

# **Joint Legacy Viewer (JLV) 2.6.2**

## **User Guide**



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## Revision History

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## Artifact Rationale

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

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# 1. Introduction

Born from a joint Department of Defense (DoD)-Department of Veterans Affairs (VA) venture called JANUS, Joint Legacy Viewer (JLV) was directed by the Secretary of the VA and the Secretary of Defense in early 2013 to further support interoperability between the two departments. JLV is a centrally hosted, Java-based web application managed as a single code baseline, and deployed in separate DoD and VA environments. Its browser-based, graphical user interface (GUI) provides an integrated, read-only view of Electronic Health Record (EHR) data from the VA, DoD, and Veterans Health Information Exchange (VHIE) community partners, within a single application.

JLV eliminates the need for VA and DoD clinicians to access disparate viewers. The GUI retrieves clinical data from a number of native data sources and systems, then presents it to the user via widgets, each corresponding to a clinical data domain.

Users can create and personalize tabs, drag and drop widgets onto tabs, sort data within a widget's columns, set date filters, and expand a widget for a detailed view of patient information. Within each widget, a circular, blue icon indicates the data retrieved is from a VA source; a square, orange icon indicates that the data retrieved is from a DoD source; and a hexagonal, purple icon indicates data that the data retrieved is from VA VHIE partners.

This document is intended for VA JLV users supporting the:

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

[Table 1](#) describes authorized JLV users and their responsibilities.

**Table 1: JLV User Profiles**

User	Description and Responsibilities
DoD Clinician	DoD clinicians who access patient EHRs
VHA	VA clinicians and administrative staff who access patient EHRs to assist in providing health care services
VBA	VA administrative staff who access patient EHRs to assist in Veterans benefits administration processes

## 1.1. Purpose of the Guide

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

The major features of the JLV GUI include:

- Access to patient data (through widgets)
- Patient context management
- User-restricted access (Break the Glass)
- Use of the Report Builder
- Option to use the accessible (508 compliant) interface

### **1.1.1. Guide Conventions**

This document is designed for both online and hardcopy consumption.

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

### **1.1.2. Terminology**

The following standard terms are used throughout this guide:

- **Patient Portal:** The page that displays patient data through widgets
- **Provider Portal:** The landing page, or default view, of JLV that appears after logging in to the application that displays widgets and the tools that enable quick access to basic features
- **Tabs:** Tabs display the Patient and Provider portals, and present user-customized views of widgets
- **Widget:** A component of the JLV interface that enables a user to view information or perform a function
- **Widget Tray:** An expandable and collapsible tray at the bottom of the portal pages that provides access to all widgets available for placement on the portal pages

## **1.2. Assumptions**

The User Guide is written from the perspective of VA JLV users, assuming the following:

- You can open, navigate, and use a web browser
- You can use web-based applications, their menu options, and navigation tools
- You have the Uniform Resource Locator (URL) for the JLV Login page, a system username, and the Access/Verify codes required to launch JLV
- You are using the functionality of JLV to support VHA and/or VBA workflows

## **1.3. System Requirements**

JLV is optimized for use with the VA standard browser, Internet Explorer (IE) version 11. To ensure proper viewing of patient data and other application elements, it is recommended that JLV is viewed using:

- A monitor set to a minimum screen resolution of 1024 x 768
- The approved browser, with the browser's zoom percentage set to 100

JLV must be accessed through IE versions 9 and above. Other web browsers may function, but are not certified for support. It is also recommended that Adobe Reader be installed on the user's system.

## **1.4. Getting Help**

For how to information within JLV, please see online help. For access to JLV training videos and additional JLV training materials, please visit [JLV Resources](#).

Prior to contacting the Enterprise Service Desk (ESD) for support ([Table 2](#)), please refer to [Section 2, Logging in to JLV](#), for detailed information about how to access JLV, and to [Section 6, Troubleshooting](#), for suggested resolution steps and troubleshooting information.

If you are an authorized user, are having trouble logging in to JLV, or are experiencing other application issues, please contact the ESD via telephone or by using the YourIT self-service portal for assistance.

**NOTE:** Unregistered users should contact support to request access to JLV.

**Table 2: ESD Contact Information**



**IT Enterprise Service Desk**

Phone: 855-673-4357

YourIT Self-Service Portal: <https://yourIT.va.gov>

## 2. Logging in to JLV

Authorized, registered users within the VA and DoD are provided access information to log in to JLV. VHA users who have access to the Computerized Patient Record System (CPRS) are automatically authorized to use JLV. VBA users must contact the ESD for access.

Refer to [Section 6, Troubleshooting](#), for more tips on logging in to JLV.



Users who are not authorized to access JLV will see an *Access denied* message. If you believe you received the message in error, please contact the ESD.

The **JLV Login** page displays the last successful and unsuccessful log in attempts in the lower left corner, along with the date, local time, and the Internet Protocol (IP) address from which access was made, or attempted access failed.

**PLEASE NOTE:** There is no functionality available for changing a user identification (ID) and password in JLV. For information about login errors, Access code errors, or Verify code errors, see [Section 6, Troubleshooting](#).

### 2.1. VHA User Log In

The log in steps detailed below apply to VHA users accessing JLV through a URL.

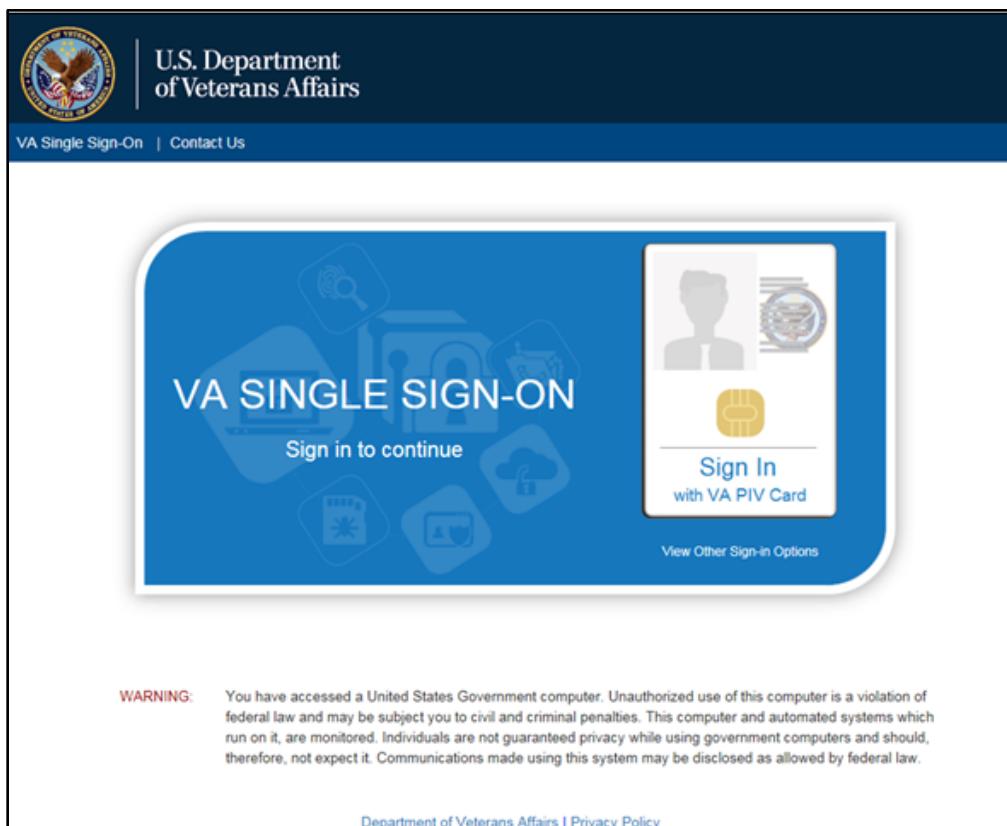
To log in to JLV:

1. Enter VHA's URL for JLV into the address bar of your Internet browser (<https://jlv.med.va.gov/JLV>)
2. Once SSOi is enabled, all VA users will be redirected to the **VA Single Sign-On** page ([Figure 1](#))
  - a. VA users must sign in to, and be authenticated by, the Single Sign-On system in order to access JLV



Once SSOi is enabled, users with a Personal Identity Verification (PIV) exemption may select any of the alternate authentication options available through the VA Single Sign-On Login page for access to JLV. PIV exemptions, if required, can be obtained from the ESD.

**Figure 1: Single Sign-On Page for VA Users**



3. Once authenticated by the Single Sign-On system, you are redirected to JLV
4. Read the important user consent information regarding access to a Government information system, and click **I Accept**

Optional Step:

Users of Assistive Technology can check the **Accessibility Mode** option in the top-right corner, above the JLV Login page fields

If selected, JLV opens and displays the application in the 508-compliant Accessible User Interface (UI) theme (See [Section 3.2.2, Using the Accessible Theme's Functionality](#), for detailed information)

5. Enter your VA login credentials:
  - a. Enter your CPRS Veterans Health Information Systems and Technology Architecture (VistA) Access Code
  - b. Enter your CPRS (VistA) Verify Code
  - c. Select VA from the Agency field
  - d. Select your VA Medical Center or regional Health Care System from the Site field
6. Click **Login**

## 2.2. VBA User Log In

The following instructions apply to VBA users accessing JLV.

To log in to JLV:

1. Enter the VBA's URL for JLV into the address bar of your Internet browser ([https://jlv.med.va.gov/JLV\\_Claims](https://jlv.med.va.gov/JLV_Claims))
2. All VA users will be redirected to the **VA Single Sign-On** page ([Figure 1](#))
  - a. VA users must sign in to, and be authenticated by, the Single Sign-On system in order to access JLV

**i** Users may select any of the authentication options available through the VA Single Sign-On Login page for access to JLV.
3. Once authenticated by the Single Sign-On system, you are redirected to JLV
4. Read the important user consent information regarding access to a Government information system, and click **I Accept**
5. If desired, check the **Accessibility Mode** option in the top-right corner, above the JLV **Login** page fields
  - a. If selected, JLV opens and displays the application in the 508-compliant Accessible UI theme (See [Section 3.2.2, Using the Accessible Theme's Functionality](#), for detailed information)
6. Enter your login credentials:
  - a. Enter your Compensation and Pension Record Interchange (CAPRI) Access Code
  - b. Enter your CAPRI Verify Code
  - c. Select VA from the **Agency** field
  - d. Select Veterans Benefits Admin from the **Site** dropdown list
7. Click **Login**

**i** Users with any CAPRI patient selection restrictions will *not* be able to log in JLV.

## 2.3. Editing Your User Profile at Log In

One method of setting application configuration options (customizing) is by using the **Edit Profile** link (highlighted in [Figure 2](#)) to access the user profile fields through the JLV **Login** page.

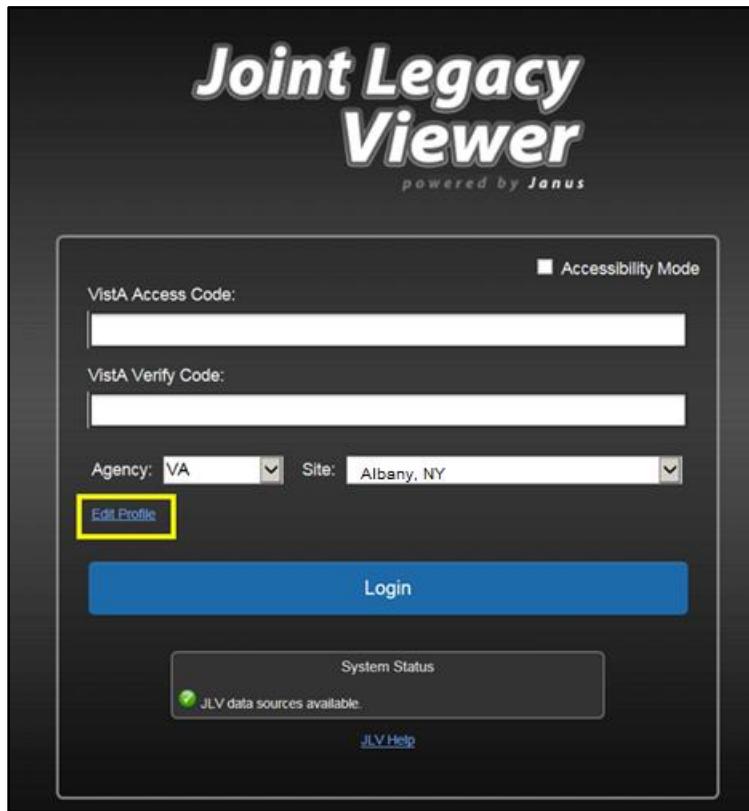
The subsections below discuss the options to set the UI theme, and to enable/disable the **Include Community Data** function via the **Edit Profile** link.

User profile options can also be set within JLV. See [Section 3.2, Customizing JLV](#).



The selected options are saved to the user profile by clicking **Save and Login** and remain set for all subsequent JLV sessions until changed by the user.

**Figure 2: Edit Profile Link on the JLV Login Page**



### 2.3.1. Selecting a UI Theme

Selecting a UI theme sets the font color and foreground/background colors of the JLV GUI for the widgets, toolbars, and dialog boxes. Theme color options are Blue (Default), Green, Dark Gray, Gray, and Accessible (508 compliant). The UI theme choices appear below the **Agency** and **Site** fields, as seen in [Figure 3](#).



The **Accessible** theme provides larger fonts, enhanced tab and keystroke functionality, and screen reader compatibility, compliant with Federal accessibility requirements and Section 508 standards. Refer to [Section 3.2.2, Using the Accessible Theme's Functionality](#), for more information.

### 2.3.2. Community Data Display

Checking (enabling) the **Include Community Data** option will tell JLV to query for, receive, and integrate patient data from external VA VHIE community partner data sources. The community data setting is in the bottom half of the **Edit Profile** dialog, seen in [Figure 3](#).

Regardless of this setting, VHIE community data is available in the **Community Health Summaries and Documents - VA** widget. See [Section 5.3, Community Health Summaries and Documents - VA](#), for detailed information.



VBA users do not have access to community data and will not see the **Include Community Data** option.

**Figure 3: Community Data Display Option**

The screenshot shows a configuration dialog box with the following fields:

- VistA Access Code:** A text input field containing "\*\*\*\*\*".
- VistA Verify Code:** A text input field containing "\*\*\*\*\*".
- Agency:** A dropdown menu set to "VA".
- Site:** A dropdown menu set to "IPOTEST4".
- User Interface Theme:** A radio button group with "Blue (Default)" selected, and other options "Green", "Dark Gray", "Gray", and "Accessible" available.
- Community Data Display:** A large empty text area.
- Buttons:** "Save and Login" (blue button) and "Cancel".
- Help:** A link labeled "JLV Help" at the bottom.

## 2.4. Logging Out of the Current JLV Session

To end the current session and exit JLV, click the **Log Out** icon  (highlighted in [Figure 4](#)) at any time.

**Figure 4: JLV Log Out Icon**



A JLV session will end automatically after 30 minutes of inactivity. You will receive a warning that the session will be ended after 25 minutes of inactivity. Automatic termination of a session logs you out of the application and displays the **Logout** page. To initiate a new JLV session, close and reopen the browser and return to the JLV **Login** page.

Actions in JLV that are considered activity are changing patients, refreshing widgets, opening or closing widgets, adding or removing widgets from the portal pages, and adjusting date ranges.

### 3. The Elements and Functionality of JLV

#### 3.1. The JLV Portal Pages

After a successful log in, your username is shown in the upper right corner of the application, and the JLV portal pages are displayed. The JLV portal pages are:

- The Patient Portal 
- The Provider Portal 

##### 3.1.1. Default View

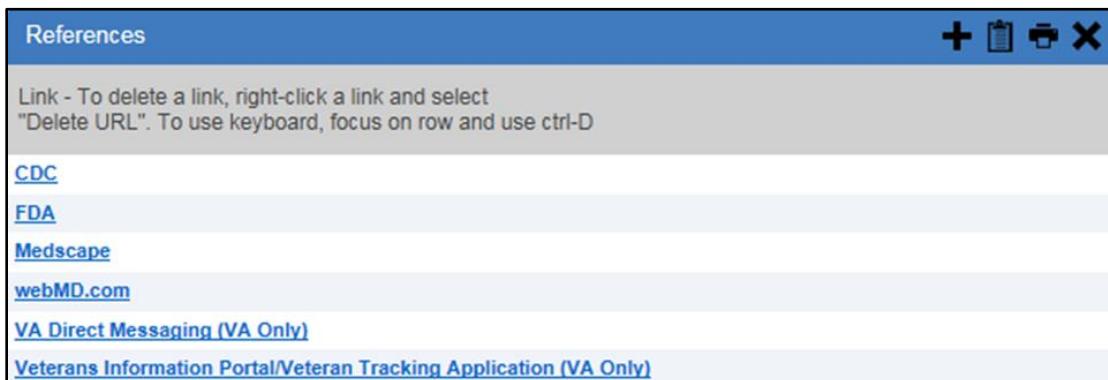
Upon log in, users will see the **Provider Portal** . The portal displays the **Patient Search** dialog box and the **References** widget by default.

 CPRS users who select a patient within CPRS, then launch JLV are taken directly to the **JLV Patient Portal** , where the records for the patient selected in CPRS are displayed.

The **References** widget ([Figure 5](#)) is shown by default on the **Provider Portal** . The **References** widget displays hyperlinked references to online resources. Click a reference link to access the associated website. Click the **Add** icon + to add a new reference link.

Only the reference links you add can be deleted. To delete a reference link, right-click the link and select **Delete URL**. Users will not be able to delete reference links included in the default widget configuration.

**Figure 5: References Widget**



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

New JLV users will see a preconfigured, default widget layout on the **Patient Portal**  when a patient is selected. The default layout includes the **Allergies**, **Problem List**, **Documents**, **Outpatient Medications**, and **Lab Results** widgets.



Users can configure the layout of widgets on the **Patient Portal** and create multiple widget tabs, as described in [Section 3.2, Customizing JLV after Log In](#), and in [Section 4.1, Accessing and Opening Widgets](#). Customizations are saved to the user profile and remain until manually changed.

