

Veterans Health Information Exchange (VHIE) Portal

Build 3.4 VHIE Portal User Guide



Version 3.2
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Department of Veterans Affairs
Office of Information and Technology (OIT)

Revision History

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

Date	Revision	Description	Author
03/2020	3.2	Added Section 4.1 to let ROI Operators know the appropriate VHIE Role to use when requesting access to the VHIE Portal.	VHIE Agile Development
03/2020	3.1	Updated Sections 4.2.1 and 4.2.2 with updated screenshots to reflect updated VA Forms for Opt-Out and Re-participation. Updated Section 4.14.3 with updated screenshot to reflect the most recent software version.	VHIE Agile Development
03/2020	3.0	Updated Section 3 to include the Production URL. Removed/updated sub-sections under Sections 4.11 and 4.12 regarding the reports that are hidden from the GUI for the current release (Deceased Veteran Detailed, Expiring Consent Detailed, Deceased Veteran Summary, Disclosures Summary).	VHIE Agile Development
12/2019	2.9	Update Section 4.1 Patient Search to include expected response for loading an Inactive Patient for Build 3.1.	VHIE Agile Development
09/2019	2.8	Updated Section 5.1 Special Instructions for Error Correction and updated instructions for exporting to CSV and Save XML throughout the document.	VHIE Agile Development
08/2019	2.7	Updated additional language and labels for tables/figures.	VHIE Agile Development
08/2019	2.6	Updated based on PMO review.	VHIE Agile Development
08/2019	2.5	Updated UIs and content to reflect changes during Build 3.	VHIE Agile Development
06/11/2019	2.4	Updated content, tables, and figures to reflect Build 3 functionalities.	VHIE Agile Development
04/16/2019	2.3	Updated UIs and language throughout to reflect most recent design changes.	VHIE Agile Development
04/05/2019	2.2	Added a note in Section 4.5 to let users know Print functionality is available through the browser.	VHIE Agile Development
03/15/2019	2.1	Added a note under "Generate Documents" to recommend users to allow pop-ups and redirects in the browser's setting for the VHIE Portal.	VHIE Agile Development
02/28/2019	2	Updated content, images, and document text to reflect Mission Act language.	VHIE Agile Development

Date	Revision	Description	Author
01/17/2019	1	Initial Draft	VHIE Agile Development

Artifact Rationale

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

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1. Introduction

The Veterans Health Information Exchange (VHIE) Program was tasked by the Department of Veterans Affairs (VA) to replace the eHealth Exchange (eHX) solution with a Commercial-off-the-Shelf (COTS) product called the HealthShare Enterprise Platform. As part of the enhancement, HealthShare will consume legacy applications that relies on the connection with the eHX Adapter, and in this case, the Veteran Authorization and Preferences (VAP) system. At a high-level, VAP manages a Patient's Consent, also known as the Patient's Participation Preferences (PPP) and the requests for generating CDA-type documents for selected veterans, as well as generate and display HIE and Consent reports. To improve user experience and provide a more streamlined and robust interface, the VAP interface and functionalities will be replaced by a custom-coded interface known, henceforth, as the VHIE Portal.

1.1. Purpose

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

2. System Summary

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

3. Getting Started

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

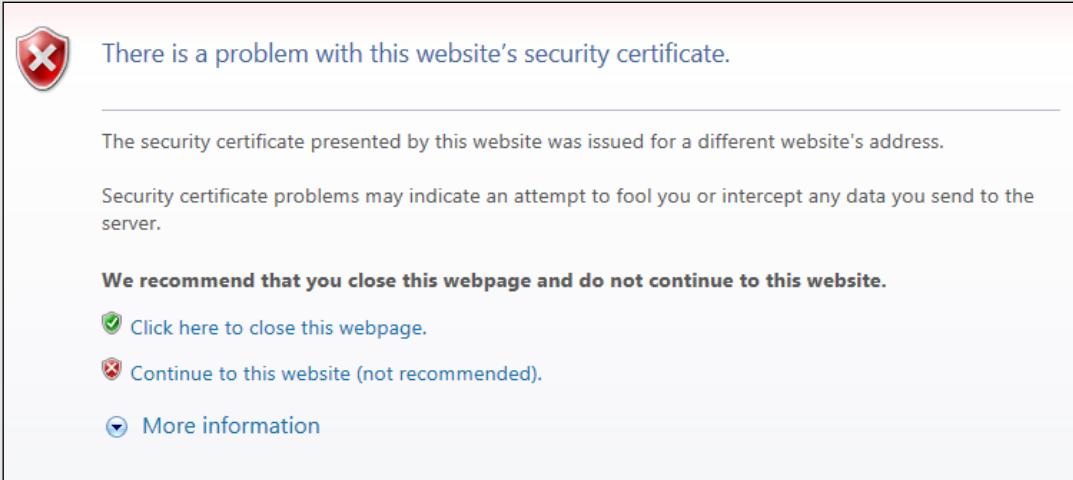
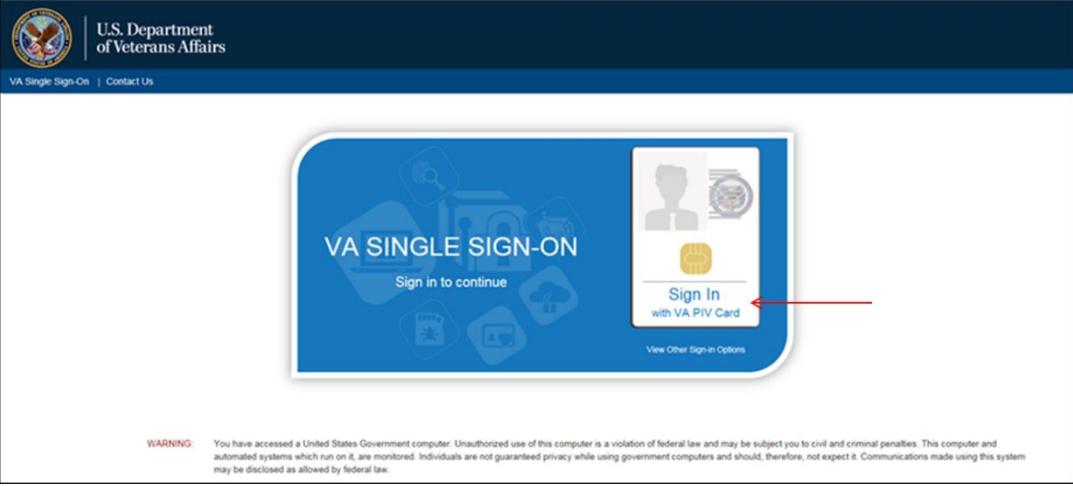
3.1. Log in via SSOi

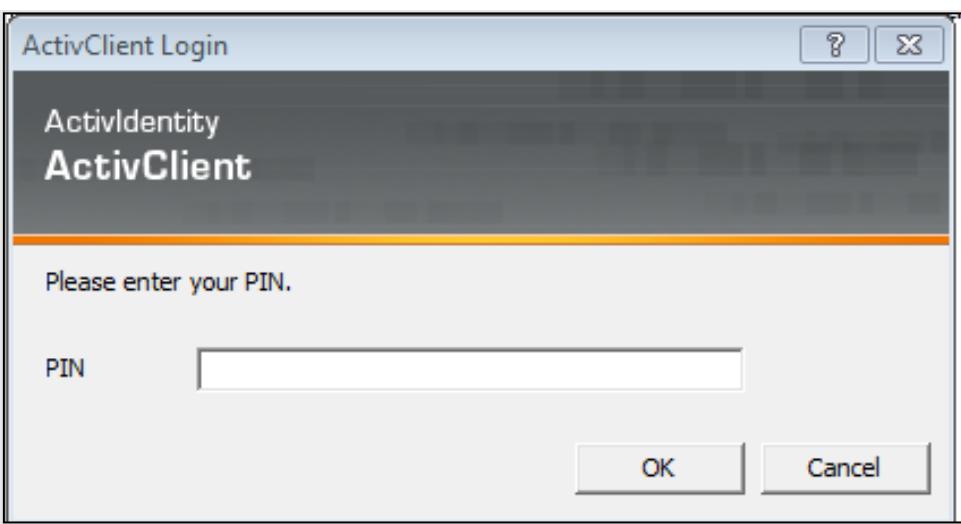
Take the following steps to log in via SSOi:

<https://vhieportal.hsh.va.gov/csp/vhieui/portal/index.csp#/>

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

Table 1: Log in via SSOi

Step	Action
1.	<p>Navigate to the VHIE Portal Login screen at https://vhieportal.hsh.va.gov/csp/vhieuui/portal/index.csp#/.</p> <p>Note: If presented with the website's security certificate error, click on "Continue to this website (not recommended)".</p>  <p>The security certificate presented by this website was issued for a different website's address.</p> <p>Security certificate problems may indicate an attempt to fool you or intercept any data you send to the server.</p> <p>We recommend that you close this webpage and do not continue to this website.</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Click here to close this webpage. <input type="checkbox"/> Continue to this website (not recommended). <input type="checkbox"/> More information
2.	<p>Login using your PIV card.</p>  <p>WARNING: You have accessed a United States Government computer. Unauthorized use of this computer is a violation of federal law and may be subject you to civil and criminal penalties. This computer and automated systems which run on it, are monitored. Individuals are not guaranteed privacy while using government computers and should, therefore, not expect it. Communications made using this system may be disclosed as allowed by federal law.</p>

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

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

3.2. Understanding the Functionalities

The VHIE Portal provides the following functionalities:

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

- Welcome Menu – Set or Update User’s Default Facility
- Welcome Menu – Access User Guide
- Welcome Menu – View System Software Information

3.3. Exit System

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

4. Using the Software

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

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

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

4.1. VHIE Portal Role for ROI Operators

When requesting access, the following Role Name should be entered as the policy group for Release of Information (ROI) Operators.

Table 2: VHIE Portal Role for ROI Operators

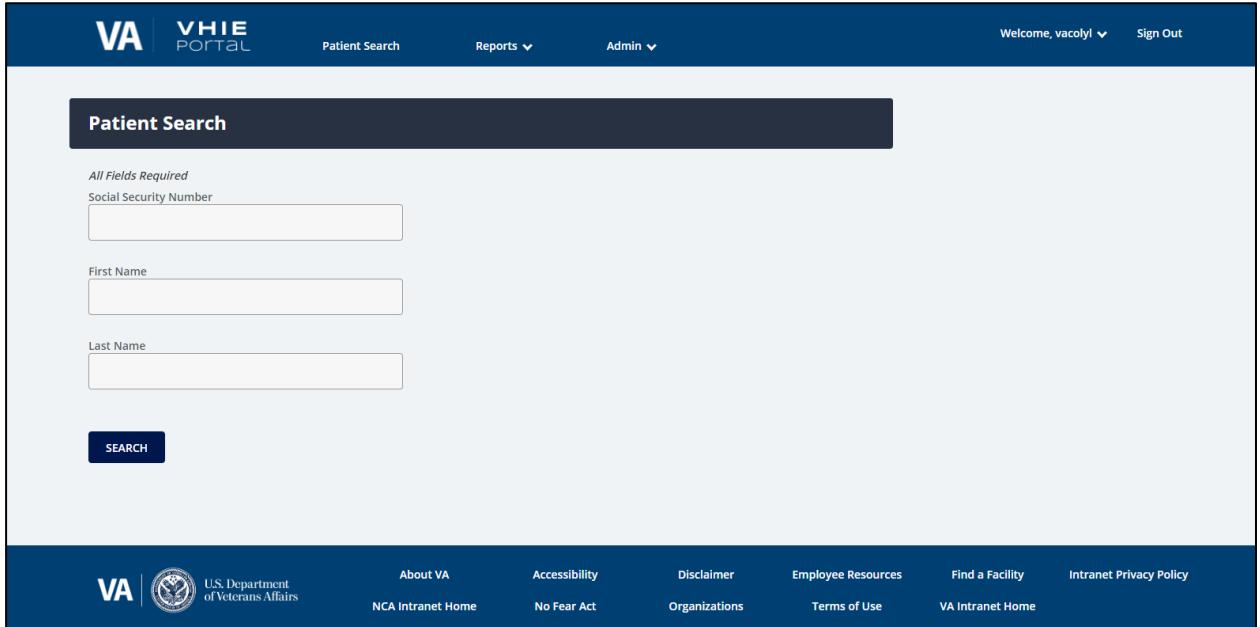
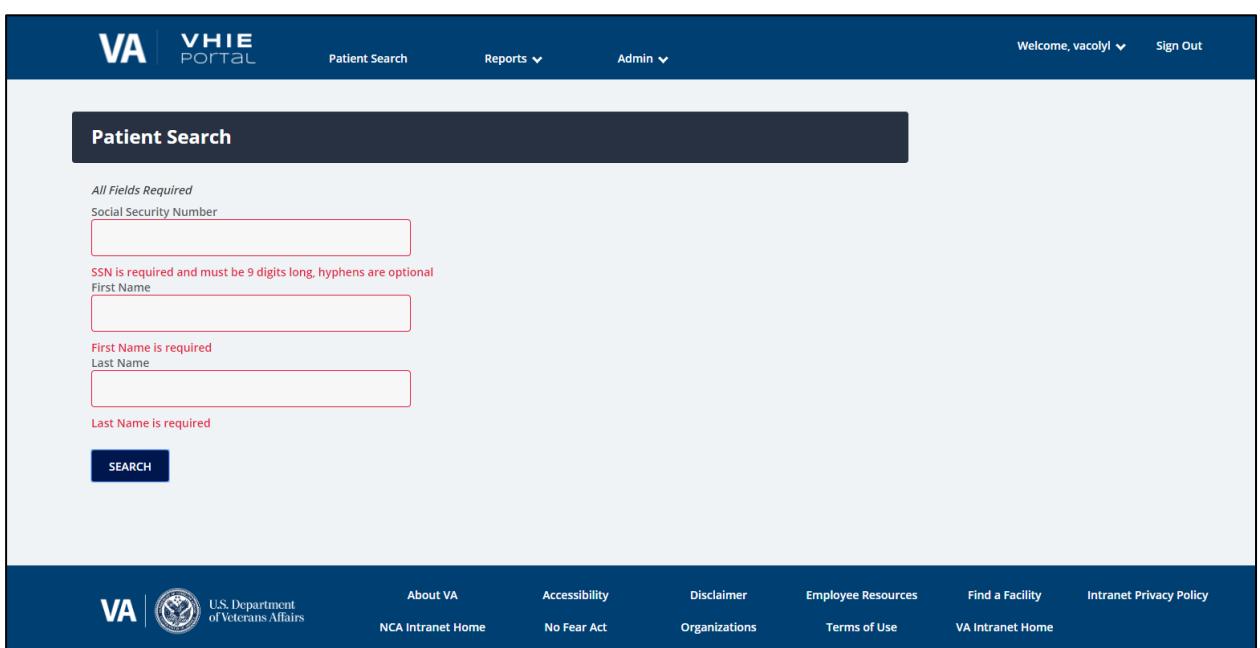
VHIE Portal Roles	
Role Name	Role Description
AAC VDIF VHIE Operators	These users have the same access as the VDIF Reporters, plus can search for patients, view patient details, retrieve CDA Patient Summary documents in HTML or XML, as well as edit eHX consent policies for a Veteran, i.e. set a Veteran to opt-out or re-participate in eHX data-sharing.

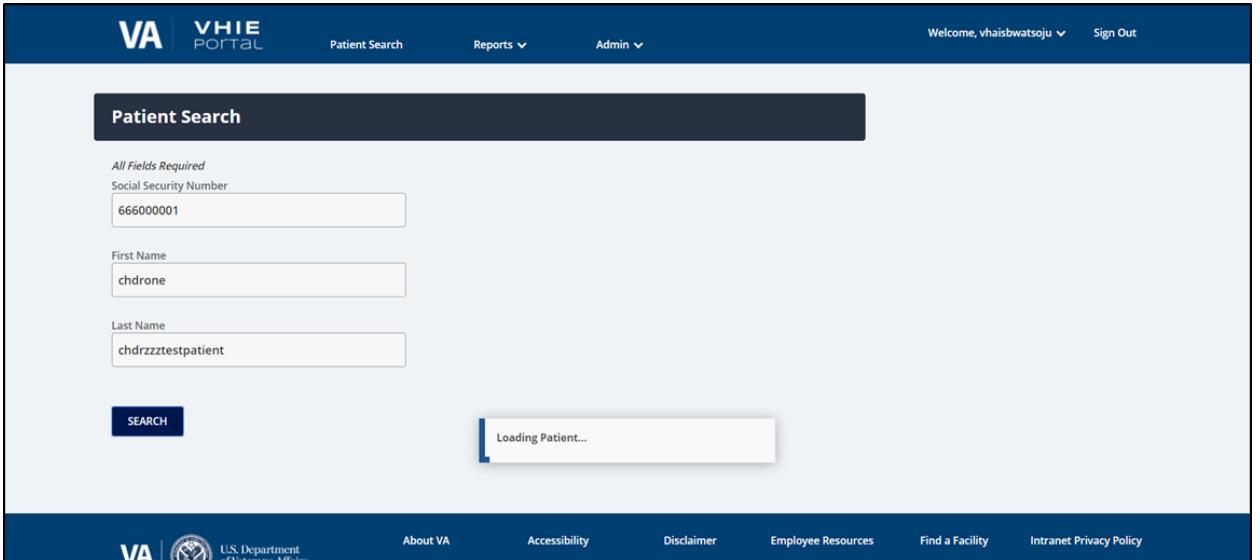
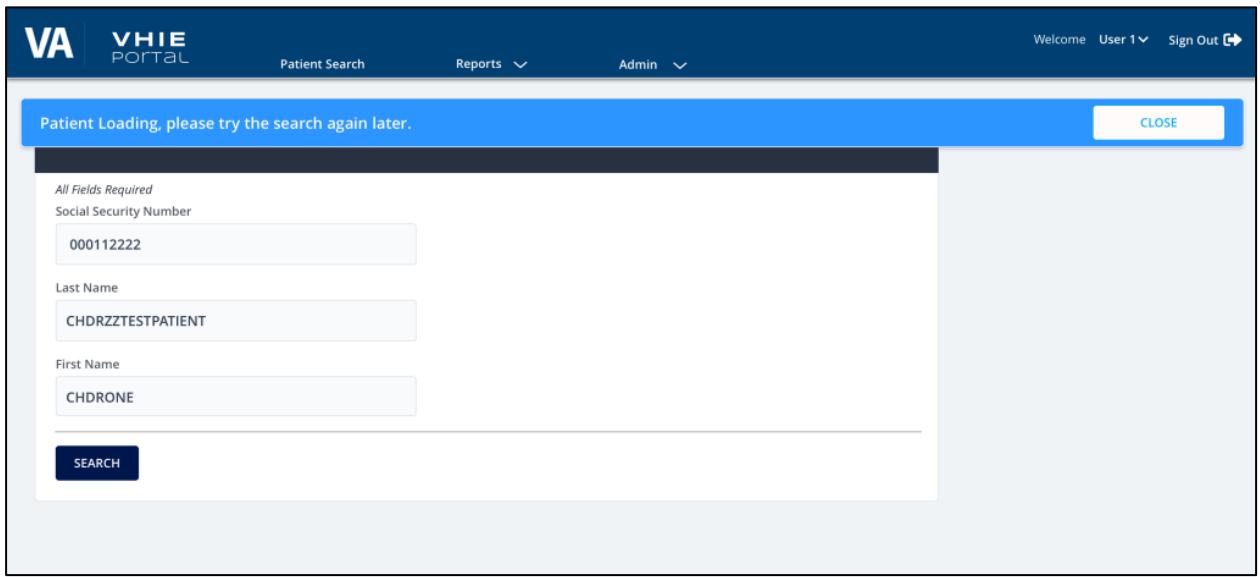
4.2. Patient Search

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

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

Table 3: Patient Search

Step	Action
1.	<p>Complete the SSN, First Name, Last Name fields, then click Search.</p> <p>Note: The SSN, First Name, and Last Name fields are all required fields. SSN field accepts numeric characters with and without dashes (e.g. xxx-xxx-xxxx and xxxxxxxxxxx).</p> 
2.	<p>Form validation is enforced to ensure that users complete each field in the correct format.</p> 

Step	Action
3.	<p>A progress bar will display to indicate that a Patient Search is processing.</p>  <p>The screenshot shows the VHIE Portal Patient Search interface. At the top, there's a header with the VA logo, 'VHIE PORTAL', 'Patient Search', 'Reports', 'Admin', and a 'Welcome' message. Below the header is a dark blue bar labeled 'Patient Search'. Underneath, there are three input fields: 'Social Security Number' containing '666000001', 'First Name' containing 'chdrone', and 'Last Name' containing 'chdrzztestpatient'. A 'SEARCH' button is to the right of the first two fields. To the right of the last field, a progress bar is visible with the text 'Loading Patient...'. At the bottom of the page is a footer with links to 'About VA', 'Accessibility', 'Disclaimer', 'Employee Resources', 'Find a Facility', and 'Intranet Privacy Policy'.</p>
4.	<p>If the Patient's record has not been loaded from the Legacy system, a notification message will display for the user to try the search again later.</p>  <p>The screenshot shows the same VHIE Portal Patient Search interface as above, but with a different outcome. The search parameters are the same: Social Security Number '000112222', Last Name 'CHDRZZTESTPATIENT', and First Name 'CHDRONE'. However, the progress bar is not visible, and instead, a large blue banner at the top of the search form displays the message 'Patient Loading, please try the search again later.' with a 'CLOSE' button. The rest of the page layout is identical to the successful search screenshot.</p>

4.3. Patient Detail Summary

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

Prerequisite:

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

4.3.1. View Patient Demographic Details

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

Figure 1: Patient Demographic Details

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

Consent Status **Comments** **Generate Documents** **Recent Activity** **Accounting of Disclosures** **Facilities**

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

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

OPT-OUT

Dates

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

Display All **Display ▾**

4.3.2. Patient-centric Functions

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

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

Figure 2: Patient-centric Info Tabs

The screenshot shows the VA VHIE Portal interface. At the top, there's a navigation bar with links for Patient Search, Reports, Admin, Welcome, and Sign Out. Below the navigation is a section titled "Patient Detail" containing patient demographic information: Last Name (Nwhinzzztestpatient), First Name (Nwhintwo), MI (M), Gender (Male), Date of Birth (1982/01/02), Multiple (No), SSN (666100002), ICN (1012638925V204624), Address (1200 TEST STREET HELENA, AL 35080), Phone ((989)898-9898), and Preferred Facility (983 CHYSHR).

Below this is a horizontal row of tabs: Consent Status, Comments, Generate Documents, Recent Activity, Accounting of Disclosures, and Facilities. The "Consent Status" tab is highlighted with a red dashed border.

The "Participation" section contains a message stating that the patient has opted-in to share health information. It includes a blue "OPT-OUT" button.

The "Social Security Administration (SSA)" section indicates that the patient has NOT authorized the release of protected health information to the SSA.

