Joint Legacy Viewer (JLV) 2.8.2

User Guide

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Version 1.2

Department of Veterans Affairs

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Revision History

Date	Version	Description	Author
02/13/2020	1.2	Approved by VA PM	AbleVets
02/12/2020	1.2	Added Data Sources table and submitted for approval	AbleVets
02/10/2020	1.1	Incorporated feedback and submitted for approval	AbleVets
01/17/2020	1.0	Delivered for review	AbleVets
01/13/2020	0.1	Initial draft of artifact from last approved	AbleVets

Artifact Rationale

Per the Veteran-focused Integrated Process (VIP) Guide, the user guide is required to be completed prior to Critical Decision Point #2 (CD2), with the expectation that it is updated as needed. A user guide is a technical communication document intended to give assistance to people using a system, such as Veterans Health Information Systems and Technology Architecture (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. It is usual to include screenshots of the human-machine interfaces, and hardware manuals often include clear, simplified diagrams. The language used is matched to the intended audience, with jargon kept to a minimum or explained thoroughly. The user guide is a mandatory, build-level document, and should be updated to reflect the contents of the most recently deployed build. The sections documented herein are required if applicable to your product.

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1. Introduction

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

JLV eliminates the need for VA and DoD clinicians to access disparate viewers. The GUI retrieves clinical data from several native data sources and systems, then presents it to the user via widgets, each corresponding to a clinical data domain. Users can create and personalize tabs, drag and drop widgets onto tabs, sort data within a widget's columns, set date filters, and expand a widget for a detailed view of patient information.

This document is intended for VA JLV users supporting the:

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

Table 1 describes authorized JLV users and their responsibilities.

Table 1: JLV User Profiles

User	Description and Responsibilities
Compensation and Pension Record Interchange (CAPRI)-Claims	VA administrative staff who access patient EHRs to assist in VBA processes
VHA	VA clinicians and administrative staff who access patient EHRs to assist in providing health care services
DoD Clinician	DoD clinicians who access patient EHRs

1.1. Purpose of the Guide

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

The major features of the JLV GUI include:

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

1.1.1. Guide Conventions

This document is designed for both online and hardcopy consumption.

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

1.1.2. Terminology

The following standard terms are used throughout this guide:

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

1.2. Assumptions

The user guide is written from the perspective of VA users, assuming the following:

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

1.3. System Requirements

JLV is optimized for use with the VA standard browser, Internet Explorer (IE) version 11. It is recommended that JLV is viewed using:

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

JLV must be accessed through IE. Other web browsers may function but are not certified for support. It is also recommended that Adobe Reader be installed on your system.

1.4. Getting Help

Please see online help for how-to information within JLV. Please visit JLV Resources for access to JLV training videos and additional JLV training materials.

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

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

IT Enterprise Service Desk
Phone: 855-673-4357
YourIT Self-Service Portal: https://yourIT.va.gov

If you are unable to retrieve community partner documents for a patient, please contact your local Veterans Health Information Exchange (VHIE) Coordinator. If you need assistance identifying your local contact, please e-mail VHIECommunityEngagement@va.gov.

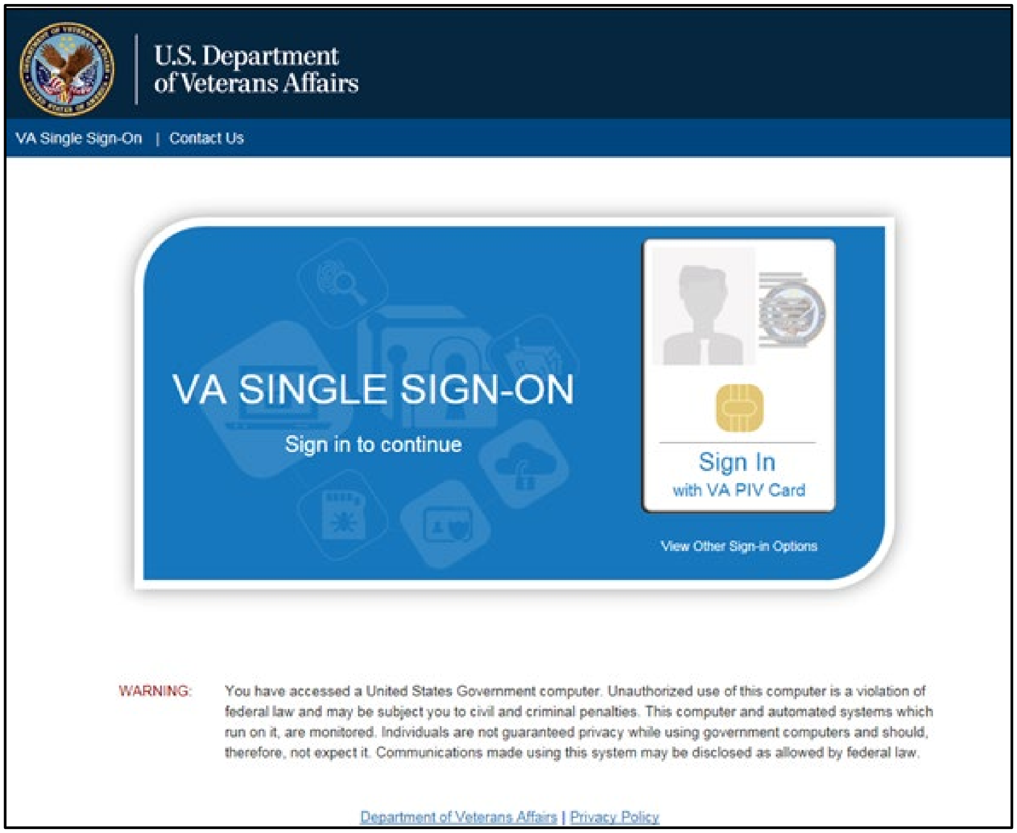
2. Logging in to JLV

Users who have access to the Computerized Patient Record System (CPRS), CAPRI, and Cerner PowerChart are automatically authorized to use JLV.

NOTE: There is no functionality available to change a user identification (ID) and password in JLV. See Troubleshooting for information about login errors, Access code errors, or Verify code errors.

1. Enter the JLV URL (https://jlv.med.va.gov/JLV) into the address bar of your Internet browser, select the **JLV** button CPRS if available, select the **Joint Legacy Viewer** tab in CAPRI, or select the **JLV** button in PowerChart
2. All users are redirected to the **VA Single Sign-On Internal (SSOi)** page (Figure 1)
   a. Click the **Sign in with VA Personal Identity Verification (PIV) Card** graphic
   b. Select the CA B1 certificate, and click **OK**
   c. Enter your Personal Identification Number (PIN), and click **OK**

Figure 1: SSOi Page for VA Users



3. Once authenticated by the SSOi system, you are redirected to JLV
4. Read the important user consent information regarding access to a government information system, and click **I Accept**
5. If you have adaptive technology installed, you can check the **Accessibility Mode** option on the JLV **Login** page
    a. If selected, JLV opens and displays the application in the 508-compliant Accessible User Interface (UI) theme (See Using the Accessible Theme's Functionality for detailed information)
6. Enter your VA login credentials:
    a. Enter your Access Code
    b. Enter your Verify Code
    c. Select VA from the **Agency** field
    d. Select your VA Medical Center or regional health care system, if you are a CPRS user, or CAPRI-Claims, if you are a CAPRI user, from the **Site** field
7. Click **Login**

NOTE: Users with any CAPRI patient selection restrictions must use the **Joint Legacy Viewer** tab in CAPRI to access JLV.

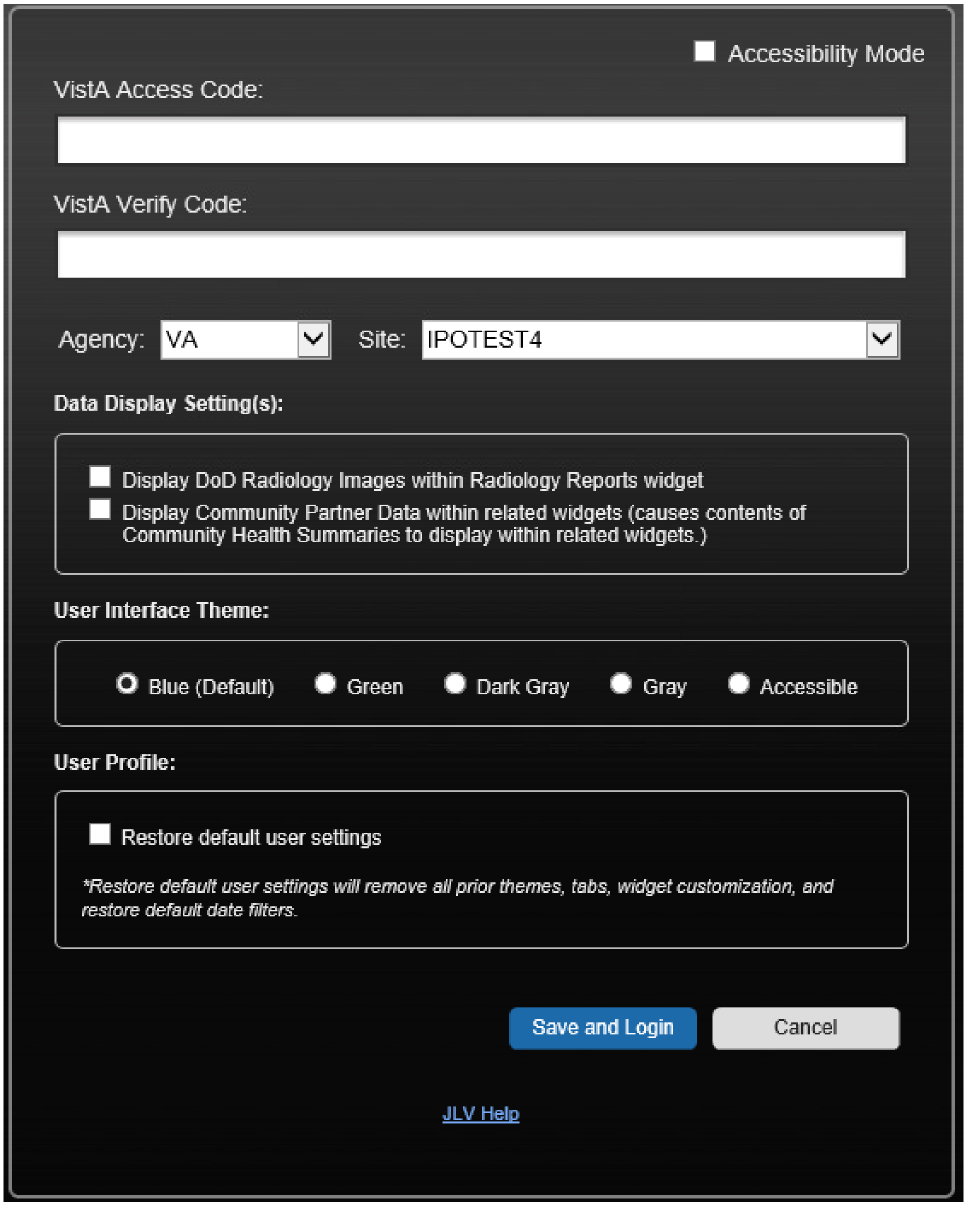
2.1. Editing Your User Profile at Login

One method of setting application configuration options (i.e., customizing) is by using the **Edit Profile** link (Figure 2) to access the user profile fields through the JLV **Login** page (Figure 3). User profile options can also be set within JLV. See Customizing JLV.

NOTE: The selected options are saved to your user profile by clicking **Save and Login** and remain set for all subsequent JLV sessions until you change them.

Figure 2: Edit Profile Link on the JLV Login Page

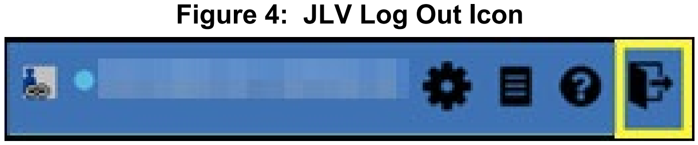
Figure 3: User Profile Data Source and User Interface Option Fields



2.2. Logging Out of the Current JLV Session

Click (highlighted in Figure 4) at any time to end the current session and exit JLV.

Figure 4: JLV Log Out Icon



A JLV session ends automatically after 60 minutes of inactivity. Actions in JLV that are considered activity are changing patients, refreshing widgets, opening or closing widgets, adding or removing widgets from the portal pages, and adjusting date ranges. You receive an audible and visual warning that the current session is about to terminate after 55 minutes of inactivity. Automatic termination of a session logs you out of the application, closes all JLV tabs and windows, and displays the **Logout** page. Close and reopen the browser and return to the JLV **Login** page to initiate a new JLV session.

If SSOi is enabled, you are redirected to the **VA Single Single-On Logout** page.

3. The Elements and Functionality of JLV

3.1. The JLV Portal Pages

After a successful log in, your username displays on the portal toolbar, and the JLV portal pages are displayed. The JLV portal pages are:

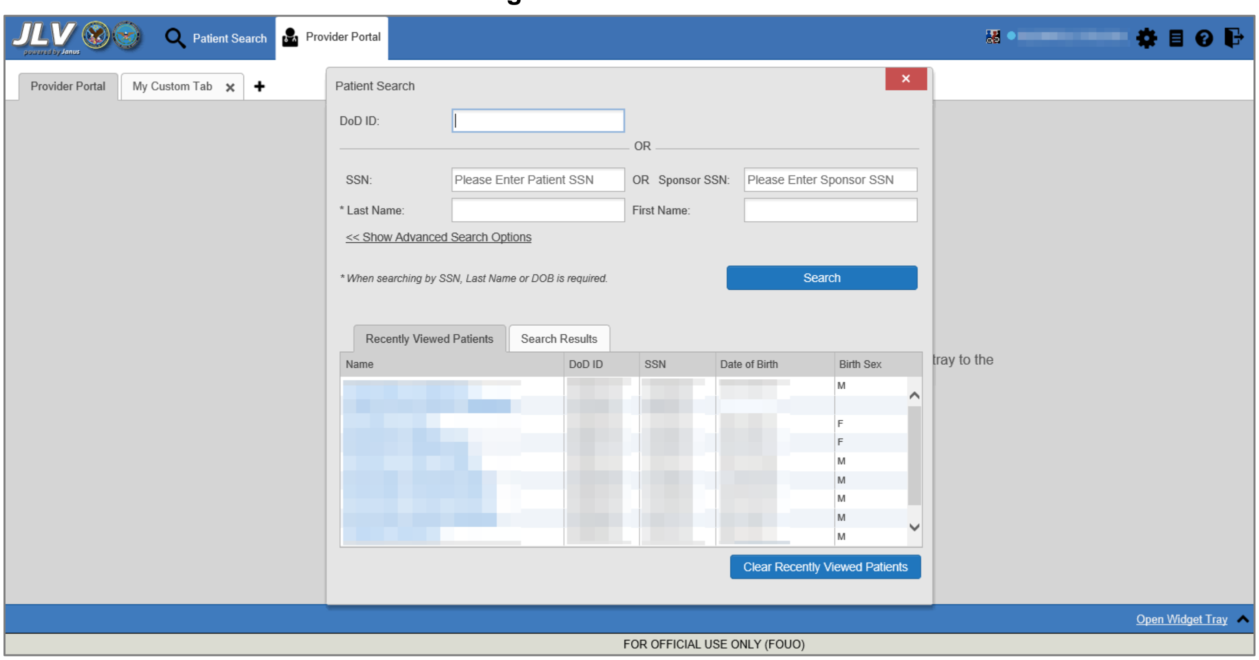
- The **Patient Portal**
- The **Provider Portal**

3.1.1. Default View

Upon log in, you see the **Provider Portal**. The portal displays the **Patient Search** dialog box by default.

