

Veterans Health Information Exchange (VHIE) Portal

Build 3.1 VHIE Portal User Guide



Version 2.9
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Department of Veterans Affairs
Office of Information and Technology (OIT)

Revision History

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

Date	Revision	Description	Author
12/2019	2.9	Update Section 4.1 Patient Search to include expected response for loading an Inactive Patient for Build 3.1.	VHIE Agile Development
09/2019	2.8	Updated Section 5.1 Special Instructions for Error Correction and updated instructions for exporting to CSV and Save XML throughout the document.	VHIE Agile Development
08/2019	2.7	Updated additional language and labels for tables/figures.	VHIE Agile Development
08/2019	2.6	Updated based on PMO review.	VHIE Agile Development
08/2019	2.5	Updated UIs and content to reflect changes during Build 3.	VHIE Agile Development
06/11/2019	2.4	Updated content, tables, and figures to reflect Build 3 functionalities.	VHIE Agile Development
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 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) Program was 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. As part of the enhancement, HealthShare 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 a Patient's Consent, also known as the Patient's Participation Preferences (PPP) and the requests for generating CDA-type documents for selected veterans, as well as generate and display HIE and Consent reports. To improve user experience 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

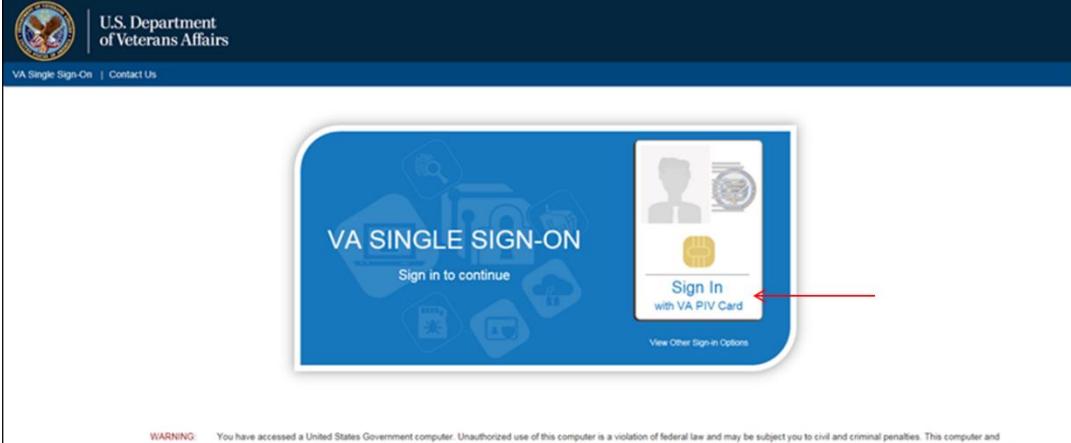
This section describes the steps for logging in and understanding the VHIE Portal functionalities.

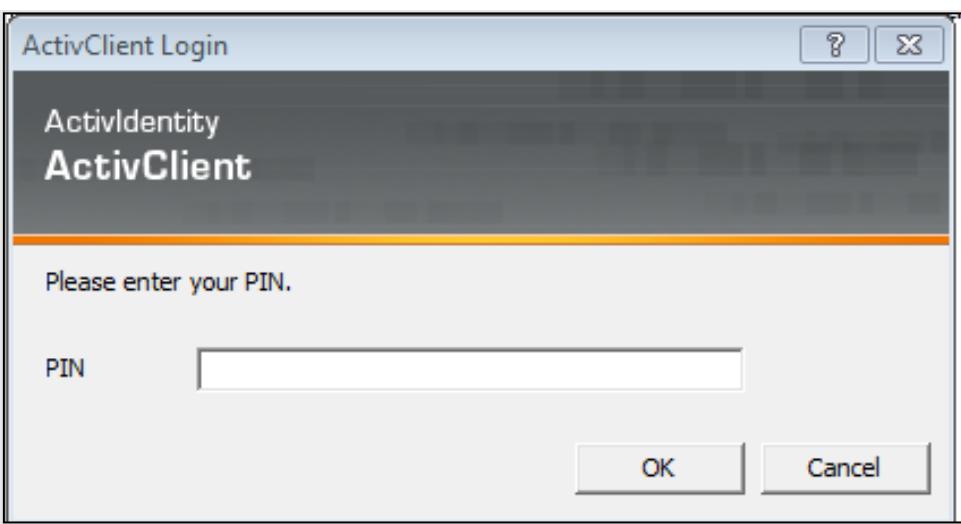
3.1. Log in via SSOi

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.	<p>Navigate to the VHIE Portal Login screen at [VHIE Portal Prod URL – TBD].</p> <p>Note: If presented with the website's security certificate error, click on “Continue to this website (not recommended)”.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;">  <p>There is a problem with this website's security certificate.</p> <hr/> <p>The security certificate presented by this website was issued for a different website's address.</p> <p>Security certificate problems may indicate an attempt to fool you or intercept any data you send to the server.</p> <p>We recommend that you close this webpage and do not continue to this website.</p> <p> <input checked="" type="checkbox"/> Click here to close this webpage. <input type="checkbox"/> Continue to this website (not recommended). <input type="checkbox"/> More information </p> </div>
2.	<p>Login using your PIV card.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;">  <p>WARNING: You have accessed a United States Government computer. Unauthorized use of this computer is a violation of federal law and may be subject you to civil and criminal penalties. This computer and automated systems which run on it, are monitored. Individuals are not guaranteed privacy while using government computers and should, therefore, not expect it. Communications made using this system may be disclosed as allowed by federal law.</p> </div>

Step	Action
3.	<p>Select the appropriate certificate and click OK.</p> <p>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.</p> 
4.	<p>Enter the PIN associated with your PIV card and click OK.</p> 

Step	Action
5.	<p>Arrive at the VHIE Portal Landing Page.</p> 

3.2. Understanding the Functionalities

The VHIE Portal provides the following functionalities:

- VHIE Portal Landing Page
- Patient Search
- View Patient Demographic Details
- Participation Preference: Patient Not Participating
- Participation Preference: Patient Re-participate
- Deceased Patient Notification Message
- View or Add Patient Comments
- Generate Documents (CDA-type Health Documents)
- Generate Patient-centric Sent Documents
- Generate Patient-centric Accounting of Disclosures Report
- View Patient's VA Treatment Facilities
- Search Menu – Return to Patient Search
- Report Menu – Consent Activity Dashboard
- Report Menu – User Activity Dashboard
- Report Menu – Detailed HIE and Consent Reports
- Report Menu – Summary HIE and Consent Reports
- Admin Menu – View or Modify Partner Organization(s) List
- Admin Menu – View or Modify Facilities List

- Welcome Menu – Set or Update User’s Default Facility
- Welcome Menu – Access User Guide
- 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

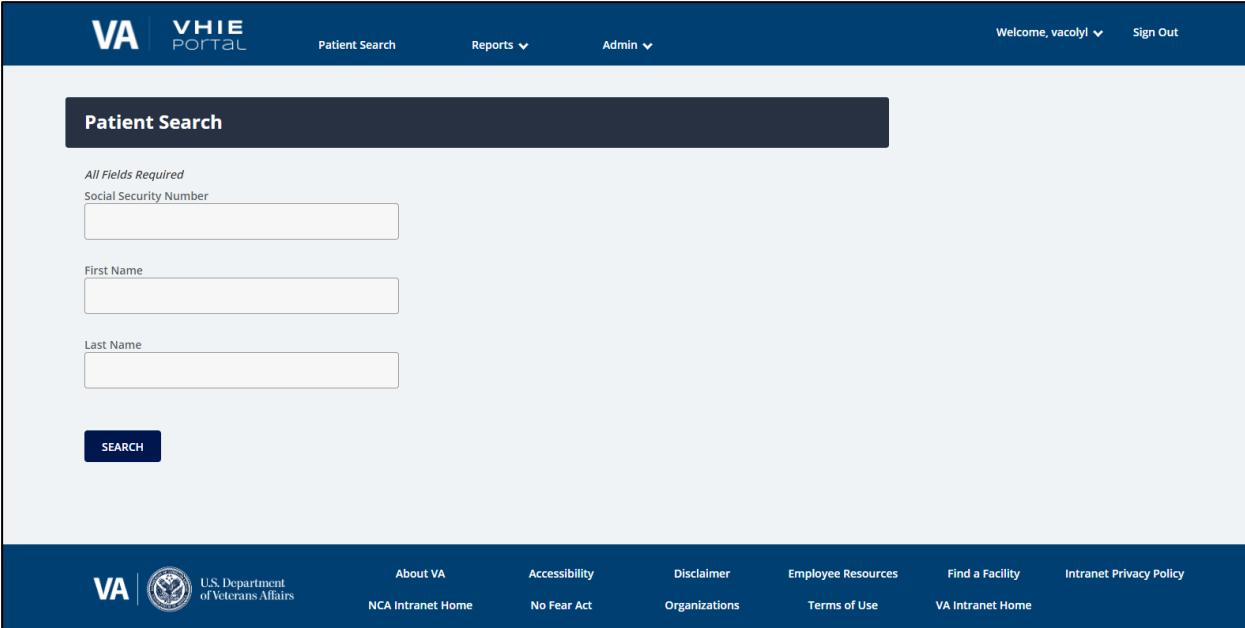
Consult your supervisor or the VA Help Desk if you need help meeting any of the above conditions.

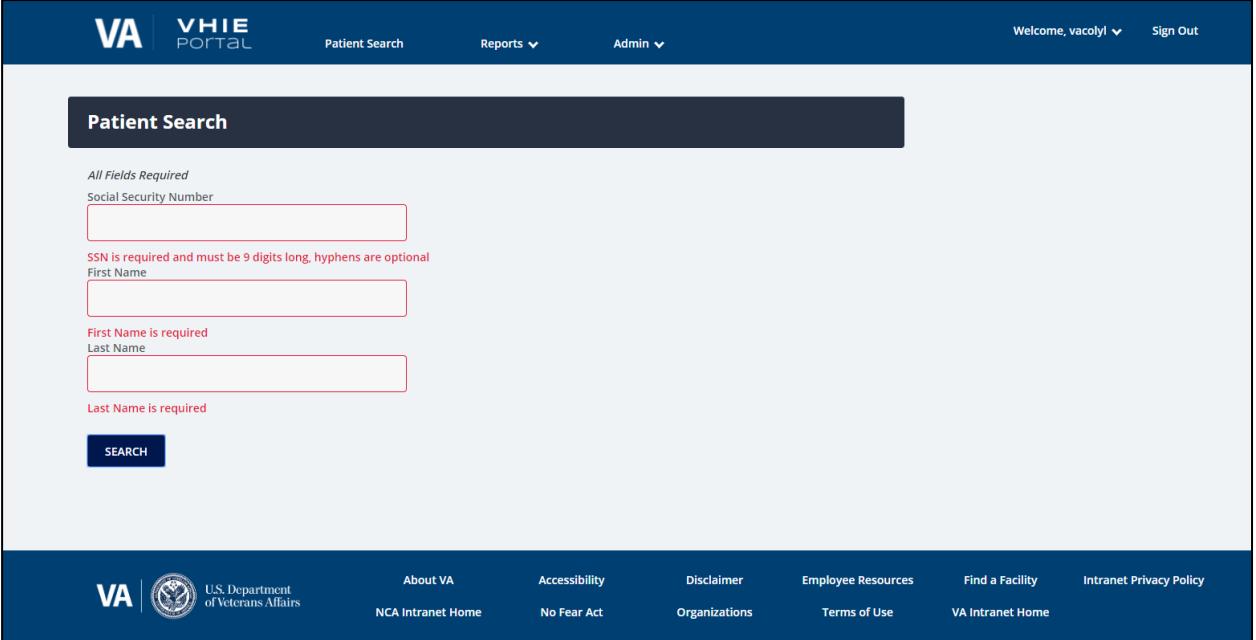
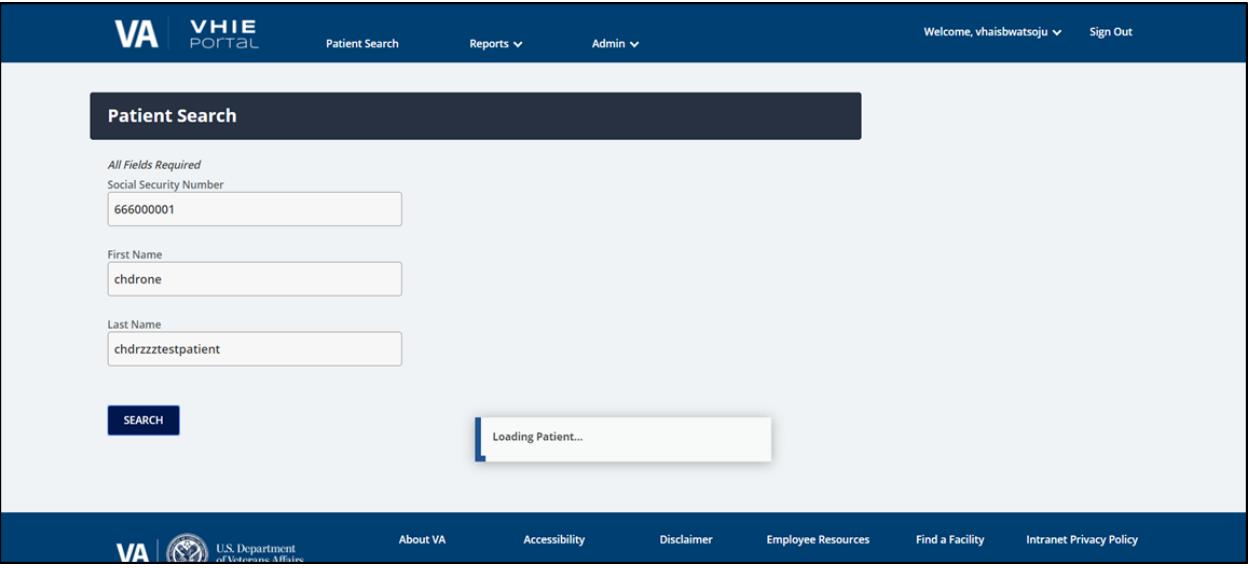
4.1. Patient Search

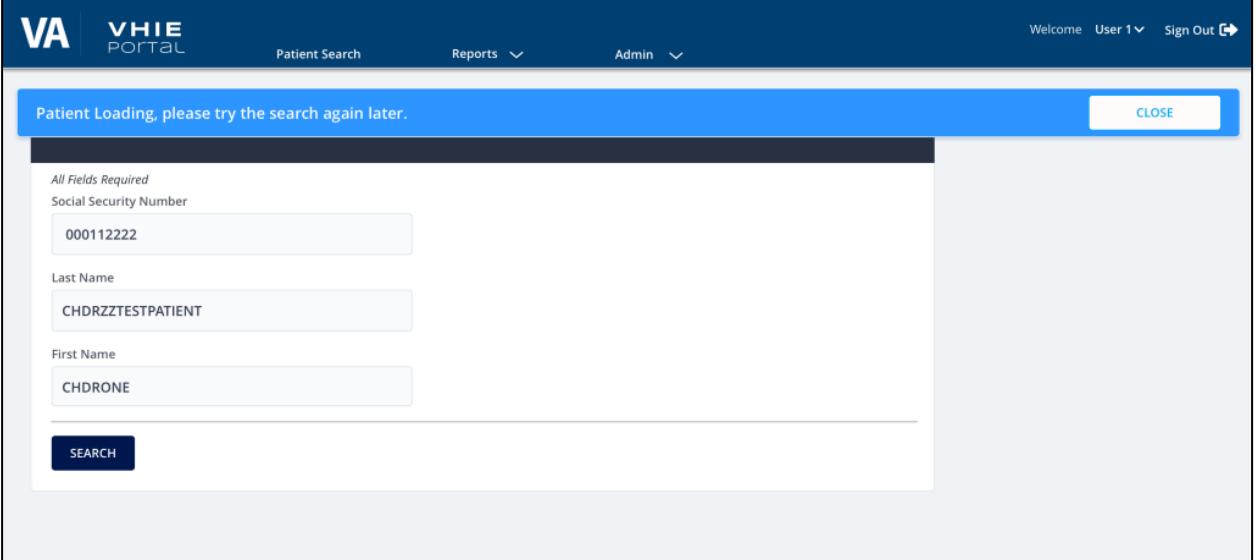
The Patient Search allows for a VHIE user to search by the Patient's SSN, First Name, and Last Name.

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

Table 2: Patient Search

Step	Action
1.	<p>Complete the SSN, First Name, Last Name fields, then click Search.</p> <p>Note: The SSN, First Name, and Last Name fields are all required fields. SSN field accepts numeric characters with and without dashes (e.g. xxx-xxx-xxxx and xxxxxxxxxxxx).</p> 

Step	Action
2.	<p>Form validation is enforced to ensure that users complete each field in the correct format.</p>  <p>The screenshot shows the Patient Search page with three validation errors:</p> <ul style="list-style-type: none"> Social Security Number: "SSN is required and must be 9 digits long, hyphens are optional" First Name: "First Name is required" Last Name: "Last Name is required" <p>The "SEARCH" button is visible at the bottom left of the search form.</p>
3.	<p>A progress bar will display to indicate that a Patient Search is processing.</p>  <p>The screenshot shows the Patient Search page with the following input values:</p> <ul style="list-style-type: none"> Social Security Number: 666000001 First Name: chdrone Last Name: chdrzzztestpatient <p>A progress bar labeled "Loading Patient..." is displayed below the search form, indicating the search is in progress.</p>

Step	Action
4.	<p>If the Patient's record has not been loaded from the Legacy system, a notification message will display for the user to try the search again later.</p> 

4.2. Patient Detail Summary

After retrieving a record from a Patient Search, the VHIE user will be able to view the Patient's demographic details and perform various Patient-centric tasks, depending on the role(s) assigned to the VHIE user.

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 Demographic Details

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

Figure 1: Patient Demographic Details

The screenshot shows the VHIE Portal interface. At the top, there is a navigation bar with links for Patient Search, Reports, Admin, Welcome, and Sign Out. Below the navigation bar, a red dashed box highlights the "Patient Detail" section. This section contains a table with patient information:

Last Name	First Name	MI	Gender	Date of Birth	Multiple	SSN	ICN	Address	Phone	Preferred Facility
Nwhinzzztestpatient	Nwhintwo	M		1982/01/02	No	666100002	1012638925V204624	1200 TEST STREET HELENA, AL 35080	(989)898-9898	983 CHYSHR

Below the table are several functional tabs: Consent Status, Comments, Generate Documents, Recent Activity, Accounting of Disclosures, and Facilities.

The "Participation" section indicates that the patient has opted-in to share health information. The "Social Security Administration (SSA)" section states that the patient has NOT authorized the release of protected health information to the SSA.

A blue "OPT-OUT" button is located in the participation section.

At the bottom of the page, there is a table titled "Consent Directive" with columns for Consent Directive, Purpose, Status, Authorization / Revocation, Entered, Signature, Inactivation, Expiration, Comments, and User Id. The table lists three entries:

Consent Directive	Purpose	Status	Authorization / Revocation	Entered	Signature	Inactivation	Expiration	Comments	User Id
➤ eHealth Exchange Re-participate	TREATMENT		Re-participated in Sharing PHI with All Providers and Organizations	2019/07/31 15:16:49 CST	2019/07/31			2019/07/31 15:16:49 CST dsullivan: opting in to test PD with Kaiser	
➤ SSA Authorization	COVERAGE	Inactive	Authorized access to Social Security Administration	2019/07/09 09:49:10 CST	2019/07/09		2020/07/09		vhie_operator
➤ SSA Revocation	COVERAGE		Revoked access to Social Security Administration	2019/07/09 09:45:33 CST	2019/05/02				vhie_operator

4.2.2. Patient-centric Functions

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

- Consent Status
- Comments
- Generate Documents (CDA-type Health Documents)
- Recent Activity (Patient-centric Sent Documents)
- Accounting of Disclosures (Patient-centric Accounting of Disclosures)
- Facilities (Patient's VA Treatment Facilities)

Figure 2: Patient-centric Info Tabs

The screenshot shows the VA VHIE Portal interface. At the top, there is a navigation bar with links for Patient Search, Reports, Admin, Welcome, and Sign Out. Below the navigation bar, the main content area is titled "Patient Detail". It displays basic patient information: Last Name (Nwhinzzztestpatient), First Name (Nwhintwo), MI (M), Gender (Male), Date of Birth (1982/01/02), Multiple (No), SSN (666100002), ICN (1012638925V204624), Address (1200 TEST STREET HELENA, AL 35080), Phone ((989)898-9898), and Preferred Facility (983 CHYSHR). Below this information is a horizontal menu bar with tabs: Consent Status, Comments, Generate Documents, Recent Activity, Accounting of Disclosures, and Facilities. The "Consent Status" tab is highlighted with a red dashed border. Under the "Consent Status" tab, there are two sections: "Participation" and "Social Security Administration (SSA)". The "Participation" section contains a message stating that the patient has been automatically opted-in to share health information or has a prior authorization to release health information through the eHealth Exchange. A blue "OPT-OUT" button is present. The "Social Security Administration (SSA)" section states that the patient has not authorized the release of protected health information to the SSA. Below these sections is a table titled "Dates" with columns for Consent Directive, Purpose, Status, Authorization / Revocation, Entered, Signature, Inactivation, Expiration, Comments, and User Id. The table lists three entries:

Consent Directive	Purpose	Status	Authorization / Revocation	Entered	Signature	Inactivation	Expiration	Comments	User Id
➤ eHealth Exchange Re-participate	TREATMENT	Active	Re-participated in Sharing PHI with All Providers and Organizations	2019/07/31 15:16:49 CST	2019/07/31			2019/07/31 15:16:49 CST dsullivan: opting in to test PD with Kaiser	dsullivan
➤ SSA Authorization	COVERAGE	Inactive	Authorized access to Social Security Administration	2019/07/09 09:49:10 CST	2019/07/09		2020/07/09		vhie_operator
➤ SSA Revocation	COVERAGE	Revoked	Revoked access to Social Security Administration	2019/07/09 09:45:33 CST	2019/05/02				vhie_operator

4.3. Consent Status Tab

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

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.

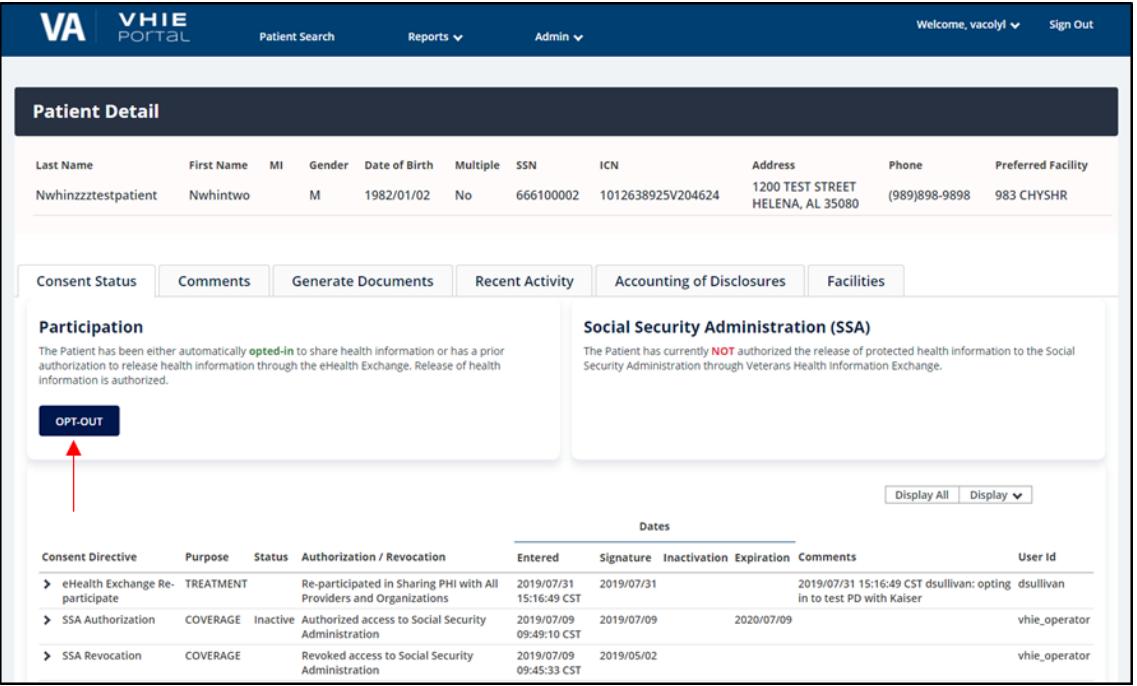
4.3.1. Participation Preference: Opt-Out of Sharing (Not Participating)

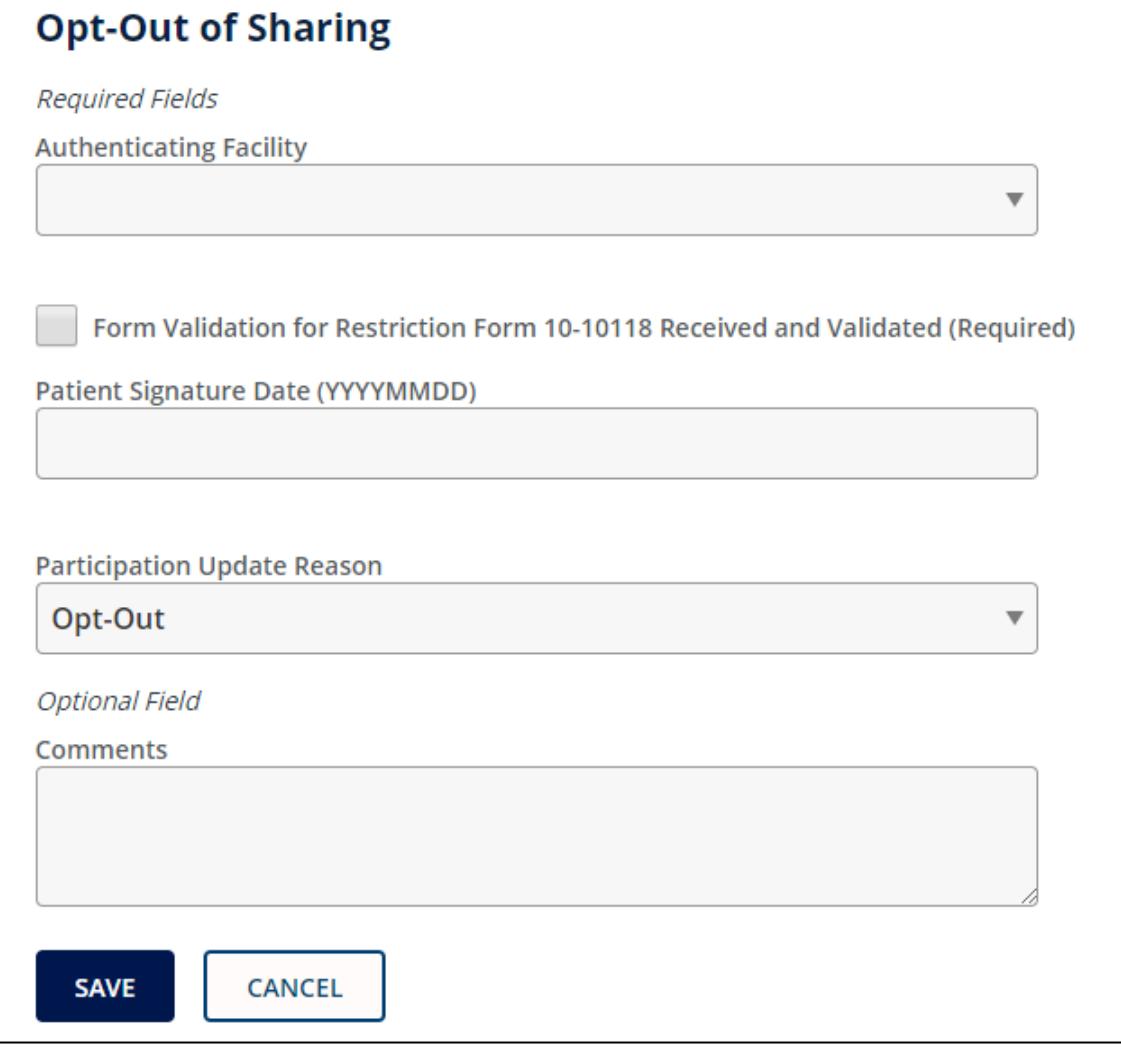
If the Patient is currently participating in the sharing of Health information, a VHIE user can take the following steps to update the Patient's consent status so that the Patient is opted-out of sharing.

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 3: Patient Opt-out of Sharing

Step	Action																																																																				
1.	<p>If the veteran is currently participating in sharing, there will be an Opt-Out button under the Participation Section. Select the Opt-Out button to open the participation form and fill out the required information.</p>  <table border="1" data-bbox="350 982 1428 1129"> <thead> <tr> <th colspan="7">Consent Directive</th> <th>Purpose</th> <th>Status</th> <th colspan="2">Authorization / Revocation</th> <th>Entered</th> <th>Signature</th> <th>Inactivation</th> <th>Expiration</th> <th>Comments</th> <th>User Id</th> </tr> </thead> <tbody> <tr> <td colspan="7">> eHealth Exchange Re-participate</td> <td>TREATMENT</td> <td>Re-participated in Sharing PHI with All Providers and Organizations</td> <td>2019/07/31 15:16:49 CST</td> <td>2019/07/31 15:16:49 CST</td> <td></td> <td>2019/07/31 15:16:49 CST dsullivan: opting in to test PD with Kaiser</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="7">> SSA Authorization</td> <td>COVERAGE</td> <td>Inactive</td> <td>Authorized access to Social Security Administration</td> <td>2019/07/09 09:49:10 CST</td> <td>2019/07/09 09:49:10 CST</td> <td>2020/07/09</td> <td></td> <td></td> <td></td> <td>vhie_operator</td> </tr> <tr> <td colspan="7">> SSA Revocation</td> <td>COVERAGE</td> <td></td> <td>Revoked access to Social Security Administration</td> <td>2019/07/09 09:45:33 CST</td> <td>2019/05/02</td> <td></td> <td></td> <td></td> <td></td> <td>vhie_operator</td> </tr> </tbody> </table>	Consent Directive							Purpose	Status	Authorization / Revocation		Entered	Signature	Inactivation	Expiration	Comments	User Id	> eHealth Exchange Re-participate							TREATMENT	Re-participated in Sharing PHI with All Providers and Organizations	2019/07/31 15:16:49 CST	2019/07/31 15:16:49 CST		2019/07/31 15:16:49 CST dsullivan: opting in to test PD with Kaiser					> SSA Authorization							COVERAGE	Inactive	Authorized access to Social Security Administration	2019/07/09 09:49:10 CST	2019/07/09 09:49:10 CST	2020/07/09				vhie_operator	> SSA Revocation							COVERAGE		Revoked access to Social Security Administration	2019/07/09 09:45:33 CST	2019/05/02					vhie_operator
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Step	Action
2.	<p>Complete the required information fields and click the Save button to update the Veteran's participation status.</p>  <p>Opt-Out of Sharing</p> <p><i>Required Fields</i></p> <p>Authenticating Facility</p> <p><input type="text"/></p> <p><input checked="" type="checkbox"/> Form Validation for Restriction Form 10-10118 Received and Validated (Required)</p> <p>Patient Signature Date (YYYYMMDD)</p> <p><input type="text"/></p> <p>Participation Update Reason</p> <p>Opt-Out</p> <p><i>Optional Field</i></p> <p>Comments</p> <p><input type="text"/></p> <p>SAVE CANCEL</p>

4.3.2. Participation Preference: Patient Re-participate in Sharing

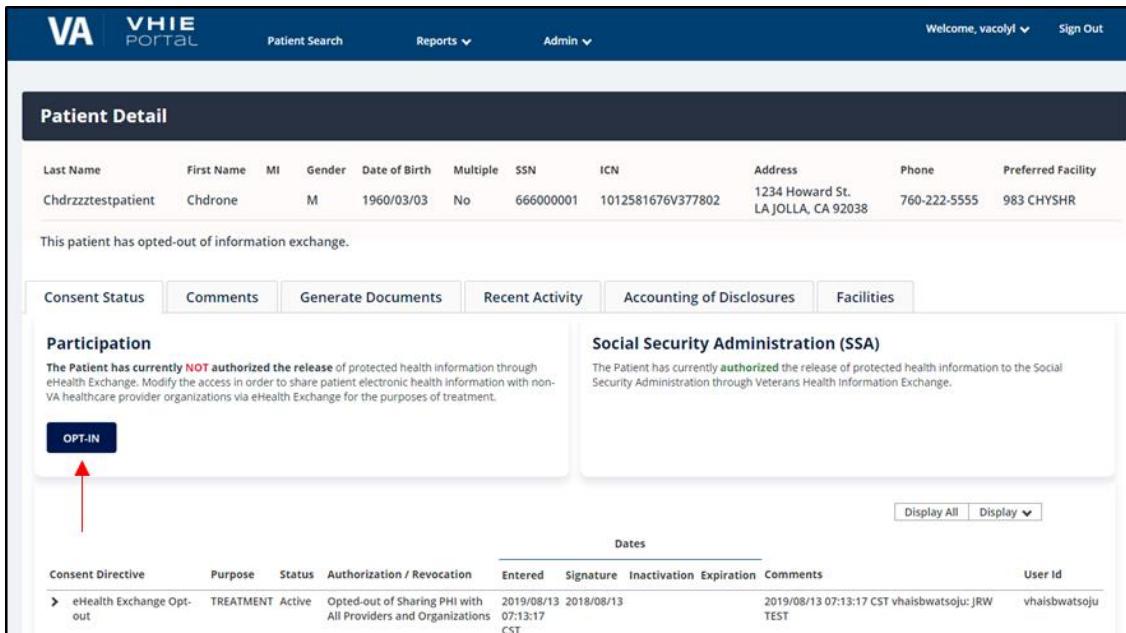
If the Patient is currently opted-out of sharing, a VHIE user can take the following steps to change the Patient's consent status so that the Patient is opted-in for sharing.

