Veterans Health Information Exchange (VHIE) Portal

VHIE Portal User Guide

Version 2.3

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Department of Veterans Affairs

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Revision History

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

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

Artifact Rationale

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

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1. Introduction

The Veterans Health Information Exchange (VHIE), formerly known as, the Virtual Lifetime Electronic Record (VLER) Program, has been tasked by the Department of Veterans Affairs (VA) to replace the eHealth Exchange (eHX) solution with a Commercial-off-the-Shelf (COTS) product called the HealthShare Enterprise Platform (HSEP). As part of the migration, HealthShare (HS) will consume legacy applications that relies on the connection with the eHX Adapter, and in this case, the Veteran Authorization and Preferences (VAP) system. At a high-level, VAP manages Patient consent and the requests for generating CDA-type documents for selected veterans. To improve the process for consent management and provide a more streamlined and robust interface, the VAP interface and functionalities will be replaced by a custom-coded interface known, henceforth, as the VHIE Portal.

1.1. Purpose

The purpose of the VHIE Portal user guide is to familiarize internal VHA personnel and other authorized users about using the VHIE Portal interface.

2. System Summary

The VHIE Portal application is hosted at the Austin Information Technology Center (AITC). The system is only accessible within the VA intranet to authorized users. The VHIE Portal is intended for internal VHIE users to perform consent management tasks.

3. Getting Started

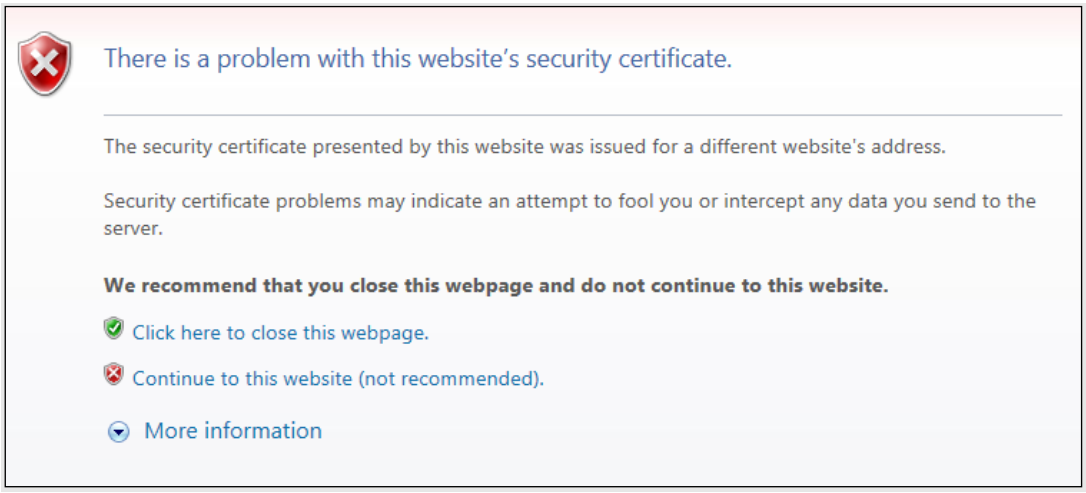
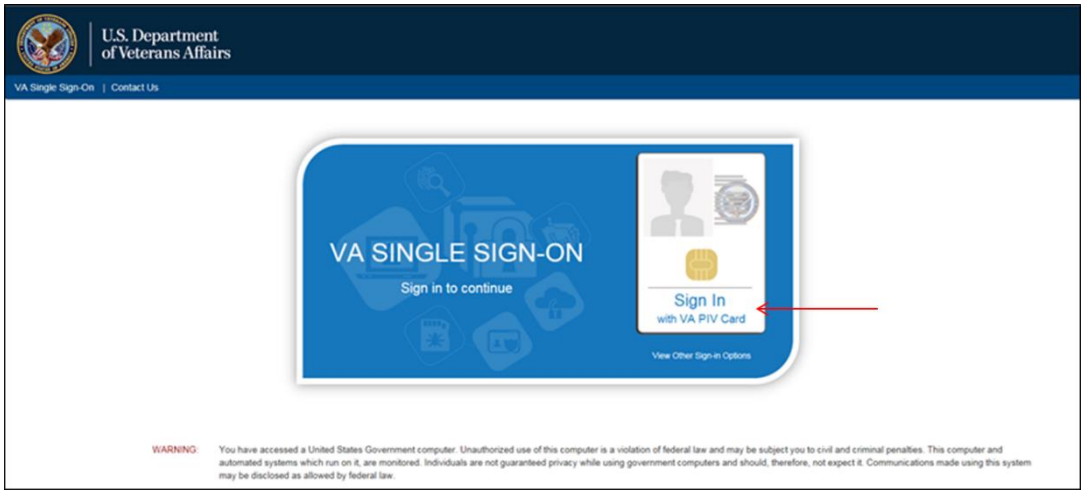
This section describes the steps for logging in and understanding the VHIE Portal functionalities.

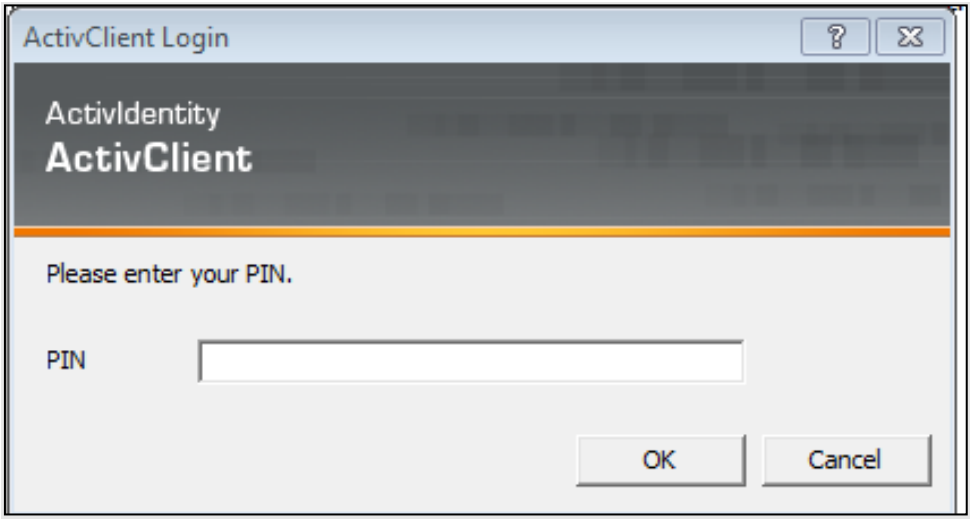
3.1. Log in via SSOi

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

Note: Once integrated with SSOi, users will only use their PIV card for login per VA's HSPD-12 implementation of mandatory PIV, unless a special exemption is permitted, and the user requires a VA username and password.

Table 1: Log in via SSOi

Step	Action
1.	Navigate to the VHIE Portal Login screen at [VHIE Portal Prod URL – TBD]. **Note**: If presented with the website's security certificate error, click on "Continue to this website (not recommended)". 
2.	Login using your PIV card. 

Step	Action
3.	Select the appropriate certificate and click **OK**. **Note**: Always select the second certificate as the authentication certificate. If you see more than two certificates displayed, make sure to clear your browser's cached certificates under Internet Tools.
4.	Enter the PIN associated with your PIV card and click **OK**. 

Step	Action
5.	Arrive at the VHIE Portal Landing Page.

3.2. Understanding the Functionalities

The VHIE Portal provides the following functionalities:

- Search for a Patient
- View Patient Demographic Details
- Participation Preference: Opt-Out Patient
- Participation Preference: Opt-In Patient
- Participation Preference: Delayed Consent
- View Patient Comments
- Generate CDA-Type Documents
- View Patient's VA Treatment Facilities
- Search Menu – Return to Patient Search
- Report Menu – Detailed Reports: Patient Opt-out
- Report Menu – Summary Reports: Patient Opt-out
- Admin Menu – View or Edit Partner Organization(s)
- Admin Menu – View or Edit Facilities List
- Welcome Menu – Access User Guide
- Welcome Menu – View, Add, or Remove Default Facility
- Welcome Menu – View System Software Information

3.3. Exit System

Logout of the VHIE Portal by selecting the Logout option under the Welcome menu at the top of the screen.

4. Using the Software

This section describes how to use the application with the following assumed experience/skills of the audience:

- Users have basic knowledge of the operating system (such as the use of commands, menu options, and navigation tools)
- Users are using the VHIE Portal to do their jobs
- Users have been provided active roles and access to the VHIE Portal
- Users have completed any prerequisite training

Consult your supervisor or the VA Help Desk if you need help meeting any of the above conditions.

4.1. Search for a Patient

The Patient Search screen allows a VHIE user to perform a basic search for the Patient.