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

Figure 5: Default View



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

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

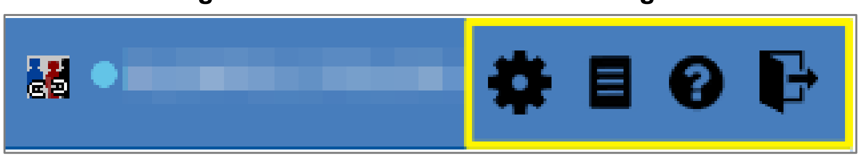
> **NOTE:** You can configure the layout of widgets on the **Patient Portal** and create multiple widget tabs, as described in Customizing JLV and in Accessing and Opening Widgets. Customizations are saved to your user profile and remain until manually changed.

3.1.2. System Menu

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

- **Configuration Options:** Click to set user preferences, including the UI theme (Refer to Customizing JLV)
- **Report Builder:** Click to create custom reports (Refer to Using Report Builder)
- **Access Online Help:** Click to open online help
- **Log Out of JLV:** Click to log out and close the current JLV session (Refer to Logging Out of the Current JLV Session)

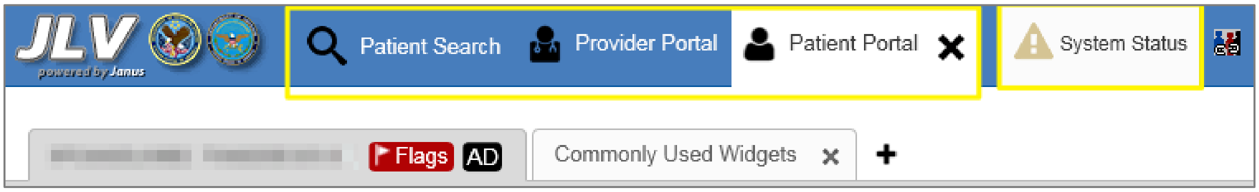
Figure 6: JLV Tools on the Portal Pages



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

- Perform a **Patient Search**
- Switch between the **Patient Portal** and the **Provider Portal**
- View the system status
- View Context Management status
- Open the widget tray using the **Open Widget Tray ^** link in the lower right corner of the portal pages (as shown in Accessing and Opening Widgets, Figure 35)

Figure 7: More JLV Functionality



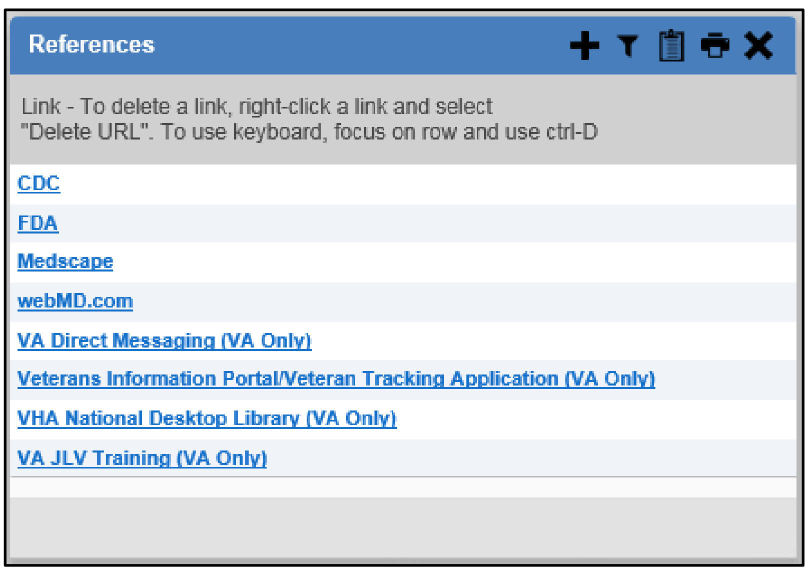
Switching from the **Patient Portal** to the **Provider Portal** closes all associated patient tabs and windows to prevent confusion between patient records.

3.1.3. References Widget

The **References** widget (Figure 8) displays hyperlinked references to online resources. Click the **Open Widget Tray** link (or click the up arrow) in the lower right corner of the **Provider Portal** to view the widget tray. Click and drag the **References** widget from the tray up to the portal and position where desired. Click a reference link to access the associated website. Click ✚ to add a new reference link.

Only the reference links you add can be deleted. Right-click the link and select **Delete URL** to delete a reference link. You cannot delete reference links included in the default widget configuration.

Figure 8: References Widget



3.1.4. Viewing System Status

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

NOTE: The System Status reports the overall condition of the JLV application, while the Connection Status reports the condition of the connection between JLV and its external resources. See Viewing Connection Status for more information.

JLV displays the system status below the user credential fields on the **Login** page, as well as at the top of the portal pages.

- When all monitored systems and services are online and connected, appears next to the status message, "*JLV data sources are available*"
- When one or more of the monitored systems or services is offline or unavailable, appears next to the status message, "*Services are not available to JLV*"
- When JLV is unavailable, appears next to the message, "*System status is unavailable*"
  - You may not be able to log in to JLV or view patient data until the connection is restored

These warnings may be accompanied by one or more of the notices listed in Table 2, depending on which services are unavailable.

Table 2: System Status Notices by Service

Service	Notice
jMeadows	***"The service that gathers patient data and prepares it for display in JLV is unavailable.*** *JLV is available for login but may not function otherwise."*
Master Veteran Index (MVI)	***"VA Patient Identity Service is unavailable.*** *Patient search may not be available, and VA and community partner data may not display."*
Patient Discovery Web Service (PDWS)	***"DoD Patient Identity Service is unavailable.*** *Patient search may not be available and DoD data may not display."*
Relay Service	***"All DoD, Federal EHR, and Community Partner data in widgets is currently unavailable.*** *The source connection is down and DoD, Federal EHR, and Community Partner data of all types from all sites may not display."*
VistA Data Service (VDS)	***"The connection to VA sites is unavailable.*** *VA patient records of all types from all sites may not display."*

Figure 9 shows a system status message on the **Login** page, and Figure 10 shows the **System Status** hover text on the toolbar in the upper right corner of the application.

Figure 9: System Status on the JLV Login Page

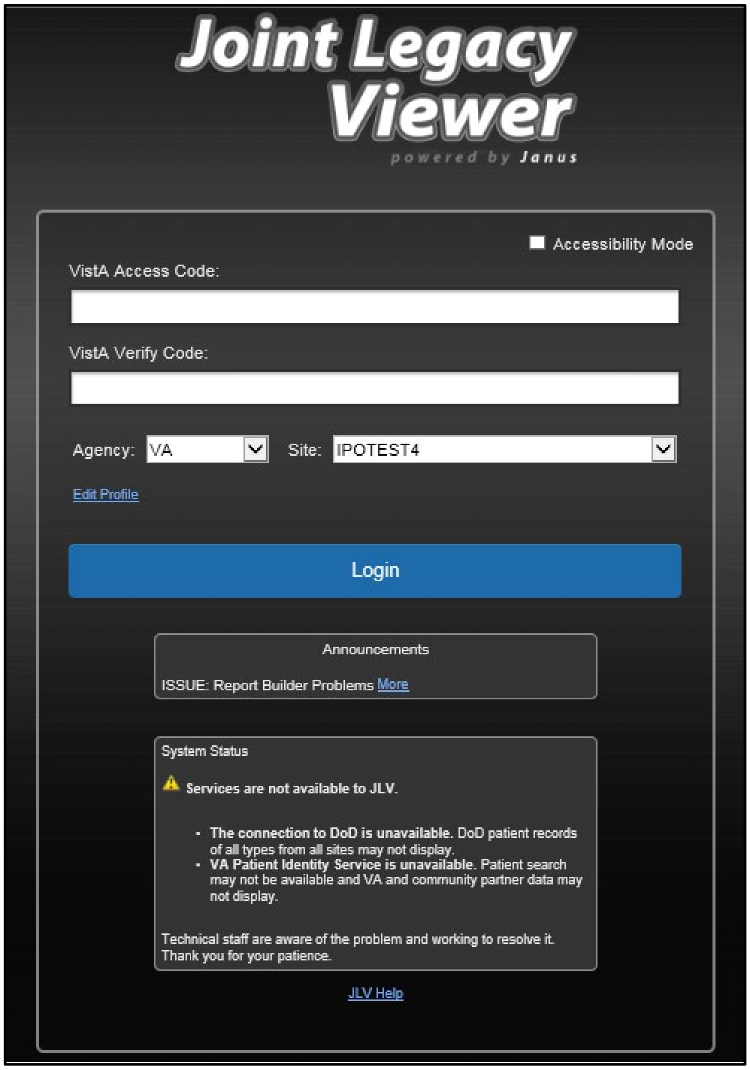
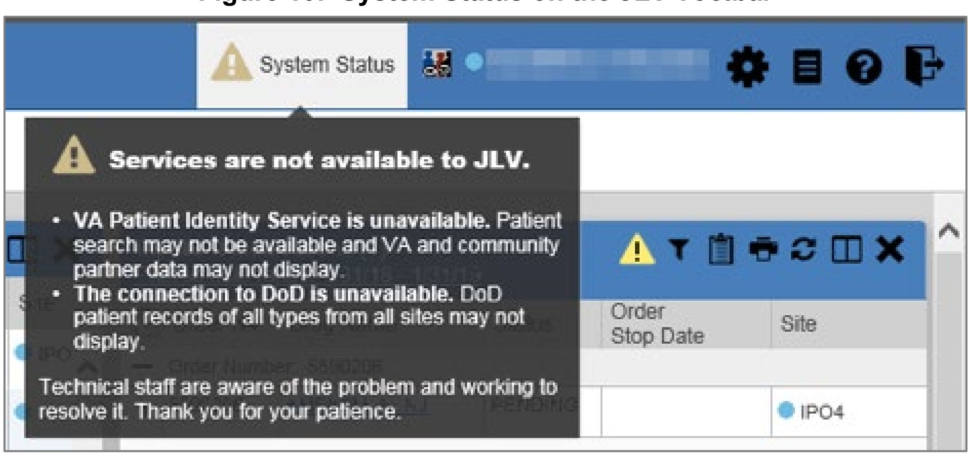


Figure 10: System Status on the JLV Toolbar



3.1.5. Patient Context Management

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

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

Context management is enabled by default, and JLV attempts to connect to the context vault upon a valid login. The context status appears in the upper right corner of the portal pages. When context is established, is shown. When context is suspended, is shown.

Figure 11 shows the context indicator location on a JLV portal page. Context is suspended in this example.

Figure 11: Context Indicator

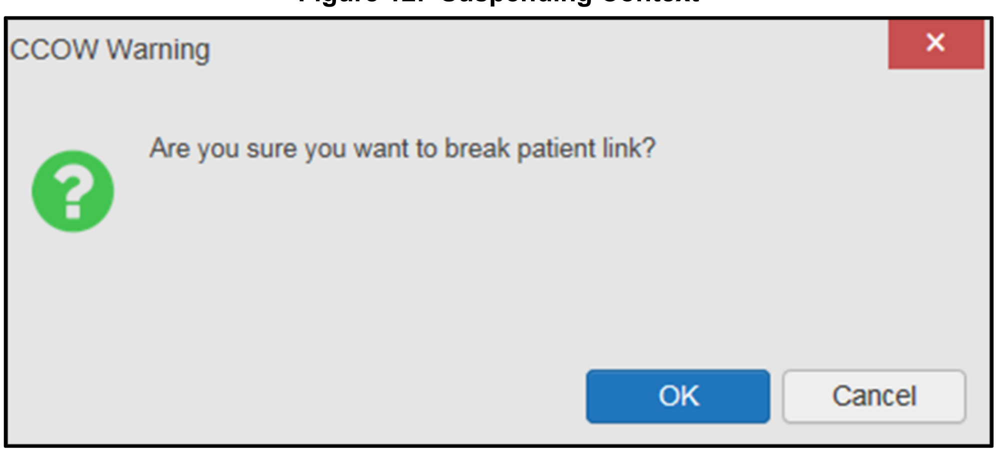
3.1.5.1. Suspending Context

Context can be manually suspended.

1. Click
2. The CCOW warning message, "*Are you sure you want to break patient link?*" appears (Figure 12)
3. Click **Yes** to continue

Once context is suspended, displays on the portal pages. When context is suspended, patient changes are not reflected in either JLV or other CCOW-enabled applications.

Figure 12: Suspending Context



3.1.5.2. Establishing Context

When context is suspended, it can be reestablished manually.

1. Click
2. The CCOW warning message, "*Are you sure you want to rejoin patient link?*" appears (Figure 13)
3. Click **Yes**

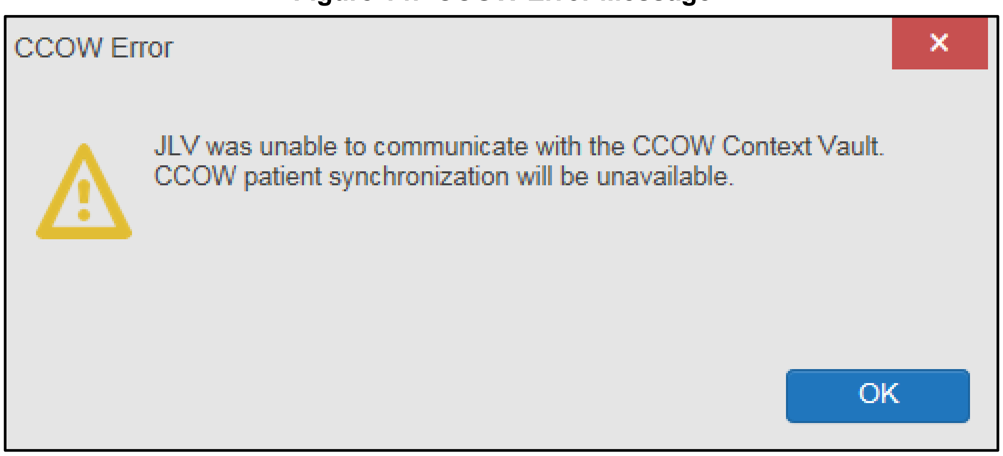
Once context is established, displays on the portal pages.

Figure 13: CCOW Warning Message

3.1.5.3. Unable to Communicate with Vault

If JLV is unable to initiate context management upon log in, you see the CCOW Error message (Figure 14). Click **OK** to continue. displays on the portal pages. If the CCOW error persists, contact your local service desk for assistance.

Figure 14: CCOW Error Message



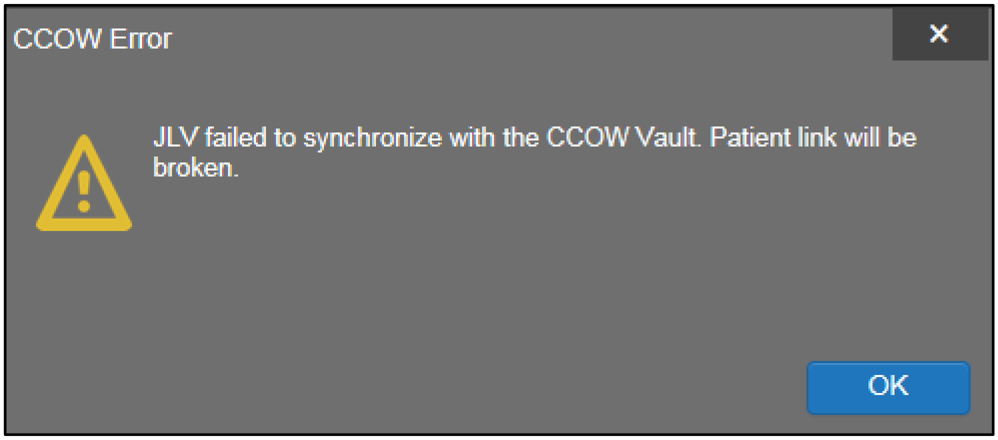
NOTE: This error message automatically displays if you have more than one active JLV session open.

3.1.5.4. Context Synchronization Failure

A CCOW error message is presented if JLV is unable to reestablish context (Figure 15). This indicates context is suspended. Click **OK** to continue. displays on the portal pages.

CAPRI-Claims users may encounter the error message (Figure 15) at each log in, as there are usually no CCOW system components installed on their computers.