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 has an explicitly opted-out (not participating) preference in the legacy system, the opt-out preference is honored in HealthShare. A message will also display under the Patient's Detail section to notify the user of the Patient's Not Participating preference.

Table 4: Patient Re-participate in Sharing

Step	Action
1.	<p>If the veteran is currently not participating in sharing, there will be an Opt-In button under the Participation Section. Select the Opt-In button to open the participation form and fill out the required information.</p>  <p>The screenshot shows the VA VHIE PORTAL interface. In the top navigation bar, there are links for Patient Search, Reports, Admin, Welcome, vacoly, and Sign Out. The main content area is titled "Patient Detail". Below this, there is a table with patient information: Last Name (Chdrzzztestpatient), First Name (Chdrone), MI (M), Gender (Male), Date of Birth (1960/03/03), Multiple (No), SSN (6666000001), ICN (1012581676V377802), Address (1234 Howard St. LA JOLLA, CA 92038), Phone (760-222-5555), and Preferred Facility (983 CHYSHR). A message below the table states, "This patient has opted-out of information exchange." Below the table are tabs for Consent Status, Comments, Generate Documents, Recent Activity, Accounting of Disclosures, and Facilities. Under the "Participation" heading, it says, "The Patient has currently NOT authorized the release of protected health information through eHealth Exchange. Modify the access in order to share patient electronic health information with non-VA healthcare provider organizations via eHealth Exchange for the purposes of treatment." An "OPT-IN" button is visible. To the right, under "Social Security Administration (SSA)", it says, "The Patient has currently authorized the release of protected health information to the Social Security Administration through Veterans Health Information Exchange." At the bottom, there is a table titled "Consent Directive" with columns for Consent Directive, Purpose, Status, Authorization / Revocation, Entered, Signature, Inactivation, Expiration, Comments, and User ID. One row is shown: "eHealth Exchange Opt-out" with Purpose "TREATMENT", Status "Active", Authorization "Opted-out of Sharing PHI with All Providers and Organizations", Entered "2019/08/13 07:13:17 CST", Signature "vhalisbwatsoju:JRWT", Inactivation "2018/08/13 07:13:17 CST", Expiration "2019/08/13 07:13:17 CST", Comments "TEST", and User ID "vhalisbwatsoju".</p>

Step	Action
2.	<p>Complete the required information fields, then click the Save button to update the Veteran's participation status.</p> <div data-bbox="349 340 822 386" style="background-color: #e0f2f1; padding: 5px; font-size: 1.2em; font-weight: bold;">Reparticipate in Sharing</div> <p><i>Required Fields</i></p> <p>Authenticating Facility</p> <div style="border: 1px solid #ccc; height: 40px; margin-bottom: 10px;"></div> <p><input checked="" type="checkbox"/> Form Validation for Restriction Form 10-10117 Received and Validated (Required)</p> <p>Patient Signature Date (YYYYMMDD)</p> <div style="border: 1px solid #ccc; height: 40px; margin-bottom: 10px;"></div> <p>Participation Update Reason</p> <p>Reparticipate</p> <div style="border: 1px solid #ccc; height: 100px; margin-bottom: 10px;"></div> <p><i>Optional Field</i></p> <p>Comments</p> <div style="border: 1px solid #ccc; height: 100px; margin-bottom: 10px;"></div> <div style="display: flex; justify-content: space-around;"> SAVE CANCEL </div>

4.3.3. Deceased Patient Notification Message

If the Patient is deceased, a message will display in the Patient Detail Section and Participation Section to notify the user that the Patient is deceased.

Note: If the deceased Patient had a Participate in Sharing Preference for Treatment, this preference will be honored for a period of six (6) months from the date of death.

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 3: Deceased Veteran Notification Message

The screenshot shows the VA VHIE Portal interface. At the top, there is a navigation bar with the VA logo, 'VHIE PORTAL', 'Patient Search', 'Reports', 'Admin', 'Welcome, vacoly!', and 'Sign Out'. Below the navigation bar, a banner displays the message: '2019/06/17: Patient is Deceased, health information may no longer be shared electronically through eHealth Exchange.' A table follows, showing patient details: Last Name (Nwhinzztestpatient), First Name (Nwhinsix), MI (M), Gender (Male), Date of Birth (1986/01/01), Multiple (No), SSN (666100006), ICN (1012646102V272429), Address (), Phone (205-111-6666), and Preferred Facility (N/A). Below the table is a row of buttons: 'Consent Status' (selected), 'Comments', 'Generate Documents', 'Recent Activity', 'Accounting of Disclosures', and 'Facilities'. Under the 'Consent Status' tab, there is a section titled 'Participation' with the message: '2019/06/17: Patient is Deceased, health information may no longer be shared electronically through eHealth Exchange. Note: Health information for this record may be shared for six (6) months from the date of death (2019/12/17).' To the right, under the 'Social Security Administration (SSA)' section, it says: 'The Patient has currently NOT authorized the release of protected health information to the Social Security Administration through Veterans Health Information Exchange.'

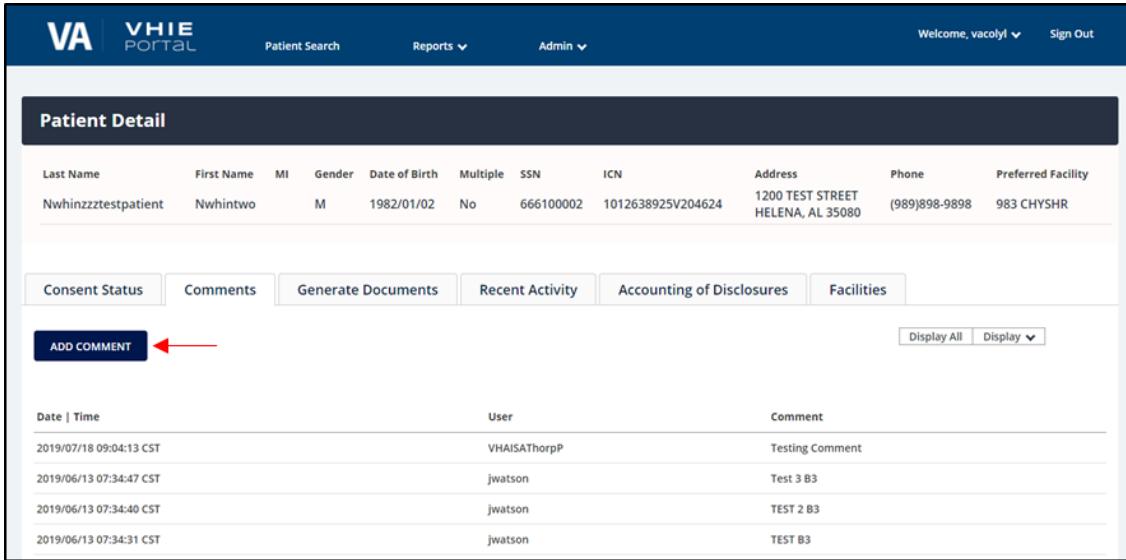
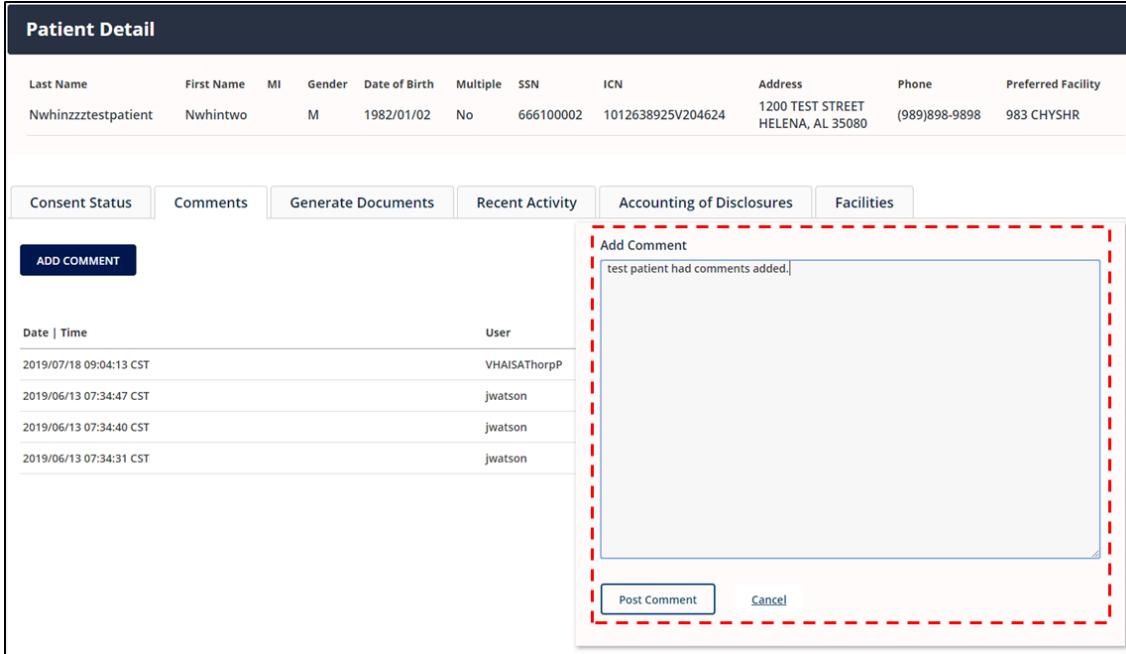
4.4. Comments Tab

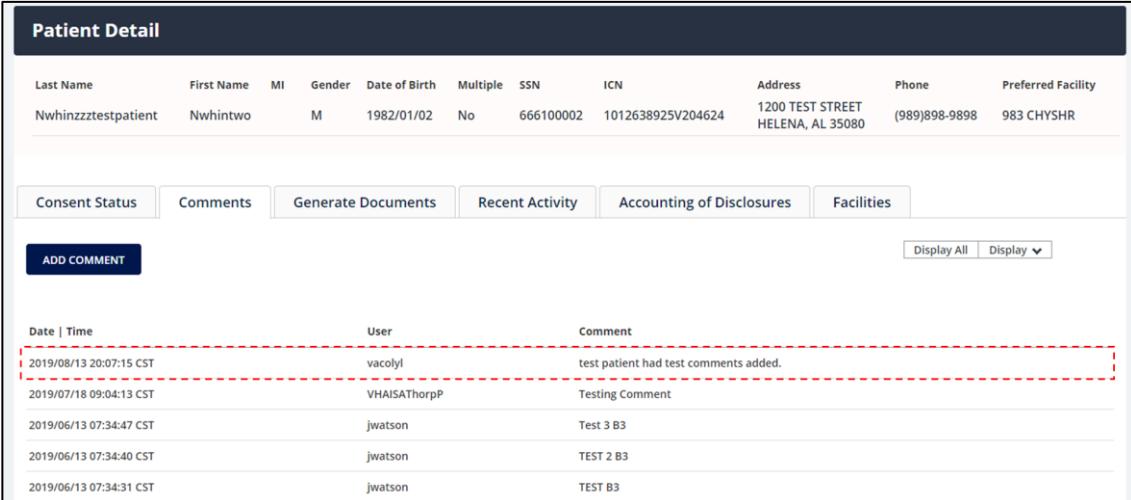
A VHIE user can select the Comments Tab to view or add general comments about the Patient.

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 5: View/Add Patient Comments

Step	Action
1.	<p>To add a comment, under the Comments Tab, select “Add Comment”.</p> 
2.	<p>Complete the Add Comment field and click Post Comment button to submit comment.</p> 

Step	Action																		
3.	<p>The most current comment will display as the top comment.</p> <p>Note: Comments posted in this area are only viewable in VHIE Portal.</p>  <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Date Time</th> <th>User</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>2019/08/13 20:07:15 CST</td> <td>vacoly</td> <td>test patient had test comments added.</td> </tr> <tr> <td>2019/07/18 09:04:13 CST</td> <td>VHAISAThorP</td> <td>Testing Comment</td> </tr> <tr> <td>2019/06/13 07:34:47 CST</td> <td>jwatson</td> <td>Test 3 B3</td> </tr> <tr> <td>2019/06/13 07:34:40 CST</td> <td>jwatson</td> <td>TEST 2 B3</td> </tr> <tr> <td>2019/06/13 07:34:31 CST</td> <td>jwatson</td> <td>TEST B3</td> </tr> </tbody> </table>	Date Time	User	Comment	2019/08/13 20:07:15 CST	vacoly	test patient had test comments added.	2019/07/18 09:04:13 CST	VHAISAThorP	Testing Comment	2019/06/13 07:34:47 CST	jwatson	Test 3 B3	2019/06/13 07:34:40 CST	jwatson	TEST 2 B3	2019/06/13 07:34:31 CST	jwatson	TEST B3
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2019/06/13 07:34:40 CST	jwatson	TEST 2 B3																	
2019/06/13 07:34:31 CST	jwatson	TEST B3																	

4.5. Generate Documents Tab

A VHIE user can select the Generate Documents Tab in the Patient Detail page to generate the CCD v1.1, CCD v2.1, C32, C62, or Single Encounter Summary (SES) documents.

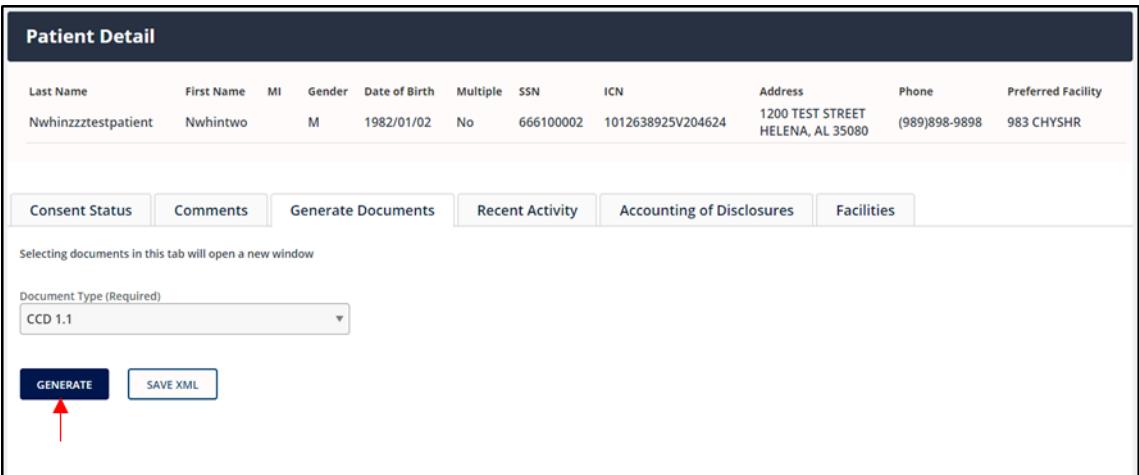
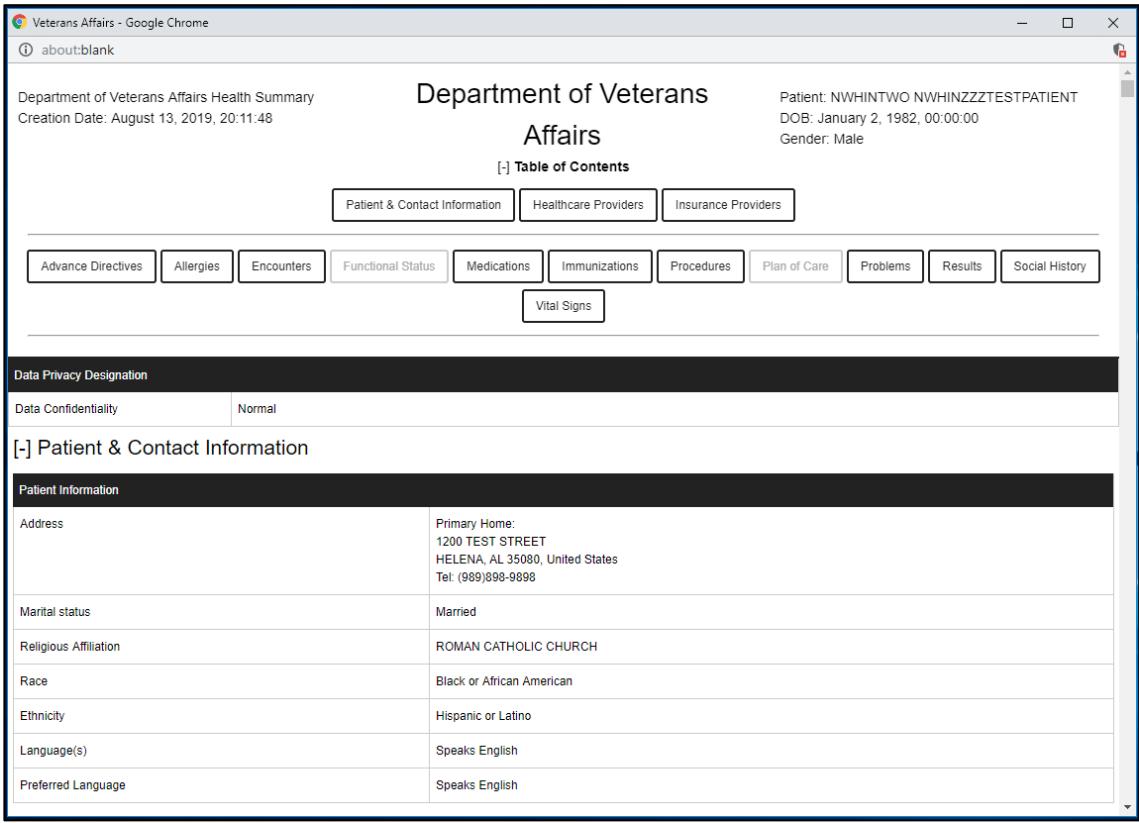
Prerequisite:

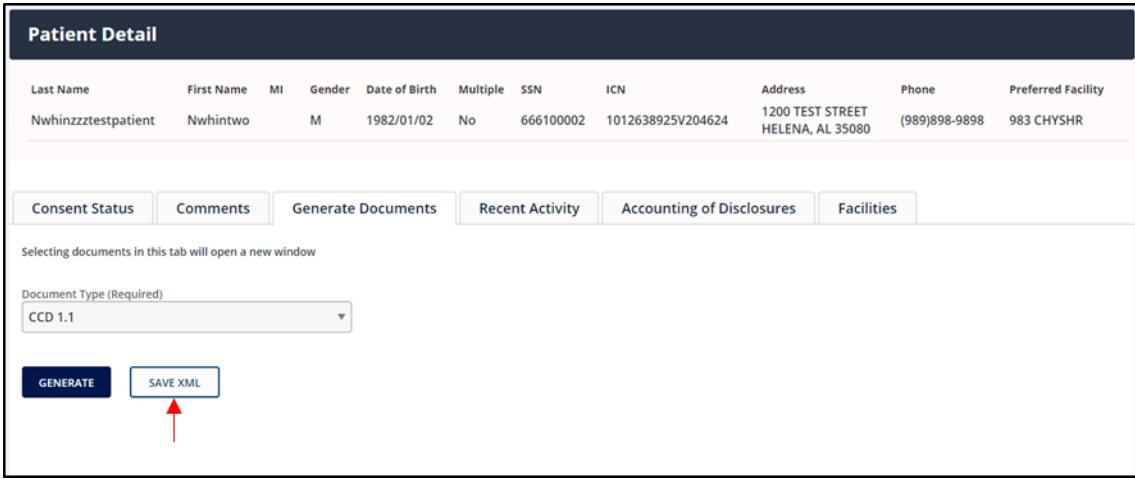
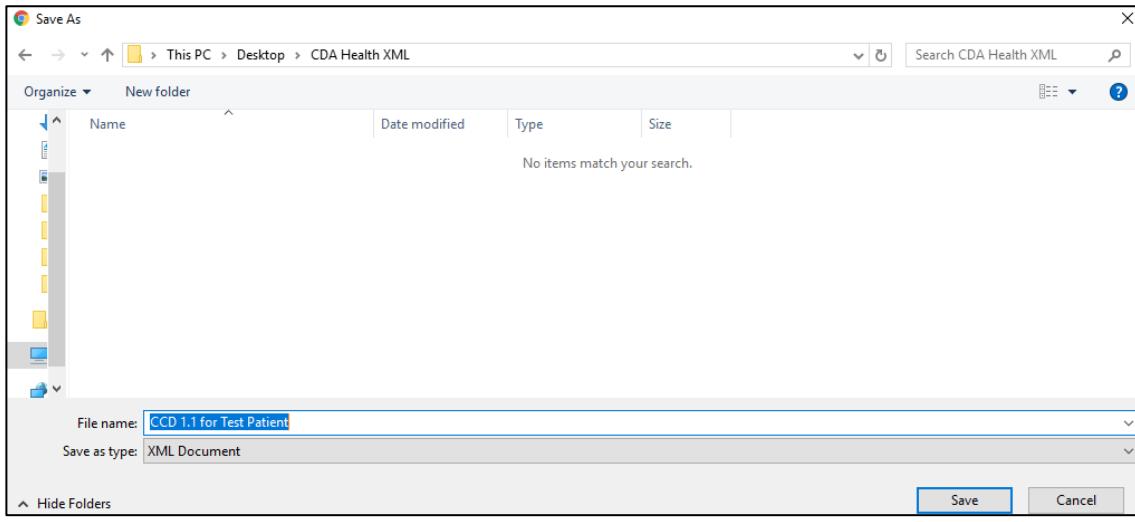
- The user has logged in via SSOi or another VA-approved method for authentication.
- The user has successfully retrieved a record from a Patient Search.

Note:

- 1) When generating a CCD v1.1, CCD v2.1, or C32, the artifact is generated in a new browser window.
- 2) When generating a C62 or SES, the results may return multiple documents and the user can choose which C62 or SES documents to view.
- 3) 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.
 - a. If generating a C62, use the Google Chrome web browser for best result. Contents of the C62 text note are base64 encoded, requiring the browser to translate the data link URL, which IE is not doing for the C62.
- 4) 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.

Table 6: Generate CCD 1.1, CCD 2.1, and C32

Step	Action
<p>1.</p> <p>Under the Generate Documents Tab, select either CCD 1.1, CCD 2.1, or C32 as the Document Type and click Generate.</p> 	<p>Selecting documents in this tab will open a new window</p> <p>Document Type (Required)</p> <p>CCD 1.1</p> <p>GENERATE SAVE XML</p>
<p>2.</p> <p>If available, the selected health document will generate in a new browser window.</p> 	

Step	Action
3.	<p>To download either the CCD 1.1, CCD 2.1, or C32 as an XML, select the document under the Document Type field and click Save XML.</p> 
4.	<p>The user will be prompted to Save the file as an XML Document. Select the appropriate save location and click Save.</p> 

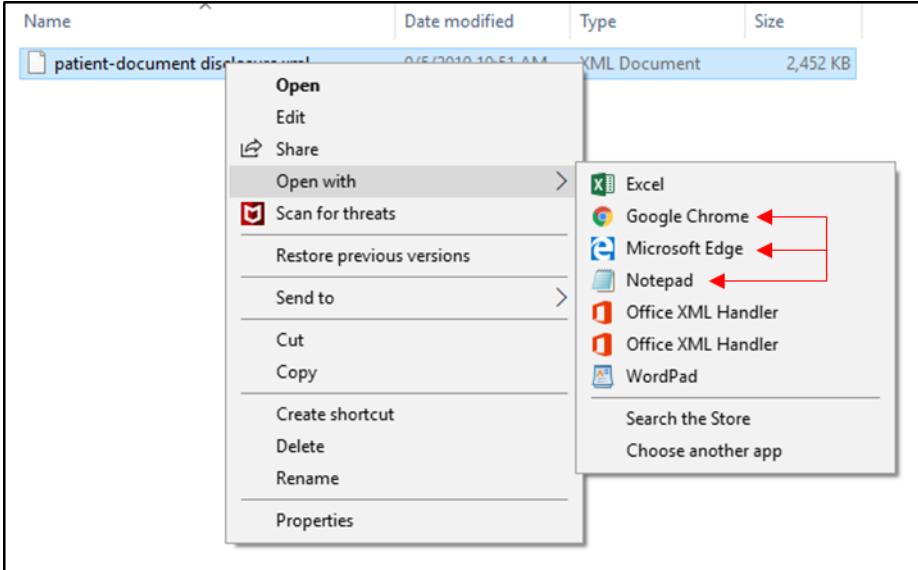
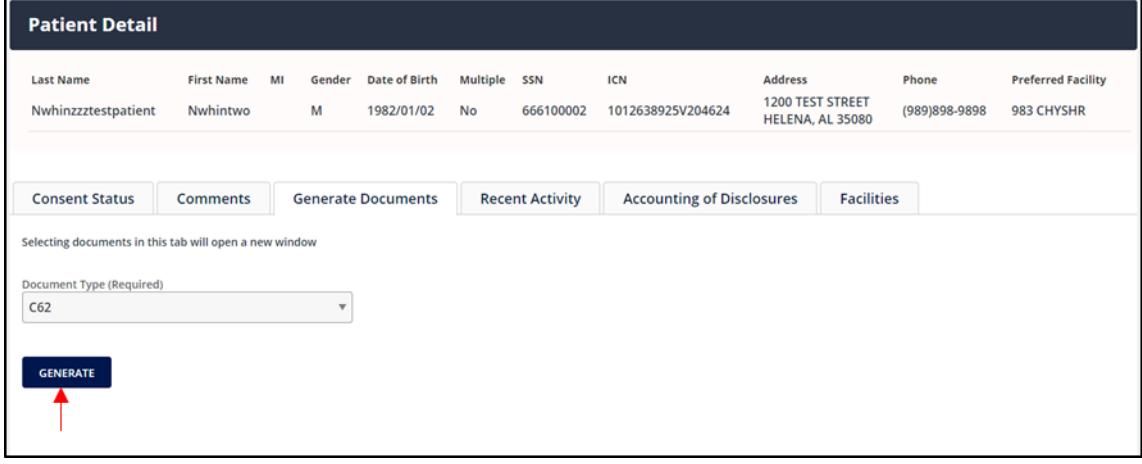
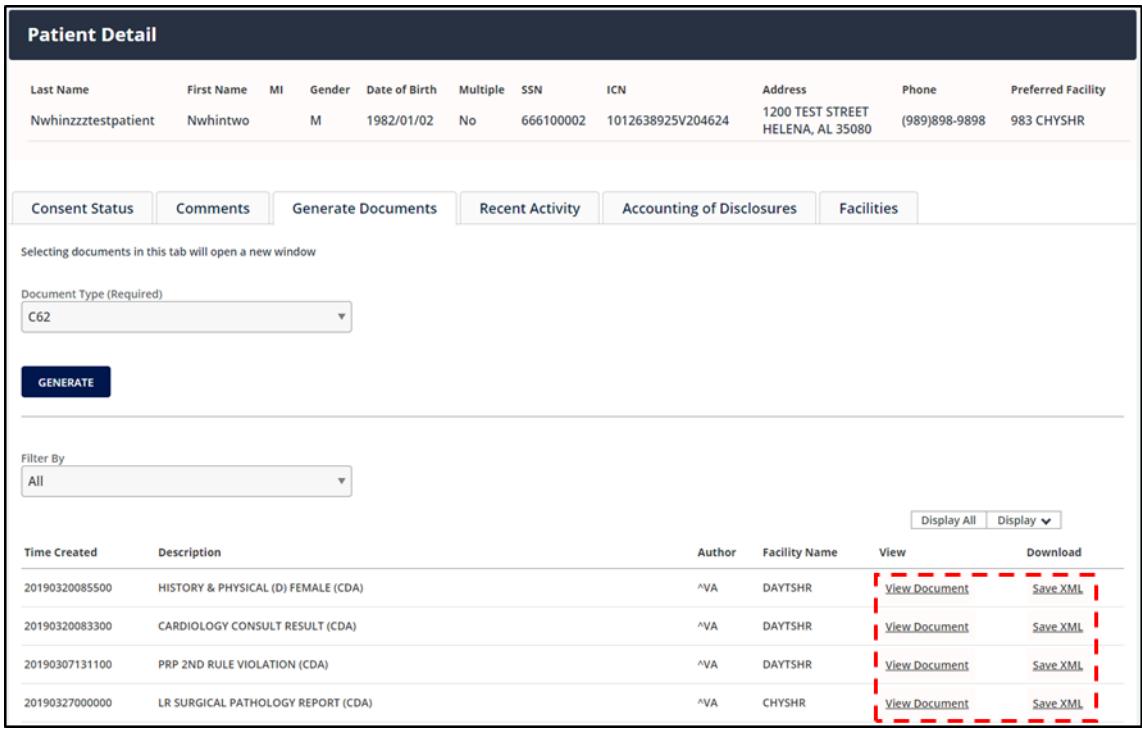
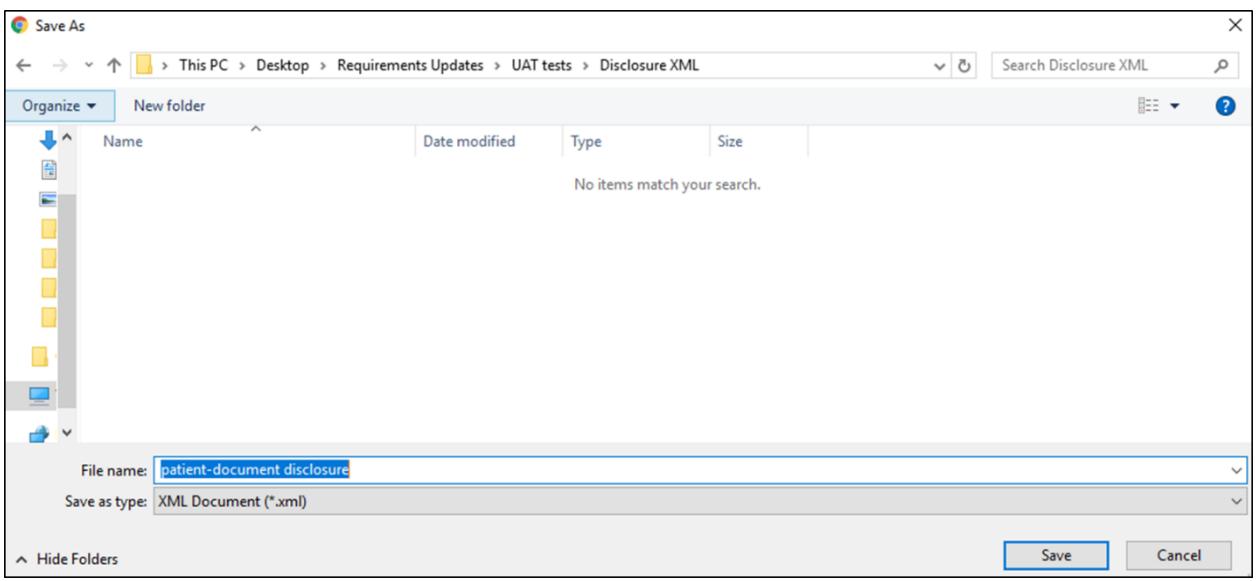
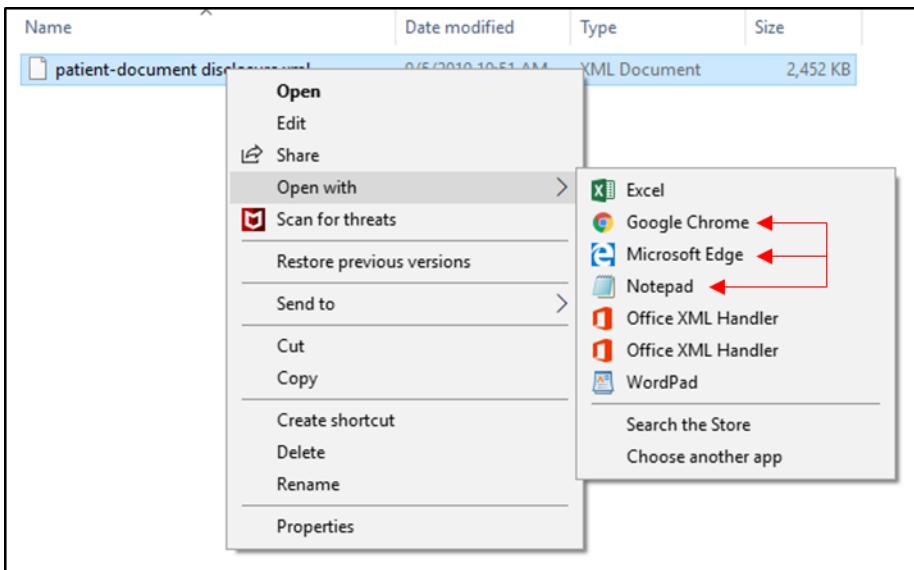
Step	Action
5.	<p>If using Google Chrome as the browser, the user must open the saved file using Google Chrome or another XML viewer application (e.g. MS Edge or Notepad).</p> <p>Note: If the user is using IE as the browser when downloading the XML, this step is not necessary as IE is used as the default browser for the XML viewer. For more information, refer to Section 5: Troubleshooting.</p> 