A table titled "Dates" lists historical participation preferences:

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

4.4. Consent Status Tab

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

Prerequisite:

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

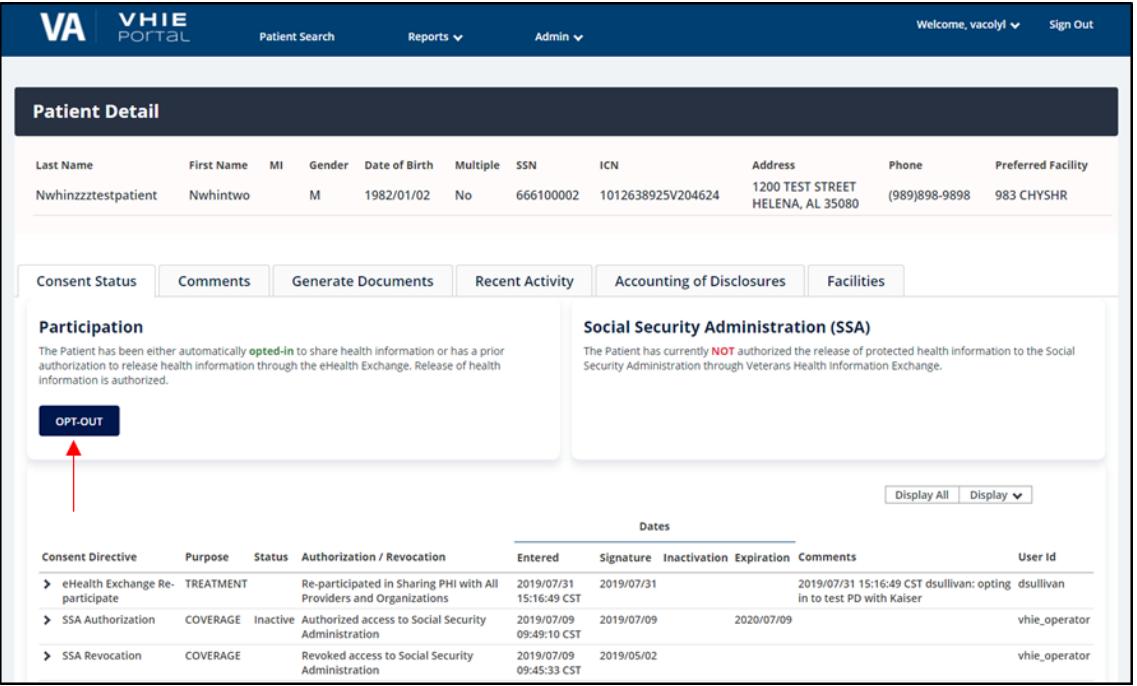
4.4.1. Participation Preference: Opt-Out of Sharing (Not Participating)

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

Prerequisite:

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

Table 4: Patient Opt-out of Sharing

Step	Action																																								
1.	<p>If the veteran is currently participating in sharing, there will be an Opt-Out button under the Participation Section. Select the Opt-Out button to open the participation form and fill out the required information.</p>  <p>The screenshot shows the VHIE Portal interface. At the top, there's a navigation bar with the VA logo, VHIE PORTAL, Patient Search, Reports, Admin, Welcome, vacoly, and Sign Out. Below the navigation is a dark header bar labeled "Patient Detail". Underneath is a table with patient information: Last Name (Nwhinzzztestpatient), First Name (Nwhintwo), MI (M), Gender (M), Date of Birth (1982/01/02), Multiple (No), SSN (666100002), ICN (1012638925V204624), Address (1200 TEST STREET HELENA, AL 35080), Phone ((989)898-9898), and Preferred Facility (983 CHYSHR). Below the table are several buttons: Consent Status, Comments, Generate Documents, Recent Activity, Accounting of Disclosures, and Facilities. The "Recent Activity" section is expanded, showing a "Participation" summary and a "Social Security Administration (SSA)" summary. The "Participation" summary states: "The Patient has been either automatically opted-in to share health information or has a prior authorization to release health information through the eHealth Exchange. Release of health information is authorized." It includes an "OPT-OUT" button, which is highlighted with a red arrow. The "Social Security Administration (SSA)" summary states: "The Patient has currently NOT authorized the release of protected health information to the Social Security Administration through Veterans Health Information Exchange." At the bottom of the "Recent Activity" section is a table titled "Dates" with columns: Consent Directive, Purpose, Status, Authorization / Revocation, Entered, Signature, Inactivation, Expiration, Comments, and User Id. The table contains three rows of data:</p> <table border="1" data-bbox="355 982 1428 1129"> <thead> <tr> <th>Consent Directive</th> <th>Purpose</th> <th>Status</th> <th>Authorization / Revocation</th> <th>Entered</th> <th>Signature</th> <th>Inactivation</th> <th>Expiration</th> <th>Comments</th> <th>User Id</th> </tr> </thead> <tbody> <tr> <td>➤ eHealth Exchange Re-participate</td> <td>TREATMENT</td> <td>Active</td> <td>Re-participated in Sharing PHI with All Providers and Organizations</td> <td>2019/07/31 15:16:49 CST</td> <td></td> <td></td> <td></td> <td>2019/07/31 15:16:49 CST dsullivan: opting in to test PD with Kaiser</td> <td>vhie_operator</td> </tr> <tr> <td>➤ SSA Authorization</td> <td>COVERAGE</td> <td>Inactive</td> <td>Authorized access to Social Security Administration</td> <td>2019/07/09 09:49:10 CST</td> <td></td> <td></td> <td>2020/07/09</td> <td></td> <td>vhie_operator</td> </tr> <tr> <td>➤ SSA Revocation</td> <td>COVERAGE</td> <td>Active</td> <td>Revoked access to Social Security Administration</td> <td>2019/07/09 09:45:33 CST</td> <td></td> <td></td> <td>2019/05/02</td> <td></td> <td>vhie_operator</td> </tr> </tbody> </table>	Consent Directive	Purpose	Status	Authorization / Revocation	Entered	Signature	Inactivation	Expiration	Comments	User Id	➤ eHealth Exchange Re-participate	TREATMENT	Active	Re-participated in Sharing PHI with All Providers and Organizations	2019/07/31 15:16:49 CST				2019/07/31 15:16:49 CST dsullivan: opting in to test PD with Kaiser	vhie_operator	➤ SSA Authorization	COVERAGE	Inactive	Authorized access to Social Security Administration	2019/07/09 09:49:10 CST			2020/07/09		vhie_operator	➤ SSA Revocation	COVERAGE	Active	Revoked access to Social Security Administration	2019/07/09 09:45:33 CST			2019/05/02		vhie_operator
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Step	Action
2.	<p>Complete the required information fields and click the Save button to update the Veteran's participation status.</p> <div data-bbox="319 329 1462 1322"> <h3 data-bbox="352 340 698 382">Opt-Out of Sharing</h3> <p><i>Required Fields</i></p> <p>Authenticating Facility</p> <input data-bbox="352 487 1307 551" type="text"/> <p><input checked="" data-bbox="352 625 393 656" type="checkbox"/> Form Validation for Opt-Out of Sharing Form 10-10164 Received and Validated (Required)</p> <p>Patient Signature Date (YYYYMMDD)</p> <input data-bbox="352 720 1307 783" type="text"/> <p>Participation Update Reason</p> <input data-bbox="352 889 1307 952" type="text"/> <p><i>Optional Field</i></p> <p>Comments</p> <input data-bbox="352 1058 1307 1184" type="text"/> <p>SAVE CANCEL</p> </div>

4.4.2. Participation Preference: Patient Re-participate in Sharing

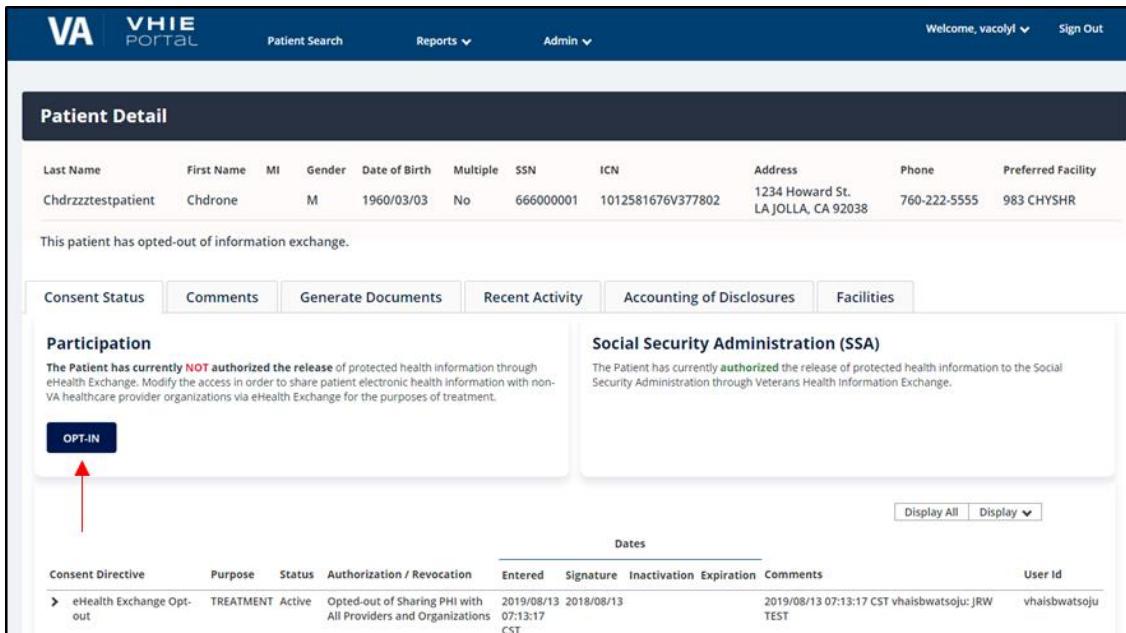
If the Patient is currently opted-out of sharing, a VHIE user can take the following steps to change the Patient's consent status so that the Patient is opted-in for sharing.

Prerequisite:

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

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

Table 5: Patient Re-participate in Sharing

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

Step	Action
2.	<p>Complete the required information fields, then click the Save button to update the Veteran's participation status.</p> <div data-bbox="328 325 1462 1284"> <h3 data-bbox="368 333 780 375">Reparticipate in Sharing</h3> <p><i>Required Fields</i></p> <p>Authenticating Facility</p> <div data-bbox="368 481 1263 544" style="border: 1px solid #ccc; height: 30px;"></div> <p><input type="checkbox"/> Form Validation for Opt-Back-In for Sharing Form 10-10163 Received and Validated (Required)</p> <p>Patient Signature Date (YYYYMMDD)</p> <div data-bbox="368 692 1263 756" style="border: 1px solid #ccc; height: 30px;"></div> <p>Participation Update Reason</p> <p>Reparticipate</p> <div data-bbox="368 967 1263 1146" style="border: 1px solid #ccc; height: 85px;"></div> <p><i>Optional Field</i></p> <p>Comments</p> <div data-bbox="368 1146 1263 1157" style="border: 1px solid #ccc; height: 15px;"></div> <div data-bbox="368 1184 491 1248" style="background-color: #002b36; color: white; padding: 5px 10px; border-radius: 5px; text-align: center;">SAVE</div> <div data-bbox="523 1184 678 1248" style="background-color: #0072bc; color: white; padding: 5px 10px; border-radius: 5px; text-align: center;">CANCEL</div> </div>

4.4.3. Deceased Patient Notification Message

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

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

Prerequisite:

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

Figure 3: Deceased Veteran Notification Message

The screenshot shows the VHIE Portal interface. At the top, there is a navigation bar with the VA logo, 'VHIE PORTAL', 'Patient Search', 'Reports', 'Admin', 'Welcome, vacoly!', and 'Sign Out'. Below the navigation bar, a dark banner displays the message: '2019/06/17: Patient is Deceased, health information may no longer be shared electronically through eHealth Exchange.' The main content area is titled 'Patient Detail' and contains a table with patient information:

Last Name	First Name	MI	Gender	Date of Birth	Multiple	SSN	ICN	Address	Phone	Preferred Facility
Nwhinzzztestpatient	Nwhinsix	M		1986/01/01	No	666100006	1012646102V272429	,	205-111-6666	N/A

Below the table are several buttons: 'Consent Status', 'Comments', 'Generate Documents', 'Recent Activity', 'Accounting of Disclosures', and 'Facilities'. On the left side, under 'Participation', it says '2019/06/17: Patient is Deceased, health information may no longer be shared electronically through eHealth Exchange. Note: Health information for this record may be shared for six (6) months from the date of death (2019/12/17).'. On the right side, under 'Social Security Administration (SSA)', it says 'The Patient has currently NOT authorized the release of protected health information to the Social Security Administration through Veterans Health Information Exchange.'

4.5. Comments Tab

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

Prerequisite:

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

Table 6: View/Add Patient Comments

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

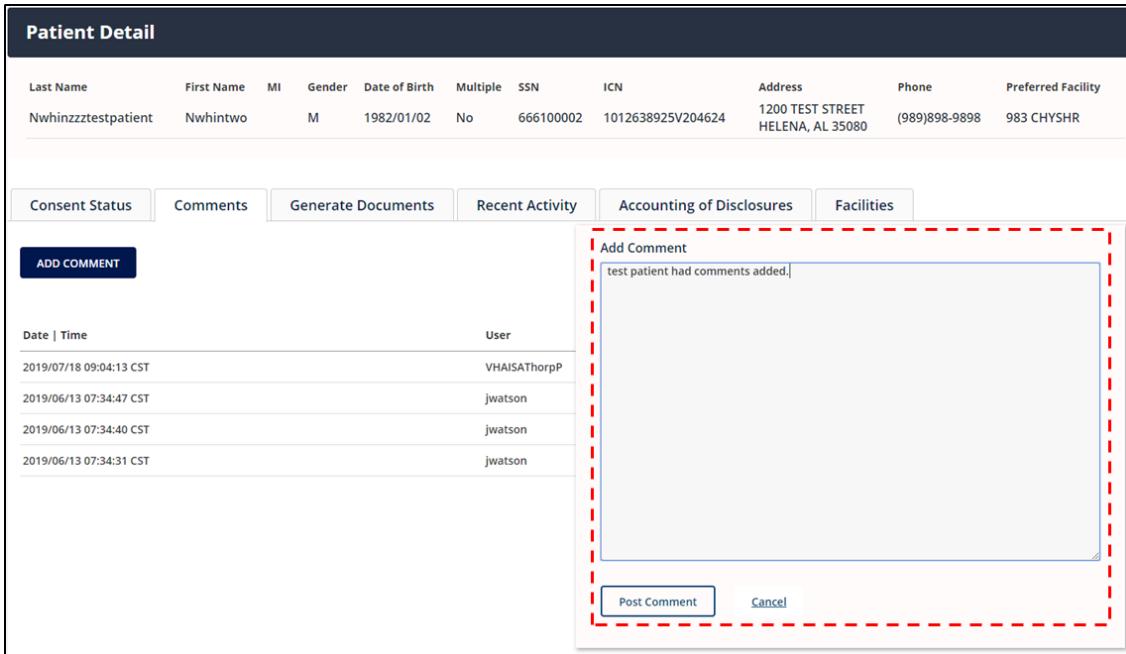
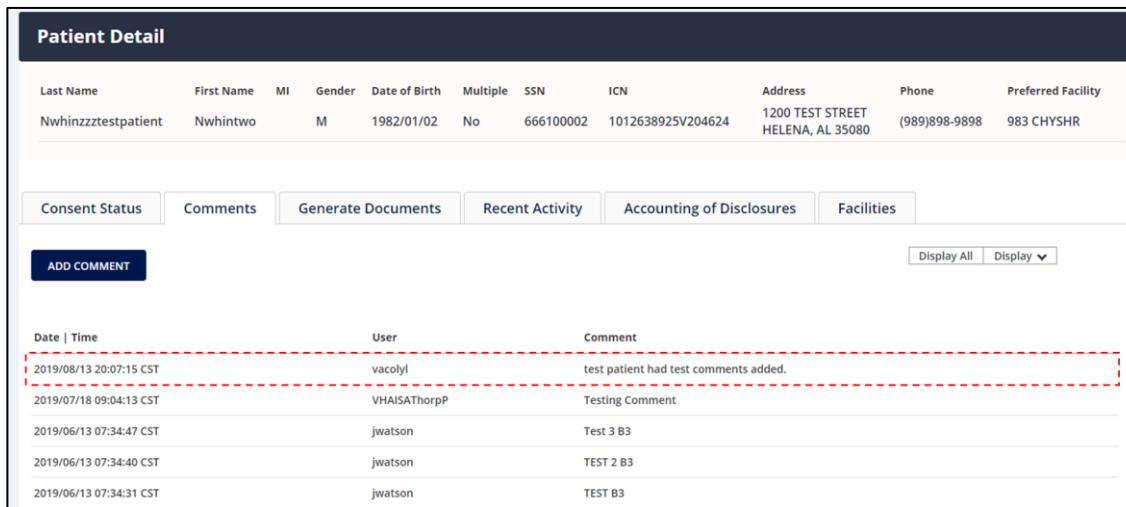
The screenshot shows the VHIE Portal interface with the 'Comments' tab selected. At the top, there is a navigation bar with the VA logo, 'VHIE PORTAL', 'Patient Search', 'Reports', 'Admin', 'Welcome, vacoly!', and 'Sign Out'. Below the navigation bar, a dark banner displays the message: '2019/06/17: Patient is Deceased, health information may no longer be shared electronically through eHealth Exchange.' The main content area is titled 'Patient Detail' and contains a table with patient information:

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

Below the table are several buttons: 'Consent Status', 'Comments', 'Generate Documents', 'Recent Activity', 'Accounting of Disclosures', and 'Facilities'. At the bottom of the page, there is a table showing a list of comments:

Date Time	User	Comment
2019/07/18 09:04:13 CST	VHAISATHorpP	Testing Comment
2019/06/13 07:34:47 CST	jwatson	Test 3 B3
2019/06/13 07:34:40 CST	jwatson	TEST 2 B3
2019/06/13 07:34:31 CST	jwatson	TEST B3

A red arrow points to the 'ADD COMMENT' button in the bottom-left corner of the comments section.

Step	Action
2.	<p>Complete the Add Comment field and click Post Comment button to submit comment.</p> 
3.	<p>The most current comment will display as the top comment.</p> <p>Note: Comments posted in this area are only viewable in VHIE Portal.</p> 

4.6. Generate Documents Tab

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

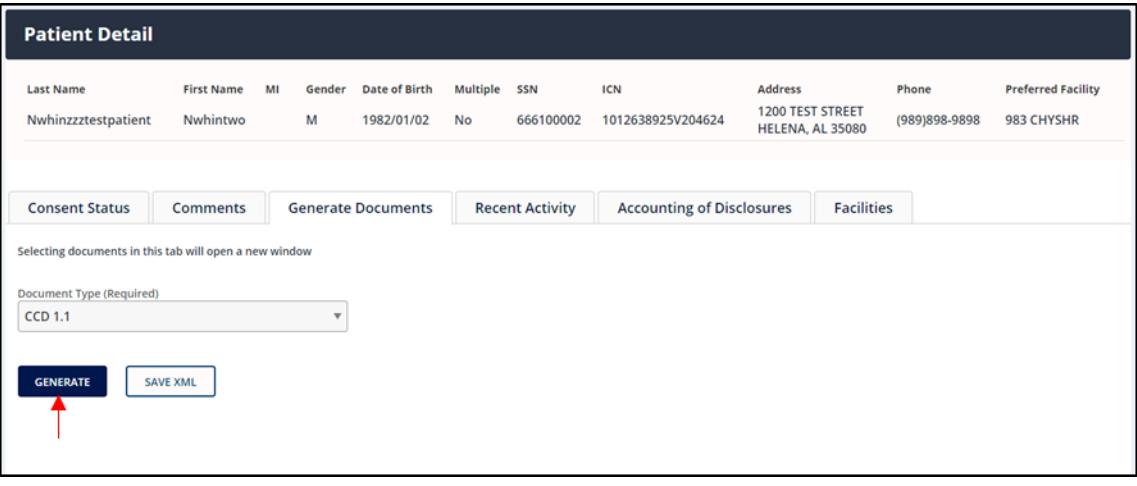
Prerequisite:

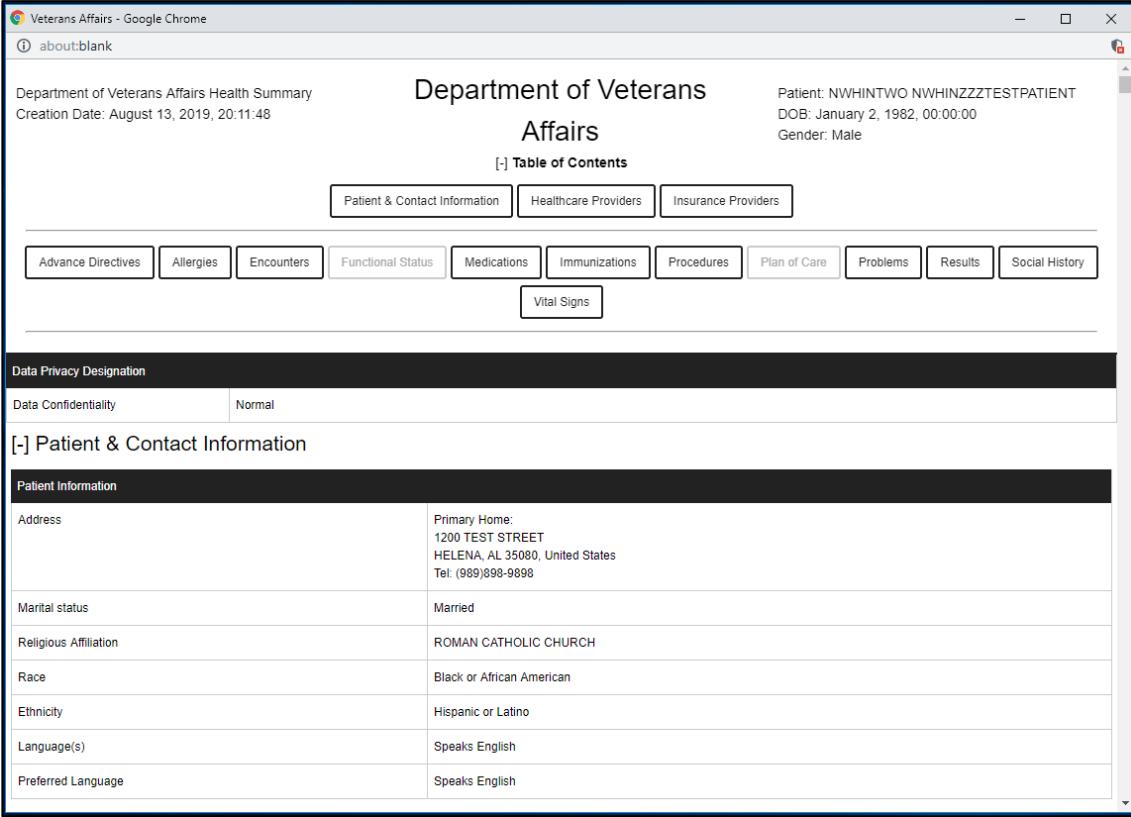
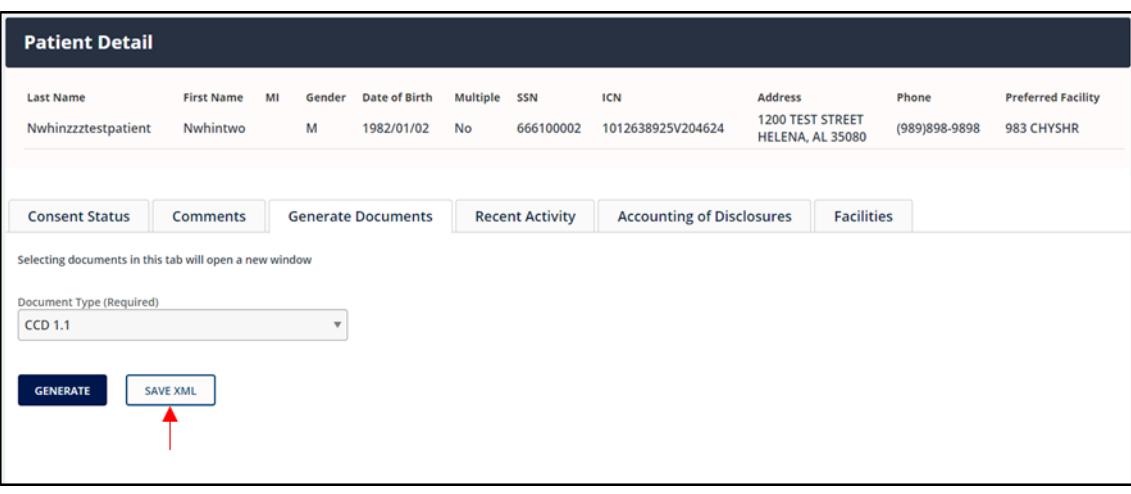
- The user has logged in via SSOi or another VA-approved method for authentication.
- The user has successfully retrieved a record from a Patient Search.

Note:

- 1) When generating a CCD v1.1, CCD v2.1, or C32, the artifact is generated in a new browser window.
- 2) When generating a C62 or SES, the results may return multiple documents and the user can choose which C62 or SES documents to view.
- 3) If the user experiences any issues with generating a document, it is recommended to configure the browser's security and privacy settings for the VHIE Portal to allow pop-ups and redirects.
 - a. If generating a C62, use the Google Chrome web browser for best result. Contents of the C62 text note are base64 encoded, requiring the browser to translate the data link URL, which IE is not doing for the C62.
- 4) To print the CDA-type document, the user can utilize the browser's built-in Print functionality to either print or do a print preview.