Figure 15: Context Synchronization Failure

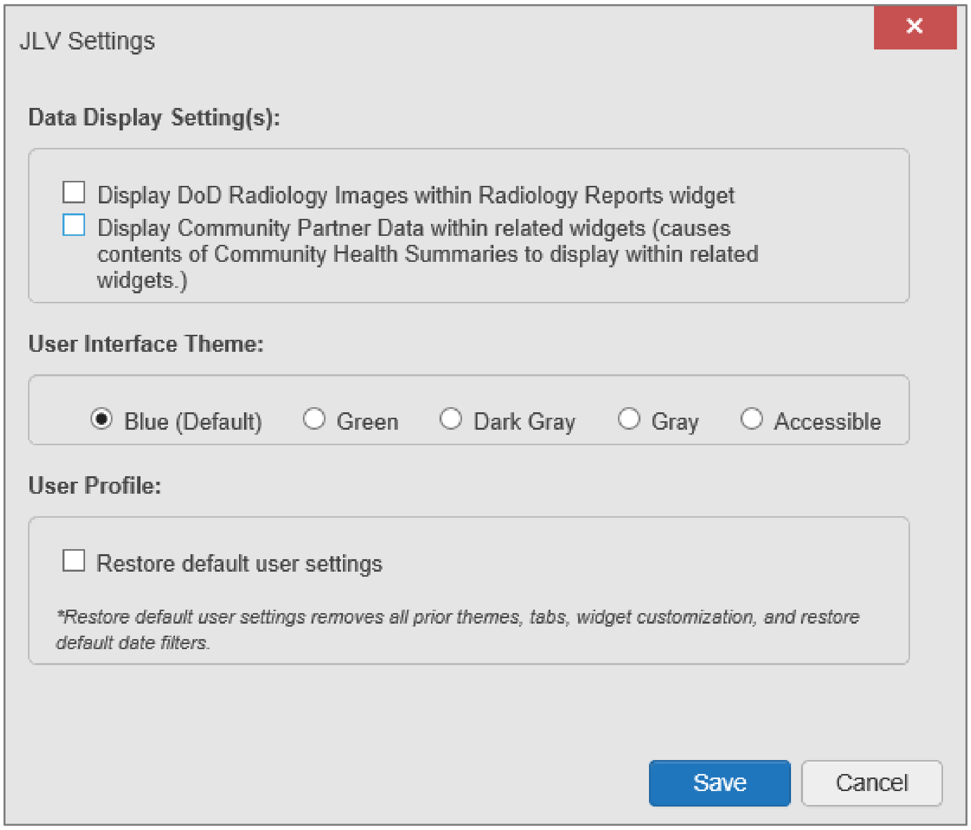


3.2. Customizing JLV

Configuration options, such as data sources and UI theme, can be set in the **JLV Settings** dialog (Figure 16). These settings are saved to your user profile and persist.

1. Click the **Edit Profile** link on the **Login** page (Figure 2) or on the portal pages (Figure 6)
   a. The **JLV Settings** dialog box opens
2. (Optional) Select the desired data source checkbox
3. Select the radio button next to the desired theme
4. Click **Save** to apply the selected data source and/or theme **OR**
5. Click **Cancel** to exit the dialog box and restore the previous data source and/or theme configuration

Figure 16: JLV Settings Dialog Box



NOTE: Changing the data sources or UI theme will require you to reselect and reload the current patient.

You may reset your user profile to JLV defaults by selecting the **Restore Default User Settings** checkbox and then the **Save** button in the **JLV Settings** dialog. This feature resets the theme and data source options to default; removes any custom tabs; and resets all widgets to their default configurations, which removes any custom sort or filter settings.

3.2.1. About Data Display Settings

The data display setting is part of your user profile. The data source setting enables you to specify whether or not to include DoD radiology images or community partner data. These options are disabled by default.

NOTE: Community partner data is suppressed for CAPRI/Claims users and does not display as a data source option.

JLV displays data source indicators in the **Site** columns of individual widgets (Figure 17). A blue circle indicates VA data; an orange square indicates DoD data; a purple hexagon indicates community partner data (if enabled); and a green triangle indicates Cerner Millennium Federal Electronic Health Record (FEHR) data (Table 3). Hovering over individual data source indicators provides more specific information about the data source.

Table 3: Data Sources

Icon	Sources	Hover information	Data Supplied
XXX **XXX = the three-letter VistA site abbreviation**	CPRS/VistA system data	VA: location Examples: • VA: Walla Walla, WA • VA: Central Texas HCS[1]	Supplies all records from CPRS/VistA for all sites. These records will remain available even after a site transitions to VA EHRM[2] (Cerner).
DoD	CHCS[3] (CDR[4]), AHLTA[5], Essentris, TMDS[6], various clinical applications	DoD source system : Full name of DoD Medical Treatment Facility Examples: • CDR: Fairchild AFB[7] • AHLTA: JB[8] San Antonio	Supplies all records from all sites from all DoD facilities for all legacy applications. These records will remain available even after a site transitions to MHS GENESIS (Cerner).
FEHR	DoD MHS GENESIS (Cerner) and VA EHRM (Cerner) records stored in Cerner Millennium	FEHR: VA or DoD facility name/location Examples: • FEHR: Spokane, WA • FEHR: Madigan AMC[9]	Supplies records from VA and DoD facilities that have migrated to the new Federal EHR, called MHS GENESIS in DoD and VA EHRM (Cerner) in VA.
Name **Name = Community Partner name**	All DoD and VA Community Partners (VHIE/VLER[10]), Sequoia Project and DoD Health Information Exchange)	Federal HIE[11]: Community Partner Organization Name Examples: • Federal HIE: UC[12] San Diego • Federal HIE: Mayo Clinic	Supplies continuity of care documents, care summaries, and notes when provided by partners. Partner capabilities and responses vary.

3.2.2. About UI Themes

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

[1] Health Care System
[2] Electronic Health Record Modernization
[3] Composite Health Care System
[4] Clinical Data Repository
[5] Armed Forces Health Longitudinal Technology Application
[6] Theater Medical Data Store
[7] Air Force Base
[8] Joint Base
[9] Army Medical Center
[10] Virtual Lifetime Electronic Record
[11] Health Information Exchange
[12] University of California

Figure 17: Blue (Default) UI Theme[13] with Community Partner Data Enabled

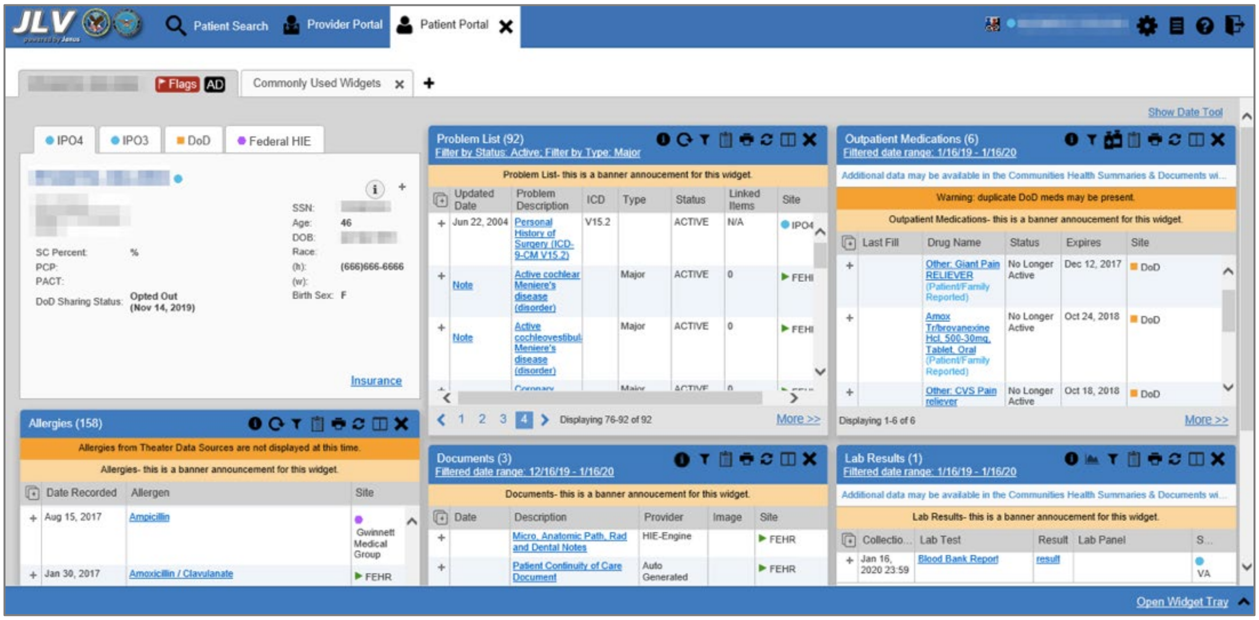
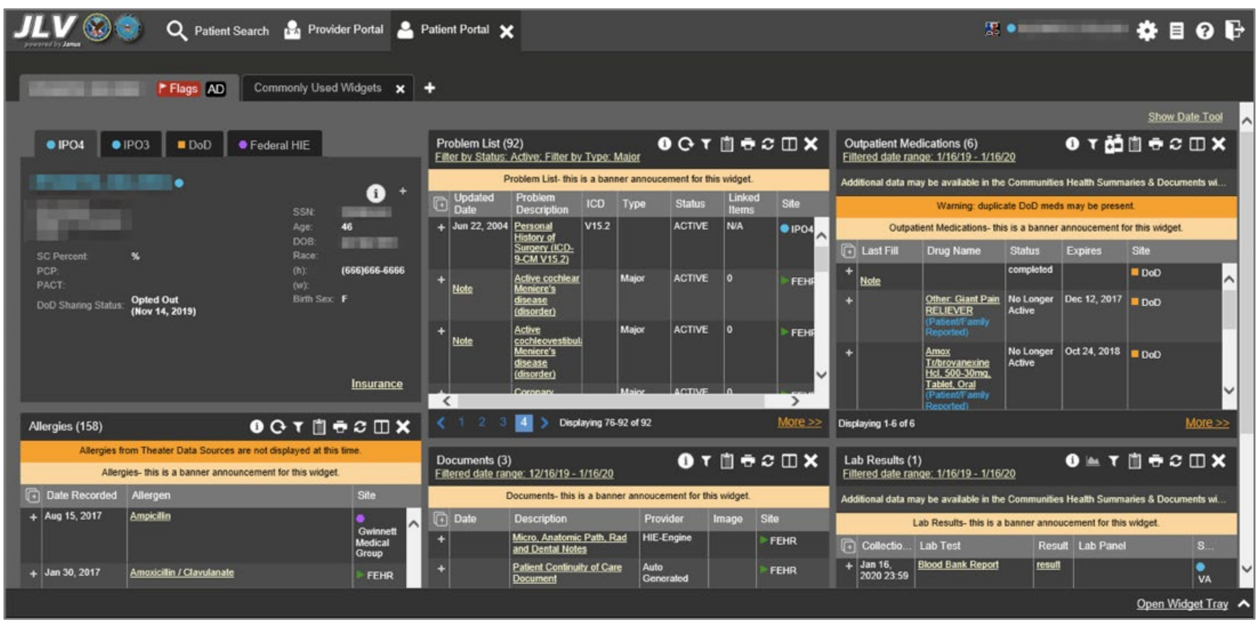


Figure 18: Dark Gray UI Theme with Community Partner Data Enabled



[13] Primary Care Management (PCM), Social Security Number (SSN), Date of Birth (DOB)