Table 7: Generate C62 and SES

Step	Action
1.	<p>Under the Generate Documents Tab, select either C62 or Encounter Summary as the Document Type and click Generate.</p> <p>Note: If generating a C62, use the Google Chrome web browser for best result. Contents of the C62 text note are base64 encoded, requiring the browser to translate the data link URL, which IE is not doing for the C62.</p>  <p>The screenshot shows the 'Patient Detail' page with various tabs at the top: Consent Status, Comments, Generate Documents, Recent Activity, Accounting of Disclosures, and Facilities. Below these tabs, there is a note about selecting documents opening a new window. Under 'Document Type (Required)', a dropdown menu is set to 'C62'. At the bottom left, a blue 'GENERATE' button is highlighted with a red arrow pointing to it.</p>

Step	Action																														
2.	<p>If multiple documents are returned, select View Document to generate the appropriate document or Save XML to download and save the XML.</p> <p>Note: View Document will open the document in a new browser window and Save XML will prompt the user to save the file as an XML document.</p>  <p>The screenshot shows the 'Patient Detail' page with patient information and a list of documents. The 'View Document' and 'Save XML' links for each document entry are highlighted with red dashed boxes.</p> <table border="1"> <thead> <tr> <th>Time Created</th> <th>Description</th> <th>Author</th> <th>Facility Name</th> <th>View</th> <th>Download</th> </tr> </thead> <tbody> <tr> <td>20190320085500</td> <td>HISTORY & PHYSICAL (D) FEMALE (CDA)</td> <td>^VA</td> <td>DAYTSHR</td> <td>View Document</td> <td>Save XML</td> </tr> <tr> <td>20190320083300</td> <td>CARDIOLOGY CONSULT RESULT (CDA)</td> <td>^VA</td> <td>DAYTSHR</td> <td>View Document</td> <td>Save XML</td> </tr> <tr> <td>20190307131100</td> <td>PRP 2ND RULE VIOLATION (CDA)</td> <td>^VA</td> <td>DAYTSHR</td> <td>View Document</td> <td>Save XML</td> </tr> <tr> <td>20190327000000</td> <td>LR SURGICAL PATHOLOGY REPORT (CDA)</td> <td>^VA</td> <td>CHYSHR</td> <td>View Document</td> <td>Save XML</td> </tr> </tbody> </table>	Time Created	Description	Author	Facility Name	View	Download	20190320085500	HISTORY & PHYSICAL (D) FEMALE (CDA)	^VA	DAYTSHR	View Document	Save XML	20190320083300	CARDIOLOGY CONSULT RESULT (CDA)	^VA	DAYTSHR	View Document	Save XML	20190307131100	PRP 2ND RULE VIOLATION (CDA)	^VA	DAYTSHR	View Document	Save XML	20190327000000	LR SURGICAL PATHOLOGY REPORT (CDA)	^VA	CHYSHR	View Document	Save XML
Time Created	Description	Author	Facility Name	View	Download																										
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20190327000000	LR SURGICAL PATHOLOGY REPORT (CDA)	^VA	CHYSHR	View Document	Save XML																										
3.	<p>When downloading the XML, Save XML as a file.</p>  <p>The screenshot shows the 'Save As' dialog box. The 'File name:' field contains 'patient-document disclosure' and the 'Save as type:' field is set to 'XML Document (*.xml)'. The 'Save' and 'Cancel' buttons are visible at the bottom.</p>																														

Step	Action
4.	<p>If using Google Chrome as the browser, the user must open the saved file using Google Chrome or another XML viewer application (e.g. MS Edge or Notepad).</p> <p>Note: If the user is using IE as the browser when downloading the XML, this step is not necessary as IE is used as the default browser for the XML viewer. For more information, refer to Section 5: Troubleshooting.</p> 

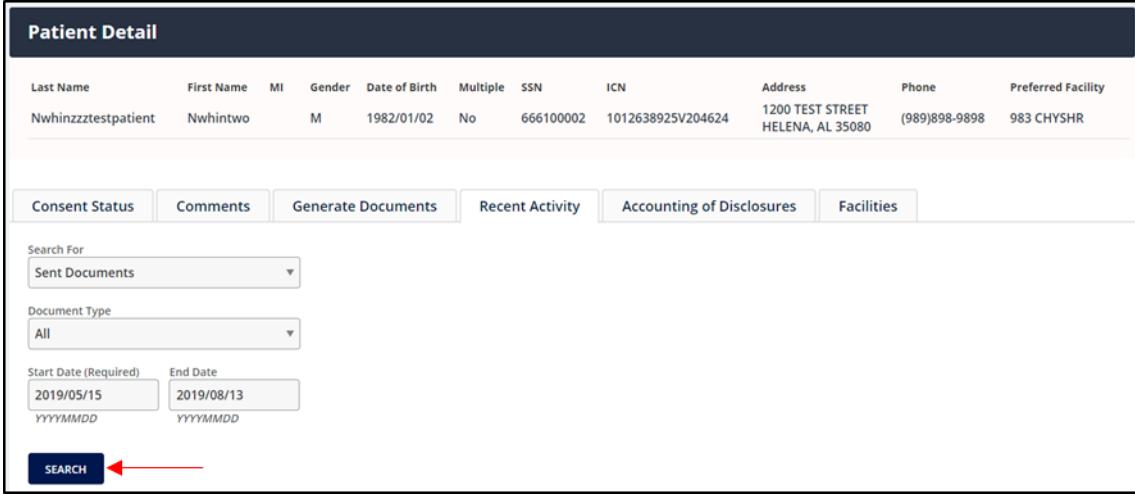
4.6. Recent Activity Tab

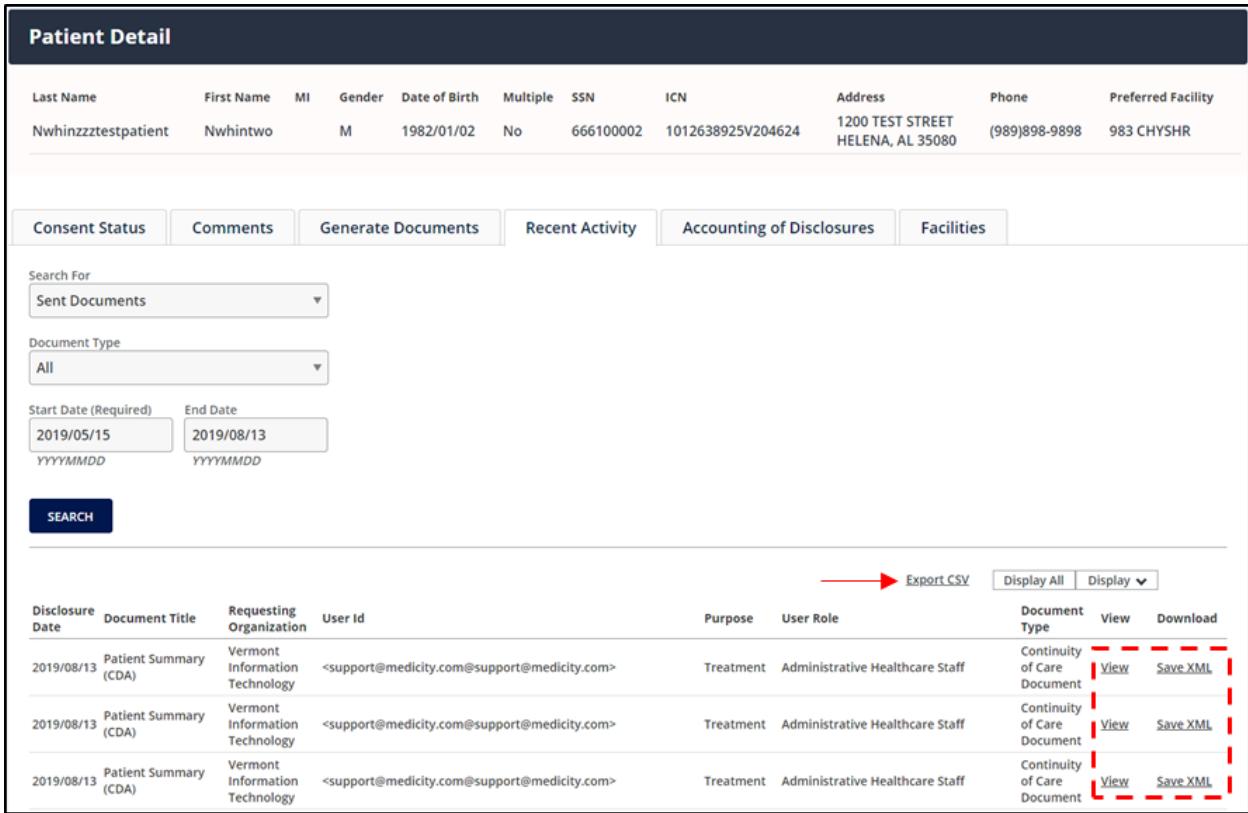
A VHIE user can select the Recent Activity tab in the Patient Detail page to generate a Patient-centric Sent Documents Report, which dates back 90-days.

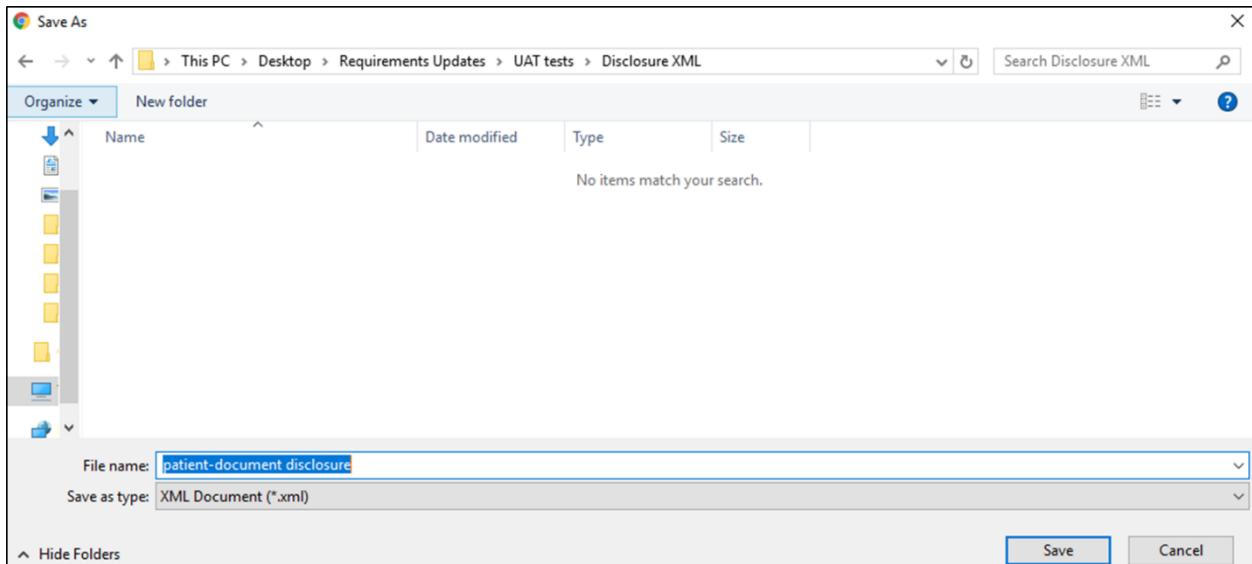
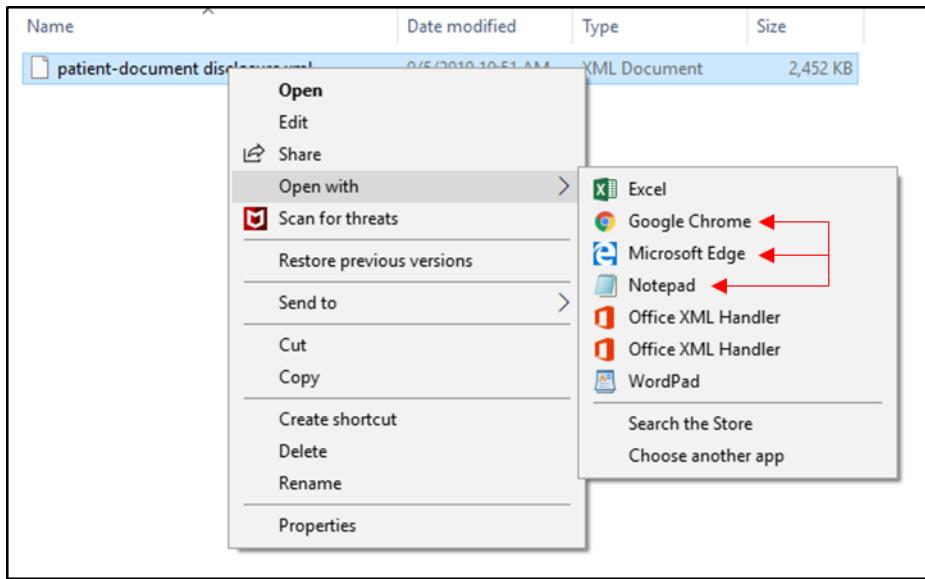
Prerequisite:

- 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 8: Generate Patient-centric Sent Documents

Step	Action
1.	<p>Under the Recent Activity Tab, complete the appropriate fields and click Search.</p>  <p>The screenshot shows a search interface titled "Patient Detail". At the top, there is a table with patient information: Last Name (Nwhinzztestpatient), First Name (Nwhintwo), MI (M), Gender (Male), Date of Birth (1982/01/02), Multiple (No), SSN (666100002), ICN (1012638925V204624), Address (1200 TEST STREET HELENA, AL 35080), Phone ((989)898-9898), and Preferred Facility (983 CHYSHR). Below this is a navigation bar with tabs: Consent Status, Comments, Generate Documents, Recent Activity, Accounting of Disclosures, and Facilities. Underneath the navigation bar are two dropdown menus: "Search For" (set to "Sent Documents") and "Document Type" (set to "All"). There are also two date input fields: "Start Date (Required)" (2019/05/15) and "End Date" (2019/08/13), both in YYYYMMDD format. At the bottom left is a blue "SEARCH" button, which has a red arrow pointing to it from the left side of the image.</p>

Step	Action																																			
<p>2. In the returned results, the user can 1) export the report to a .CSV file by clicking Export CSV, 2) view the disclosure by clicking View next to the disclosure, and 3) save the disclosure as an XML by clicking Save XML.</p> <p>Note:</p> <ul style="list-style-type: none"> 1. View link will open the document in a new browser window and Save XML will prompt the user to save the file as an XML document. 2. If exporting this report into a .CSV file, users must reformat all cells under the Disclosure Date column from the default format to a format that will display the Date and Time (e.g. 3/14/12 1:30 PM). For more information, refer to Section 5: Troubleshooting.  <p>The screenshot shows the 'Patient Detail' page. At the top, there is a table with patient information: Last Name (Nwhinzztestpatient), First Name (Nwhintwo), MI (M), Gender (M), Date of Birth (1982/01/02), Multiple (No), SSN (666100002), ICN (1012638925V204624), Address (1200 TEST STREET HELENA, AL 35080), Phone ((989)898-9898), and Preferred Facility (983 CHYSHR). Below this is a navigation bar with links: Consent Status, Comments, Generate Documents, Recent Activity, Accounting of Disclosures, and Facilities. Underneath are search fields for 'Search For' (Sent Documents) and 'Document Type' (All), along with date range inputs for 'Start Date (Required)' (2019/05/15) and 'End Date' (2019/08/13). A 'SEARCH' button is present. To the right of the search area are 'Export CSV', 'Display All', and 'Display' dropdown menus. The main content area displays a table of disclosure results:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Disclosure Date</th> <th style="width: 20%;">Document Title</th> <th style="width: 20%;">Requesting Organization</th> <th style="width: 20%;">User Id</th> <th style="width: 10%;">Purpose</th> <th style="width: 10%;">User Role</th> <th style="width: 10%;">Document Type</th> <th style="width: 10%;">View</th> <th style="width: 10%;">Download</th> </tr> </thead> <tbody> <tr> <td>2019/08/13</td> <td>Patient Summary (CDA)</td> <td>Vermont Information Technology</td> <td><support@medicity.com></td> <td>Treatment</td> <td>Administrative Healthcare Staff</td> <td>Continuity of Care Document</td> <td>View</td> <td>Save XML</td> </tr> <tr> <td>2019/08/13</td> <td>Patient Summary (CDA)</td> <td>Vermont Information Technology</td> <td><support@medicity.com></td> <td>Treatment</td> <td>Administrative Healthcare Staff</td> <td>Continuity of Care Document</td> <td>View</td> <td>Save XML</td> </tr> <tr> <td>2019/08/13</td> <td>Patient Summary (CDA)</td> <td>Vermont Information Technology</td> <td><support@medicity.com></td> <td>Treatment</td> <td>Administrative Healthcare Staff</td> <td>Continuity of Care Document</td> <td>View</td> <td>Save XML</td> </tr> </tbody> </table>	Disclosure Date	Document Title	Requesting Organization	User Id	Purpose	User Role	Document Type	View	Download	2019/08/13	Patient Summary (CDA)	Vermont Information Technology	<support@medicity.com>	Treatment	Administrative Healthcare Staff	Continuity of Care Document	View	Save XML	2019/08/13	Patient Summary (CDA)	Vermont Information Technology	<support@medicity.com>	Treatment	Administrative Healthcare Staff	Continuity of Care Document	View	Save XML	2019/08/13	Patient Summary (CDA)	Vermont Information Technology	<support@medicity.com>	Treatment	Administrative Healthcare Staff	Continuity of Care Document	View	Save XML
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Step	Action
3.	<p>When downloading the XML, Save XML as a file.</p> 
4.	<p>If using Google Chrome as the browser, the user must open the saved file using Google Chrome or another XML viewer application (e.g. MS Edge or Notepad).</p> <p>Note: If the user is using IE as the browser when downloading the XML, this step is not necessary as IE is used as the default browser for the XML viewer. For more information, refer to Section 5: Troubleshooting.</p> 

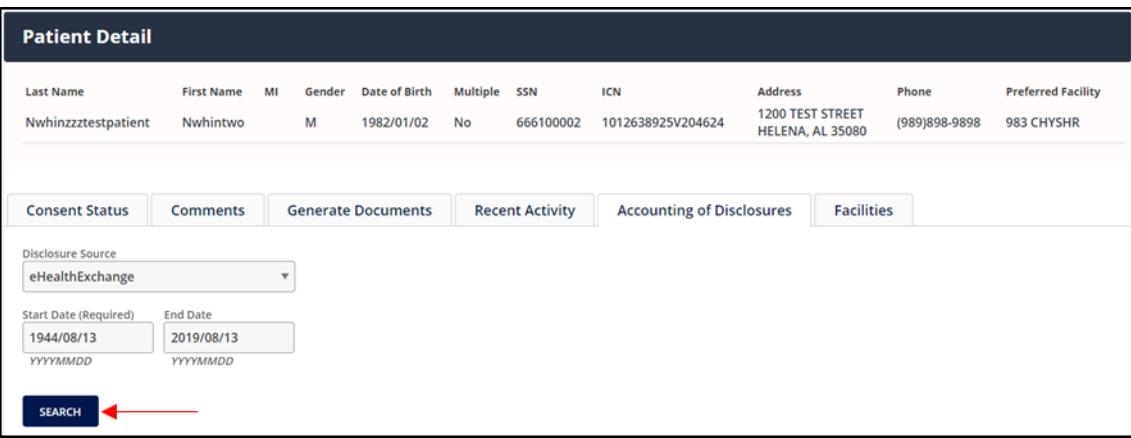
4.7. Accounting of Disclosures Tab

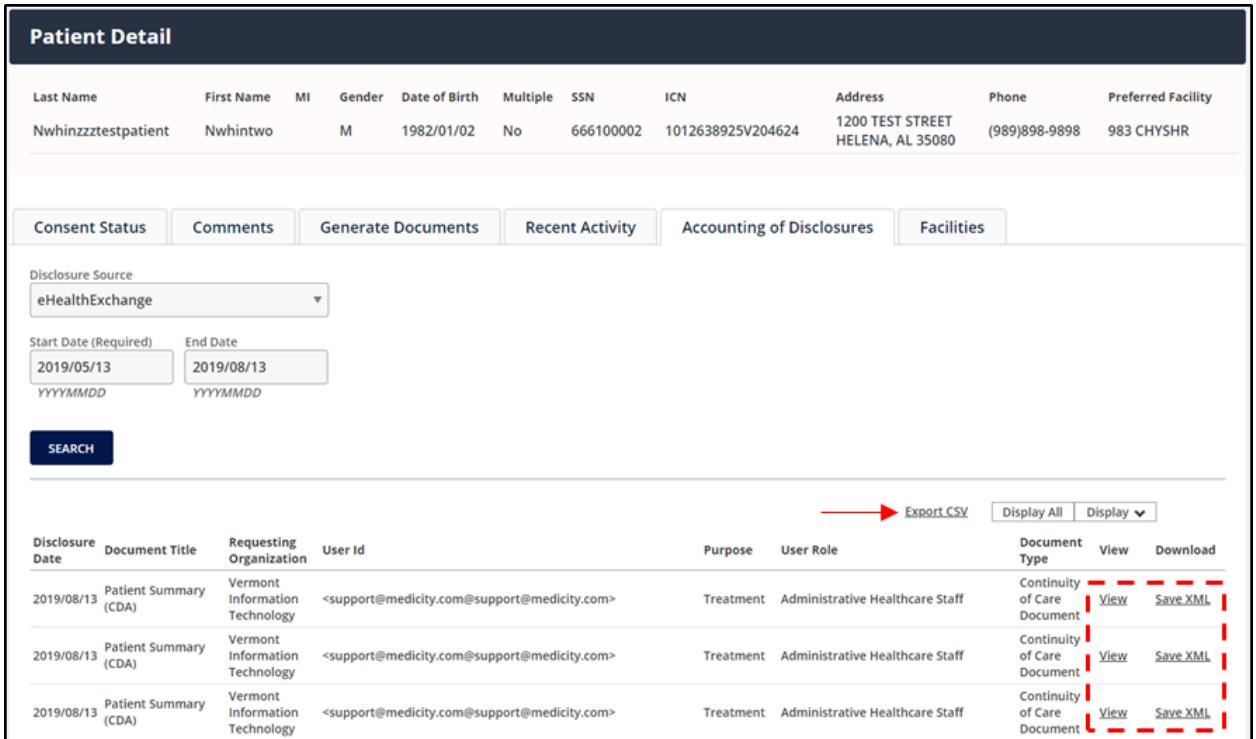
A VHIE user can select the Accounting of Disclosures Tab in the Patient Detail page to generate a Patient-centric Accounting of Disclosures Report, which dates back 75-years.

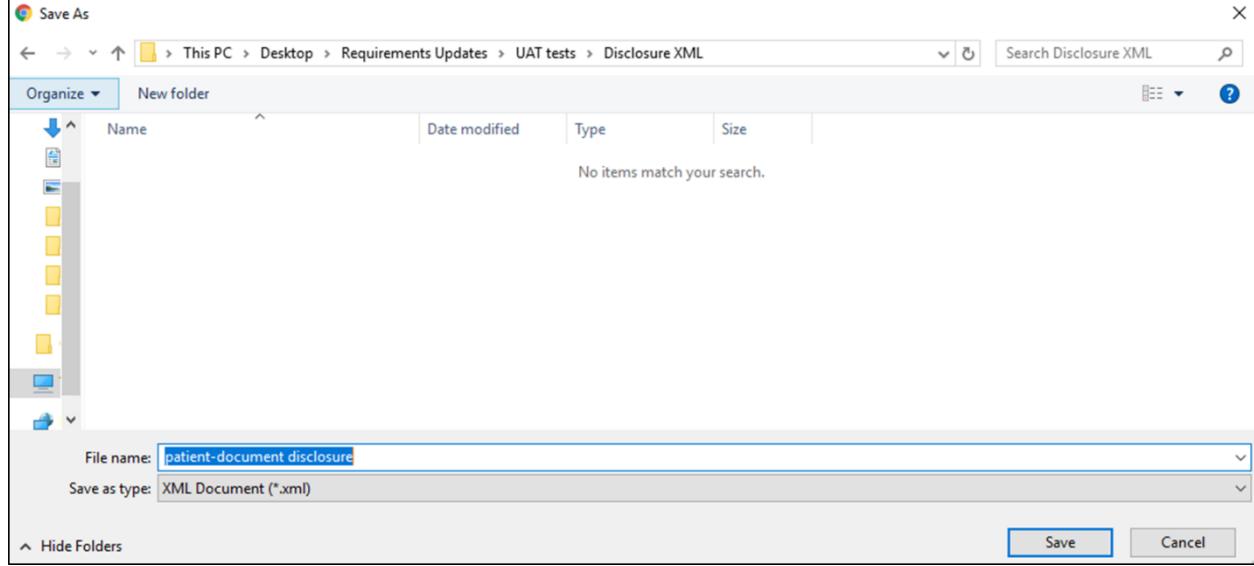
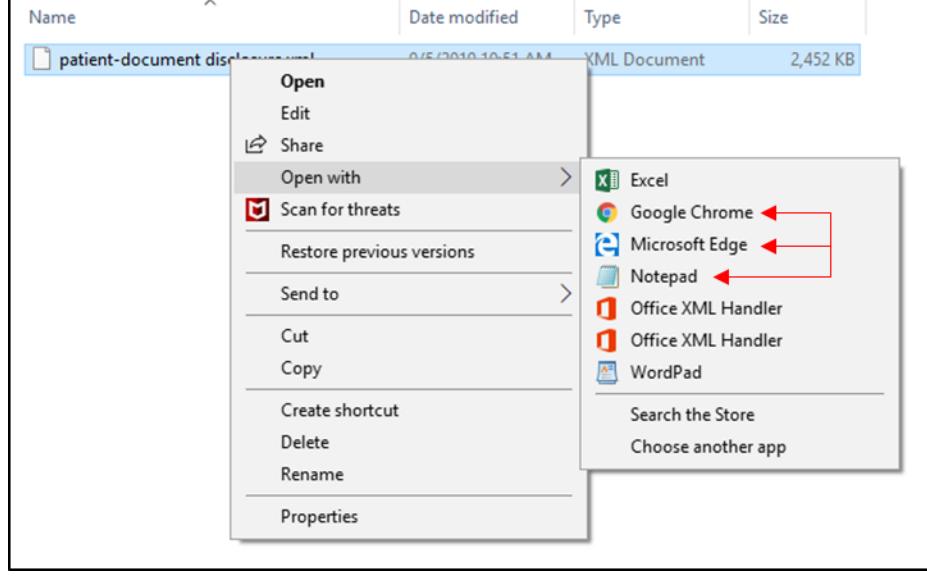
Prerequisite:

- 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 9: Generate Patient-centric Accounting of Disclosures

Step	Action
1.	<p>Under the Accounting of Disclosures Tab, complete the appropriate fields and click Search.</p>  <p>The screenshot shows the 'Patient Detail' section of the VHIE interface. It displays basic demographic information: Last Name (Nwhinzztestpatient), First Name (Nwhintwo), MI (M), Gender (Male), Date of Birth (1982/01/02), Multiple (No), SSN (666100002), ICN (1012638925V204624), Address (1200 TEST STREET HELENA, AL 35080), Phone ((989)898-9898), and Preferred Facility (983 CHYSHR). Below this, there are tabs for Consent Status, Comments, Generate Documents, Recent Activity, Accounting of Disclosures (which is currently selected), and Facilities. A 'Disclosure Source' dropdown is set to 'eHealthExchange'. Under 'Search Parameters', 'Start Date (Required)' is set to 1944/08/13 and 'End Date' is set to 2019/08/13. A red arrow points to the 'SEARCH' button at the bottom left of the search panel.</p>

Step	Action																																				
2.	<p>In the returned results, the user can 1) export the report to a .CSV file by clicking Export CSV, 2) view the disclosure by clicking View next to the disclosure, and 3) save the disclosure as an XML by clicking Save XML.</p> <p>Note:</p> <ol style="list-style-type: none"> 1. View link will open the document in a new browser window and Save XML will prompt the user to save the file as an XML document. 2. If exporting this report into a .CSV file, users must reformat all cells under the Disclosure Date column from the default format to a format that will display the Date and Time (e.g. 3/14/12 1:30 PM). For more information, refer to Section 5: Troubleshooting.  <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; padding: 5px;">Disclosure Date</th> <th style="text-align: left; padding: 5px;">Document Title</th> <th style="text-align: left; padding: 5px;">Requesting Organization</th> <th style="text-align: left; padding: 5px;">User Id</th> <th style="text-align: left; padding: 5px;">Purpose</th> <th style="text-align: left; padding: 5px;">User Role</th> <th style="text-align: left; padding: 5px;">Document Type</th> <th style="text-align: left; padding: 5px;">View</th> <th style="text-align: left; padding: 5px;">Download</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">2019/08/13</td> <td style="padding: 5px;">Patient Summary (CDA)</td> <td style="padding: 5px;">Vermont Information Technology</td> <td style="padding: 5px;"><support@medicity.com></td> <td style="padding: 5px;">Treatment</td> <td style="padding: 5px;">Administrative Healthcare Staff</td> <td style="padding: 5px;">Continuity of Care Document</td> <td style="padding: 5px;">View</td> <td style="padding: 5px;">Save XML</td> </tr> <tr> <td style="padding: 5px;">2019/08/13</td> <td style="padding: 5px;">Patient Summary (CDA)</td> <td style="padding: 5px;">Vermont Information Technology</td> <td style="padding: 5px;"><support@medicity.com></td> <td style="padding: 5px;">Treatment</td> <td style="padding: 5px;">Administrative Healthcare Staff</td> <td style="padding: 5px;">Continuity of Care Document</td> <td style="padding: 5px;">View</td> <td style="padding: 5px;">Save XML</td> </tr> <tr> <td style="padding: 5px;">2019/08/13</td> <td style="padding: 5px;">Patient Summary (CDA)</td> <td style="padding: 5px;">Vermont Information Technology</td> <td style="padding: 5px;"><support@medicity.com></td> <td style="padding: 5px;">Treatment</td> <td style="padding: 5px;">Administrative Healthcare Staff</td> <td style="padding: 5px;">Continuity of Care Document</td> <td style="padding: 5px;">View</td> <td style="padding: 5px;">Save XML</td> </tr> </tbody> </table>	Disclosure Date	Document Title	Requesting Organization	User Id	Purpose	User Role	Document Type	View	Download	2019/08/13	Patient Summary (CDA)	Vermont Information Technology	<support@medicity.com>	Treatment	Administrative Healthcare Staff	Continuity of Care Document	View	Save XML	2019/08/13	Patient Summary (CDA)	Vermont Information Technology	<support@medicity.com>	Treatment	Administrative Healthcare Staff	Continuity of Care Document	View	Save XML	2019/08/13	Patient Summary (CDA)	Vermont Information Technology	<support@medicity.com>	Treatment	Administrative Healthcare Staff	Continuity of Care Document	View	Save XML
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Step	Action
3.	<p>When using Google Chrome as the browser to download the XML, Save XML as a file.</p> 
4.	<p>If using Google Chrome as the browser, the user must open the saved file using Google Chrome or another XML viewer application (e.g. MS Edge or Notepad).</p> <p>Note: If the user is using IE as the browser when downloading the XML, this step is not necessary as IE is used as the default browser for the XML viewer. For more information, refer to Section 5: Troubleshooting.</p> 

4.8. Facilities Tab

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

Note: The Patient's VA Treatment Facilities information under the Facilities Tab is read-only.

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 4: View Patient's Treatment Facilities

The screenshot shows the VHIE Portal interface. At the top, there is a navigation bar with the VA logo, 'VHIE PORTAL', 'Patient Search', 'Reports', 'Admin', 'Welcome, vacoly', and 'Sign Out'. Below the navigation bar, the main content area is titled 'Patient Detail'. It displays a table with patient information: Last Name (Nwhinzzztestpatient), First Name (Nwhintwo), MI (M), Gender (M), Date of Birth (1982/01/02), Multiple (No), SSN (666100002), ICN (1012638925V204624), Address (1200 TEST STREET HELENA, AL 35080), Phone ((989)898-9898), and Preferred Facility (983 CHYSHR). Below this table is a horizontal menu bar with links: 'Consent Status', 'Comments', 'Generate Documents', 'Recent Activity', 'Accounting of Disclosures', and 'Facilities'. To the right of this menu is a dropdown button labeled 'Display All' and 'Display ▾'. The 'Facilities' section contains two rows of facility data. The first row is for VISION 1 - VA New England Healthcare System, with Facility VISN Number 983, Facility Station Number CHYSHR, Facility Name 538 - CHILLICOTHE OH VAMC, 517 - BECKLEY VAMC, and Facility Children VAMC Names 992 - CHYSQAS. The second row is for VISION 2 - VA Healthcare Network Upstate New York, with Facility VISN Number 984, Facility Station Number DAYTSHR, Facility Name 610 - NORTHERN INDIANA HEALTH CARE SYSTEM - MARION DIVISION, 565 - FAYETTEVILLE NC VAMC, and Facility Children VAMC Names 402 - MAINE VA HCS.