Table 7: Generate CCD 1.1, CCD 2.1, and C32

Step	Action
1.	<p>Under the Generate Documents Tab, select either CCD 1.1, CCD 2.1, or C32 as the Document Type and click Generate.</p> 

Step	Action
2.	<p>If available, the selected health document will generate in a new browser window.</p> 
3.	<p>To download either the CCD 1.1, CCD 2.1, or C32 as an XML, select the document under the Document Type field and click Save XML.</p> 

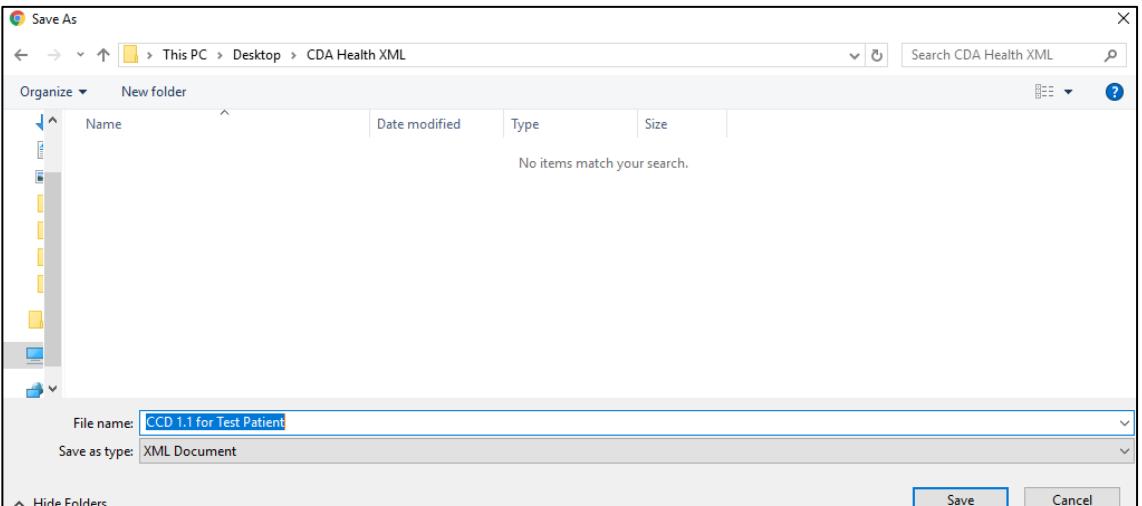
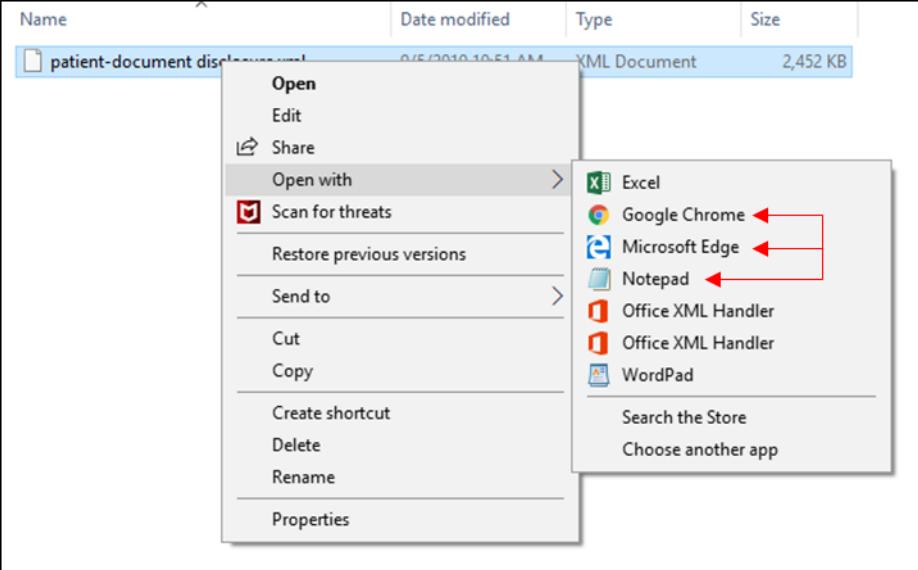
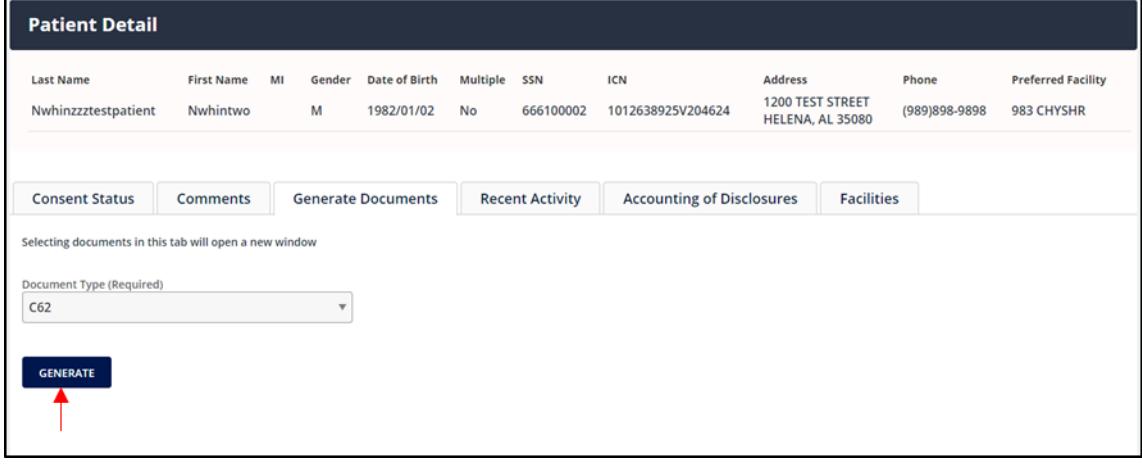
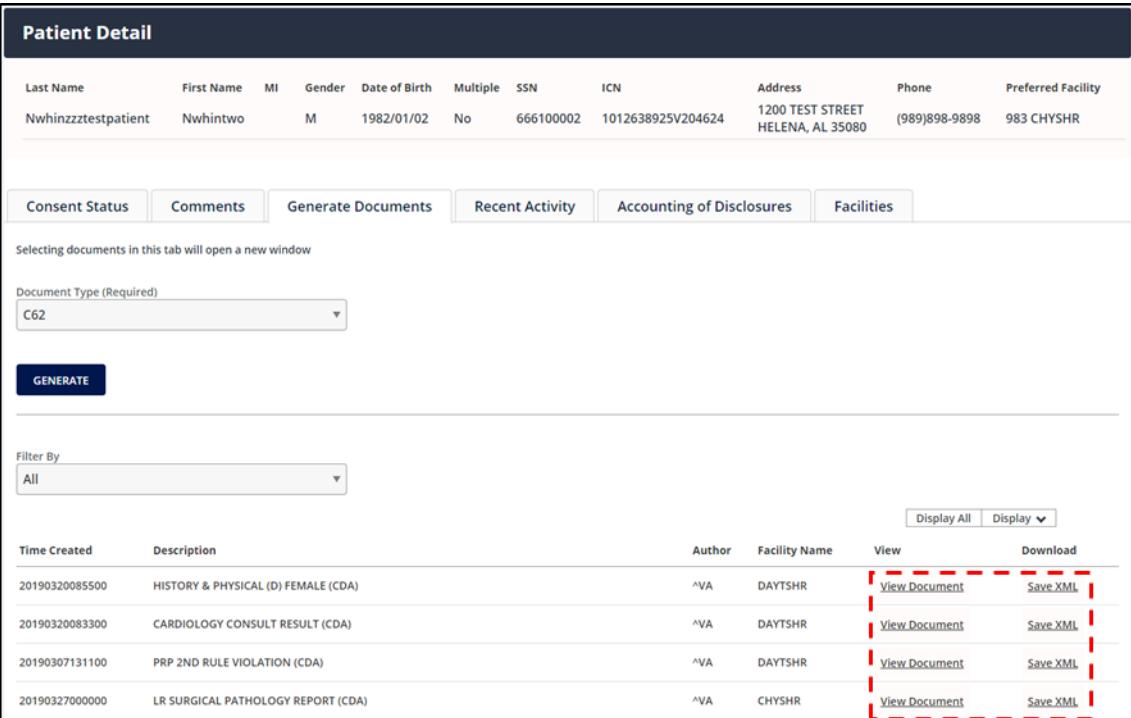
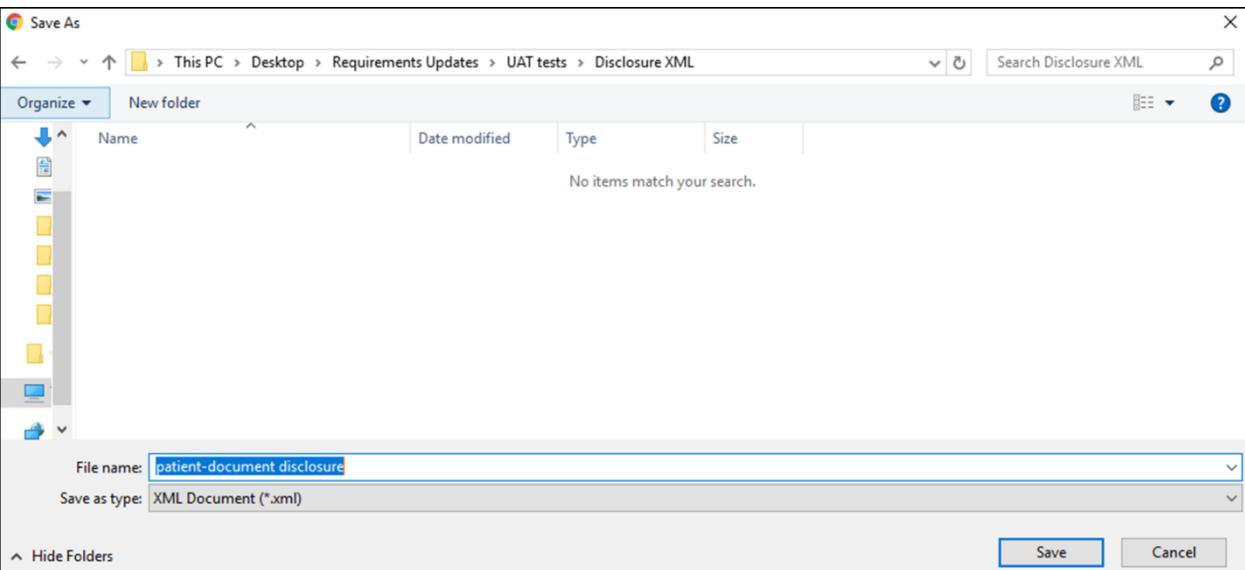
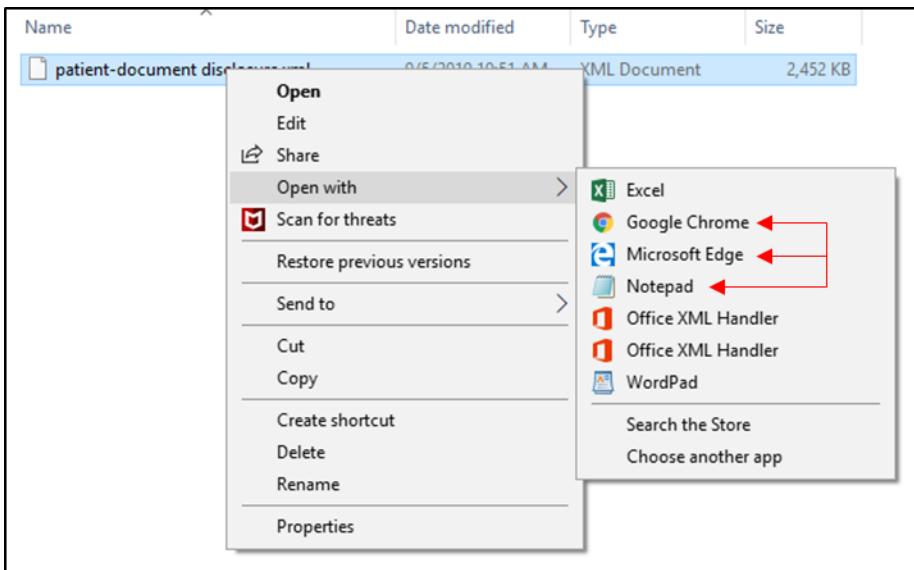
Step	Action
4.	<p>The user will be prompted to Save the file as an XML Document. Select the appropriate save location and click Save.</p> 
5.	<p>If using Google Chrome as the browser, the user must open the saved file using Google Chrome or another XML viewer application (e.g. MS Edge or Notepad).</p>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

Table 8: Generate C62 and SES

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

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

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

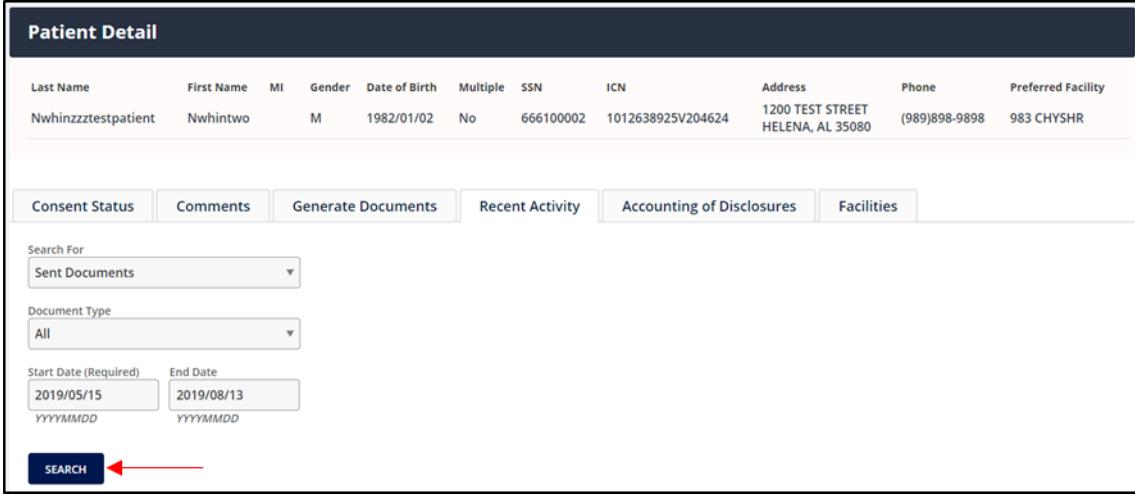
4.7. Recent Activity Tab

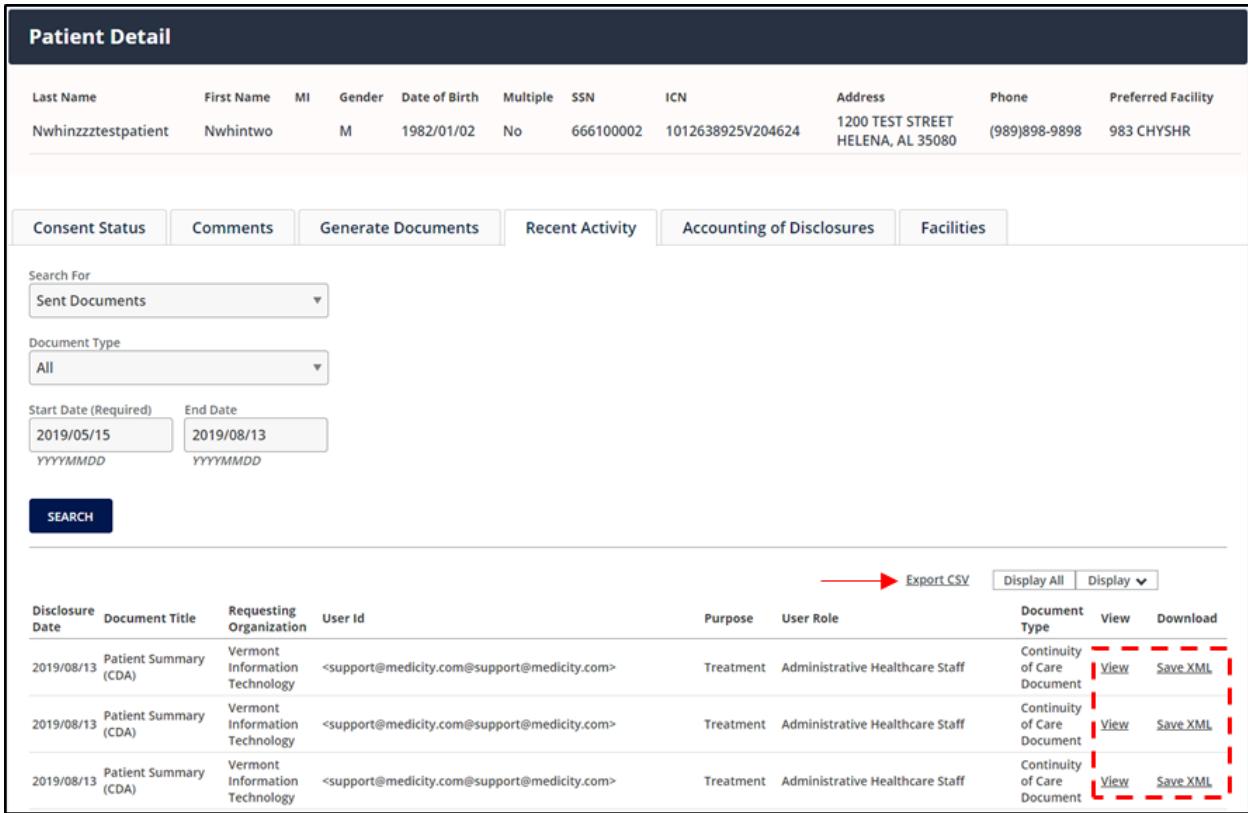
A VHIE user can select the Recent Activity tab in the Patient Detail page to generate a Patient-centric Sent Documents Report, which dates back 90-days.

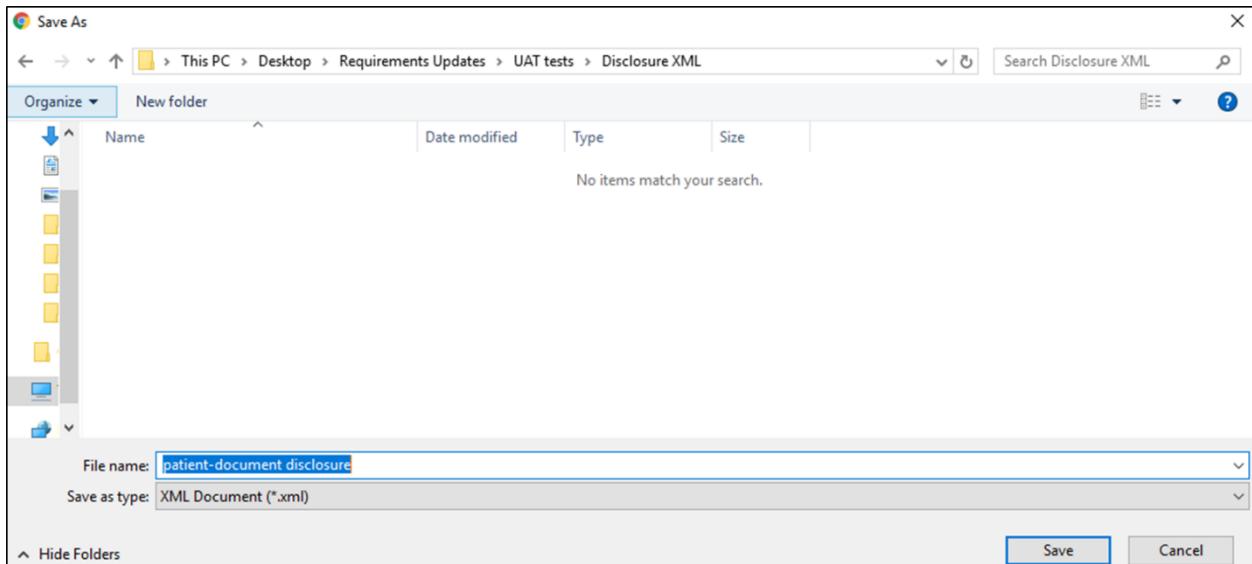
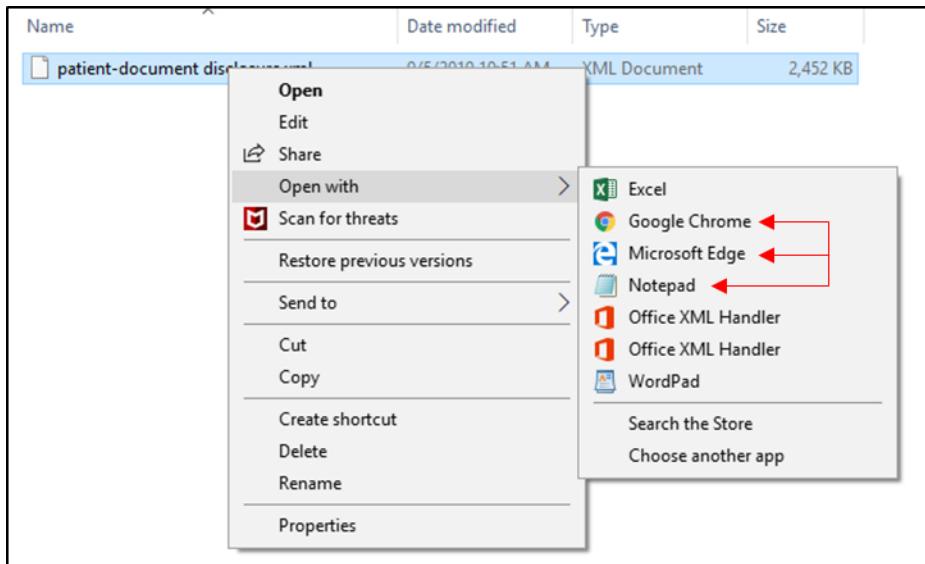
Prerequisite:

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

Table 9: Generate Patient-centric Sent Documents

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

Step	Action
2.	<p>In the returned results, the user can 1) export the report to a .CSV file by clicking Export CSV, 2) view the disclosure by clicking View next to the disclosure, and 3) save the disclosure as an XML by clicking Save XML.</p> <p>Note:</p> <ul style="list-style-type: none"> 1. View link will open the document in a new browser window and Save XML will prompt the user to save the file as an XML document. 2. If exporting this report into a .CSV file, users must reformat all cells under the Disclosure Date column from the default format to a format that will display the Date and Time (e.g. 3/14/12 1:30 PM). For more information, refer to Section 5: Troubleshooting.  <p>The screenshot shows the 'Patient Detail' page. At the top, there is a table with patient information: Last Name (Nwhinzztestpatient), First Name (Nwhintwo), MI (M), Gender (M), Date of Birth (1982/01/02), Multiple (No), SSN (666100002), ICN (1012638925V204624), Address (1200 TEST STREET HELENA, AL 35080), Phone ((989)898-9898), and Preferred Facility (983 CHYSHR). Below this is a navigation bar with links: Consent Status, Comments, Generate Documents, Recent Activity, Accounting of Disclosures, and Facilities. Underneath the navigation bar are search filters: 'Search For' (Sent Documents), 'Document Type' (All), 'Start Date (Required)' (2019/05/15), and 'End Date' (2019/08/13). A 'SEARCH' button is located below these filters. To the right of the search area is a red arrow pointing to the 'Export CSV' button. Below the search area is a table with three rows of disclosure results. Each row contains columns for Disclosure Date, Document Title, Requesting Organization, User Id, Purpose, User Role, Document Type, View, and Download. The 'View' and 'Save XML' links for each row are highlighted with red dashed boxes.</p>

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

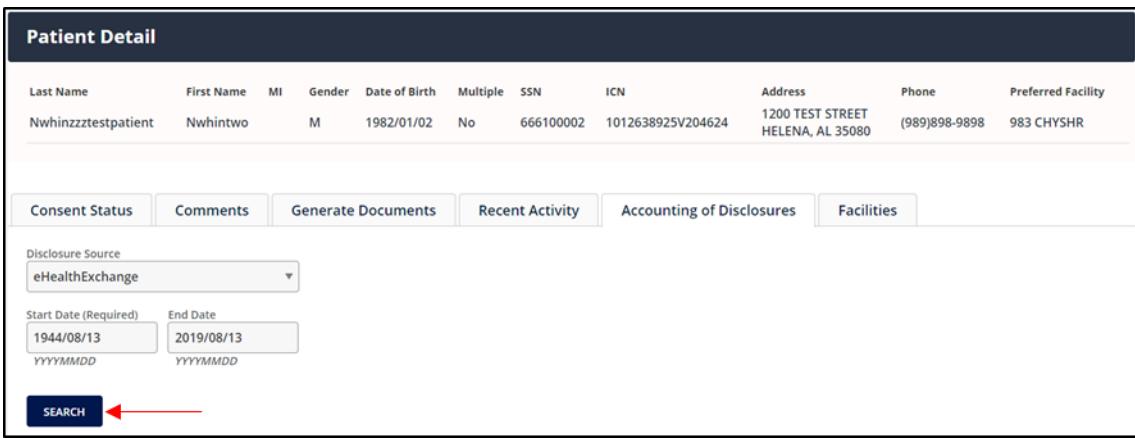
4.8. Accounting of Disclosures Tab

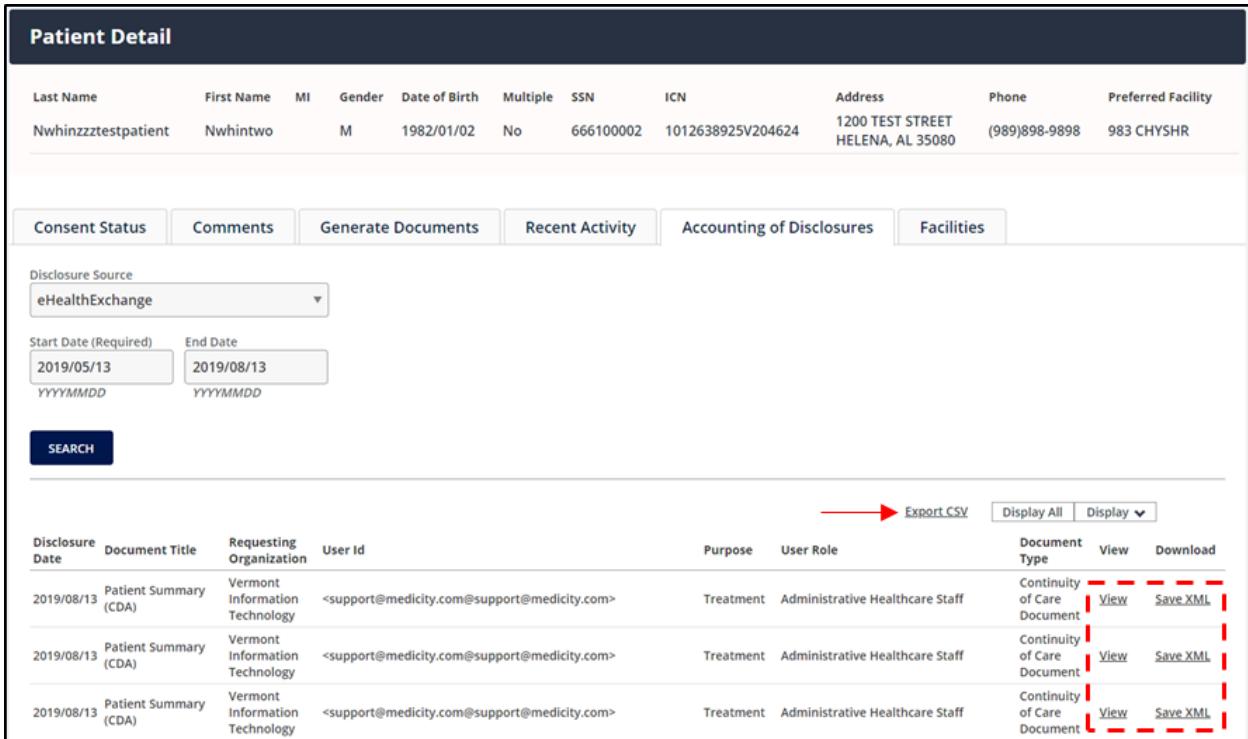
A VHIE user can select the Accounting of Disclosures Tab in the Patient Detail page to generate a Patient-centric Accounting of Disclosures Report, which dates back 75-years.