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

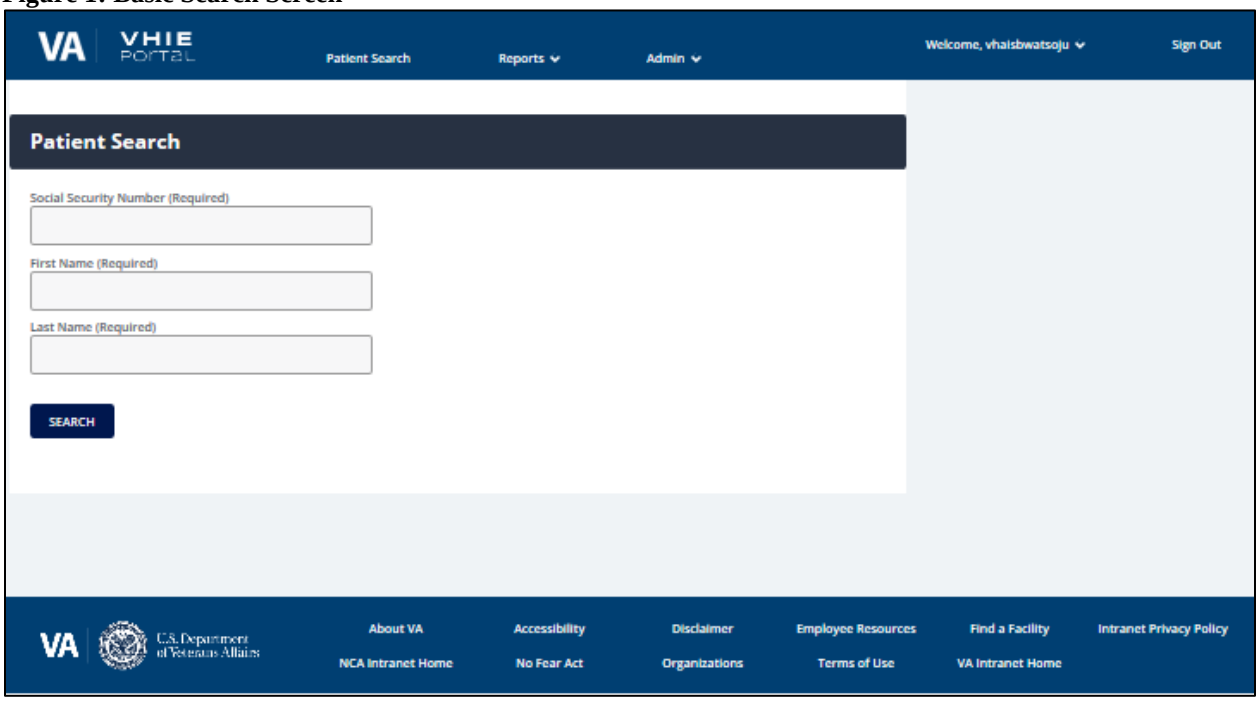
- **Prerequisite**: The user has logged in via SSOi or another VA-approved method for authentication.

4.1.1. Basic Search Screen

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

Note: The SSN, Last Name, and First Name fields are all required fields.

Figure 1: Basic Search Screen

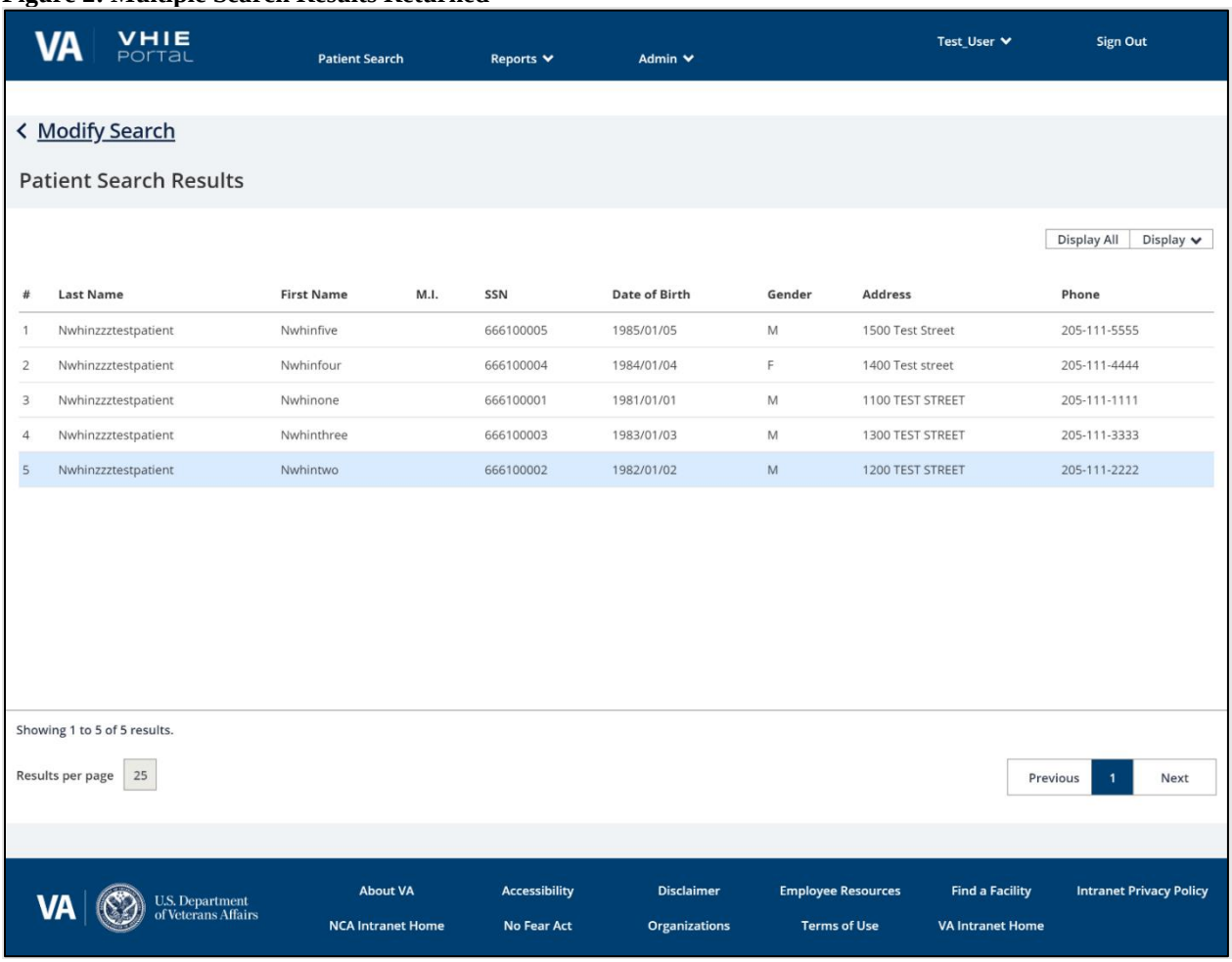


4.1.2. Patient Search Results

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

Note: The screen provided for this section is only a UI mockup.

Figure 2: Multiple Search Results Returned



#	Last Name	First Name	M.I.	SSN	Date of Birth	Gender	Address	Phone
1	Nwhinzzztestpatient	Nwhinfive		666100005	1985/01/05	M	1500 Test Street	205-111-5555
2	Nwhinzzztestpatient	Nwhinfour		666100004	1984/01/04	F	1400 Test street	205-111-4444
3	Nwhinzzztestpatient	Nwhinone		666100001	1981/01/01	M	1100 TEST STREET	205-111-1111
4	Nwhinzzztestpatient	Nwhinthree		666100003	1983/01/03	M	1300 TEST STREET	205-111-3333
5	Nwhinzzztestpatient	Nwhintwo		666100002	1982/01/02	M	1200 TEST STREET	205-111-2222

4.2. Patient Detail Summary

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

- Consent Status
- Comments
- Generate Documents
- Patient Facilities

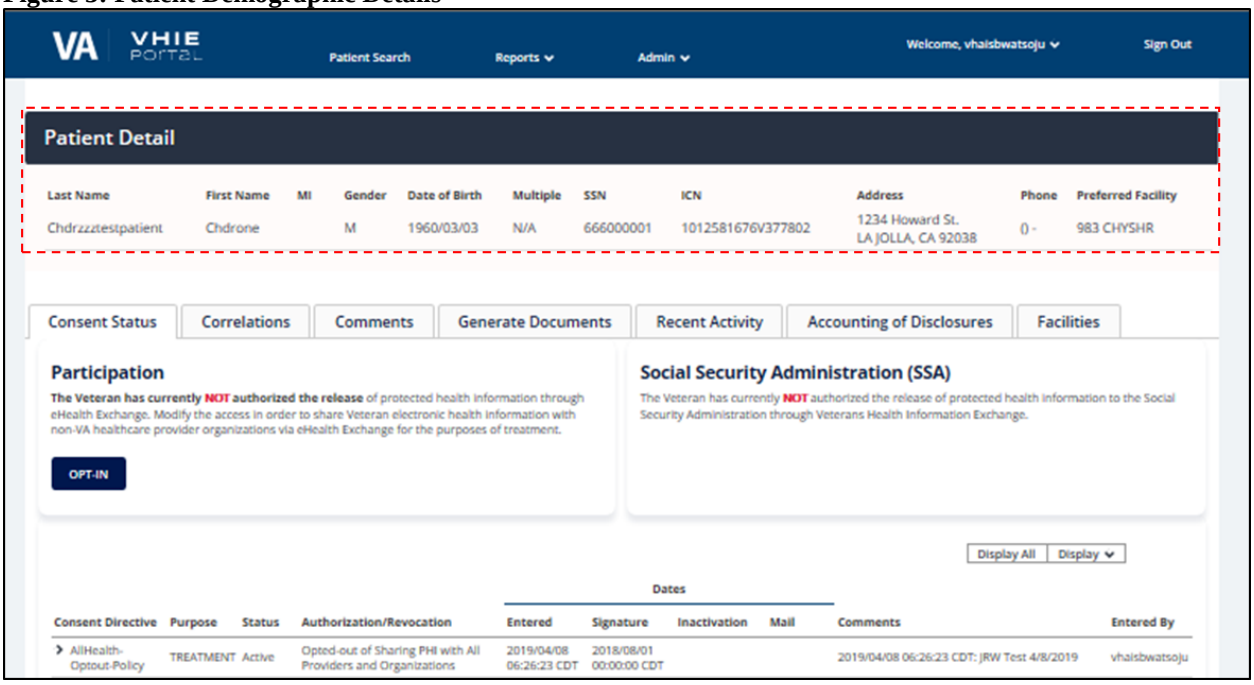
Prerequisite:

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

4.2.1. View Patient Details

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

Figure 3: Patient Demographic Details



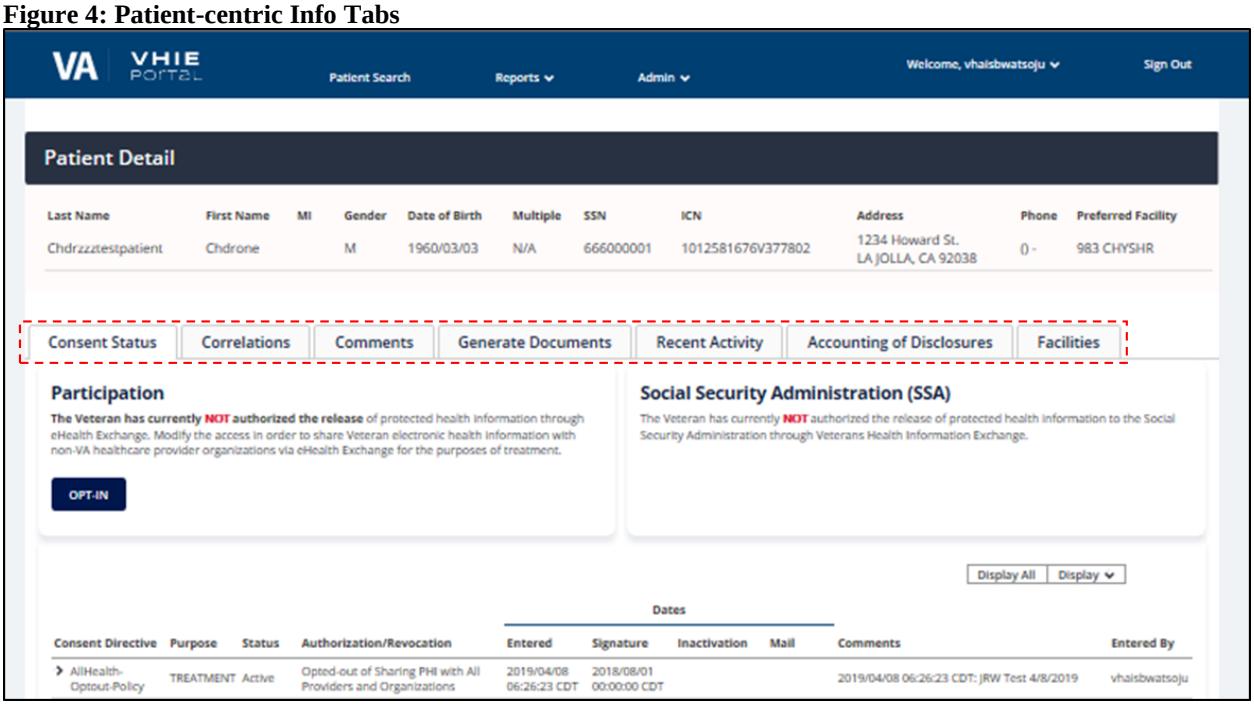
4.2.2. Patient-centric Functions

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

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

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

Figure 4: Patient-centric Info Tabs



4.3. Consent Status Tab

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

Prerequisite:

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

4.3.1. Participation Preference: Patient Opt-Out of Sharing

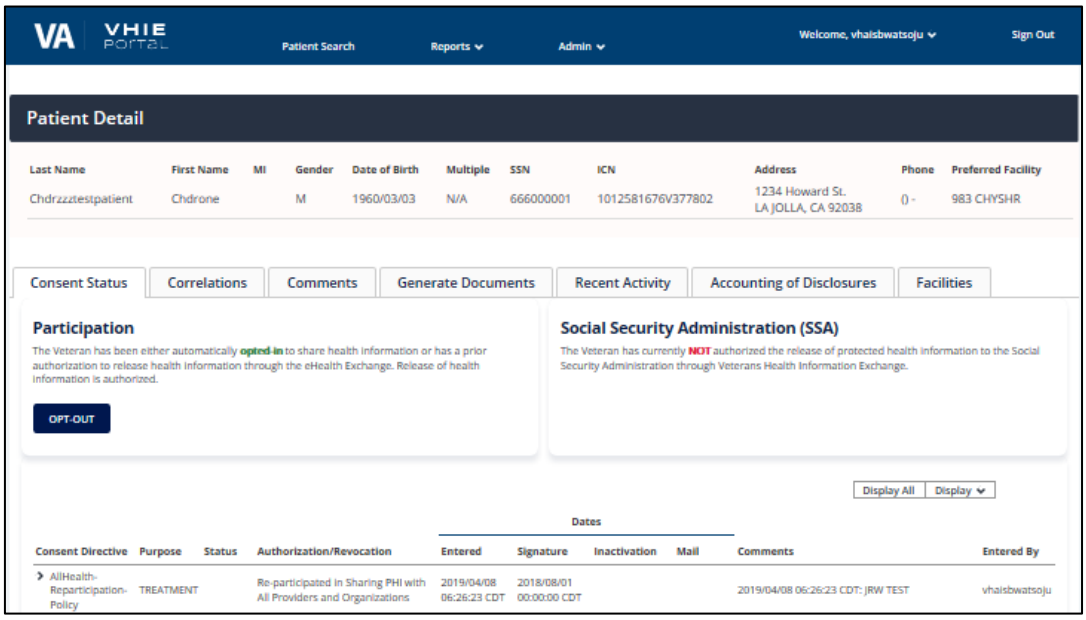
If the Patient is currently participating in the sharing of Health information, a VHIE user can take the following steps to update the Patient's consent status so that the Patient is opted-out of sharing.

Prerequisite:

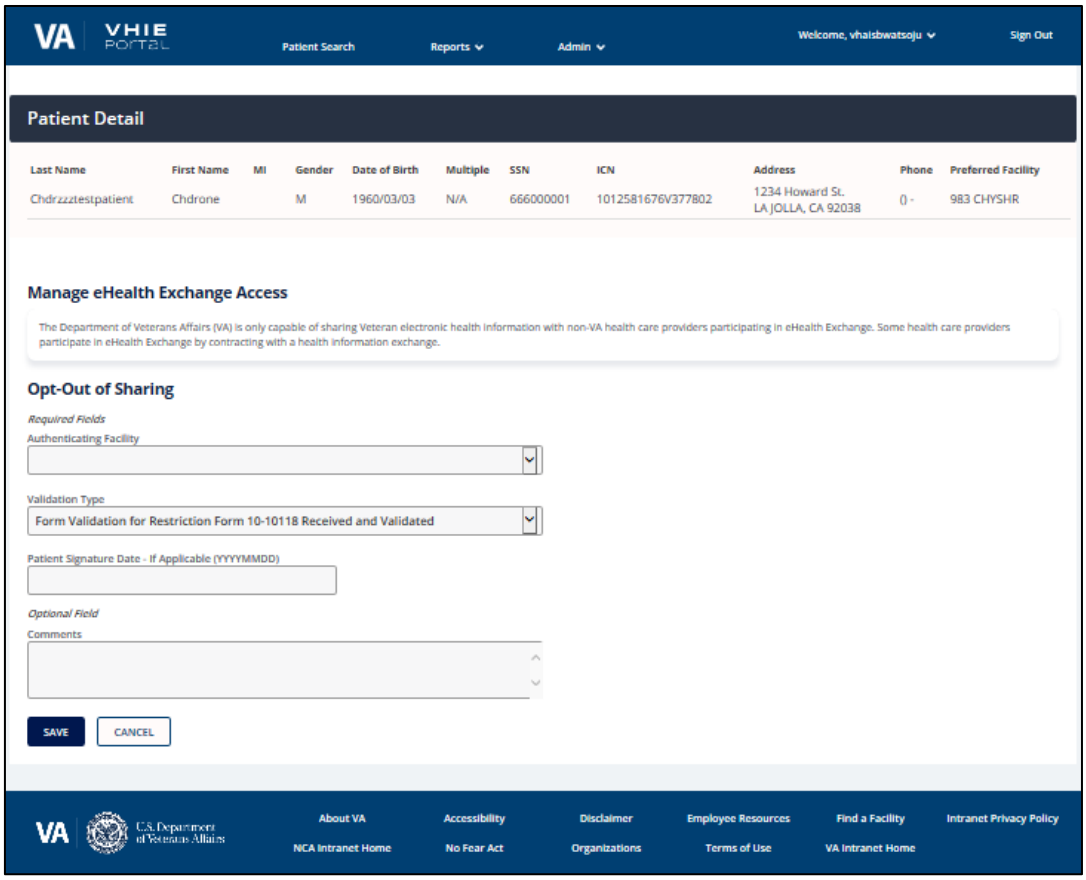
- The user has logged in via SSOi or another VA-approved method for authentication.
- The user has successfully retrieved a record from a Patient Search.
- The Patient has an opt-in consent status.

Table 2: Patient Opt-out of Sharing

Step	Action
1.	If the veteran is currently participating in sharing, there will be an Opt-Out option. Select the Opt-Out button to open the participation form and fill out the required information.



Step	Action
2.	Complete the required information fields and click the Save button to update the Veteran's participation status.



4.3.2. Participation Preference: Patient Re-participate in Sharing

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

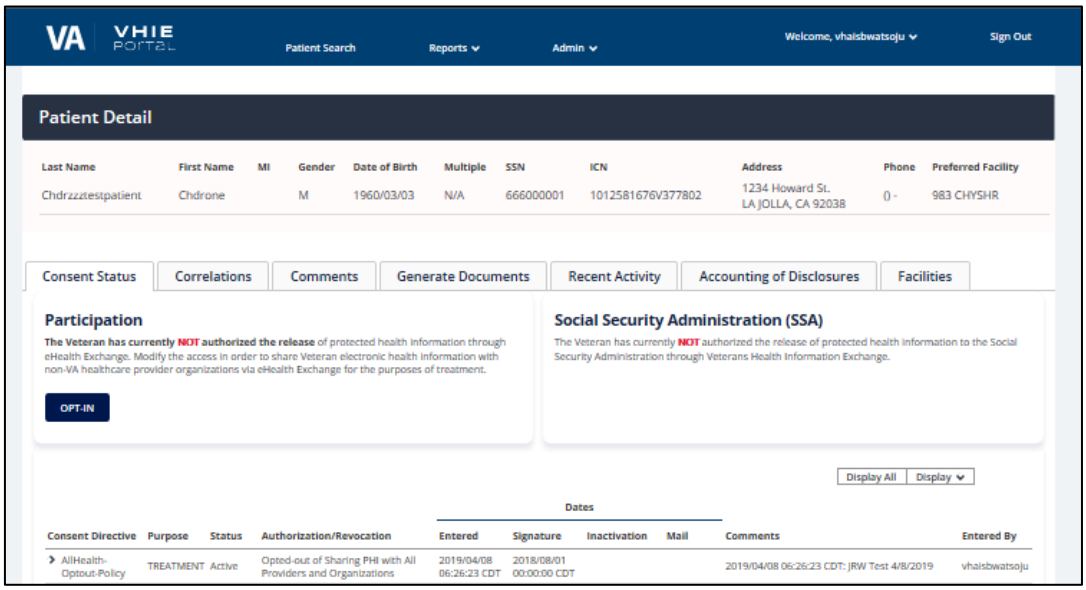
Prerequisite:

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

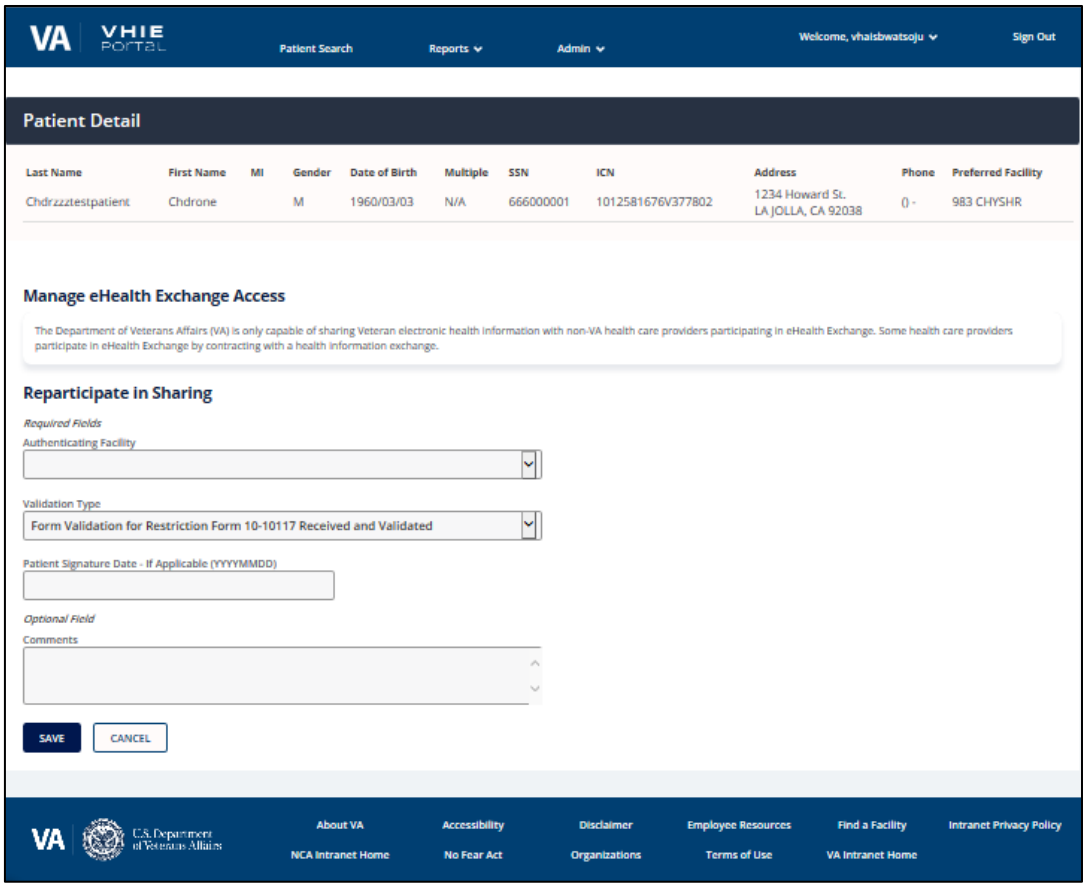
Note: If the Patient had explicitly opted-out (not participating) in the legacy system, the opt-out preference is honored in HealthShare.

Table 3: Patient Re-participate in Sharing

Step	Action
1.	If the veteran is currently not participating in sharing, there will be an Opt-In option. Select the Opt-In button to open the participation form and fill out the required information.



Step	Action
2.	Complete the required information fields and click the Save button to update the Veteran's participation status.



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

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

Prerequisite:

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

Table 4: Delayed Consent for Opt-Out (Not Participating)

Step	Action
1.	If the veteran is currently not participating in sharing, there will be an Opt-Out option. Select the Opt-Out button to open the participation form and fill out the required information.

VA VHIE PORTAL | Patient Search | Reports | Admin | Welcome, vhaisbwatsoju | Sign Out

Patient Detail

Last Name	First Name	MI	Gender	Date of Birth	Multiple	SSN	ICN	Address	Phone	Preferred Facility
Chdrzzztestpatient	Chdrone		M	1960/03/03	N/A	666000001	1012581676V377802	1234 Howard St. LA JOLLA, CA 92038	() -	983 CHYSHR

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

Participation

The Veteran has been either automatically **opted-in** to share health information or has a prior authorization to release health information through the eHealth Exchange. Release of health information is authorized.

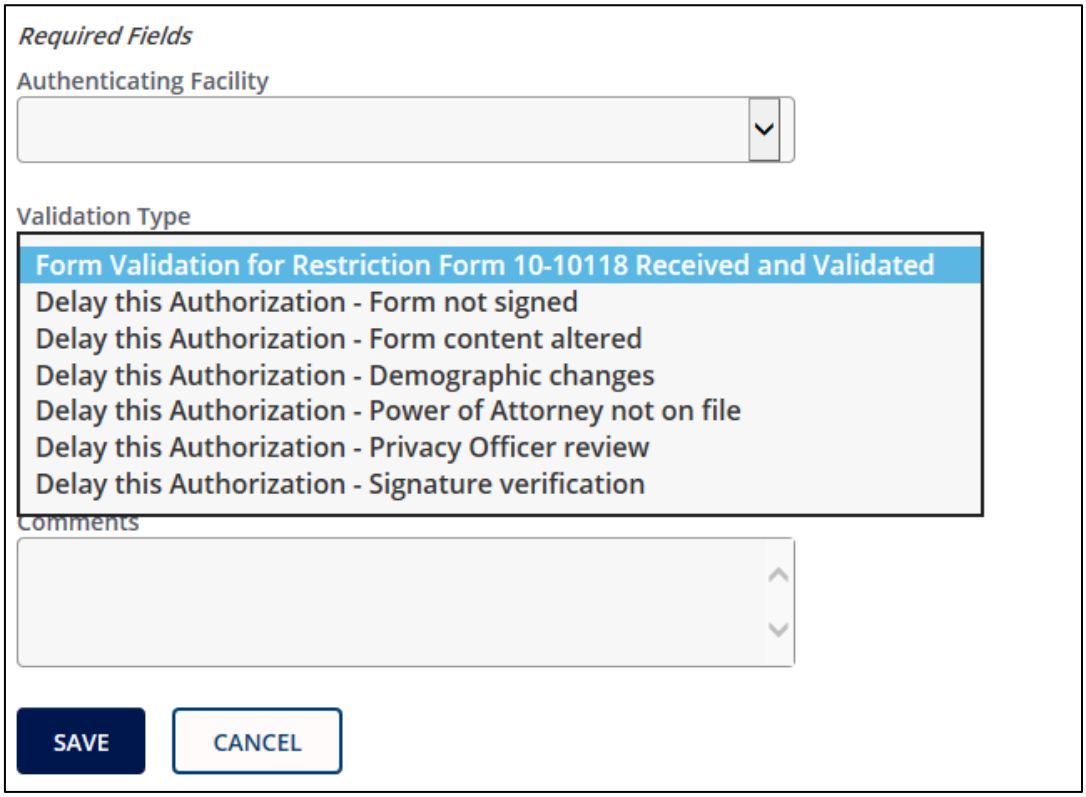
OPT-OUT

Social Security Administration (SSA)

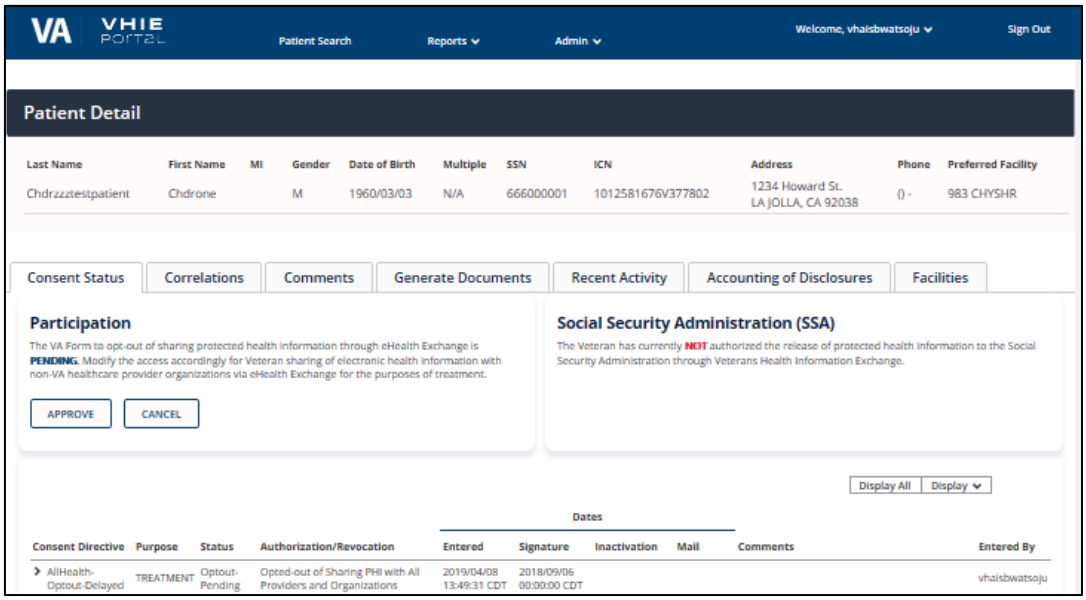
The Veteran has currently **NOT** authorized the release of protected health information to the Social Security Administration through Veterans Health Information Exchange.