4.9. Search Menu – Return to Patient Search

From within the VHIE Portal, a VHIE user can select the “Patient Search” option at the top of the webpage 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 5: Return to Patient Search

The screenshot shows the VHIE Portal interface. At the top, there is a navigation bar with the VA logo, 'VHIE PORTAL', 'Patient Search' (which is highlighted with a red dashed box), 'Reports', 'Admin', 'Welcome, vacoly!', and 'Sign Out'. Below the navigation bar is a dark header bar labeled 'Patient Detail'. Underneath this, there is a table showing patient information:

Last Name	First Name	MI	Gender	Date of Birth	Multiple	SSN	ICN	Address	Phone	Preferred Facility
Nwhinzztestpatient	Nwhintwo	M		1982/01/02	No	666100002	1012638925V204624	1200 TEST STREET HELENA, AL 35080	(989)898-9898	983 CHYSHR

Below the table are several buttons: 'Consent Status', 'Comments', 'Generate Documents', 'Recent Activity', 'Accounting of Disclosures', and 'Facilities'. To the right of these buttons are two small buttons: 'Display All' and 'Display ▾'. At the bottom of the page, there is a table showing facility information:

Facility VISN Number	Facility Station Number	Facility Name	Facility Children VAMC Names
VISN 1 - VA New England Healthcare System	983	CHYSHR	538 - CHILLICOTHE OH VAMC 517 - BECKLEY VAMC 992 - CHYSQAS
VISN 2 - VA Healthcare Network Upstate New York	984	DAYTSHR	610 - NORTHERN INDIANA HEALTH CARE SYSTEM - MARION DIVISION 565 - FAYETTEVILLE NC VAMC 402 - MAINE VA HCS

4.10. Reports - Dashboard Widgets

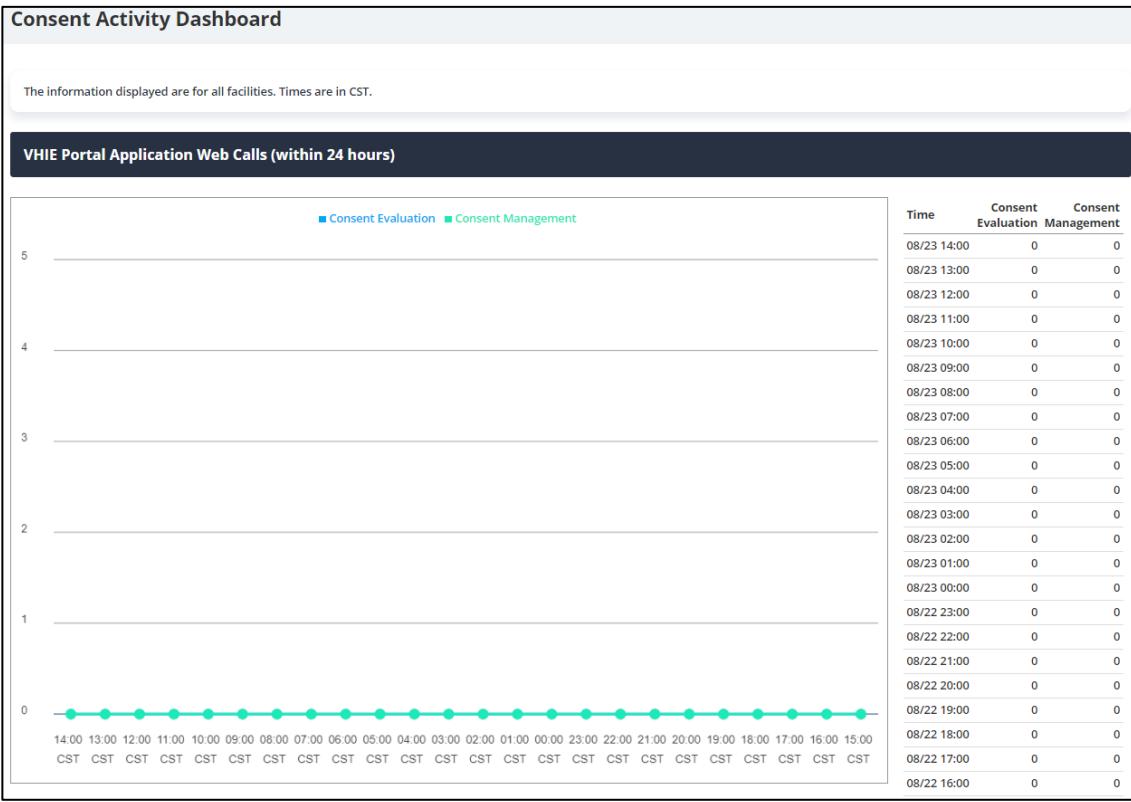
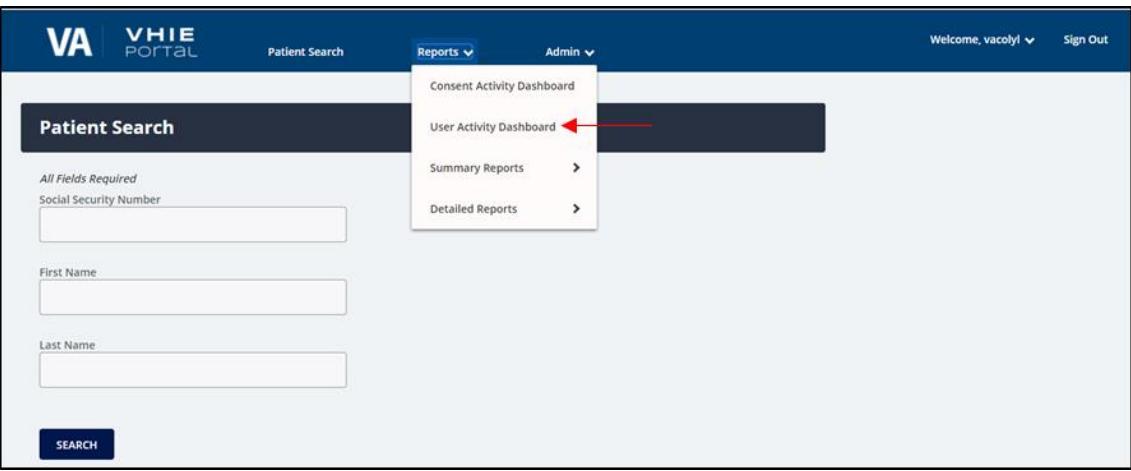
From within the VHIE Portal, a VHIE user can click the “Reports” option at the top of the webpage to select and generate either the Consent Activity or User Activity Dashboard. The Consent Activity Dashboard displays the number of web calls made to the VHIE Portal within the past 24-hours. The User Activity Dashboard shows the number of user logins to the VHIE Portal within the past 24-hours.

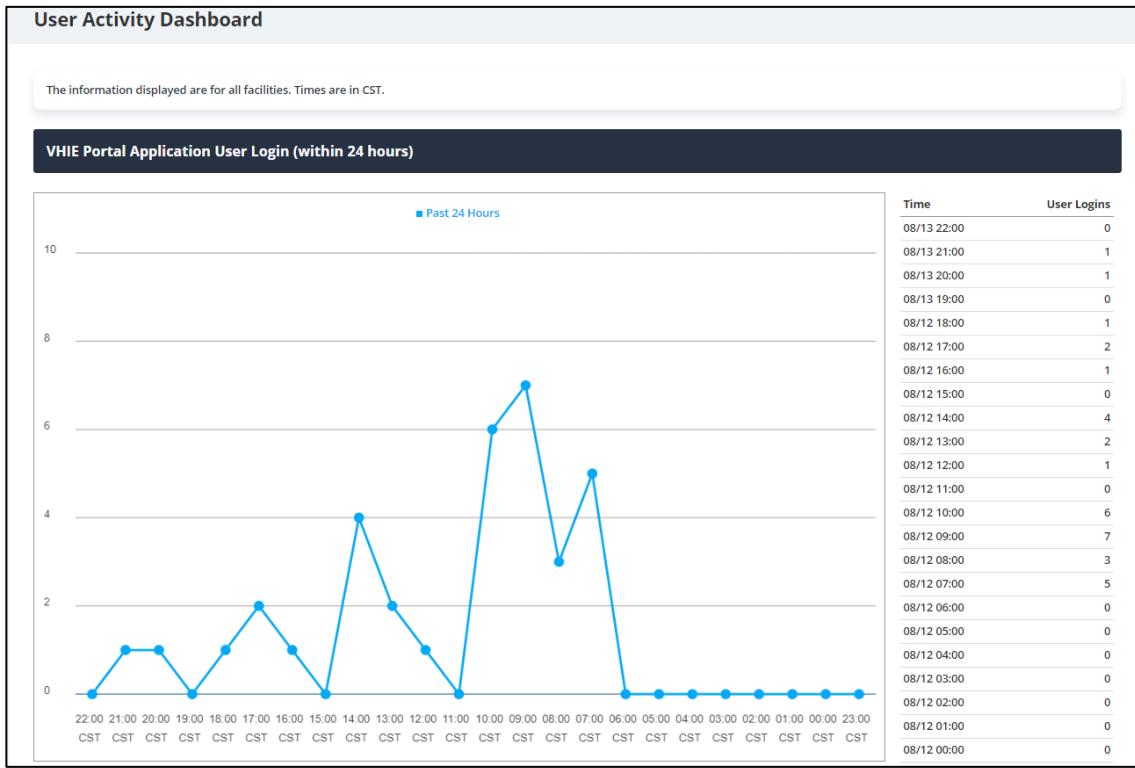
Prerequisite:

- The user has logged in via SSOi or another VA-approved method for authentication.
- The user has been assigned the appropriate roles to generate VHIE reports.

Table 10: Reports - Dashboard Widgets

Step	Action
1.	To generate the Consent Activity Dashboard, under Reports Menu, select Consent Activity Dashboard.

Step	Action																																																																								
2.	<p>If there have been web calls made to the VHIE Portal application for consent activities within the past 24-hours, the information will display in the generated graph.</p>  <p>The information displayed are for all facilities. Times are in CST.</p> <p>VHIE Portal Application Web Calls (within 24 hours)</p> <p>Legend: Consent Evaluation (blue), Consent Management (green)</p> <table border="1"> <thead> <tr> <th>Time</th> <th>Consent Evaluation</th> <th>Consent Management</th> </tr> </thead> <tbody> <tr><td>08/23 14:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 13:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 12:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 11:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 10:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 09:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 08:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 07:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 06:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 05:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 04:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 03:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 02:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 01:00</td><td>0</td><td>0</td></tr> <tr><td>08/23 00:00</td><td>0</td><td>0</td></tr> <tr><td>08/22 23:00</td><td>0</td><td>0</td></tr> <tr><td>08/22 22:00</td><td>0</td><td>0</td></tr> <tr><td>08/22 21:00</td><td>0</td><td>0</td></tr> <tr><td>08/22 20:00</td><td>0</td><td>0</td></tr> <tr><td>08/22 19:00</td><td>0</td><td>0</td></tr> <tr><td>08/22 18:00</td><td>0</td><td>0</td></tr> <tr><td>08/22 17:00</td><td>0</td><td>0</td></tr> <tr><td>08/22 16:00</td><td>0</td><td>0</td></tr> </tbody> </table>	Time	Consent Evaluation	Consent Management	08/23 14:00	0	0	08/23 13:00	0	0	08/23 12:00	0	0	08/23 11:00	0	0	08/23 10:00	0	0	08/23 09:00	0	0	08/23 08:00	0	0	08/23 07:00	0	0	08/23 06:00	0	0	08/23 05:00	0	0	08/23 04:00	0	0	08/23 03:00	0	0	08/23 02:00	0	0	08/23 01:00	0	0	08/23 00:00	0	0	08/22 23:00	0	0	08/22 22:00	0	0	08/22 21:00	0	0	08/22 20:00	0	0	08/22 19:00	0	0	08/22 18:00	0	0	08/22 17:00	0	0	08/22 16:00	0	0
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3.	<p>To generate the User Activity Dashboard, under Reports Menu, select User Activity Dashboard.</p> 																																																																								

Step	Action																																																
4.	<p>If any user accounts were logged into the VHIE Portal application within the past 24-hours, the information will display in the generated graph.</p>  <p>The User Activity Dashboard displays the number of user logins per hour over the past 24 hours. The graph shows a peak around 10:00 CST on August 13th, with approximately 6 logins. The table provides a detailed breakdown of each login event.</p> <table border="1" data-bbox="1220 530 1437 1108"> <thead> <tr> <th>Time</th> <th>User Logins</th> </tr> </thead> <tbody> <tr><td>08/13 22:00</td><td>0</td></tr> <tr><td>08/13 21:00</td><td>1</td></tr> <tr><td>08/13 20:00</td><td>1</td></tr> <tr><td>08/13 19:00</td><td>0</td></tr> <tr><td>08/13 18:00</td><td>1</td></tr> <tr><td>08/12 17:00</td><td>2</td></tr> <tr><td>08/12 16:00</td><td>1</td></tr> <tr><td>08/12 15:00</td><td>0</td></tr> <tr><td>08/12 14:00</td><td>4</td></tr> <tr><td>08/12 13:00</td><td>2</td></tr> <tr><td>08/12 12:00</td><td>1</td></tr> <tr><td>08/12 11:00</td><td>0</td></tr> <tr><td>08/12 10:00</td><td>6</td></tr> <tr><td>08/12 09:00</td><td>7</td></tr> <tr><td>08/12 08:00</td><td>3</td></tr> <tr><td>08/12 07:00</td><td>5</td></tr> <tr><td>08/12 06:00</td><td>0</td></tr> <tr><td>08/12 05:00</td><td>0</td></tr> <tr><td>08/12 04:00</td><td>0</td></tr> <tr><td>08/12 03:00</td><td>0</td></tr> <tr><td>08/12 02:00</td><td>0</td></tr> <tr><td>08/12 01:00</td><td>0</td></tr> <tr><td>08/12 00:00</td><td>0</td></tr> </tbody> </table>	Time	User Logins	08/13 22:00	0	08/13 21:00	1	08/13 20:00	1	08/13 19:00	0	08/13 18:00	1	08/12 17:00	2	08/12 16:00	1	08/12 15:00	0	08/12 14:00	4	08/12 13:00	2	08/12 12:00	1	08/12 11:00	0	08/12 10:00	6	08/12 09:00	7	08/12 08:00	3	08/12 07:00	5	08/12 06:00	0	08/12 05:00	0	08/12 04:00	0	08/12 03:00	0	08/12 02:00	0	08/12 01:00	0	08/12 00:00	0
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4.11. Reports – Detailed HIE and Consent Reports

From within the VHIE Portal, a VHIE user can click the “Reports” option at the top of the webpage to select and generate the Detailed HIE and Consent Reports. The Detailed HIE and Consent Reports includes the following:

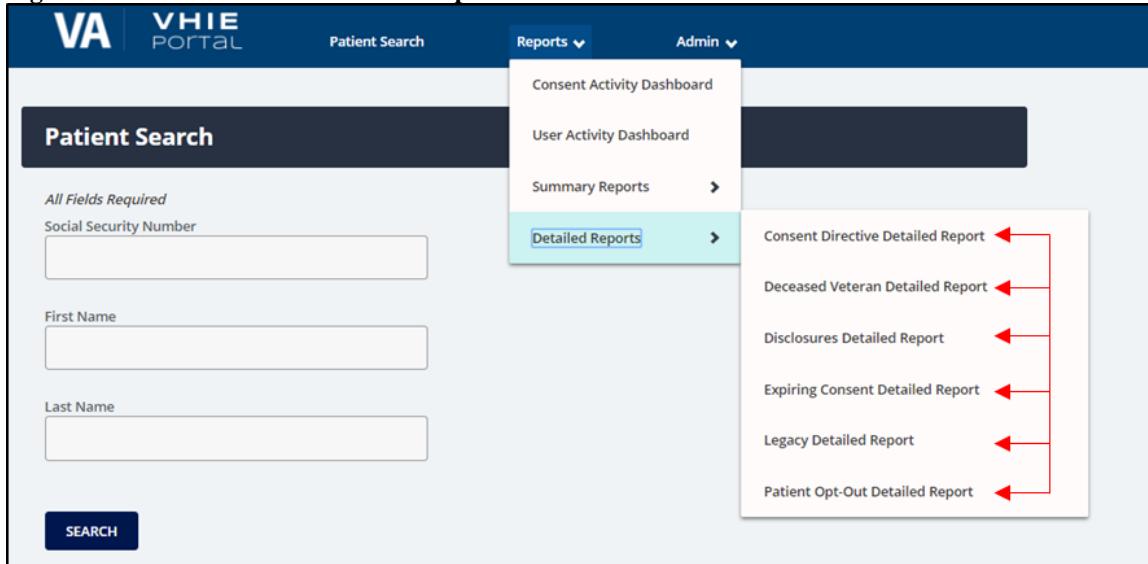
- Consent Directive Detailed Report
- Deceased Veteran Detailed Report
- Disclosures Detailed Report
- Expiring Consent Detailed Report
- Legacy Detailed Report
- Patient Opt-Out Detailed Report

Prerequisite:

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

- The user has been assigned the appropriate roles to generate VHIE reports.

Figure 6: Detailed HIE and Consent Report Menu



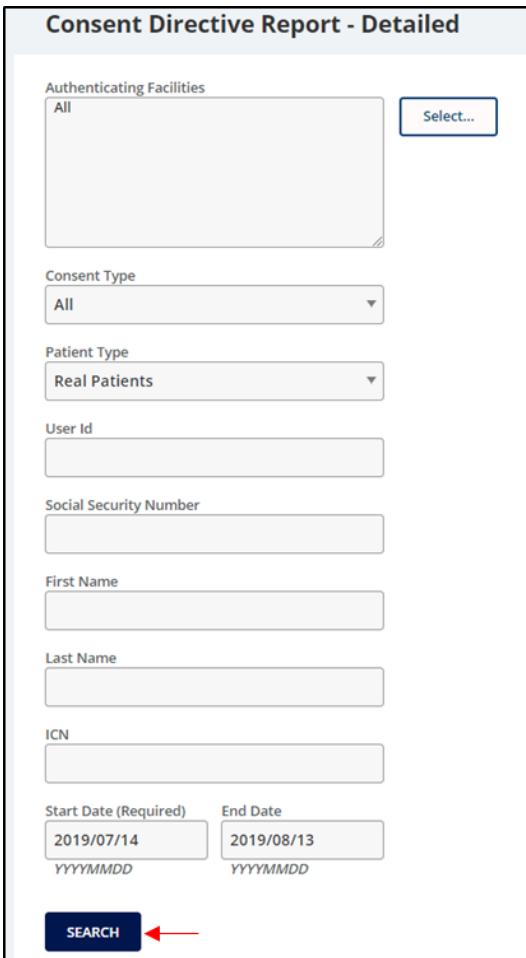
4.11.1. Consent Directive Detailed Report

The Consent Directive Detailed Report provides a detailed listing of specified "participate in sharing" and "opt-out of sharing" activities for one or more patients for a selected range of dates at selected VA Authenticating facilities.

Table 11: Consent Directive Detailed Report

Step	Action
1.	Select Consent Directive Detailed Report.

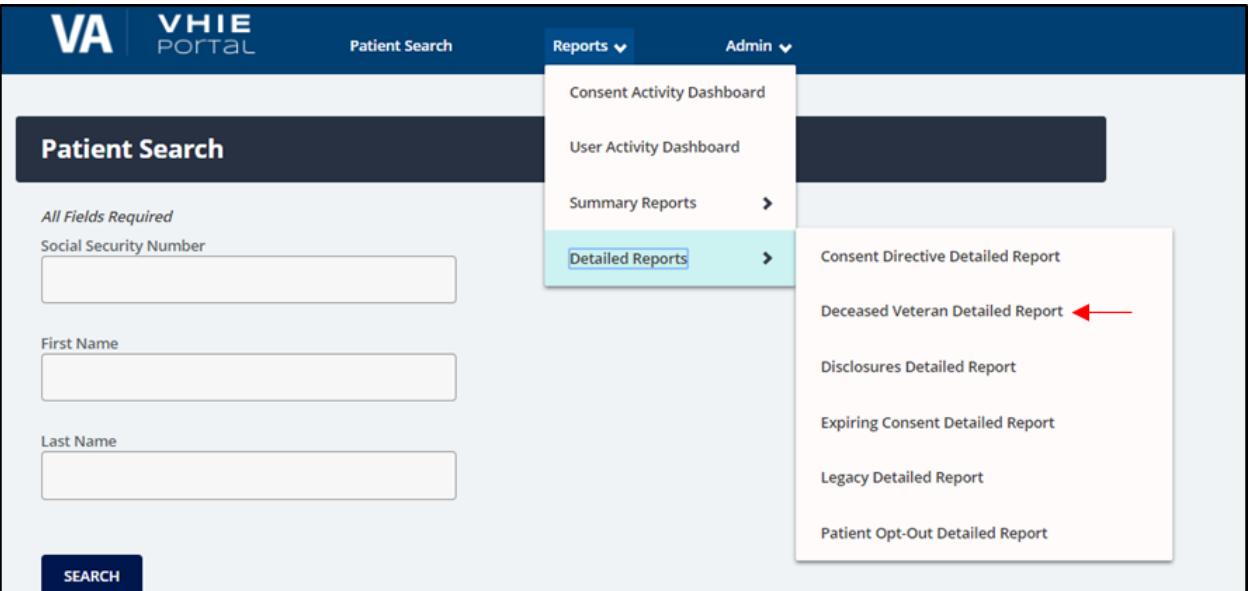
This screenshot is identical to Figure 6, showing the VHIE PORTAL interface with the Detailed Reports menu expanded. The 'Consent Directive Detailed Report' option is highlighted with a red arrow pointing to it.

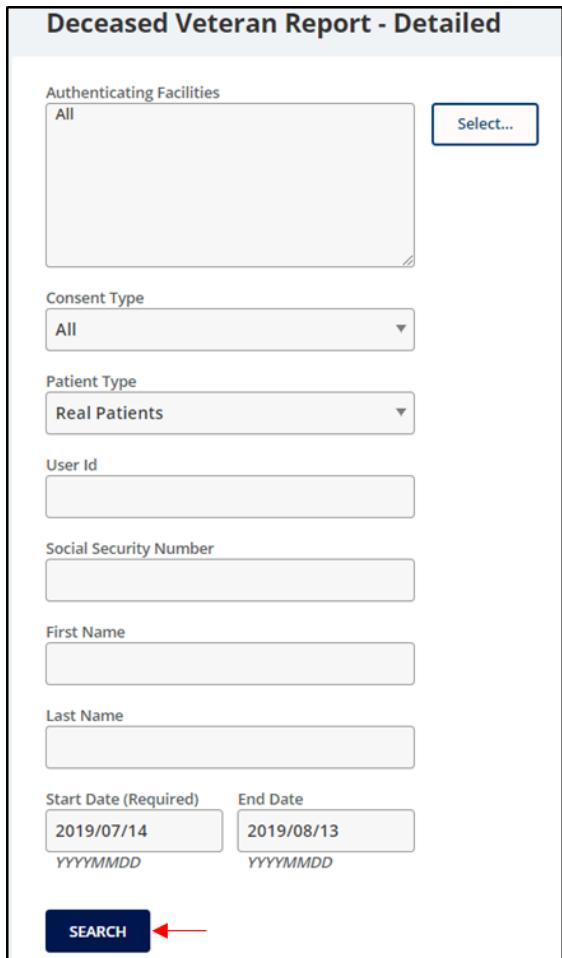
Step	Action																																																																																																																					
2.	<p>Complete the appropriate search criteria, then click Search.</p> 																																																																																																																					
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VA Mid-Atlantic Health Care Network</td> <td style="padding: 2px;"></td> </tr> <tr> <td style="padding: 2px;">154578722</td> <td style="padding: 2px;">1012647053V192196</td> <td style="padding: 2px;">RODDICK</td> <td style="padding: 2px;">MARK</td> <td style="padding: 2px;">2019/07/30 11:43:03 CST</td> <td style="padding: 2px;">2019/07/30</td> <td style="padding: 2px;">TREATMENT</td> <td style="padding: 2px;">eHealth Exchange Re-participate</td> <td style="padding: 2px;">Entered in Error</td> <td style="padding: 2px;">VHAISHSoatE</td> <td style="padding: 2px;">ALEDA E. LUTZ VA MEDICAL CENTER</td> <td style="padding: 2px;">VISN 10 - VA Healthcare System of Ohio</td> <td style="padding: 2px;"></td> </tr> </tbody> </table>	SSN	ICN	Last Name	First Name	Time of Event	Signature Date	Purpose of Use	Consent Type	Reason	User Id	Authorizing Facility	VISN	View	796017172	1012592963V937803	WHEELER	LEONARD	2019/08/12 10:19:00 CST	2019/08/12	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	Unknown			796022234	1012592954V501502	ROSS	GLORIA	2019/08/12 10:18:57 CST	2019/08/12	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	Unknown			796079018	1012658430V604777	WATSON	RUSSELL	2019/08/12 10:13:19 CST	2017/04/10	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	Unknown			796066619	1012592962V751978	WILSON	LEONA	2019/08/12 10:12:37 CST	2019/08/12	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	Unknown			796056674	1012592966V272192	SCOTT	DIANNE	2019/08/12 10:12:22 CST	2019/08/12	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	Unknown			796060339	1012592959V436136	WOOD	JAMIE	2019/08/12 10:10:52 CST	2019/08/12	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	Unknown			111109999	1011230922V699704	NHINPATIENT	JOSEPH	2019/08/12 10:10:07 CST	2016/10/18	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	ASHEVILLE VAMC	VISN 6 - VA Mid-Atlantic Health Care Network		154578722	1012647053V192196	RODDICK	MARK	2019/07/30 11:43:03 CST	2019/07/30	TREATMENT	eHealth Exchange Re-participate	Entered in Error	VHAISHSoatE	ALEDA E. 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4.11.2. Deceased Veteran Detailed Report

The Deceased Veteran Detailed Report provides information for records of deceased patients.

Table 12: Deceased Veteran Detailed Report

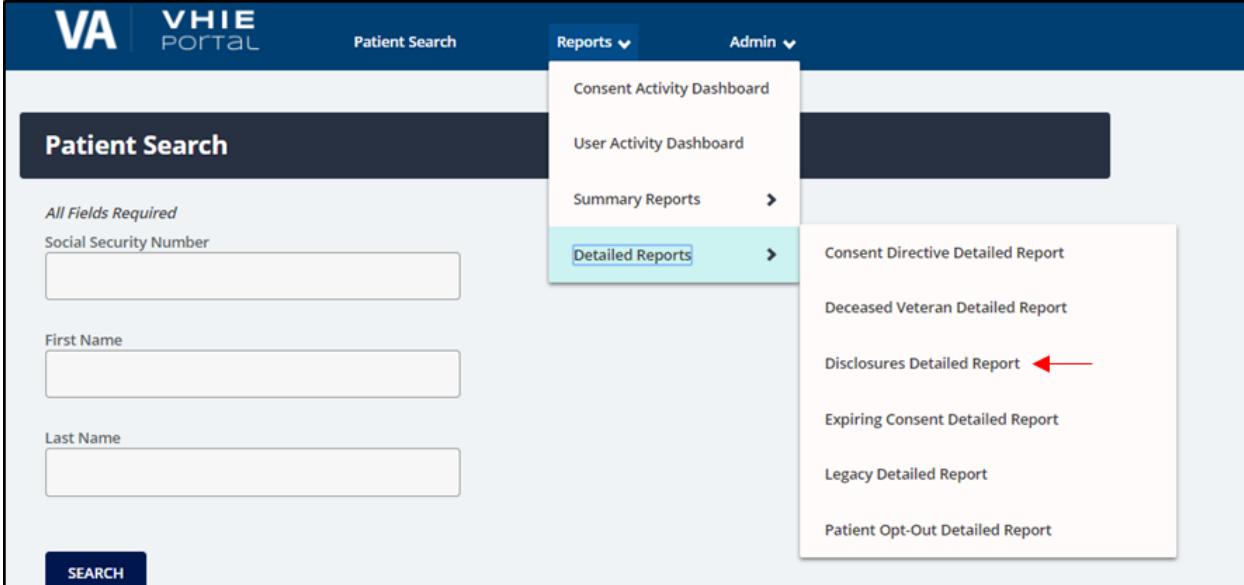
Step	Action
1.	<p>Select Deceased Veteran Detailed Report.</p>  <p>The screenshot shows the VHIE Portal interface. At the top, there's a navigation bar with the VA logo, 'VHIE PORTAL', 'Patient Search', 'Reports', and 'Admin'. A dropdown menu for 'Reports' is open, showing options like 'Consent Activity Dashboard', 'User Activity Dashboard', 'Summary Reports', and 'Detailed Reports'. 'Detailed Reports' is highlighted with a teal background. A red arrow points from the text 'Deceased Veteran Detailed Report' to the corresponding link in the dropdown menu. Below the dropdown, there's a 'Patient Search' form with fields for Social Security Number, First Name, and Last Name, and a 'SEARCH' button.</p>

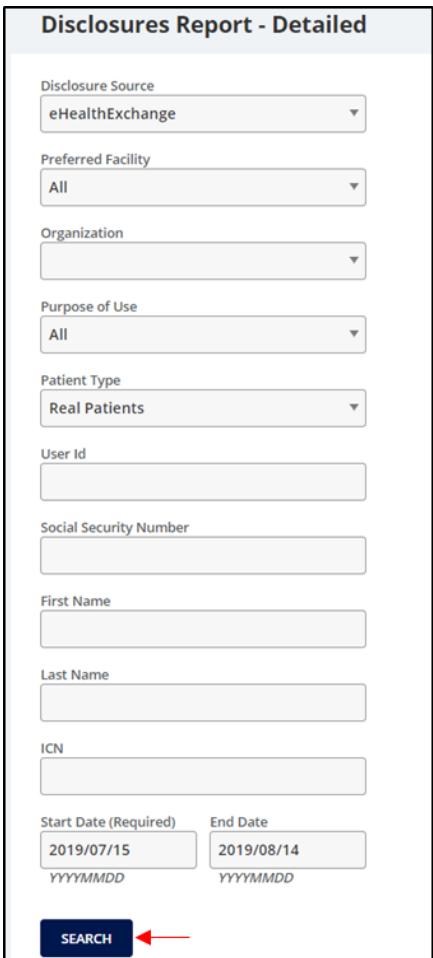
Step	Action																																							
2.	<p>Complete the appropriate search criteria, then click Search.</p> 																																							
3.	<p>In the returned results, the user can export the report to a .CSV file by clicking Export CSV.</p>  <table border="1" data-bbox="316 1339 1573 1552"> <thead> <tr> <th>SSN</th><th>Last Name</th><th>First Name</th><th>Time of Event</th><th>Signature Date</th><th>Purpose of Use</th><th>Consent Type</th><th>Reason</th><th>User Id</th><th>Authorizing Facility</th><th>Facility Id</th><th>VISN</th><th>View</th></tr> </thead> <tbody> <tr> <td>796079018</td><td>WATSON</td><td>RUSSELL</td><td>2019/08/12 10:13:19 CST</td><td>2017/04/10</td><td>TREATMENT</td><td>eHealth Exchange Opt-out</td><td>Opt-out</td><td>DataMigration</td><td>Unknown</td><td>Unknown</td><td></td><td></td></tr> <tr> <td>111109999</td><td>NHINPATIENT</td><td>JOSEPH</td><td>2019/08/12 10:10:07 CST</td><td>2016/10/18</td><td>TREATMENT</td><td>eHealth Exchange Opt-out</td><td>Opt-out</td><td>DataMigration</td><td>ASHEVILLE VAMC</td><td>637</td><td>VISN 6 - VA Mid-Atlantic Health Care Network</td><td></td></tr> </tbody> </table>	SSN	Last Name	First Name	Time of Event	Signature Date	Purpose of Use	Consent Type	Reason	User Id	Authorizing Facility	Facility Id	VISN	View	796079018	WATSON	RUSSELL	2019/08/12 10:13:19 CST	2017/04/10	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	Unknown	Unknown			111109999	NHINPATIENT	JOSEPH	2019/08/12 10:10:07 CST	2016/10/18	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	ASHEVILLE VAMC	637	VISN 6 - VA Mid-Atlantic Health Care Network	
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4.11.3. Disclosures Detailed Report

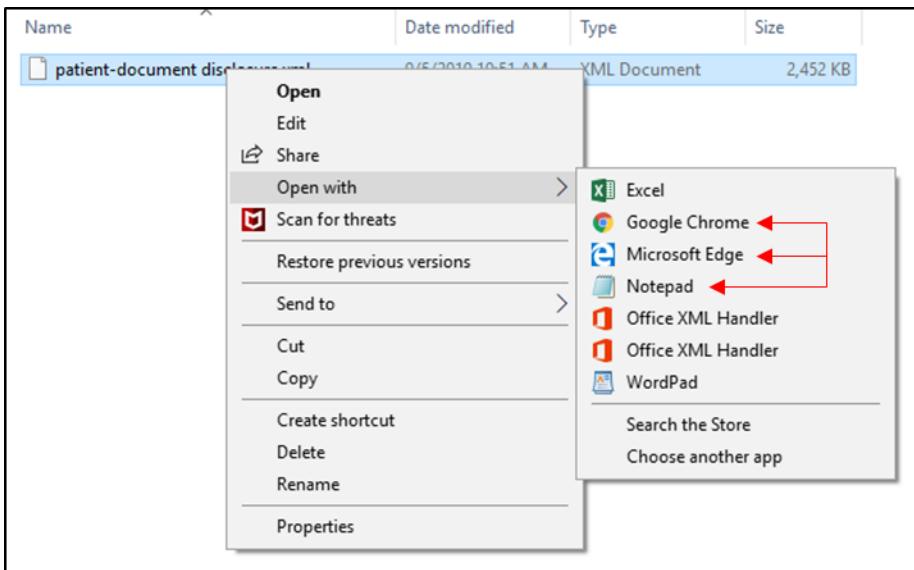
The Disclosures Detailed Report provides analytical Accounting of Disclosures information that may date back to a maximum of 75-years from date of last activity.