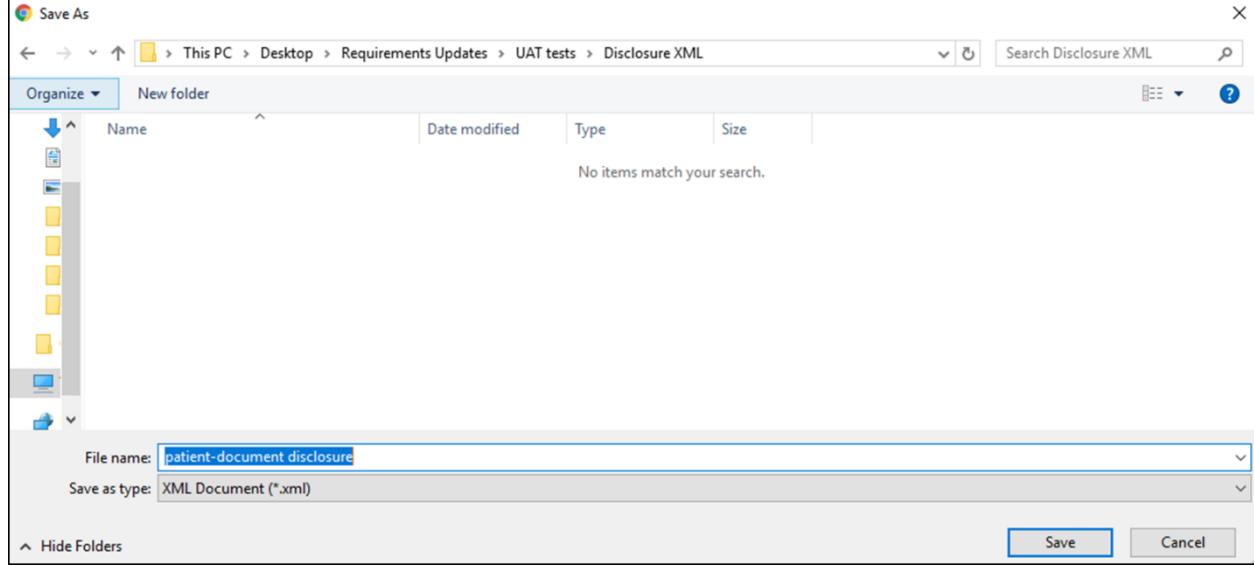
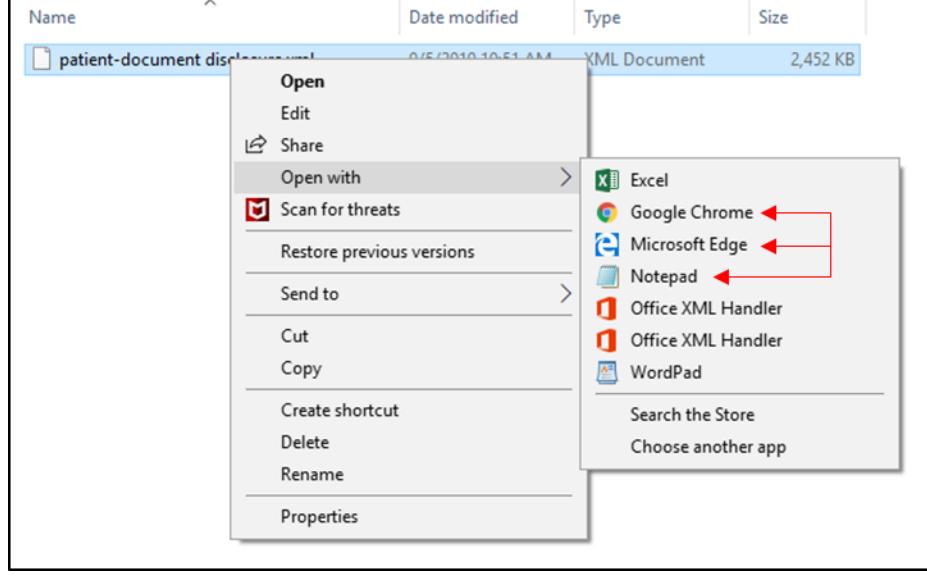
Prerequisite:

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

Table 10: Generate Patient-centric Accounting of Disclosures

Step	Action
1.	<p>Under the Accounting of Disclosures Tab, complete the appropriate fields and click Search.</p> 

Step	Action																																				
2.	<p>In the returned results, the user can 1) export the report to a .CSV file by clicking Export CSV, 2) view the disclosure by clicking View next to the disclosure, and 3) save the disclosure as an XML by clicking Save XML.</p> <p>Note:</p> <ol style="list-style-type: none"> 1. View link will open the document in a new browser window and Save XML will prompt the user to save the file as an XML document. 2. If exporting this report into a .CSV file, users must reformat all cells under the Disclosure Date column from the default format to a format that will display the Date and Time (e.g. 3/14/12 1:30 PM). For more information, refer to Section 5: Troubleshooting.  <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; padding: 5px;">Disclosure Date</th> <th style="text-align: left; padding: 5px;">Document Title</th> <th style="text-align: left; padding: 5px;">Requesting Organization</th> <th style="text-align: left; padding: 5px;">User Id</th> <th style="text-align: left; padding: 5px;">Purpose</th> <th style="text-align: left; padding: 5px;">User Role</th> <th style="text-align: left; padding: 5px;">Document Type</th> <th style="text-align: left; padding: 5px;">View</th> <th style="text-align: left; padding: 5px;">Download</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">2019/08/13</td> <td style="padding: 5px;">Patient Summary (CDA)</td> <td style="padding: 5px;">Vermont Information Technology</td> <td style="padding: 5px;"><support@medicity.com></td> <td style="padding: 5px;">Treatment</td> <td style="padding: 5px;">Administrative Healthcare Staff</td> <td style="padding: 5px;">Continuity of Care Document</td> <td style="padding: 5px; border: 2px dashed red;">View</td> <td style="padding: 5px; border: 2px dashed red;">Save XML</td> </tr> <tr> <td style="padding: 5px;">2019/08/13</td> <td style="padding: 5px;">Patient Summary (CDA)</td> <td style="padding: 5px;">Vermont Information Technology</td> <td style="padding: 5px;"><support@medicity.com></td> <td style="padding: 5px;">Treatment</td> <td style="padding: 5px;">Administrative Healthcare Staff</td> <td style="padding: 5px;">Continuity of Care Document</td> <td style="padding: 5px; border: 2px dashed red;">View</td> <td style="padding: 5px; border: 2px dashed red;">Save XML</td> </tr> <tr> <td style="padding: 5px;">2019/08/13</td> <td style="padding: 5px;">Patient Summary (CDA)</td> <td style="padding: 5px;">Vermont Information Technology</td> <td style="padding: 5px;"><support@medicity.com></td> <td style="padding: 5px;">Treatment</td> <td style="padding: 5px;">Administrative Healthcare Staff</td> <td style="padding: 5px;">Continuity of Care Document</td> <td style="padding: 5px; border: 2px dashed red;">View</td> <td style="padding: 5px; border: 2px dashed red;">Save XML</td> </tr> </tbody> </table>	Disclosure Date	Document Title	Requesting Organization	User Id	Purpose	User Role	Document Type	View	Download	2019/08/13	Patient Summary (CDA)	Vermont Information Technology	<support@medicity.com>	Treatment	Administrative Healthcare Staff	Continuity of Care Document	View	Save XML	2019/08/13	Patient Summary (CDA)	Vermont Information Technology	<support@medicity.com>	Treatment	Administrative Healthcare Staff	Continuity of Care Document	View	Save XML	2019/08/13	Patient Summary (CDA)	Vermont Information Technology	<support@medicity.com>	Treatment	Administrative Healthcare Staff	Continuity of Care Document	View	Save XML
Disclosure Date	Document Title	Requesting Organization	User Id	Purpose	User Role	Document Type	View	Download																													
2019/08/13	Patient Summary (CDA)	Vermont Information Technology	<support@medicity.com>	Treatment	Administrative Healthcare Staff	Continuity of Care Document	View	Save XML																													
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2019/08/13	Patient Summary (CDA)	Vermont Information Technology	<support@medicity.com>	Treatment	Administrative Healthcare Staff	Continuity of Care Document	View	Save XML																													

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

4.9. Facilities Tab

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

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

Prerequisite:

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

Figure 4: View Patient's Treatment Facilities

The screenshot shows the VHIE Portal interface. At the top, there is a dark header bar with the VA logo, 'VHIE PORTAL', 'Patient Search', 'Reports', 'Admin', 'Welcome, vacoly', and 'Sign Out'. Below the header is a dark blue navigation bar with the title 'Patient Detail'. Underneath is a table with patient details: Last Name (Nwhinzzztestpatient), First Name (Nwhintwo), MI (M), Gender (M), Date of Birth (1982/01/02), Multiple (No), SSN (666100002), ICN (1012638925V204624), Address (1200 TEST STREET HELENA, AL 35080), Phone ((989)898-9898), and Preferred Facility (983 CHYSHR). Below the table is a horizontal menu with tabs: 'Consent Status', 'Comments', 'Generate Documents', 'Recent Activity', 'Accounting of Disclosures', and 'Facilities'. The 'Facilities' tab is selected. At the bottom right of this menu is a dropdown labeled 'Display All' and 'Display'. A table below lists facilities: VHSN 1 - VA New England Healthcare System (Facility Station Number 983, Facility Name CHYSHR, Facility Children VAMC Names: 538 - CHILLICOTHE OH VAMC, 517 - BECKLEY VAMC, 992 - CHYSQAS); and VHSN 2 - VA Healthcare Network Upstate New York (Facility Station Number 984, Facility Name DAYTSHR, Facility Children VAMC Names: 610 - NORTHERN INDIANA HEALTH CARE SYSTEM - MARION DIVISION, 565 - FAYETTEVILLE NC VAMC, 402 - MAINE VA HCS).

4.10. Search Menu – Return to Patient Search

From within the VHIE Portal, a VHIE user can select the “Patient Search” option at the top of the webpage to return to the default Patient Search Page.

Prerequisite:

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

Figure 5: Return to Patient Search

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

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

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

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

4.11. Reports - Dashboard Widgets

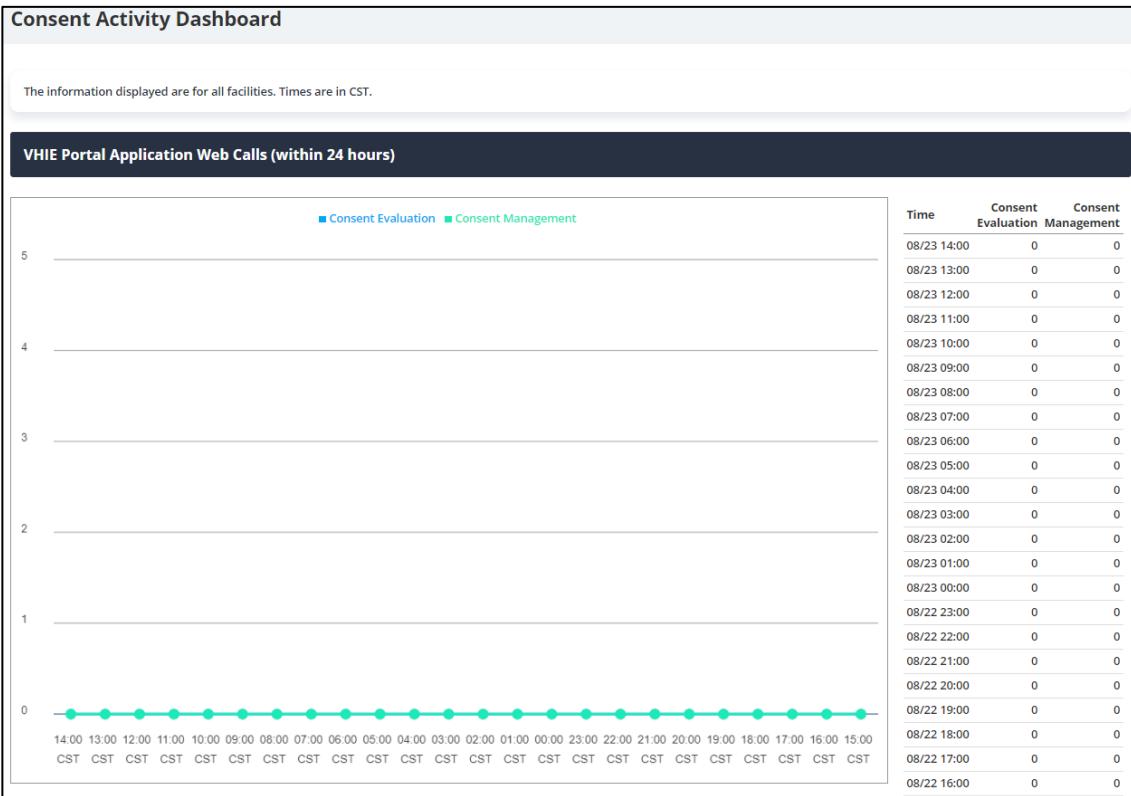
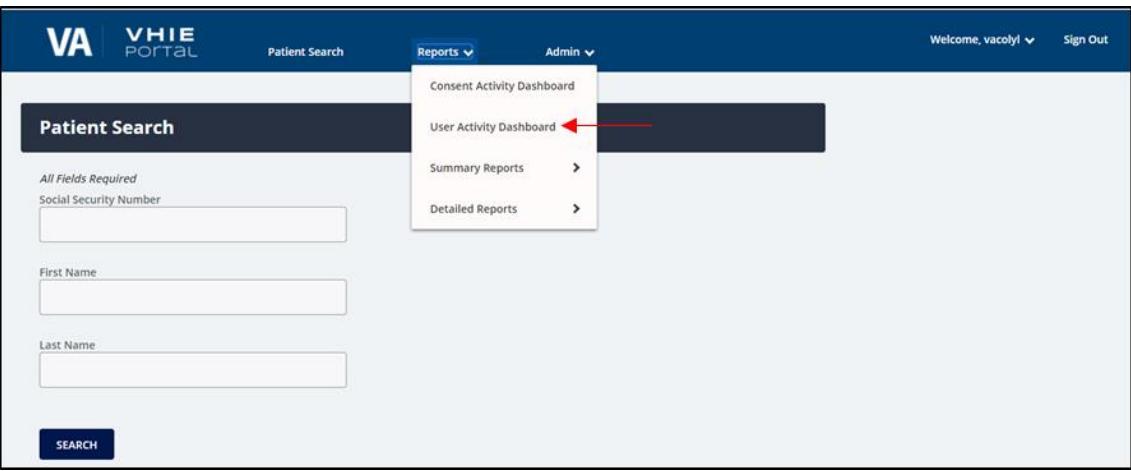
From within the VHIE Portal, a VHIE user can click the “Reports” option at the top of the webpage to select and generate either the Consent Activity or User Activity Dashboard. The Consent Activity Dashboard displays the number of web calls made to the VHIE Portal within the past 24-hours. The User Activity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

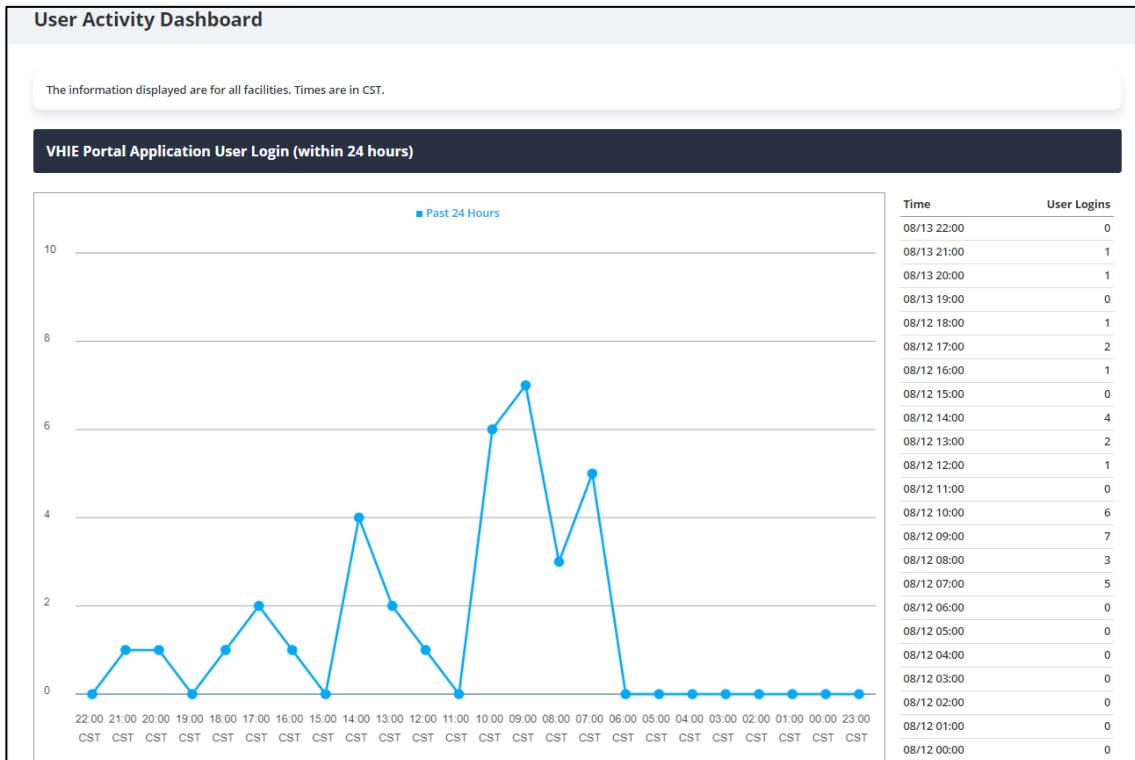
Prerequisite:

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

Table 11: Reports - Dashboard Widgets

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

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

Step	Action																																																
4.	<p>If any user accounts were logged into the VHIE Portal application within the past 24-hours, the information will display in the generated graph.</p>  <p>The User Activity Dashboard displays a line graph titled "VHIE Portal Application User Login (within 24 hours)" and a corresponding table of user logins. The graph shows the number of logins per hour from 22:00 CST on August 13 to 00:00 CST on August 12. The table lists the time of each login and the count of users who logged in at that specific time.</p> <table border="1" data-bbox="1215 530 1437 1100"> <thead> <tr> <th>Time</th> <th>User Logins</th> </tr> </thead> <tbody> <tr><td>08/13 22:00</td><td>0</td></tr> <tr><td>08/13 21:00</td><td>1</td></tr> <tr><td>08/13 20:00</td><td>1</td></tr> <tr><td>08/13 19:00</td><td>0</td></tr> <tr><td>08/12 18:00</td><td>1</td></tr> <tr><td>08/12 17:00</td><td>2</td></tr> <tr><td>08/12 16:00</td><td>1</td></tr> <tr><td>08/12 15:00</td><td>0</td></tr> <tr><td>08/12 14:00</td><td>4</td></tr> <tr><td>08/12 13:00</td><td>2</td></tr> <tr><td>08/12 12:00</td><td>1</td></tr> <tr><td>08/12 11:00</td><td>0</td></tr> <tr><td>08/12 10:00</td><td>6</td></tr> <tr><td>08/12 09:00</td><td>7</td></tr> <tr><td>08/12 08:00</td><td>3</td></tr> <tr><td>08/12 07:00</td><td>5</td></tr> <tr><td>08/12 06:00</td><td>0</td></tr> <tr><td>08/12 05:00</td><td>0</td></tr> <tr><td>08/12 04:00</td><td>0</td></tr> <tr><td>08/12 03:00</td><td>0</td></tr> <tr><td>08/12 02:00</td><td>0</td></tr> <tr><td>08/12 01:00</td><td>0</td></tr> <tr><td>08/12 00:00</td><td>0</td></tr> </tbody> </table>	Time	User Logins	08/13 22:00	0	08/13 21:00	1	08/13 20:00	1	08/13 19:00	0	08/12 18:00	1	08/12 17:00	2	08/12 16:00	1	08/12 15:00	0	08/12 14:00	4	08/12 13:00	2	08/12 12:00	1	08/12 11:00	0	08/12 10:00	6	08/12 09:00	7	08/12 08:00	3	08/12 07:00	5	08/12 06:00	0	08/12 05:00	0	08/12 04:00	0	08/12 03:00	0	08/12 02:00	0	08/12 01:00	0	08/12 00:00	0
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4.12. Reports – Detailed HIE and Consent Reports

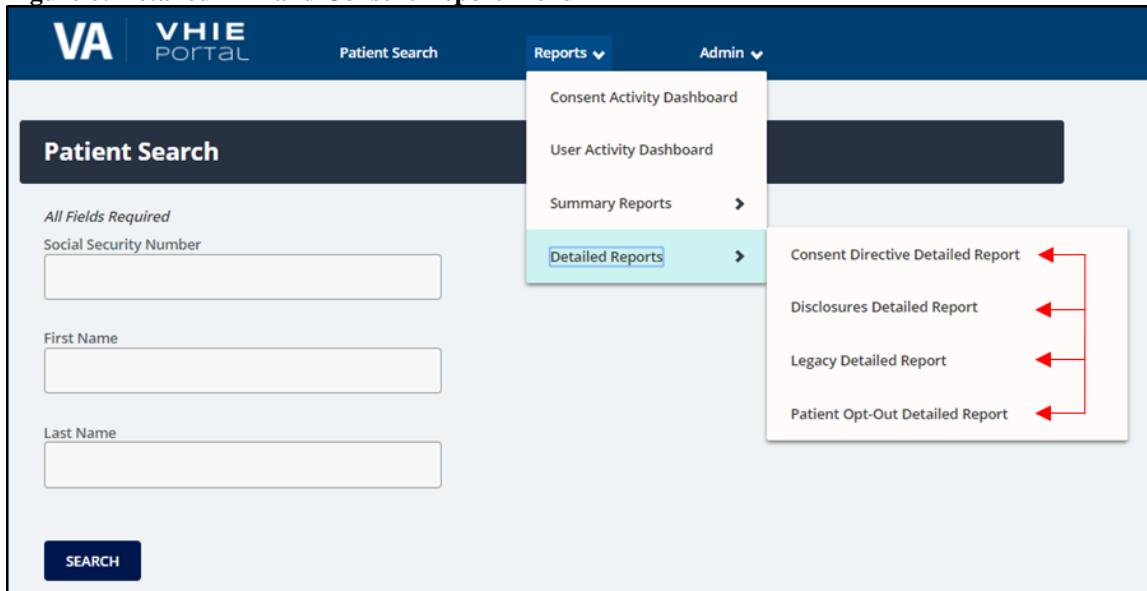
From within the VHIE Portal, a VHIE user can click the “Reports” option at the top of the webpage to select and generate the Detailed HIE and Consent Reports. The Detailed HIE and Consent Reports includes the following:

- Consent Directive Detailed Report
- Disclosures Detailed Report
- Legacy Detailed Report
- Patient Opt-Out Detailed Report

Prerequisite:

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

Figure 6: Detailed HIE and Consent Report Menu

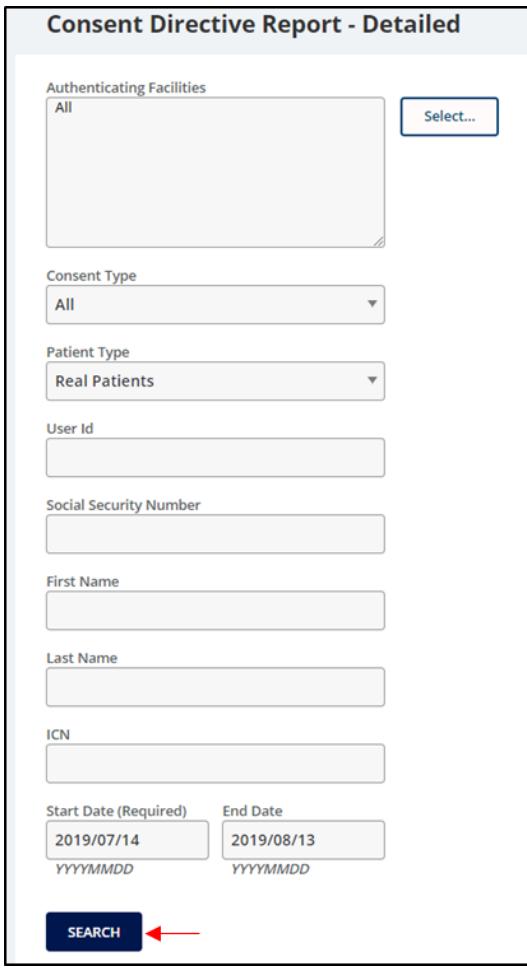


4.12.1. Consent Directive Detailed Report

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

Table 12: Consent Directive Detailed Report

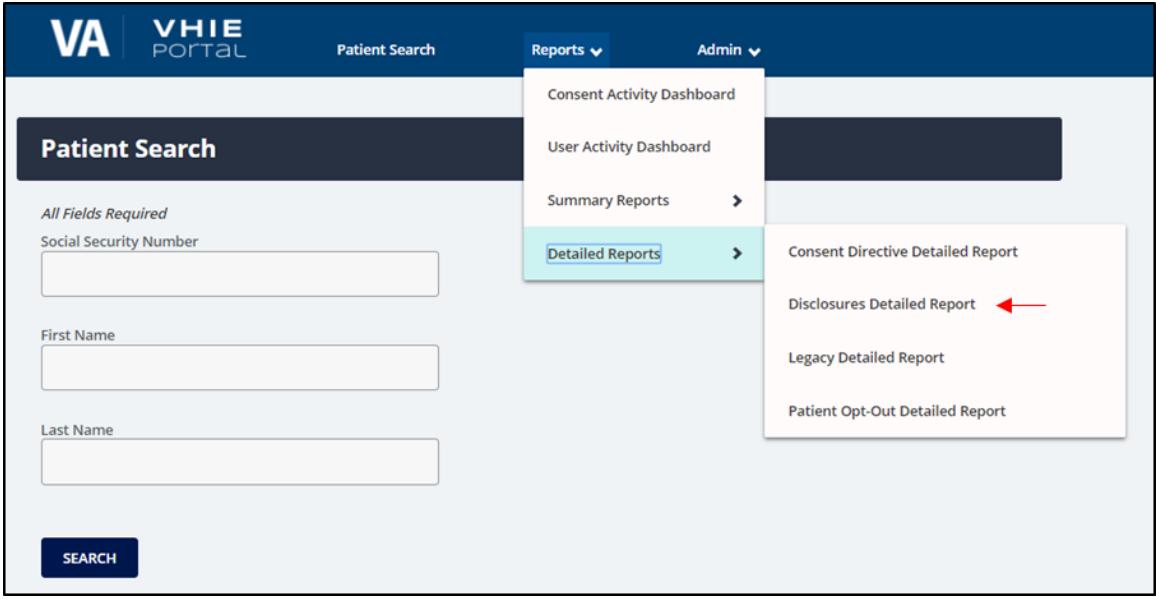
Step	Action
1.	Select Consent Directive Detailed Report. <p>The screenshot shows the VHIE Portal interface, identical to Figure 6, but with a red arrow pointing to the 'Consent Directive Detailed Report' option in the 'Detailed Reports' dropdown menu.</p>