### 3.1.2. System Menu

Each portal page has a toolbar (highlighted in [Figure 6](#)) that enables quick access to the following features:

- **Configuration Options:** Click the **Settings** icon  in the top-right corner of either portal page to set user preferences, including the UI theme (Refer to [Section 3.2, Customizing JLV](#))
- **Report Builder:** Click the **Report Builder** icon  in the top-right corner of either portal page to create custom reports (Refer to [Section 4.8, Using Report Builder](#))
- **Access Online Help:** Click the **Help** icon  in the top-right corner of either portal page to open online help
- **Log Out of JLV:** Click the **Log Out** icon  to log out and close the current JLV session (Refer to [Section 2.4, Logging Out of the Current JLV Session](#))

**Figure 6: JLV Tools on the Portal Pages**



The following functions can be completed from the portal pages (highlighted in [Figure 7](#)):

- Perform a Patient Search 
- Switch between the Patient Portal  and the Provider Portal 
- View the system status 
- View Context Management status  
- Open the widget tray [Open Widget Tray](#) ^ (bottom-right corner of the portal pages)

**Figure 7: More JLV Functionality**



### 3.1.3. Viewing System Status

The system status reports the condition of the JLV application as a whole. If there is a system status alert, the warning icon  is displayed to the left of your username. Hovering over **System Status** provides additional information.

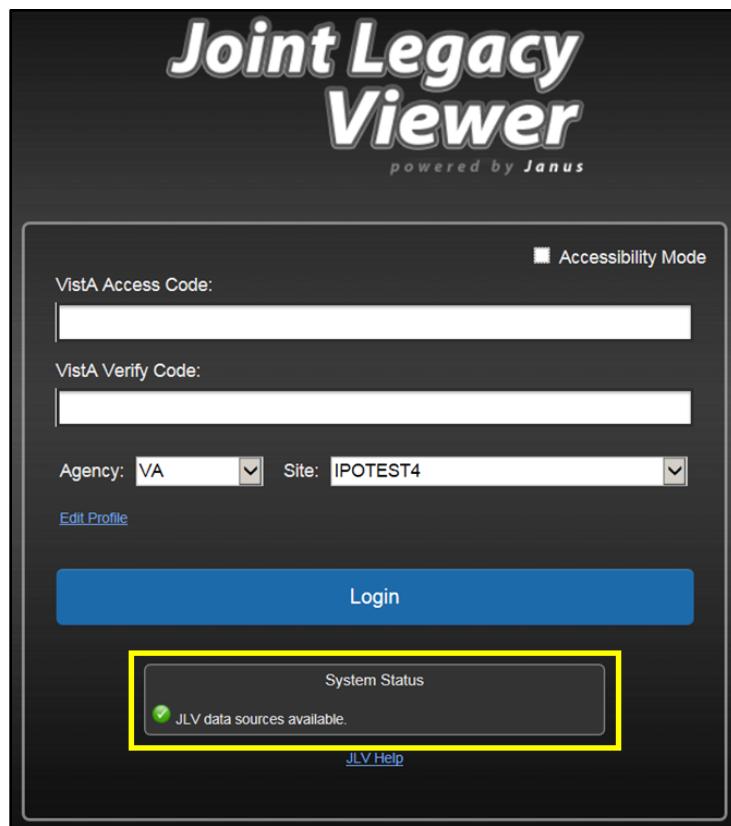


**NOTE:** The System Status reports the overall condition of the JLV application, while the Connection Status reports the condition of the connection between JLV and its external resources. See [Section 4.5, Viewing Connection Status](#), for more information.

JLV displays the system status on the **Login** page, below the user credential fields (highlighted in [Figure 8](#)), and at the top of the Portal Pages ([Figure 7](#)).

- When all monitored systems and services are online and connected, a green icon  appears next to the status message *JLV data sources are available* on the JLV **Login** page
- When one or more of the monitored systems or services is offline or unavailable, a yellow warning icon  appears next to the status message *JLV is having problems*
  - Notification of unavailable systems persisting longer than 10 minutes should be reported to the VA Enterprise Service Desk ([Section 1.4, Getting Help](#))
- When the jMeadows Data Service is unavailable, a red icon  appears next to the message, *JLV is having problems, jMeadows Data Service is unavailable, JLV may not function properly*
  - Users may not be able to log in to JLV, or view patient data, until the jMeadows connection is restored.

**Figure 8: System Status on the JLV Login Page**



### 3.1.4. Patient Context Management

Clinical Context Management (CCOW) is a way for applications to synchronize the display of clinical context, based on the Health Level 7 (HL7) CCOW standard. If CCOW-compliant applications are sharing context and one of the applications changes the data display to a different patient, the other applications will switch to display that same patient.

JLV is context management-enabled. When context is enabled, a patient change made in one context-enabled application (i.e., CPRS) will trigger the same change in JLV. The same effect is shown vice versa; that is, when a patient is selected in JLV, it triggers a patient change in other context-enabled applications.

Context management is enabled by default, and JLV will attempt to connect to the context vault upon a valid login. The context status appears in the top-right corner of the portal pages. When context is established, the **Context On** icon is shown. When context is suspended, the **Context Suspended** icon is shown.

[Figure 9](#) shows the context indicator location on a JLV portal pages. In this example, context is suspended.

**Figure 9: Context Indicator**



### 3.1.4.1. Suspending Context

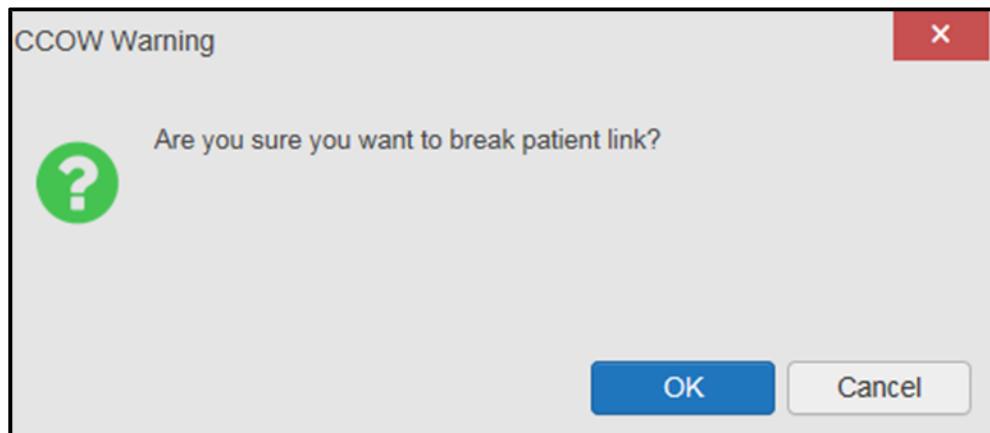
Context can be manually suspended.

To manually suspend context:

1. Click the **Context On** icon 
2. The CCOW warning message, *Are you sure you want to break patient link?* appears ([Figure 10](#))
3. Click **Yes** to continue

Once context is suspended, the **Context Suspended** icon  is displayed on the portal pages. When context is suspended, patient changes will not be reflected in either JLV or other CCOW-enabled applications.

**Figure 10: Suspending Context**



### 3.1.4.2. Establishing Context

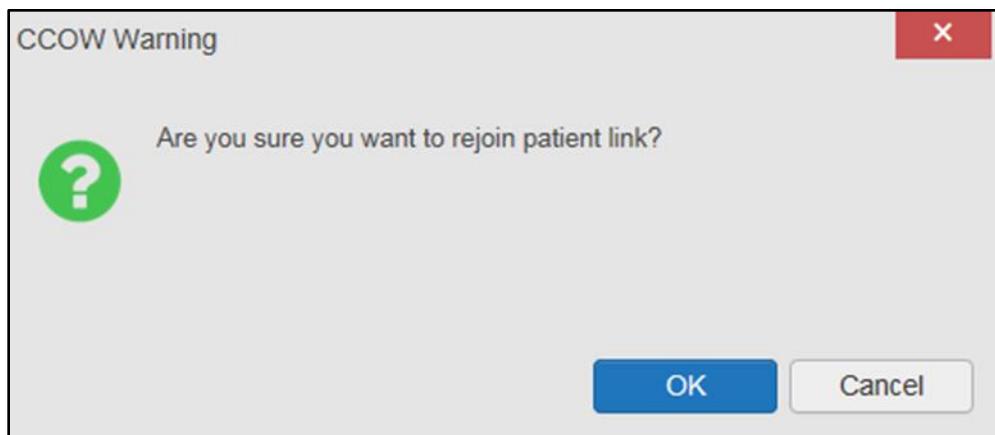
When context is suspended, it can be reestablished manually.

To establish or reestablish context:

1. Click the **Context Suspended** icon 
2. The CCOW warning message, *Are you sure you want to rejoin patient link?* appears ([Figure 11](#))
3. Click **Yes**

Once context is established, the **Context On** icon  is displayed on the portal pages.

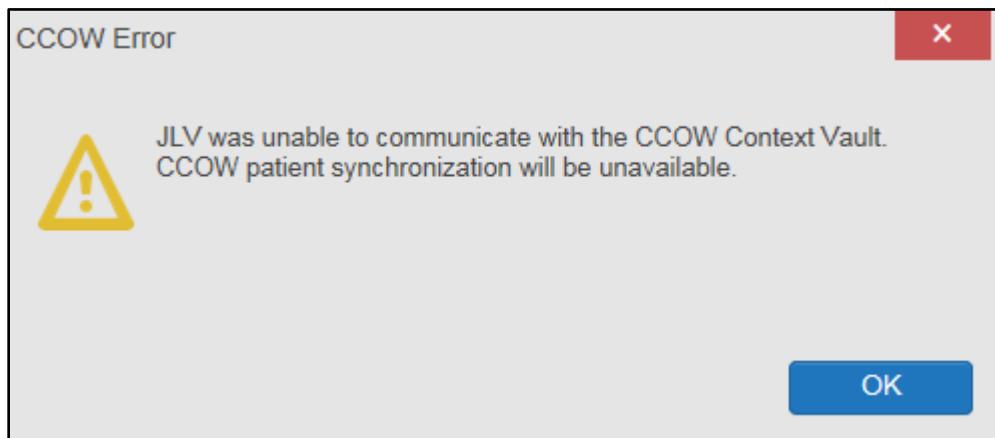
**Figure 11: CCOW Warning Message**



### 3.1.4.3. Unable to Communicate with Vault

If JLV is unable to initiate context management upon log in, the user will see the CCOW Error message ([Figure 12](#)). Click **OK** to continue. The **Context Suspended** icon  is displayed on the portal pages. If the CCOW error persists, contact your local service desk for assistance.

**Figure 12: CCOW Error Message**

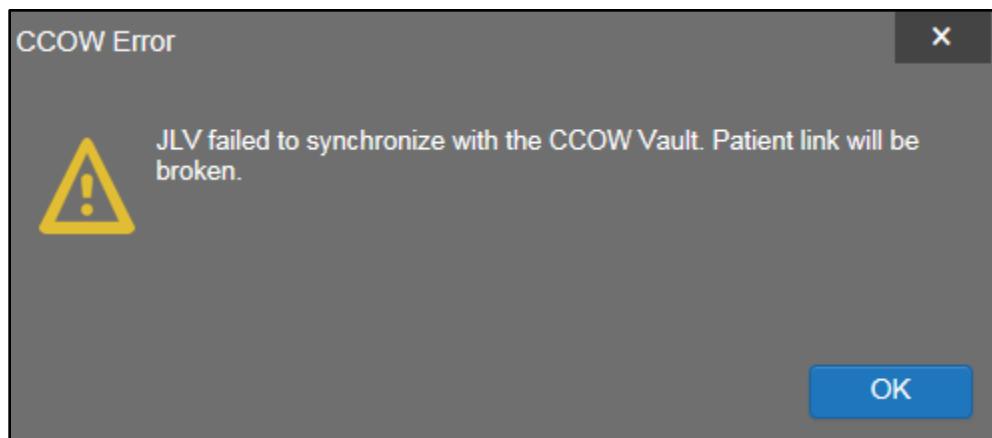


### 3.1.4.4. Context Synchronization Failure

In the event that JLV is unable to reestablish context, a CCOW Error message is presented ([Figure 13](#)). This indicates context is suspended. Click **OK** to continue. The **Context Suspended**  icon is displayed on the portal pages.

VBA users will encounter the error message ([Figure 13](#)) at each log in, as there are no CCOW system components installed on their computers.

**Figure 13: Context Synchronization Failure**



## 3.2. Customizing JLV

Configuration options can be set within JLV by clicking the **Settings** icon.

### 3.2.1. Setting the UI Theme

The UI theme setting is a part of the user profile. Choosing a UI theme sets the font, foreground, and background colors of the widgets, toolbars, and dialog boxes. Once selected, the UI theme is stored in the user profile, and remains set until changed. The available UI themes are Blue (Default), Green, Dark Gray, Gray, and Accessible (508 compliant).

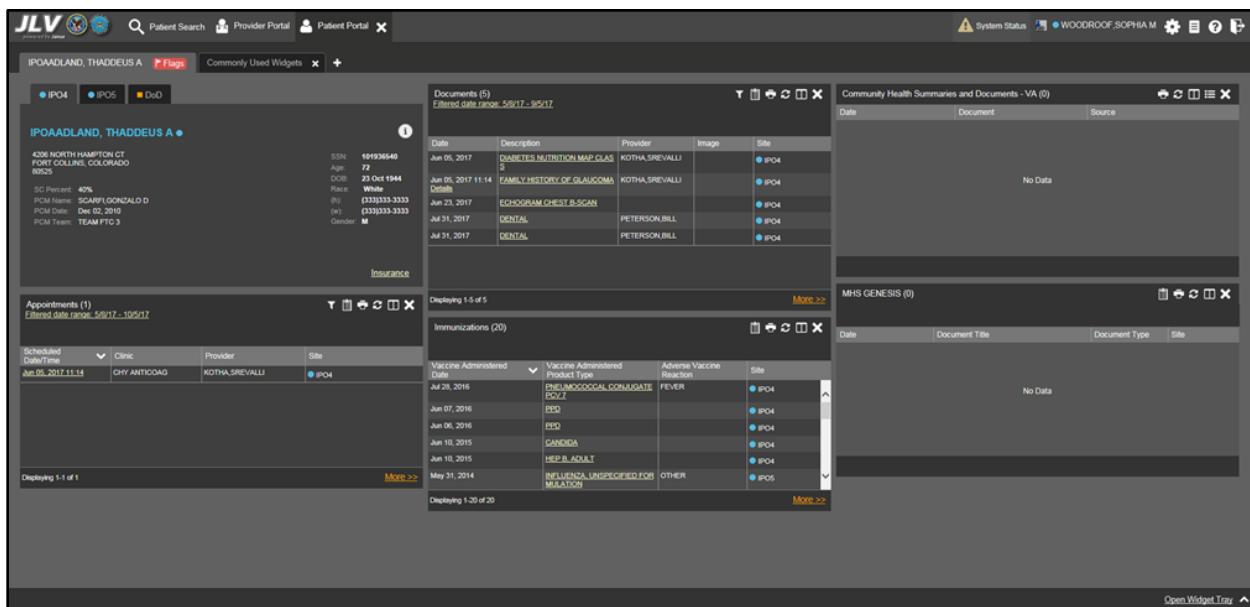
To set the UI theme within JLV:

1. Click the **Settings** icon in the upper right corner of the portal pages ([Figure 6](#))
2. The **User Configuration** dialog box opens
3. Select the desired theme and click **Save**
4. Alternatively, click **Cancel** to exit the dialog box and restore the previous theme

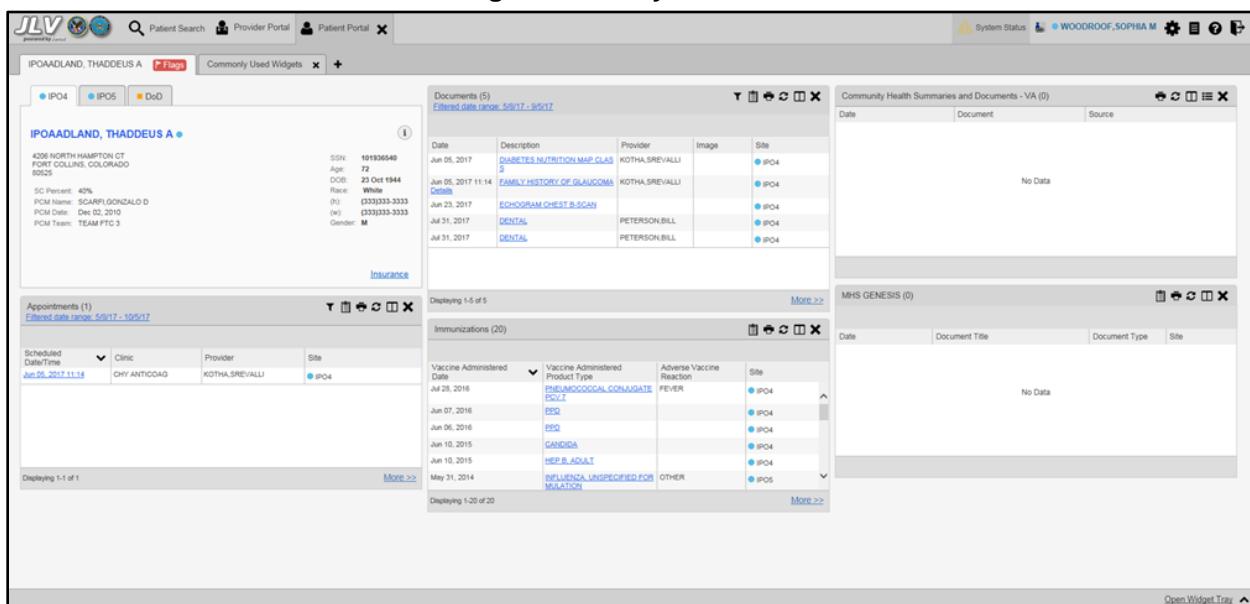
**Figure 14: Blue (Default) UI Theme**

**Figure 15: Green UI Theme**

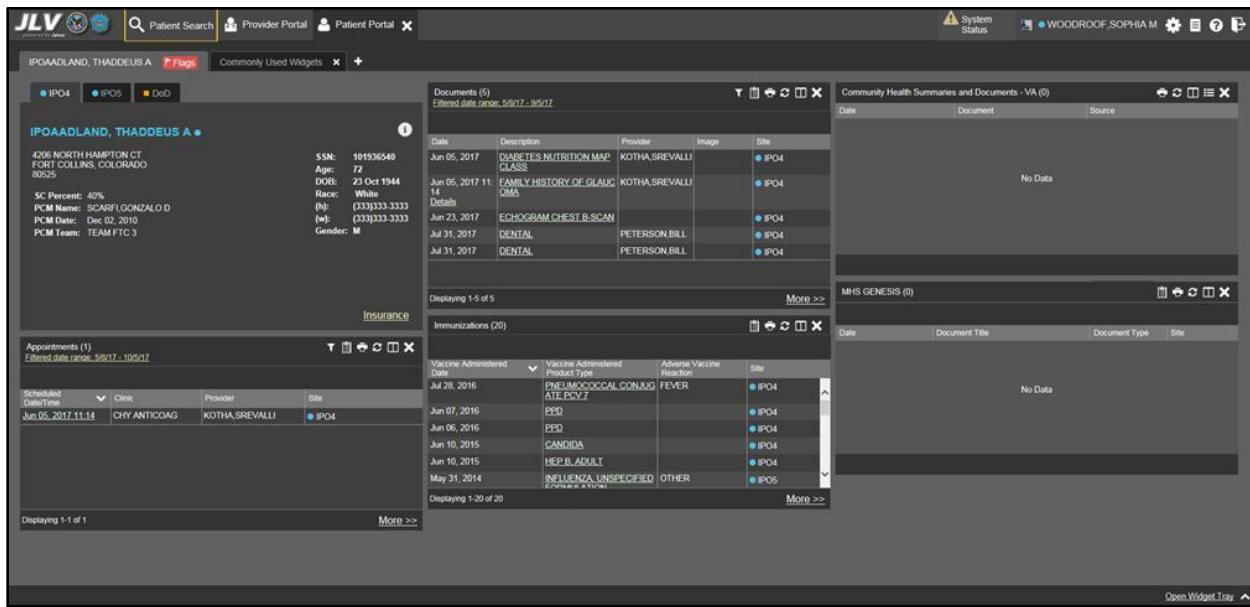
**Figure 16: Dark Gray UI Theme**



**Figure 17: Gray UI Theme**



**Figure 18: Accessible (508 Compliant) UI Theme**



### 3.2.2. Using the Accessible Theme's Functionality

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



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

#### 3.2.2.1. Keyboard Focus and Screen Navigation

Keyboard focus is the highlighting of a screen element, field, or control that enables interaction with, and navigation of, JLV through the use of the keyboard and keystrokes. The item in focus is outlined in gold as a visual indicator of the element, field, or control with keyboard focus that will receive information typed on the keyboard.

