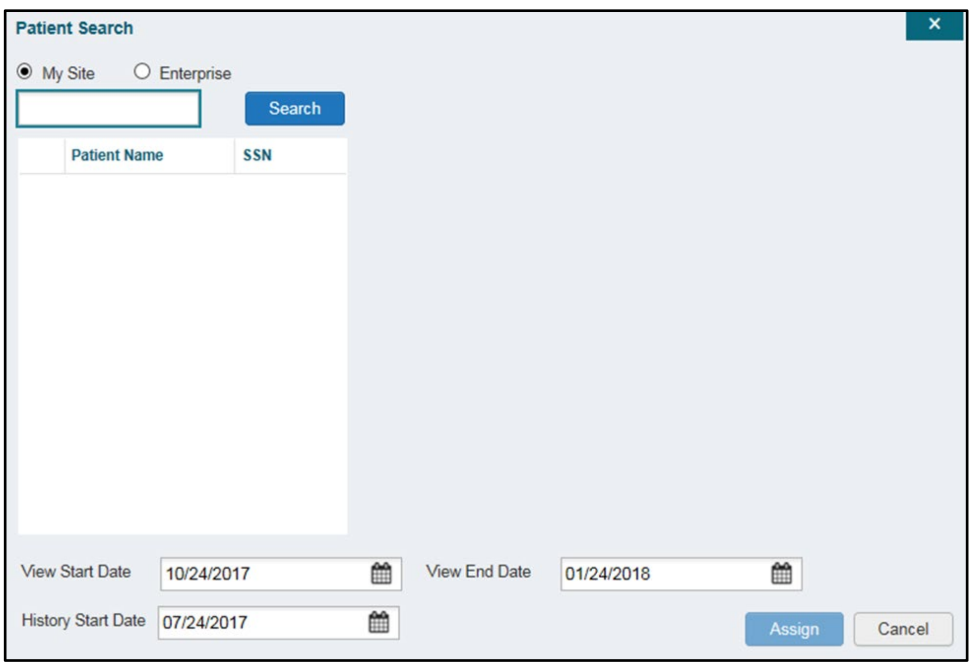
a. The **Patient Search** dialog opens

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: Consult 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 RMP (See Setting Record Display Limits.)
12. Click **Assign**
13. A notification is generated
    a. Review the message and edit as needed
14. Click **Send Email** or **Cancel**

3.7.2. Removing Patient Assignments

When it is necessary to unassign one or more patients from an RMP:

1. Repeat steps 1 - 3 from Creating Patient Assignments to navigate to the **Manage PPMS Providers** page
2. Select checkboxes for each patient you want to unassign
3. Click the **Unassign Selected Patients** link (highlighted in Figure 29)

3.7.3. Setting Record Display Limits

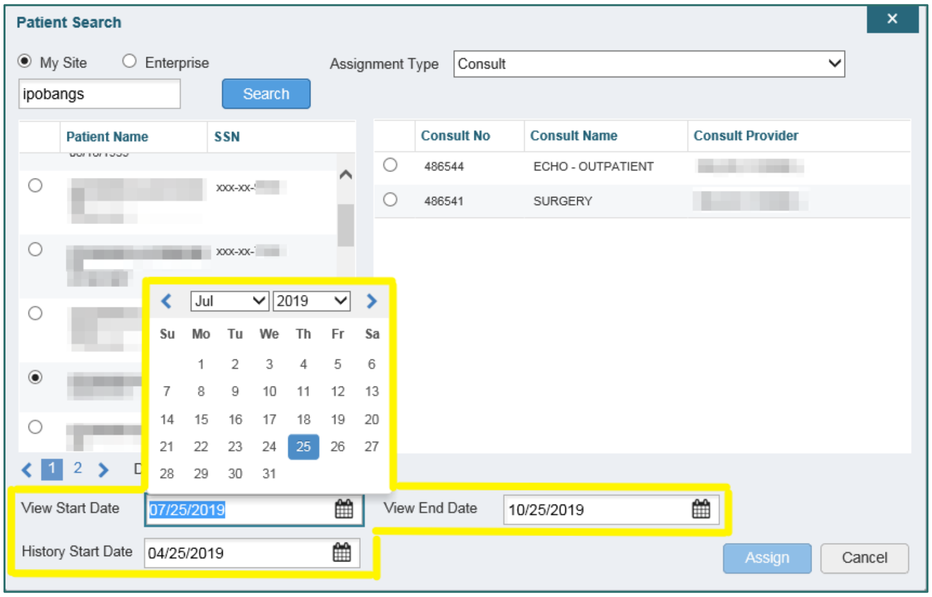
You can limit the patient records made available to the assigned RMP. There are two settings that control access to patient data:

- **View Start Date** and **View End Date**: These fields set the length of time the RMP has access to the patient records through CV
  - The default **View Start Date** is the date the patient is assigned to the RMP
  - 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 RMP is permitted to view
  - The default history start date is 3 months prior to the current date
  - If the history start date is set to 01/01/2012, for example, the RMP has access to the patient's records from 2012 to present

Data access controls (Figure 31) 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
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. Troubleshooting

4.1. 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 have trouble logging in to CV, please review Table 3 before contacting the ESD.

Table 3: Login Page Error Message Troubleshooting

Error Message	Resolution Steps
Could not save User Profile	***WHY?*** The error occurred during PIV authentication for VA users. It is either 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: "*Issuer: Veterans Affairs User 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 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)

Error Message	Resolution Steps
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 Sockets Layer (SSL) 2.0 setting (Windows 7 machine), or the Secure Sockets Layer 3.0 setting (Windows 10 machine), 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)
Smart Card required	***WHY?*** Your PIV (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 (Smart 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

4.2. Patient Search Errors

The following error messages may appear when searching for a patient in the **RMPM** widget. If you encounter error messages 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 criterion 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 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).

Error Message	Resolution Steps
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 message may display when invalid patient identifiers are entered or an error occurs either at the service layer or with an external system. ***FIX IT:*** Please try your search again.

5. Acronyms and Abbreviations

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

Table 5: Acronyms and Abbreviations

Acronym	Description
CPRS	Computerized Patient Record System
CV	Community Viewer
DOB	Date of Birth
ESD	Enterprise Service Desk
ID	Identification
IE	Internet Explorer
MVI	Master Veteran Index
NPI	National Provider Identifier
OIT	Office of Information and Technology
PIN	Personal Identification Number
PIV	Personal Identification Verification
POCs	Points of Contact
RM	Risk Management
RMP	Risk Management Provider
RMPM	Risk Management Provider Management
SSL	Secure Sockets 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