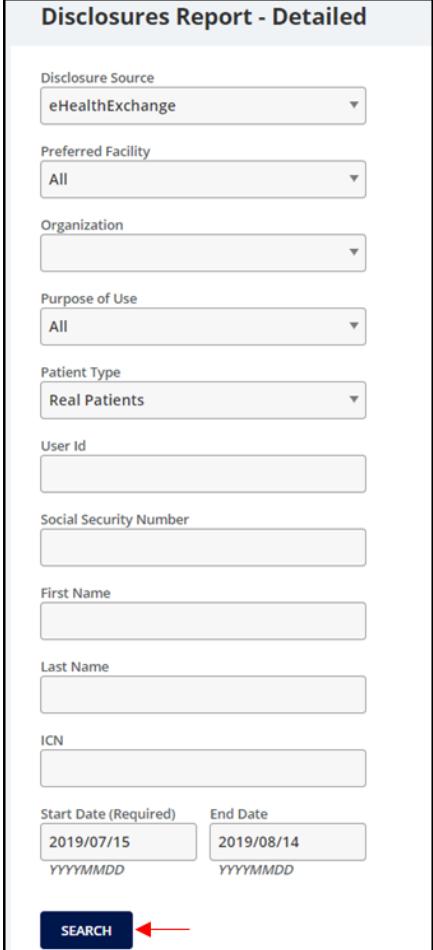
Step	Action																																																																																																																					
2.	<p>Complete the appropriate search criteria, then click Search.</p> 																																																																																																																					
3.	<p>In the returned results, the user can export the report to a .CSV file by clicking Export CSV.</p>  <table border="1" data-bbox="311 1360 1457 1856"> <thead> <tr> <th>SSN</th> <th>ICN</th> <th>Last Name</th> <th>First Name</th> <th>Time of Event</th> <th>Signature Date</th> <th>Purpose of Use</th> <th>Consent Type</th> <th>Reason</th> <th>User Id</th> <th>Authorizing Facility</th> <th>VISN</th> <th>View</th> </tr> </thead> <tbody> <tr> <td>796017172</td> <td>1012592963V937803</td> <td>WHEELER</td> <td>LEONARD</td> <td>2019/08/12 10:19:00 CST</td> <td>2019/08/12</td> <td>TREATMENT</td> <td>eHealth Exchange Opt-out</td> <td>Opt-out</td> <td>DataMigration</td> <td>Unknown</td> <td></td> <td></td> </tr> <tr> <td>796022234</td> <td>1012592954V501502</td> <td>ROSS</td> <td>GLORIA</td> <td>2019/08/12 10:18:57 CST</td> <td>2019/08/12</td> <td>TREATMENT</td> <td>eHealth Exchange Opt-out</td> <td>Opt-out</td> <td>DataMigration</td> <td>Unknown</td> <td></td> <td></td> </tr> <tr> <td>796079018</td> <td>1012658430V604777</td> <td>WATSON</td> <td>RUSSELL</td> <td>2019/08/12 10:13:19 CST</td> <td>2017/04/10</td> <td>TREATMENT</td> <td>eHealth Exchange Opt-out</td> <td>Opt-out</td> <td>DataMigration</td> <td>Unknown</td> <td></td> <td></td> </tr> <tr> <td>796066619</td> <td>1012592962V751978</td> <td>WILSON</td> <td>LEONA</td> <td>2019/08/12 10:12:37 CST</td> <td>2019/08/12</td> <td>TREATMENT</td> <td>eHealth Exchange Opt-out</td> <td>Opt-out</td> <td>DataMigration</td> <td>Unknown</td> <td></td> <td></td> </tr> <tr> <td>796056674</td> <td>1012592966V272192</td> <td>SCOTT</td> <td>DIANNE</td> <td>2019/08/12 10:12:22 CST</td> <td>2019/08/12</td> <td>TREATMENT</td> <td>eHealth Exchange Opt-out</td> <td>Opt-out</td> <td>DataMigration</td> <td>Unknown</td> <td></td> <td></td> </tr> <tr> <td>796060339</td> <td>1012592959V436136</td> <td>WOOD</td> <td>JAMIE</td> <td>2019/08/12 10:10:52 CST</td> <td>2019/08/12</td> <td>TREATMENT</td> <td>eHealth Exchange Opt-out</td> <td>Opt-out</td> <td>DataMigration</td> <td>Unknown</td> <td></td> <td></td> </tr> <tr> <td>111109999</td> <td>1011230922V699704</td> <td>NHNPATIENT</td> <td>JOSEPH</td> <td>2019/08/12 10:10:07 CST</td> <td>2016/10/18</td> <td>TREATMENT</td> <td>eHealth Exchange Opt-out</td> <td>Opt-out</td> <td>DataMigration</td> <td>ASHEVILLE VAMC</td> <td>VISN 6 - VA Mid-Atlantic Health Care Network</td> <td></td> </tr> <tr> <td>154578722</td> <td>1012647053V192196</td> <td>RODDICK</td> <td>MARK</td> <td>2019/07/30 11:43:00 CST</td> <td>2019/07/30</td> <td>TREATMENT</td> <td>eHealth Exchange Re-participate</td> <td>Entered in Error</td> <td>VHAISHSoate</td> <td>ALEDA E. LUTZ VA MEDICAL CENTER</td> <td>VISN 10 - VA Healthcare System of Ohio</td> <td></td> </tr> </tbody> </table>	SSN	ICN	Last Name	First Name	Time of Event	Signature Date	Purpose of Use	Consent Type	Reason	User Id	Authorizing Facility	VISN	View	796017172	1012592963V937803	WHEELER	LEONARD	2019/08/12 10:19:00 CST	2019/08/12	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	Unknown			796022234	1012592954V501502	ROSS	GLORIA	2019/08/12 10:18:57 CST	2019/08/12	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	Unknown			796079018	1012658430V604777	WATSON	RUSSELL	2019/08/12 10:13:19 CST	2017/04/10	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	Unknown			796066619	1012592962V751978	WILSON	LEONA	2019/08/12 10:12:37 CST	2019/08/12	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	Unknown			796056674	1012592966V272192	SCOTT	DIANNE	2019/08/12 10:12:22 CST	2019/08/12	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	Unknown			796060339	1012592959V436136	WOOD	JAMIE	2019/08/12 10:10:52 CST	2019/08/12	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	Unknown			111109999	1011230922V699704	NHNPATIENT	JOSEPH	2019/08/12 10:10:07 CST	2016/10/18	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	ASHEVILLE VAMC	VISN 6 - VA Mid-Atlantic Health Care Network		154578722	1012647053V192196	RODDICK	MARK	2019/07/30 11:43:00 CST	2019/07/30	TREATMENT	eHealth Exchange Re-participate	Entered in Error	VHAISHSoate	ALEDA E. LUTZ VA MEDICAL CENTER	VISN 10 - VA Healthcare System of Ohio	
SSN	ICN	Last Name	First Name	Time of Event	Signature Date	Purpose of Use	Consent Type	Reason	User Id	Authorizing Facility	VISN	View																																																																																																										
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111109999	1011230922V699704	NHNPATIENT	JOSEPH	2019/08/12 10:10:07 CST	2016/10/18	TREATMENT	eHealth Exchange Opt-out	Opt-out	DataMigration	ASHEVILLE VAMC	VISN 6 - VA Mid-Atlantic Health Care Network																																																																																																											
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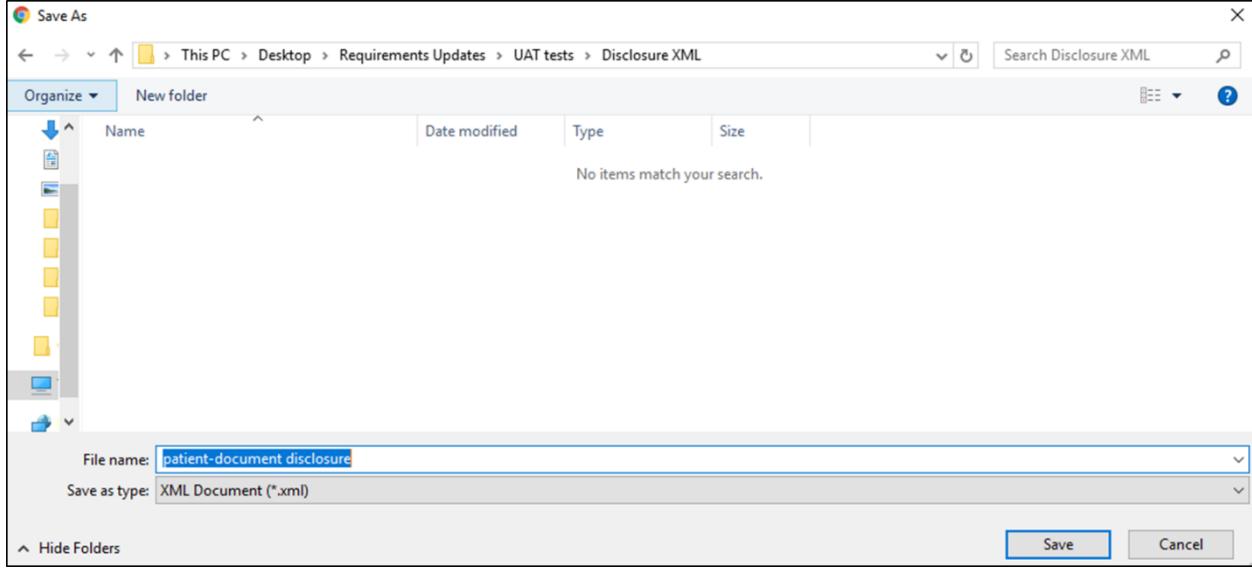
4.12.2. Disclosures Detailed Report

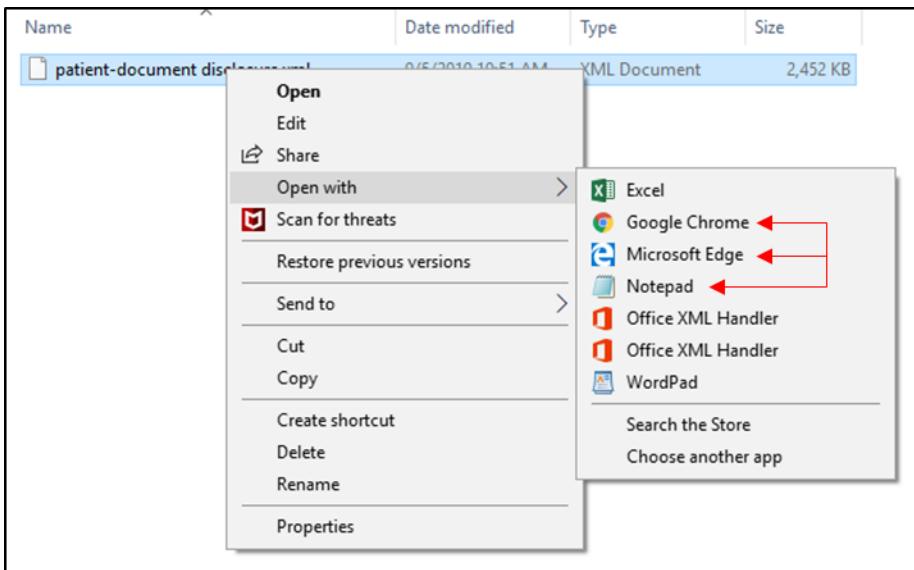
The Disclosures Detailed Report provides analytical Accounting of Disclosures information that may date back to a maximum of 75-years from date of last activity.

Table 13: Disclosures Detailed Report

Step	Action
1.	Select Disclosures Detailed Report. 

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

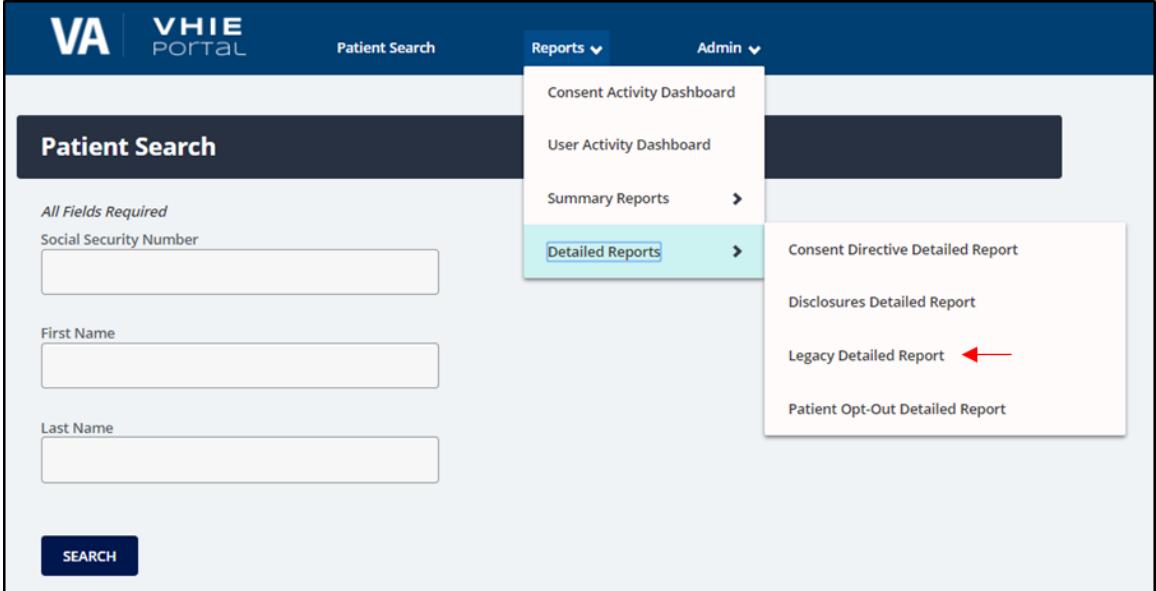
Step	Action
3.	<p>In the returned results for the Disclosures Detailed Report, the user can 1) export the report to a .CSV file by clicking Export CSV, 2) view the disclosure by clicking View next to the disclosure, and 3) save the disclosure as an XML by clicking Save XML.</p> <p>Note:</p> <ol style="list-style-type: none"> 1. View link will open the document in a new browser window and Save XML will prompt the user to save the file as an XML document. 2. If exporting this report into a .CSV file, users must reformat all cells under the Disclosure Date column from the default format to a format that will display the Date and Time (e.g. 3/14/12 1:30 PM). For more information, refer to Section 5: Troubleshooting. 
4.	<p>When downloading the XML, Save XML as a file.</p> 

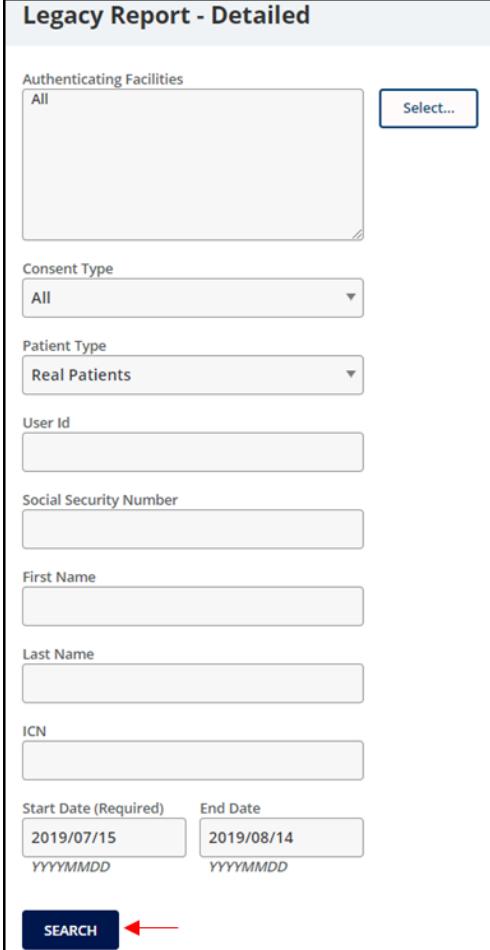
Step	Action
5.	<p>If using Google Chrome as the browser, the user must open the saved file using Google Chrome or another XML viewer application (e.g. MS Edge or Notepad).</p> <p>Note: If the user is using IE as the browser when downloading the XML, this step is not necessary as IE is used as the default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

4.12.3. Legacy Detailed Report

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

Table 14: Legacy Detailed Report

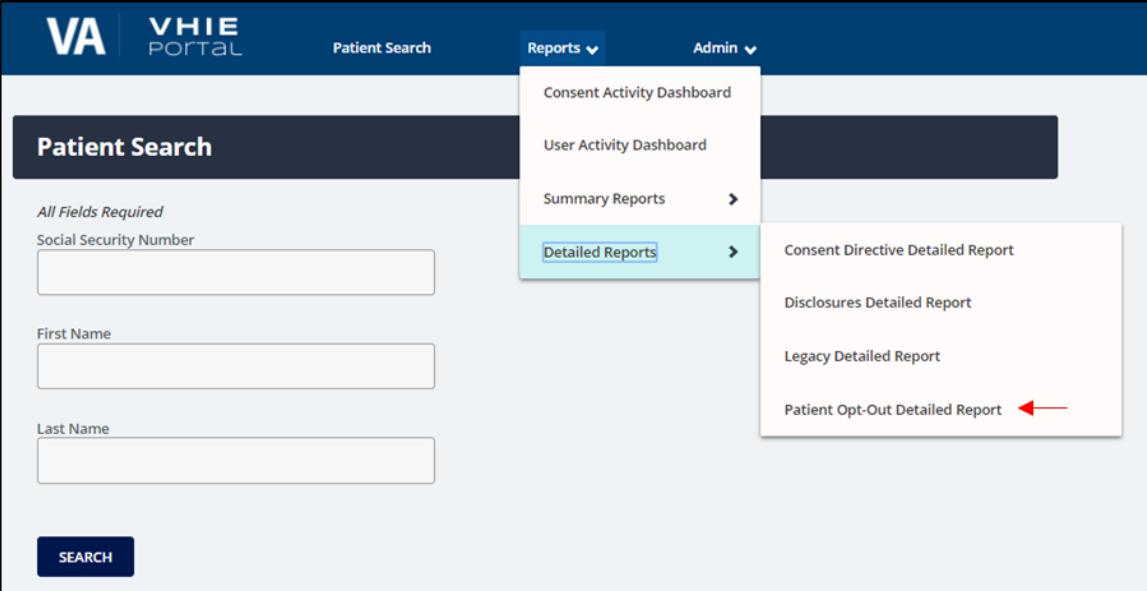
Step	Action
1.	Select Legacy Detailed Report. 

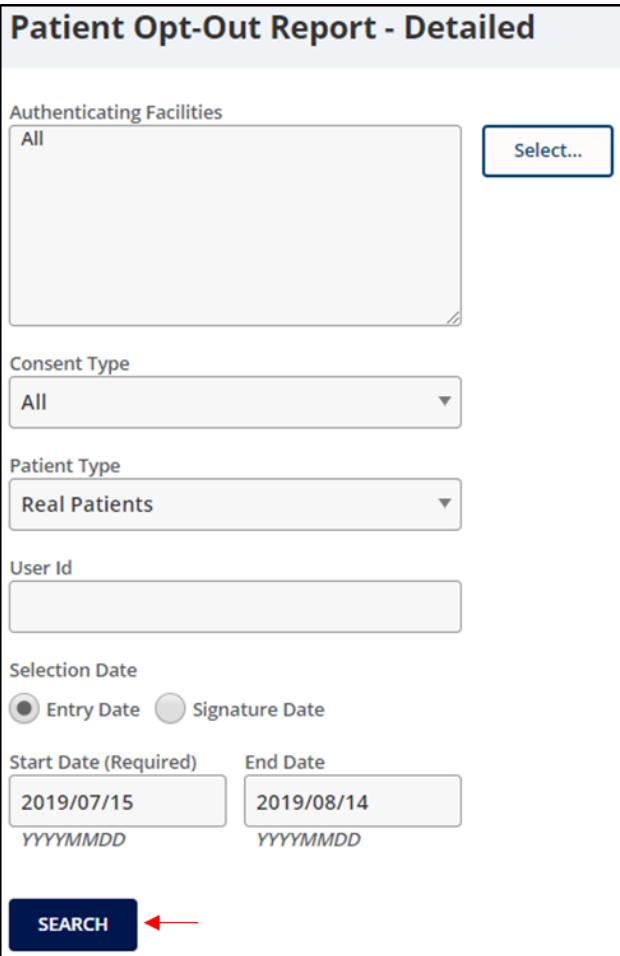
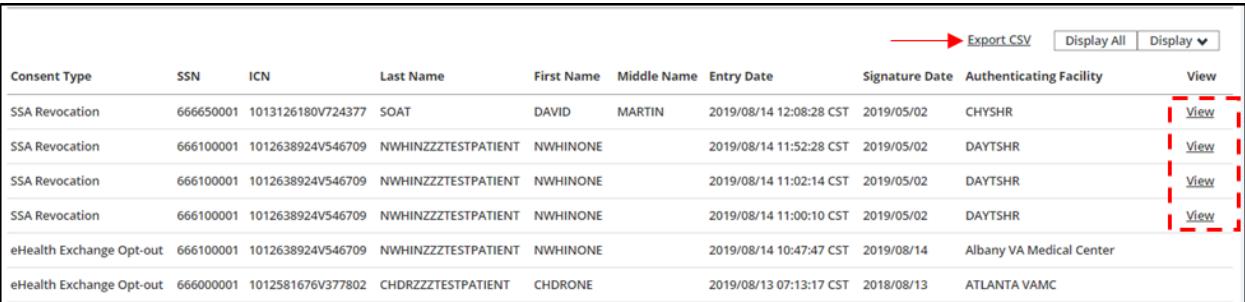
Step	Action																																																				
2.	<p>Complete the appropriate search criteria, then click Search.</p> 																																																				
3.	<p>In the returned results, the user can export the report to a .CSV file by clicking Export CSV.</p>  <table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

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

Table 15: Patient Opt-Out Detailed Report

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

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

4.13. Reports – Summary HIE and Consent Reports

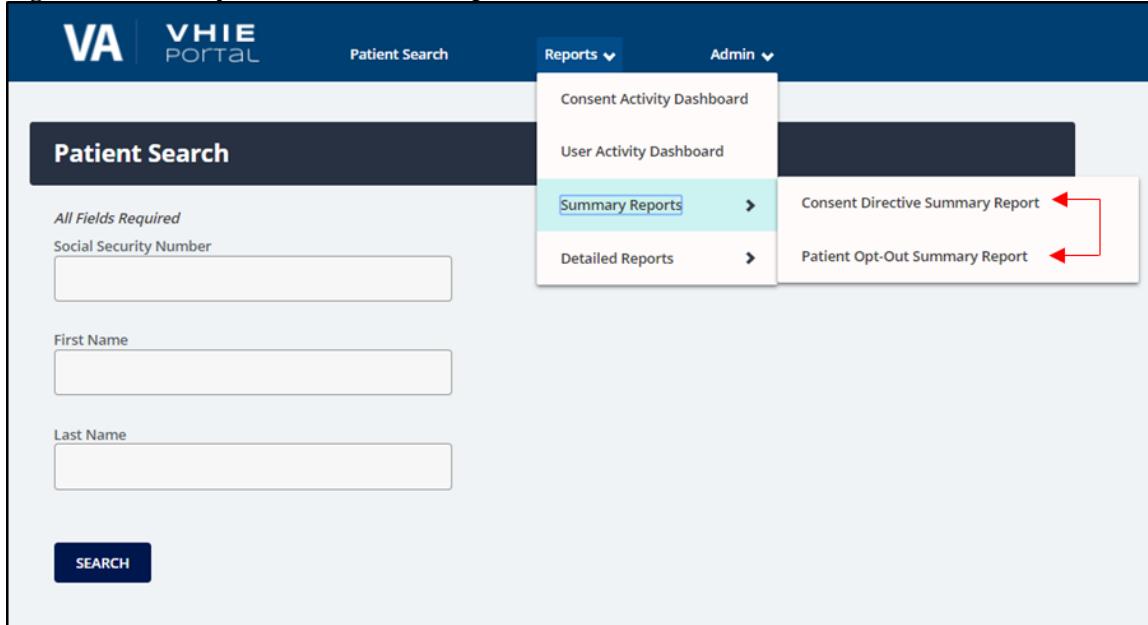
From within the VHIE Portal, a VHIE user can click the “Reports” option at the top of the webpage to select and generate the Summary HIE and Consent Reports. The Summary HIE and Consent Reports includes the following:

- Consent Directive Summary Report
- Patient Opt-Out Summary Report

Prerequisite:

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

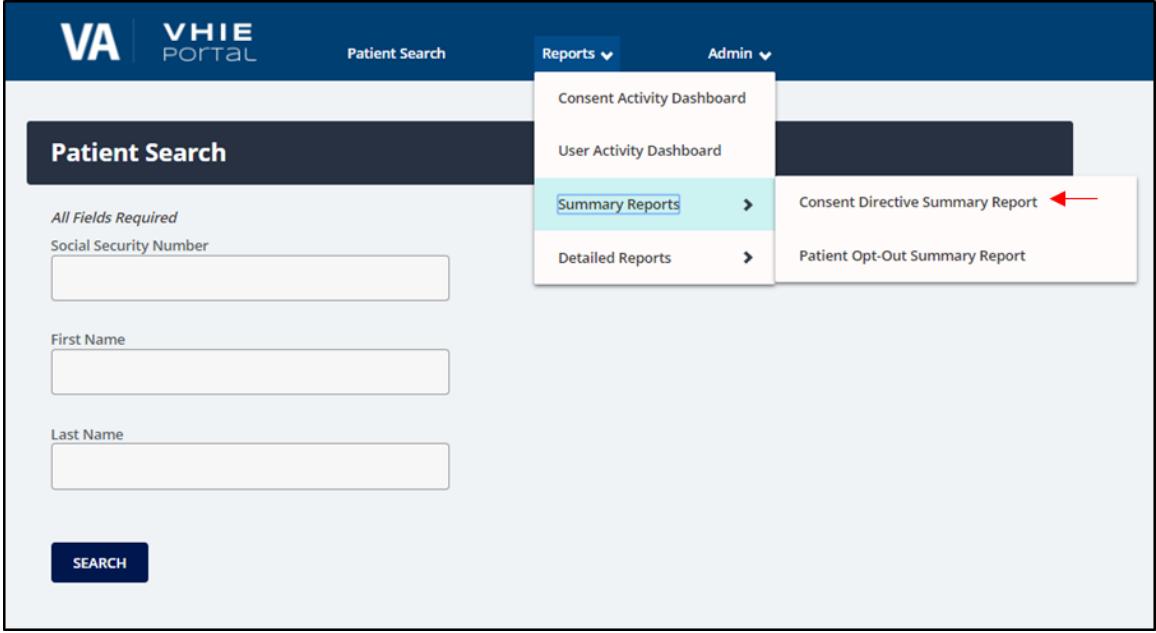
Figure 7: Summary HIE and Consent Report Menu