JLV uses common Windows keystrokes (Tab, Shift + Tab, arrow keys, Enter), and keyboard shortcuts to move the focus to all menus, and activate all functions on the menus. All user interface items are accessible via the keyboard under the **Accessible** theme.

Pressing **Enter** or the **Spacebar** when an element that provides action is in keyboard focus performs the associated action. For example, pressing **Enter** or the **Spacebar** when the **Settings** icon is in focus opens the **User Configuration** dialog box. Using the arrow keys or the **Tab** key moves between keyboard focus items to navigate through screen elements. A complete list of accessible keystrokes is provided in [Table 3](#).

**Table 3: Accessible Theme Keyboard Shortcuts**

Keystroke	Description
<b>Application &amp; Portal Navigation</b>	
ALT + 4	Press to transfer keyboard focus to the main or top screen element 1) On a portal page, focus is transferred Patient Search or the patient tab in the <b>Demographics</b> widget 2) In a widget, focus is transferred to the <b>More&gt;&gt;</b> link 3) In a dialog box, focus is transferred to the dialog box's <b>Close</b> button
ENTER	Press to initiate the action associated with the item in focus
TAB	Press to transfer keyboard focus to other user interface items
ESC	Press to return keyboard focus to the panel containing the user interface item with keyboard focus, or to exit a window, widget, or tab
SPACEBAR	Press to activate any user interface item (for example, click a button)
Arrow Keys	When focused on a widget, press the arrow keys to change page viewing in a widget's data table When focused on a dropdown list, press the down arrow key to view list contents
Ctrl + r	When working with Report Builder, place keyboard focus on a record in a widget and press Ctrl + r to add the record to the Report Builder pane
<b>Tab Panels</b>	
Arrow Keys	Use the left and right arrow keys to change tab panels To add a tab panel, press the right arrow key until the last tab (labeled with a plus sign) is selected. A dialog box prompts for the new tab name To close a tab, focus on the tab panel and press Esc
<b>Windows or Dialog Boxes</b>	
TAB	Press to transfer keyboard focus to other user interface items within the window or dialog box
<b>Adding Widgets to a Portal Page</b>	
Number position	To add a widget from the widget tray using keystrokes: 1) Determine which column (1, 2, or 3) in which to place the widget 2) Focus on the desired widget icon in the widget tray and press the 1, 2, or 3 key, depending on the column chosen

### 3.2.2.2. Accessible Theme Screen Navigation

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

[Figure 19](#) depicts the **Documents** widget with keyboard focus. Focus can be changed by pressing the **Tab** key. In this example, pressing the **Tab** key shifts the keyboard focus from the **Documents** widget to the widget immediately below the **Documents** widget. Pressing the **Tab** key again shifts the keyboard focus to the widget at the top of the next column.



To view hover text where available, focus on the element within the widget that has hover text. After a small delay, the text will appear as if the user hovered over the element with a mouse cursor.

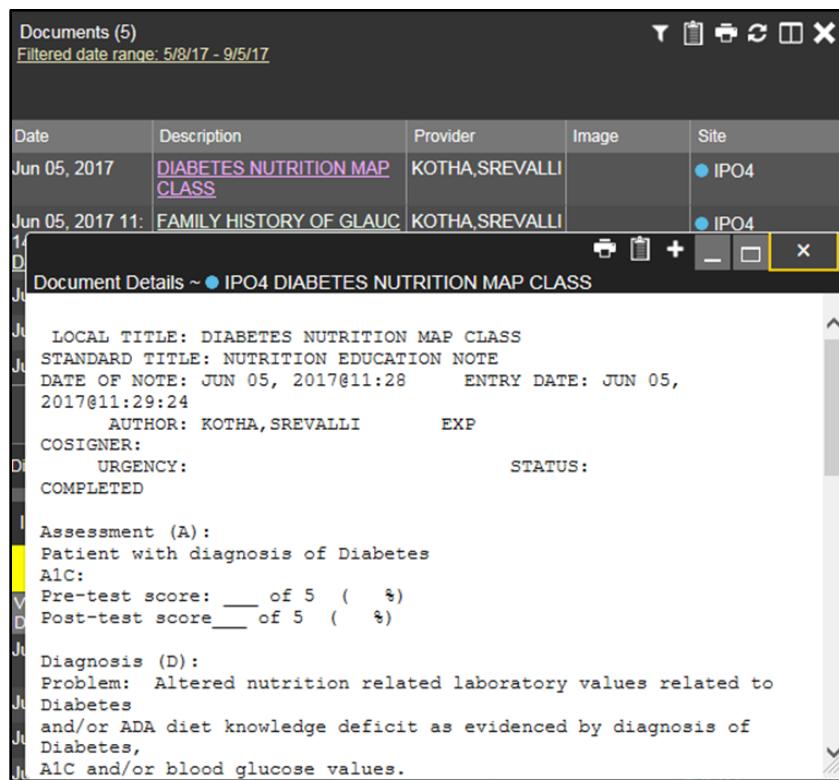
**Figure 19: Navigation Using Elements with Keyboard Focus**

The screenshot displays the JLV software interface with several windows open:

- Top Bar:** Includes the JLV logo, Patient Search, Provider Portal, Patient Portal, System Status, and a user icon for WOODROOF, SOPHIA M.
- Commonly Used Widgets:** Shows IPO4, IPO5, and DoD buttons.
- Patient Profile Window:** For IPOAADLAND, THADDEUS A. It shows basic information like SSN (101936540), Age (72), DOB (23 Oct 1944), Race (White), and Gender (M). It also lists Appointments (1) and Insurance.
- Documents Window:** Displays a list of 5 documents with details like Date (Jun 05, 2017), Description (DIABETES NUTRITION MAP CLASS), Provider (KOTHA,SREVALU), and Site (IPO4).
- Community Health Summaries and Documents - VA (0) Window:** Shows a message "No Data".
- MHS GENESIS (0) Window:** Shows a message "No Data".
- Immunizations Window:** Displays a list of 20 immunizations with details like Vaccine Administered Date (Jul 28, 2016), Product Type (PNEUMOCOCCAL CONJUGATE), Adverse Vaccine Reaction (FEVER), and Site (IPO4).

In [Figure 20](#), the **Document** details window has keyboard focus. Move through the toolbar buttons by using the arrow keys, or by pressing **Tab**. Move to **Close (X)** and press **Enter** to close the details window. After closing the window, keyboard focus returns to the last element that had keyboard focus prior to opening the window.

**Figure 20: Document Details with Keyboard Focus**



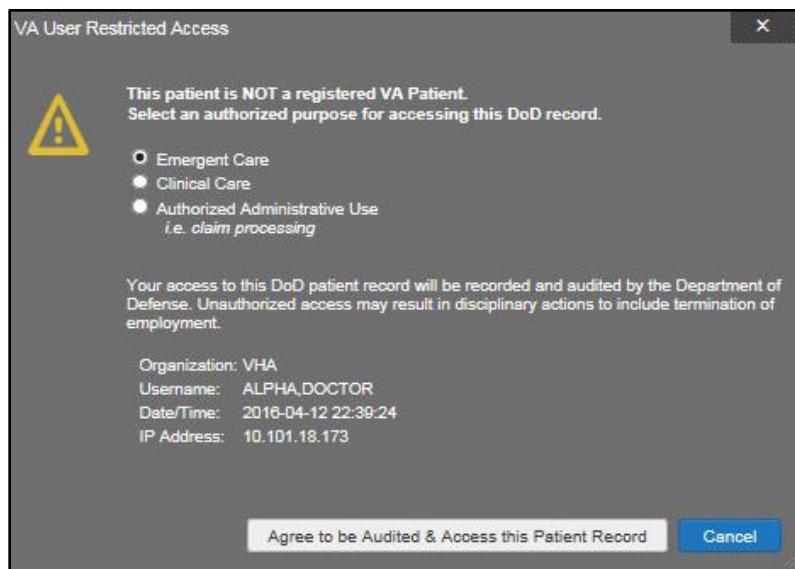
### 3.3. User-Restricted Access to Patient Data

#### 3.3.1. VHA Users Viewing DoD-only Patients

VHA users are permitted to view the records of patients considered DoD-only, meaning they either have no VA identifiers or are not registered in the Master Veteran Index (MVI). The VA requires that these actions be audited. If an attempt is made to access DoD-only patient records, the VHA user is asked to specify the purpose for access. The purpose options presented to the user are: Emergent Care, Clinical Care, or Authorized Administrative Use ([Figure 21](#)).

Once the purpose for access is selected, clicking **Agree to be Audited & Access this Patient Record** ([Figure 21](#)), displays the requested data, and audits the action. The access purpose, organization of the VA provider, date, username, IP address, user's Internal Entry Number (IEN), host system's ID, and patient's Electronic Data Interchange Personal Identifier (EDIPI) are captured in the audit record.

**Figure 21: VA User Restricted Access Dialog**

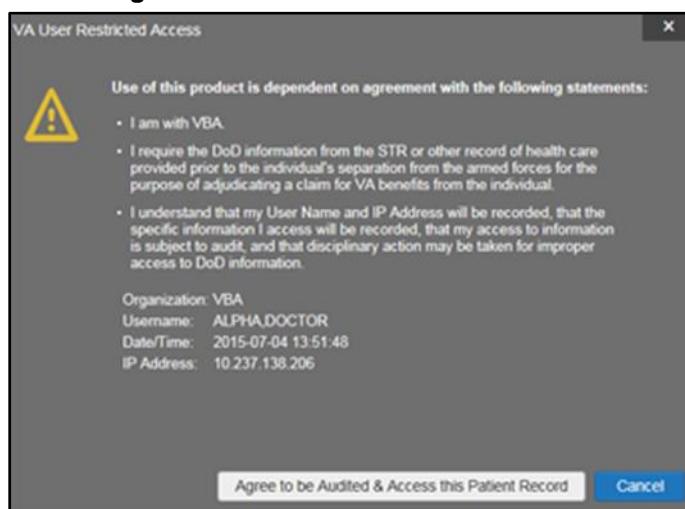


### 3.3.2. VBA Users Viewing Patients with DoD Data

VBA users may see one of two different dialog boxes, depending on whether or not the patient is registered for care in the VA. If the patient is registered for care in the VA, they are in MVI.

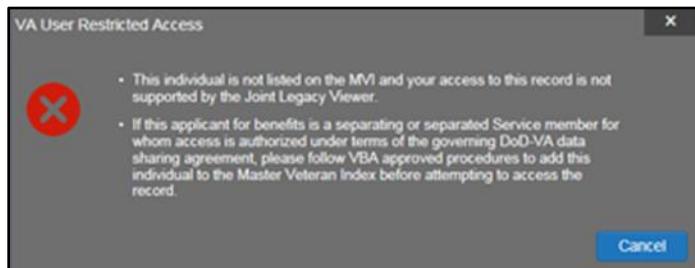
- **Patient registered in MVI:** VBA users are permitted to view the records of a patient who is registered in MVI, but the VA requires that these actions be audited
  - After performing a patient search and selecting a patient from the search results, a VBA user will see the audit notification ([Figure 22](#)) if the patient they selected is registered in MVI
  - After agreeing to the audit, the VBA user can access the patient's record

**Figure 22: VBA User Audit Notification**



- **Patient not registered in MVI:** VBA users are not permitted to access the records of a patient who is not registered in MVI
  - After performing a patient search and selecting a patient from the search results, a VBA user will see the restricted access notification ([Figure 23](#)) if the selected patient is not registered in MVI
  - Clicking **Cancel** returns the user to the previous screen

**Figure 23: Restricted Access Notification**



### 3.3.3. Access to DoD Sensitive Records

All JLV users are audited each time a sensitive DoD record is accessed. Auditing applies to sensitive documents, lab panel results, outpatient encounters, or progress notes records. For each attempt to access sensitive data, JLV records the user's name, organization, Social Security Number (SSN)/EDIPI (for DoD users), PIV (for VA users), location, patient identifiers (patient last name, first name, middle initial [MI], SSN/EDIPI [DoD only], MVI [VA only], and date of birth [DOB]), data accessed, date and time, and reason for access.

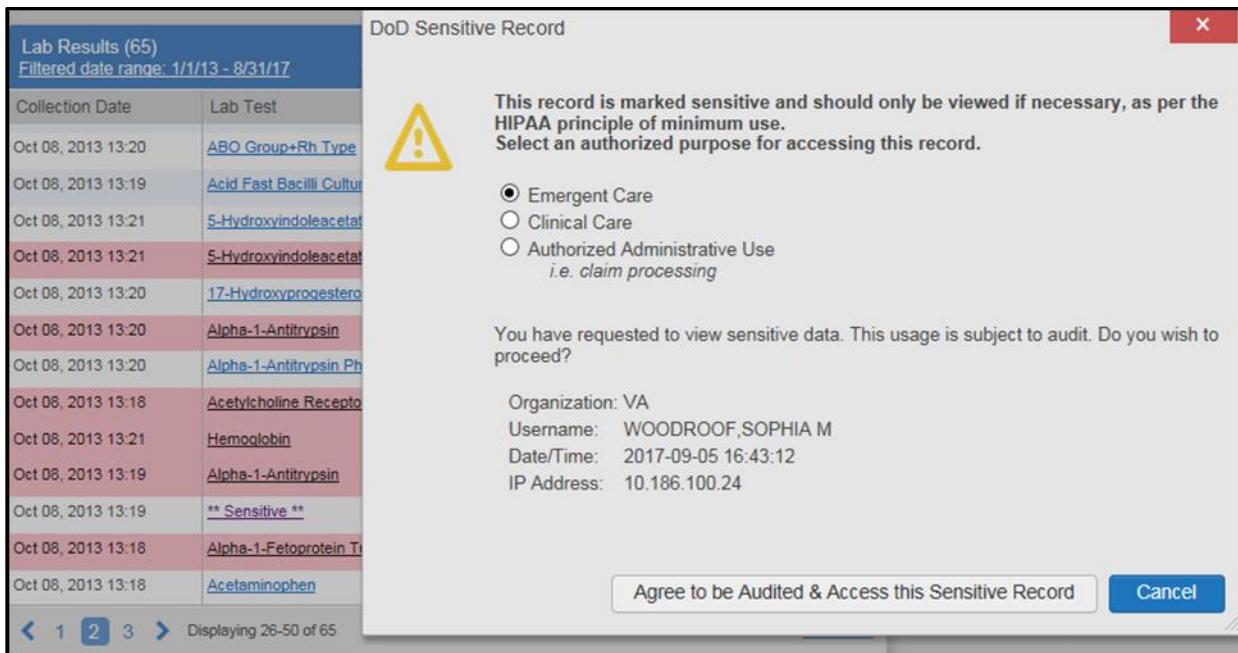


The audit prompt is seen each time access to a sensitive record is attempted, even if the user has been previously audited for the same record.

JLV notifies users before they are audited. The message is triggered when the user clicks a masked record that is marked \*\* **Sensitive** \*\*. An example of a masked record displayed in a widget and the audit notification are depicted in [Figure 24](#).

After the user selects the purpose for viewing the record and agrees to be audited, the sensitive data is displayed in the **Details** view of the widget.

**Figure 24: DoD Sensitive Record and Audit Dialog Box**



### 3.4. Patient Searches

The core function of JLV is to display patient information on the **Patient Portal** . Use the **Patient Search** feature to perform a patient search, perform a family search, or use the advanced search options.

JLV determines which enterprise service to use for a patient search, based upon the search criteria:

- If the EDIPI or Sponsor SSN is entered, JLV utilizes Patient Discovery Web Service (PDWS) for the search (See [Section 3.4.1, PDWS Search Rules and Supported Searches](#), for details)
- If the EDIPI or Sponsor SSN fields are empty, JLV utilizes MVI for the search (See [Section 3.4.2, MVI Search Guidelines](#), for details)

### **3.4.1. PDWS Search Rules and Supported Searches**

When JLV utilizes PDWS for patient search, the applicable rules and rule sets required for the PDWS interface must be used:

- **Rule Set 1:** When searching by SSN, the full nine-digit SSN must be entered, and the Last Name or DOB must also be supplied
  - This is true for search by patient SSN, as well as Sponsor SSN
- **Rule Set 2:** If you do not have the patient's SSN, you must supply ALL of the following identifiers: last name, first name, DOB, and gender
  - Blanks in any of these four required fields will generate an error
  - A 10-digit string is required for telephone number

The following search combinations are supported when PDWS is utilized:

- DoD ID, also referred to as the EDIPI
- Patient SSN and Last Name
- Patient SSN and DOB
- Sponsor SSN and Last Name
- Sponsor SSN and DOB
- Last Name, First Name, DOB, and Gender (ALL identifiers must be entered)

### **3.4.2. MVI Search Guidelines**

JLV utilizes MVI for a patient search when the search parameters include the patient's name and SSN. MVI requires the full last name is entered when the patient's SSN is entered. MVI may also require entering the patient's first name and DOB to increase the efficiency of the search, and the likelihood of locating the patient. An example would be searching for a patient with a common last name, such as Smith or Jones.