Figure 19: Green UI Theme with Community Partner Data Enabled

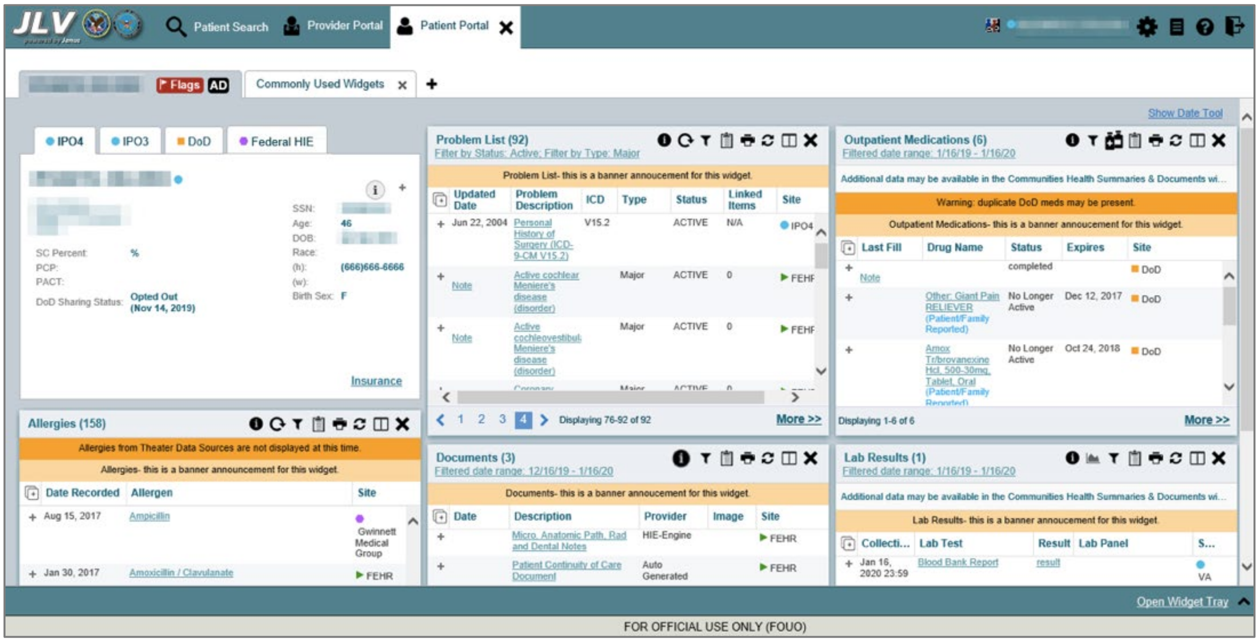


Figure 20: Gray UI Theme with Community Partner Data Enabled

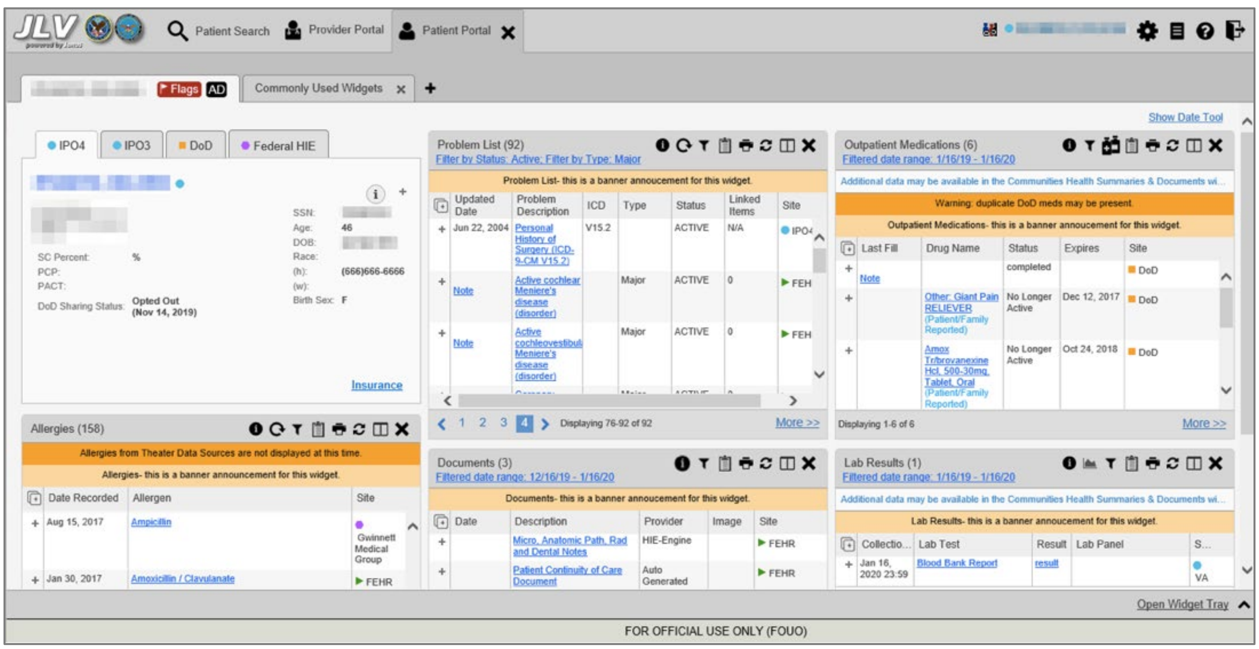
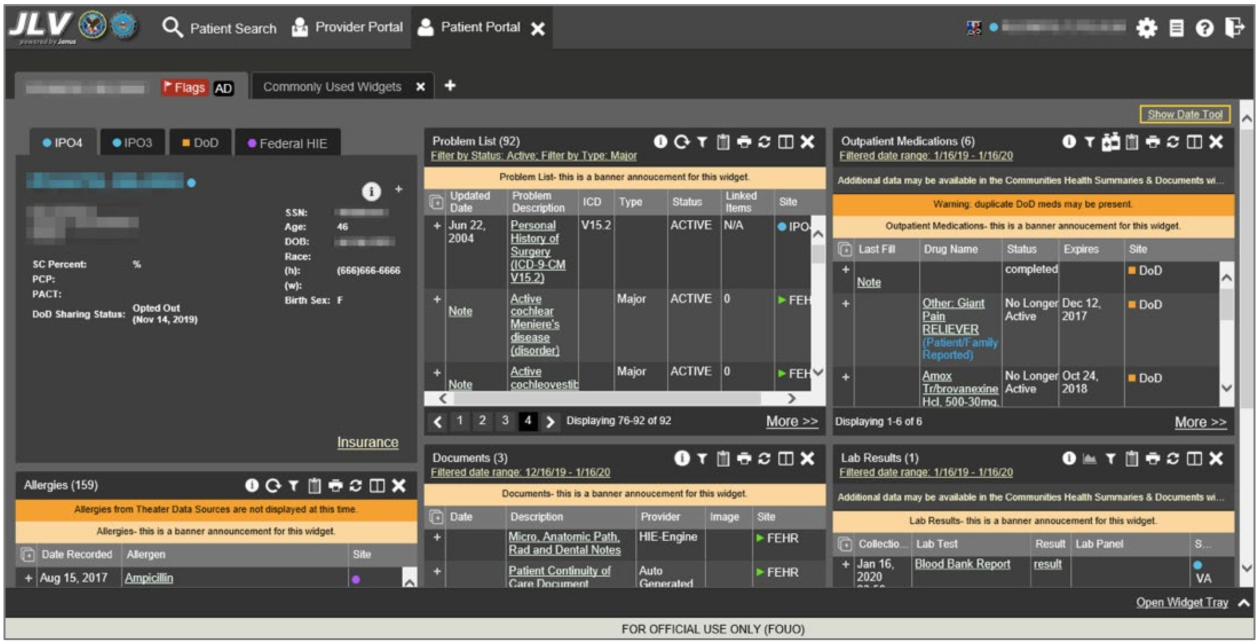


Figure 21: Accessible (508-Compliant) UI Theme with Community Partner Data Enabled



3.2.3. Using the Accessible Theme's Functionality

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

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

3.2.3.1. Keyboard Focus and Portal Navigation

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

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

Pressing **Enter** or the **Spacebar** when an element that provides action is in keyboard focus performs the associated action; for example, pressing **Enter** or the **Spacebar** when the is in focus opens the **JLV Settings** dialog box. Using the arrow keys or the **Tab** key moves between keyboard focus items to navigate through screen elements. Table 4 provides a complete list of accessible keystrokes.

Table 4: Accessible Theme Keyboard Shortcuts

Keystroke	Description
Portal & Widget Navigation	
ALT + 4	Press to transfer keyboard focus to the main or top screen element 1) Focus transfers to **Patient Search** or the patient tab in the **Demographics** widget on a portal page 2) Focus transfers to the **More>>** link in a widget 3) Focus transfers to in a dialog box
ENTER	Press to initiate the action associated with the item in focus
TAB	Press to transfer keyboard focus to other user interface items
ESC	Press to return keyboard focus to the panel containing the user interface item with keyboard focus or to exit a window, widget, or tab
SPACEBAR	Press to activate any user interface item (for example, click a button)
Arrow Keys	When focused on a widget, press the arrow keys to change page viewing in a widget's data table When focused on a dropdown list, press the down arrow key to view list contents
Ctrl + d	Place keyboard focus on a reference or row within the **References** widget on the **Provider Portal** and press **Ctrl + d** to remove the reference URL Removing a default reference is not allowed
Tab Panels	
Arrow Keys	Use the left and right arrow keys to change tab panels.
TAB	1) Press **Tab** until is in focus 2) Press **Enter** 3) The new tab dialog box opens and prompts you to enter a name for the new tab 4) Tab to the **Add** button to confirm the new tab name or tab to the **Cancel** button to discard the new tab
Windows or Dialog Boxes	
TAB	Press to transfer keyboard focus to other user interface items within the window or dialog box
Adding Widgets to a Portal Page	
Number position	Add a widget from the widget tray using keystrokes: 1) Determine in which column (1, 2, or 3) to place the widget 2) Focus on the desired widget icon in the widget tray, and press the **Alt** key and the 1, 2, or 3 key, depending on the column chosen

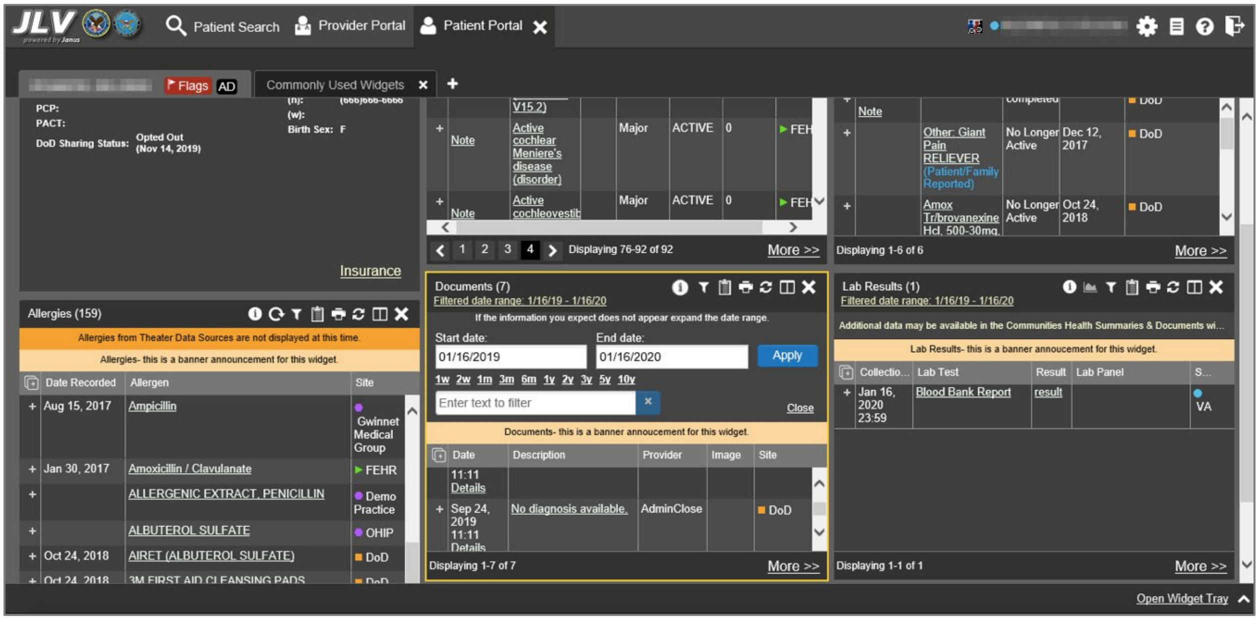
3.2.3.2. Accessible Theme Portal Navigation

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

Figure 22 depicts the **Documents** widget with keyboard focus. Focus can be changed by pressing the **Tab** key. Pressing the **Tab** key in this example shifts the keyboard focus from the **Documents** widget to the widget immediately below the **Documents** widget. Pressing the **Tab** key again shifts the keyboard focus to the widget at the top of the next column.

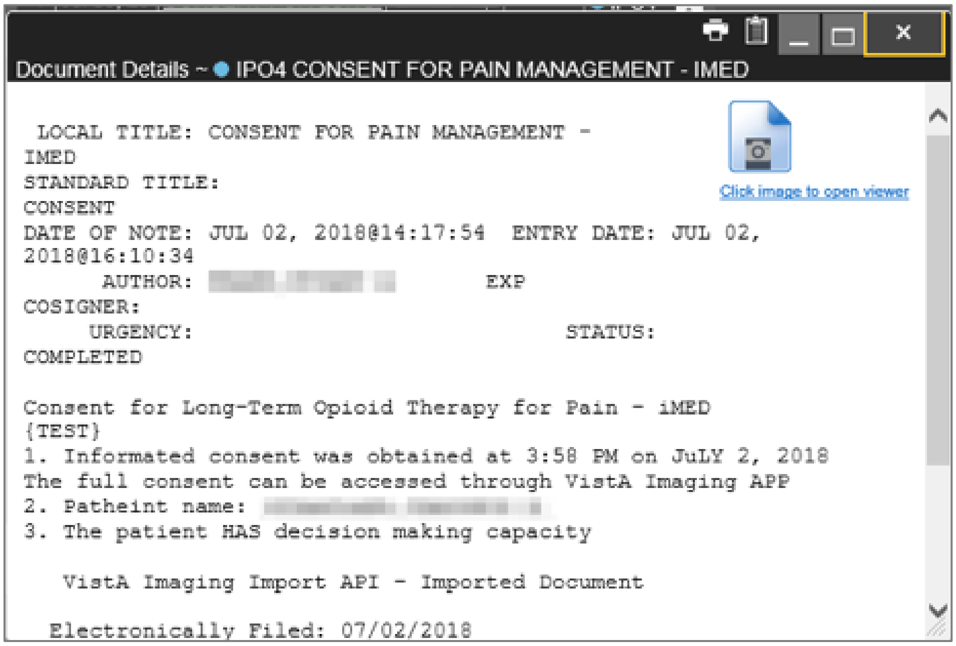
NOTE: Focus on the element within the widget that has hover text. After a small delay, the text appears as if you hovered over the element with your mouse cursor.

Figure 22: Navigation Using Elements with Keyboard Focus



The **Document** details window has keyboard focus in Figure 23. Move through the toolbar buttons by using the arrow keys, or by pressing **Tab**. Move to and press **Enter** to close the details window. After closing the window, keyboard focus returns to the last element that had keyboard focus prior to opening the window.

Figure 23: Document Details with Keyboard Focus



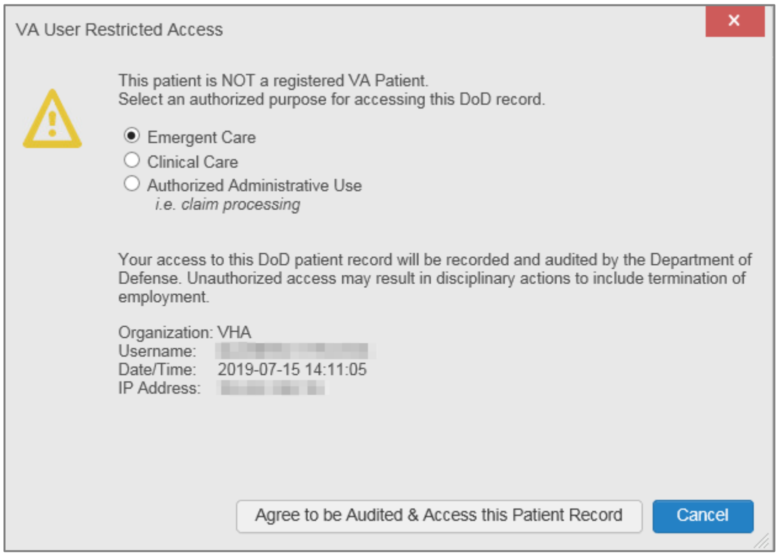
3.3. User-Restricted Access to Patient Data

3.3.1. VHA Users Viewing DoD-only Patient Data

VHA users can view the records of DoD-only patients, meaning they are not registered in MVI, but VA requires that these actions be audited. If an attempt is made to access DoD-only patient records, the VHA user is asked to specify the purpose for access. The purpose options presented to the user are: Emergent Care, Clinical Care, or Authorized Administrative Use (Figure 24).

Once the purpose for access is selected, clicking **Agree to be Audited & Access this Patient Record** (Figure 24), displays the requested data, and audits the action. The access purpose, organization of the VA provider, date, username, IP address, user's Internal Entry Number (IEN), host system's ID, and patient's Electronic Data Interchange Personal Identifier (EDIPI) are captured in the audit record.

Figure 24: VA User Restricted Access Dialog



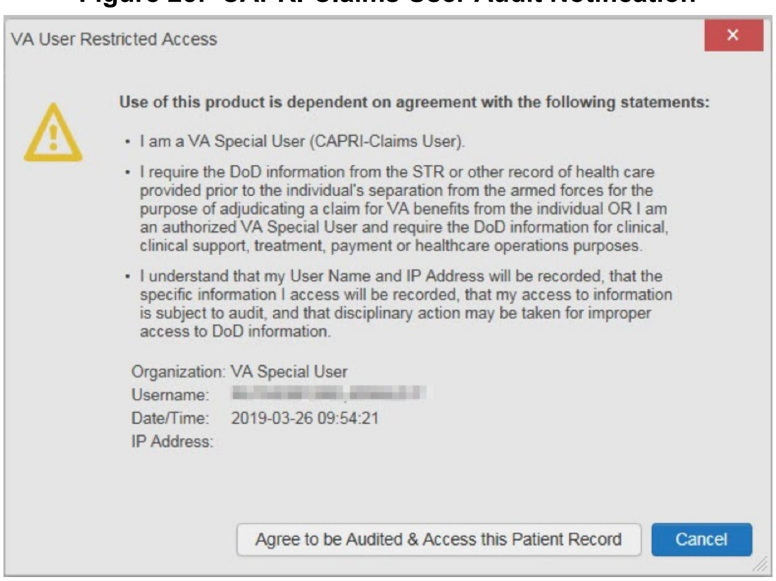
3.3.2. CAPRI-Claims Users Viewing Patients with DoD Data

CAPRI-Claims users may see one of two different dialog boxes, depending on whether the patient is registered for care in the VA. If the patient is registered for care in the VA, they are in MVI.

3.3.2.1. Patient Registered in MVI

CAPRI-Claims users are permitted to view the records of a patient who is registered in MVI, but the VA requires that these actions be audited. After performing a patient search and selecting a patient from the search results, a CAPRI-Claims user sees the audit notification (Figure 25) if the patient they selected is registered in MVI. After agreeing to the audit, the CAPRI-Claims user can access the patient's record.

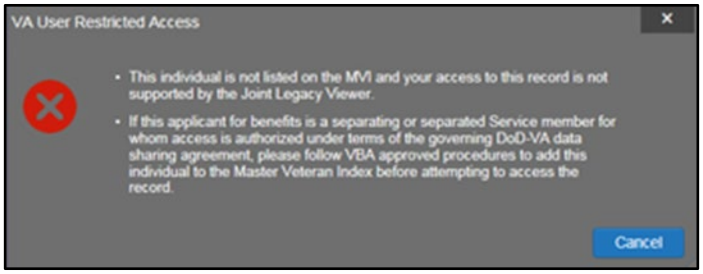
Figure 25: CAPRI-Claims User Audit Notification



3.3.2.2. Patient Not Registered in MVI

CAPRI-Claims users are not permitted to access the records of a patient who is not registered in MVI. After performing a patient search and selecting a patient from the search results, a CAPRI-Claims user sees the restricted access notification (Figure 26) if the selected patient is not registered in MVI. Clicking **Cancel** returns the user to the previous screen.