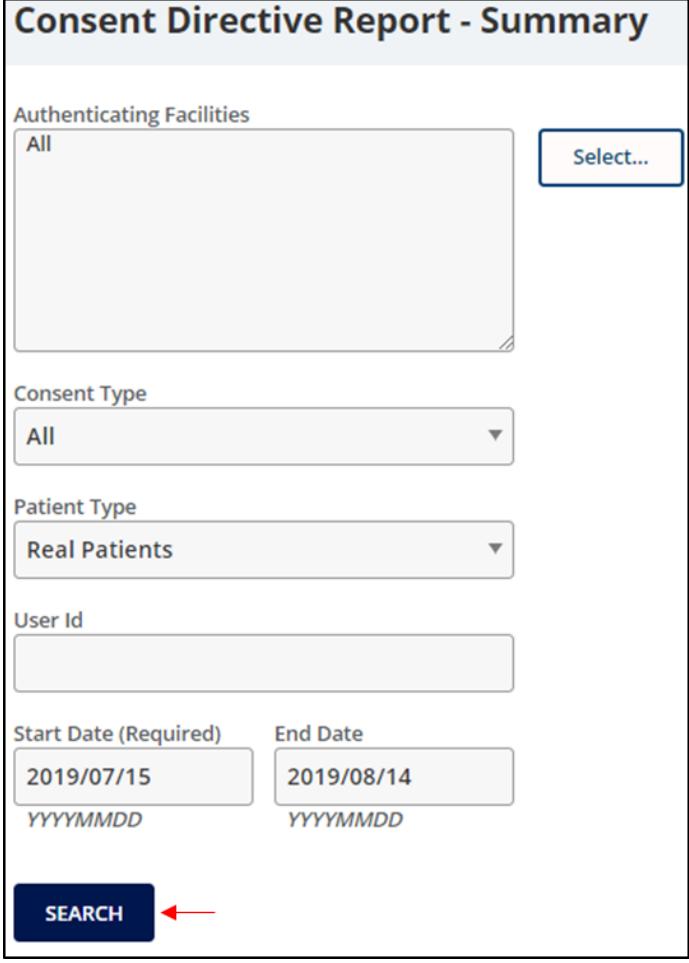


4.13.1. Consent Directive Summary Report

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

Table 16: Consent Directive Summary Report

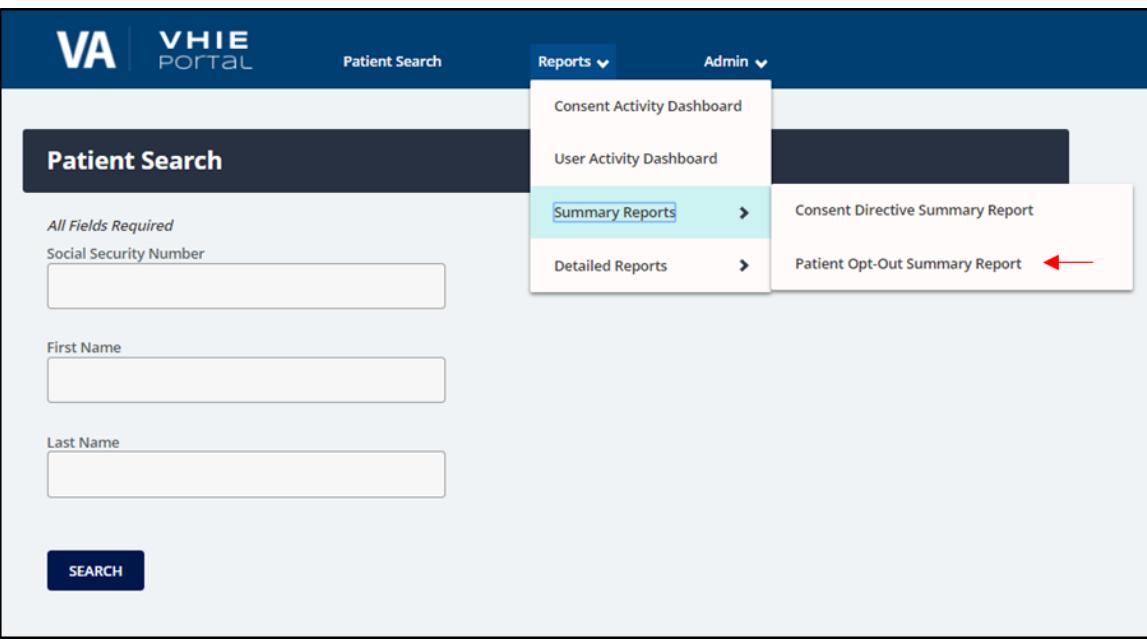
Step	Action
1.	Select Consent Directive Summary Report.  <p>The screenshot shows the VHIE Portal interface. At the top, there's a navigation bar with the VA logo, 'VHIE PORTAL', 'Patient Search', 'Reports', and 'Admin'. A dropdown menu for 'Reports' is open, showing options like 'Consent Activity Dashboard', 'User Activity Dashboard', 'Summary Reports' (which is selected and highlighted in blue), 'Detailed Reports', and 'Consent Directive Summary Report' (which has a red arrow pointing to it). Below the dropdown, there's a 'Patient Search' section with fields for 'Social Security Number', 'First Name', and 'Last Name', each with an input box and placeholder text. A 'SEARCH' button is at the bottom of this section.</p>

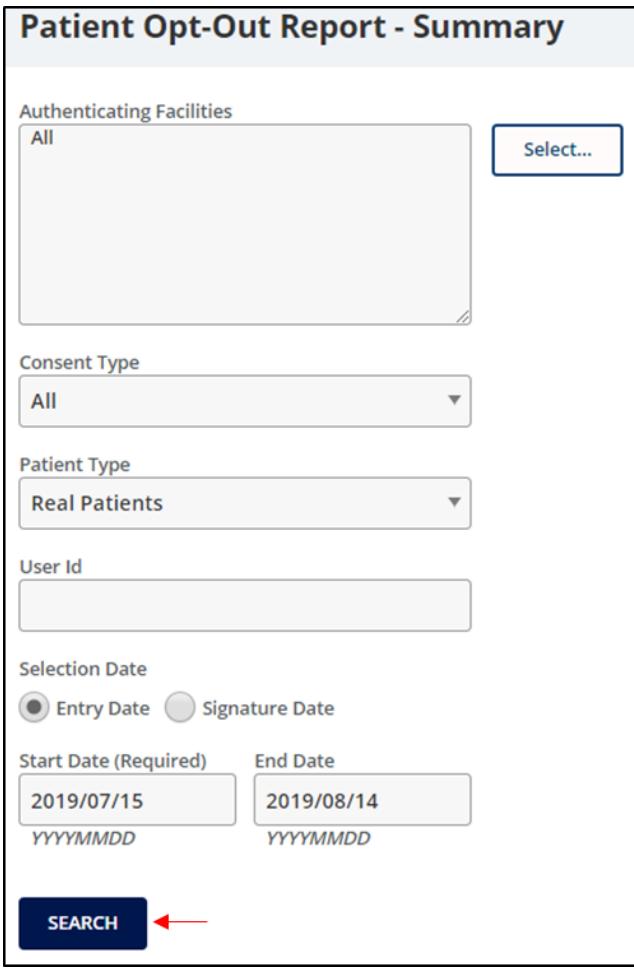
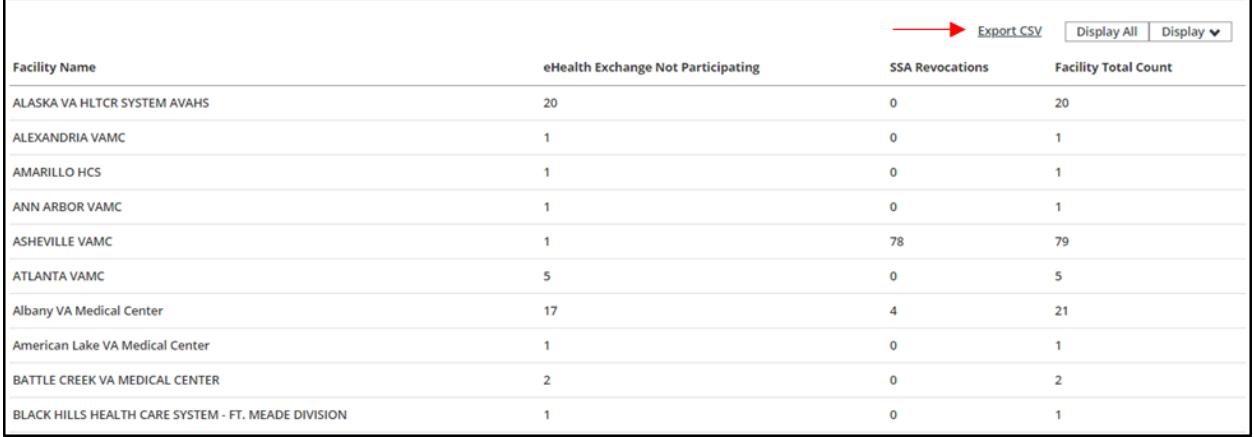
Step	Action																																													
2.	<p>Complete the appropriate search criteria, then click Search.</p> 																																													
3.	<p>In the returned results, the user can export the report to a .CSV file by clicking Export CSV.</p>  <table border="1" data-bbox="319 1360 1573 1740"> <thead> <tr> <th data-bbox="319 1360 502 1431">Authenticating Facility</th> <th data-bbox="502 1360 845 1431">eHealth Exchange Participating</th> <th data-bbox="845 1360 1188 1431">eHealth Exchange Not Participating</th> <th data-bbox="1188 1360 1367 1431">SSA Authorizations</th> <th data-bbox="1367 1360 1573 1431">SSA Revocations</th> </tr> </thead> <tbody> <tr> <td data-bbox="319 1431 502 1459">ALASKA VA HLTCR SYSTEM AVAHS</td><td data-bbox="502 1431 845 1459">7</td><td data-bbox="845 1431 1188 1459">8</td><td data-bbox="1188 1431 1367 1459">0</td><td data-bbox="1367 1431 1573 1459">0</td></tr> <tr> <td data-bbox="319 1459 502 1486">Albany VA Medical Center</td><td data-bbox="502 1459 845 1486">1</td><td data-bbox="845 1459 1188 1486">7</td><td data-bbox="1188 1459 1367 1486">6</td><td data-bbox="1367 1459 1573 1486">0</td></tr> <tr> <td data-bbox="319 1486 502 1514">ASHEVILLE VAMC</td><td data-bbox="502 1486 845 1514">0</td><td data-bbox="845 1486 1188 1514">0</td><td data-bbox="1188 1486 1367 1514">93</td><td data-bbox="1367 1486 1573 1514">0</td></tr> <tr> <td data-bbox="319 1514 502 1541">ATLANTA VAMC</td><td data-bbox="502 1514 845 1541">1</td><td data-bbox="845 1514 1188 1541">1</td><td data-bbox="1188 1514 1367 1541">0</td><td data-bbox="1367 1514 1573 1541">0</td></tr> <tr> <td data-bbox="319 1541 502 1569">BATTLE CREEK VA MEDICAL CENTER</td><td data-bbox="502 1541 845 1569">0</td><td data-bbox="845 1541 1188 1569">1</td><td data-bbox="1188 1541 1367 1569">0</td><td data-bbox="1367 1541 1573 1569">0</td></tr> <tr> <td data-bbox="319 1569 502 1596">BOISE VAMROC</td><td data-bbox="502 1569 845 1596">1</td><td data-bbox="845 1569 1188 1596">0</td><td data-bbox="1188 1569 1367 1596">0</td><td data-bbox="1367 1569 1573 1596">0</td></tr> <tr> <td data-bbox="319 1596 502 1624">BRANSON CBOC</td><td data-bbox="502 1596 845 1624">0</td><td data-bbox="845 1596 1188 1624">0</td><td data-bbox="1188 1596 1367 1624">2</td><td data-bbox="1367 1596 1573 1624">0</td></tr> <tr> <td data-bbox="319 1624 502 1651">CHYSHR</td><td data-bbox="502 1624 845 1651">6</td><td data-bbox="845 1624 1188 1651">6</td><td data-bbox="1188 1624 1367 1651">6</td><td data-bbox="1367 1624 1573 1651">0</td></tr> </tbody> </table>	Authenticating Facility	eHealth Exchange Participating	eHealth Exchange Not Participating	SSA Authorizations	SSA Revocations	ALASKA VA HLTCR SYSTEM AVAHS	7	8	0	0	Albany VA Medical Center	1	7	6	0	ASHEVILLE VAMC	0	0	93	0	ATLANTA VAMC	1	1	0	0	BATTLE CREEK VA MEDICAL CENTER	0	1	0	0	BOISE VAMROC	1	0	0	0	BRANSON CBOC	0	0	2	0	CHYSHR	6	6	6	0
Authenticating Facility	eHealth Exchange Participating	eHealth Exchange Not Participating	SSA Authorizations	SSA Revocations																																										
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BOISE VAMROC	1	0	0	0																																										
BRANSON CBOC	0	0	2	0																																										
CHYSHR	6	6	6	0																																										

4.13.2. Patient Opt-out Summary Report

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

Table 17: Patient Opt-out Summary Report

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

Step	Action																																												
2.	<p>Complete the appropriate search criteria, then click Search.</p> 																																												
3.	<p>In the returned results, the user can export the report to a .CSV file by clicking Export CSV.</p>  <table border="1"> <thead> <tr> <th data-bbox="319 1360 796 1431">Facility Name</th> <th data-bbox="796 1360 1144 1431">eHealth Exchange Not Participating</th> <th data-bbox="1144 1360 1290 1431">SSA Revocations</th> <th data-bbox="1290 1360 1573 1431">Facility Total Count</th> </tr> </thead> <tbody> <tr> <td data-bbox="319 1431 796 1459">ALASKA VA HLTCR SYSTEM AVAHS</td> <td data-bbox="796 1431 1144 1459">20</td> <td data-bbox="1144 1431 1290 1459">0</td> <td data-bbox="1290 1431 1573 1459">20</td> </tr> <tr> <td data-bbox="319 1459 796 1486">ALEXANDRIA VAMC</td> <td data-bbox="796 1459 1144 1486">1</td> <td data-bbox="1144 1459 1290 1486">0</td> <td data-bbox="1290 1459 1573 1486">1</td> </tr> <tr> <td data-bbox="319 1486 796 1514">AMARILLO HCS</td> <td data-bbox="796 1486 1144 1514">1</td> <td data-bbox="1144 1486 1290 1514">0</td> <td data-bbox="1290 1486 1573 1514">1</td> </tr> <tr> <td data-bbox="319 1514 796 1541">ANN ARBOR VAMC</td> <td data-bbox="796 1514 1144 1541">1</td> <td data-bbox="1144 1514 1290 1541">0</td> <td data-bbox="1290 1514 1573 1541">1</td> </tr> <tr> <td data-bbox="319 1541 796 1569">ASHEVILLE VAMC</td> <td data-bbox="796 1541 1144 1569">1</td> <td data-bbox="1144 1541 1290 1569">78</td> <td data-bbox="1290 1541 1573 1569">79</td> </tr> <tr> <td data-bbox="319 1569 796 1596">ATLANTA VAMC</td> <td data-bbox="796 1569 1144 1596">5</td> <td data-bbox="1144 1569 1290 1596">0</td> <td data-bbox="1290 1569 1573 1596">5</td> </tr> <tr> <td data-bbox="319 1596 796 1624">Albany VA Medical Center</td> <td data-bbox="796 1596 1144 1624">17</td> <td data-bbox="1144 1596 1290 1624">4</td> <td data-bbox="1290 1596 1573 1624">21</td> </tr> <tr> <td data-bbox="319 1624 796 1651">American Lake VA Medical Center</td> <td data-bbox="796 1624 1144 1651">1</td> <td data-bbox="1144 1624 1290 1651">0</td> <td data-bbox="1290 1624 1573 1651">1</td> </tr> <tr> <td data-bbox="319 1651 796 1679">BATTLE CREEK VA MEDICAL CENTER</td> <td data-bbox="796 1651 1144 1679">2</td> <td data-bbox="1144 1651 1290 1679">0</td> <td data-bbox="1290 1651 1573 1679">2</td> </tr> <tr> <td data-bbox="319 1679 796 1706">BLACK HILLS HEALTH CARE SYSTEM - FT. MEADE DIVISION</td> <td data-bbox="796 1679 1144 1706">1</td> <td data-bbox="1144 1679 1290 1706">0</td> <td data-bbox="1290 1679 1573 1706">1</td> </tr> </tbody> </table>	Facility Name	eHealth Exchange Not Participating	SSA Revocations	Facility Total Count	ALASKA VA HLTCR SYSTEM AVAHS	20	0	20	ALEXANDRIA VAMC	1	0	1	AMARILLO HCS	1	0	1	ANN ARBOR VAMC	1	0	1	ASHEVILLE VAMC	1	78	79	ATLANTA VAMC	5	0	5	Albany VA Medical Center	17	4	21	American Lake VA Medical Center	1	0	1	BATTLE CREEK VA MEDICAL CENTER	2	0	2	BLACK HILLS HEALTH CARE SYSTEM - FT. MEADE DIVISION	1	0	1
Facility Name	eHealth Exchange Not Participating	SSA Revocations	Facility Total Count																																										
ALASKA VA HLTCR SYSTEM AVAHS	20	0	20																																										
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BATTLE CREEK VA MEDICAL CENTER	2	0	2																																										
BLACK HILLS HEALTH CARE SYSTEM - FT. MEADE DIVISION	1	0	1																																										

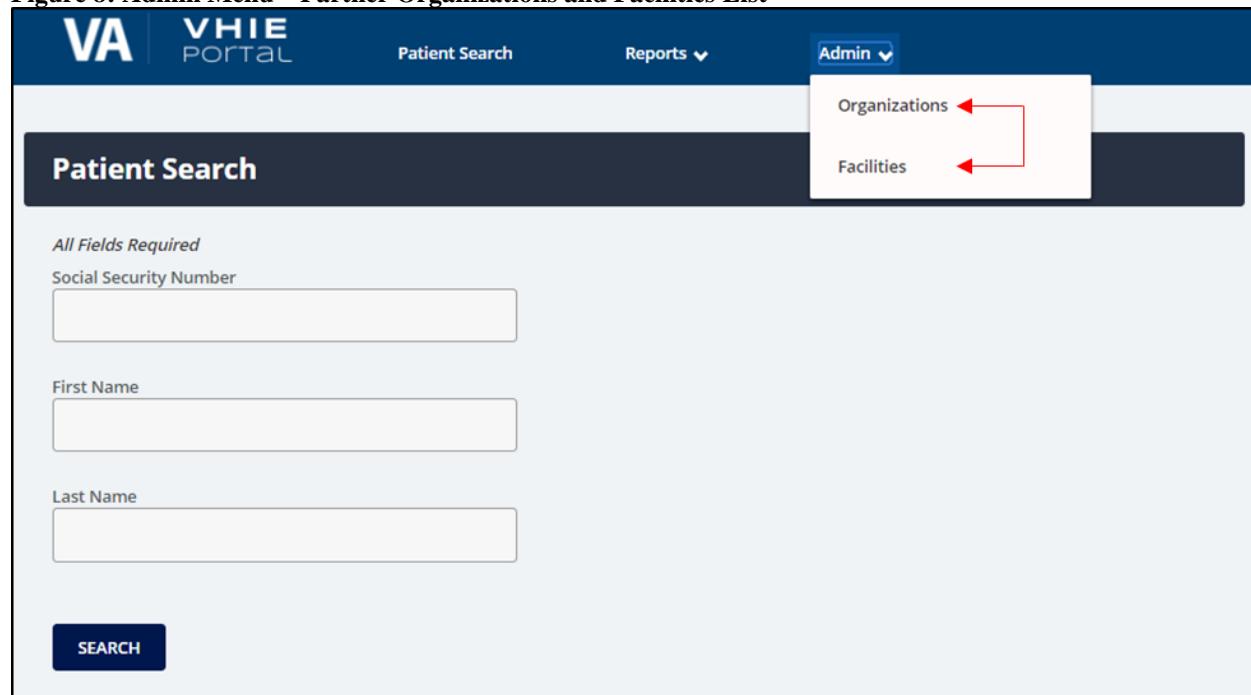
4.14. Admin Menu – Partner Organizations and Facilities List

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

Prerequisite:

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

Figure 8: Admin Menu – Partner Organizations and Facilities List



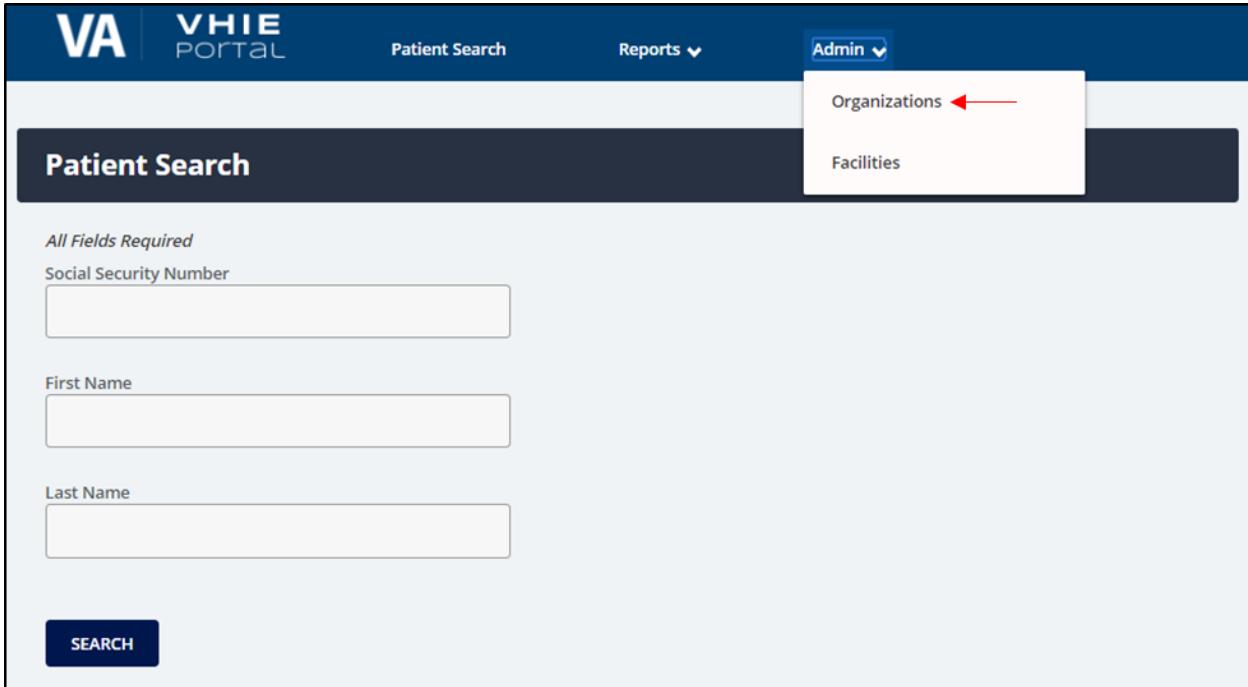
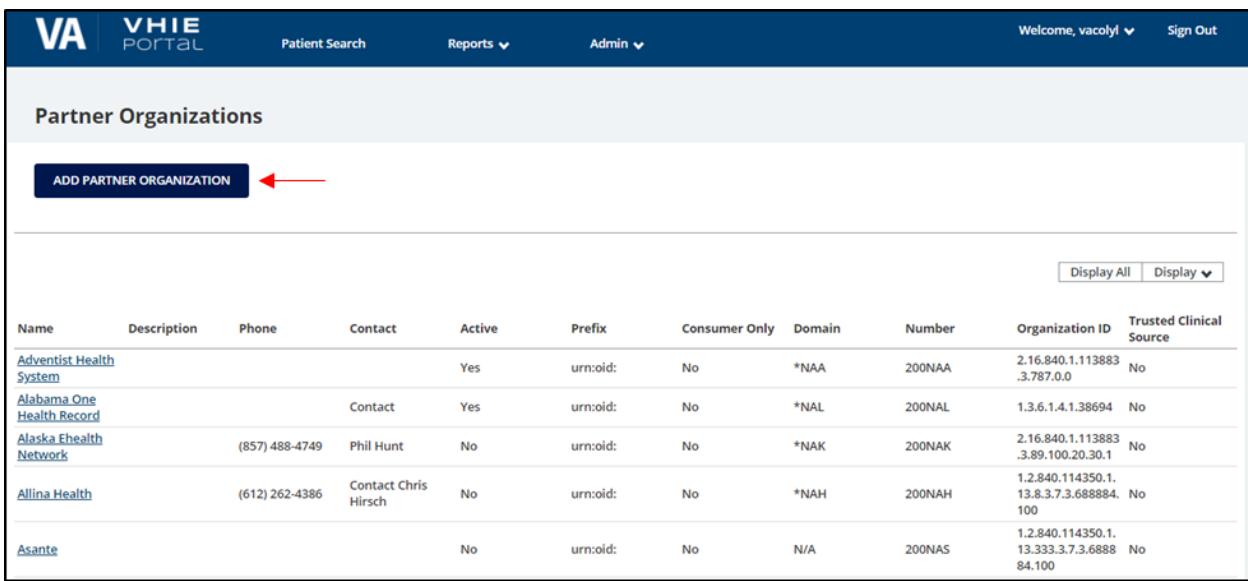
4.14.1. Access or Modify Partner Organizations List

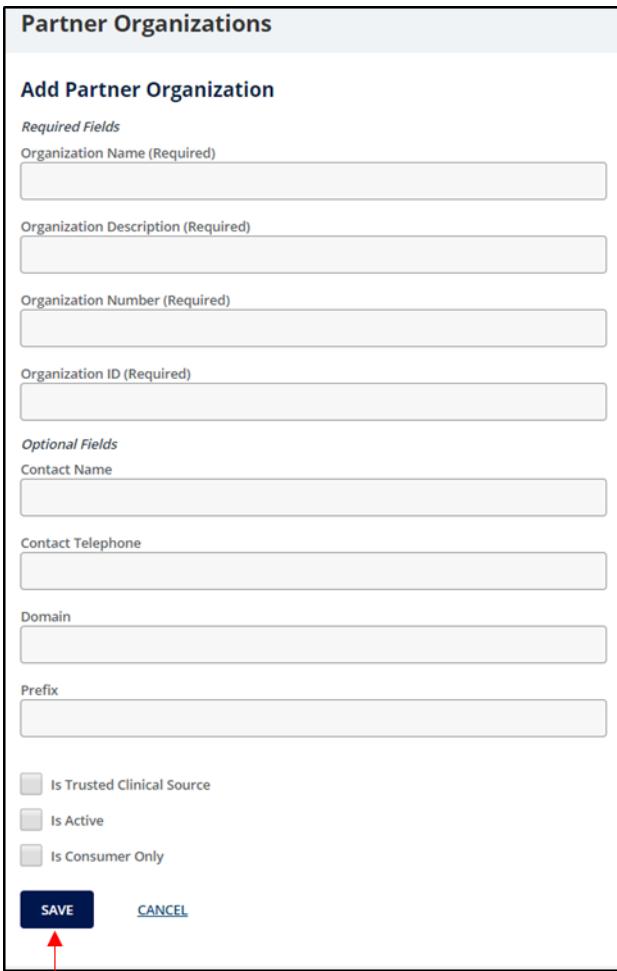
The VHIE admin user can access the list of Partner Organizations to view, edit, delete, or add new organizations.