### **3.4.3. Patient Search Using DoD ID**

To perform a patient search using the DoD ID ([Figure 25](#)):

1. Click the **Patient Search** icon  at the top of the portal pages
  - a. The **Patient Search** dialog opens
2. Enter the 10-digit patient DoD ID (EDIPI) in the **DoD ID** field

**Figure 25: DoD ID (EDIPI) Search**

The screenshot shows the 'Patient Search' dialog box. At the top, there is a field for 'DoD ID' containing '1606681433'. Below it, there is an 'OR' operator and fields for 'SSN' (labeled 'Please Enter Patient SSN') and 'Sponsor SSN' (labeled 'Please Enter Sponsor SSN'). There are also fields for 'Last Name' and 'First Name'. A link '[<< Show Advanced Search Options](#)' is present. A note at the bottom left states '\* When searching by SSN, Last Name or DOB is required.' On the right, a blue 'Search' button is visible. Below the search area, there are two tabs: 'Recently Viewed Patients' (selected) and 'Search Results'. The 'Search Results' table has columns for Name, SSN, Date of Birth, and Gender. One result is listed: 'IPOAADLAND, THADDEUS A' with SSN '101936540', Date of Birth '19441023', and Gender 'M'.

3. Click **Search**
  - a. The search results are displayed in the lower third of the dialog box, under the **Search Results** tab
4. Click a patient's name in the search results list to open the associated record
  - a. The Name, SSN, DOB, and Gender columns in the results list provide information to assist with patient identification
5. After selecting a patient, the **Patient Portal**  opens and displays the selected patient's data

#### **3.4.4. Patient Search Using SSN**

To perform a patient search using the patient's SSN:

1. Click the **Patient Search** icon  at the top of the portal pages
  - a. The **Patient Search** dialog box opens
2. Enter the patient's full, nine-digit SSN in the **SSN** field ([Figure 26](#))
  - a. When searching by SSN, either the last name or the DOB *must* be entered to perform the search

**Figure 26: SSN Search**

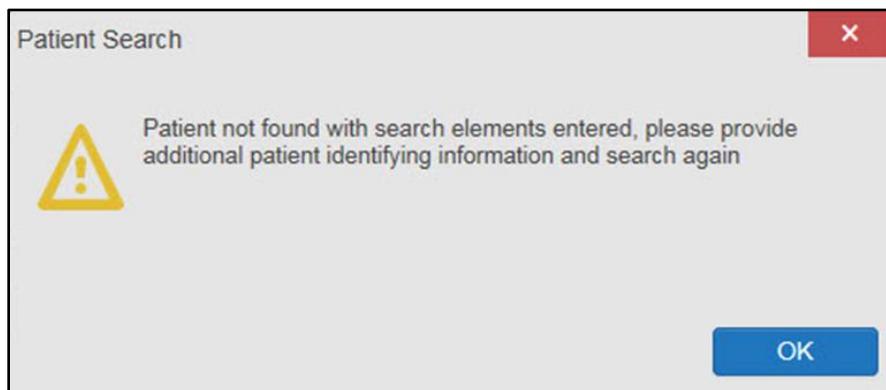
The screenshot shows a 'Patient Search' dialog box. At the top, there are fields for 'DoD ID' (placeholder: 'Please Enter Patient DoD ID') and 'SSN' (value: '101-93-6540'), with an 'OR' connector between them. Below these are fields for '\* Last Name' ('IPOAADLAND') and 'First Name' (empty). A link '[<< Show Advanced Search Options](#)' is present. A note at the bottom left states: '\* When searching by SSN, Last Name or DOB is required.' To the right is a blue 'Search' button. Below the search area, tabs for 'Recently Viewed Patients' and 'Search Results' are visible. The 'Search Results' tab is active, displaying a table with one row:

Name	SSN	Date of Birth	Gender
IPOAADLAND, THADDEUS A	101936540	19441023	M

**3. Click Search**

- If the required patient identifiers are not provided, hover text appears, indicating the information necessary to complete the patient search
- If a match of patient names cannot be made, enter additional identifiers (first name, DOB) to refine the search (Figure 30)

**Figure 27: Additional Identifiers Needed**



4. The search results are displayed in the lower third of the dialog box, under the **Search Results** tab
5. Click a patient's name in the search results list to open the associated record
  - a. The Name, SSN, DOB, and Gender columns in the results list provide information to assist with patient identification
6. After selecting a patient, the **Patient Portal**  opens and displays the selected patient's data

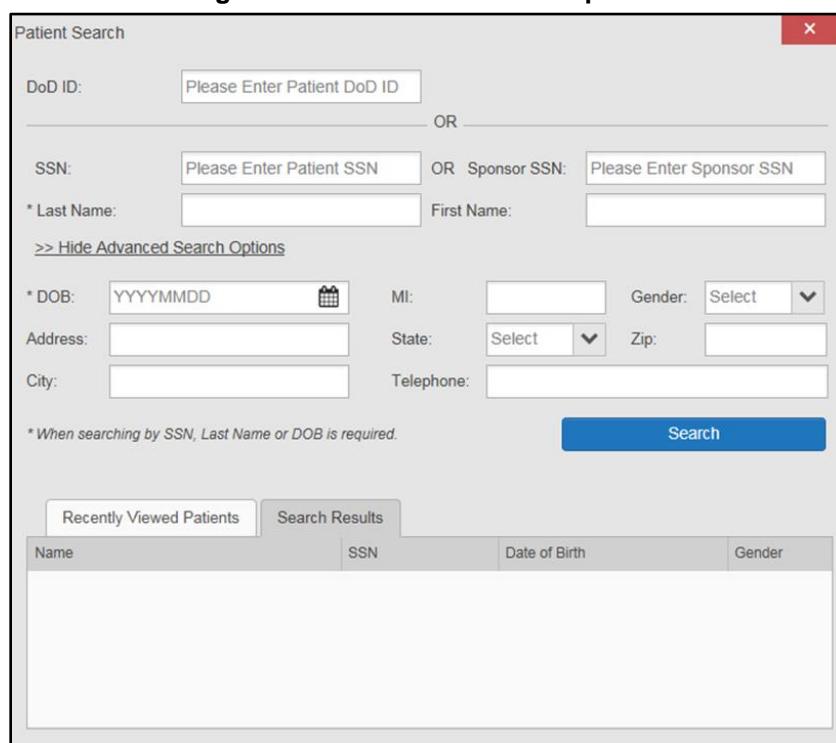
### 3.4.5. Advanced Patient Search Options

Advanced patient search options in the **Patient Search** dialog box allow for the use of additional patient identifiers when performing a patient search.

To search using advanced patient search options:

1. Click the **Patient Search** icon  at the top of the portal pages
2. Click the [<<Show Advanced Search Options](#) link under the **\*Last Name** field (seen in [Figure 26](#))
3. Enter the patient identifiers in the appropriate search fields, as desired
  - a. Advanced search option fields include **\*DOB, MI, Gender, Address, State, City, Zip, and Telephone**

**Figure 28: Advanced Search Options**



The screenshot shows the 'Patient Search' dialog box. At the top, there are fields for 'DoD ID' and 'SSN', each with a placeholder 'Please Enter Patient [Field]'. Below these is an 'OR' separator. Underneath is a section for 'Last Name' with fields for 'First Name' and 'Last Name'. A link '">>> Hide Advanced Search Options' is visible. The main search area contains fields for 'DOB' (with a date picker), 'Address', 'City', 'MI', 'State', 'Gender' (a dropdown menu), 'Zip', and 'Telephone'. A note at the bottom left states '\* When searching by SSN, Last Name or DOB is required.' To the right of the note is a large blue 'Search' button. At the very bottom of the dialog, there are tabs for 'Recently Viewed Patients' and 'Search Results', followed by a table header with columns for 'Name', 'SSN', 'Date of Birth', and 'Gender'.

4. Click **Search**
  - a. If the required patient identifiers are not provided, hover text appears, indicating the information necessary to complete the patient search
5. The search results are displayed in the lower third of the dialog box, under the **Search Results** tab
6. Click a patient's name in the search results list to open the associated record
  - a. The Name, SSN, DOB, and Gender columns in the results list provide information to assist with patient identification
7. After selecting a patient, the **Patient Portal**  opens and displays the selected patient's data

### 3.4.6. Family Member Search

A family member search can be performed using the **Sponsor SSN** field in the **Patient Search** dialog box.

To perform a family member search:

1. Click the **Patient Search** icon  at the top of the portal pages
  - a. The **Patient Search** dialog box opens
2. Enter the SSN in the **Sponsor SSN** field
  - a. The **Last Name** or **DOB** of the patient must also be entered in the appropriate fields ([Figure 29](#))
3. Click **Search**
  - a. If the required patient identifiers are not provided, hover text appears indicating the information necessary to complete the patient search
4. The search results are displayed in the lower third of the dialog box, under the **Search Results** tab ([Figure 29](#))

**Figure 29: Sponsor SSN Search**

The screenshot shows a search interface titled "Patient Search". It includes fields for "DoD ID" (with placeholder "Please Enter Patient DoD ID") and "SSN" (with placeholder "Please Enter Patient SSN"). An "OR" operator is present between these fields. Below them, "Last Name" is set to "Phillips" and "First Name" is empty. A "Sponsor SSN" field contains "666-46-0945". A link "[<< Show Advanced Search Options](#)" is visible. A note at the bottom left states "\* When searching by SSN, Last Name or DOB is required." A blue "Search" button is on the right. Below the search area, tabs for "Recently Viewed Patients" and "Search Results" are shown, with "Search Results" being active. A table displays search results for "Pierce, Ruth M." with columns for Name, SSN, Date of Birth, and Gender. The data is: Name = Pierce, Ruth M., SSN = 666460945, Date of Birth = 19880422, Gender = F.

Name	SSN	Date of Birth	Gender
Pierce, Ruth M.	666460945	19880422	F

5. Click a name in the **Search Results** list
  - a. The **Family Members** dialog opens ([Figure 30](#))
  - b. The sponsor's identifiers and a list of dependents are displayed in the dialog
6. Click a name in the list of family members to open the associated record
7. After selecting a patient, the **Patient Portal**  opens and displays the selected patient's data

**Figure 30: Family Members Dialog Box**

The screenshot shows a modal dialog box titled "Family Members". At the top left is a "Sponsor:" field containing "Pierce, Ruth M". Below it is a table header row with columns: Name, SSN, Date of Birth, and Gender. Underneath is a table body row showing "Pierce, Ruth M" with values: 666460945, 19880422, and F. Below this is another table with columns: Name, DoD ID, SSN, Date of Birth, and Gender. It contains two rows: one for "Pierce, ROB" with values: 1903120197, 666478198, 20091210, and M; and another for "Phillips, Rick Adam" with values: 1901651911, 666307647, 19880208, and M. At the bottom right of the dialog is a "Cancel" button.

Name	SSN	Date of Birth	Gender
Pierce, Ruth M	666460945	19880422	F

Name	DoD ID	SSN	Date of Birth	Gender
Pierce, ROB	1903120197	666478198	20091210	M
Phillips, Rick Adam	1901651911	666307647	19880208	M

### 3.4.7. Recently Viewed Patients List

Users who have previously logged into JLV, searched for a patient, and viewed that patient's records, can see and access a list of recently viewed patients. A recent patient is defined as a patient whose record has been viewed (opened) by the user.

**NOTE:** The **Recently Viewed Patients** list does not include search history or recent search results, only a list of patients whose data was accessed and viewed. The list is limited to 10 patients.

To open the list of recently viewed patients:

1. Click the **Patient Search** icon  at the top of the portal pages
  - a. The **Patient Search** dialog box opens
2. Click the **Recently Viewed Patients** tab in the lower third of the **Patient Search** dialog box
3. A list of recently viewed patients is displayed ([Figure 31](#))
  - a. The Name, DoD ID, SSN, DOB, and Gender columns in the results list provide information to assist with patient identification
4. Click a patient's name in the **Recently Viewed Patients** list to open the associated record
5. After selecting a patient, the **Patient Portal**  opens and displays the selected patient's data

**Figure 31: Recently Viewed Patients List**

Patient Search X

DoD ID:

OR

SSN:  Please Enter Patient SSN OR Sponsor SSN:  Please Enter Sponsor SSN

\* Last Name:  First Name:

[<< Show Advanced Search Options](#)

\* When searching by SSN, Last Name or DOB is required.

Search

Recently Viewed Patients Search Results

Name	DoD ID	SSN	Date of Birth	Gender
IPOBEHAN, SAUL G	1606682375	101551411	17 Jun 1920	M
IPOABOOD, VANCE EUGENE	1606681182	101942147	03 Nov 1948	M
IPOAADLAND, THADDEUS A	1606681433	101936540	23 Oct 1944	M

## 4. Widgets

Widgets are elements on the JLV portal pages that display data specific to a clinical domain. By default, widgets are displayed in minimized view on the portal pages ([Figure 32](#)), but can be expanded to view additional details. The list of available widgets is provided in a horizontal tray at the bottom of the page.



Widgets may take anywhere between 10 seconds to 90 seconds to load, depending on the date range settings.

**Figure 32: Widgets on the Patient Portal**

The screenshot shows the JLV Patient Portal interface. At the top, there's a navigation bar with links for Patient Search, Provider Portal, Patient Portal, System Status, and a user profile for WOODROOF,SOPHIA M. Below the navigation bar, there's a toolbar with icons for IPO4, IPO5, and DxD. A search bar and a "Commonly Used Widgets" button are also present. The main content area contains several widgets:

- IPOAADLAND, THADDEUS A •**: A patient summary card showing basic information like address, phone number, and gender.
- Appointments (1)**: A list of one appointment scheduled for June 26, 2017, at CHY ANTICOAG with provider KOTHA,SREVALU.
- Documents (5)**: A list of five documents with their dates, descriptions, providers, and sites (IPO4 or IPO5). Examples include "DIABETES NUTRITION MAP CLASS" and "FAMILY HISTORY OF GLAUCOMA".
- Community Health Summaries and Documents - VA (0)**: A placeholder for community health summaries.
- Immunizations (20)**: A list of immunizations with their dates, vaccine administered, product type, adverse vaccine reaction, and site (IPO4 or IPO5). Examples include "PNEUMOCOCCAL CONJUGATE" and "INFLUENZA UNSPECIFIED FOR".
- MHS GENESIS (0)**: A placeholder for MHS GENESIS documents.

At the bottom right of the main content area, there's a link to "Open Widget Tray".

### 4.1. Accessing and Opening Widgets

Widgets can be opened, rearranged, and closed. All available widgets are displayed in the widget tray, at the bottom of the portal pages ([Figure 33](#)).

**Figure 33: Widget Tray**

The screenshot shows the "Widget Tray" at the bottom of a portal page. It consists of a horizontal tray with 15 icons, each representing a different clinical domain. From left to right, the icons are:

- Admissions
- Allergies
- Appointments
- Clinical Reminders
- Community Health Summaries and Documents - VA
- Consult Encounters
- Documents
- Health Summaries
- Immunizations
- Inpatient Medications
- MHS GENESIS
- Orders
- Outpatient Encounters
- Outpatient Medications

At the top of the tray, there's a header "Drag and Drop Widgets to Your Portal" and a link "More Widgets >". At the bottom of the tray, there are scroll bar arrows (< and >) for navigating through the list of available widgets.

To place a widget on the Patient Portal:

1. Open the widget tray by clicking the **Open Widget Tray** link in the bottom-right corner of the portal page
2. Use the scroll bar arrows < > at either end of the tray to see all widget choices

**-OR-**

3. Click the **More Widgets >>** link to scroll through the list of widgets
4. Click and hold a widget in the tray, then drag it to the portal page and drop it in the desired location
5. The widget is docked on the portal page, and opens in minimized view
6. Close the widget tray by clicking the **Close Widget Tray** link

Widgets can be closed (removed from the portal page) by clicking the **Close** icon  in the top-right corner of the widget. Rearrange the widgets displayed on the portal page by dragging and dropping them.

## 4.2. Widget Navigation and Display Options

Each widget has tools and display options available to navigate through, and change, the display of data. The vertical scroll bar allows the user to move through, and view, the widget's data. The options at the bottom of a widget provide various ways to see all the records loaded for the widget's clinical domain.

Navigation icons and actions are detailed in [Table 4](#).

**Table 4: Navigation Icons and Actions**

Navigation Icon/Action		Description
	Go to Previous Page	Changes the focus of the widget to the previous group or page of records within the results display.
	Jump to Page	Changes the focus of the widget to the page number selected.
	Go to Next Page	Changes the focus of the widget to the next group or page of records within the results display.
<b>More &gt;&gt;</b>	Go to Expanded View	Available in minimized views only. Opens the expanded view of the widget in a secondary window.
<b>1-25 of 55</b>	Record Display Indicator	Indicates the number of records displayed in that widget page out of the total number of results for that widget.
<b>Show All/ Show Paged</b>	Display Setting	Click <b>Show All</b> to open all records for a given widget in a scrollable window. Click <b>Show Paged</b> to return to the display of records grouped by pages.

When there are more than 25 records available in a widget, they are grouped in **Show Paged** view. Records 1 through 25 can be viewed by using the widget's vertical scroll bar. Records 26+ can be viewed by using the page navigation options, in the lower left corner of the widget, to jump to subsequent pages. The expanded view of a widget contains a **Show All** link, which

opens all records for that widget, in a scrollable window. Click **Show Paged** to return to the display of records grouped by pages.

## 4.3. Widget Toolbars

There is a toolbar in the upper right corner of both the minimized and expanded views of each widget, and most dialog boxes. Toolbar icons vary by widget, open dialog box, and window. [Table 5](#) describes the functionality of each toolbar icon.

**Table 5: Widget Toolbar Icons**

Icon	Name	Function
	Add to Report Builder	Adds the information displayed in the window to the Report Builder. This icon is available for supported domains when a record has a Details or Notes view that displays in a standalone window.
	Close	Removes the widget from the portal screen or closes a dialog box.
	Column Settings	Used to configure the columns within the widget. Turn on or off the columns displayed by checking the column names that appear in the pop-up box and checking <b>Apply</b> .
	Configure Filter	Used to filter on specific record types or other elements within the widget, including a date filter. If a date range filter is applied in an open widget, the date range is displayed in the widget header. <b>Note:</b> After setting a filter, the <b>Close Filter</b> option is enabled in the widget. Clicking <b>Close Filter</b> will restore the full display of records within the widget.
	Copy to Clipboard	Copies the content of the open window to the clipboard for pasting into another application. Copy to Clipboard is disabled in the widget toolbar after clicking <b>Show All</b> within a widget.
	Connection Status	Both icons provide a status indicator for DoD, VA, and community partner data sources. The circle with the lowercase "i"  indicates all sources are available. The yellow triangle warning  indicates one or more data sources are unavailable. Clicking either status icon will open the connection status details in a separate window. <b>Note:</b> Connection status updates are not available from the <b>Clinical Reminders</b> widget.
	Print	Prints the contents of the open window. Printing is disabled in the widget toolbar after clicking <b>Show All</b> within a widget. <b>Note:</b> It is recommended that JLV users have the latest Adobe Reader installed for the Report Builder and other printing features.
	Refresh	Refreshes the widget or window display. Only the data within that widget's dataset is updated.
	Rx	Converts the medication data within the widget to text, and opens the text in a pop-up window. Available from the <b>Outpatient Medications</b> widget.