Table 13: Disclosures Detailed Report

Step	Action
1.	<p>Select Disclosures Detailed Report.</p>  <p>The screenshot shows the VHIE Portal interface. At the top, there's a navigation bar with the VA logo, 'VHIE PORTAL', 'Patient Search', 'Reports', and 'Admin'. A dropdown menu under 'Reports' is open, showing options like 'Consent Activity Dashboard', 'User Activity Dashboard', 'Summary Reports', and 'Detailed Reports'. 'Detailed Reports' is highlighted with a blue background. Below this, a 'Patient Search' form is visible with fields for 'Social Security Number', 'First Name', and 'Last Name', each with an input field and a placeholder 'All Fields Required'. A 'SEARCH' button is at the bottom of the form. To the right of the search form is a sidebar with links: 'Consent Directive Detailed Report', 'Deceased Veteran Detailed Report', 'Disclosures Detailed Report' (which has a red arrow pointing to it), 'Expiring Consent Detailed Report', 'Legacy Detailed Report', and 'Patient Opt-Out Detailed Report'.</p>

Step	Action
2.	<p>Complete the appropriate search criteria, then click Search.</p> 

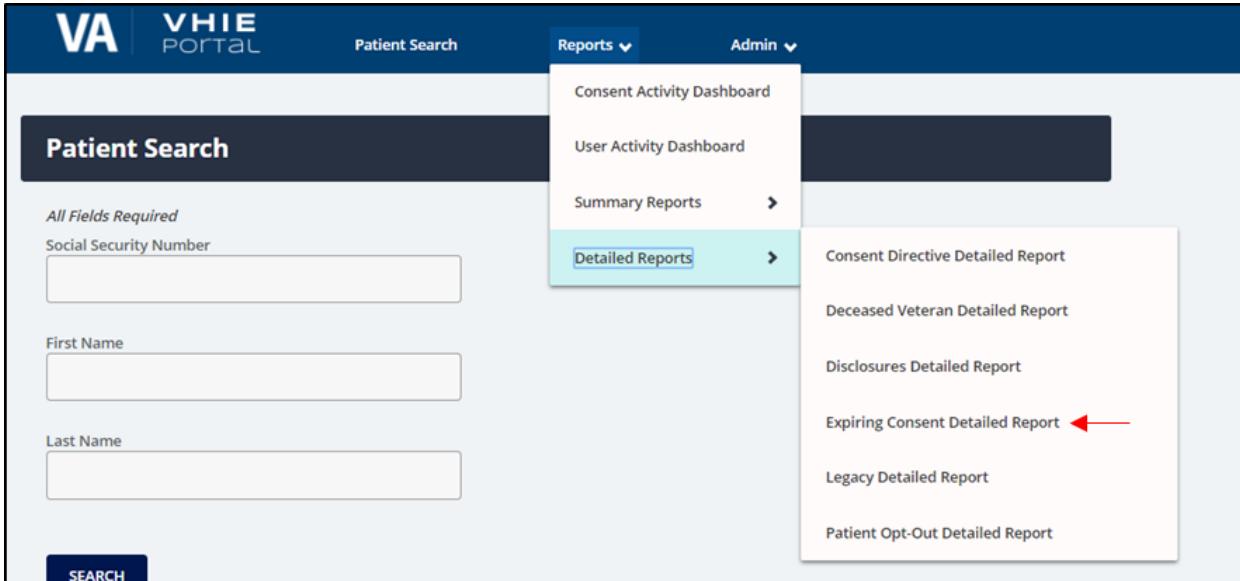
Step	Action																																																															
3.	<p>In the returned results for the Disclosures Detailed Report, the user can 1) export the report to a .CSV file by clicking Export CSV, 2) view the disclosure by clicking View next to the disclosure, and 3) save the disclosure as an XML by clicking Save XML.</p> <p>Note:</p> <ol style="list-style-type: none"> 1. View link will open the document in a new browser window and Save XML will prompt the user to save the file as an XML document. 2. If exporting this report into a .CSV file, users must reformat all cells under the Disclosure Date column from the default format to a format that will display the Date and Time (e.g. 3/14/12 1:30 PM). For more information, refer to Section 5: Troubleshooting. <table border="1"> <thead> <tr> <th>SSN</th><th>ICN</th><th>First Name</th><th>Last Name</th><th>Disclosure Date</th><th>Disclosure</th><th>Preferred Facility</th><th>eHealth Exchange Organization</th><th>User Id</th><th>User Role</th><th>Purpose</th><th>View</th><th>Download</th></tr> </thead> <tbody> <tr> <td>796079018</td><td>1012658430V604777</td><td>RUSSELL</td><td>WATSON</td><td>2019/08/13</td><td>Department of Veterans Affairs Health Summary</td><td>Unknown</td><td>Unknown</td><td>VHAISHSOATE</td><td>Public Health</td><td>TREATMENT</td><td>View</td><td>Save XML</td></tr> <tr> <td>796079018</td><td>1012658430V604777</td><td>RUSSELL</td><td>WATSON</td><td>2019/08/13</td><td>Department of Veterans Affairs Summarization of Episode Notes</td><td>Unknown</td><td>Unknown</td><td>VHAISHSOATE</td><td>Public Health</td><td>TREATMENT</td><td>View</td><td>Save XML</td></tr> <tr> <td>552153531</td><td></td><td></td><td></td><td>2019/08/07</td><td>EVENT (HISTORICAL) DAVTSR TEST LAB Encounter Summary (CDA)</td><td>Unknown</td><td>Georgia HIN</td><td><CN=gahintest.unifydm.com, OU=NHIN-Test, O=NHIN, C=US></td><td>%H5_Clinician;HSGroup_eHQ:TREATMENT Treatment</td><td>View</td><td>Save XML</td></tr> <tr> <td>7197251</td><td></td><td></td><td></td><td>2019/08/07</td><td>DISCHARGE SUMMARY (CDA)</td><td>Unknown</td><td>Georgia HIN</td><td><CN=gahintest.unifydm.com, OU=NHIN-Test, O=NHIN, C=US></td><td>%H5_Clinician;HSGroup_eHQ:TREATMENT Treatment</td><td>View</td><td>Save XML</td></tr> </tbody> </table>	SSN	ICN	First Name	Last Name	Disclosure Date	Disclosure	Preferred Facility	eHealth Exchange Organization	User Id	User Role	Purpose	View	Download	796079018	1012658430V604777	RUSSELL	WATSON	2019/08/13	Department of Veterans Affairs Health Summary	Unknown	Unknown	VHAISHSOATE	Public Health	TREATMENT	View	Save XML	796079018	1012658430V604777	RUSSELL	WATSON	2019/08/13	Department of Veterans Affairs Summarization of Episode Notes	Unknown	Unknown	VHAISHSOATE	Public Health	TREATMENT	View	Save XML	552153531				2019/08/07	EVENT (HISTORICAL) DAVTSR TEST LAB Encounter Summary (CDA)	Unknown	Georgia HIN	<CN=gahintest.unifydm.com, OU=NHIN-Test, O=NHIN, C=US>	%H5_Clinician;HSGroup_eHQ:TREATMENT Treatment	View	Save XML	7197251				2019/08/07	DISCHARGE SUMMARY (CDA)	Unknown	Georgia HIN	<CN=gahintest.unifydm.com, OU=NHIN-Test, O=NHIN, C=US>	%H5_Clinician;HSGroup_eHQ:TREATMENT Treatment	View	Save XML
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4.	When downloading the XML, Save XML as a file.																																																															

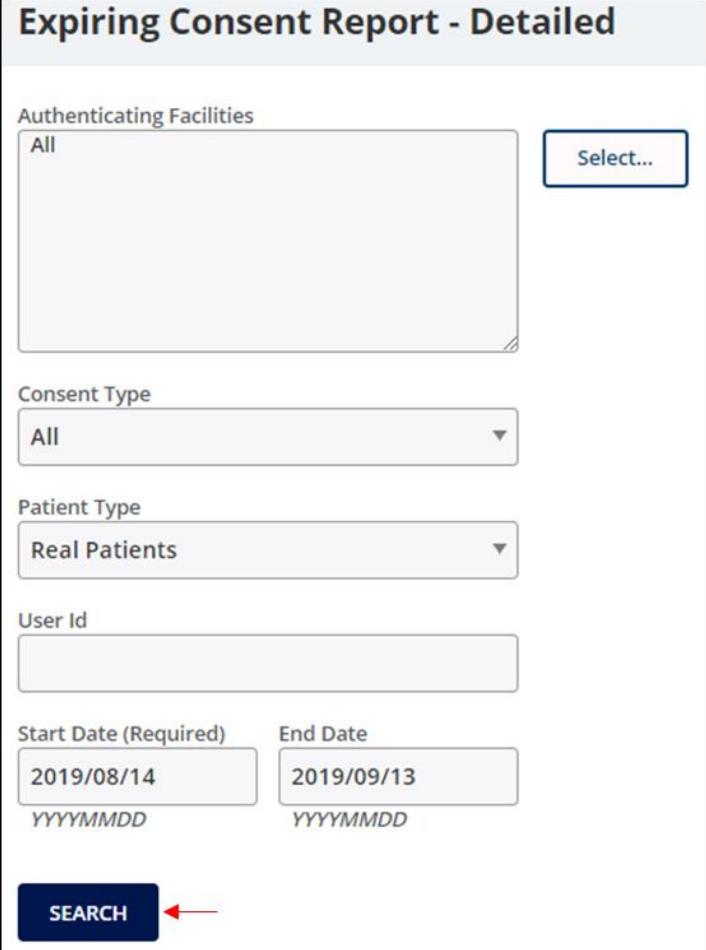
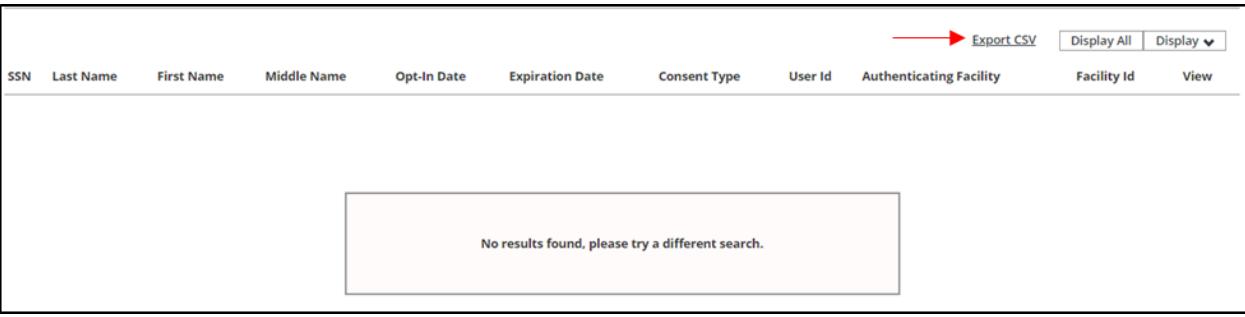
Step	Action
5.	<p>If using Google Chrome as the browser, the user must open the saved file using Google Chrome or another XML viewer application (e.g. MS Edge or Notepad).</p> <p>Note: If the user is using IE as the browser when downloading the XML, this step is not necessary as IE is used as the default browser for the XML viewer. For more information, refer to Section 5: Troubleshooting.</p> 

4.11.4. Expiring Consent Detailed Report

The Expiring Consent Detailed Report provides a detailed listing of active and upcoming expirations for SSA authorizations for Coverage.

Table 14: Expiring Consent Detailed Report

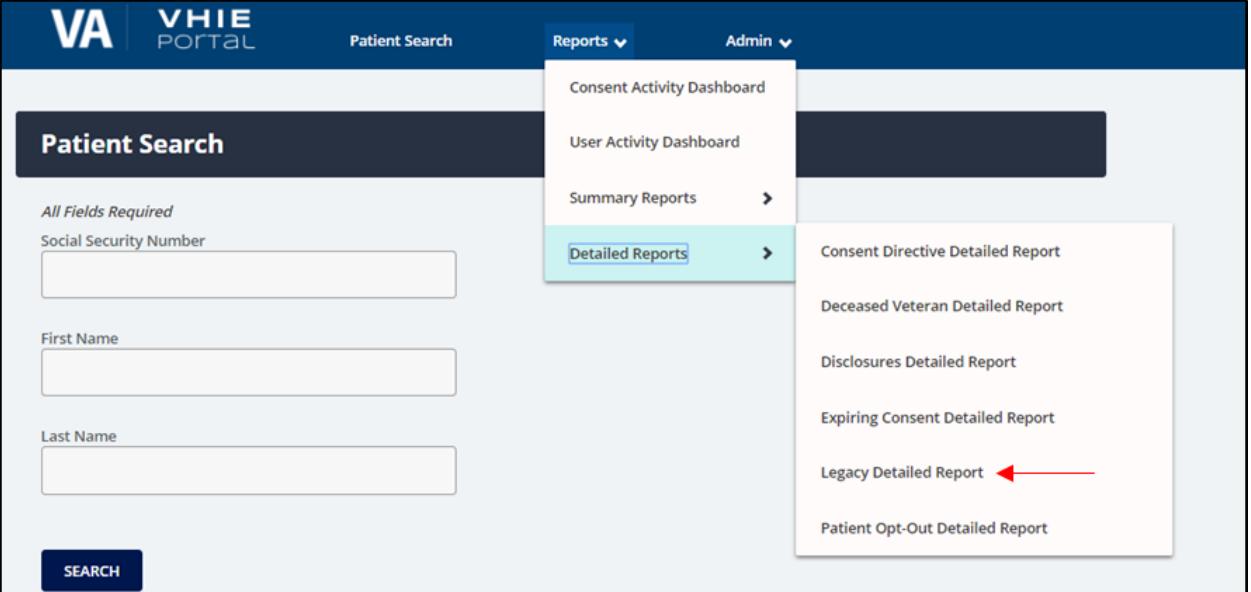
Step	Action
1.	Select Expiring Consent Detailed Report.  <p>Social Security Number <input type="text"/></p> <p>First Name <input type="text"/></p> <p>Last Name <input type="text"/></p> <p>SEARCH</p> <ul style="list-style-type: none">Consent Activity DashboardUser Activity DashboardSummary Reports >Detailed Reports > Expiring Consent Detailed Report ←Consent Directive Detailed ReportDeceased Veteran Detailed ReportDisclosures Detailed ReportLegacy Detailed ReportPatient Opt-Out Detailed Report

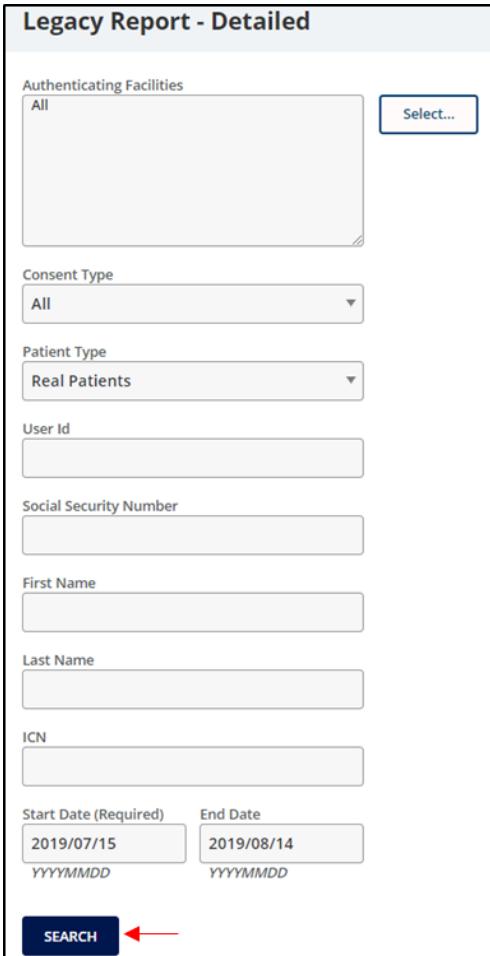
Step	Action
2.	<p>Complete the appropriate search criteria, then click Search.</p> <p>Note: For best result, select “All Patient” for the Patient Type field and set the End Date field to a year into the future (e.g. if current year is 2019, set the end date for 2020).</p> 
3.	<p>In the returned results, the user can export the report to a .CSV file by clicking Export CSV.</p> <p>Note: Expiring Consent Reports in SQA environment currently does not display SSA info until connection from VDIF to SSA is approved in SQA.</p> 

4.11.5. Legacy Detailed Report

The Legacy Detailed Report shows historical consent data of the Patient's Participation Preferences (legacy opt-in and opt-out consent policies), prior to the Mission Act.

Table 15: Legacy Detailed Report

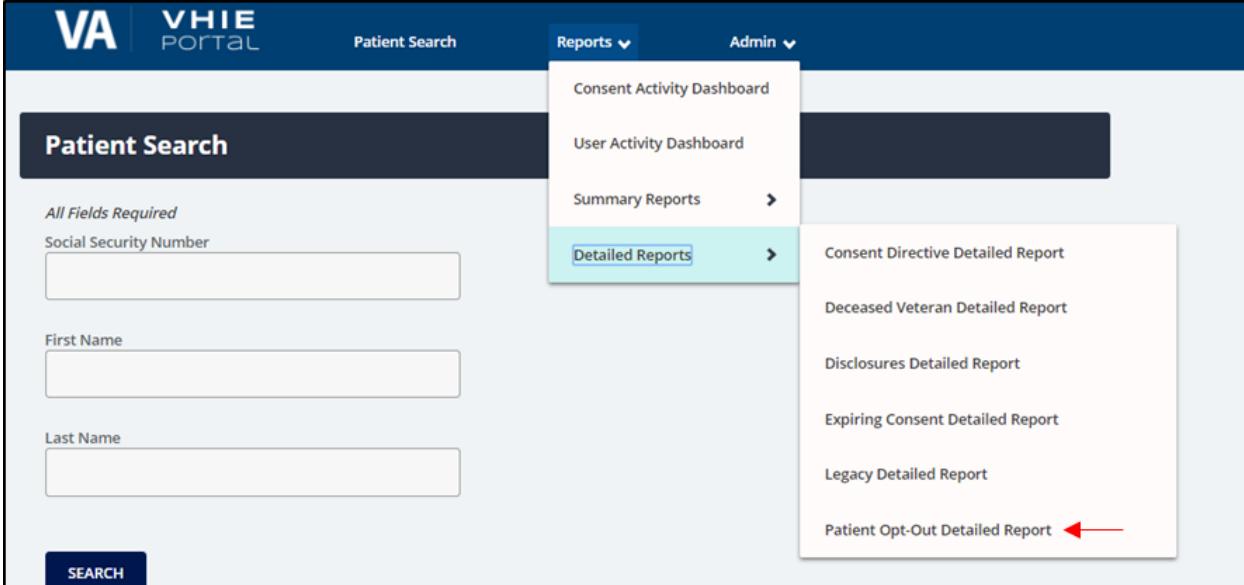
Step	Action
1.	Select Legacy Detailed Report.  <p>VA VHIE PORTAL</p> <p>Patient Search</p> <p>Reports ▾ Admin ▾</p> <p>Consent Activity Dashboard</p> <p>User Activity Dashboard</p> <p>Summary Reports ➤</p> <p>Detailed Reports ➤</p> <p>Consent Directive Detailed Report</p> <p>Deceased Veteran Detailed Report</p> <p>Disclosures Detailed Report</p> <p>Expiring Consent Detailed Report</p> <p>Legacy Detailed Report</p> <p>Patient Opt-Out Detailed Report</p> <p>Patient Search</p> <p>All Fields Required</p> <p>Social Security Number <input type="text"/></p> <p>First Name <input type="text"/></p> <p>Last Name <input type="text"/></p> <p>SEARCH</p>

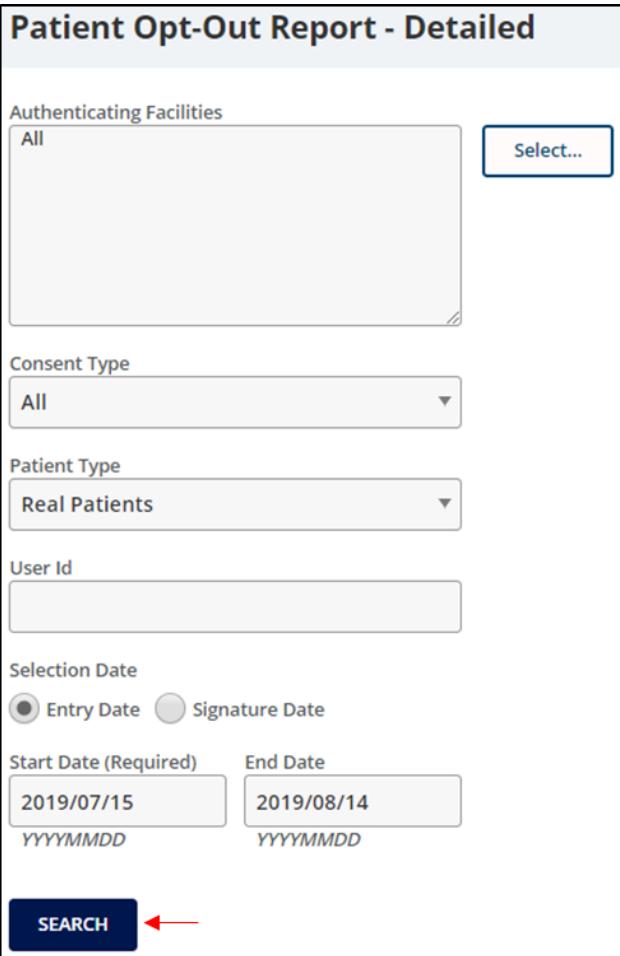
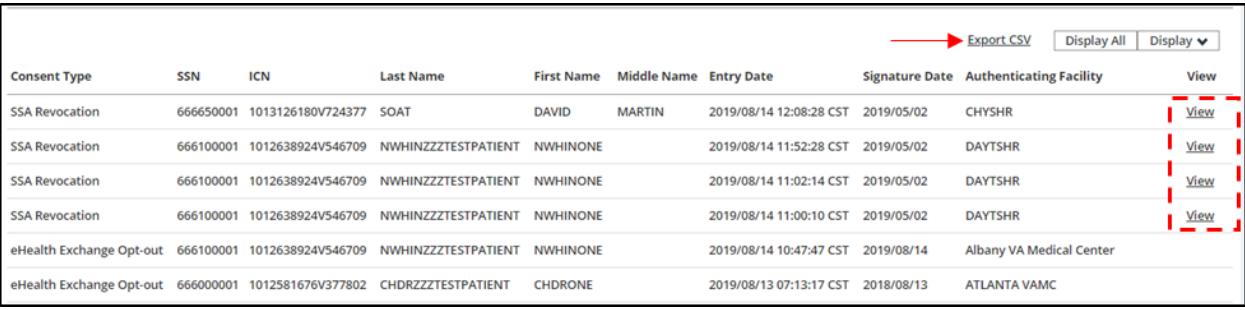
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2.	<p>Complete the appropriate search criteria, then click Search.</p> 																																																				
3.	<p>In the returned results, the user can export the report to a .CSV file by clicking Export CSV.</p>  <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; padding: 2px;">SSN</th> <th style="text-align: left; padding: 2px;">ICN</th> <th style="text-align: left; padding: 2px;">Last Name</th> <th style="text-align: left; padding: 2px;">First Name</th> <th style="text-align: left; padding: 2px;">Time of Event</th> <th style="text-align: left; padding: 2px;">Signature Date</th> <th style="text-align: left; padding: 2px;">Purpose of Use</th> <th style="text-align: left; padding: 2px;">Consent Type</th> <th style="text-align: left; padding: 2px;">Reason</th> <th style="text-align: left; padding: 2px;">User Id</th> <th style="text-align: left; padding: 2px;">Authenticating Facility</th> <th style="text-align: left; padding: 2px;">VISN</th> <th style="text-align: left; padding: 2px;">View</th> </tr> </thead> <tbody> <tr> <td style="padding: 2px;">666100005</td><td style="padding: 2px;">1012663918V362378</td><td style="padding: 2px;">NWHINZZZTESTPATIENT</td><td style="padding: 2px;">NWHINFIVE</td><td style="padding: 2px;">2019/07/26 07:00:30 CST</td><td style="padding: 2px;">2019/07/26</td><td style="padding: 2px;">TREATMENT</td><td style="padding: 2px;">Legacy eHealth Authorization</td><td style="padding: 2px;"></td><td style="padding: 2px;">vacosadup</td><td style="padding: 2px;">DAYTSHR</td><td style="padding: 2px;">VISN 2 - VA Healthcare Network Upstate New York</td><td style="padding: 2px;"></td></tr> <tr> <td style="padding: 2px;">666100005</td><td style="padding: 2px;">1012663918V362378</td><td style="padding: 2px;">NWHINZZZTESTPATIENT</td><td style="padding: 2px;">NWHINFIVE</td><td style="padding: 2px;">2019/07/26 06:49:31 CST</td><td style="padding: 2px;">2019/07/26</td><td style="padding: 2px;">TREATMENT</td><td style="padding: 2px;">Legacy eHealth Revocation</td><td style="padding: 2px;">Entered in Error</td><td style="padding: 2px;">vacosadup</td><td style="padding: 2px;">DAYTSHR</td><td style="padding: 2px;">VISN 2 - VA Healthcare Network Upstate New York</td><td style="padding: 2px;"></td></tr> <tr> <td style="padding: 2px;">666554401</td><td style="padding: 2px;">1012827750V749551</td><td style="padding: 2px;">RETENTIONONE</td><td style="padding: 2px;">TPZONE</td><td style="padding: 2px;">2019/07/16 19:00:00 CST</td><td style="padding: 2px;">2019/07/17</td><td style="padding: 2px;">TREATMENT</td><td style="padding: 2px;">Legacy eHealth Revocation</td><td style="padding: 2px;">Authorization Expired</td><td style="padding: 2px;">automatic service</td><td style="padding: 2px;">ASHEVILLE VAMC</td><td style="padding: 2px;">VISN 6 - VA Mid-Atlantic Health Care Network</td><td style="padding: 2px;"></td></tr> </tbody> </table>	SSN	ICN	Last Name	First Name	Time of Event	Signature Date	Purpose of Use	Consent Type	Reason	User Id	Authenticating Facility	VISN	View	666100005	1012663918V362378	NWHINZZZTESTPATIENT	NWHINFIVE	2019/07/26 07:00:30 CST	2019/07/26	TREATMENT	Legacy eHealth Authorization		vacosadup	DAYTSHR	VISN 2 - VA Healthcare Network Upstate New York		666100005	1012663918V362378	NWHINZZZTESTPATIENT	NWHINFIVE	2019/07/26 06:49:31 CST	2019/07/26	TREATMENT	Legacy eHealth Revocation	Entered in Error	vacosadup	DAYTSHR	VISN 2 - VA Healthcare Network Upstate New York		666554401	1012827750V749551	RETENTIONONE	TPZONE	2019/07/16 19:00:00 CST	2019/07/17	TREATMENT	Legacy eHealth Revocation	Authorization Expired	automatic service	ASHEVILLE VAMC	VISN 6 - VA Mid-Atlantic Health Care Network	
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666554401	1012827750V749551	RETENTIONONE	TPZONE	2019/07/16 19:00:00 CST	2019/07/17	TREATMENT	Legacy eHealth Revocation	Authorization Expired	automatic service	ASHEVILLE VAMC	VISN 6 - VA Mid-Atlantic Health Care Network																																										

4.11.6. Patient Opt-Out Detailed Report

The Patient Opt-Out Detailed Report provides a detailed listing of patients that are opt-out of sharing.

Table 16: Patient Opt-Out Detailed Report

Step	Action
1.	Select Patient Opt-Out Detailed Report. 

Step	Action																																																																						
2.	<p>Complete the appropriate search criteria, then click Search.</p> 																																																																						
3.	<p>In the returned results for the Patient Opt-Out Detailed Report, the user can 1) export the report to a .CSV file by clicking Export CSV, and 2) view the SSA PDF by clicking the View button next to the SSA consent.</p>  <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; padding: 2px;">Consent Type</th> <th style="text-align: left; padding: 2px;">SSN</th> <th style="text-align: left; padding: 2px;">ICN</th> <th style="text-align: left; padding: 2px;">Last Name</th> <th style="text-align: left; padding: 2px;">First Name</th> <th style="text-align: left; padding: 2px;">Middle Name</th> <th style="text-align: left; padding: 2px;">Entry Date</th> <th style="text-align: left; padding: 2px;">Signature Date</th> <th style="text-align: left; padding: 2px;">Authenticating Facility</th> <th style="text-align: left; padding: 2px;">View</th> </tr> </thead> <tbody> <tr> <td style="padding: 2px;">SSA Revocation</td><td style="padding: 2px;">666650001</td><td style="padding: 2px;">1013126180V724377</td><td style="padding: 2px;">SOAT</td><td style="padding: 2px;">DAVID</td><td style="padding: 2px;">MARTIN</td><td style="padding: 2px;">2019/08/14 12:08:28 CST</td><td style="padding: 2px;">2019/05/02</td><td style="padding: 2px;">CHYSHR</td><td style="padding: 2px;">View</td></tr> <tr> <td style="padding: 2px;">SSA Revocation</td><td style="padding: 2px;">666100001</td><td style="padding: 2px;">1012638924V546709</td><td style="padding: 2px;">NWHINZZZTESTPATIENT</td><td style="padding: 2px;">NWHINNONE</td><td style="padding: 2px;"></td><td style="padding: 2px;">2019/08/14 11:52:28 CST</td><td style="padding: 2px;">2019/05/02</td><td style="padding: 2px;">DAYTSHR</td><td style="padding: 2px;">View</td></tr> <tr> <td style="padding: 2px;">SSA Revocation</td><td style="padding: 2px;">666100001</td><td style="padding: 2px;">1012638924V546709</td><td style="padding: 2px;">NWHINZZZTESTPATIENT</td><td style="padding: 2px;">NWHINNONE</td><td style="padding: 2px;"></td><td style="padding: 2px;">2019/08/14 11:02:14 CST</td><td style="padding: 2px;">2019/05/02</td><td style="padding: 2px;">DAYTSHR</td><td style="padding: 2px;">View</td></tr> <tr> <td style="padding: 2px;">SSA Revocation</td><td style="padding: 2px;">666100001</td><td style="padding: 2px;">1012638924V546709</td><td style="padding: 2px;">NWHINZZZTESTPATIENT</td><td style="padding: 2px;">NWHINNONE</td><td style="padding: 2px;"></td><td style="padding: 2px;">2019/08/14 11:00:10 CST</td><td style="padding: 2px;">2019/05/02</td><td style="padding: 2px;">DAYTSHR</td><td style="padding: 2px;">View</td></tr> <tr> <td style="padding: 2px;">eHealth Exchange Opt-out</td><td style="padding: 2px;">666100001</td><td style="padding: 2px;">1012638924V546709</td><td style="padding: 2px;">NWHINZZZTESTPATIENT</td><td style="padding: 2px;">NWHINNONE</td><td style="padding: 2px;"></td><td style="padding: 2px;">2019/08/14 10:47:47 CST</td><td style="padding: 2px;">2019/08/14</td><td style="padding: 2px;">Albany VA Medical Center</td><td style="padding: 2px;"></td></tr> <tr> <td style="padding: 2px;">eHealth Exchange Opt-out</td><td style="padding: 2px;">666000001</td><td style="padding: 2px;">1012581676V377802</td><td style="padding: 2px;">CHDRZZZTESTPATIENT</td><td style="padding: 2px;">CHDRNONE</td><td style="padding: 2px;"></td><td style="padding: 2px;">2019/08/13 07:13:17 CST</td><td style="padding: 2px;">2018/08/13</td><td style="padding: 2px;">ATLANTA VAMC</td><td style="padding: 2px;"></td></tr> </tbody> </table>	Consent Type	SSN	ICN	Last Name	First Name	Middle Name	Entry Date	Signature Date	Authenticating Facility	View	SSA Revocation	666650001	1013126180V724377	SOAT	DAVID	MARTIN	2019/08/14 12:08:28 CST	2019/05/02	CHYSHR	View	SSA Revocation	666100001	1012638924V546709	NWHINZZZTESTPATIENT	NWHINNONE		2019/08/14 11:52:28 CST	2019/05/02	DAYTSHR	View	SSA Revocation	666100001	1012638924V546709	NWHINZZZTESTPATIENT	NWHINNONE		2019/08/14 11:02:14 CST	2019/05/02	DAYTSHR	View	SSA Revocation	666100001	1012638924V546709	NWHINZZZTESTPATIENT	NWHINNONE		2019/08/14 11:00:10 CST	2019/05/02	DAYTSHR	View	eHealth Exchange Opt-out	666100001	1012638924V546709	NWHINZZZTESTPATIENT	NWHINNONE		2019/08/14 10:47:47 CST	2019/08/14	Albany VA Medical Center		eHealth Exchange Opt-out	666000001	1012581676V377802	CHDRZZZTESTPATIENT	CHDRNONE		2019/08/13 07:13:17 CST	2018/08/13	ATLANTA VAMC	
Consent Type	SSN	ICN	Last Name	First Name	Middle Name	Entry Date	Signature Date	Authenticating Facility	View																																																														
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SSA Revocation	666100001	1012638924V546709	NWHINZZZTESTPATIENT	NWHINNONE		2019/08/14 11:00:10 CST	2019/05/02	DAYTSHR	View																																																														
eHealth Exchange Opt-out	666100001	1012638924V546709	NWHINZZZTESTPATIENT	NWHINNONE		2019/08/14 10:47:47 CST	2019/08/14	Albany VA Medical Center																																																															
eHealth Exchange Opt-out	666000001	1012581676V377802	CHDRZZZTESTPATIENT	CHDRNONE		2019/08/13 07:13:17 CST	2018/08/13	ATLANTA VAMC																																																															

4.12. Reports – Summary HIE and Consent Reports

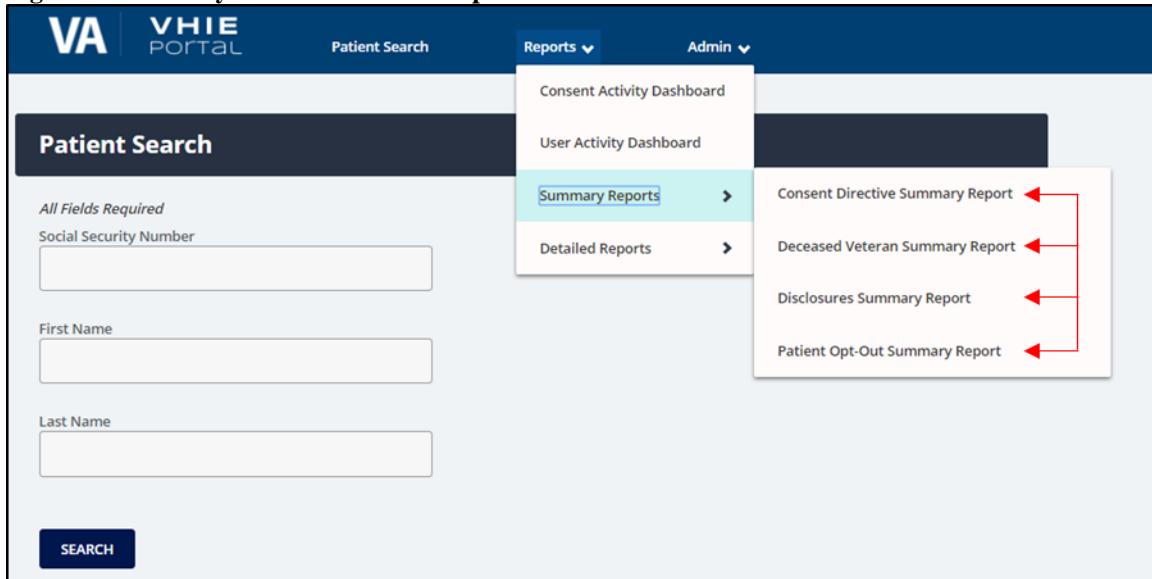
From within the VHIE Portal, a VHIE user can click the “Reports” option at the top of the webpage to select and generate the Summary HIE and Consent Reports. The Summary HIE and Consent Reports includes the following:

- Consent Directive Summary Report
- Deceased Veteran Summary Report
- Disclosures Summary Report
- Patient Opt-Out Summary Report

Prerequisite:

- The user has logged in via SSOi or another VA-approved method for authentication.
- The user has been assigned the appropriate roles to generate VHIE reports.