Display All | Display

Consent Directive	Purpose	Status	Authorization/Revocation	Dates: Entered	Dates: Signature	Dates: Inactivation	Dates: Mail	Comments	Entered By
AllHealth-Reparticipation-Policy	TREATMENT		Re-participated in Sharing PHI with All Providers and Organizations	2019/04/08 06:26:23 CDT	2018/08/01 00:00:00 CDT			2019/04/08 06:26:23 CDT: JRW TEST	vhaisbwatsoju

Step	Action
2.	Under Validation Type, select one of the following Delayed Consent reasons, then click Save: 1. Delay this Authorization - Form not signed 2. Delay this Authorization - Form content altered 3. Delay this Authorization - Demographic changes 4. Delay this Authorization - Power of Attorney not on file 5. Delay this Authorization - Privacy Officer review 6. Delay this Authorization - Signature verification 

Step	Action
3.	When the participation status is currently Pending or Delayed, there will be options to Approve or Cancel the pending participation status.



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

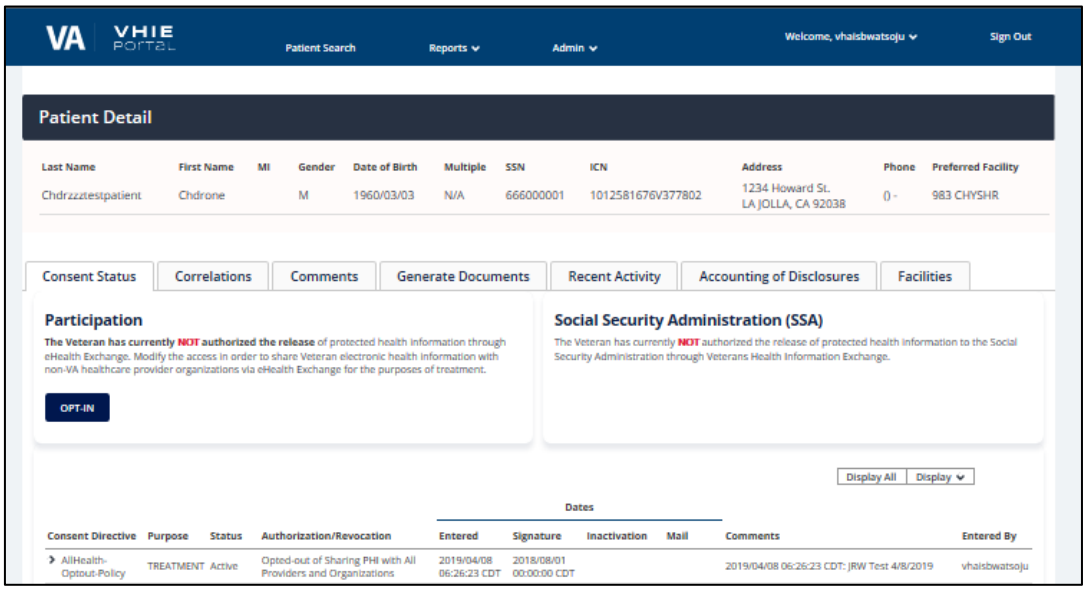
A VHIE user can take the following steps to process a delayed consent if the Patient has submitted paperwork to participate in sharing, but there were discrepancies with the paperwork.

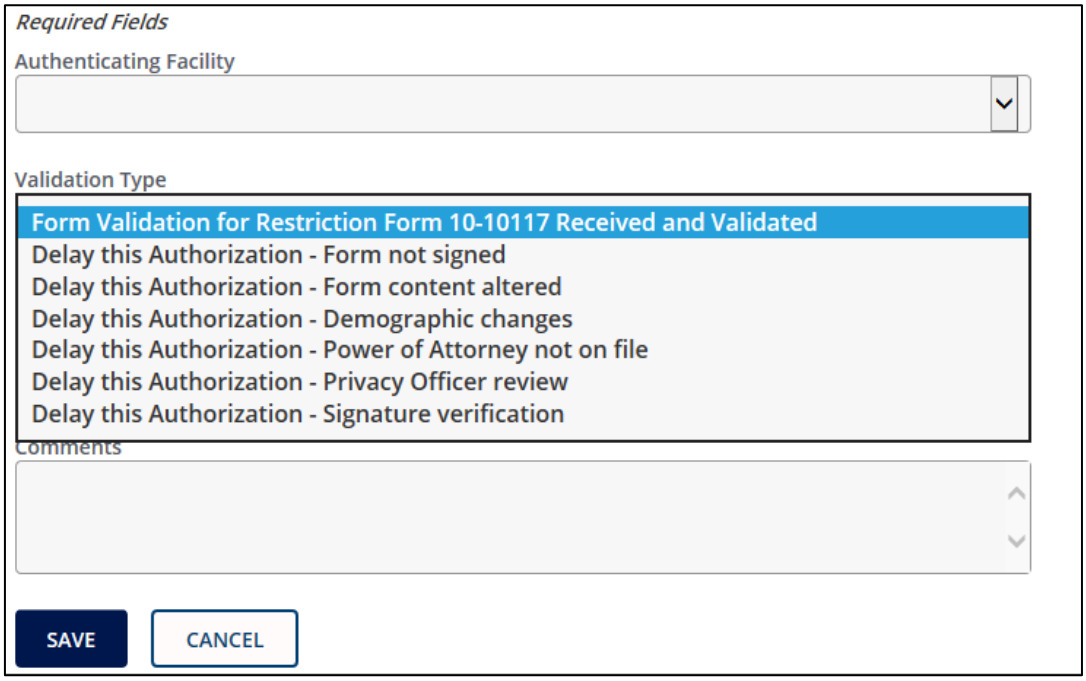
Prerequisite:

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

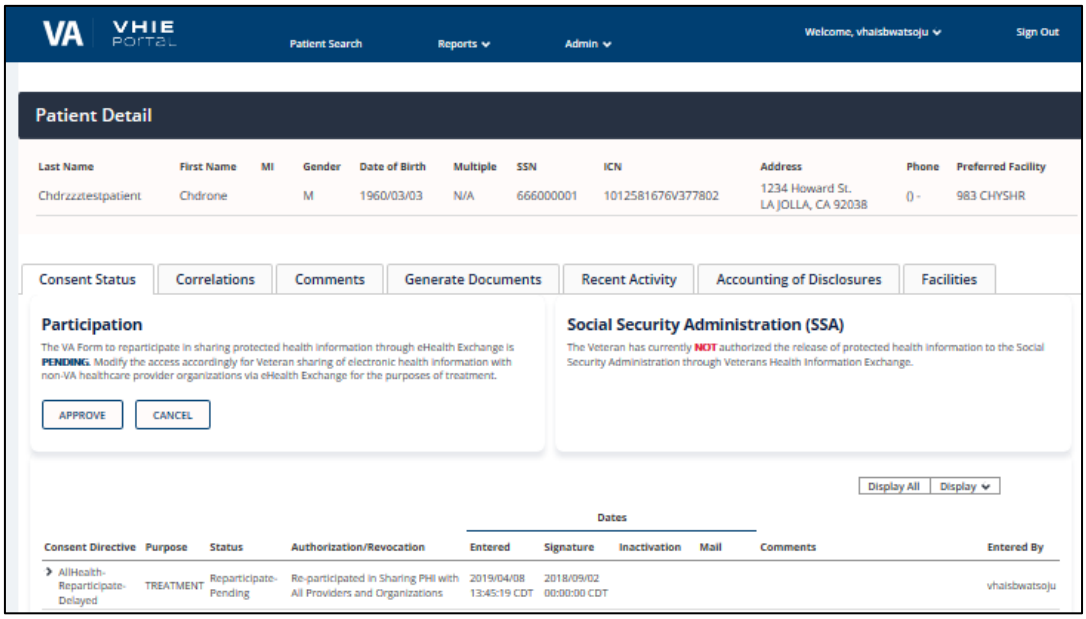
Table 5: Delayed Consent for Opt-In (Participating)

Step	Action
1.	If the veteran is currently not participating in sharing, there will be an Opt-In option. Select the Opt-In button to open the participation form and fill out the required information.



Step	Action
2.	Under Validation Type, select one of the following Delayed Consent reasons, then click Save: 1. Delay this Authorization - Form not signed 2. Delay this Authorization - Form content altered 3. Delay this Authorization - Demographic changes 4. Delay this Authorization - Power of Attorney not on file 5. Delay this Authorization - Privacy Officer review 6. Delay this Authorization - Signature verification 

Step	Action
3.	When the participation status is currently Pending or Delayed, there will be options to Approve or Cancel the pending participation status.



4.4. View Patient Comments

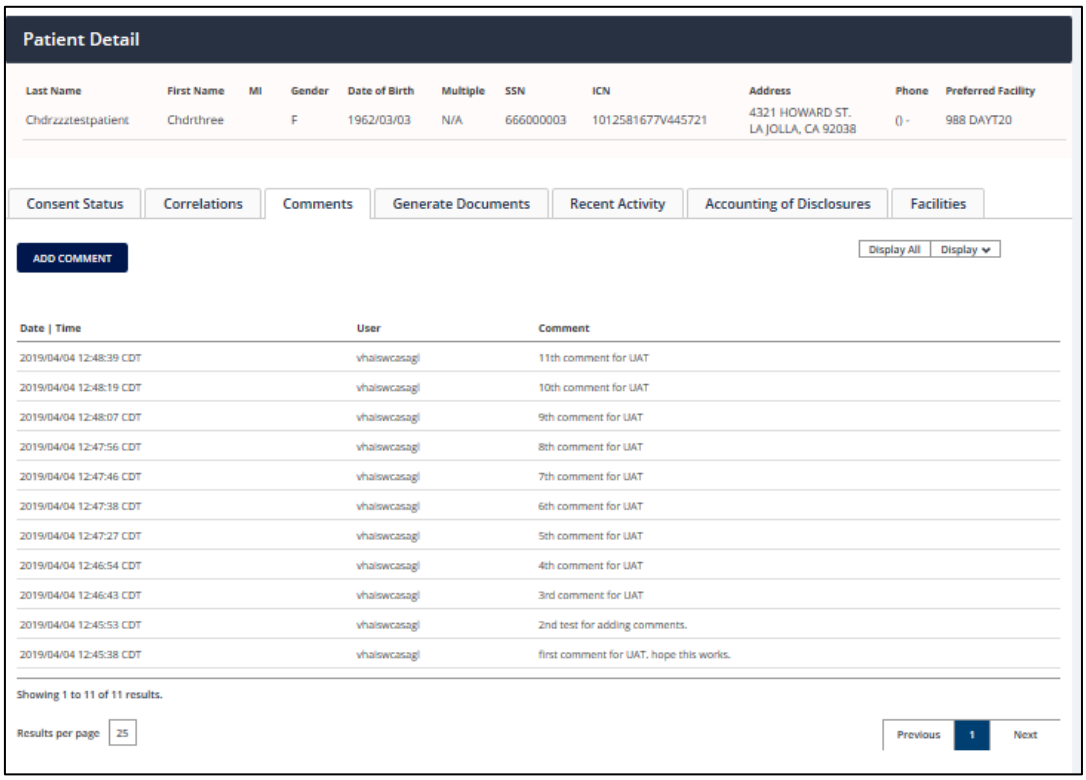
A VHIE user can select the Comments tab to view or add general comments about the Patient.