Icon	Name	Function
	Site List	Opens a list of community sites where the patient has been seen (only available from the <b>Community Health Summaries and Documents–VA</b> widget).
	VHIE Refresh	Refreshes VHIE-enabled widgets with the community partner data stored in the VHIE cache, in addition to refreshing DoD and VA data. <b>NOTE:</b> The VHIE Refresh icon is shown in VHIE-enabled widgets <i>only</i> when <b>Include Community Data</b> is enabled. (The <b>Community Data</b> option will be available in a future release.)

## 4.4. Minimized vs. Expanded Widget View

Each widget can be displayed in either a minimized (default) or an expanded view. Minimized view displays a simple list of the available patient data for a clinical domain, arranged in reverse chronological order by default. Expanded view provides a detailed list of similarly arranged patient data. When the expanded view of a widget is launched, it opens in a new, separate window that displays more attributes of the records in the widget, including additional, sortable columns of data.



The **Community Health Summaries and Documents - VA** widget does not have an expanded view. Instead, a document opened from the minimized view of the widget is displayed in a new, separate window.

Click the **More >>** link at the bottom of a widget to launch the expanded view, and see the additional display and functionality options.

### 4.4.1. Date Range Filters

Patient data displayed within a widget can be filtered by date range. If a date range filter is applied, the selected range is indicated in the widget header, below the title. Click the **Configure Filter** icon or the **Filtered Date Range** link on the widget toolbar to change the date range of the data displayed ([Figure 34](#)).

**Figure 34: Date Range Filters Applied**

The screenshot displays four widgets from the Patient Portal, each with a yellow box highlighting the "Filtered date range" link:

- Appointments (147)**: Shows a list of scheduled appointments. The header includes "Filtered date range: 1/1/14 - 8/31/17".
- Consult Encounters (6)**: Shows a list of consult encounters. The header includes "Filtered date range: 1/1/14 - 8/31/17".
- Vitals (42)**: Shows a list of vital signs. The header includes "Filtered date range: 1/1/14 - 8/31/17".
- Immunizations (48)**: Shows a list of immunizations. The header includes "Filtered date range: 1/1/14 - 8/31/17".

There are two ways to filter the date range of data displayed in a widget: the **Quick Date Range** filter and the **Start and End Date** filter. If the expected information does not appear in the widget display, use the date filter options to change the date range.



Changes made to the date range in a widget persist from minimized to expanded view, patient to patient, and session to session, until the widget is either removed, or the date range is changed.

#### 4.4.1.1. Quick Date Range Filter

Use the preset, **Quick Date Range** filter to set or limit the display of patient records within a particular widget. This option is available by clicking the [Filtered Date Range](#) link, or by clicking the **Configure Filter** icon  in a widget on the **Patient Portal**.

Clicking a **Quick Date Range** filter refreshes the data displayed to show only the records for the selected range. The options represent time counting back from the present day (for example, selecting 2y will display only records within the last 2 years). Examples of preset date ranges include 1w (last 7 days), 6m (last 6 months), and 3y (last 3 years).



The **Quick Date Range** filter is contextual. If today is February 2, 2017, the preset filters will count backwards using that date. If today is April 16, 2017, the preset filter will count backwards using that date.

[Figure 35](#) highlights the **Quick Date Range** filter options in the expanded view of the **Documents** widget.

**Figure 35: Quick Date Range Filter Options**

The screenshot shows a search interface for 'Documents (5)'. At the top, there are date range filters: 'Start date: 05/08/2017' and 'End date: 09/05/2017'. Below these are several dropdown filters: 'Filter by Description', 'Filter by Standardized Description', 'Filter by Provider Specialty', 'Filter by Location', 'Filter by Source System', and 'Filter by Site'. A yellow box highlights the date range buttons: '1w', '2w', '1m', '3m', '6m', '1y', '2y', and '3y'. The main area displays a table of search results:

Date	Description	Standardized Description	Provider	Provider...	Location	Status	Im...	Source System	Site
Jul 31, 2017	<a href="#">DENTAL</a>		PETERSON, BILL	All allopathic and osteopathic physicians		PENDING		VistA	IPO 4
Jul 31, 2017	<a href="#">DENTAL</a>		PETERSON, BILL	All allopathic and osteopathic physicians		PENDING		VistA	IPO 4
Jun 23, 2017	<a href="#">ECHOGRAM CHEST B-SCAN</a>	ULTRASOUND, CHEST (INCLUDES MEDIASTINUM), REAL TIME WITH IMAGE DOCUMENTATION						VistA	IPO 4
Jun 05, 2017	<a href="#">DIABETES NUTRITION MAP CLASS</a>	Education note	KOTHA,SRE VALLI	All allopathic and osteopathic physicians	CHYSQA260			VistA	IPO 4
Jun 05, 2017 11:14 Details	<a href="#">FAMILY HISTORY OF GLAUCOMA</a>		KOTHA,SRE VALLI	All allopathic and osteopathic physicians	CHY ANTICOAG			VistA	IPO 4

At the bottom left, it says 'Displaying 1-5 of 5'. On the right, there is a 'Show All' link.

#### 4.4.1.2. Start and End Date Filter

Use the **Start Date and End Date** filter to display data for a specific time range. The start and end date fields are available at the top of multiple widgets by clicking the **Filtered Date Range** link, or by clicking the **Configure Filter** icon



The **Start and End Date** filter is static. If the start date is set to June 2, 2016 and the end date is set to June 2, 2017, the data in that date range will display, no matter what today's date is.

[Figure 36](#) provides an example of the start and end date filter fields in the expanded view of the **Radiology Reports** widget.

**Figure 36: Start and End Date Display Filter**

The screenshot shows a JLV widget titled "Documents (42)". At the top, there's a header with "Filtered date range: 1/1/14 - 8/31/17" and a "Close Filter" button. Below the header is a date range filter section with "Start date: 01/01/2014" and "End date: 08/31/2017". A yellow box surrounds these two fields and the "Apply" button. To the right of the "Apply" button are links for "1y", "2w", "1m", "3m", "6m", "1y", "2y", and "3y". Further down are "Filter by Description" and "Filter by Source System" dropdowns, and a date picker for "Date" and "Description". The main content area displays a table of documents with columns for "Provider", "Provider Spec...", "Location", "Status", "Image", "Source System", and "Site". The table lists several entries, such as PETERSON,BILL, KOTHA,SREVAL LI, and BLACKSTAD,GO NZALO W, along with their respective details like "ULTRASOUND, CHEST (INCLUDE S MEDIASTINUM), REAL TIME WIT H IMAGE DOCUMENTATION" and "EDUCATION NOTE". The table also includes icons for image and pending status.

To set a custom date range:

1. Click the **Calendar** icon next to **Start Date**
2. Select a month, day, and year start date for the display filter



**NOTE:** The custom date range option requires that a specific day is selected within the calendar. If no day is selected, the custom date range will not be applied.

3. Click the **Calendar** icon next to **End Date**
4. Select the month, day, and year end date for the display filter
5. When both a start and end date have been chosen, click **Apply**

The widget refreshes and displays only the records that fall within the custom date range. The date range in use is displayed in the widget header.

## 4.5. Viewing Connection Status

JLV widgets display the status of their connection to VA, DoD, and Community Partner data sources. Connection status information is available for each widget, except **Clinical Reminders**.



**NOTE:** The Connection Status reports the condition of the connection between JLV and its external resources, while System Status reports the overall condition of the JLV application. See [Section 3.1.3, Viewing System Status](#), for more information.

The **Connection Status** icon on a widget toolbar indicates the state of the connection to VA, DoD, and community partner data sources. There are two status conditions:

- ⓘ all sources are connected (available)
- ⚠ one or more sources are not connected (unavailable)

[Figure 37](#) shows a connection status indicator icon displayed on the **Documents** widget toolbar.

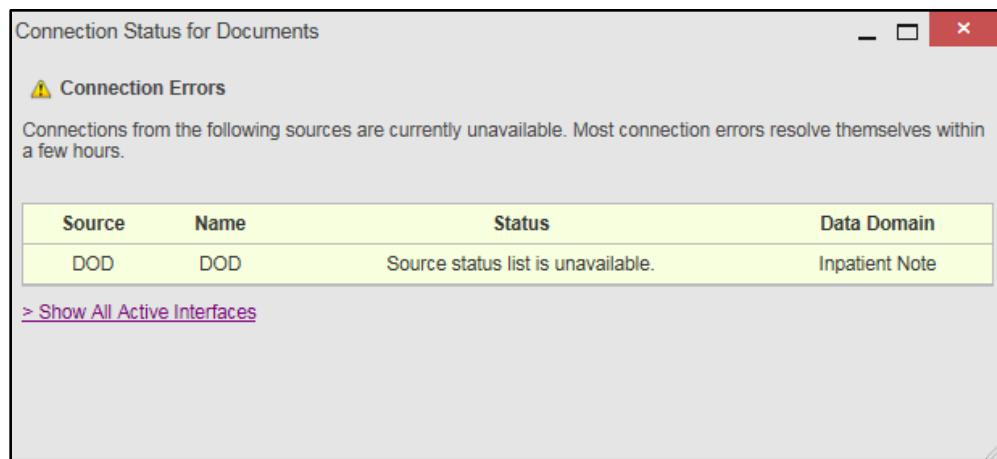
**Figure 37: Connection Status Indicator**

Date	Description	Provider	Image	Site
Apr 04, 2018	<a href="#">CARDIOLOGY CLINIC - CH EYENNE</a>	LONGHOFER, ALISA K		IPO4
Feb 06, 2018	<a href="#">CONSULT REPORT/DENTAL</a>	PETERSON,BILL		IPO5
Feb 06, 2018	<a href="#">Dental Consult</a>	PETERSON,BILL		IPO5
Feb 06, 2018	<a href="#">CONSULT REPORT/CARDIOLOGY</a>	PETERSON,BILL		IPO5
Feb 06, 2018	Dental Consult			IPO5
Feb 06, 2018	Cardiology			IPO5

Displaying 1-25 of 312 [More >>](#)

Clicking a **Connection Status** icon opens a standalone window with information about the connection to data sources ([Figure 38](#)).

**Figure 38: Connection Status Window**



Clicking the [\*\*>Show All Active Interfaces\*\*](#) link in the **Connection Status Window** ([Figure 38](#)) opens a Connection Status Details View ([Figure 39](#)).

**Figure 39: Connection Status Details**

The screenshot shows the same "Connection Status for Documents" window after clicking the "Show All Active Interfaces" link. It now displays "All Active Connections". The message at the top says: "Connections to the source systems are successful. Successful status connections are not an indicator that clinical data is being returned to the widget from the source system." Below this, a table lists ten successful connections for "DOD".

Source	Name	Status	Data Domain
DOD	ahlta	SUCCESS	Consults
DOD	tmds	SUCCESS	Consults
DOD	ahlta	SUCCESS	Progress Note
DOD	tmds	SUCCESS	Progress Note
DOD	ahlta	SUCCESS	Encounters
DOD	ahlta	SUCCESS	Questionnaires
DOD	fhiePpdf	SUCCESS	Deployment Forms
DOD	mhsgenesis	SUCCESS	Radiology Exams
DOD	share: SeymourJohnson	SUCCESS	Radiology Exams

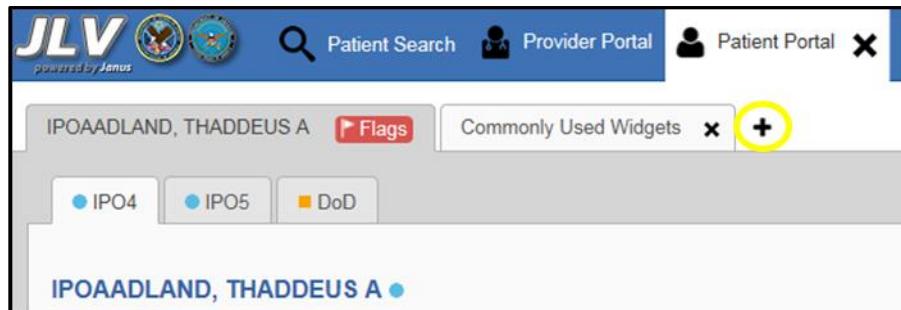
## 4.6. Displaying Widgets on Custom Tabs

You can use the *custom tabs* feature to create additional widget configurations for ease of use and quick reference. Changes made to portal page layouts (widget layouts and custom tabs) are saved to the user profile, and are displayed in future sessions.

To create a custom tab:

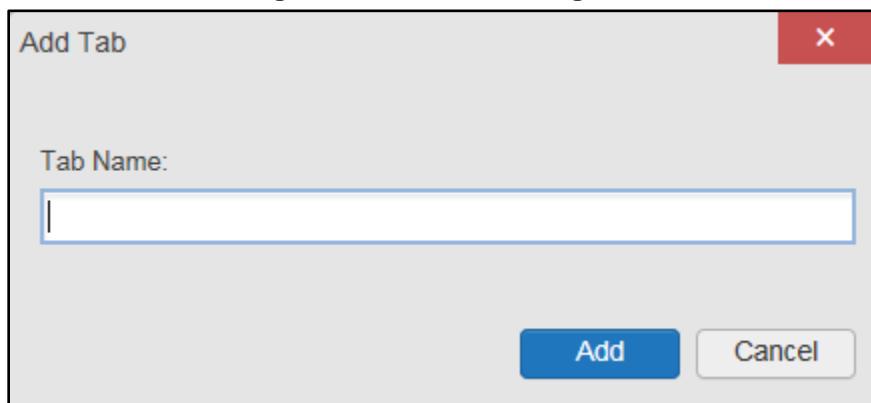
1. Click the plus sign + beside the existing tabs on the portal page ([Figure 40](#))

**Figure 40: Add Custom Tab Icon**



2. The Add Tab dialog box opens ([Figure 41](#))

**Figure 41: Add Tab Dialog Box**



3. Type the name of the new tab in the **Add Tab** dialog box and click **Add**
4. Click the **Open Widget Tray** link within the new tab space to display all available widgets
5. Click, hold, and drag each of the desired widgets to the screen



Tab configurations remain as set, until manually changed.

6. Click between tabs at any time, without losing each tab's configuration
  - a. Tab layouts persist, even when a patient change is made

- b. Custom tabs can be renamed by double-clicking the tab name

## 4.7. Refreshing Data in a Widget

The data displayed in a widget can be refreshed by clicking the **Refresh** icon . This action retrieves data from VA and DoD sources and refreshes the individual widget's display.

A widget will display the **VHIE Refresh** icon  if the widget supports community partner data, and the **Include Community Data** option is enabled. When you click the **VHIE Refresh** icon, JLV sends a new query to VHIE sources for Community Partner data.

Clicking the **VHIE Refresh** icon  in one widget refreshes all other open, VHIE-enabled widgets.



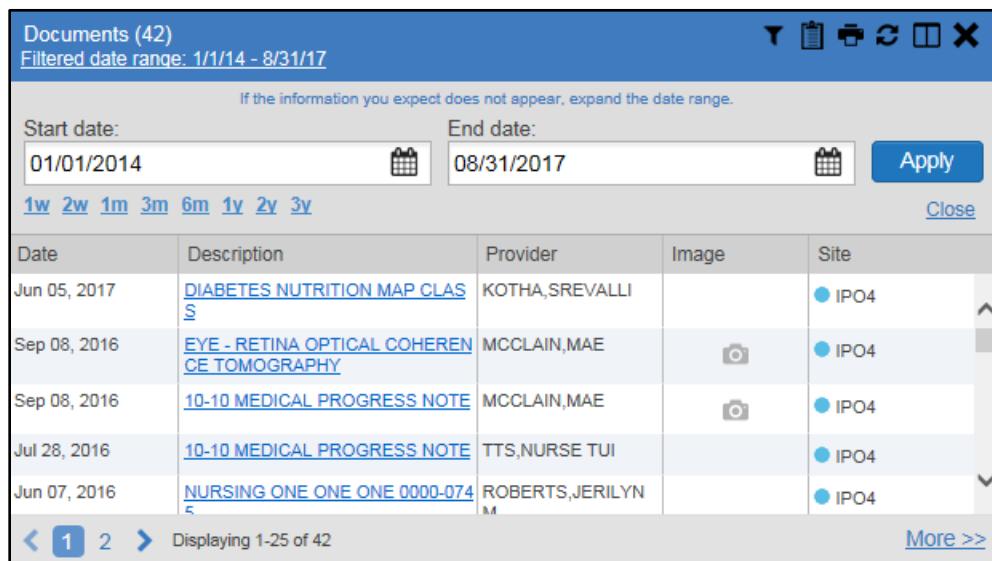
If the option to **Include Community Data** is disabled, the **VHIE Refresh** icon will not be displayed in any of the widgets that support the display of community data.

## 4.8. VistA Imaging Viewer

JLV integrates access to the VistA Imaging Viewer (an external application), allowing VA users access to VA imaging artifacts for supported clinical domains (widgets). Users can open an instance of the VistA Imaging Viewer through JLV. For more information regarding the VistA Imaging Viewer, please see the [VistA Imaging SharePoint site](#).

A **camera** icon  displayed in the **Image** column ([Figure 42](#)) of the **Documents**, **Outpatient Encounters**, **Procedures**, **Progress Notes**, and **Radiology Reports** widgets indicates that one or more images are associated with that record. Clicking the **camera** icon  within the widget opens the VistA Imaging Viewer in a standalone window and displays the associated image.