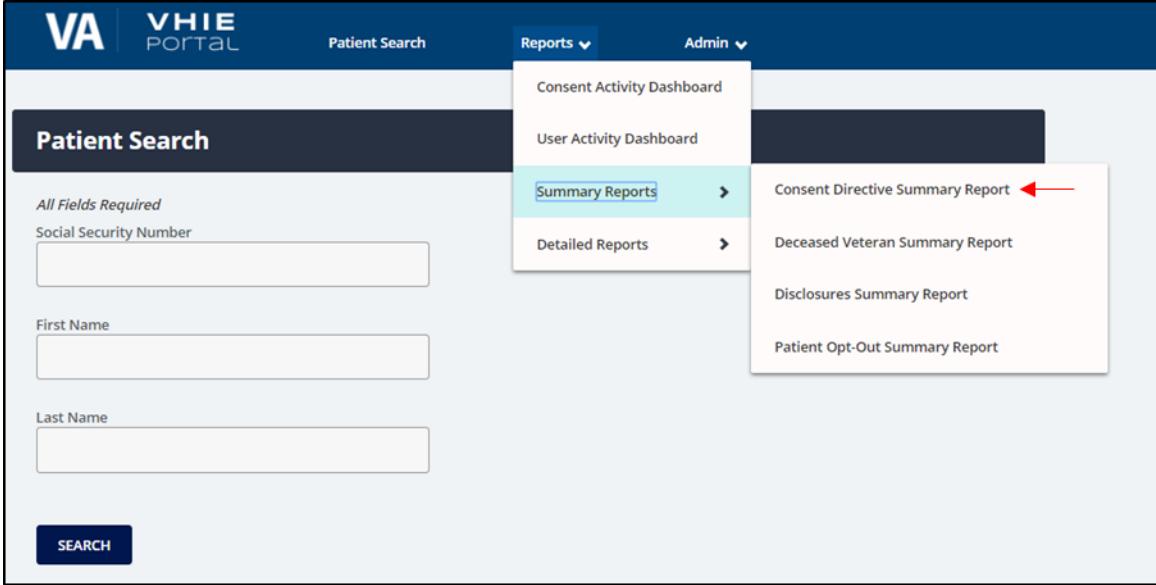
Figure 7: Summary HIE and Consent Report Menu

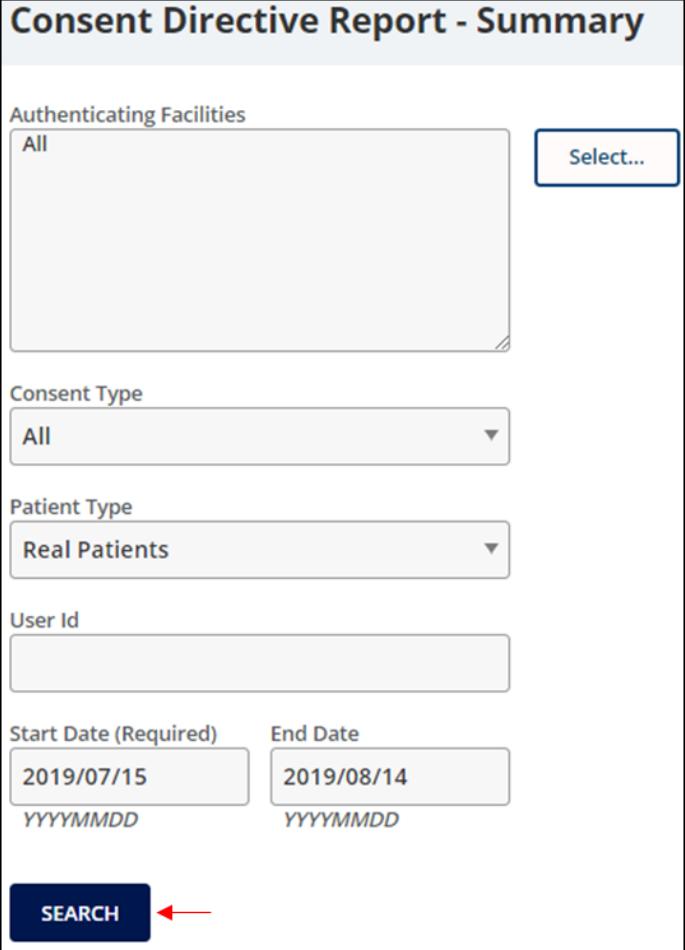


4.12.1. Consent Directive Summary Report

The Consent Directive Summary Report provides a summary listing of the selected Consent Directive totals for a selected range of dates at the selected Authenticating facility or facilities.

Table 17: Consent Directive Summary Report

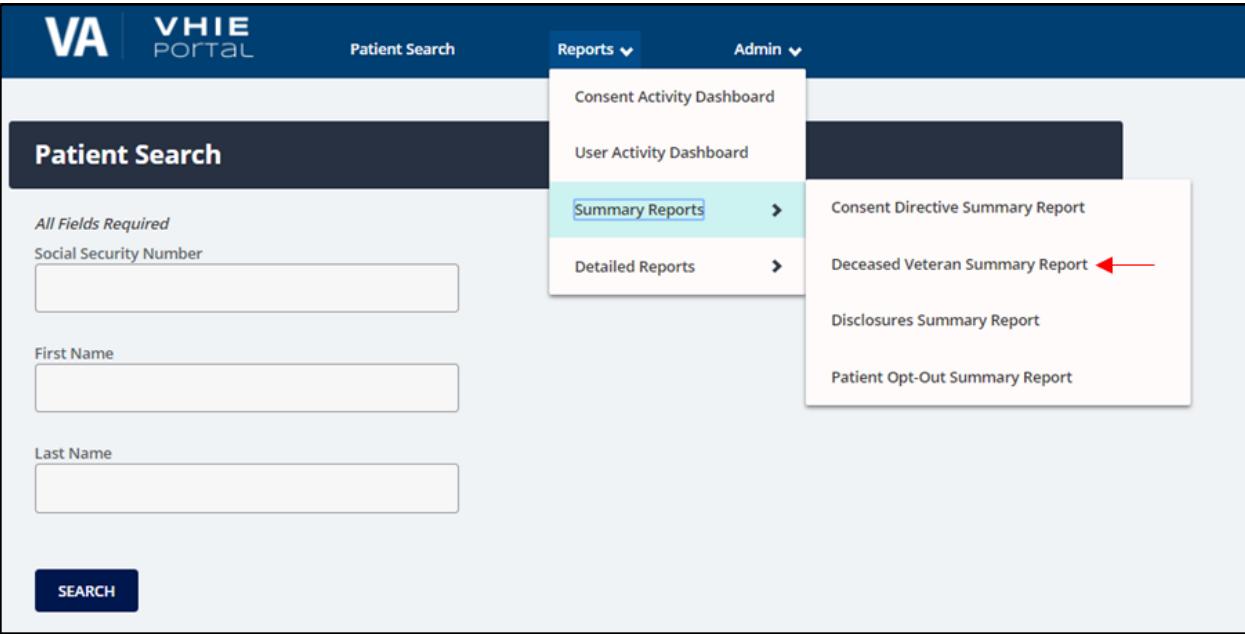
Step	Action
1.	Select Consent Directive Summary Report. 

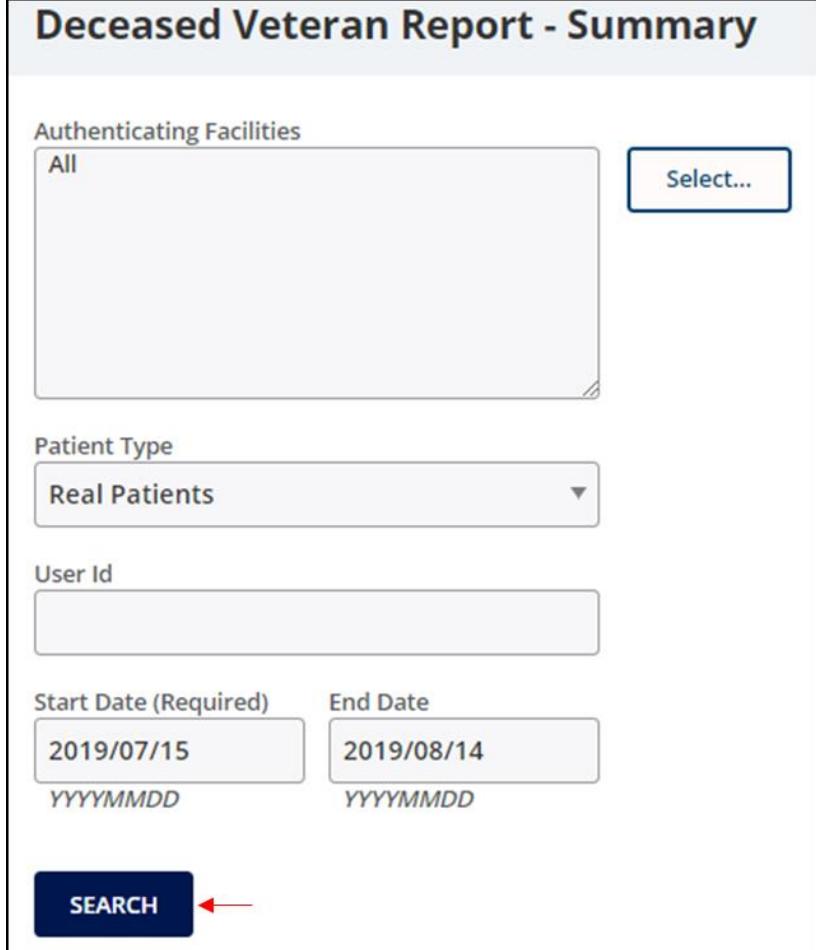
Step	Action																																													
2.	<p>Complete the appropriate search criteria, then click Search.</p> 																																													
3.	<p>In the returned results, the user can export the report to a .CSV file by clicking Export CSV.</p>  <table border="1" data-bbox="323 1347 1568 1727"> <thead> <tr> <th data-bbox="323 1410 502 1431">Authenticating Facility</th> <th data-bbox="731 1410 926 1431">eHealth Exchange Participating</th> <th data-bbox="975 1410 1204 1431">eHealth Exchange Not Participating</th> <th data-bbox="1269 1410 1367 1431">SSA Authorizations</th> <th data-bbox="1400 1410 1547 1431">SSA Revocations</th> </tr> </thead> <tbody> <tr> <td data-bbox="323 1453 502 1474">ALASKA VA HLTCR SYSTEM AVAHS</td><td data-bbox="731 1453 747 1474">7</td><td data-bbox="975 1453 992 1474">8</td><td data-bbox="1269 1453 1286 1474">0</td><td data-bbox="1400 1453 1416 1474">0</td></tr> <tr> <td data-bbox="323 1495 502 1516">Albany VA Medical Center</td><td data-bbox="731 1495 747 1516">1</td><td data-bbox="975 1495 992 1516">7</td><td data-bbox="1269 1495 1286 1516">6</td><td data-bbox="1400 1495 1416 1516">0</td></tr> <tr> <td data-bbox="323 1537 502 1558">ASHEVILLE VAMC</td><td data-bbox="731 1537 747 1558">0</td><td data-bbox="975 1537 992 1558">0</td><td data-bbox="1269 1537 1302 1558">93</td><td data-bbox="1400 1537 1416 1558">0</td></tr> <tr> <td data-bbox="323 1579 502 1600">ATLANTA VAMC</td><td data-bbox="731 1579 747 1600">1</td><td data-bbox="975 1579 992 1600">1</td><td data-bbox="1269 1579 1286 1600">0</td><td data-bbox="1400 1579 1416 1600">0</td></tr> <tr> <td data-bbox="323 1622 502 1643">BATTLE CREEK VA MEDICAL CENTER</td><td data-bbox="731 1622 747 1643">0</td><td data-bbox="975 1622 992 1643">1</td><td data-bbox="1269 1622 1286 1643">0</td><td data-bbox="1400 1622 1416 1643">0</td></tr> <tr> <td data-bbox="323 1664 502 1685">BOISE VAMROC</td><td data-bbox="731 1664 747 1685">1</td><td data-bbox="975 1664 992 1685">0</td><td data-bbox="1269 1664 1286 1685">0</td><td data-bbox="1400 1664 1416 1685">0</td></tr> <tr> <td data-bbox="323 1706 502 1727">BRANSON CBOC</td><td data-bbox="731 1706 747 1727">0</td><td data-bbox="975 1706 992 1727">0</td><td data-bbox="1269 1706 1286 1727">2</td><td data-bbox="1400 1706 1416 1727">0</td></tr> <tr> <td data-bbox="323 1748 502 1769">CHYSHR</td><td data-bbox="731 1748 747 1769">6</td><td data-bbox="975 1748 992 1769">6</td><td data-bbox="1269 1748 1286 1769">6</td><td data-bbox="1400 1748 1416 1769">0</td></tr> </tbody> </table>	Authenticating Facility	eHealth Exchange Participating	eHealth Exchange Not Participating	SSA Authorizations	SSA Revocations	ALASKA VA HLTCR SYSTEM AVAHS	7	8	0	0	Albany VA Medical Center	1	7	6	0	ASHEVILLE VAMC	0	0	93	0	ATLANTA VAMC	1	1	0	0	BATTLE CREEK VA MEDICAL CENTER	0	1	0	0	BOISE VAMROC	1	0	0	0	BRANSON CBOC	0	0	2	0	CHYSHR	6	6	6	0
Authenticating Facility	eHealth Exchange Participating	eHealth Exchange Not Participating	SSA Authorizations	SSA Revocations																																										
ALASKA VA HLTCR SYSTEM AVAHS	7	8	0	0																																										
Albany VA Medical Center	1	7	6	0																																										
ASHEVILLE VAMC	0	0	93	0																																										
ATLANTA VAMC	1	1	0	0																																										
BATTLE CREEK VA MEDICAL CENTER	0	1	0	0																																										
BOISE VAMROC	1	0	0	0																																										
BRANSON CBOC	0	0	2	0																																										
CHYSHR	6	6	6	0																																										

4.12.2. Deceased Veterans Summary Report

The Deceased Veterans Summary Report provides numerical summary of deceased patients for a selected range of dates at specific combinations of selected eHealth Exchange organizations and Patient Preferred facilities.

Table 18: Deceased Veterans Summary Report

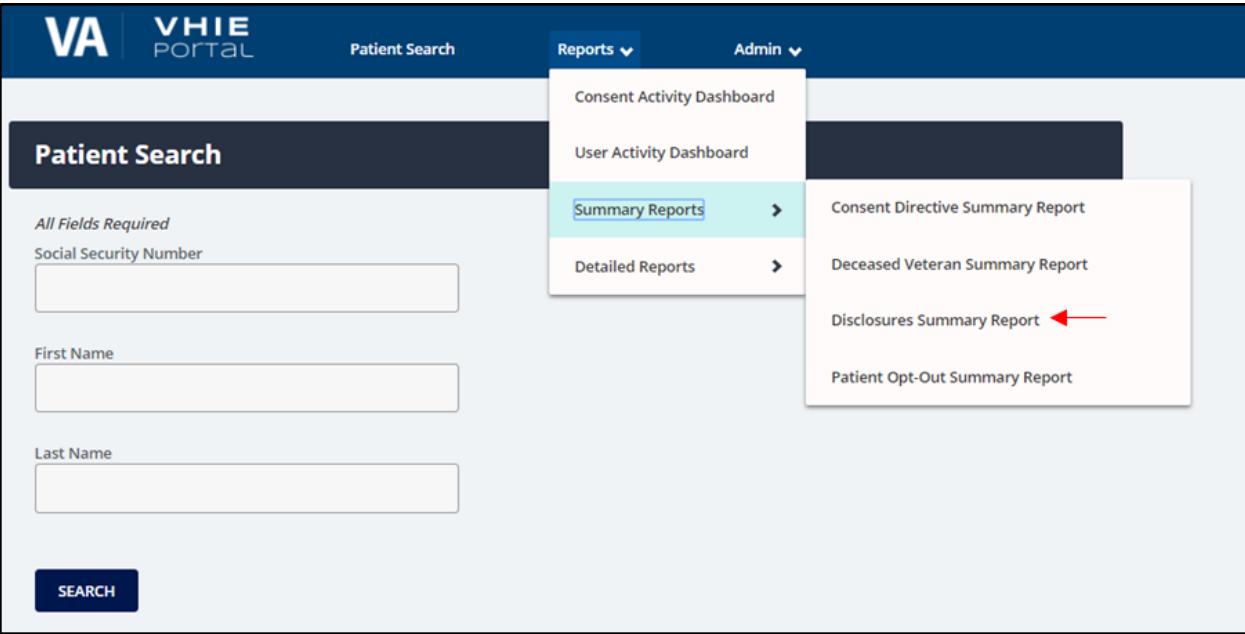
Step	Action
1.	Select Deceased Veteran Summary Report. 

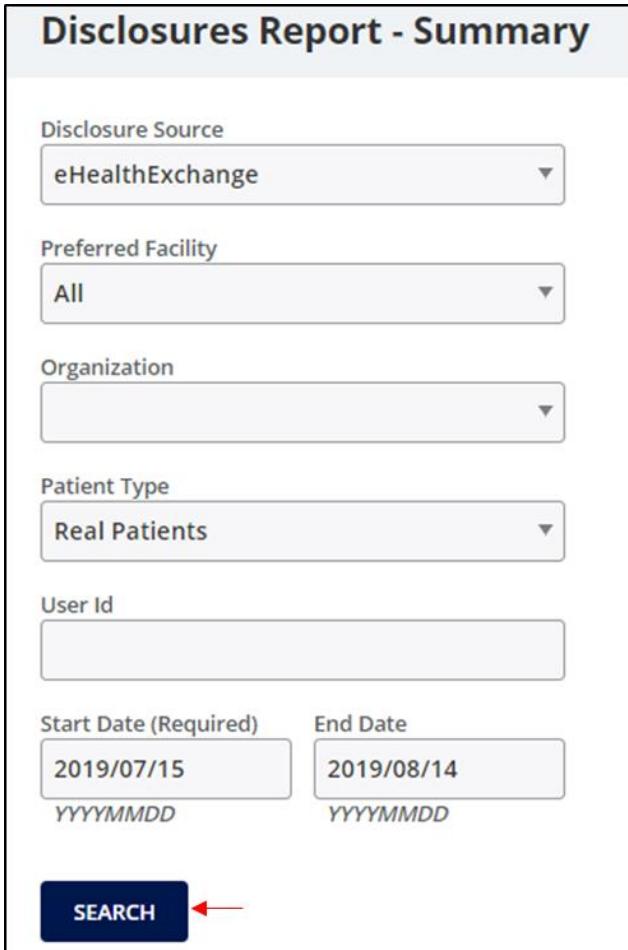
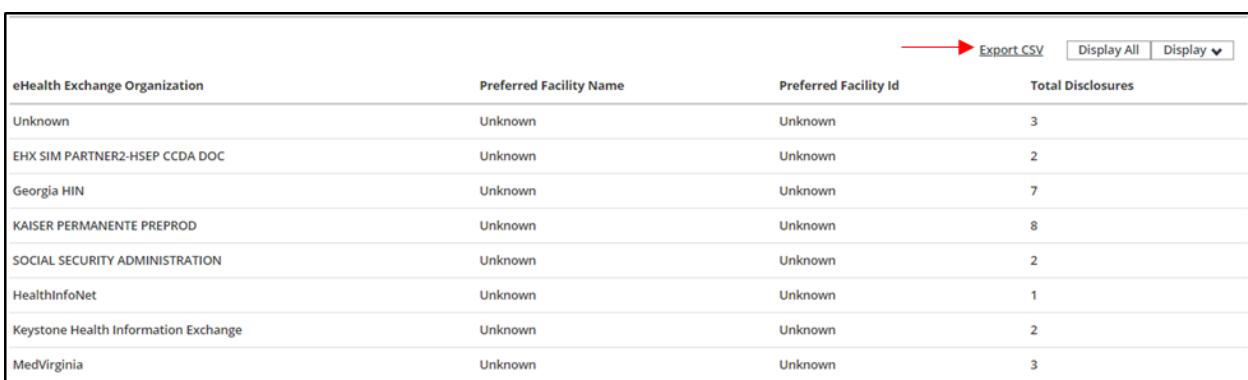
Step	Action																																																							
2.	<p>Complete the appropriate search criteria, then click Search.</p> 																																																							
3.	<p>In the returned results, the user can export the report to a .CSV file by clicking Export CSV.</p>  <table border="1" data-bbox="316 1339 1568 1797"> <thead> <tr> <th data-bbox="316 1402 502 1423">Authenticating Facility</th> <th data-bbox="731 1402 943 1423">eHealth Exchange Participating</th> <th data-bbox="992 1402 1220 1423">eHealth Exchange Not Participating</th> <th data-bbox="1286 1402 1400 1423">SSA Authorizations</th> <th data-bbox="1449 1402 1547 1423">SSA Revocations</th> </tr> </thead> <tbody> <tr> <td data-bbox="316 1444 528 1465">ALASKA VA HILCR SYSTEM AVAHS</td><td data-bbox="731 1444 747 1465">7</td><td data-bbox="992 1444 1008 1465">8</td><td data-bbox="1286 1444 1302 1465">0</td><td data-bbox="1449 1444 1465 1465">0</td></tr> <tr> <td data-bbox="316 1486 496 1507">Albany VA Medical Center</td><td data-bbox="731 1486 747 1507">1</td><td data-bbox="992 1486 1008 1507">7</td><td data-bbox="1286 1486 1302 1507">6</td><td data-bbox="1449 1486 1465 1507">4</td></tr> <tr> <td data-bbox="316 1529 430 1550">ASHEVILLE VAMC</td><td data-bbox="731 1529 747 1550">0</td><td data-bbox="992 1529 1008 1550">0</td><td data-bbox="1286 1529 1318 1550">93</td><td data-bbox="1449 1529 1465 1550">78</td></tr> <tr> <td data-bbox="316 1571 430 1592">ATLANTA VAMC</td><td data-bbox="731 1571 747 1592">1</td><td data-bbox="992 1571 1008 1592">1</td><td data-bbox="1286 1571 1302 1592">0</td><td data-bbox="1449 1571 1465 1592">0</td></tr> <tr> <td data-bbox="316 1613 545 1634">BATTLE CREEK VA MEDICAL CENTER</td><td data-bbox="731 1613 747 1634">0</td><td data-bbox="992 1613 1008 1634">1</td><td data-bbox="1286 1613 1302 1634">0</td><td data-bbox="1449 1613 1465 1634">0</td></tr> <tr> <td data-bbox="316 1655 430 1676">BOISE VAMROC</td><td data-bbox="731 1655 747 1676">1</td><td data-bbox="992 1655 1008 1676">0</td><td data-bbox="1286 1655 1302 1676">0</td><td data-bbox="1449 1655 1465 1676">0</td></tr> <tr> <td data-bbox="316 1698 430 1719">BRANSON CBOC</td><td data-bbox="731 1698 747 1719">0</td><td data-bbox="992 1698 1008 1719">0</td><td data-bbox="1286 1698 1318 1719">2</td><td data-bbox="1449 1698 1465 1719">1</td></tr> <tr> <td data-bbox="316 1740 381 1761">CHYSHR</td><td data-bbox="731 1740 747 1761">6</td><td data-bbox="992 1740 1008 1761">6</td><td data-bbox="1286 1740 1318 1761">6</td><td data-bbox="1449 1740 1465 1761">4</td></tr> <tr> <td data-bbox="316 1782 447 1803">DAYTON OH VAMC</td><td data-bbox="731 1782 747 1803">0</td><td data-bbox="992 1782 1008 1803">0</td><td data-bbox="1286 1782 1318 1803">10</td><td data-bbox="1449 1782 1465 1803">11</td></tr> <tr> <td data-bbox="316 1824 381 1845">DAYTSHR</td><td data-bbox="731 1824 747 1845">1</td><td data-bbox="992 1824 1008 1845">1</td><td data-bbox="1286 1824 1318 1845">43</td><td data-bbox="1449 1824 1465 1845">16</td></tr> </tbody> </table>	Authenticating Facility	eHealth Exchange Participating	eHealth Exchange Not Participating	SSA Authorizations	SSA Revocations	ALASKA VA HILCR SYSTEM AVAHS	7	8	0	0	Albany VA Medical Center	1	7	6	4	ASHEVILLE VAMC	0	0	93	78	ATLANTA VAMC	1	1	0	0	BATTLE CREEK VA MEDICAL CENTER	0	1	0	0	BOISE VAMROC	1	0	0	0	BRANSON CBOC	0	0	2	1	CHYSHR	6	6	6	4	DAYTON OH VAMC	0	0	10	11	DAYTSHR	1	1	43	16
Authenticating Facility	eHealth Exchange Participating	eHealth Exchange Not Participating	SSA Authorizations	SSA Revocations																																																				
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CHYSHR	6	6	6	4																																																				
DAYTON OH VAMC	0	0	10	11																																																				
DAYTSHR	1	1	43	16																																																				

4.12.3. Disclosures Summary Report

The Disclosures Summary Report provides a numerical summary of the disclosures for a selected range of dates at specific combinations of selected eHealth Exchange organizations and Patient Preferred facilities.

Table 19: Disclosures Summary Report

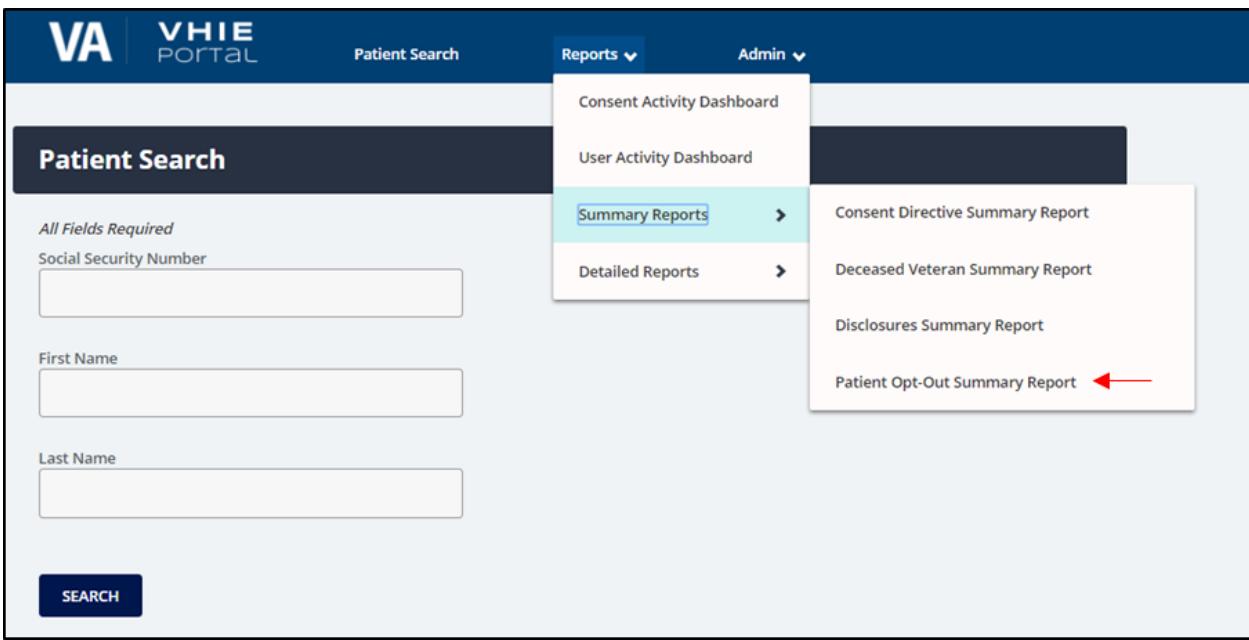
Step	Action
1.	Select Disclosures Summary Report Report.  <p>The screenshot shows the VHIE Portal interface. At the top, there is a navigation bar with the VA logo, the VHIE PORTAL name, a Patient Search button, a Reports dropdown menu, and an Admin dropdown menu. The Reports menu is open, displaying several options: Consent Activity Dashboard, User Activity Dashboard, Summary Reports (which is highlighted with a blue background), Detailed Reports, Consent Directive Summary Report, Deceased Veteran Summary Report, Disclosures Summary Report (which has a red arrow pointing to it), and Patient Opt-Out Summary Report.</p>

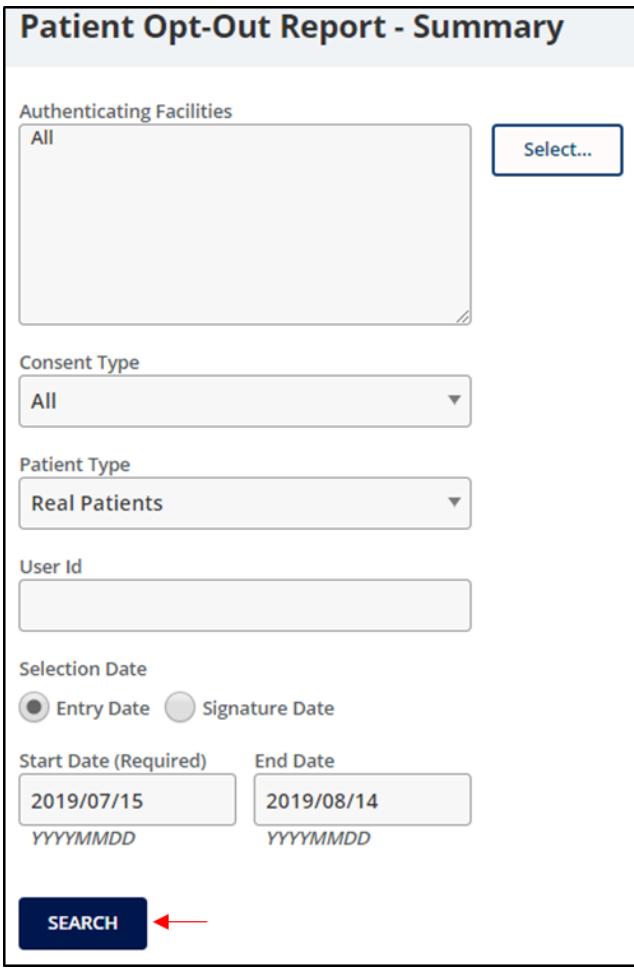
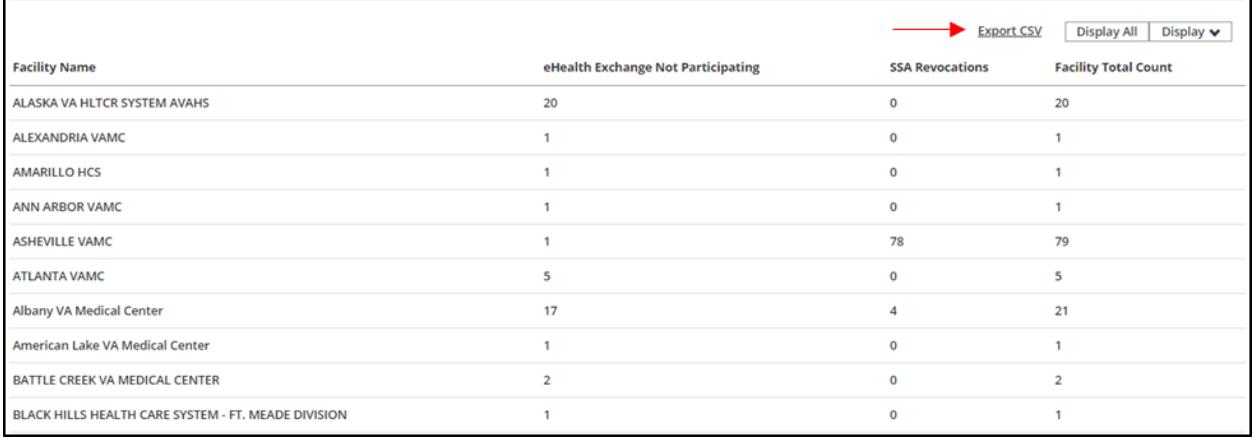
Step	Action																																				
2.	<p>Complete the appropriate search criteria, then click Search.</p> 																																				
3.	<p>In the returned results, the user can export the report to a .CSV file by clicking Export CSV.</p>  <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; padding: 5px;">eHealth Exchange Organization</th> <th style="text-align: left; padding: 5px;">Preferred Facility Name</th> <th style="text-align: left; padding: 5px;">Preferred Facility Id</th> <th style="text-align: left; padding: 5px;">Total Disclosures</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">Unknown</td><td style="padding: 5px;">Unknown</td><td style="padding: 5px;">Unknown</td><td style="padding: 5px;">3</td></tr> <tr> <td style="padding: 5px;">EXH SIM PARTNER2-HSEP CCDA DOC</td><td style="padding: 5px;">Unknown</td><td style="padding: 5px;">Unknown</td><td style="padding: 5px;">2</td></tr> <tr> <td style="padding: 5px;">Georgia HIN</td><td style="padding: 5px;">Unknown</td><td style="padding: 5px;">Unknown</td><td style="padding: 5px;">7</td></tr> <tr> <td style="padding: 5px;">KAI SER PERMANENTE PREPROD</td><td style="padding: 5px;">Unknown</td><td style="padding: 5px;">Unknown</td><td style="padding: 5px;">8</td></tr> <tr> <td style="padding: 5px;">SOCIAL SECURITY ADMINISTRATION</td><td style="padding: 5px;">Unknown</td><td style="padding: 5px;">Unknown</td><td style="padding: 5px;">2</td></tr> <tr> <td style="padding: 5px;">HealthInfoNet</td><td style="padding: 5px;">Unknown</td><td style="padding: 5px;">Unknown</td><td style="padding: 5px;">1</td></tr> <tr> <td style="padding: 5px;">Keystone Health Information Exchange</td><td style="padding: 5px;">Unknown</td><td style="padding: 5px;">Unknown</td><td style="padding: 5px;">2</td></tr> <tr> <td style="padding: 5px;">MedVirginia</td><td style="padding: 5px;">Unknown</td><td style="padding: 5px;">Unknown</td><td style="padding: 5px;">3</td></tr> </tbody> </table>	eHealth Exchange Organization	Preferred Facility Name	Preferred Facility Id	Total Disclosures	Unknown	Unknown	Unknown	3	EXH SIM PARTNER2-HSEP CCDA DOC	Unknown	Unknown	2	Georgia HIN	Unknown	Unknown	7	KAI SER PERMANENTE PREPROD	Unknown	Unknown	8	SOCIAL SECURITY ADMINISTRATION	Unknown	Unknown	2	HealthInfoNet	Unknown	Unknown	1	Keystone Health Information Exchange	Unknown	Unknown	2	MedVirginia	Unknown	Unknown	3
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MedVirginia	Unknown	Unknown	3																																		

4.12.4. Patient Opt-out Summary Report

The Patient Opt-out Summary Report provides a summary listing of patients that are opt-out of sharing.