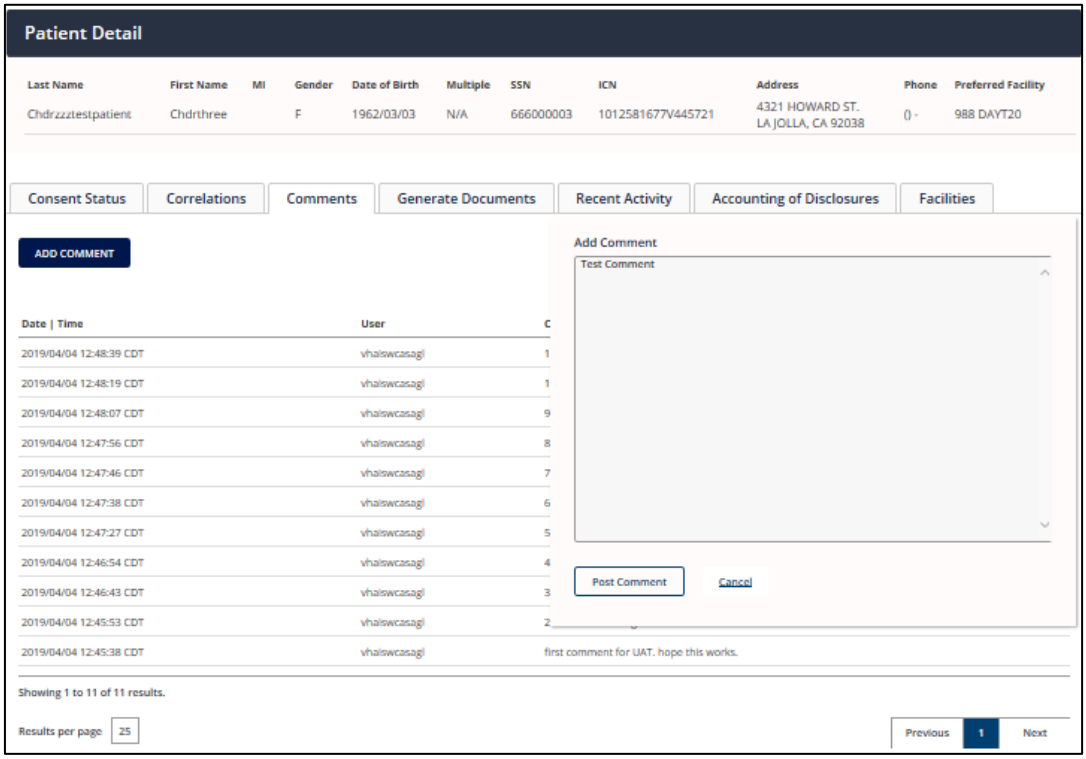
Prerequisite:

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

Table 6: View Patient Comments

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



Step	Action
2.	A comment field and “Post Comment” button will appear on the right side of the screen. **Note**: Comments posted in this area are only viewable in VHIE Portal. 

4.5. Generate CDA-Type Documents

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

Prerequisite:

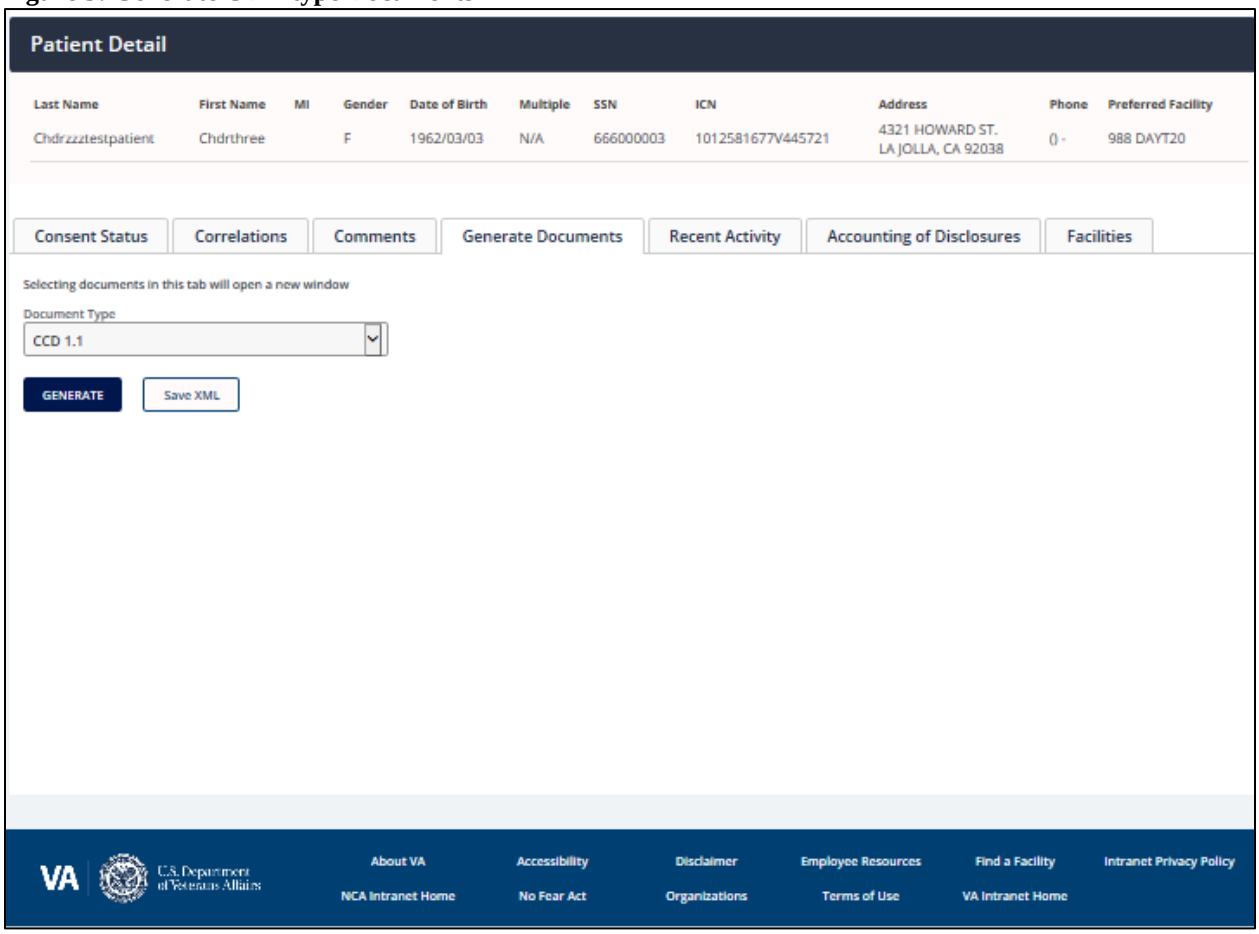
- The user has logged in via SSOi or another VA-approved method for authentication.
- The user has successfully retrieved a record from a Patient Search.

Note:

1) When generating a CDA-type document, the artifact is generated in a new browser window.
2) If the user experiences any issues with generating a document, it is recommended to configure the browser’s security and privacy settings for the VHIE Portal to allow pop-ups and redirects.

3) To print the CDA-type document, the user can utilize the browser's built-in Print functionality to either print or do a print preview.

Figure 5: Generate CDA-type Documents



4.6. View Patient's VA Treatment Facilities

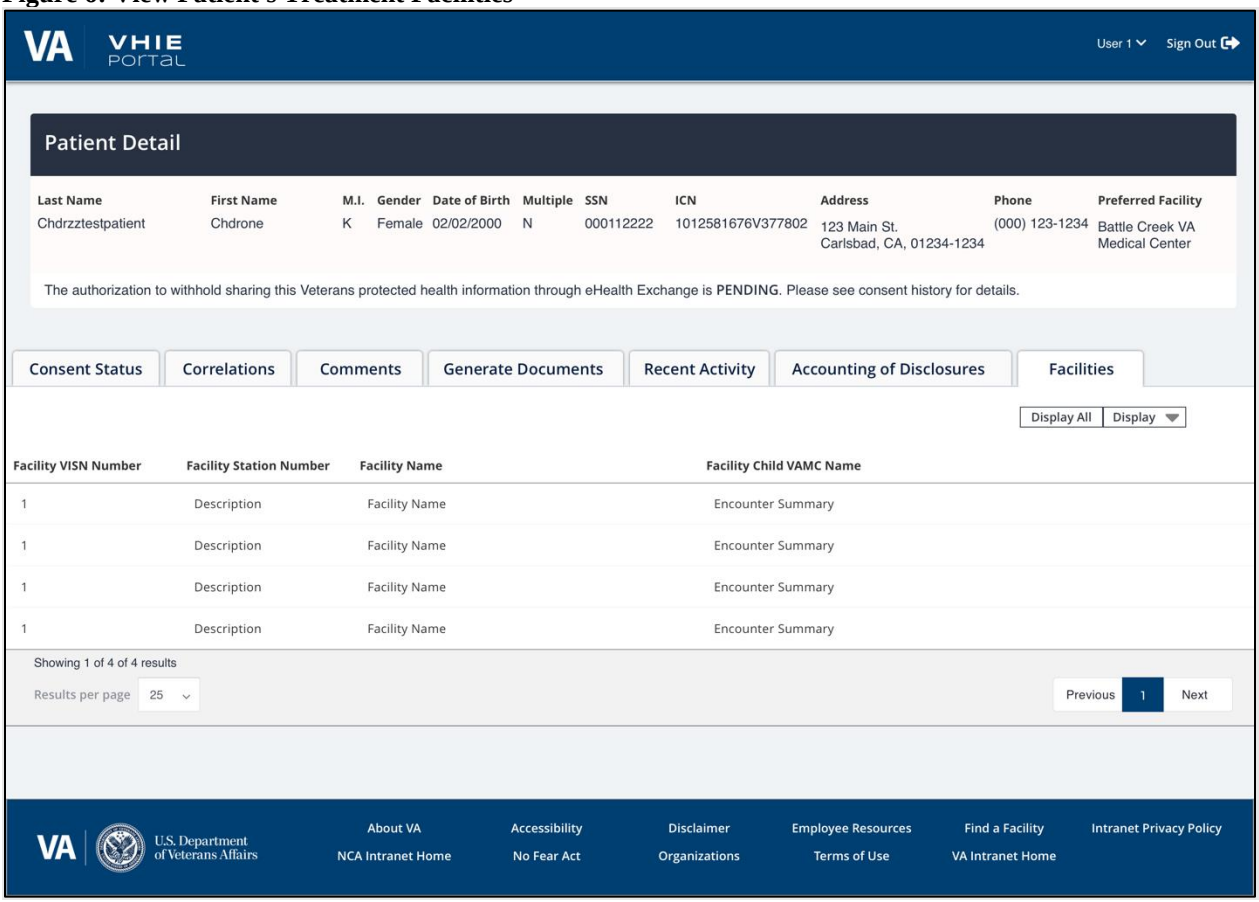
A VHIE user can select the Facilities tab in the Patient Detail page to view the Patient's VA Treatment Facilities.