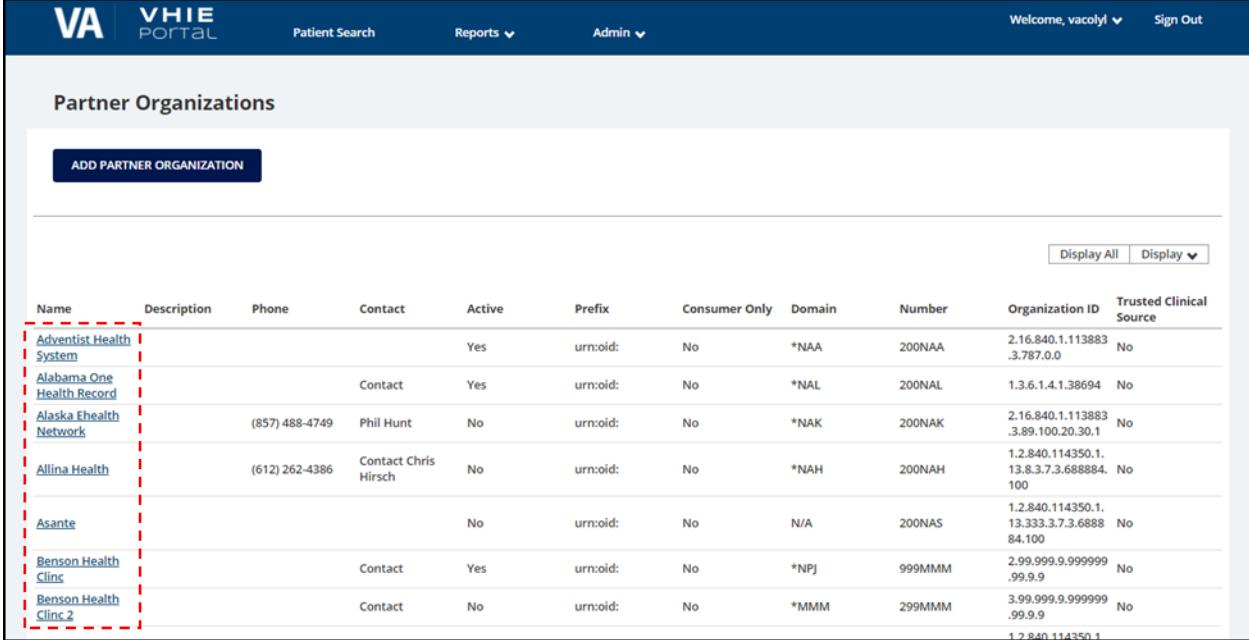
Prerequisite:

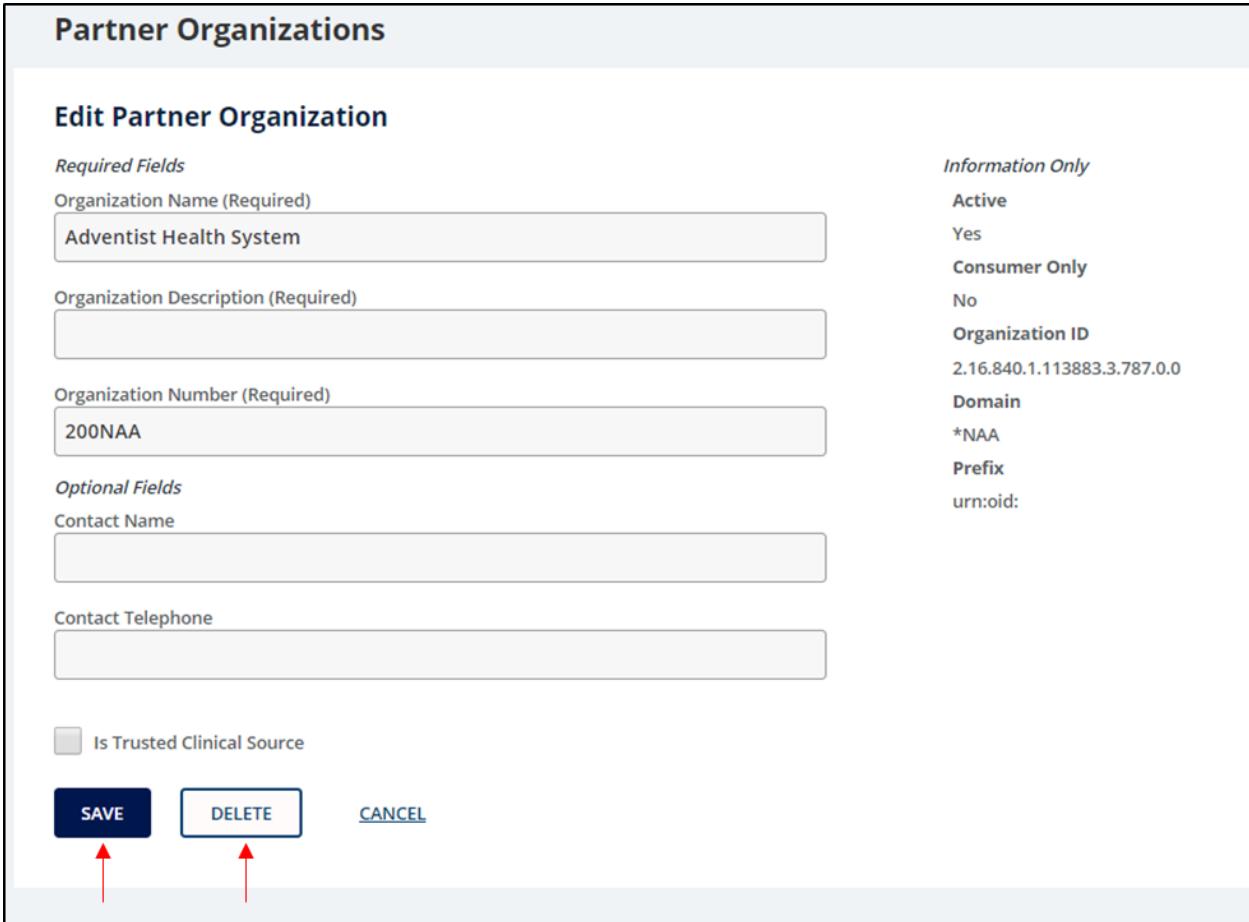
- The user has logged in via SSOi or another VA-approved method for authentication.
- The user is provided with elevated admin privileges to access and modify the list of Partner Organizations.

Table 18: Access or Modify Partner Organizations List

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

Step	Action																																																																																															
4.	<p>To edit or delete an existing Partner Organization, click on the targeted organization name.</p>  <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name</th> <th>Description</th> <th>Phone</th> <th>Contact</th> <th>Active</th> <th>Prefix</th> <th>Consumer Only</th> <th>Domain</th> <th>Number</th> <th>Organization ID</th> <th>Trusted Clinical Source</th> </tr> </thead> <tbody> <tr> <td>Adventist Health System</td> <td></td> <td></td> <td></td> <td>Yes</td> <td>urn:oid:</td> <td>No</td> <td>*NAA</td> <td>200NAA</td> <td>2.16.840.1.113883 3.787.0.0</td> <td>No</td> </tr> <tr> <td>Alabama One Health Record</td> <td></td> <td></td> <td>Contact</td> <td>Yes</td> <td>urn:oid:</td> <td>No</td> <td>*NAL</td> <td>200NAL</td> <td>1.3.6.1.4.1.38694</td> <td>No</td> </tr> <tr> <td>Alaska Ehealth Network</td> <td>(857) 488-4749</td> <td>Phil Hunt</td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>*NAK</td> <td>200NAK</td> <td>2.16.840.1.113883 3.89.100.20.30.1</td> <td>No</td> </tr> <tr> <td>Allina Health</td> <td>(612) 262-4386</td> <td>Contact Chris Hirsch</td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>*NAH</td> <td>200NAH</td> <td>1.2.840.114350.1. 13.8.3.7.3.68884. No 100</td> <td>No</td> </tr> <tr> <td>Asante</td> <td></td> <td></td> <td></td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>N/A</td> <td>200NAS</td> <td>1.2.840.114350.1. 13.333.3.7.3.6888 84.100</td> <td>No</td> </tr> <tr> <td>Benson Health Clinic</td> <td></td> <td>Contact</td> <td>Yes</td> <td>urn:oid:</td> <td>No</td> <td>*NPJ</td> <td>999MMM</td> <td>2.99.999.9.999999 .99.9.9</td> <td>No</td> </tr> <tr> <td>Benson Health Clinic 2</td> <td></td> <td>Contact</td> <td>No</td> <td>urn:oid:</td> <td>No</td> <td>*MMM</td> <td>299MMM</td> <td>3.99.999.9.999999 .99.9.9</td> <td>No</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>1.2.840.114350.1</td> <td></td> </tr> </tbody> </table>	Name	Description	Phone	Contact	Active	Prefix	Consumer Only	Domain	Number	Organization ID	Trusted Clinical Source	Adventist Health System				Yes	urn:oid:	No	*NAA	200NAA	2.16.840.1.113883 3.787.0.0	No	Alabama One Health Record			Contact	Yes	urn:oid:	No	*NAL	200NAL	1.3.6.1.4.1.38694	No	Alaska Ehealth Network	(857) 488-4749	Phil Hunt	No	urn:oid:	No	*NAK	200NAK	2.16.840.1.113883 3.89.100.20.30.1	No	Allina Health	(612) 262-4386	Contact Chris Hirsch	No	urn:oid:	No	*NAH	200NAH	1.2.840.114350.1. 13.8.3.7.3.68884. No 100	No	Asante				No	urn:oid:	No	N/A	200NAS	1.2.840.114350.1. 13.333.3.7.3.6888 84.100	No	Benson Health Clinic		Contact	Yes	urn:oid:	No	*NPJ	999MMM	2.99.999.9.999999 .99.9.9	No	Benson Health Clinic 2		Contact	No	urn:oid:	No	*MMM	299MMM	3.99.999.9.999999 .99.9.9	No										1.2.840.114350.1	
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Step	Action												
5.	<p>Complete the appropriate required fields and click Save to edit the organization or click Delete to remove the organization from the list.</p>  <table border="1" data-bbox="360 487 1511 1100"> <thead> <tr> <th colspan="2"><i>Information Only</i></th> </tr> </thead> <tbody> <tr> <td>Active</td> <td>Yes</td> </tr> <tr> <td>Consumer Only</td> <td>No</td> </tr> <tr> <td>Organization ID</td> <td>2.16.840.1.113883.3.787.0.0</td> </tr> <tr> <td>Domain</td> <td>*NAA</td> </tr> <tr> <td>Prefix</td> <td>urn:oid:</td> </tr> </tbody> </table>	<i>Information Only</i>		Active	Yes	Consumer Only	No	Organization ID	2.16.840.1.113883.3.787.0.0	Domain	*NAA	Prefix	urn:oid:
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Organization ID	2.16.840.1.113883.3.787.0.0												
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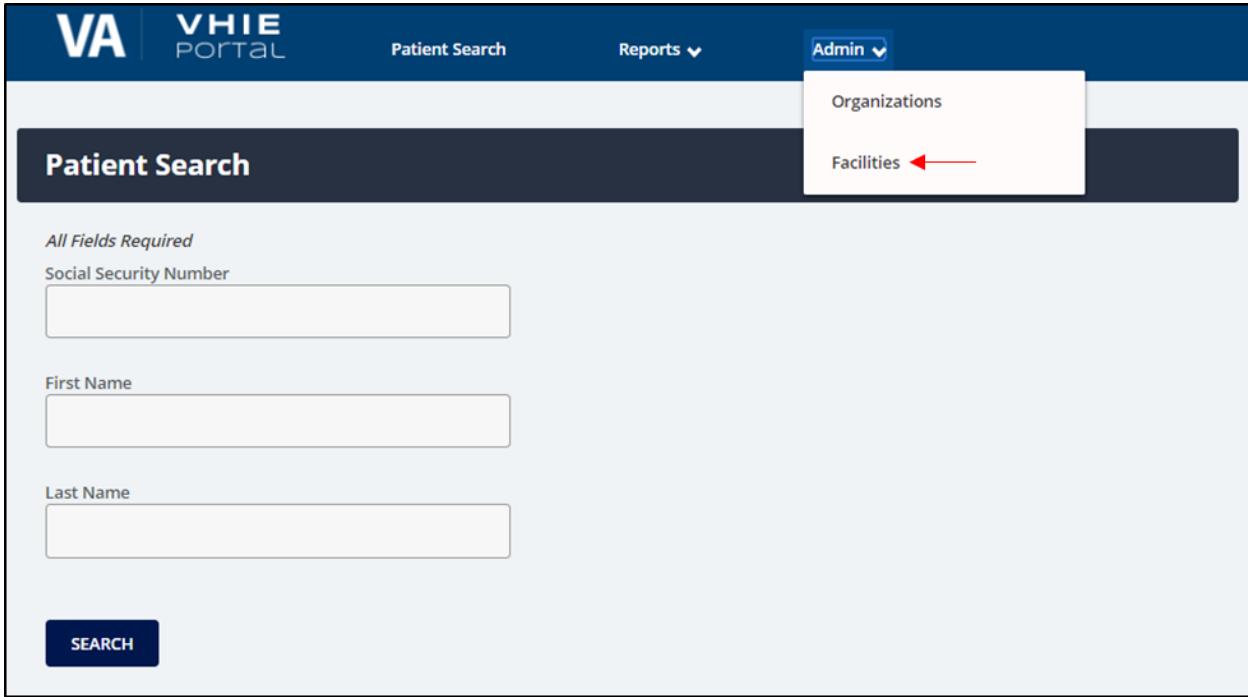
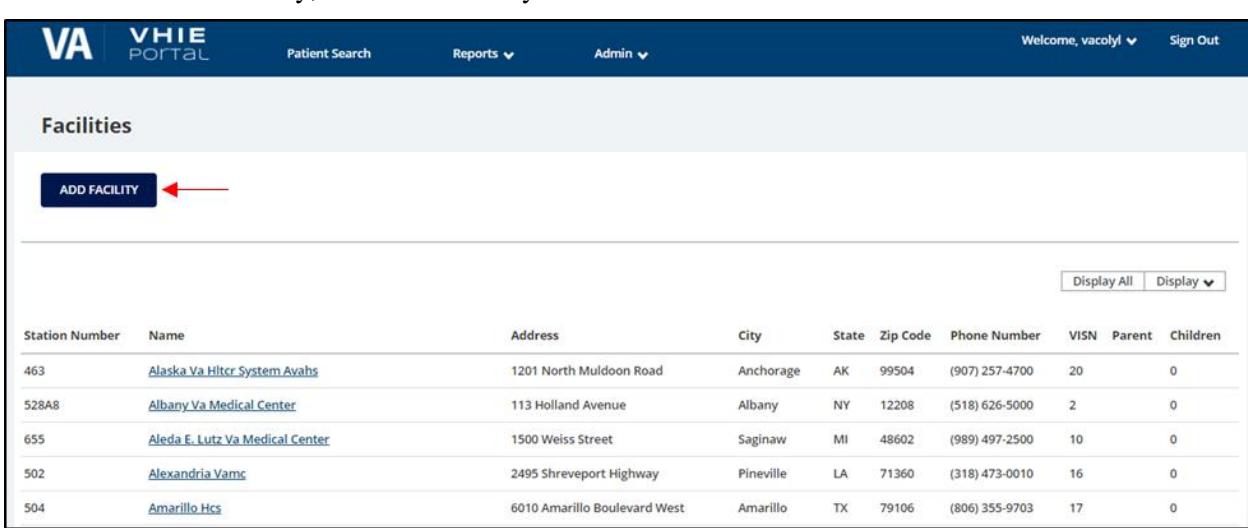
4.14.2. Access or Modify Facilities List

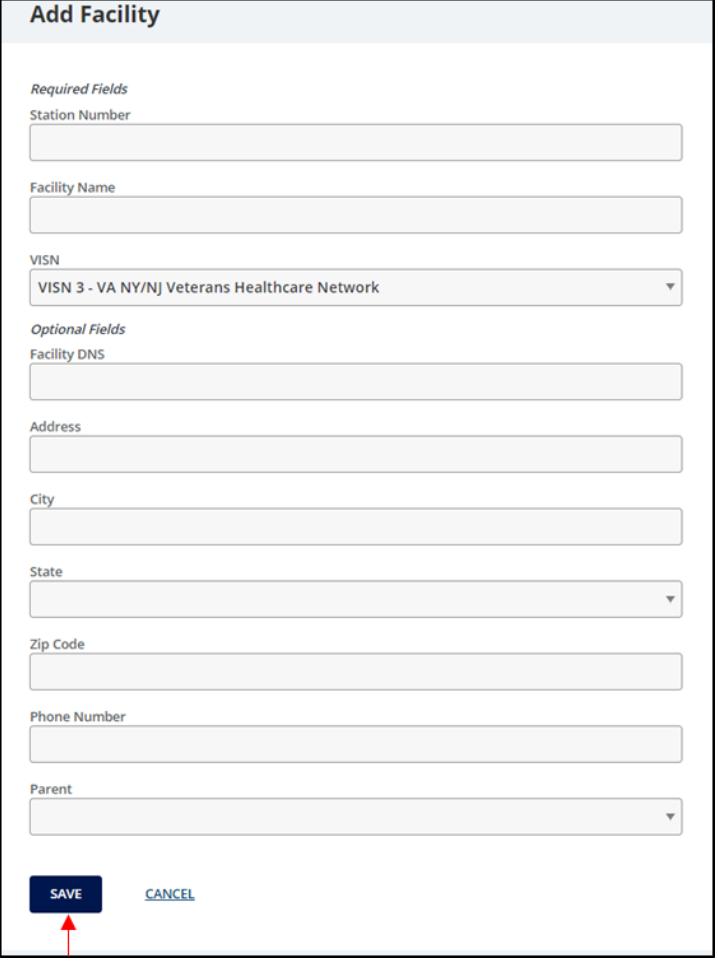
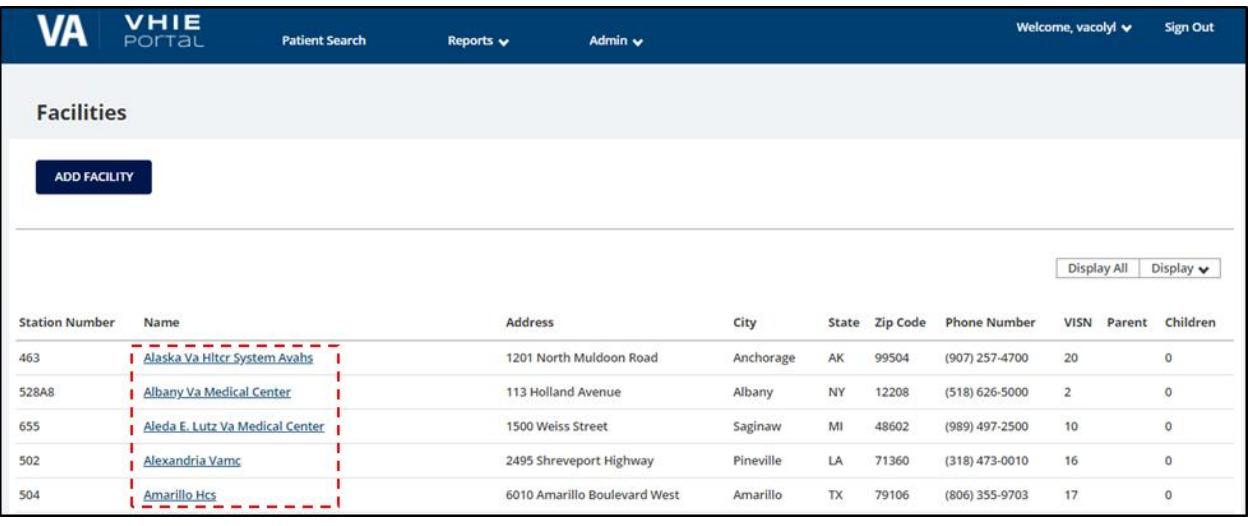
The VHIE admin user can access the list of VA Facilities to view, edit, delete, or add new facilities.

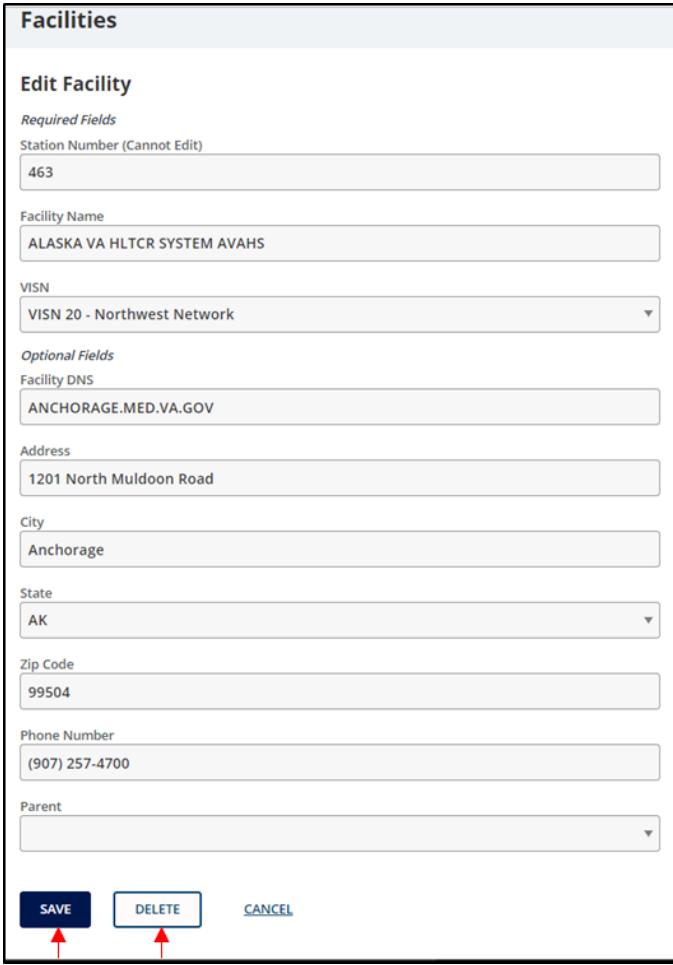
Prerequisite:

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

Table 19: Access or Modify Facilities List

Step	Action																																																												
1.	<p>Select Facilities.</p> 																																																												
2.	<p>To add a new VA Facility, click Add Facility.</p>  <table border="1" data-bbox="334 1425 1558 1615"> <thead> <tr> <th>Station Number</th> <th>Name</th> <th>Address</th> <th>City</th> <th>State</th> <th>Zip Code</th> <th>Phone Number</th> <th>VISN</th> <th>Parent</th> <th>Children</th> </tr> </thead> <tbody> <tr> <td>463</td> <td>Alaska Va Hlthr System Avahs</td> <td>1201 North Muldoon Road</td> <td>Anchorage</td> <td>AK</td> <td>99504</td> <td>(907) 257-4700</td> <td>20</td> <td>0</td> <td></td> </tr> <tr> <td>528A8</td> <td>Albany Va Medical Center</td> <td>113 Holland Avenue</td> <td>Albany</td> <td>NY</td> <td>12208</td> <td>(518) 626-5000</td> <td>2</td> <td>0</td> <td></td> </tr> <tr> <td>655</td> <td>Aleda E. Lutz Va Medical Center</td> <td>1500 Weiss Street</td> <td>Saginaw</td> <td>MI</td> <td>48602</td> <td>(989) 497-2500</td> <td>10</td> <td>0</td> <td></td> </tr> <tr> <td>502</td> <td>Alexandria Vamc</td> <td>2495 Shreveport Highway</td> <td>Pineville</td> <td>LA</td> <td>71360</td> <td>(318) 473-0010</td> <td>16</td> <td>0</td> <td></td> </tr> <tr> <td>504</td> <td>Amarillo Hcs</td> <td>6010 Amarillo Boulevard West</td> <td>Amarillo</td> <td>TX</td> <td>79106</td> <td>(806) 355-9703</td> <td>17</td> <td>0</td> <td></td> </tr> </tbody> </table>	Station Number	Name	Address	City	State	Zip Code	Phone Number	VISN	Parent	Children	463	Alaska Va Hlthr System Avahs	1201 North Muldoon Road	Anchorage	AK	99504	(907) 257-4700	20	0		528A8	Albany Va Medical Center	113 Holland Avenue	Albany	NY	12208	(518) 626-5000	2	0		655	Aleda E. Lutz Va Medical Center	1500 Weiss Street	Saginaw	MI	48602	(989) 497-2500	10	0		502	Alexandria Vamc	2495 Shreveport Highway	Pineville	LA	71360	(318) 473-0010	16	0		504	Amarillo Hcs	6010 Amarillo Boulevard West	Amarillo	TX	79106	(806) 355-9703	17	0	
Station Number	Name	Address	City	State	Zip Code	Phone Number	VISN	Parent	Children																																																				
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4.	<p>To edit or delete an existing VA Facility, click on the targeted facility name.</p>  <table border="1" data-bbox="331 1664 1563 1862"> <thead> <tr> <th>Station Number</th> <th>Name</th> <th>Address</th> <th>City</th> <th>State</th> <th>Zip Code</th> <th>Phone Number</th> <th>VISN</th> <th>Parent</th> <th>Children</th> </tr> </thead> <tbody> <tr> <td>463</td> <td>Alaska Va Hitler System Avahs</td> <td>1201 North Muldoon Road</td> <td>Anchorage</td> <td>AK</td> <td>99504</td> <td>(907) 257-4700</td> <td>20</td> <td>0</td> <td></td> </tr> <tr> <td>528A8</td> <td>Albany Va Medical Center</td> <td>113 Holland Avenue</td> <td>Albany</td> <td>NY</td> <td>12208</td> <td>(518) 626-5000</td> <td>2</td> <td>0</td> <td></td> </tr> <tr> <td>655</td> <td>Aleda E. Lutz Va Medical Center</td> <td>1500 Weiss Street</td> <td>Saginaw</td> <td>MI</td> <td>48602</td> <td>(989) 497-2500</td> <td>10</td> <td>0</td> <td></td> </tr> <tr> <td>502</td> <td>Alexandria Vamc</td> <td>2495 Shreveport Highway</td> <td>Pineville</td> <td>LA</td> <td>71360</td> <td>(318) 473-0010</td> <td>16</td> <td>0</td> <td></td> </tr> <tr> <td>504</td> <td>Amarillo Hcs</td> <td>6010 Amarillo Boulevard West</td> <td>Amarillo</td> <td>TX</td> <td>79106</td> <td>(806) 355-9703</td> <td>17</td> <td>0</td> <td></td> </tr> </tbody> </table>	Station Number	Name	Address	City	State	Zip Code	Phone Number	VISN	Parent	Children	463	Alaska Va Hitler System Avahs	1201 North Muldoon Road	Anchorage	AK	99504	(907) 257-4700	20	0		528A8	Albany Va Medical Center	113 Holland Avenue	Albany	NY	12208	(518) 626-5000	2	0		655	Aleda E. Lutz Va Medical Center	1500 Weiss Street	Saginaw	MI	48602	(989) 497-2500	10	0		502	Alexandria Vamc	2495 Shreveport Highway	Pineville	LA	71360	(318) 473-0010	16	0		504	Amarillo Hcs	6010 Amarillo Boulevard West	Amarillo	TX	79106	(806) 355-9703	17	0	
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Step	Action
5.	<p>Complete the appropriate required fields and click Save to edit the facility or click Delete to remove the facility from the list.</p>  <p>The screenshot shows the 'Edit Facility' page. It includes fields for Station Number (463), Facility Name (ALASKA VA HLTCR SYSTEM AVAHS), VISN (VISN 20 - Northwest Network), Facility DNS (ANCHORAGE.MED.VA.GOV), Address (1201 North Muldoon Road), City (Anchorage), State (AK), Zip Code (99504), and Phone Number ((907) 257-4700). There is also a Parent dropdown field. At the bottom are three buttons: a blue 'SAVE' button with a red arrow pointing to it, a blue 'DELETE' button with a red arrow pointing to it, and a blue 'CANCEL' button.</p>

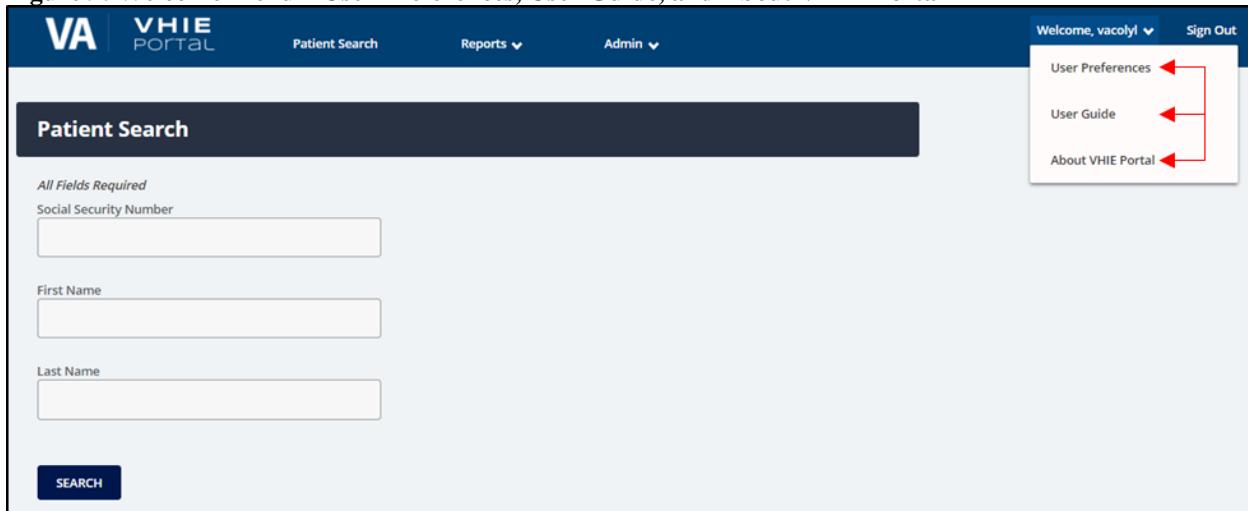
4.15. Welcome Menu – User Preferences, User Guide, and About VHIE Portal

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

Prerequisite:

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

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



4.15.1. Set or Update User’s Default Facility

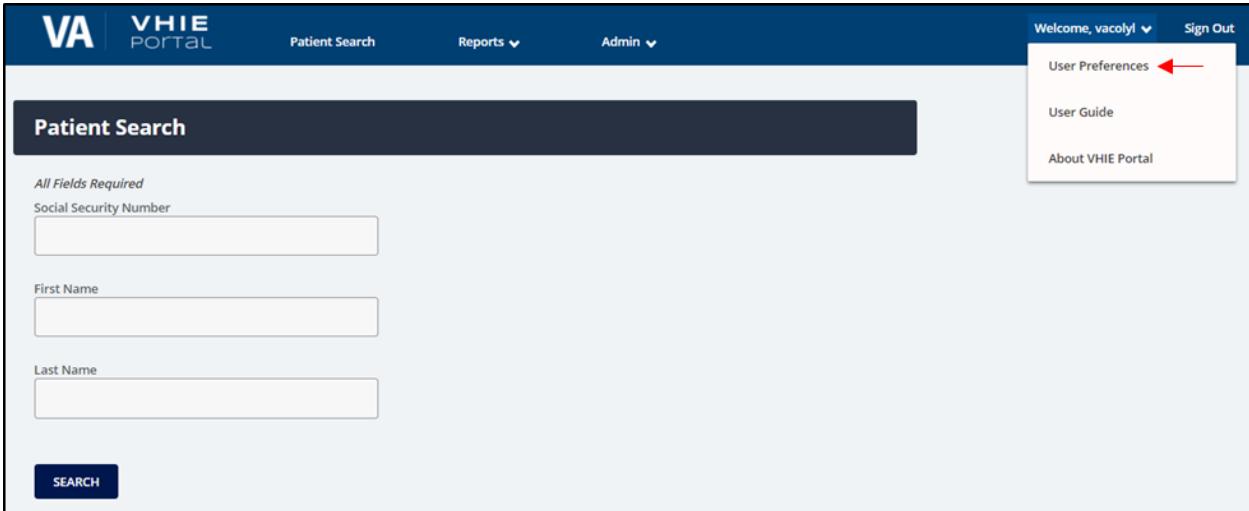
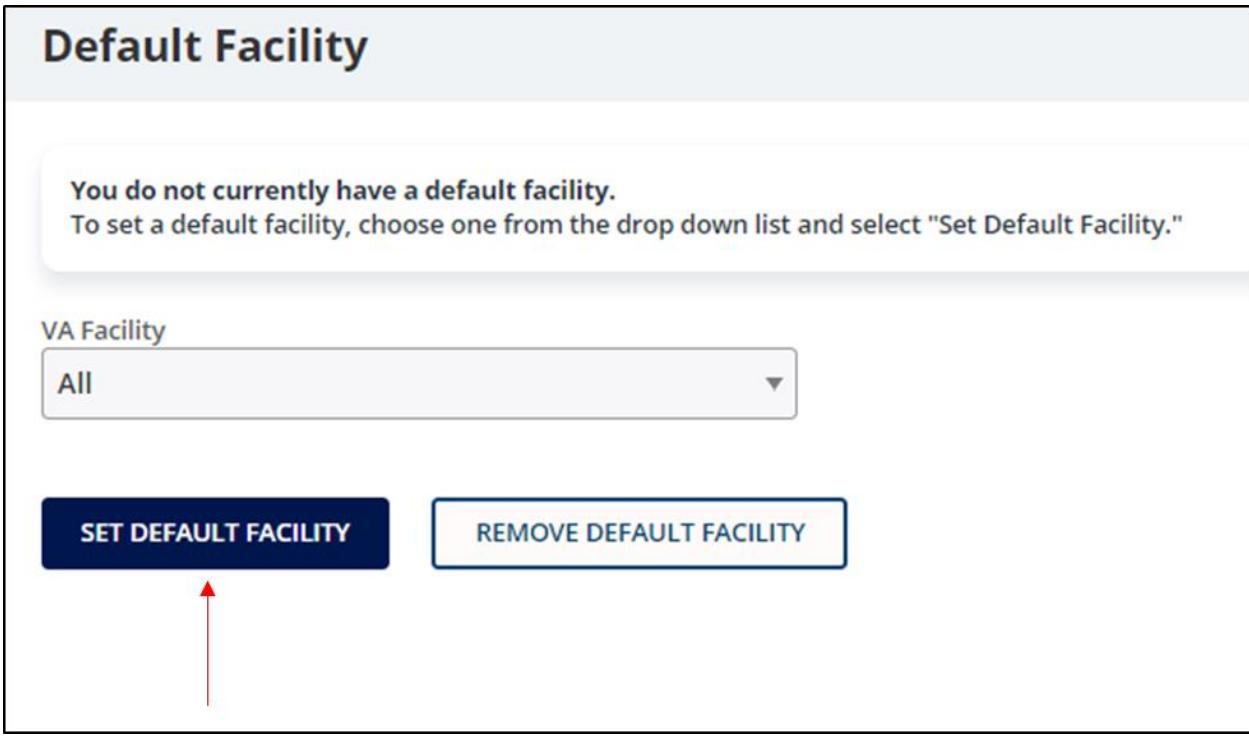
The VHIE user can set or remove their default facility from the notification message at the VHIE Landing Page or by selecting “User Preferences” from the welcome menu, under the username.

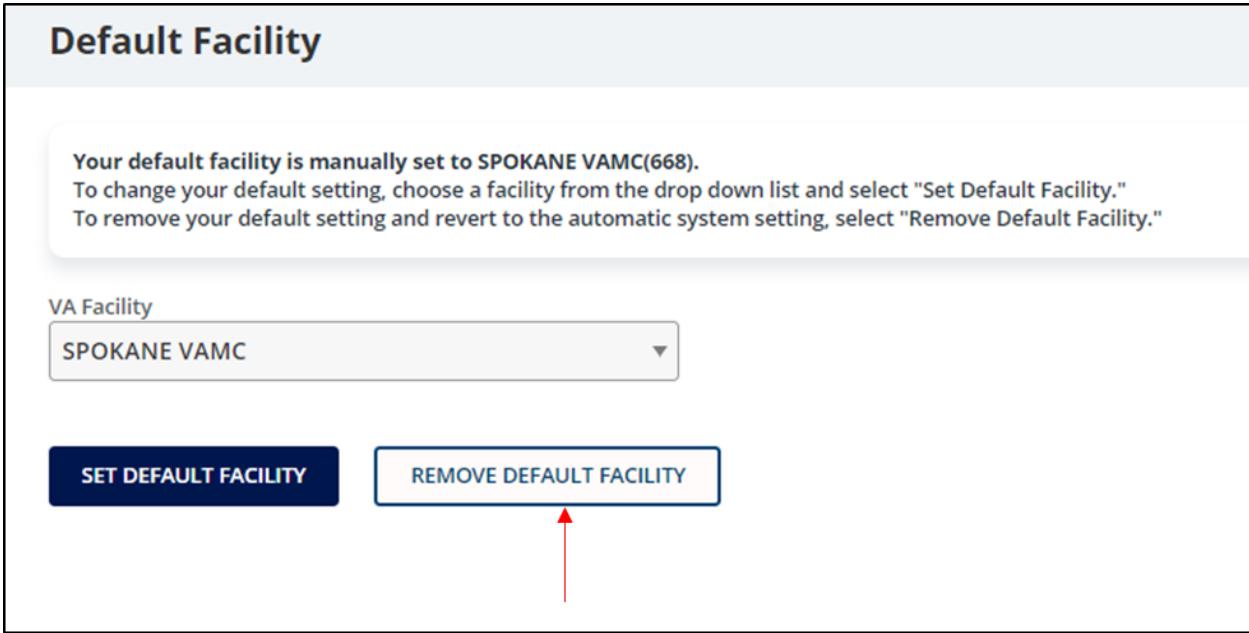
Prerequisite:

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

Table 20: Set or Update User's Default Facility

Step	Action
1.	<p>If the VHIE user has not set a default facility, a notification message will display at the Landing Page after login.</p> <p>Note: The notification message will continue to display at the Landing Page until the VHIE user has set a default facility.</p>  <p>The screenshot shows the VHIE Portal homepage. At the top right, there is a blue banner with white text that reads "You do not have a default facility set. Would you like to set one now?" with two buttons: "Yes" and "Not Now". A red arrow points from the text in the question part of the banner to the "Yes" button. The rest of the page features the VHIE logo, a background image of military personnel holding flags, and a navigation bar with links like Patient Search, Reports, Admin, Welcome, vacoly, Sign Out, and Quick Links (Patient Search, User Preferences, Consent Activity Dashboard, User Activity Dashboard).</p>

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

Step	Action
4.	<p>After setting a default facility, the VHIE user can set a new default facility at any time or remove the current default facility by clicking Remove Default Facility.</p> 

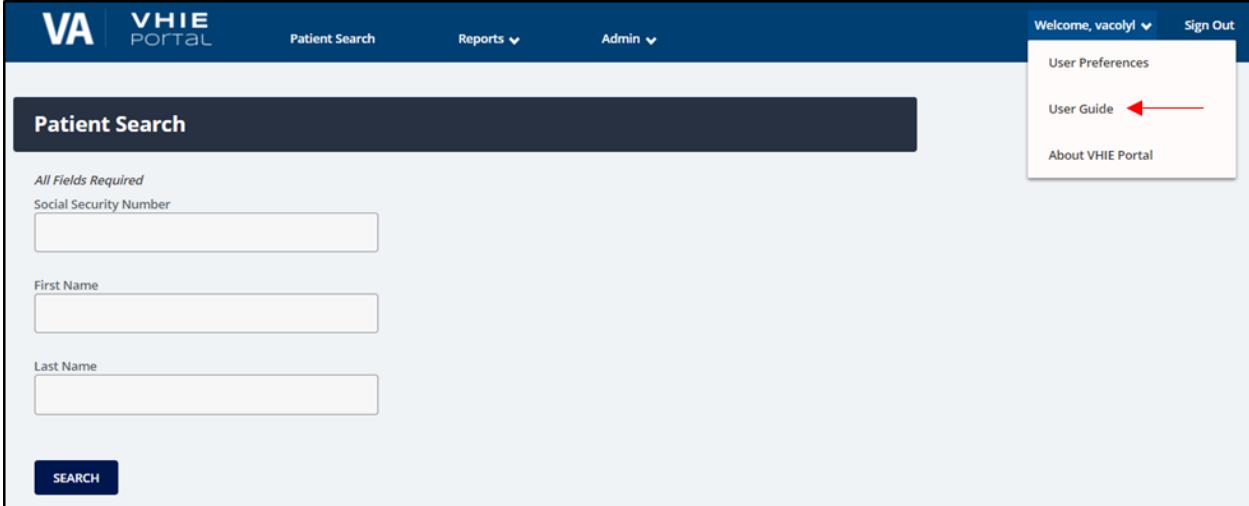
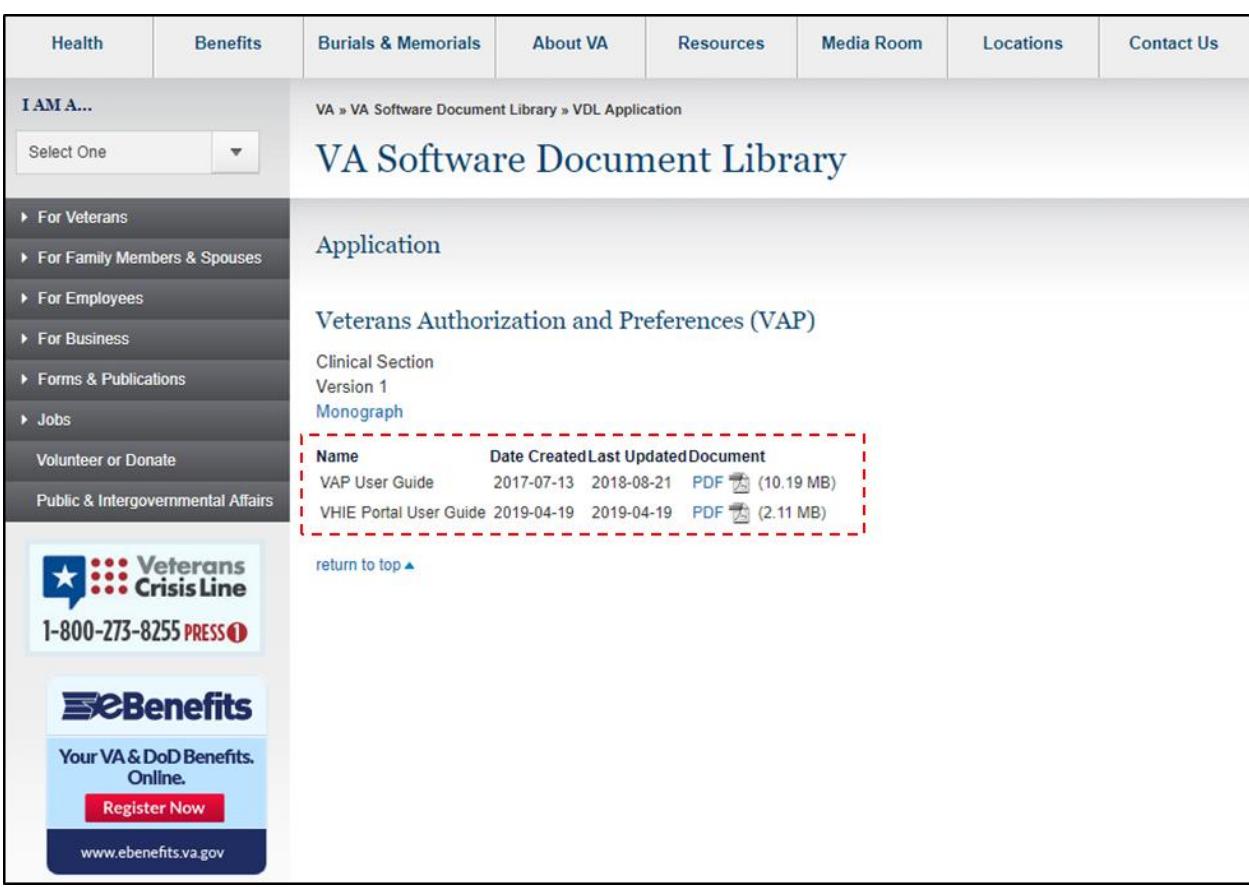
4.15.2. Access User Guide

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

Prerequisite:

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

Table 21: Access User Guide

Step	Action												
1.	<p>From the Welcome Menu, select User Guide.</p> 												
2.	<p>The VHIE user is automatically re-directed to the VA Software Document Library to download the PDF file of the applicable VHIE Portal User Guide.</p>  <table border="1" data-bbox="620 1393 1158 1488"> <thead> <tr> <th>Name</th> <th>Date Created</th> <th>Last Updated</th> <th>Document</th> </tr> </thead> <tbody> <tr> <td>VAP User Guide</td> <td>2017-07-13</td> <td>2018-08-21</td> <td>PDF (10.19 MB)</td> </tr> <tr> <td>VHIE Portal User Guide</td> <td>2019-04-19</td> <td>2019-04-19</td> <td>PDF (2.11 MB)</td> </tr> </tbody> </table>	Name	Date Created	Last Updated	Document	VAP User Guide	2017-07-13	2018-08-21	PDF (10.19 MB)	VHIE Portal User Guide	2019-04-19	2019-04-19	PDF (2.11 MB)
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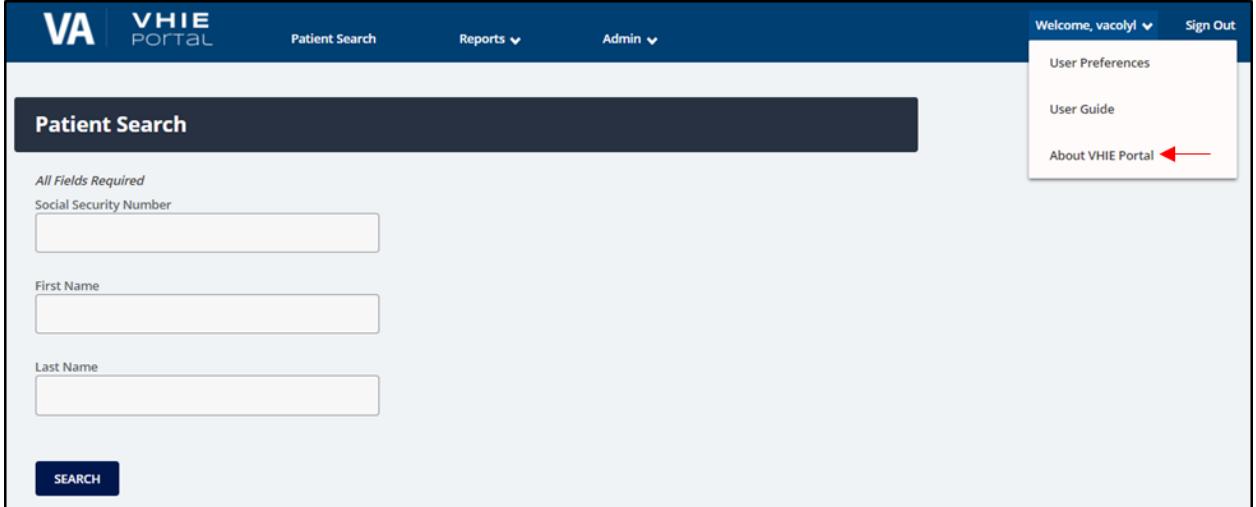
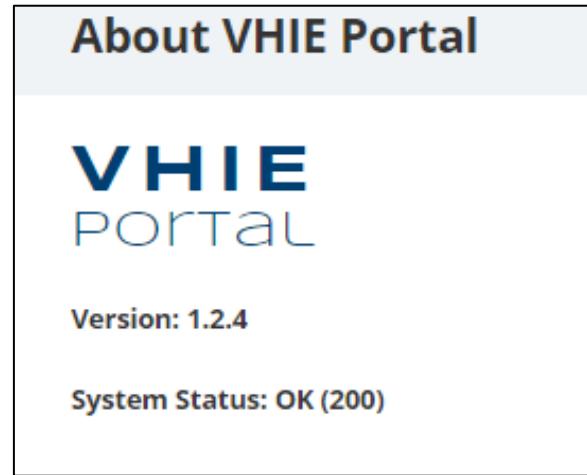
4.15.3. View System Software Information

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

Prerequisite:

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

Table 22: View System Software Information

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

5. Troubleshooting

5.1. Special Instructions for Error Correction

User Interface	Error	Cause	Resolution
Login Screen	User does not have permissions.	This is caused when the user account, passed from SSOi, is not mapped to the VHIE Portal user access list.	If you need access or have existing permissions, contact the Help Desk for support.
Patient Search Screen	SSN is required. Last Name is required. First Name is required.	The SSN, Last Name, and First Name fields must be filled before pressing the Search button. Any or all of these errors can occur depending on which fields were filled in and which were not.	The SSN, Last Name, and First Name fields must all be filled in before pressing the Search button.
Patient Search Screen	SSN is not valid.	The SSN field needs to contain nine (9) numeric characters. This error occurs if less than nine (9) numeric characters or any non-numeric characters are entered.	The SSN field must contain exactly nine (9) numeric and no other characters before pressing the Search button. (The Last Name and First Name fields must also be populated.)
Patient Search Screen	Last Name is not valid. First Name is not valid.	The Last Name and First Name fields must contain alphabetic characters only. Some special characters, such as periods and apostrophes, are allowed. Either or both errors can occur depending on which fields were filled incorrectly.	The Last Name and First Name fields must contain only alphabetic characters before pressing the Search button. (Some special characters are allowed, such as periods and apostrophes.)
Opt-out of Sharing Screen	Patient Signature Date must be after the date the authorization was signed.	This message occurs when you choose the "Opt-out" option on the Opt-out of Sharing screen if the patient signature date entered is earlier than the date the authorization was originally signed.	The Patient Signature Date field on the Opt-out of Sharing screen must be filled with a date later than the date the authorization was originally signed if you choose "Opt-out" as the reason.
Export Disclosures Report to .CSV	Date column is not displaying the date in a standard Date and Time format when opening using Excel.	This is a result of Excel automatically converting the text file into a different into a default format.	<ol style="list-style-type: none">1) Right-click on the Date column.2) Select Format Cells.3) Under the Number tab, select Date as the Category.4) Select the format Type to display the Date and Time (e.g. 2/14/12 1:30 PM)
View Saved XML for Disclosures Reports	Saved XML displays error message on the browser.	If using Google Chrome as the browser, after opening the XML file, the file is opened using IE as the default application.	<p>Resolution 1: Use IE as the browser when downloading XML.</p> <p>Resolution 2:</p>

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

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