**Figure 42: Camera Icon in the Image Column**

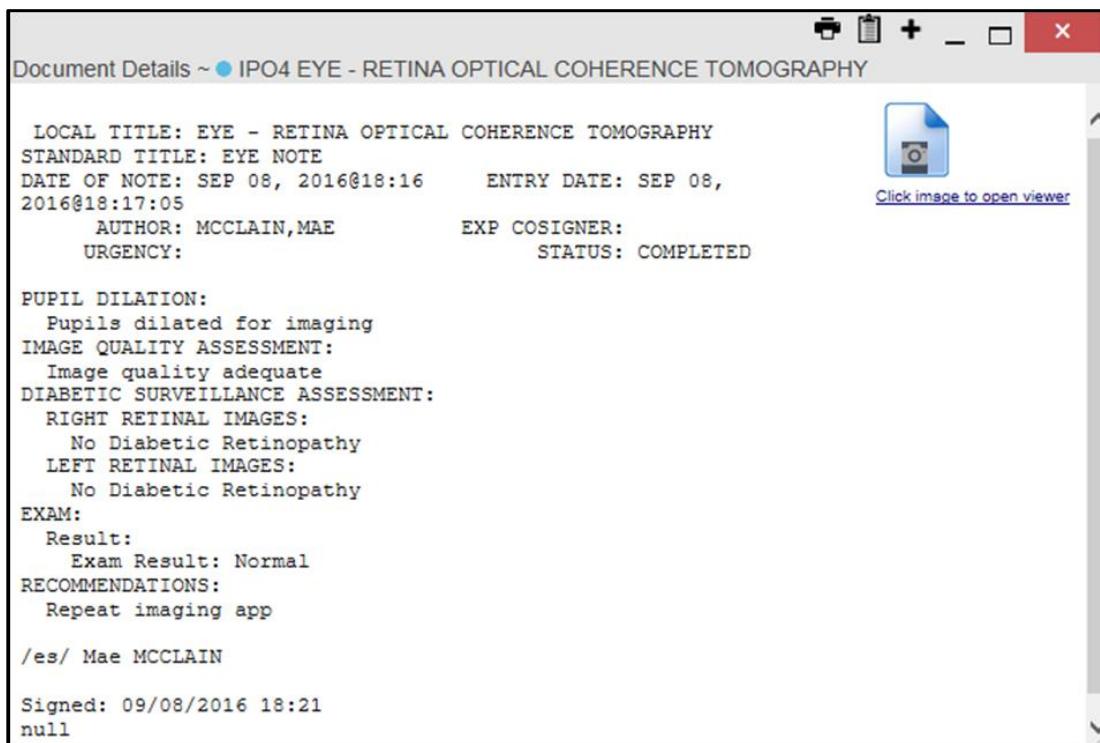


Date	Description	Provider	Image	Site
Jun 05, 2017	<a href="#">DIABETES NUTRITION MAP CLAS S</a>	KOTHA,SREVALLI		 IPO4
Sep 08, 2016	<a href="#">EYE - RETINA OPTICAL COHERENCE TOMOGRAPHY</a>	MCCLAIN,MAE		 IPO4
Sep 08, 2016	<a href="#">10-10 MEDICAL PROGRESS NOTE</a>	MCCLAIN,MAE		 IPO4
Jul 28, 2016	<a href="#">10-10 MEDICAL PROGRESS NOTE</a>	TTS,NURSE TUI		 IPO4
Jun 07, 2016	<a href="#">NURSING ONE ONE ONE 0000-0745</a>	ROBERTS,JERILYN M		 IPO4

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If a record has one or more images associated with it, the **Details** view of the record includes a display of a thumbnail in the top-right corner of the window ([Figure 43](#)). Below the thumbnail, a link that reads, **Click image to open viewer**, is also displayed. Clicking either the thumbnail or the link opens the VistA Imaging Viewer and displays the associated image(s).

**Figure 43: Thumbnail and Link in Details View**



## 4.9. Using Report Builder

The **Report Builder** feature is used to create custom reports using patient data and records displayed in JLV widgets. Content for reports can be selected from either the minimized or expanded view of a supported widget. **Report Builder** is accessed from the toolbar in the upper right corner of the **Patient Portal** (highlighted in [Figure 44](#)).

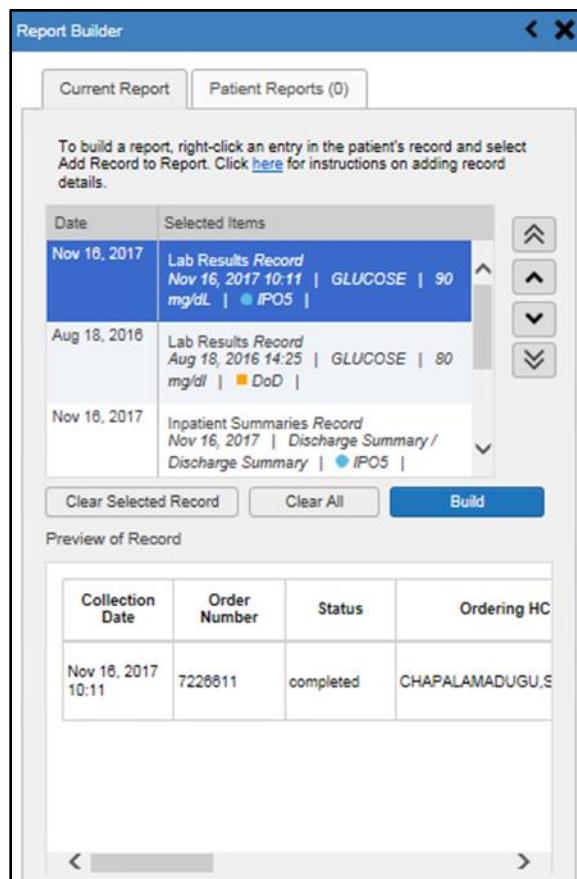
**Figure 44: Report Builder Icon**



The Report Builder pane is comprised of the **Current Report** tab ([Figure 45](#)) and the **Patient Reports** tab ([Figure 46](#)).

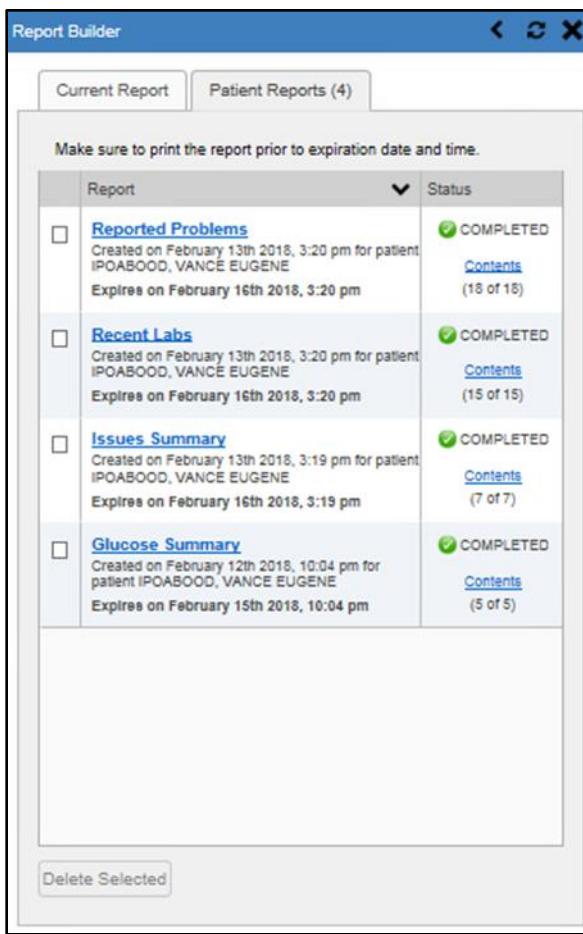
The **Current Report** tab ([Figure 45](#)) is used to build the custom report. The patient data and/or records are listed here as you select and add them. The records can be previewed and can be arranged in the desired order for the final report.

**Figure 45: Current Report Tab**



The **Patient Reports** tab ([Figure 46](#)) presents a list of all completed reports, the status of the report generation progress, the date the report will expire, and a hyperlink to the contents of the completed report.

**Figure 46: Patient Reports Tab**



Create a custom report:

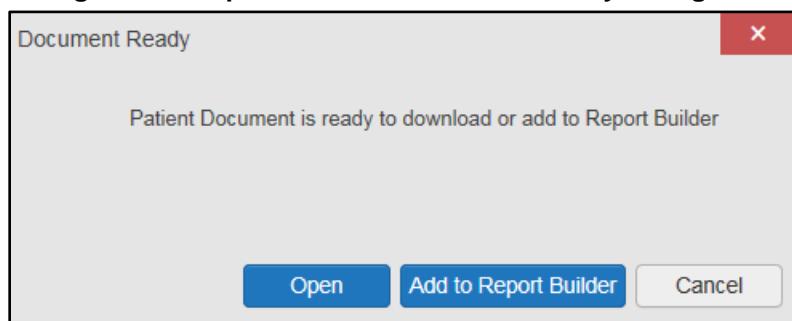
1. Click the **Report Builder** icon (highlighted in [Figure 44](#))
  - a. The **Report Builder** pane opens ([Figure 47](#))
2. Select records to add to the report:
  - a. Any record or demographics data within a widget can be added by right-clicking the entry in an open widget and selecting **Add Record to Report** ([Figure 47](#))
    - The record will be added exactly as it appears in the widget
  - b. Click the **Add to Report Builder** icon within any detailed **Demographics** tab to add demographics data, which will appear at the top of the report by default
  - c. If the desired record has a **Details** or **Notes** view, click the **Add to Report Builder** icon on the toolbar of the open **Details** or **Notes** window to add the additional record information
    - Some DoD documents do not have associated **Details** or **Notes**. Clicking on their name in the list of documents will present the dialog box shown in [Figure 47](#)

- Some DoD documents can only be added to Report Builder by opening the Details or Notes view of the document ([Figure 48](#))

**Figure 47: Report Builder Pane and Add Record to Report Option**

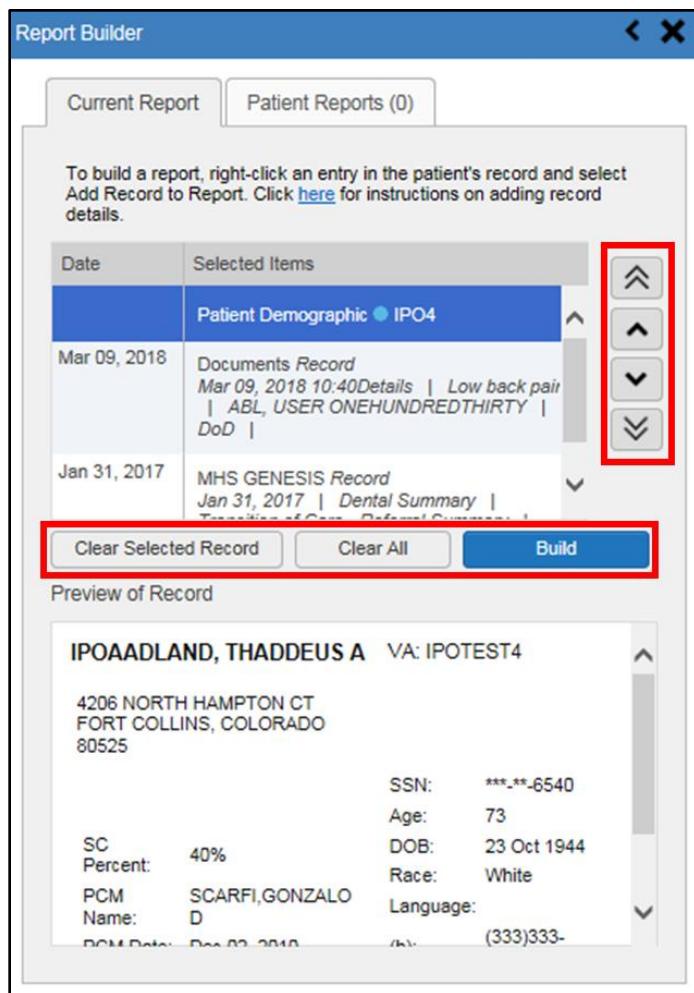
The screenshot shows the JLV Report Builder interface. On the left, there's a sidebar with 'Report Builder' tabs for 'Current Report' and 'Patient Reports (0)'. Below this is a message: 'To build a report, right-click an entry in the patient's record and select Add Record to Report. Click [here](#) for instructions on adding record details.' Underneath is a table with columns for Date, Description, Provider, Image, and Site. One row is highlighted with a red box around the 'Add Record to Report' link. To the right of this is another section titled 'Immunizations (53)' with similar columns. At the bottom of the main pane, there are navigation arrows and a message: 'Displaying 1-25 of 500 More >'. A 'More' button is also visible.

**Figure 48: Report Builder - Document Ready Dialog Box**



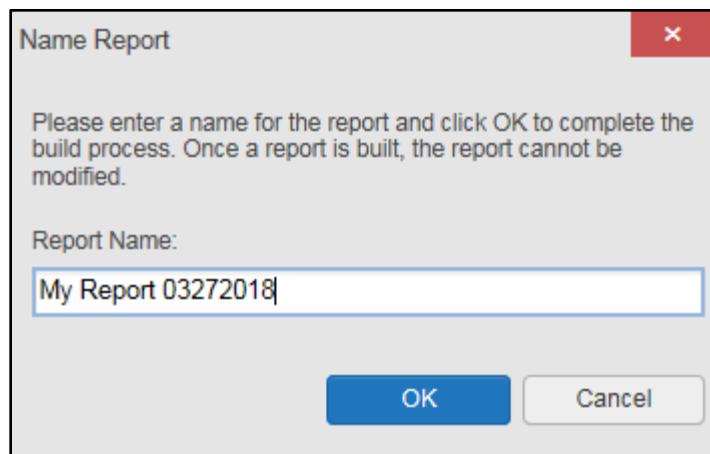
3. The selected records appear in the **Report Builder** window
4. Use the navigation arrows to the right of the listed records (highlighted in [Figure 49](#)) to arrange the records in the desired order in the generated report
  - a. Records can be removed by clicking **Clear Selected Record** or **Clear All** (highlighted in [Figure 49](#))

**Figure 49: Report Builder Pane**



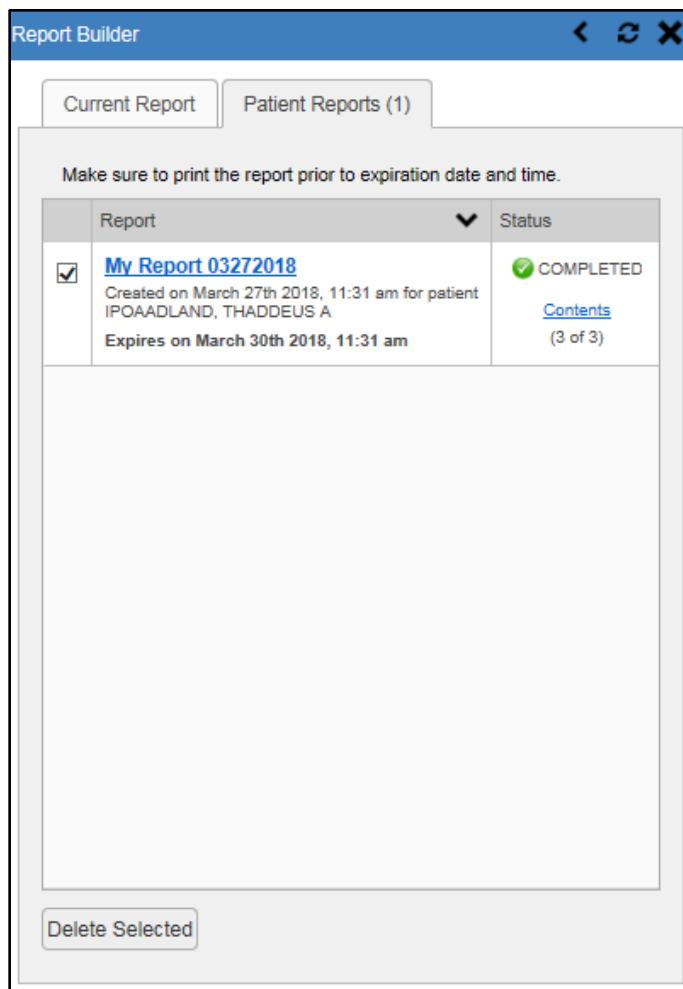
5. When a record is selected for the report, it appears in the **Preview of Record** area of the **Report Builder** pane ([Figure 49](#))
6. Click **Build** (highlighted in [Figure 49](#)) to validate the selected records and prepare the report
  - a. If a record is added to the report without an error, there will be a **Ready** notation next to it in the **Status** column
  - b. If a record cannot be added to the report, an **Error** notation will appear next to the record
7. Name the report when prompted and click **OK** ([Figure 50](#))

**Figure 50 Name Report Dialog Box**



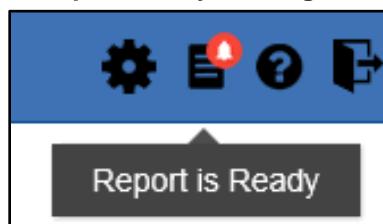
8. The **Patient Reports** tab opens and displays a report processing indicator in the **Status** column
9. When processing is complete, the **Status** column displays either *COMPLETED* or *ERROR* ([Figure 51](#))
  - a. An *ERROR* in the **Status** column does not indicate the report failed to build, it is an indicator that one or more records could not be included in the generated report
  - b. Both *COMPLETED* or *ERROR* entries will include a Contents link ([Figure 51](#)), which provides a list of the records that will appear in the generated report

**Figure 51: Patient Reports Tab - Report Ready and Delete Option**



- c. A report ready message appears for 6 seconds on the portal page when the report has been built and is ready to be printed ([Figure 52](#))
- d. A red icon ([Figure 52](#)) appears over the **Report Builder** icon when report builder is closed to indicate that a report is ready to be printed

**Figure 52: Report Ready Message and Indicator**





Once a report is created, it is available on the Patient Reports tab for 72 hours. After 72 hours, the report expires, is removed from the Patient Reports tab, and can no longer be accessed.

Open a report:

1. Click the report name in the **Report** column of the **Patient Reports** tab ([Figure 51](#)) -OR-
2. Click the **Contents** link in the **Status** column of the **Patient Reports** tab to open a list of the records included in the report in the **Report Contents** window ([Figure 51](#)) -OR-
3. Click the blue, hyperlinked report name in the **Report Contents** window ([Figure 53](#))

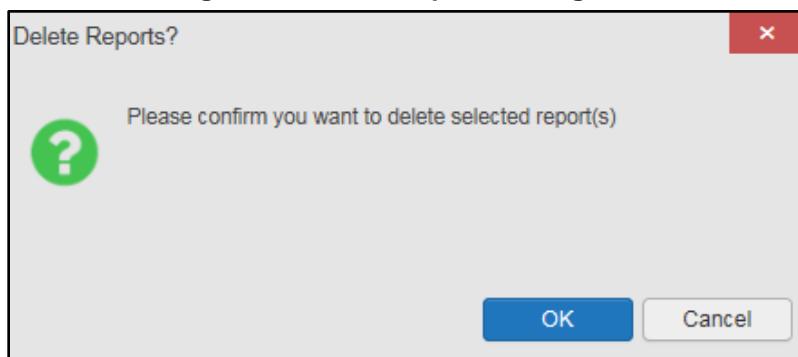
**Figure 53: Report Contents Window**

Record	Status
Lab Results Record Nov 16, 2017 10:11   GLUCOSE   90 mg/dL   IPOS	READY
Lab Results Record Aug 18, 2016 14:25   GLUCOSE   80 mg/dL   DoD	READY
Inpatient Summaries Record Nov 16, 2017   Discharge Summary / Discharge Summary   IPOS	READY
Documents Record Jan 10, 2016   Administrative Note   ABL, USER NINETEEN   DoD	READY

Delete a report:

1. Select the checkbox to the left of the report name on the **Patient Reports** tab ([Figure 51](#))
2. Click the **Delete Selected** button
3. Click **OK** to confirm deletion ([Figure 54](#))

**Figure 54: Delete Reports Dialog Box**



## 4.10. Printing

The data list of a widget in either minimized or expanded view, the details window of a widget, and reports created in Report Builder can be printed.