Prerequisite:

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

Note: The screen provided for this section is only a UI mockup.

Figure 6: View Patient's Treatment Facilities



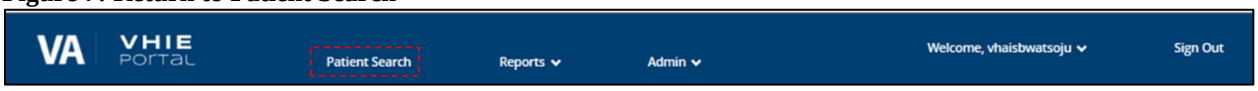
4.7. Search Menu – Return to Patient Search

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

Prerequisite:

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

Figure 7: Return to Patient Search



4.8. Report Menu – Detailed Opt-Out Patient Reports

The Detailed Opt-out patient report can be found under the Reports menu > Detailed Reports.

Fill in the report criteria and select Search to generate a report.

Figure 8: Detailed Patient Opt-Out Report Search

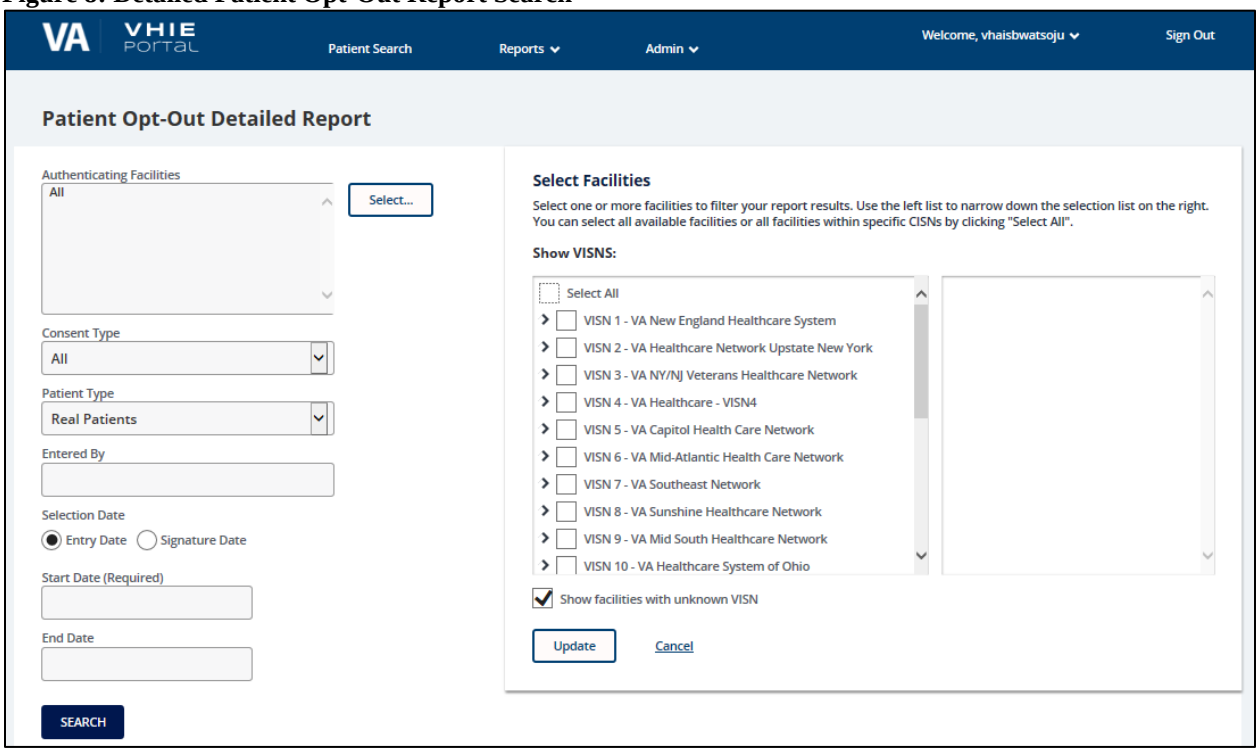
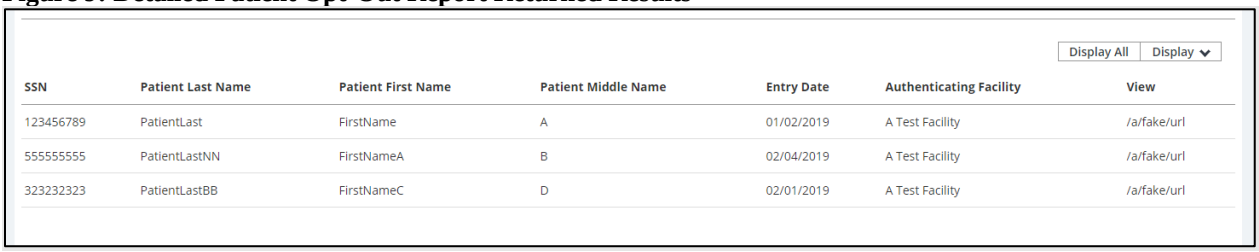


Figure 9: Detailed Patient Opt-Out Report Returned Results



Display All | Display

SSN	Patient Last Name	Patient First Name	Patient Middle Name	Entry Date	Authenticating Facility	View
123456789	PatientLast	FirstName	A	01/02/2019	A Test Facility	/a/fake/url
555555555	PatientLastNN	FirstNameA	B	02/04/2019	A Test Facility	/a/fake/url
323232323	PatientLastBB	FirstNameC	D	02/01/2019	A Test Facility	/a/fake/url

4.9. Report Menu – Summary Opt-Out Patient Reports

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

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

4.10. Admin Menu – View or Edit Partner Organizations

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

Prerequisite:

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

Figure 10: Partner Organizations List

Partner Organizations

Display All | Display

Name	Description	Phone	Contact	Active	Prefix	Consumer Only	Domain	Number	Organization ID	Trusted Clinical Source
Adventist Health Sys	adventish organization description for UAT Lisa			Yes	urn:oid:	No	*NAA	200NAA	2.16.840.1.113883.3.787.0.0	No
Alabama One Health Record			Contact	Yes	urn:oid:	No	*NAL	200NAL	1.3.6.1.4.1.38694	No
Alaska Ehealth Network		(857) 488-4749	Phil Hunt	No	urn:oid:	No	*NAK	200NAK	2.16.840.1.113883.3.89.100.20.30.1	No
Allina Health	zsekjrfv naolsejfna lskfjn alzfjzlskfjaz;slkfjnv alfja;zlsfejn z;lefjzkjmrzkjvn	(612) 262-4386	Contact Chris Hirsch	No	urn:oid:	No	*NAH	200NAH	1.2.840.114350.1.13.8.3.7.3.688884.100	No
Asante	Asante Org description	5635551212	Contact Me	No	urn:oid:	No	N/A	200NAS	1.2.840.114350.1.13.333.3.7.3.688884.100	Yes
Benson Health Clinc			Contact	Yes	urn:oid:	No	*NPJ	999MMM	2.99.999.9.999999.99.9.9	No
Benson Health Clinc 2			Contact	No	urn:oid:	No	*MMM	299MMM	3.99.999.9.999999.99.9.9	No
Bon Secours Health System		(804) 359-4500		Yes	urn:oid:	No	N/A	200NBO	1.2.840.114350.1.13.197.3.7.3.688884.100	No
Buffalo Medical Group Pc		(716) 630-2516	Contact Lisa Schulze	No	urn:oid:	No	*NBM	200NBM	1.2.840.114350.1.13.10.3.7.3.688884.100	No
Cahie Pulse	200NIL		Contact	Yes	urn:oid:	Yes	*NIL	200NIL	2.16.840.1.113883.9.224	No

Showing 1 to 10 of 135 results.