Figure 26: Restricted Access Notification



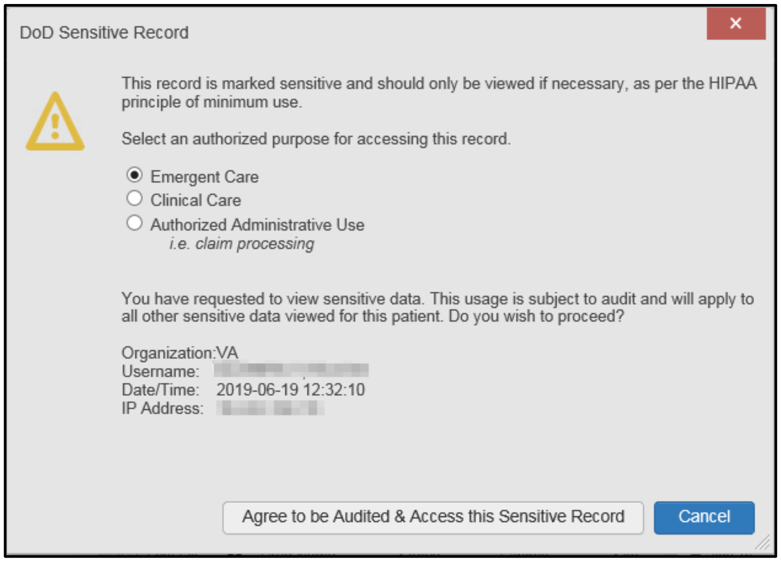
3.3.3. Access to DoD Sensitive Records

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

JLV notifies you before you are audited. The message is triggered the first time you click a masked record that is marked **** Sensitive****. Your acknowledgement of the audit notification covers all subsequent DoD sensitive records in any widget during the remainder of the session, and it only expires when you switch patients or log off. An example of a masked record audit notification is depicted in Figure 27.

After you select the purpose for viewing the record and agree to be audited, the sensitive data displays in the **Details** view of the widget.

Figure 27: DoD Sensitive Record and Audit Dialog Box



3.4. Patient Searches

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

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

- If the EDIPI or Sponsor SSN is entered, JLV utilizes PDWS for the search (See PDWS Search Rules and Supported Searches for details)
- If the EDIPI or Sponsor SSN fields are empty, JLV utilizes MVI for the search (See MVI Search Guidelines for details)

3.4.1. PDWS Search Rules and Supported Searches

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

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

The following search combinations are supported when PDWS is utilized:

- DoD ID, also referred to as the EDIPI
- Patient SSN and Last Name

- Patient SSN and DOB
- Sponsor SSN and Last Name
- Sponsor SSN and DOB
- Last Name, First Name, DOB, and Birth Sex (ALL identifiers must be entered)

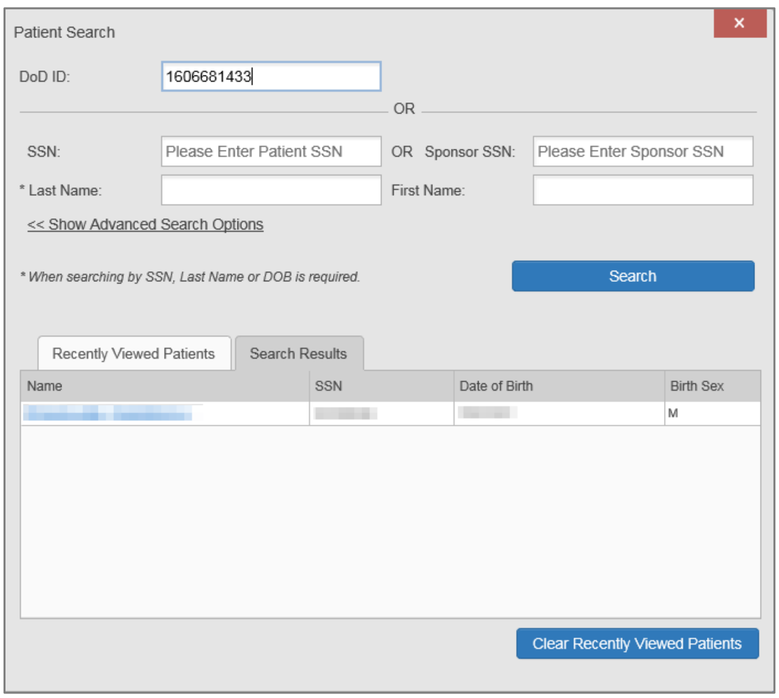
3.4.2. MVI Search Guidelines

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

3.4.3. Patient Search Using DoD ID

1. Click **Patient Search**
    a. The **Patient Search** dialog opens
2. Enter the 10-digit patient DoD ID (EDIPI) in the **DoD ID** field (Figure 28)

Figure 28: DoD ID (EDIPI) Search



3. Click **Search**
    a. The search results are displayed in the lower third of the dialog box, under the **Search Results** tab
4. Click a patient's name in the search results list to open the associated record

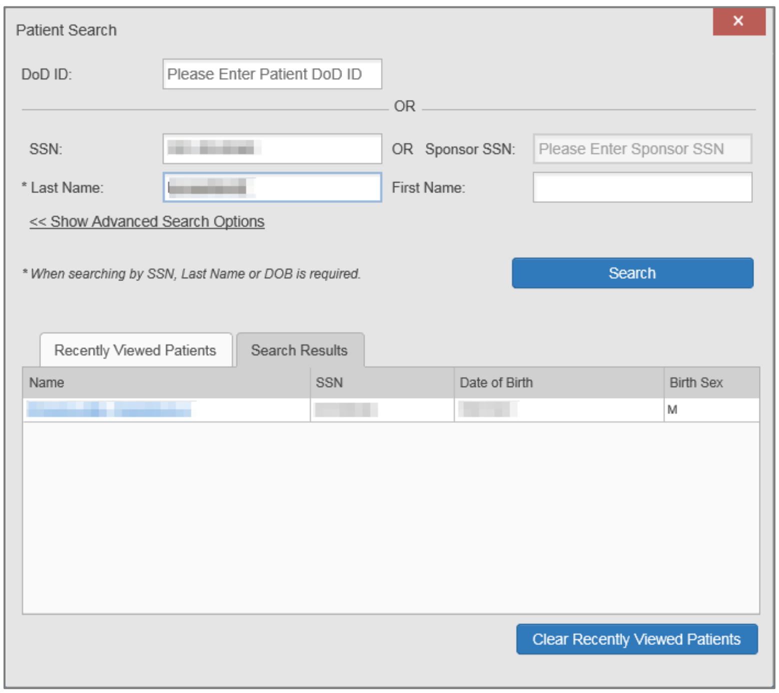
a. The **Name**, **SSN**, **DOB**, and **Birth Sex** columns in the results list provide information to assist with patient identification

5. After selecting a patient, the **Patient Portal** opens and displays the selected patient's data

3.4.4. Patient Search Using SSN

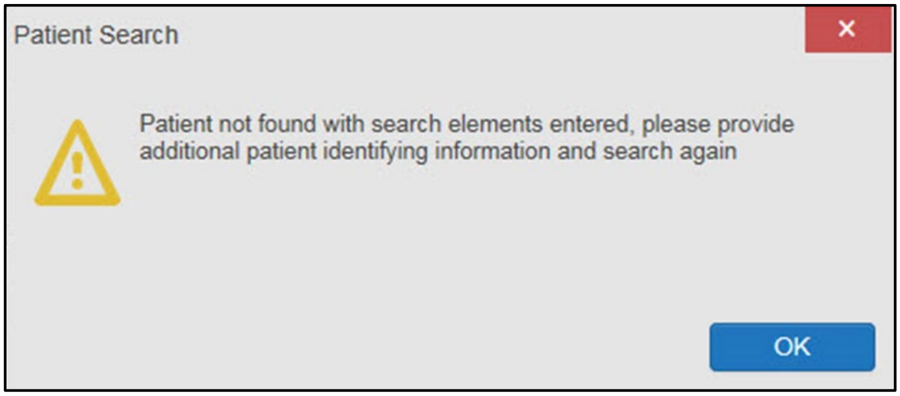
1. Click **Patient Search**
   a. The **Patient Search** dialog box opens
2. Enter the patient's full, nine-digit SSN in the **SSN** field (Figure 29)
   a. When searching by SSN, either the last name or the DOB *must* be entered to perform the search

Figure 29: SSN Search



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

Figure 30: Additional Identifiers Needed



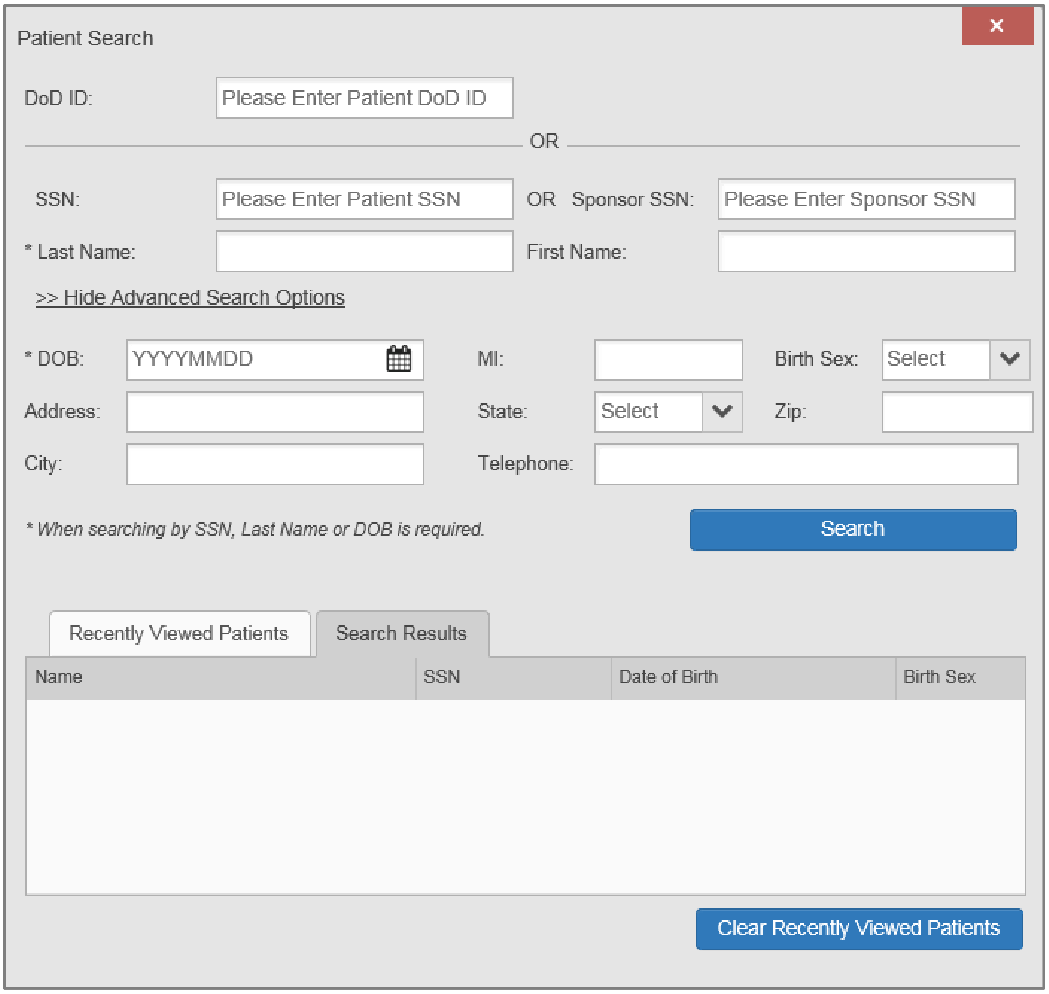
4. The search results are displayed in the lower third of the dialog box, under the **Search Results** tab
5. Click a patient's name in the search results list to open the associated record
    a. The **Name**, **SSN**, **DOB**, and **Birth Sex** columns in the results list provide information to assist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

3.4.5. Advanced Patient Search Options

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

1. Click **Patient Search**
    a. The **Patient Search** dialog box opens
2. Click the **<<Show Advanced Search Options** link under the ***Last Name** field (seen in Figure 29)
3. Enter the patient identifiers in the appropriate search fields, as desired
    a. Advanced search option fields include ***DOB**, **MI**, **Birth Sex**, **Address**, **State**, **City**, **Zip**, and **Telephone** (seen in Figure 31)

Figure 31: Advanced Search Options



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

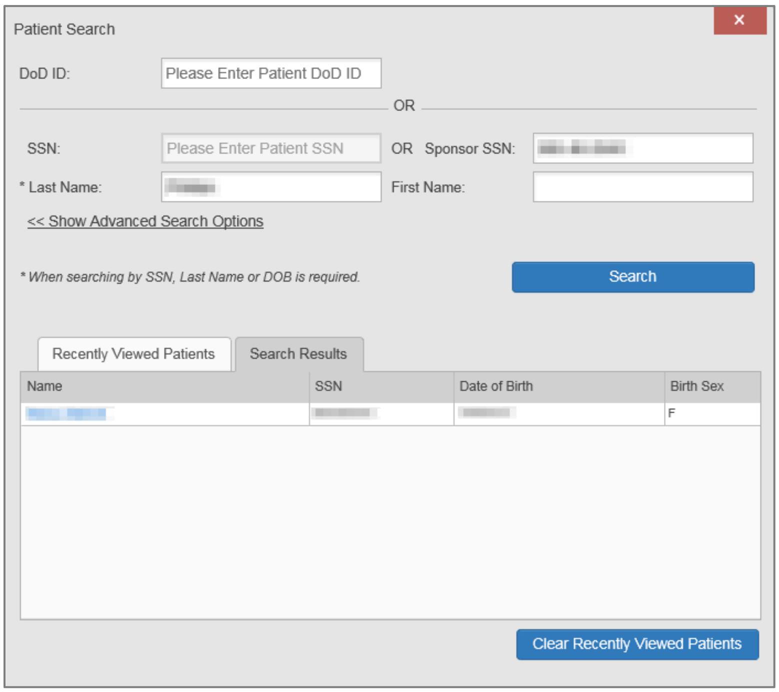
3.4.6. Family Member Search

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

1. Click **Patient Search**
   a. The **Patient Search** dialog box opens

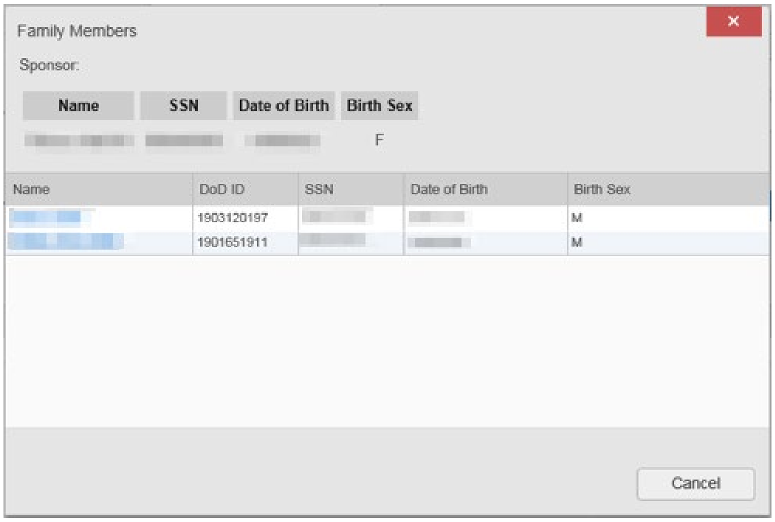
2. Enter the SSN in the **Sponsor SSN** field
    a. The **Last Name** or **DOB** of the patient must also be entered in the appropriate fields (Figure 32)
3. Click **Search**
    a. If the required patient identifiers are not provided, hover text appears indicating the information necessary to complete the patient search
4. The search results are displayed in the lower third of the dialog box, under the **Search Results** tab (Figure 32)