Table 20: Patient Opt-out Summary Report

Step	Action
1.	Select Patient Opt-Out Summary Report. 

Step	Action																																												
2.	<p>Complete the appropriate search criteria, then click Search.</p> 																																												
3.	<p>In the returned results, the user can export the report to a .CSV file by clicking Export CSV.</p>  <table border="1"> <thead> <tr> <th data-bbox="319 1402 801 1431">Facility Name</th> <th data-bbox="801 1402 1144 1431">eHealth Exchange Not Participating</th> <th data-bbox="1144 1402 1307 1431">SSA Revocations</th> <th data-bbox="1307 1402 1573 1431">Facility Total Count</th> </tr> </thead> <tbody> <tr> <td data-bbox="319 1442 801 1472">ALASKA VA HLTR SYSTEM AVAHS</td> <td data-bbox="801 1442 1144 1472">20</td> <td data-bbox="1144 1442 1307 1472">0</td> <td data-bbox="1307 1442 1573 1472">20</td> </tr> <tr> <td data-bbox="319 1482 801 1512">ALEXANDRIA VAMC</td> <td data-bbox="801 1482 1144 1512">1</td> <td data-bbox="1144 1482 1307 1512">0</td> <td data-bbox="1307 1482 1573 1512">1</td> </tr> <tr> <td data-bbox="319 1522 801 1552">AMARILLO HCS</td> <td data-bbox="801 1522 1144 1552">1</td> <td data-bbox="1144 1522 1307 1552">0</td> <td data-bbox="1307 1522 1573 1552">1</td> </tr> <tr> <td data-bbox="319 1562 801 1592">ANN ARBOR VAMC</td> <td data-bbox="801 1562 1144 1592">1</td> <td data-bbox="1144 1562 1307 1592">0</td> <td data-bbox="1307 1562 1573 1592">1</td> </tr> <tr> <td data-bbox="319 1603 801 1632">ASHEVILLE VAMC</td> <td data-bbox="801 1603 1144 1632">1</td> <td data-bbox="1144 1603 1307 1632">78</td> <td data-bbox="1307 1603 1573 1632">79</td> </tr> <tr> <td data-bbox="319 1643 801 1672">ATLANTA VAMC</td> <td data-bbox="801 1643 1144 1672">5</td> <td data-bbox="1144 1643 1307 1672">0</td> <td data-bbox="1307 1643 1573 1672">5</td> </tr> <tr> <td data-bbox="319 1683 801 1712">Albany VA Medical Center</td> <td data-bbox="801 1683 1144 1712">17</td> <td data-bbox="1144 1683 1307 1712">4</td> <td data-bbox="1307 1683 1573 1712">21</td> </tr> <tr> <td data-bbox="319 1723 801 1752">American Lake VA Medical Center</td> <td data-bbox="801 1723 1144 1752">1</td> <td data-bbox="1144 1723 1307 1752">0</td> <td data-bbox="1307 1723 1573 1752">1</td> </tr> <tr> <td data-bbox="319 1763 801 1793">BATTLE CREEK VA MEDICAL CENTER</td> <td data-bbox="801 1763 1144 1793">2</td> <td data-bbox="1144 1763 1307 1793">0</td> <td data-bbox="1307 1763 1573 1793">2</td> </tr> <tr> <td data-bbox="319 1803 801 1833">BLACK HILLS HEALTH CARE SYSTEM - FT. MEADE DIVISION</td> <td data-bbox="801 1803 1144 1833">1</td> <td data-bbox="1144 1803 1307 1833">0</td> <td data-bbox="1307 1803 1573 1833">1</td> </tr> </tbody> </table>	Facility Name	eHealth Exchange Not Participating	SSA Revocations	Facility Total Count	ALASKA VA HLTR SYSTEM AVAHS	20	0	20	ALEXANDRIA VAMC	1	0	1	AMARILLO HCS	1	0	1	ANN ARBOR VAMC	1	0	1	ASHEVILLE VAMC	1	78	79	ATLANTA VAMC	5	0	5	Albany VA Medical Center	17	4	21	American Lake VA Medical Center	1	0	1	BATTLE CREEK VA MEDICAL CENTER	2	0	2	BLACK HILLS HEALTH CARE SYSTEM - FT. MEADE DIVISION	1	0	1
Facility Name	eHealth Exchange Not Participating	SSA Revocations	Facility Total Count																																										
ALASKA VA HLTR SYSTEM AVAHS	20	0	20																																										
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BATTLE CREEK VA MEDICAL CENTER	2	0	2																																										
BLACK HILLS HEALTH CARE SYSTEM - FT. MEADE DIVISION	1	0	1																																										

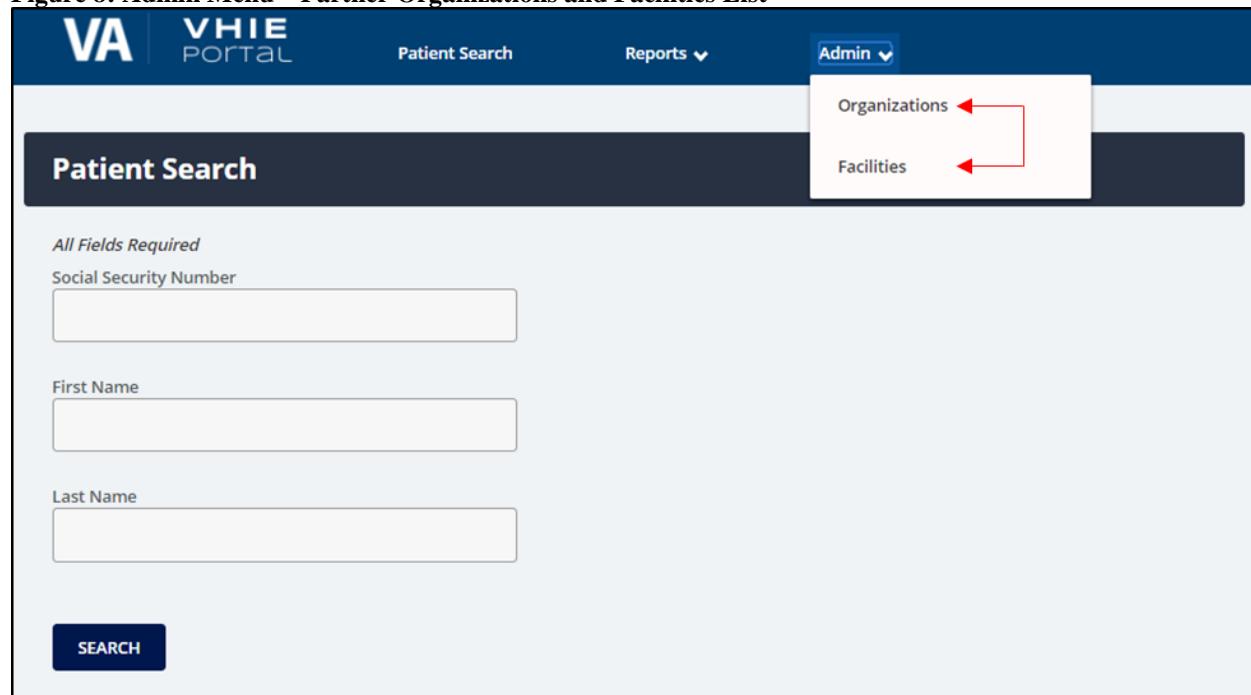
4.13. Admin Menu – Partner Organizations and Facilities List

From within the VHIE Portal, a VHIE user can click the “Admin” at the top of the webpage to access and modify the list of Partner Organizations and Facilities.

Prerequisite:

- The user has logged in via SSOi or another VA-approved method for authentication.
- The user has been assigned the appropriate roles to access and modify the list of Partner Organizations and VA Facilities.

Figure 8: Admin Menu – Partner Organizations and Facilities List



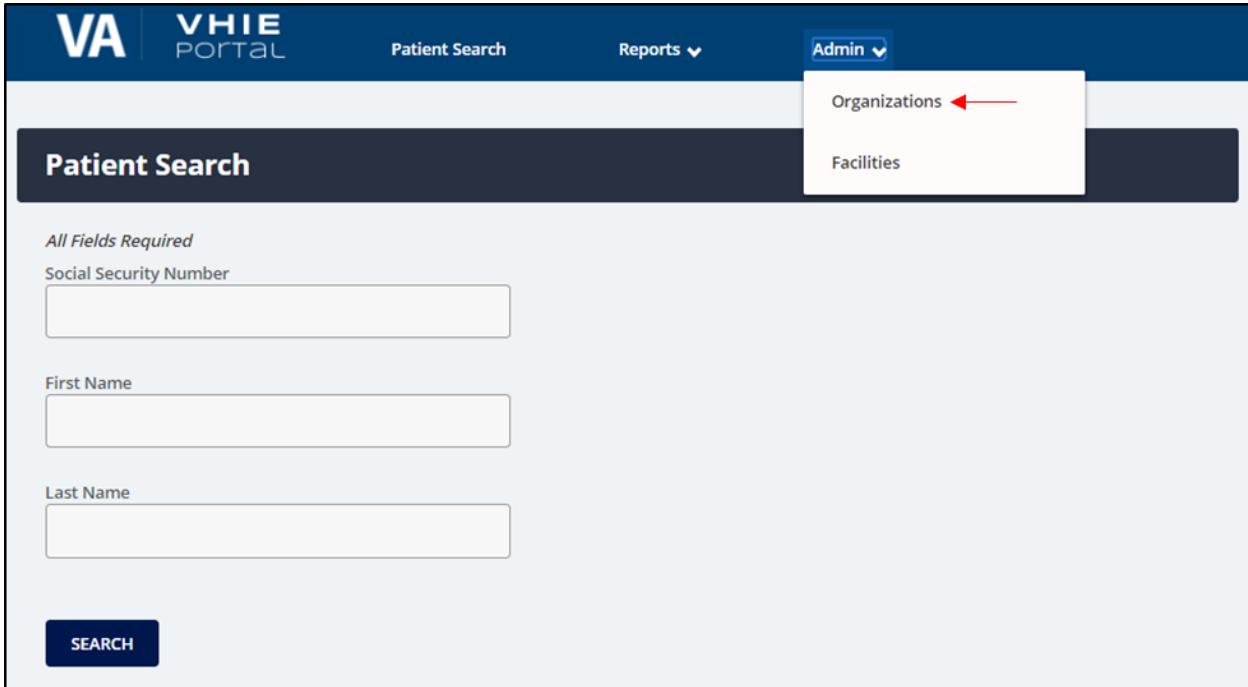
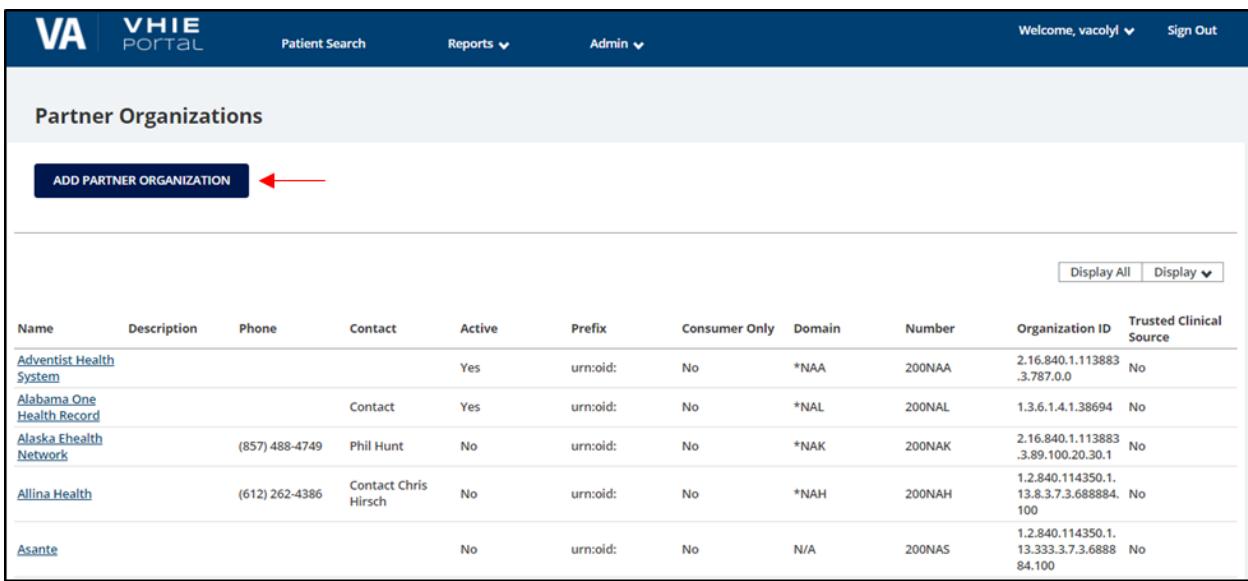
4.13.1. Access or Modify Partner Organizations List

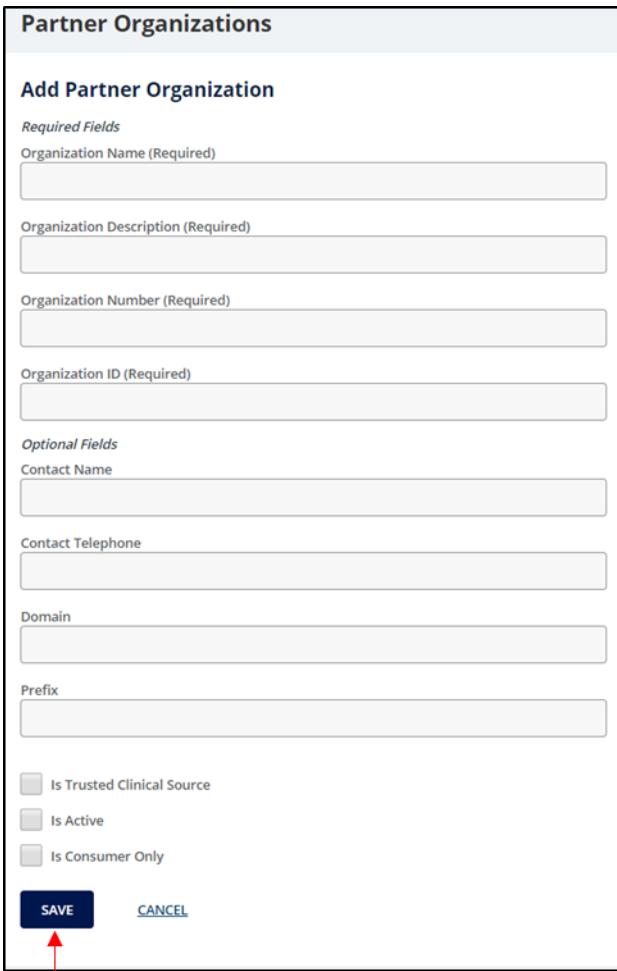
The VHIE admin user can access the list of Partner Organizations to view, edit, delete, or add new organizations.

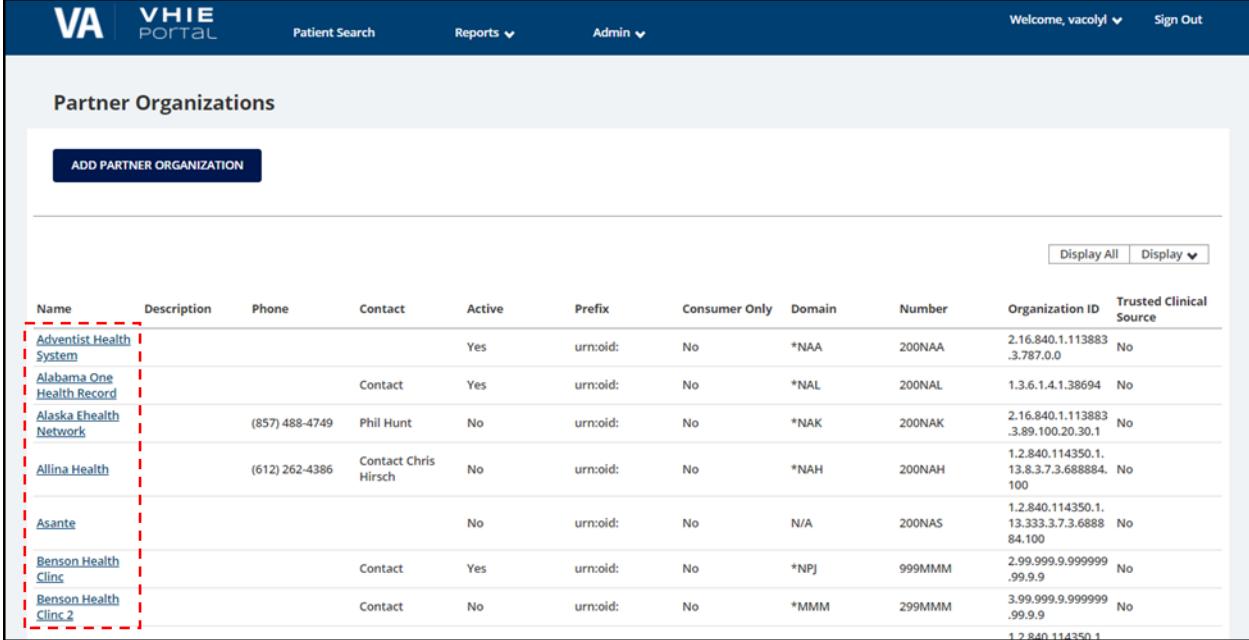
Prerequisite:

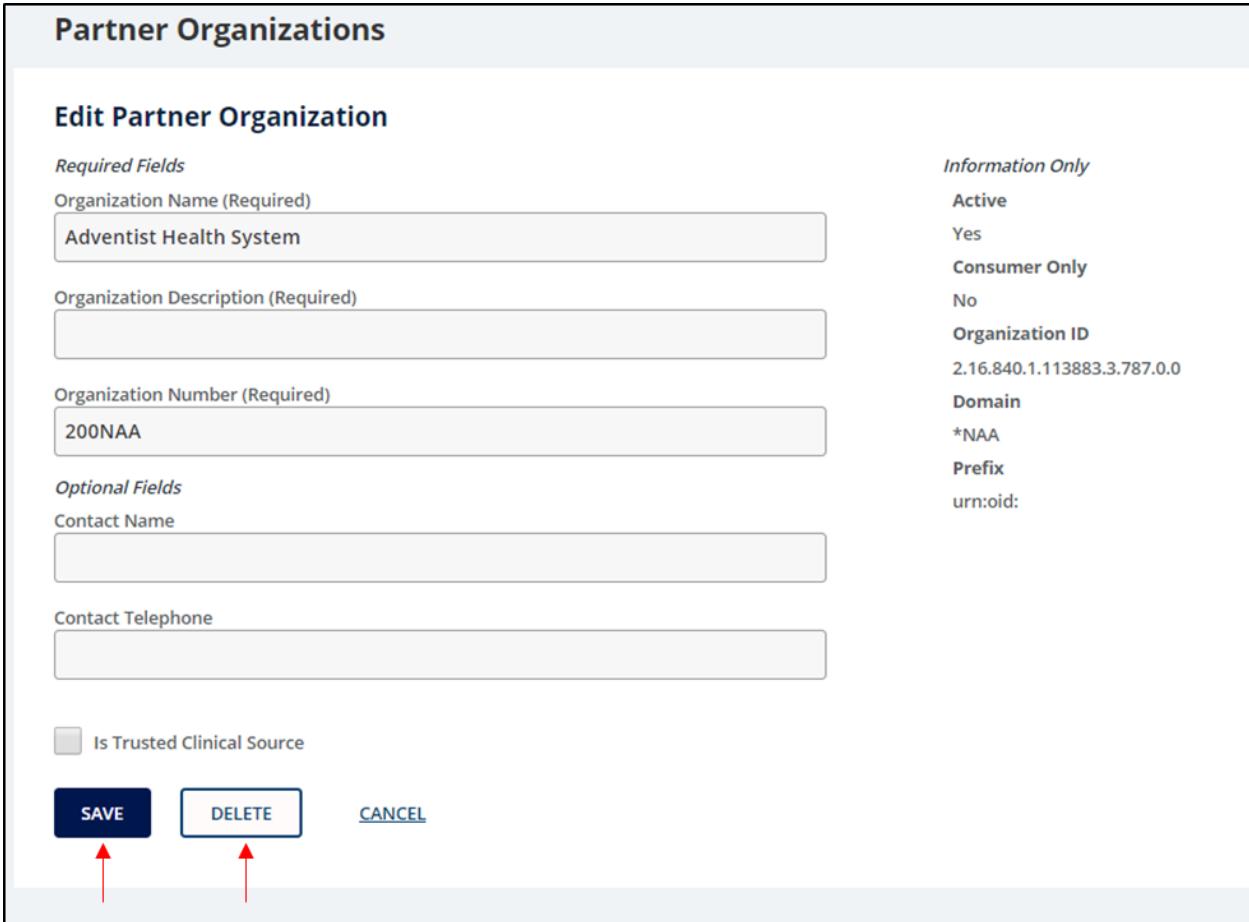
- The user has logged in via SSOi or another VA-approved method for authentication.
- The user is provided with elevated admin privileges to access and modify the list of Partner Organizations.

Table 21: Access or Modify Partner Organizations List

Step	Action																																																																		
1.	<p>Select Organizations.</p> 																																																																		
2.	<p>To add a new Partner Organization, click Add Partner Organization.</p>  <table border="1" data-bbox="318 1425 1566 1689"> <thead> <tr> <th>Name</th> <th>Description</th> <th>Phone</th> <th>Contact</th> <th>Active</th> <th>Prefix</th> <th>Consumer Only</th> <th>Domain</th> <th>Number</th> <th>Organization ID</th> <th>Trusted Clinical Source</th> </tr> </thead> <tbody> <tr> <td>Adventist Health System</td> <td></td> <td></td> <td></td> <td>Yes</td> <td>urn:oid:</td> <td>No</td> <td>*NAA</td> <td>200NAA</td> <td>2.16.840.1.113883 .3.787.0.0</td> <td>No</td> </tr> <tr> <td>Alabama One Health Record</td> <td></td> <td></td> <td>Contact</td> <td>Yes</td> <td>urn:oid:</td> <td>No</td> <td>*NAL</td> <td>200NAL</td> <td>1.3.6.1.4.1.38694</td> <td>No</td> </tr> <tr> <td>Alaska Health Network</td> <td>(857) 488-4749</td> <td></td> <td>Phil Hunt</td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>*NAK</td> <td>200NAK</td> <td>2.16.840.1.113883 .3.89.100.20.30.1</td> <td>No</td> </tr> <tr> <td>Allina Health</td> <td>(612) 262-4386</td> <td></td> <td>Contact Chris Hirsch</td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>*NAH</td> <td>200NAH</td> <td>1.2.840.114350.1. 13.8.3.7.3.688884. No 100</td> <td>No</td> </tr> <tr> <td>Asante</td> <td></td> <td></td> <td></td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>N/A</td> <td>200NAS</td> <td>1.2.840.114350.1. 13.333.3.7.3.68888 No 84.100</td> <td>No</td> </tr> </tbody> </table>	Name	Description	Phone	Contact	Active	Prefix	Consumer Only	Domain	Number	Organization ID	Trusted Clinical Source	Adventist Health System				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 Health 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	(612) 262-4386		Contact Chris Hirsch	No	urn:oid:	No	*NAH	200NAH	1.2.840.114350.1. 13.8.3.7.3.688884. No 100	No	Asante				No	urn:oid:	No	N/A	200NAS	1.2.840.114350.1. 13.333.3.7.3.68888 No 84.100	No
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Step	Action
3.	<p>Complete the appropriate required fields, then click Save to add the new Partner Organization.</p>  <p>Partner Organizations</p> <p>Add Partner Organization</p> <p><i>Required Fields</i></p> <p>Organization Name (Required) <input type="text"/></p> <p>Organization Description (Required) <input type="text"/></p> <p>Organization Number (Required) <input type="text"/></p> <p>Organization ID (Required) <input type="text"/></p> <p><i>Optional Fields</i></p> <p>Contact Name <input type="text"/></p> <p>Contact Telephone <input type="text"/></p> <p>Domain <input type="text"/></p> <p>Prefix <input type="text"/></p> <p><input type="checkbox"/> Is Trusted Clinical Source <input type="checkbox"/> Is Active <input type="checkbox"/> Is Consumer Only</p> <p>SAVE CANCEL</p>

Step	Action																																																																																															
4.	<p>To edit or delete an existing Partner Organization, click on the targeted organization name.</p>  <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name</th> <th>Description</th> <th>Phone</th> <th>Contact</th> <th>Active</th> <th>Prefix</th> <th>Consumer Only</th> <th>Domain</th> <th>Number</th> <th>Organization ID</th> <th>Trusted Clinical Source</th> </tr> </thead> <tbody> <tr> <td>Adventist Health System</td> <td></td> <td></td> <td></td> <td>Yes</td> <td>urn:oid:</td> <td>No</td> <td>*NAA</td> <td>200NAA</td> <td>2.16.840.1.113883 3.787.0.0</td> <td>No</td> </tr> <tr> <td>Alabama One Health Record</td> <td></td> <td></td> <td>Contact</td> <td>Yes</td> <td>urn:oid:</td> <td>No</td> <td>*NAL</td> <td>200NAL</td> <td>1.3.6.1.4.1.38694</td> <td>No</td> </tr> <tr> <td>Alaska Ehealth Network</td> <td>(857) 488-4749</td> <td>Phil Hunt</td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>*NAK</td> <td>200NAK</td> <td>2.16.840.1.113883 3.89.100.20.30.1</td> <td>No</td> </tr> <tr> <td>Allina Health</td> <td>(612) 262-4386</td> <td>Contact Chris Hirsch</td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>*NAH</td> <td>200NAH</td> <td>1.2.840.114350.1. 13.8.3.7.3.68884. No 100</td> <td>No</td> </tr> <tr> <td>Asante</td> <td></td> <td></td> <td></td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>N/A</td> <td>200NAS</td> <td>1.2.840.114350.1. 13.333.3.7.3.6888 84.100</td> <td>No</td> </tr> <tr> <td>Benson Health Clinic</td> <td></td> <td>Contact</td> <td>Yes</td> <td>urn:oid:</td> <td>No</td> <td>*NPJ</td> <td>999MMM</td> <td>2.99.999.9.999999 .99.9.9</td> <td>No</td> </tr> <tr> <td>Benson Health Clinic 2</td> <td></td> <td>Contact</td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>*MMM</td> <td>299MMM</td> <td>3.99.999.9.999999 .99.9.9</td> <td>No</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>1.2.840.114350.1</td> <td></td> </tr> </tbody> </table>	Name	Description	Phone	Contact	Active	Prefix	Consumer Only	Domain	Number	Organization ID	Trusted Clinical Source	Adventist Health System				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	(612) 262-4386	Contact Chris Hirsch	No	urn:oid:	No	*NAH	200NAH	1.2.840.114350.1. 13.8.3.7.3.68884. No 100	No	Asante				No	urn:oid:	No	N/A	200NAS	1.2.840.114350.1. 13.333.3.7.3.6888 84.100	No	Benson Health Clinic		Contact	Yes	urn:oid:	No	*NPJ	999MMM	2.99.999.9.999999 .99.9.9	No	Benson Health Clinic 2		Contact	No	urn:oid:	No	*MMM	299MMM	3.99.999.9.999999 .99.9.9	No										1.2.840.114350.1	
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									1.2.840.114350.1																																																																																							

Step	Action											
5.	<p>Complete the appropriate required fields and click Save to edit the organization or click Delete to remove the organization from the list.</p>  <table border="0" data-bbox="1258 487 1514 846"> <tr> <td><i>Information Only</i></td> </tr> <tr> <td>Active</td> </tr> <tr> <td>Yes</td> </tr> <tr> <td>Consumer Only</td> </tr> <tr> <td>No</td> </tr> <tr> <td>Organization ID</td> </tr> <tr> <td>2.16.840.1.113883.3.787.0.0</td> </tr> <tr> <td>Domain</td> </tr> <tr> <td>*NAA</td> </tr> <tr> <td>Prefix</td> </tr> <tr> <td>urn:oid:</td> </tr> </table>	<i>Information Only</i>	Active	Yes	Consumer Only	No	Organization ID	2.16.840.1.113883.3.787.0.0	Domain	*NAA	Prefix	urn:oid:
<i>Information Only</i>												
Active												
Yes												
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2.16.840.1.113883.3.787.0.0												
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Prefix												
urn:oid:												