Results per page 10 | Previous | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | Next

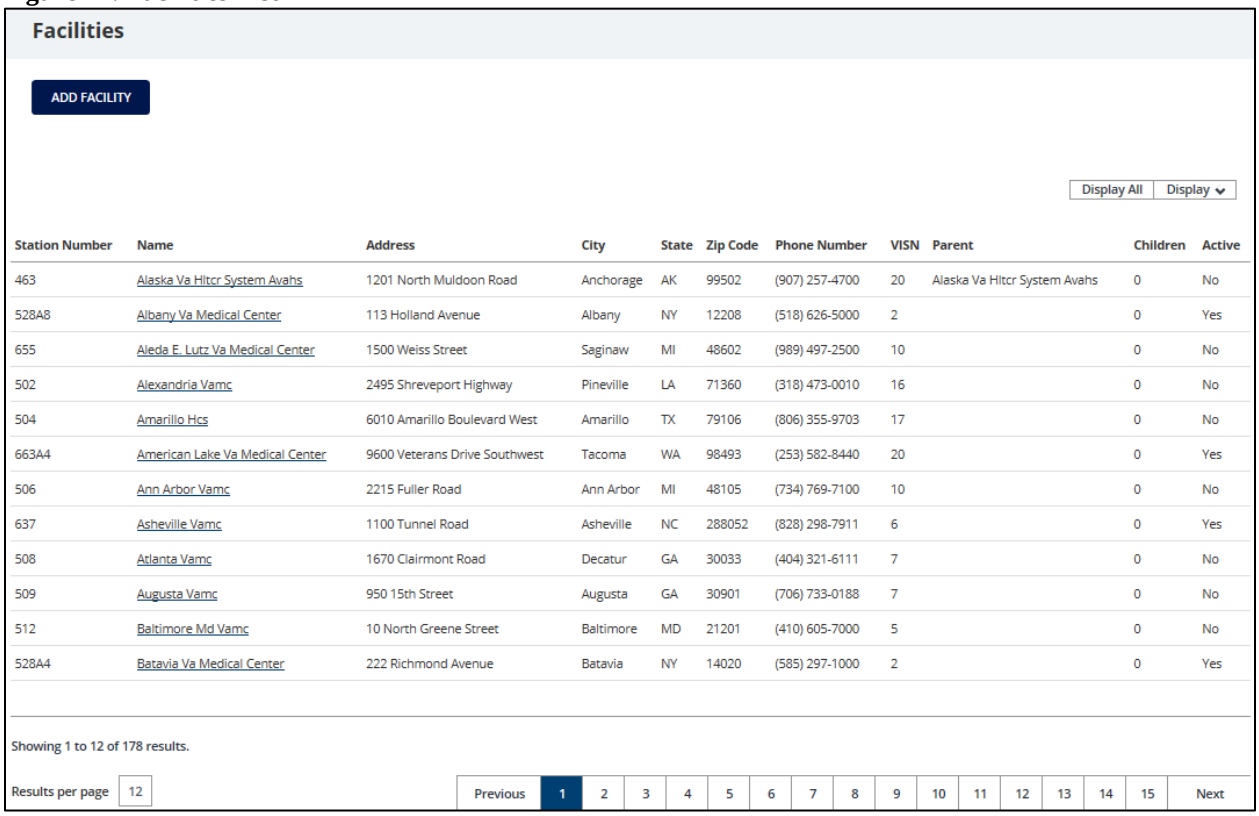
4.11. Admin Menu – View or Edit Facilities List

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

Prerequisite:

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

Figure 11: Facilities List



Facilities

ADD FACILITY

Display All | Display

Station Number	Name	Address	City	State	Zip Code	Phone Number	VISN	Parent	Children	Active
463	Alaska Va Hltcr System Avahs	1201 North Muldoon Road	Anchorage	AK	99502	(907) 257-4700	20	Alaska Va Hltcr System Avahs	0	No
528A8	Albany Va Medical Center	113 Holland Avenue	Albany	NY	12208	(518) 626-5000	2		0	Yes
655	Aleda E. Lutz Va Medical Center	1500 Weiss Street	Saginaw	MI	48602	(989) 497-2500	10		0	No
502	Alexandria Vamc	2495 Shreveport Highway	Pineville	LA	71360	(318) 473-0010	16		0	No
504	Amarillo Hcs	6010 Amarillo Boulevard West	Amarillo	TX	79106	(806) 355-9703	17		0	No
663A4	American Lake Va Medical Center	9600 Veterans Drive Southwest	Tacoma	WA	98493	(253) 582-8440	20		0	Yes
506	Ann Arbor Vamc	2215 Fuller Road	Ann Arbor	MI	48105	(734) 769-7100	10		0	No
637	Asheville Vamc	1100 Tunnel Road	Asheville	NC	288052	(828) 298-7911	6		0	Yes
508	Atlanta Vamc	1670 Clairmont Road	Decatur	GA	30033	(404) 321-6111	7		0	No
509	Augusta Vamc	950 15th Street	Augusta	GA	30901	(706) 733-0188	7		0	No
512	Baltimore Md Vamc	10 North Greene Street	Baltimore	MD	21201	(410) 605-7000	5		0	No
528A4	Batavia Va Medical Center	222 Richmond Avenue	Batavia	NY	14020	(585) 297-1000	2		0	Yes

Showing 1 to 12 of 178 results.

Results per page 12

Previous 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 Next

4.12. Welcome Menu – Access User Guide

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

Prerequisite:

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

Figure 12: Access User Guide

4.13. Welcome Menu – View, Add, or Remove Default Facility

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

Prerequisite:

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

Figure 13: Access User Preferences to Update Default Facility

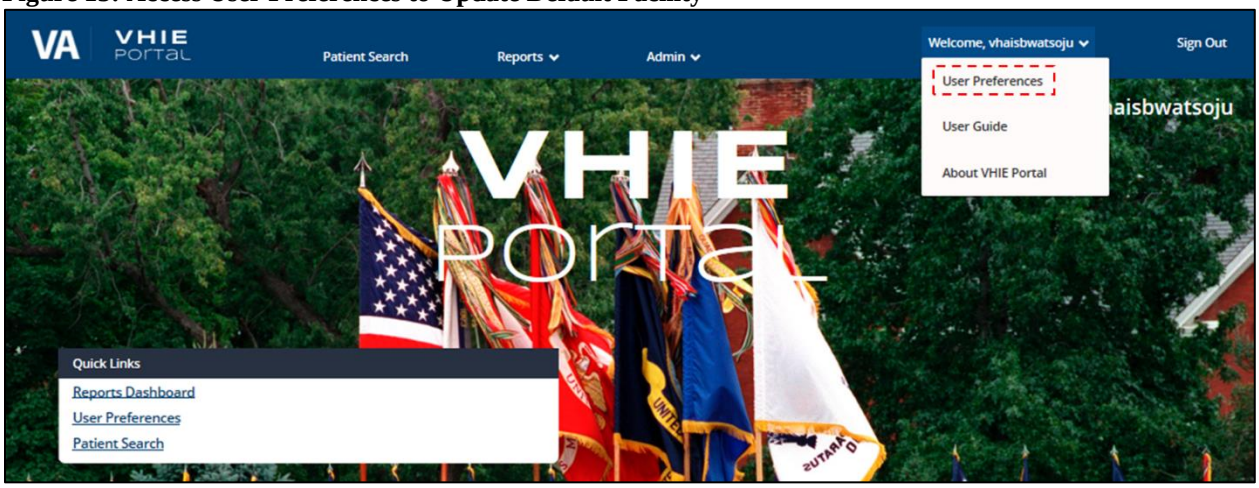
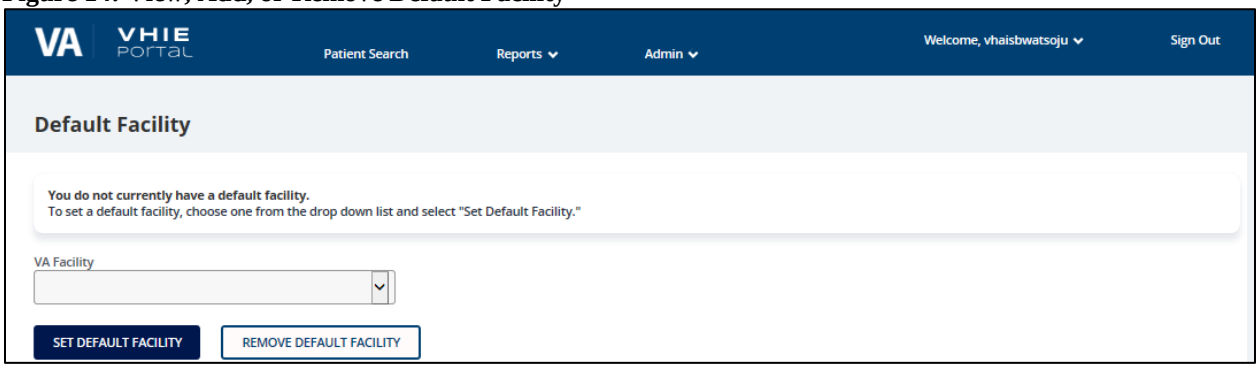


Figure 14: View, Add, or Remove Default Facility



4.14. Welcome Menu – View System Software Information

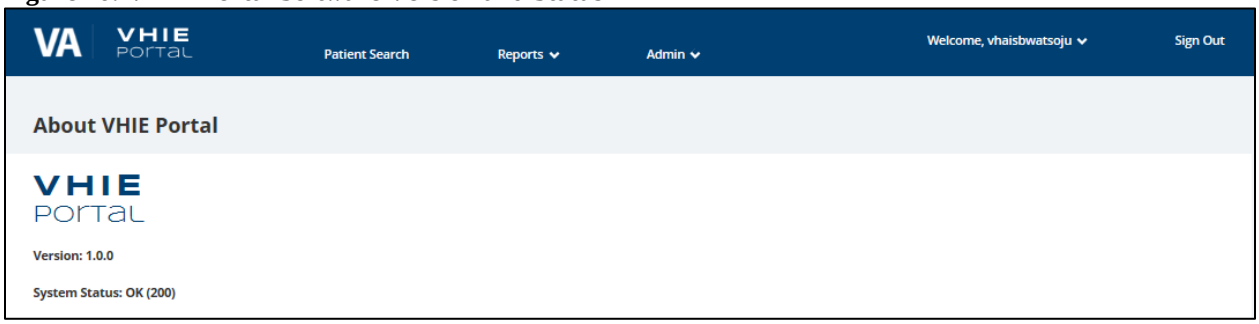
A VHIE user can view the system status and software version of the VHIE Portal by selecting "About VHIE Portal" from the welcome menu, under the username.

Prerequisite:

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

Figure 15: Access VHIE Portal Software Information

Figure 16: VHIE Portal Software Version and Status



5. Troubleshooting

5.1. Special Instructions for Error Correction

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

6. Acronyms and Abbreviations

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