Figure 32: Sponsor SSN Search



5. Click a name in the **Search Results** list
    a. The **Family Members** dialog opens (Figure 33)
    b. The sponsor's identifiers and a list of dependents are displayed in the dialog
6. Click a name in the list of family members to open the associated record
7. After selecting a patient, the **Patient Portal** opens and displays the selected patient's data

Figure 33: Family Members Dialog Box



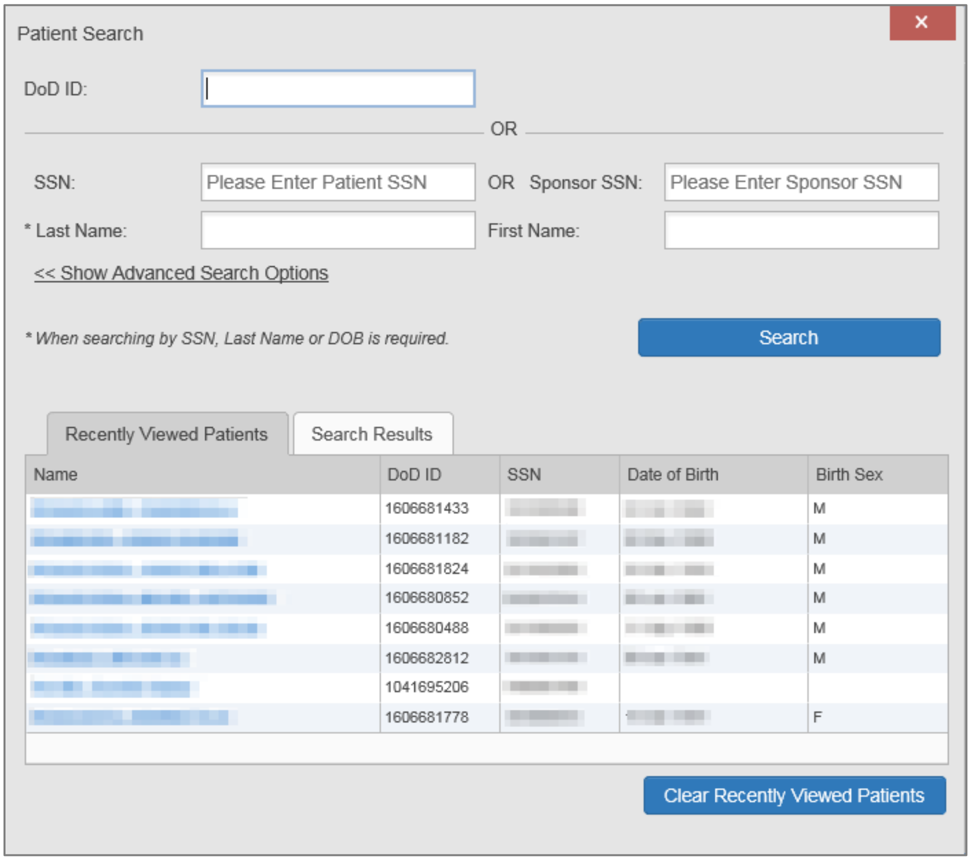
3.4.7. Recently Viewed Patients List

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

NOTE: The **Recently Viewed Patients** list does not include search history or recent search results, only a list of patients whose data was accessed and viewed. The list is limited to 10 patients. You can clear this list by selecting the **Clear Recently Viewed Patients** button.

1. Click **Patient Search**
   a. The **Patient Search** dialog box opens
2. Click the **Recently Viewed Patients** tab in the lower third of the **Patient Search** dialog box
3. A list of recently viewed patients is displayed (Figure 34)
   a. The **Name**, **DoD ID**, **SSN**, **DOB**, and **Birth Sex** columns in the results list provide information to assist with patient identification
4. Click a patient's name in the **Recently Viewed Patients** list to open the associated record
5. After selecting a patient, the **Patient Portal** opens and displays the selected patient's data

Figure 34: Recently Viewed Patients List



4. Widgets

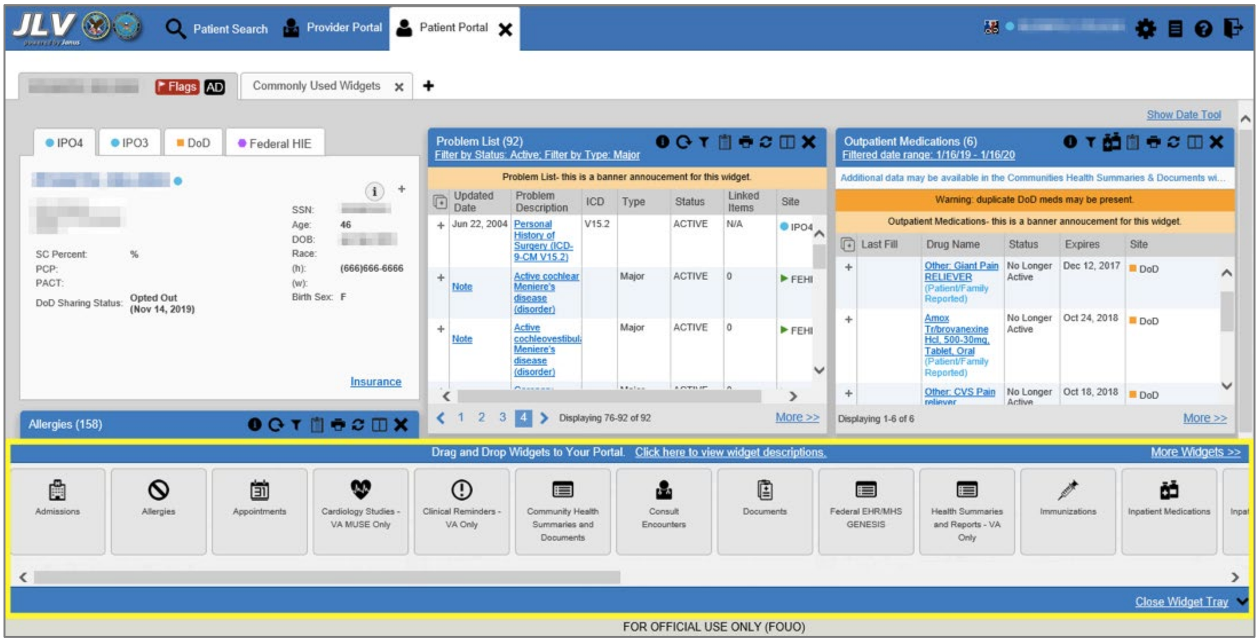
Widgets are elements on the JLV portal pages that display data specific to a clinical domain. By default, widgets are displayed in minimized view on the portal pages (Figure 17), but they can be expanded to view additional details. The list of available widgets is provided in a horizontal tray at the bottom of the page.

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

4.1. Accessing and Opening Widgets

All available widgets are displayed in the widget tray, at the bottom of the portal page (Figure 35). Hover over a widget icon to view a description of the widget. Widgets can be opened, rearranged, and closed. JLV can display up to 12 widgets per tab.

Figure 35: Widget Tray



1. Open the widget tray by clicking the **Open Widget Tray** link
2. Use the scroll bar arrows < > at either end of the tray to see all widget choices or click the **More Widgets >>** link to scroll through the list of widgets
3. Click and hold a widget icon in the tray, drag it to the portal page, and drop it in the desired location
   a. The widget is docked on the portal page and opens in minimized view
4. Close the widget tray by clicking the **Close Widget Tray** link

NOTE: JLV displays a **Duplicate Widget** notice if you attempt to add another instance of a widget to a tab.

Widgets can be closed (removed from the portal page) by clicking ✖. Rearrange the widgets displayed on the portal page by dragging and dropping them.

4.2. Widget Navigation and Display Options

Each widget has tools and display options available to navigate through, and change, the display of data. The vertical scroll bar allows you to move through, and view, the widget's data. The options at the bottom of a widget provide various ways to see all the records loaded for the widget's clinical domain. Navigation icons and actions are detailed in Table 5.

Table 5: Navigation Icons and Actions

Navigation Icon	Action	Description
<	Changes the focus of the widget to the previous group or page of records within the results display.	Go to Previous Page

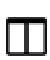
Navigation Icon	Action	Description
	Changes the focus of the widget to the page number selected.	Jump to Page
	Changes the focus of the widget to the next group or page of records within the results display.	Go to Next Page
More >>	Available in minimized views only. Opens the expanded view of the widget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

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

4.3. Widget Toolbars

There is a toolbar on both the minimized and expanded views of each widget and most dialog boxes. Toolbar buttons vary by widget, dialog box, and window. Table 6 describes the functionality of each toolbar button.

Table 6: Widget Toolbar Icons

Icon	Name	Function
	**Add to Report Builder**	Adds the information displayed in the widget to the Report Builder, including any **Details** or **Notes**.
	**Close**	Removes the widget from the portal screen or closes a dialog box.
	**Column Settings**	Configures the columns within the widget. Turn the columns on or off by checking the column names that appear in the pop-up box and clicking **Apply**.
	**Configure Filter**	Filters on specific record types or other elements within the widget, including a date filter. If a date range filter is applied in an open widget, the date range is displayed in the widget header. **Note:** After setting a filter, the **Close Filter** option is enabled in the widget. Clicking **Close Filter** restores the full display of records within the widget.

Icon	Name	Function
	Copy to Clipboard	Copies the content of the open window to the clipboard for pasting into another application. **Copy to Clipboard** is disabled in the widget toolbar after clicking **Show All** within a widget.
	Connection Status	Both icons provide a status indicator for DoD and VA data sources. indicates all sources are available. indicates one or more data sources are unavailable. Clicking either status icon opens the connection status details in a separate window.
	Print	Prints the contents of the open window. **Print** is disabled in the widget toolbar after clicking **Show All** within a widget. **Note:** It is recommended that you have the latest Adobe Reader installed for the Report Builder and other printing features.
	Graph	Opens a dialog to configure the display of multiple data of the same type in a graph.
	Refresh Community Partner Data	Refreshes the widget with the community partner data
	Refresh	Refreshes the widget or window display. Only the data within that widget's dataset is updated.
	Rx	Converts the medication data within the widget to text and opens the text in a pop-up window. Available from the **Outpatient Medications** widget.

4.4. Minimized vs. Expanded Widget View

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

NOTE: The **Cardiology Studies – VA MUSE Only**, **Community Health Summaries and Documents**, and **Federal EHR/MHS GENESIS** widgets do not have an expanded view. Instead, a record opened from the minimized view of the widget is displayed in a new, separate window.

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

4.5. Sort and Filter Options

Widgets have a variety of methods to sort and filter data. In general, you can:

- Click a column title to sort records according to data in that column
    - If you sort a column that appears in both minimized and expanded views of the widget, the sort saves in your user profile and persists

- If you sort a column that is only in the expanded view of the widget, your next session restores the default widget sort, or the last sort saved to your user profile
- If you sort a **Date** column that has some partial or missing date values, understand:
  - Dates that have month and year but lack a day are treated as though the day were "00" (e.g., July 2018 sorts between June 30, 2018 and July 01, 2018)
  - Dates that have a year only are treated as though the month is January and the day is "00" (e.g., 2018 sorts between December 31, 2017 and January 01, 2018
- Click on the widget toolbar to show or hide columns within the widget
  - Check/uncheck the column names that appear in the pop-up dialog box, then click **Apply**

Sort and filter capabilities are specific to the data presented in each widget and may vary between the minimized and expanded views of an individual widget or between widgets. Table 1 lists available filters and their corresponding widgets.

Table 7: Available Widget Filters

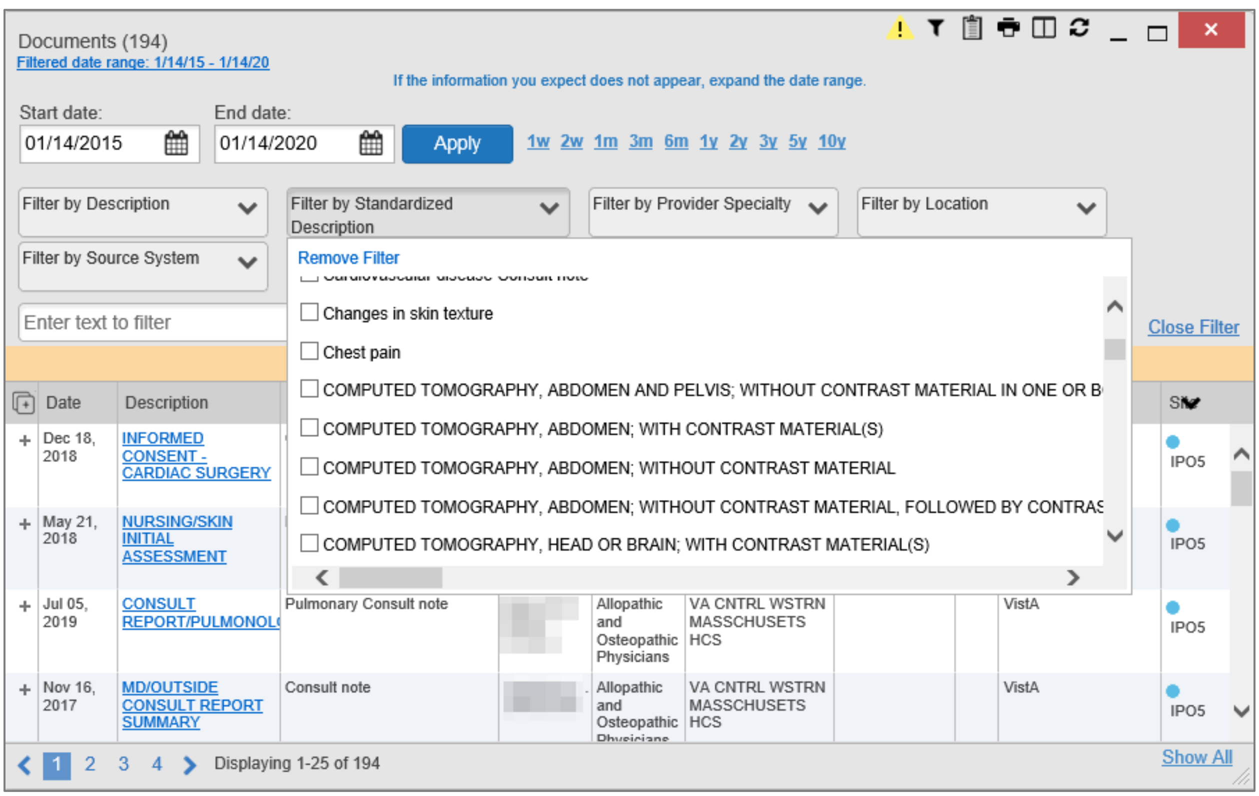
Filter By	Widgets
Site	Admissions, Allergies, Appointments, Consult Encounters, Documents, Health Summaries and Reports, Inpatient Medications, Inpatient Summaries, Lab Results, Orders, Outpatient Encounters, Outpatient Medications, Problem List, Procedures, Progress Notes, Questionnaires and Deployment Forms, Radiology Reports, Surgery/Procedure Reports, Vitals
Site (Reporting)	Immunizations
Provider	Inpatient Summaries, Progress Notes, Surgery/Procedure Reports
Provider Specialty	Appointments, Consult Encounters, Documents, Inpatient Summaries, Orders, Outpatient Encounters, Procedures, Progress Notes
Clinic	Appointments, Outpatient Encounters
Consult Order	Consult Encounters
Description	Documents
Problem Description	Problem List
Standardized Description	Documents, Problem List
Location	Documents[14], Inpatient Summaries
Source System	Documents
Vaccine Administered Product Type	Immunizations
Standardized Vaccine Product Type	Immunizations
Drug Name	Inpatient Medications, Outpatient Medications
Standardized Drug Name	Inpatient Medications, Outpatient Medications
Ordering Health Care Provider (HCP) Specialty	Inpatient Medications, Outpatient Medications

[14] Only available in expanded view

Filter By	Widgets
Note Type	Inpatient Summaries
Lab Test	Lab Results
Type	Lab Results; Orders; Problem List[15]; Procedures; Social, Family, and other Past Histories; Vitals
Standardized Type	Orders, Vitals
Status	Problem List
Document Type/Title	Progress Notes
Standardized Document Type	Progress Notes
Exam	Radiology Reports
Standardized Radiology Exam	Radiology Reports
Standardized Finding	Social, Family, and other Past Histories
Note Title	Surgery/Procedure Reports
Procedure	Surgery/Procedure Reports

Filter dropdowns dynamically expand and sometimes have a horizontal scroll bar to display long lines of data by which records can be filtered (Figure 36).