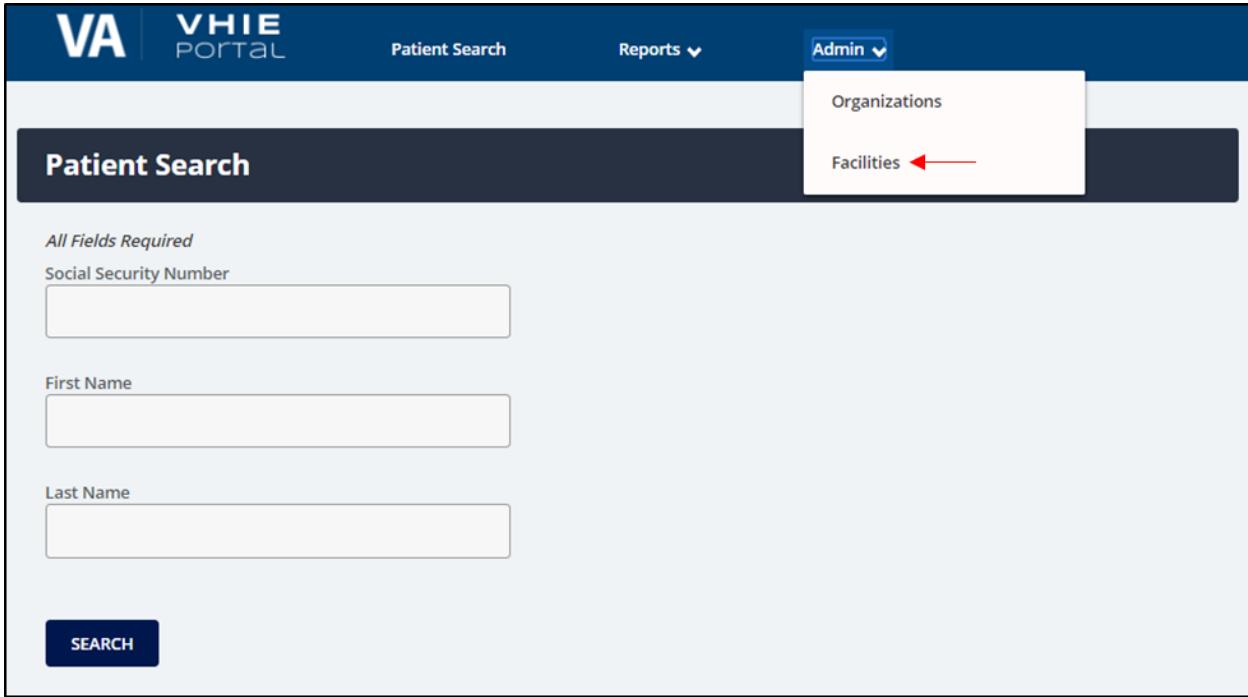
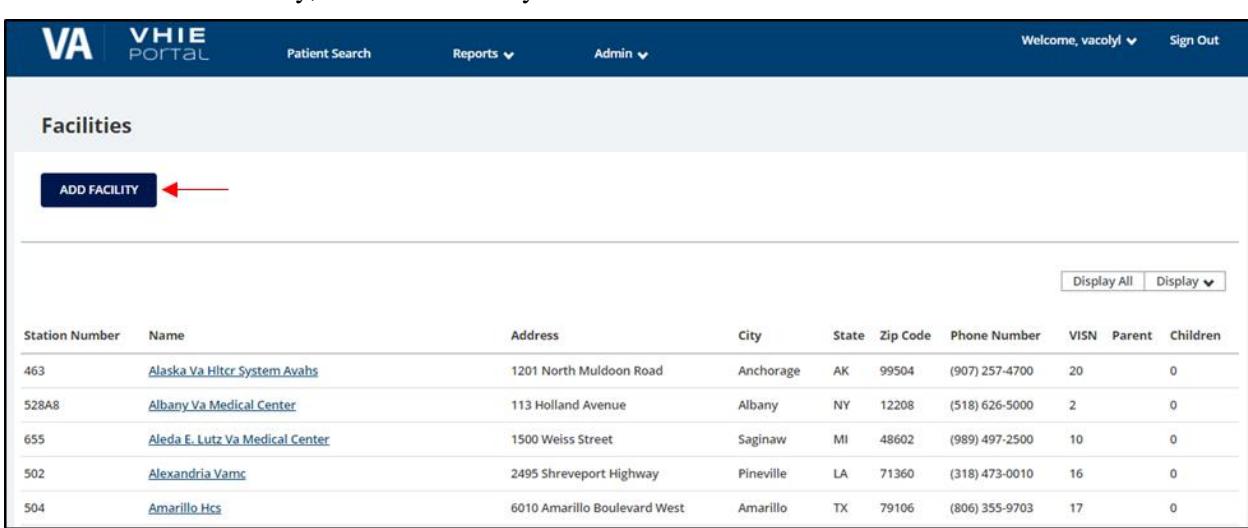
4.13.2. Access or Modify Facilities List

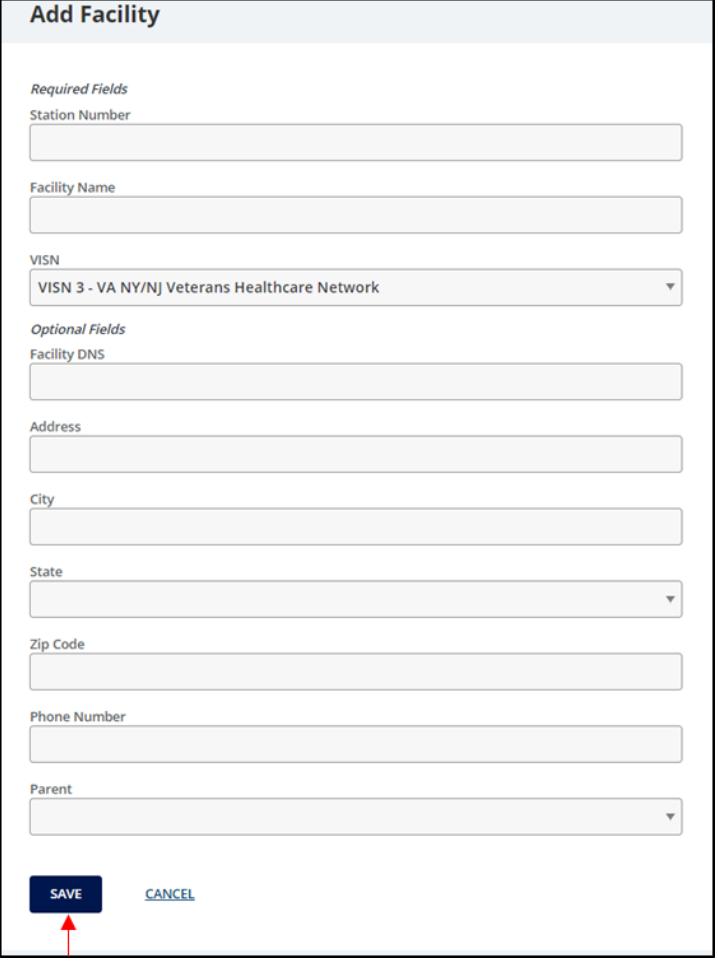
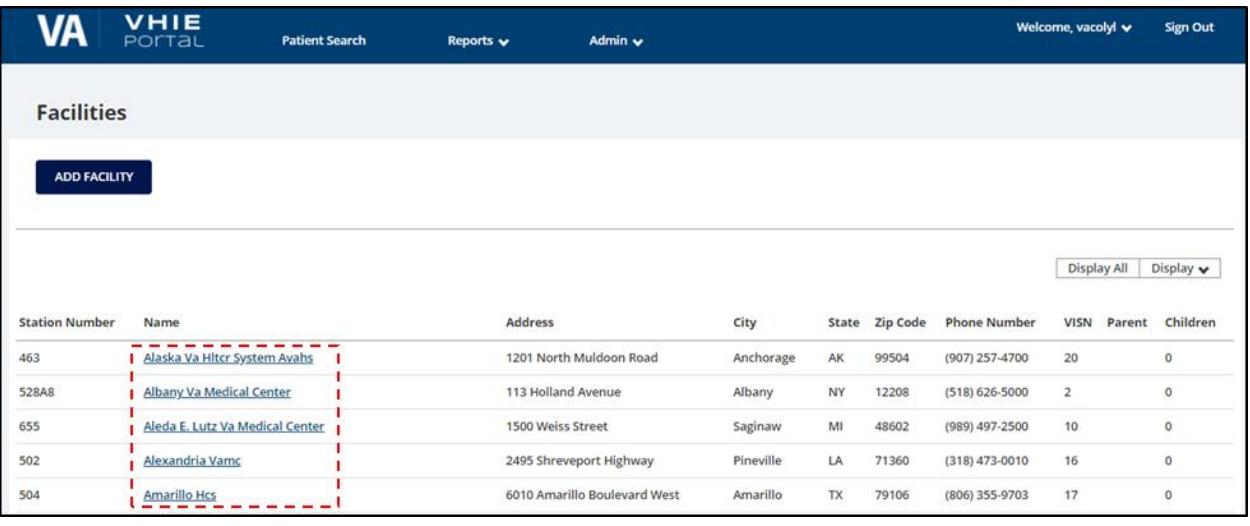
The VHIE admin user can access the list of VA Facilities to view, edit, delete, or add new facilities.

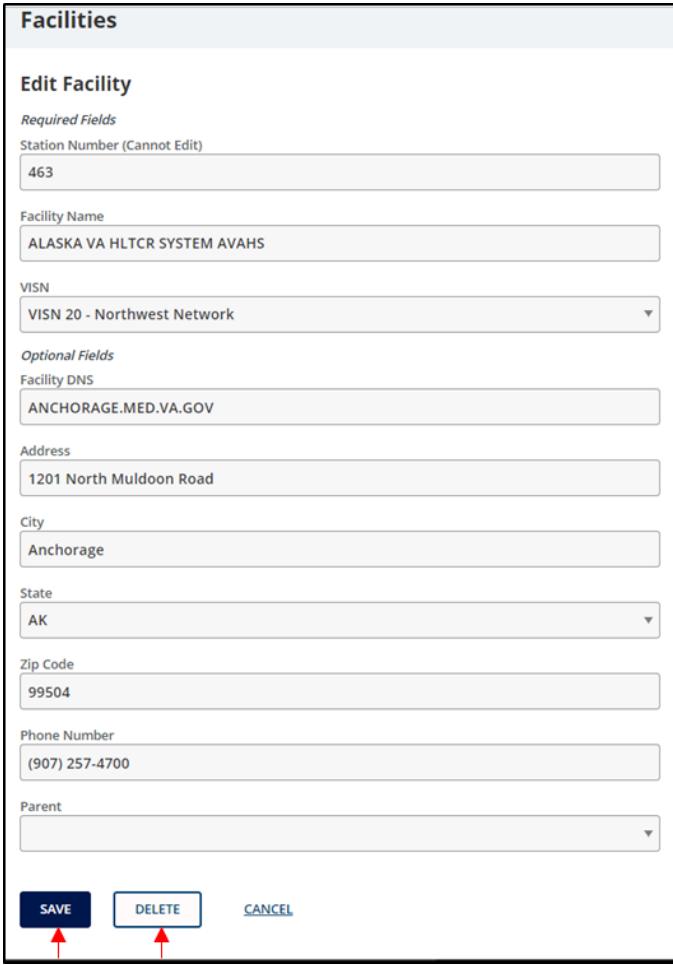
Prerequisite:

- The user has logged in via SSOi or another VA-approved method for authentication.
- The user is provided with elevated admin privileges to access and modify the list of VA Facilities.

Table 22: Access or Modify Facilities List

Step	Action																																																												
1.	<p>Select Facilities.</p> 																																																												
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Step	Action
5.	<p>Complete the appropriate required fields and click Save to edit the facility or click Delete to remove the facility from the list.</p> 

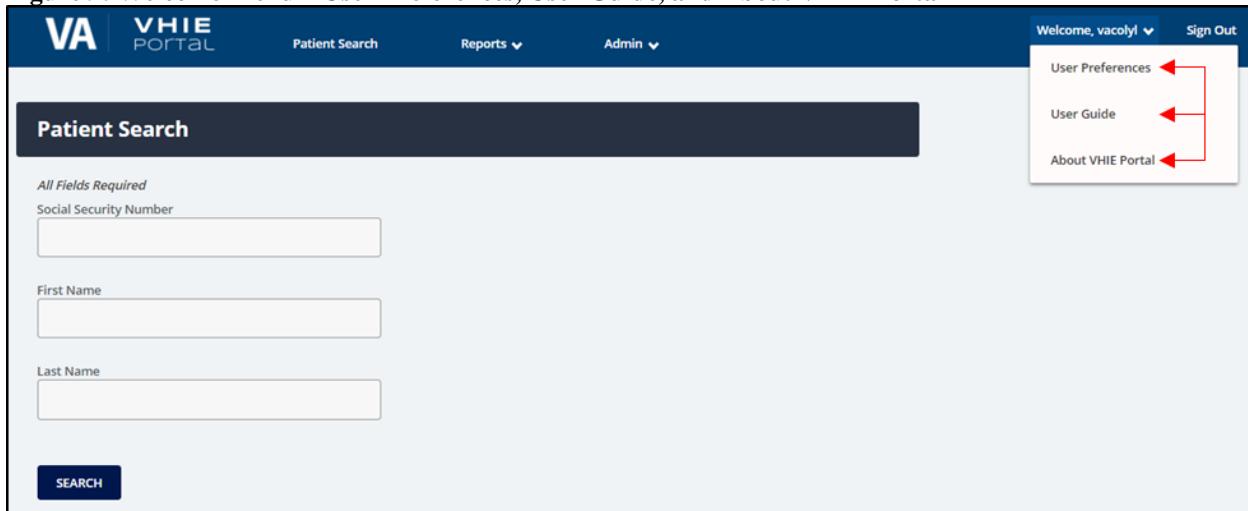
4.14. Welcome Menu – User Preferences, User Guide, and About VHIE Portal

From within the VHIE Portal, a VHIE user can click the displayed username at the top of the webpage to select the welcome menu items: User Preferences to set or update a default facility, access the Portal User Guide, or view information about the VHIE Portal software.

Prerequisite:

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

Figure 9: Welcome Menu – User Preferences, User Guide, and About VHIE Portal



4.14.1. Set or Update User’s Default Facility

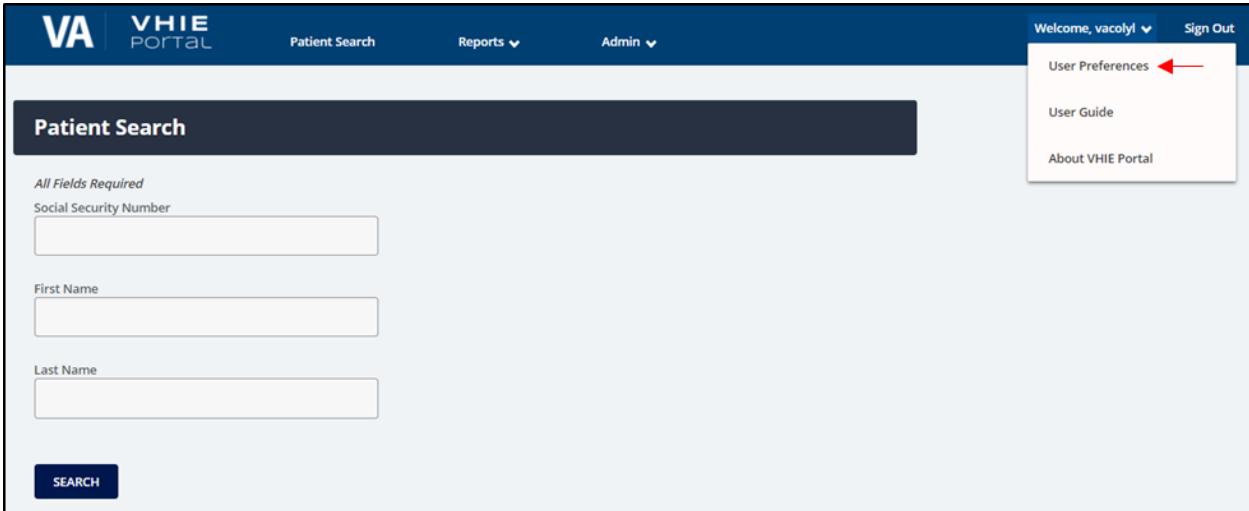
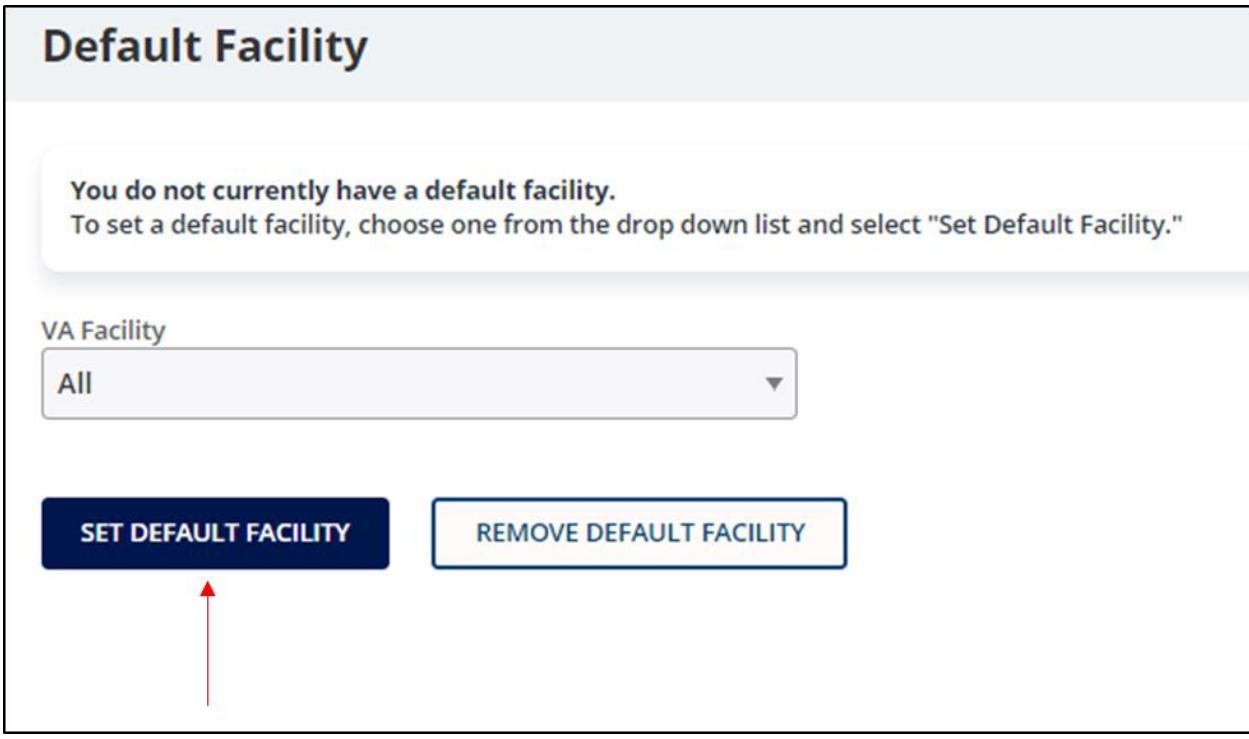
The VHIE user can set or remove their default facility from the notification message at the VHIE Landing Page or by selecting “User Preferences” from the welcome menu, under the username.

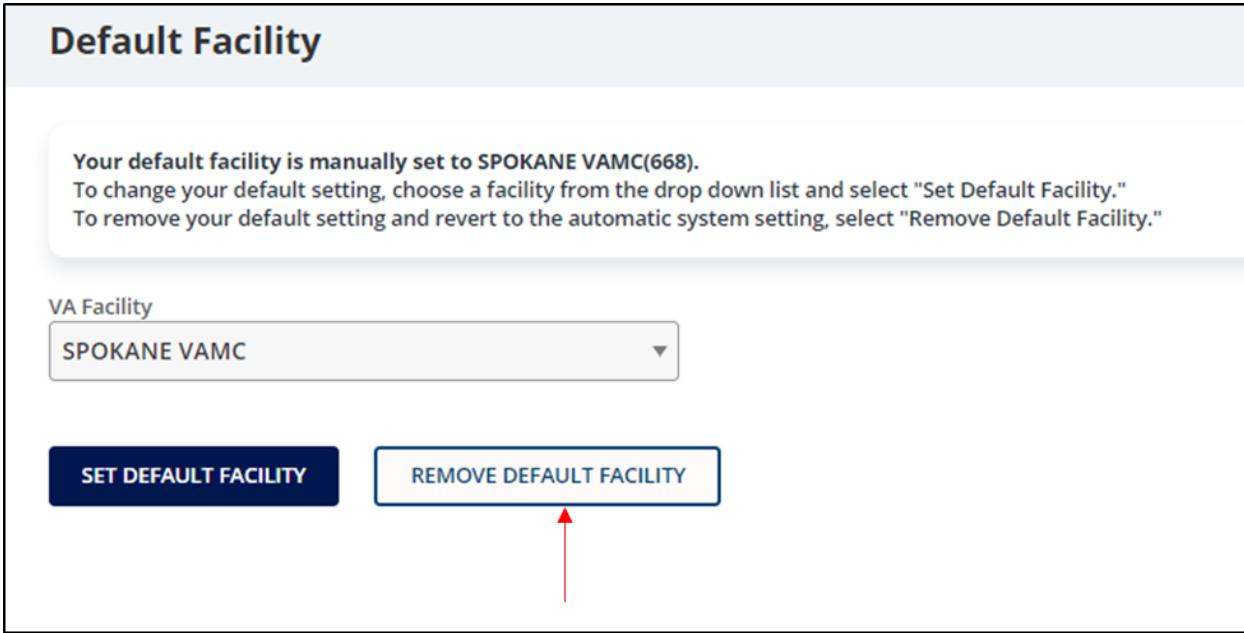
Prerequisite:

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

Table 23: Set or Update User's Default Facility

Step	Action
1.	<p>If the VHIE user has not set a default facility, a notification message will display at the Landing Page after login.</p> <p>Note: The notification message will continue to display at the Landing Page until the VHIE user has set a default facility.</p>  <p>The screenshot shows the VHIE Portal homepage. At the top right, there is a blue banner with white text that reads "You do not have a default facility set. Would you like to set one now?" with two buttons: "Yes" and "Not Now". A red arrow points from the text in step 1 to this banner. The main content area features a photograph of several military personnel in uniform holding flags, including the American flag and various state flags. The VHIE PORTAL logo is prominently displayed in the center. The bottom navigation bar includes links for VA, U.S. Department of Veterans Affairs, About VA, Accessibility, Disclaimer, Employee Resources, Find a Facility, and Intranet Privacy Policy.</p>

Step	Action
2.	<p>If the VHIE user moves on from the Landing Page without setting a default facility, the VHIE user can access the webpage to set a default facility by selecting “User Preference” from the Welcome Menu.</p> 
3.	<p>Select the VA Facility to set as the default facility, then click Set Default Facility.</p> 

Step	Action
4.	<p>After setting a default facility, the VHIE user can set a new default facility at any time or remove the current default facility by clicking Remove Default Facility.</p>  <p>Default Facility</p> <p>Your default facility is manually set to SPOKANE VAMC(668). To change your default setting, choose a facility from the drop down list and select "Set Default Facility." To remove your default setting and revert to the automatic system setting, select "Remove Default Facility."</p> <p>VA Facility</p> <p>SPOKANE VAMC</p> <p>SET DEFAULT FACILITY REMOVE DEFAULT FACILITY</p>

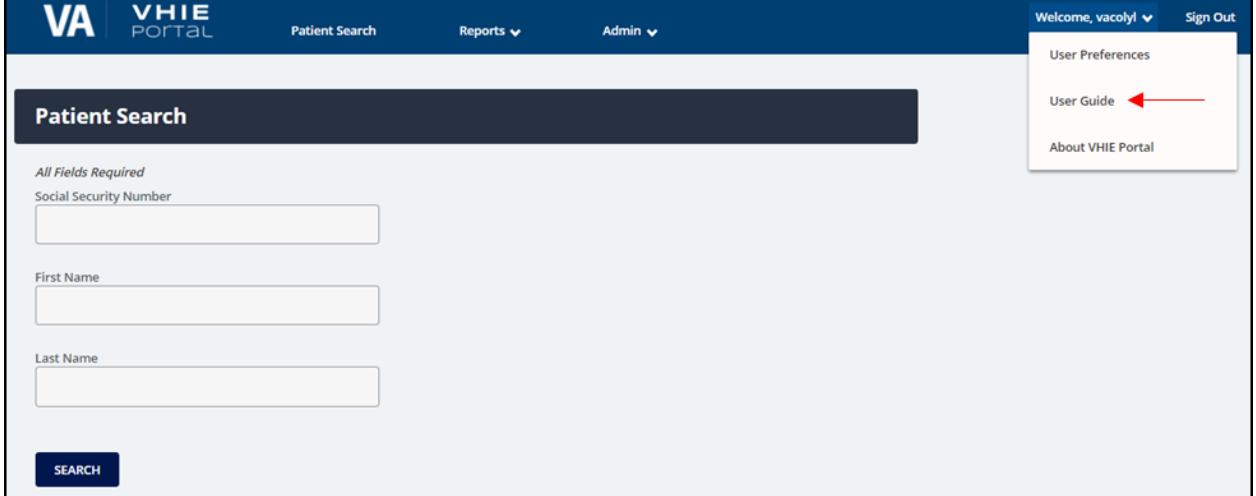
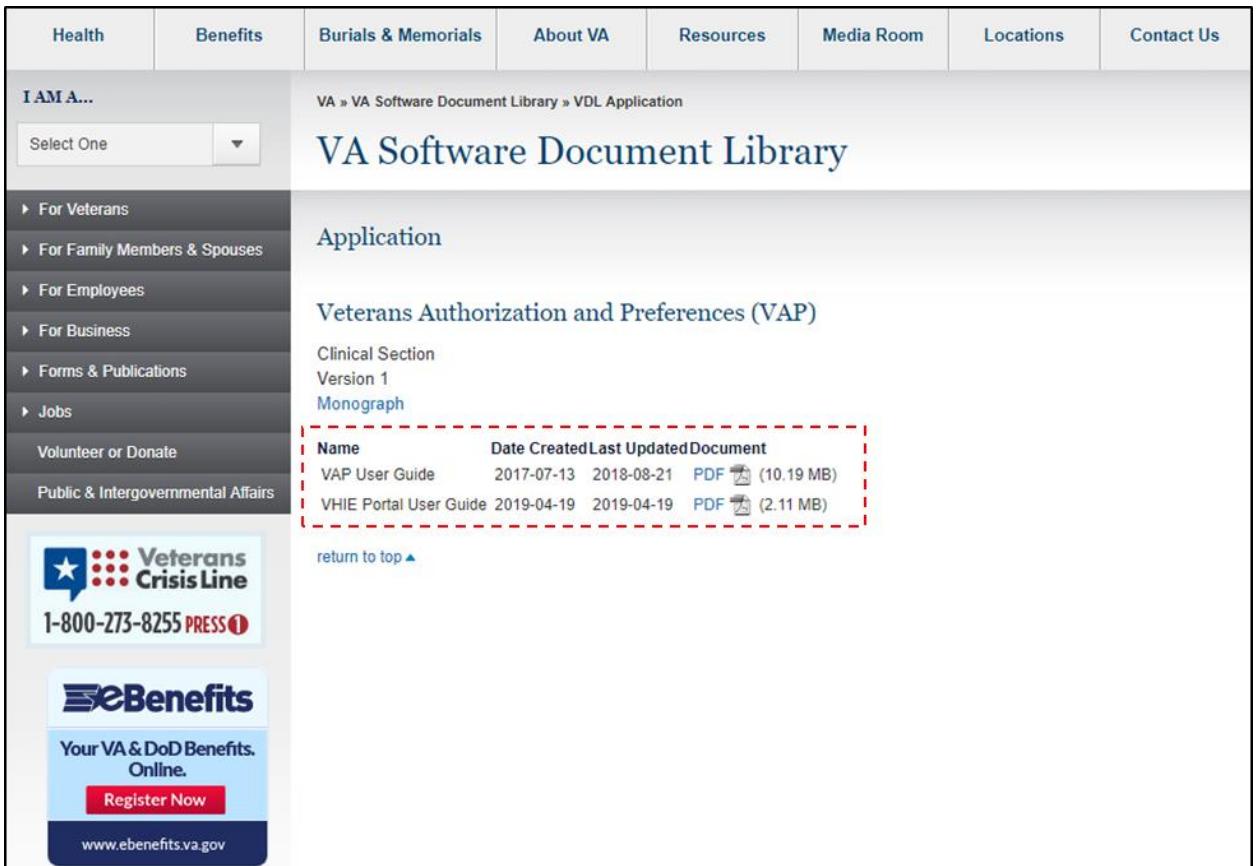
4.14.2. Access User Guide

The VHIE user can access the VHIE Portal User Guide by selecting “User Guide” from welcome menu, under the username.

Prerequisite:

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

Table 24: Access User Guide

Step	Action												
1.	<p>From the Welcome Menu, select User Guide.</p> 												
2.	<p>The VHIE user is automatically re-directed to the VA Software Document Library to download the PDF file of the applicable VHIE Portal User Guide.</p>  <table border="1" data-bbox="620 1393 1175 1488"> <thead> <tr> <th>Name</th> <th>Date Created</th> <th>Last Updated</th> <th>Document</th> </tr> </thead> <tbody> <tr> <td>VAP User Guide</td> <td>2017-07-13</td> <td>2018-08-21</td> <td>PDF (10.19 MB)</td> </tr> <tr> <td>VHIE Portal User Guide</td> <td>2019-04-19</td> <td>2019-04-19</td> <td>PDF (2.11 MB)</td> </tr> </tbody> </table>	Name	Date Created	Last Updated	Document	VAP User Guide	2017-07-13	2018-08-21	PDF (10.19 MB)	VHIE Portal User Guide	2019-04-19	2019-04-19	PDF (2.11 MB)
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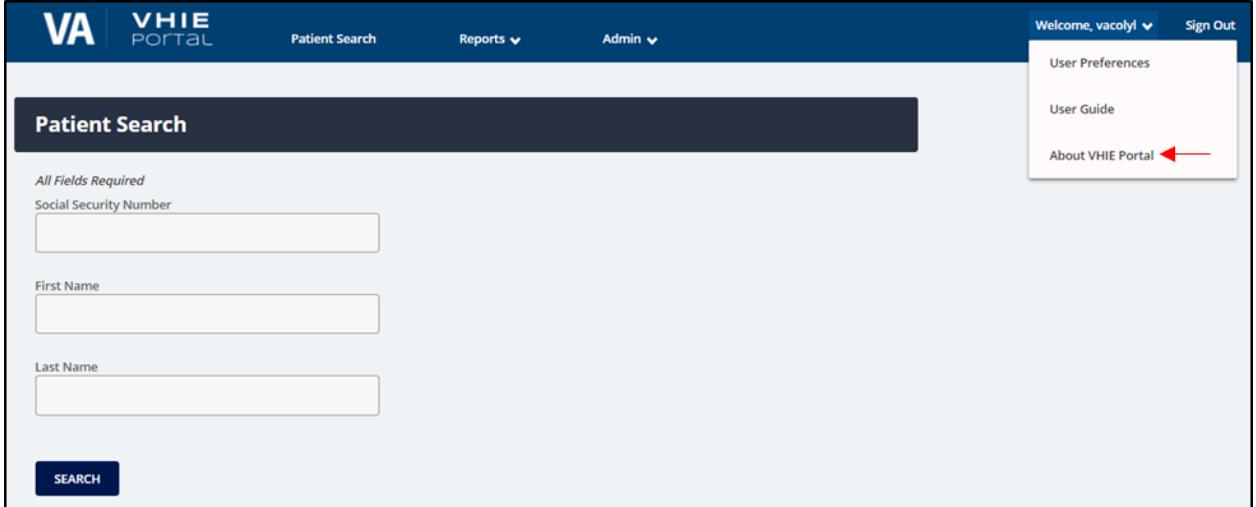
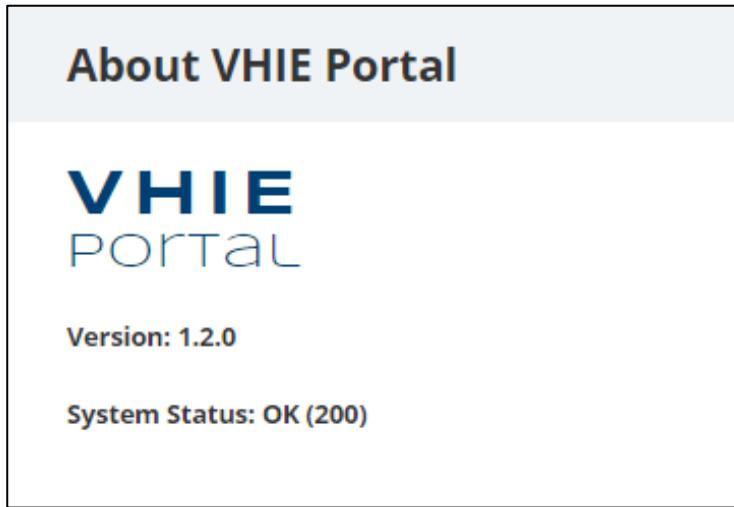
4.14.3. View System Software Information

The 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.

Table 25: View System Software Information

Step	Action
1.	<p>From the Welcome Menu, select About VHIE Portal.</p> 
2.	<p>The information will be displayed for the software version and the system status of the VHIE Portal.</p> 

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.
Export Disclosures Report to .CSV	Date column is not displaying the date in a standard Date and Time format when opening using Excel.	This is a result of Excel automatically converting the text file into a different into a default format.	<ol style="list-style-type: none">1) Right-click on the Date column.2) Select Format Cells.3) Under the Number tab, select Date as the Category.4) Select the format Type to display the Date and Time (e.g. 2/14/12 1:30 PM)
View Saved XML for Disclosures Reports	Saved XML displays error message on the browser.	If using Google Chrome as the browser, after opening the XML file, the file is opened using IE as the default application.	Resolution 1: Use IE as the browser when downloading XML. Resolution 2:

and CDA-type Health Documents		If using Google Chrome as the browser, the user must open the saved file using Google Chrome or another XML viewer application (e.g. MS Edge or Notepad).
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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