To print the data list of a widget in either minimized or expanded view click the **Print** icon  on the desired widget's toolbar.

To print the details window of a widget, click the **Print** icon  on the details window's toolbar.

To print a report created in **Report Builder**, click the **Print** icon within the report window.

Each report generated using **Report Builder** includes this disclaimer:



*The information contained in this transmission may contain privileged and confidential information, including patient information protected by federal and state privacy laws.*

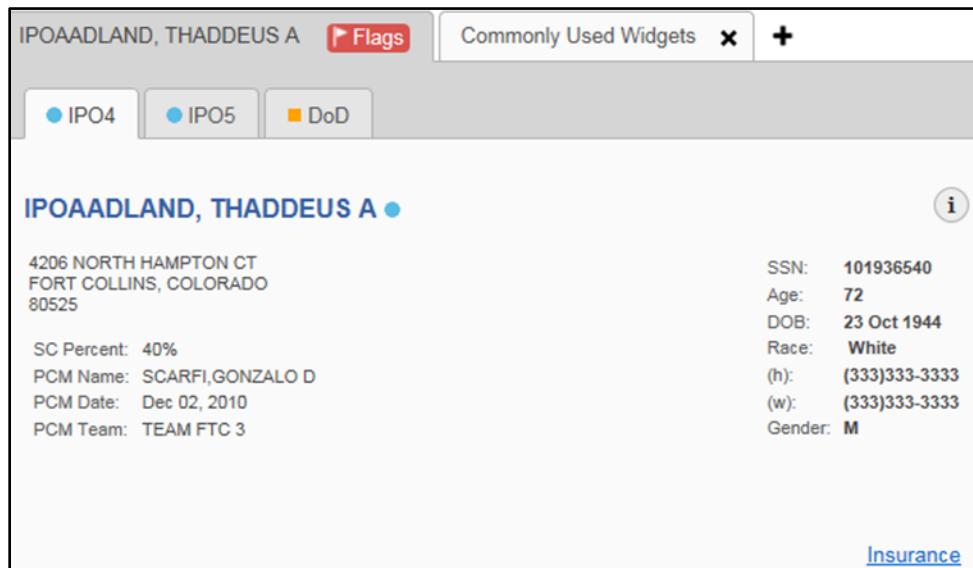
## 5. Widget Functionality

The following subsections detail the functionality in a sampling of the widgets available in JLV.

### 5.1. Patient Demographics Widget

The **Patient Demographics** widget displays a summary of the patient's non-clinical, personal data. The widget appears in the upper left section of the **Patient Portal** (Figure 55). The tabs above the patient's name provide a demographics summary for each site (VA, DoD, or VHIE) the patient has visited.

Figure 55: Patient Demographics Widget



The **Patient Demographics** widget provides additional functionality and displays:

- Clicking the patient's name opens details in a standalone window
- Clicking a **Connection Status** icon opens the connection status details in a separate window
- Clicking the **Flags** icon above the tabs in the widget opens clinical flag details in a new window

A **warning icon** displayed on one or more tabs within the **Demographics** widget is an indication that the patient is not registered at that VA site or DoD facility.

#### 5.1.1. Patient Flags and Alerts

If the patient has one or more clinical warnings, alerts, or flags in their record from VA and DoD sites, the **Flags** icon is displayed next to the **Patient Name** tab, above the **Demographics** widget, on the **Patient Portal** (Figure 56).

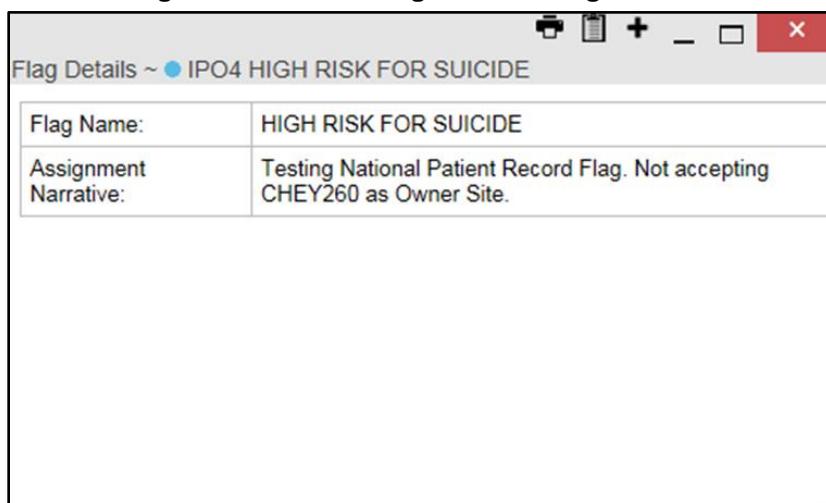
The Patient Flags and Alerts details window opens and displays by default when the **Patient Portal** opens, if there are warnings associated with the selected patient.

**Figure 56: Patient Flags Indicator**



Click the **Flags** icon to open the **Patient Flags and Postings** details window ([Figure 57](#)). The window displays a list of alerts and flags within the patient's record. If the patient's record does not contain any clinical warnings, the **Flags** icon is not displayed.

**Figure 57: Patient Flags and Postings Details**



### 5.1.2. Race Data Terminology Normalization

Race data from VA and DoD sources in the **Patient Demographics** widget is normalized. Hovering over the **Race** information displays the standardized name and code for the race classification, normalized to the Centers for Disease Control (CDC) standard ([Figure 58](#)).

**Figure 58: Standardized Race Data**

The screenshot shows a patient profile for IPOAADLAND, THADDEUS A. At the top, there are links for Patient Search, Provider Portal, and Patient Portal. Below the header, there are tabs for IPO4 (blue circle), IPO5 (blue circle), and DoD (orange square). A 'Flags' button is also present. A 'Commonly Used Widgets' section includes an 'i' icon. Below the tabs, the patient's name is displayed. To the left is the address: 4206 NORTH HAMPTON CT, FORT COLLINS, COLORADO 80525. To the right are demographic details: SSN: 101936540, Age: 72, DOB: 23 Oct 1944, Race: White, (h): (333)333-3333, (w): (333)333-3333, Gender: M. A yellow box highlights a box containing 'National Standard CDC Race' information: Standardized Name: White, Standardized Code: 2106-3. At the bottom right is a link labeled 'Insurance'.

### 5.1.3. Demographics from Community Partners

When users enable the **Include Community Data** setting and VHIE patient data is displayed, the **Patient Demographics** widget displays color-coded information.

- The blue circle represents data retrieved from a VA system
- The orange square represents data retrieved from a DoD system
- The purple hexagon represents data retrieved from VHIE sources

**Please Note:** VHA users can see the **Include Community Data** option, but it is not yet active. It will be enabled in a future release.

### 5.1.4. Viewing Third-Party Insurance Information

Third-party payers and insurance information is available from the **Patient Demographics** widget. Click the [Insurance](#) link in the **Demographics** widget. A new window ([Figure 59](#)) opens with the following insurance information:

- Health Plan Type
- Health Plan Name
- Standardized Insurance Type
- Plan Effective Date
- Plan Expiration Date
- Site
- Group Number
- Member ID
- Subscriber ID
- Subscriber Date of Birth
- Subscriber's Relationship to Insurer
- Health Plan Mailing Address
- Health Plan Contact Information

**Figure 59: Insurance Information**

Health Plan Type	Health Plan Name	Standardized Insurance Type	Plan Effective Date	Plan Expiration Date	Site	Group Number	Member ID
MEDICARE (M)	MEDICARE (WNR)	Medicare Primary	Sep 01, 2009		IPO4	GRP NUM 9232	
MEDICARE (M)	MEDICARE (WNR)	Medicare Primary	Sep 01, 2009		IPO4	GRP NUM 9303	
MEDIGAP PLAN C	MUTUAL OF OMAHA	Other	Sep 01, 2009		IPO4	GRP NUM 13129	

Use the scroll bar in the window to view the columns not seen within the default window size.

The data in the **Standardized Insurance Type** column is normalized to the X12 Health Insurance Type standard. Hovering over entries in this column display the standardized name and code for the insurance type.

## 5.2. Documents Widget

The **Documents**  widget ([Figure 60](#)) includes documents from multiple clinical domains, including radiology reports (exams), progress notes, outpatient encounters, consult encounters, discharge summaries (inpatient notes), questionnaires, and Health Artifact and Image Management Solution (HAIMS) records. HAIMS records retrieved by JLV include scanned paper records, imported paper records, scanned non-radiology images, and imported non-radiology images, displayed in chronological order by the document date.

**Figure 60: Documents Widget, Minimized View**

Documents (500) Filtered date range: 1/14/00 - 3/27/18				
Date	Description	Provider	Image	Site
Feb 01, 2018	BONE DENSITY AXIAL-DXA			IPO5
Feb 01, 2018	CHEST 2 VIEWS PA&LAT			IPO5
Feb 06, 2018	Cardiology			IPO5
Feb 06, 2018	Dental Consult			IPO5
Sep 09, 2003	<a href="#">ULTRASOUND-CAROTID</a>			IPO4
Feb 18, 2005	<a href="#">CT NECK SOFT TISSUE W/CO NT</a>			IPO4

◀
1
2
3
4
5
6
▶
Displaying 1-25 of 500
[More >>](#)

### 5.2.1. Documents Widget Data

The minimized view of the **Documents** widget displays the following information:

- Date
- Description
- Provider
- Image
- Site

Outpatient encounter records displayed in the **Documents** widget may have a details link enabled in the **Date** column. Where available, click the link to open a **Details** window for records of this type.

The **Description** column displays the document title, where available. Click a hyperlinked entry in the **Description** column in either the minimized or expanded view of the widget to open the document.

A **camera** icon in the **Image** column of the **Documents** widget indicates that one or more images are associated with that record. Clicking the **camera** icon opens the VistA Imaging Viewer in a standalone window and displays the associated image(s).

Click **More >>** in the minimized view of the **Documents** widget to open the expanded view ([Figure 61](#)). Information in expanded view includes:

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>• Date</li> <li>• Description</li> <li>• Standardized Description</li> <li>• Provider</li> <li>• Provider Specialty</li> </ul> | <ul style="list-style-type: none"> <li>• Location</li> <li>• Status</li> <li>• Image</li> <li>• Source System</li> <li>• Site</li> </ul> |
|---|--|

**Figure 61: Documents Widget, Expanded View**

The screenshot shows the 'Documents' widget in expanded view. At the top, there's a toolbar with icons for search, print, and refresh, followed by a red close button. Below the toolbar, a message says 'If the information you expect does not appear, expand the date range.' There are date filters for 'Start date' (01/14/2000) and 'End date' (03/27/2018), with an 'Apply' button. Below these are several filter dropdowns: 'Filter by Description', 'Filter by Standardized Description', 'Filter by Provider Specialty', 'Filter by Location', 'Filter by Source System', and 'Filter by Site'. A link 'Remove All Filters' is also present. On the right side of the header, there's a 'Close Filter' button.

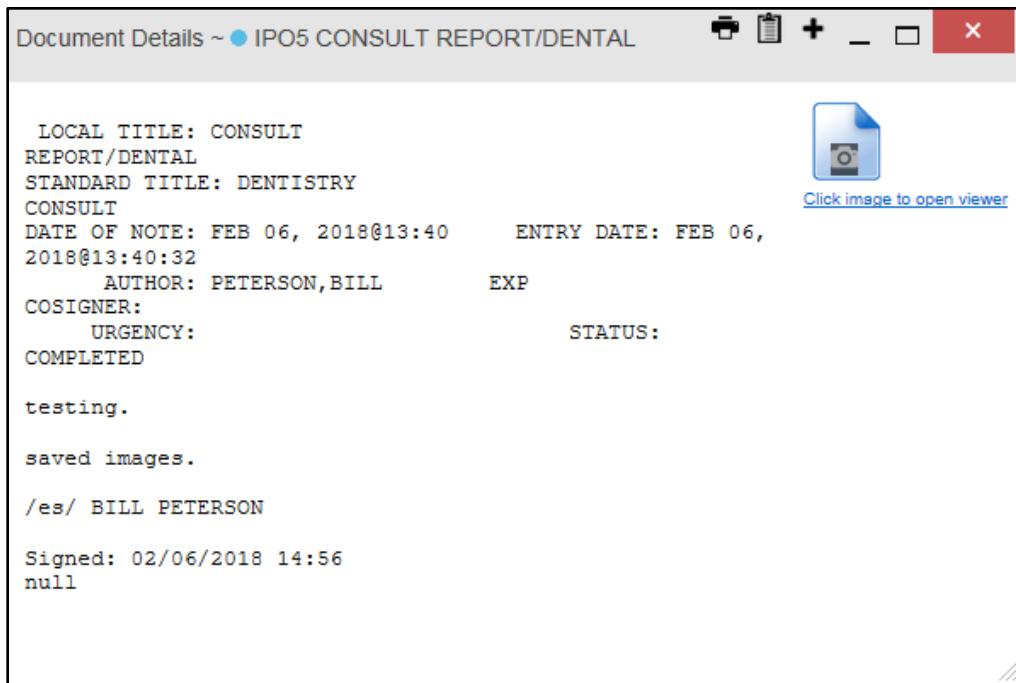
Date	Description	Standardized Description	Provider	Provider...	Location	Status	Inv.	Source System	Site
Feb 06, 2018	Dental Consult							VistA	IPO 5
Feb 06, 2018	Cardiology							VistA	IPO 5
Feb 01, 2018	CHEST 2 VIEWS PA& LAT							VistA	IPO 5
Feb 01, 2018	BONE DENSITY AXIA L-DXA							VistA	IPO 5
Feb 18, 2005	<u>CT NECK SOFT TISSUE W/CONT</u>	COMPUTED TOMOGRAPHY, SOFT TISSUE NECK; WITH CONTRAST MATERIAL(S)				Verified		VistA	IPO 4
Sep 09, 2003	<u>ULTRASOUND-CAROTID</u>	ULTRASOUND, SOFT TISSUE S OF HEAD AND NECK (EG, THYROID, PARATHYROID, PA				Verified		VistA	IPO 4

At the bottom left, there are navigation arrows and page numbers (1-6). The message 'Displaying 1-25 of 500' is centered at the bottom. On the right, there's a 'Show All' link.

## 5.2.2. Viewing Documents

Click a hyperlinked entry in the **Description** column in either the minimized or expanded view of the **Documents** widget to access additional information for a listed record. Depending on the record type, the additional information may open in either a details window or a separate browser window. [Figure 62](#) displays outpatient encounters details, accessed through the **Documents** widget.

**Figure 62: Details View of a Document**



### 5.2.3. Viewing DoD Sensitive Data

JLV masks the display of sensitive records in the **Documents** widget. The record is masked with the tag **\*\*Sensitive\*\***. A user may view the data, but the action is audited each time the sensitive DoD record is viewed.

After clicking the hyperlink in the **Description** column for a sensitive record, JLV notifies the user that they will be audited. This message is triggered each time a user clicks a sensitive record. After the user selects the purpose of viewing the record and agrees to be audited, the sensitive data appears in **Details** view, but the record remains masked in the minimized and expanded views of the widget.

### 5.2.4. Display and Filter Options

Display and filter options within the **Documents** widget include:

- Click a column title to sort records by that column
  - If a user sorts a column that appears in both minimized and expanded views of the widget, the sort is saved to the user profile, and appears in subsequent JLV sessions
  - If a user sorts a column that is only available in the expanded view of the widget, subsequent JLV sessions display the default widget sort, or the last sort saved to the user profile.
- Use the **Quick Date Range Selector**, or the **Start Date** and **End Date** calendars, to specify the date range of records to be displayed within the widget
  - If the information you expect does not appear in the widget display, use the **Start Date** and **End Date** filter options to expand the date range

- When a date range filter is applied in an open widget, the date range is displayed in the widget header
- Open or close the filter options by clicking the date range in the header
- Click the **Column Settings** icon  on the widget toolbar to show or hide columns within the widget
  - Check/uncheck the column names that appear in the pop-up dialog box, then click **Apply**
- Use the **Filter by Description** dropdown to redraw the widget and show only the records for the selected description(s) (Only available in expanded view)
- Use the **Filter by Standardized Description** dropdown to redraw the widget and show only the records for the selected description(s) (Only available in expanded view)
- Use the **Filter by Provider Specialty** dropdown to redraw the widget and show only the records for the selected provider type(s) (Only available in expanded view)
- Use the **Filter by Location** dropdown to redraw the widget and show only the records for the selected location(s) (Only available in expanded view)
- Use the **Filter by Site** dropdown to redraw the widget to show only the records for the selected site(s)

### 5.2.5. Terminology Normalization

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

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

[Figure 63](#) highlights a document mapped to the LOINC standard. The standardized name and code are displayed in the hover text over the record in the **Description** column.

**Figure 63: Standardized Name and Code–Documents Widget**

Documents (5) Filtered date range: 5/8/17 - 9/5/17					
Date	Description	Provider	Image	Site	
Jul 31, 2017	DENTAL	PETERSON,BILL		IPO4	
Jul 31, 2017	DENTAL	PETERSON,BILL		IPO4	
Jun 23, 2017	ECHOGRAM CHEST B-SCAN			IPO4	
Jun 05, 2017	<b>Current Procedural Terminology (CPT)</b> Standardized Type: ULTRASOUND, CHEST (INCLUDES MEDIASTINUM), REAL TIME WITH IMAGE DOCUMENTATION Standardized Code: 76604	KOTHASREVALLI		IPO4	
Jun 05, 2017		KOTHASREVALLI		IPO4	
Displaying 1-5 of 5				<a href="#">More &gt;&gt;</a>	

## 5.3. Community Health Summaries and Documents - VA

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

### 5.3.1. Community Health Summaries and Documents - VA Widget Data

Data displayed within the Community Health Summaries and Documents - VA widget includes:

- Date
- Document
- Source

The purple hexagon beside entries in the **Source** column denotes the source of the data is outside the VA.