Figure 36: Dynamically Expanded Filter Dropdown in the Documents Widget



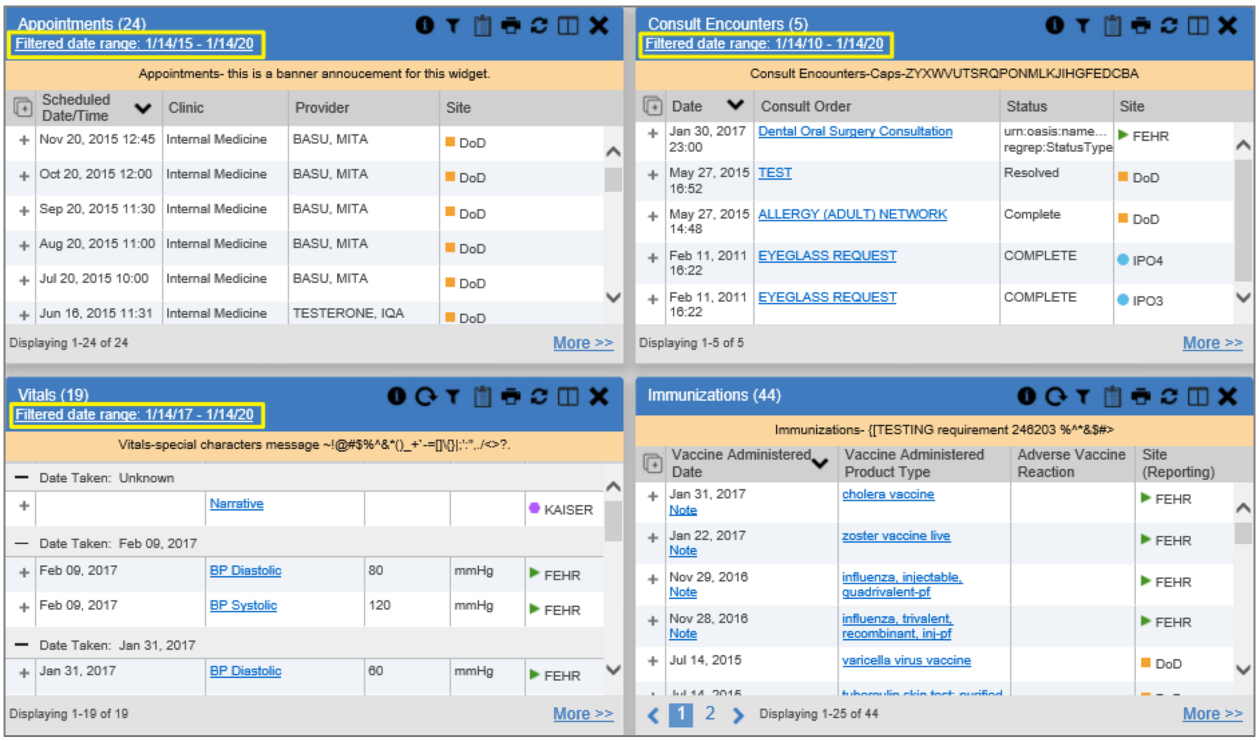
[15] Filter applies to DoD data only

Some widgets also have the capability to configure data to display multiple records of the same type in a graph or table view.

4.5.1. Widget Date Range Filters

Patient data displayed within a widget can be filtered by date range. If a date range filter is applied, the selected range is indicated in the widget header, below the title. Click or the **Filtered Date Range** link on the widget toolbar to change the date range of the data displayed ([Figure 37](#)).

Figure 37: Date Range Filters Applied



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

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

> **NOTE:** When looking for Essentris information associated with a specific admission in the Inpatient Summaries widget, expand your search date ranges to include additional days before and after the admission. This includes pre-admission notes as well as notes signed after the patient was discharged in the filtered widget display.

4.5.1.1. Quick Date Range Filter

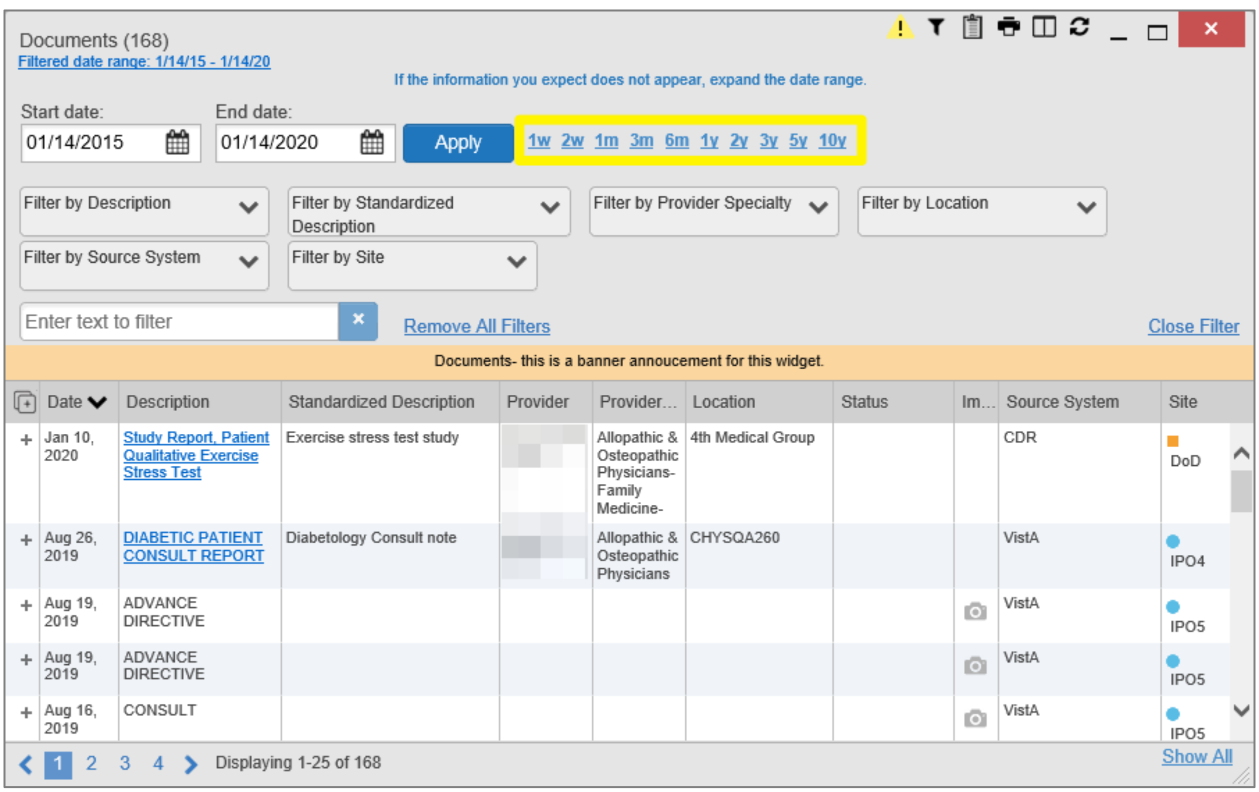
Use the preset, **Quick Date Range** filter to set or limit the display of patient records within a widget. This option is available by clicking the **Filtered Date Range** link or by clicking in a widget on the **Patient Portal**.

Clicking a **Quick Date Range** filter refreshes the data displayed to show only the records for the selected range. Selecting **Cancel**, which is the **Apply** button while the data refresh is running, stops the query. The options represent time counting back from the present day (for example, selecting 2y displays only records within the last 2 years). Examples of preset date ranges include 1w (last 7 days), 6m (last 6 months), and 3y (last 3 years).

> **NOTE:** The **Quick Date Range** filter is contextual. If today is February 2, 2017, the preset filter counts backwards using that date. If today is April 16, 2017, the preset filter counts backwards using that date.

Figure 38 highlights the **Quick Date Range** filter options in the expanded view of the **Documents** widget.

Figure 38: Quick Date Range Filter Options



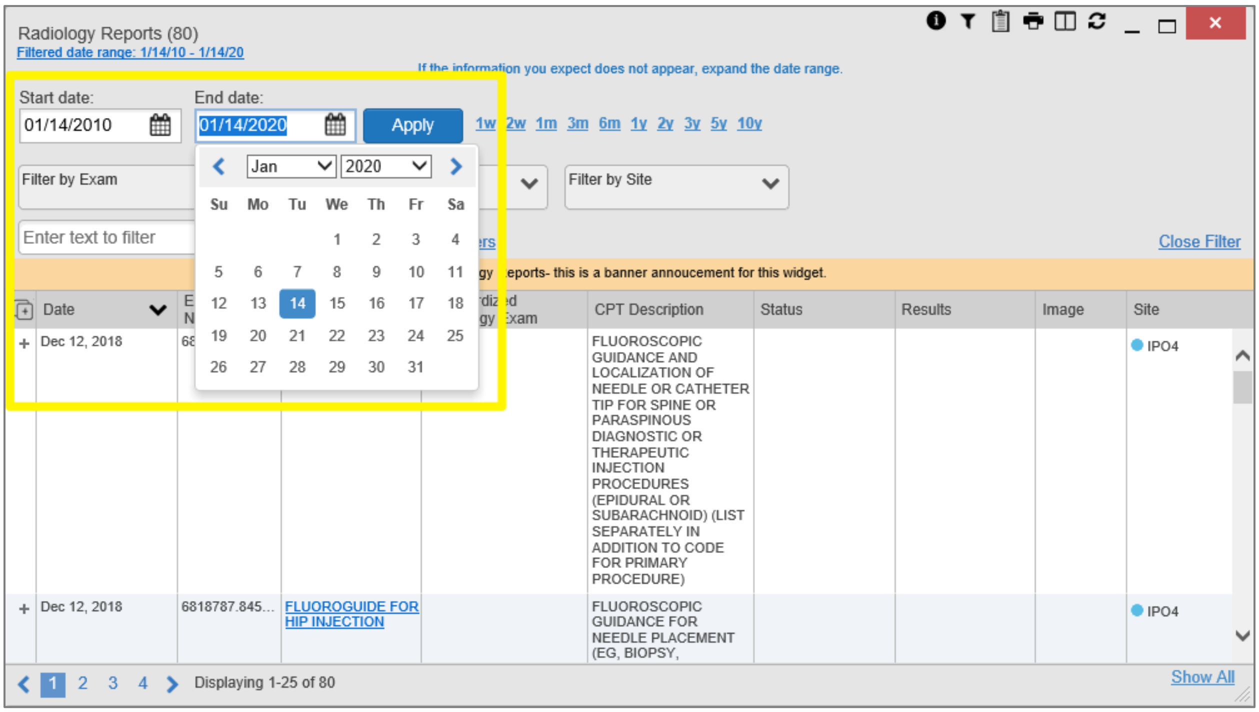
4.5.1.2. Start and End Date Filter

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

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

Figure 39 provides an example of the start and end date filter fields in the expanded view of the **Radiology Reports** widget.

Figure 39: Start and End Date Display Filter



1. Click the **Calendar** icon next to **Start Date**
2. Select a month, day, and year start date for the display filter
3. Click the **Calendar** icon next to **End Date**
4. Select the month, day, and year end date for the display filter
5. When both a start and end date have been chosen, click **Apply**
6. (Optional) Click **Cancel** to stop the query

NOTE: Prior day selections persist if you change only the month or year. If you change the month or year and the prior day value does not exist, the calendar will default to the last day of the new month. For example, changing only the month value of an existing August 31, 2018 entry to February would set the date to February 28, 2018 because there are less days in February. Similarly, if you had February 29, 2016 selected, a day which only exists in a leap year, switching the year to 2015 would set the date to February 28, 2015, the last day of the month in a standard year.

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

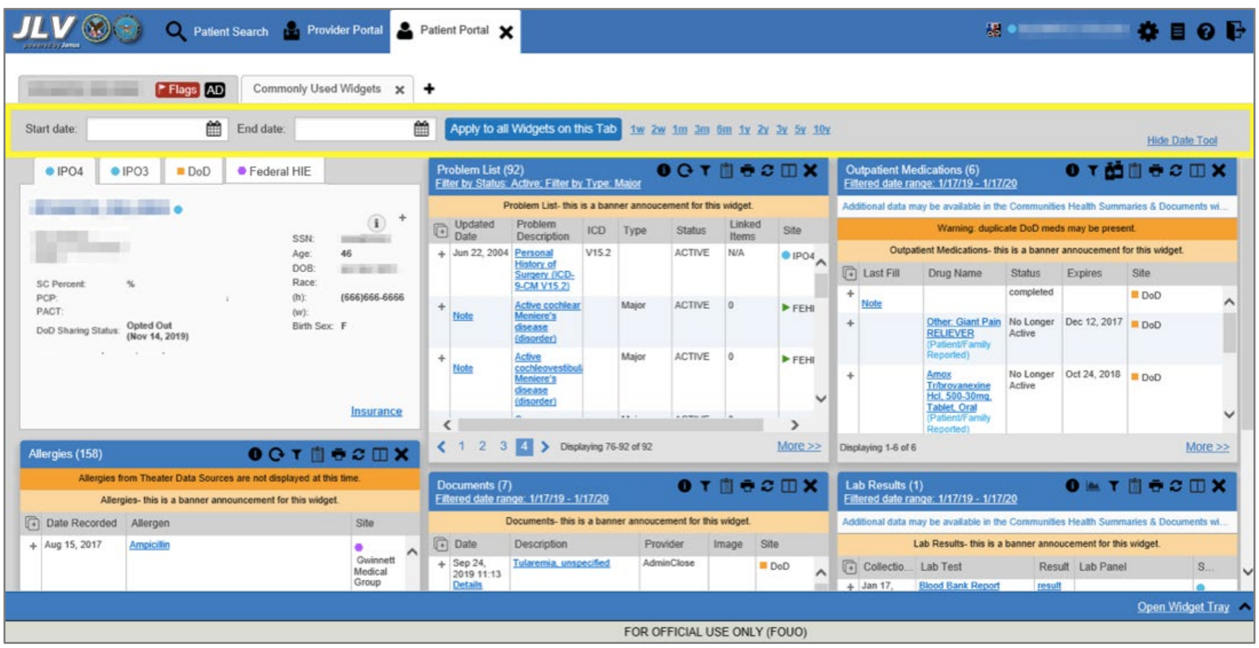
4.5.1.3. Tab Date Range Tool

All tabs in the **Patient Portal** have a **Tab Date** tool that you can use to filter all widgets on a single tab by the same date range. The **Tab Date** tool has the same **Start and End Date** and **Quick Date Range** filters available on most individual widgets, but it applies the date filter to all widgets on an individual tab.

1. Select the **Show Date Tool** hyperlink in the upper right corner of a new or existing tab
2. Enter dates in the **Start Date** and **End Date** fields, and select the **Apply to All Widgets on This Tab** button OR
3. Select a **Quick Date Range** value in the **Tab Date** tool

The **Tab Date** tool (Figure 40) is hidden by default, and it hides again automatically after you apply a date filter to the tab. Should you decide not to apply a date filter to the tab, select the **Hide Date Tool** hyperlink to hide the tab-level date filters.