**Figure 64: Community Health Summaries and Documents - VA, Minimized View**

Community Health Summaries and Documents - VA (12)		
Date	Document	Source
Apr 27, 2017	<a href="#">ULT LEG UNI VENOUS DUPL EX</a>	•
Apr 27, 2017	<a href="#">ULT LEG UNI VENOUS DUPL EX</a>	•
Oct 25, 2017	<a href="#">Summarization of Episode Note</a>	•
Oct 25, 2017	<a href="#">Summarization of Episode Note</a>	•
Oct 25, 2017	<a href="#">Summarization of Episode Note</a>	•
Oct 25, 2017	<a href="#">Summarization of Episode Note</a>	•

The **Site List** icon  on the toolbar in the **Community Health Summaries and Documents - VA** widget ([Figure 64](#)) generates a list of community sites where the patient has been seen.

Click the **Site List** icon  to open the full list of community sites where the patient has been seen. The site list content is gathered from the widget's **Source** column and the sites where the patient was seen, but no document was generated. Click **Close Site List** to remove the full site list from the widget display.

### 5.3.2. Viewing VA Community Health Summary Documents

The **Community and Health Summaries and Documents - VA** widget is rendered only in minimized view. Instead of an expanded view, the selected document opens in a new browser window ([Figure 65](#)).

[Figure 64](#) shows health summary records available from the **Document** column in the **Community Health Summaries and Documents - VA** widget. Clicking a hyperlinked entry in the **Document** column opens the document in a separate browser tab ([Figure 65](#)).



Multiple documents can be opened in separate browser tabs for simultaneous viewing and printing.

**Figure 65: Community Health Document**

JLV undefined ULT LEG UNI VENOUS DUPLEX - Internet Explorer

**Susquehanna Health System**

**Imaging**

**Created On:** April 27, 2017

<b>Patient:</b>	NWHINFIVE NWHINZZZTESTPATIENT 1500 TEST STREET HELENA, AL, 35080 <b>tel:</b> PATIENT PHONE MISSING	<b>Patient ID:</b> 700002
<b>Birthdate:</b>	January 5, 1985	<b>Sex:</b> M
<b>Source:</b>	Susquehanna Health System Author: STELTZ, MICHAEL	

**Table of Contents**

**Attached File**

EXAM: (MUS 1553) ULT LEG UNI VENOUS DUPLEX - LEFT -Accession #: 6749809  
DATE AND TIME EXAM COMPLETED: Apr 27 2017 1:45PM  
REASON FOR EXAM: pain  
\*\*\*\*\*  
Venous Doppler of the leftlower extremity.  
Indication: Hard lump just above the knee.  
Comparison: None  
TECHNIQUE: Gray-scale, pulsed Doppler and color Doppler images.  
INTERPRETATION: No evidence of deep venous thrombus within the left lower extremity.  
At the area of interest ultrasound showed a small 3 x 3 mm cystic area in the subcutaneous zone. Nonspecific but suspicious for benign sebaceous cyst.  
Also small popliteal cyst, 3 x 1 cm.

## 5.4. Military Health System (MHS) GENESIS Widget

The MHS GENESIS widget displays the documents in patient records from the MHS GENESIS system. The information is displayed in reverse chronological order by date.

### 5.4.1. MHS GENESIS Widget Data

The minimized view of the MHS GENESIS widget includes the following orders information:

- Date
- Document Title
- Document Type
- Site

[Figure 66](#) highlights the MHS GENESIS widget in minimized view. There is no expanded view for the widget; instead, the CCDA document selected opens in a new browser window ([Figure 67](#)).

Medical CCDs, Dental CCDs, and aggregate CCDs with blank entries in the **Date** column for the record appear first in the widget by default.

**Figure 66: MHS GENESIS Widget**

MHS GENESIS (5)				
Date	Document Title	Document Type	Site	
	<a href="#">Patient Continuity of Care Document</a>	Summarization of episode note	DoD	
	<a href="#">Micro, Anatomic Path, Rad and Dental Notes</a>	Summarization of episode note	DoD	
Jan 31, 2017	<a href="#">Dental Summary</a>	Transition of Care - Referral Summary	DoD	
Jan 30, 2017	<a href="#">History and Physical</a>	Hosp Admit H&P note	DoD	
Jan 30, 2017	<a href="#">Advance Directive</a>	Advance directives	DoD	

#### **5.4.2. Viewing MHS GENESIS Documents**

Click a hyperlink in the **Document** column in either view of the MHS GENESIS widget to display a Consolidated Clinical Document Architecture (CCDA) document ([Figure 67](#)) in a new browser window.

**Figure 67: CCDA Document**

The screenshot shows a CCDA (Continuity of Care Document) in Internet Explorer. The title bar reads "JLV Patient Continuity of Care Document - Internet Explorer". The main content area is titled "MB Military Baseline Medical Center". A "Table of Contents" section includes links for Patient Information, Encounters, Vital Signs, Problem, Allergies, Medications, Results, Immunizations, Procedures, Social History, Functional Status, Assessment and Plan, Hospital Discharge Instructions, Healthcare Providers, and Contact Information. The "Patient Information" section contains the following data:

Patient Information	
Address	Primary Home: 1234 Howard St La Jolla, CA 92038- Tel: (760)222-5555
Marital status	
Religious Affiliation	
Race	Black or African American
Ethnicity	Not Hispanic or Latino
Language(s)	
Preferred Language	

The "Encounters" section lists:

- 2/17/17
- FC Fairchild Clinics 9 (9 ) -
- 2/17/17

## 6. Troubleshooting

The following subsections provide information about troubleshooting common errors in JLV.

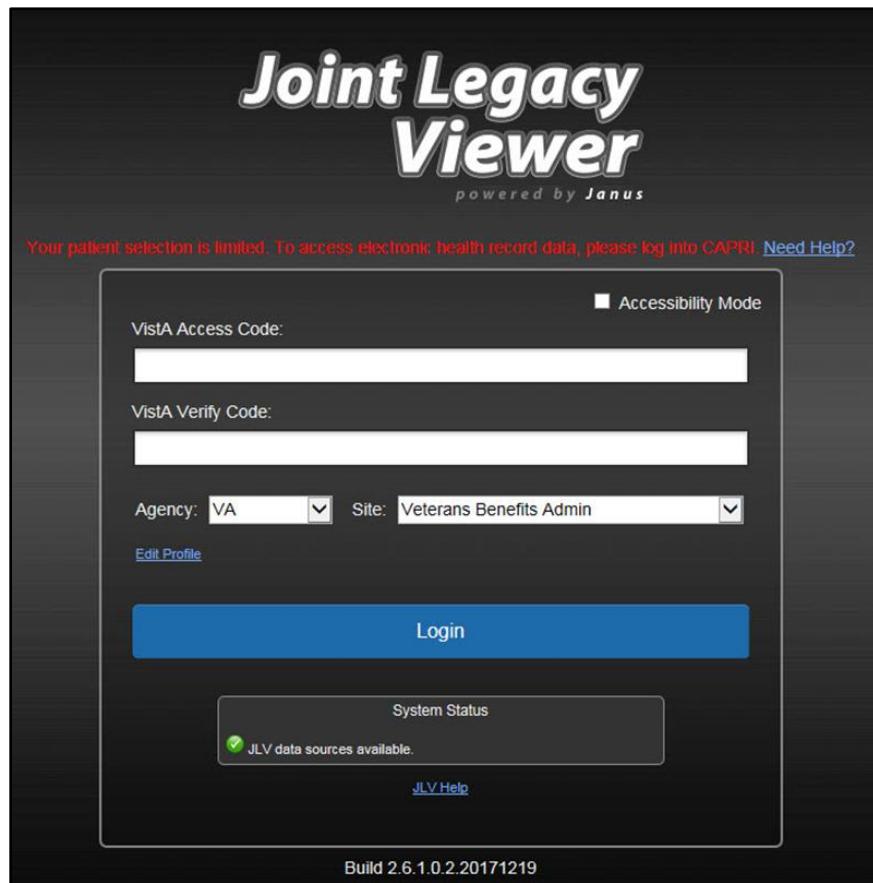
For how to information within JLV, please see online help. To see JLV training videos and access additional JLV training materials, please visit [JLV Resources](#).

### 6.1. Special Instructions for Error Correction

JLV utilizes access control and authentication services to limit access to registered, authorized users. When enabled, JLV validates a user against information retrieved from their Smart Card. If you are having trouble logging in to JLV, and have used the correct URL for your agency, please review the following before contacting the ESD:

Users with any CAPRI patient selection restrictions will *not* be able to log in JLV. Instead, they will see this message on the JLV Login page:

Figure 68: Login Error - CAPRI Patient Selection Restrictions



VHA users:

- Have accessed JLV using the VHA URL (<https://jlv.med.va.gov/JLV>)
- Have entered their existing CPRS Access and Verify codes correctly in the fields on the JLV Login page

- Have selected a site from the **Site** dropdown list on the JLV Login page (Most users must specify the individual facility name or their parent healthcare system name)

VBA users:

- Have accessed JLV using the VBA URL ([https://jlv.med.va.gov/JLV\\_Claims](https://jlv.med.va.gov/JLV_Claims))
- Have entered their existing CAPRI Access and Verify codes correctly in the fields on the JLV Login page

### 6.1.1. Login Page Error Messages

Troubleshooting steps for error messages received at the login page are provided in [Table 6](#).

**Table 6: Error Messages and Resolution Steps**

Error Message	Resolution Steps
Access denied. You are not an authorized user	<p><b>WHAT?</b> You see the error message <i>Access Denied. You are not an authorized User.</i></p> <p><b>WHY?</b> There is a PIV card processing problem; the wrong security or an invalid security certificate was selected; or you are not an authorized user.</p> <p><b>FIX IT:</b></p> <ol style="list-style-type: none"> <li>1) Close your browser window</li> <li>2) Reinsert your PIV card and relaunch JLV</li> <li>3) Select a certificate that is not expired, and specifies <i>Issued by: Veterans Affairs CA B1</i></li> <li>4) If unsuccessful, contact the ESD</li> </ol>
Could not save User Profile	<p><b>WHAT?</b> You receive the error message <i>Could not save User Profile.</i></p> <p><b>WHY?</b> The error occurred during PIV authentication. It is typically a PIV card processing problem, or the wrong security certificate is chosen.</p> <p><b>FIX IT:</b></p> <ol style="list-style-type: none"> <li>1) Close your browser window</li> <li>2) Reinsert your PIV card and relaunch JLV</li> <li>3) Select a certificate that is not expired, and specifies <i>Issued by: Veterans Affairs CA B1</i></li> <li>4.) If unsuccessful, close all open IE windows/tabs, then open IE and try JLV again</li> </ol>
Not a valid ACCESS/VERIFY CODE pair	<p><b>WHAT?</b> You see the error message <i>Not a valid ACCESS CODE/VERIFY CODE pair</i> error at the login screen.</p> <p><b>WHY?</b> 1) JLV could not match your Access and Verify codes to the site selected in the dropdown, or 2) A username and password were entered instead of Access/Verify codes.</p> <p><b>FIX IT:</b></p> <ol style="list-style-type: none"> <li>1) VHA users must select the parent VistA host site for their facility</li> <li>2) Reenter your Access and Verify codes (CAPRI codes for VBA users, CPRS codes for VHA users)</li> </ol>
Page cannot be displayed	<p><b>WHAT?</b> You receive a <i>Page cannot be displayed</i> error when launching JLV.</p> <p><b>WHY?</b> The JLV URL requires certain IE settings.</p> <p><b>FIX IT:</b></p> <ol style="list-style-type: none"> <li>1) Click the Tools menu (press ALT+X) in IE</li> </ol>

Error Message	Resolution Steps
	<p>2) Select Internet Options      3) When the dialog box opens, click the <b>Advanced</b> tab      4) Scroll down in the list until you see the Secure Sockets Layer (SSL) 2.0 setting, and ensure it is NOT checked      5) Ensure that the Transport Layer Security (TLS) 1.0, 1.1 and 1.2 settings ARE checked      5) Click <b>OK</b> to close the dialog box, then relaunch JLV (The page should load)</p>
Smart Card required	<p><b>WHAT?</b> You see the error message <i>Smart Card Required</i>.  <b>WHY?</b> Your Smart Card was not read by Windows Security and JLV before opening the JLV URL.  <b>FIX IT:</b></p> <p>1) Close all browser sessions and browser-based applications      2) Reinsert your PIV card, and relaunch the JLV URL      3) If unsuccessful, close all open IE windows/tabs, then Open IE and try JLV again</p>
VERIFY CODE must be changed before continued use	<p><b>WHAT?</b> You receive the message <i>VERIFY CODE must be changed before continued use</i> at the login screen.  <b>WHY?</b> Your CPRS or CAPRI VERIFY CODE has expired.  <b>FIX IT:</b></p> <p>1) Open CPRS, VistA, or CAPRI (VBA users)      2) Select the <b>Change Verify Code</b> checkbox on the sign-on dialog before clicking <b>OK</b>      3) You will be prompted to create a new Verify code      4) Once your Verify code has been changed for CPRS or CAPRI, relaunch JLV and the new code will be recognized immediately</p>
The JLV button in CPRS does nothing	<p><b>WHAT?</b> Clicking the JLV button in CPRS does not open JLV.  <b>WHY?</b> You are likely using Google Chrome as your default browser.  <b>FIX IT:</b></p> <p>1) Click <b>Start</b> menu, then select <b>Default Programs</b> in the right pane      2) Click <i>Set your default programs</i>      3) Click <b>Internet Explorer</b> in the list, then click <i>Set this program as default</i>.</p>

### 6.1.2. System Error Messages

[Table 7](#) summarizes system messages that may be presented to JLV users.

**Table 7: System Error Messages**

Message	Description
<i>No Message displays, but behavior occurs:</i> The browser window does not allow the user to scroll to widgets, or access the JLV icons on the portal pages.	Access JLV using IE 11. Use a monitor with a minimum screen resolution of 1024 x 768. Set the browser zoom feature to 100%. If browser display issues continue, log out of JLV, close the browser window, open a new browser window, and log in to JLV again.
Warning: An error occurred while attempting to retrieve VistA Imaging Viewer URL.	Either VistA Data Service or VistA Imaging Exchange is offline, and JLV is unable to retrieve the necessary data

Message	Description
	object to launch a VistA Imaging Viewer instance within JLV.
MVI Message: There are no patients found using the current parameters.	No patient records were found using the information entered in the Patient Search dialog box. Reenter patient identifiers in the Patient Search dialog box fields after verifying the accuracy of the information
MVI Error: Patient not found with search elements entered, please provide additional patient identifying information and search again.	No unique patient is found with the identifiers used in the search. Click <b>OK</b> to return to the Patient Search window and provide additional patient identifiers, like the full first name or DOB.
MVI Error: Your query yields too many results. Please modify your search parameters to narrow the search.	JLV adheres to VA guidelines and blocks search results when a search request yields more than 10 patients. Modify the information in the Patient Search dialog box using additional patient identifiers to reduce the number of results.
MVI Error: Application Reject. There was an error attempting to process your query. Please modify your search parameters and try again.	There may be one or more errors in the Patient Search dialog fields. Validate the patient identifiers and try the search again. If problems persist, there may be an error between MVI and the Defense Enrollment Eligibility Reporting System (DEERS).
You do not have authorization to view this record. Security regulations prohibit computer access to your own medical record.	VA security regulations prevent a user from accessing their own medical records.
You do not have authorization to view this record. Your SSN is missing from the NEW PERSON file. Contact your ACP Coordinator.	Per VA policy, JLV does not allow access to patient records if the JLV user's SSN is not in their VistA profile.
An error occurred while attempting to retrieve the document.	Occurs when something goes wrong when JLV tries to retrieve a selected document.
An error occurred while attempting to display the document.	Occurs when JLV tries to receive a document, but has trouble converting the document to a viewable format.
Your patient selection is limited. To access electronic health record data, please log into CAPRI.	Some VBA users have patient or site restrictions attached to their profile. Log into CAPRI to view patient records.
Connection Status alert or error displayed in the <b>Community Health Summaries and Documents - VA</b> widget: One or more data sources could not be connected; some entries will not appear. <i>or</i> Error: DAS Query failure. HTTP error.	These messages appear when the VA VHIE service is not available. If either message persists for more than 5 minutes, contact support to report the connection error.
Error displayed in <b>Community Health Summaries and Documents – VA</b> widget: Connection Error – No Data	JLV was unable to retrieve data from eHX.

Message	Description
<p>Errors displayed in the <b>Community Health Summaries and Documents - VA</b> widget:</p> <p>An error occurred while attempting to retrieve the document.</p> <p>or</p> <p>An error occurred while attempting to display the document.</p>	<p>These error messages may appear when a user attempts to view a document, but JLV is either unable to retrieve it, or is unable to convert the document to HTML.</p>

### 6.1.3. VA VHIE Server Error Message

[Table 8](#) details an error that may be presented to JLV users, related to the display of VA VHIE data.

**Table 8: Community Health Summaries and Documents - VA Widget Error Message**

Message	Description
An error occurred while attempting to retrieve the document. <i>or</i> An error occurred while attempting to display the document.	These messages may occur when you try to view a - VA widget, but JLV is either unable to retrieve the document, or JLV is unable to convert the document to HTML.

## 7. Acronyms and Abbreviations

[Table 9](#) lists the acronyms and abbreviations used throughout this document, and their descriptions.

**Table 9: Acronyms and Abbreviations**

Acronym	Description
CAPRI	Compensation and Pension Record Interchange
CCDA	Consolidated Clinical Document Architecture
CCOW	Clinical Context Object Workgroup
CDC	Centers for Disease Control
CPRS	Computerized Patient Record System
DEERS	Defense Enrollment Eligibility Reporting System
DOB	Date of Birth
DoD	Department of Defense
EDIPI	Electronic Data Interchange Personal Identifier
EHR	Electronic Health Records
eHX	eHealth Exchange
ESD	Enterprise Service Desk
GUI	Graphical User Interface
HAIMS	Healthcare Artifact and Image Management Solution
HL7	Health Level 7
ID	Identification
IE	Internet Explorer
IEN	Internal Entry Number
IP	Internet Protocol
JLV	Joint Legacy Viewer
LOINC	Logical Observation Identifiers Names and Codes
MHS	Military Health System
MI	Middle Initial
MVI	Master Veteran Index
NUCC	National Uniform Claim Committee
OIT	Office of Information and Technology
PDWS	Patient Discovery Web Service
PIV	Personal Identity Verification
SSL	Secure Sockets Layer
SSN	Social Security Number
TLS	Transport Layer Security
UI	User Interface
URL	Uniform Resource Locator
VA	Department of Veterans Affairs

<b>Acronym</b>	<b>Description</b>
VBA	Veterans Benefits Administration
VHA	Veterans Health Administration
VistA	Veterans Health Information Systems and Technology Architecture
VHIE	Virtual Lifetime Electronic Record