Figure 40: Tab Date Tool

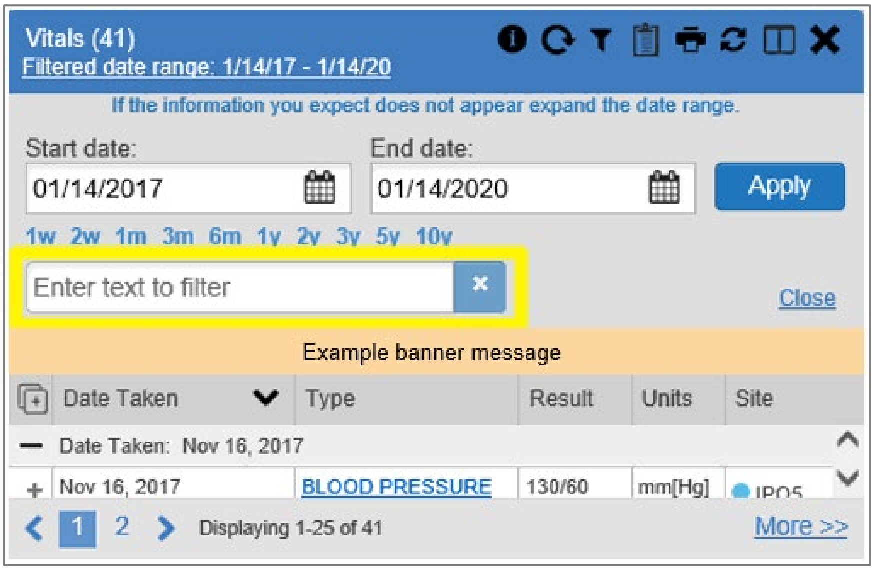


The **Tab Date** tool only filters widgets currently displayed on the active tab that support date range filtering. Widgets that display all data, without a date range, will continue to do so. Filtering only applies to widgets on the tab at the time you apply the **Tab Date** tool and will not affect new widgets added to the tab. You may still apply widget-level date filters to individual widgets after using the **Tab Date** tool. All your widget date settings will save to your profile regardless of whether they were set with the **Tab Date** tool or widget-level date filters.

4.5.2. Text Filter

Clinical data widgets on the **Patient Portal** and the **Patient Flags and Postings** dialog box provide a text filter option (Figure 41), allowing you to quickly locate relevant patient data using keywords or characters. Text filters are performed on the information displayed in all columns within a widget, including hidden columns. Filters are not performed on notes, attachments, or details associated with patient records.

Figure 41: Vitals Widget Text Filter



Click in the minimized view of a widget to display the **Enter text to filter** field. If the filter options are not displayed in the expanded view of the widget, clicking also opens the filter options. Keep in mind:

- Text filtering applies only to one widget
- Text is filtered within the subset of filtered data if a date range filter or other dropdown filters are applied within the widget
- Text filters are performed on data within all columns shown in the expanded view of the widget even if the term is entered in the text filter field of the minimized view
- Text filters entered in the minimized view of a widget persist when you open the widget in expanded view
- On widgets with site tabs, text filters entered on one site tab persist when you select other site tabs
- All records across the widget pages are filtered if the widget has multiple page views
- The **Enter text to filter** field is not case sensitive and allows up to 25 characters, including numeric and special characters
- JLV begins to filter when you pause while typing the term in the **Enter text to filter** field
- Text filtering is not available in the **Demographics** widget

4.6. Viewing Connection Status

JLV widgets display the status of their connection to VA and DoD data sources. Connection status information is available for each widget.

> **NOTE:** The Connection Status reports the condition of the connection between JLV and its external resources, while System Status reports the overall condition of the JLV application. See Viewing System Status for more information.

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

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

Figure 42 shows in the **Demographics** widget. When the Primary Care Management Module (PCMM) service is unavailable, the PCM fields in the **Demographics** widget display this error message: *"Team assignment system is currently unavailable."*

Figure 42: Demographics Widget, PCMM Connection Status Unavailable

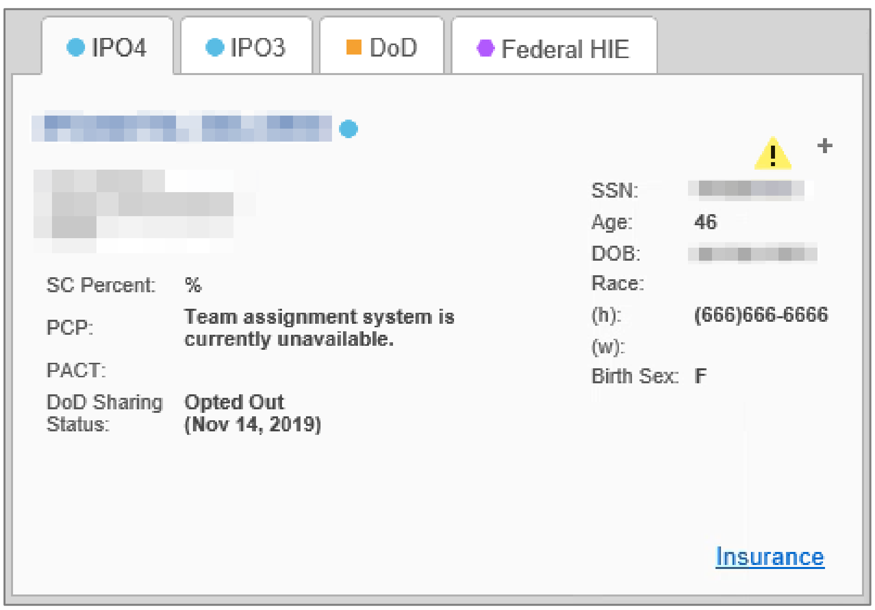
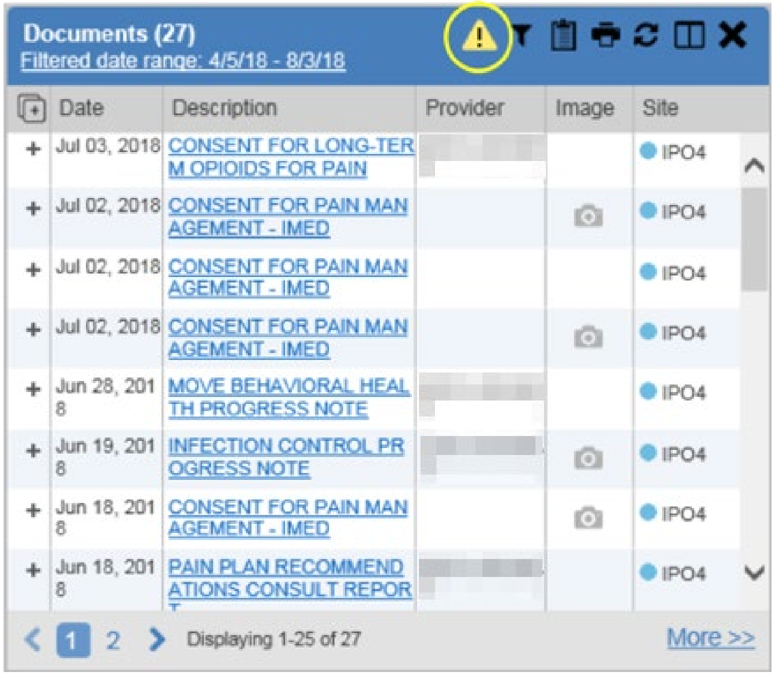


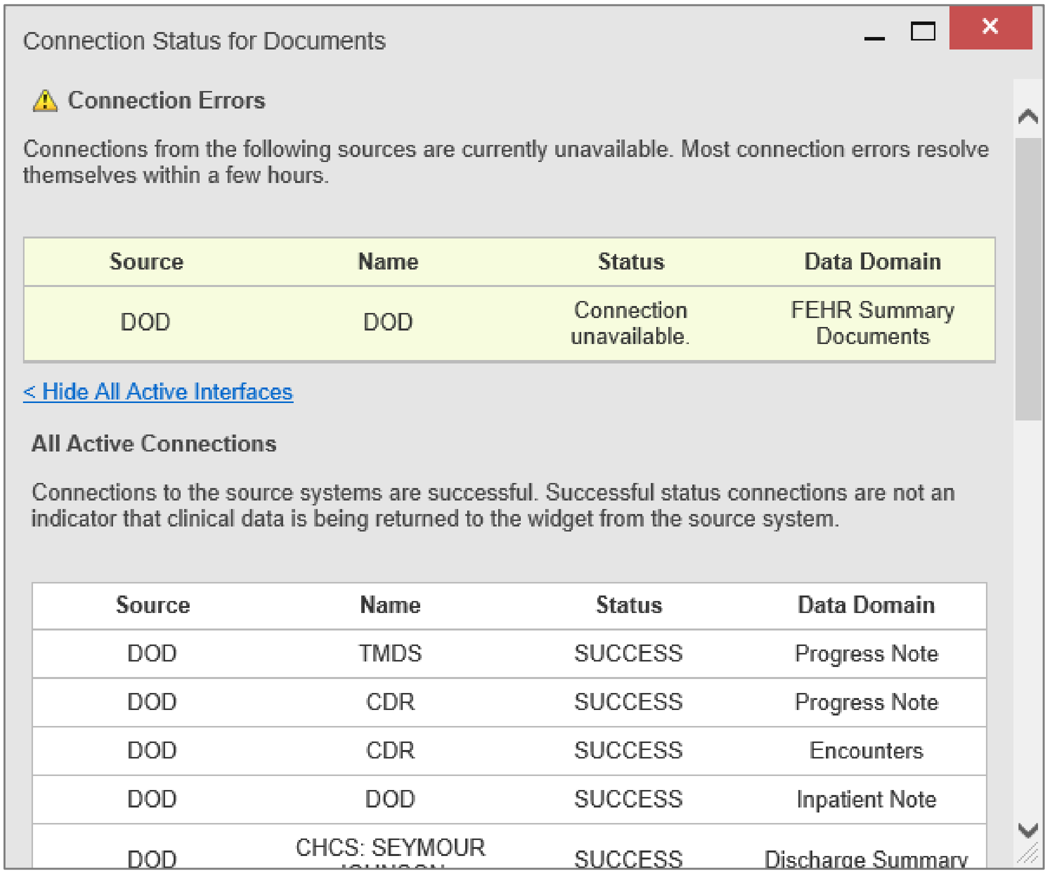
Figure 43 shows a connection status indicator icon displayed on the **Documents** widget toolbar.

Figure 43: Connection Status Indicator



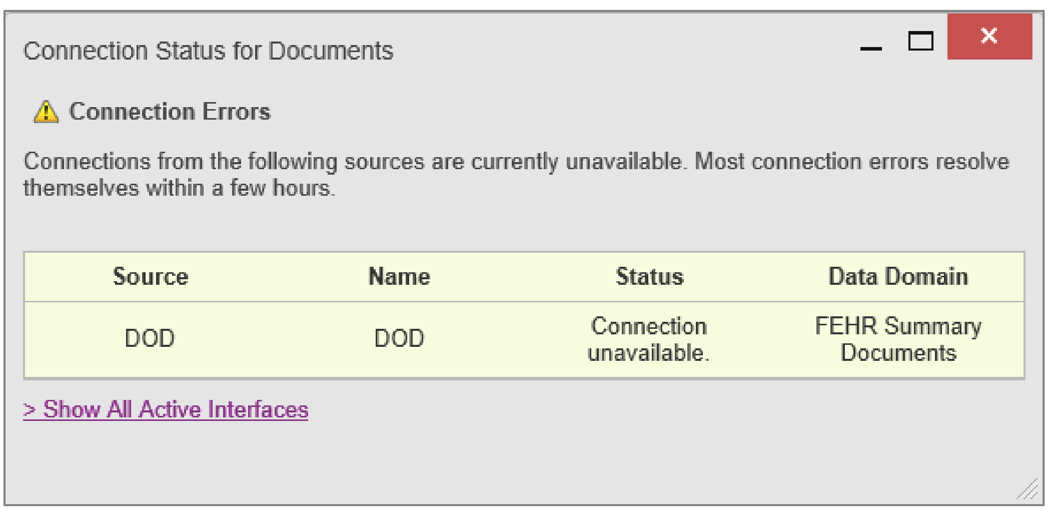
Clicking a **Connection Status** icon (Figure 43) opens a standalone window with information about the connection to data sources. Clicking the **>Hide All Active Interfaces** link (Figure 44) in the **Connection Status** window hides the detailed **All Active Connections** view and displays only the connection errors.

Figure 44: Connection Status Details



Clicking the **>Show All Active Interfaces** link in the **Connection Status** window (Figure 45) opens a **Connection Status Details** view (Figure 44).

Figure 45: Connection Status Window



4.7. Displaying Widgets on Custom Tabs

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

1. Click + beside the existing tabs on the portal page (Figure 46)
   a. The **Add Tab** dialog box opens (Figure 47)

Figure 46: Add Custom Tab Icon

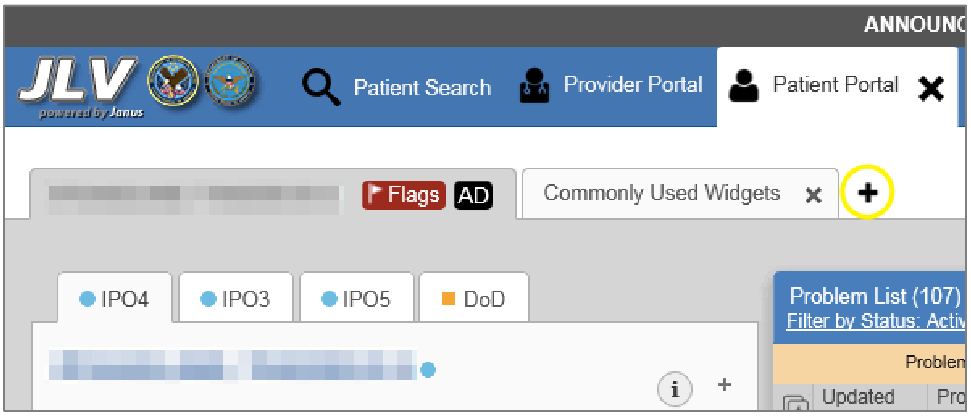
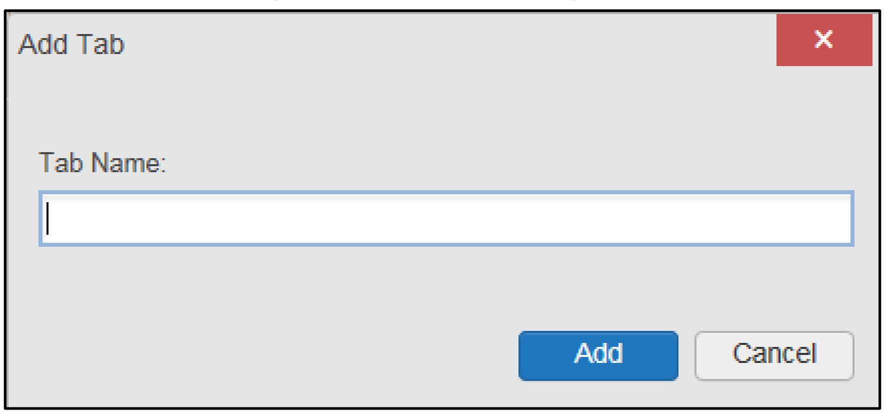


Figure 47: Add Tab Dialog Box



2. Type the name of the new tab in the **Add Tab** dialog box, and click **Add**
   a. The new tab opens with a blank workspace, with instructions on how to add widgets, and an open widget tray
3. Click, hold, and drag each of the desired widgets to the screen (max 12)
4. Click between tabs at any time, without losing each tab's configuration
   a. Tab layouts persist, even when a patient change is made
   b. Custom tabs can be renamed by double-clicking the tab name

NOTE: Tab configurations remain set until you manually change them or restore your profile to default in the **JLV Settings** dialog, which will remove all custom tabs.

4.8. Refreshing Data in a Widget

The data displayed in a widget can be refreshed by clicking the **Refresh** icon. This action retrieves data from VA and DoD sources and refreshes the individual widget's display. Widgets with integrated data from community partners also have, which specifically forces a refresh of community partner data.

4.9. Terminology Normalization

Figure 48: Terminology Specific to Widgets

Normalization Standard	Description	Widgets
Centers for Disease Control (CDC) Race Standard	Code set based on the current Federal standards to classify race and ethnicity	Patient Demographics
Current Procedural Terminology (CPT) Standard	Uniform code to describe medical, surgical, and diagnostic services	Procedures, Radiology Reports[16]
Vaccine Administered (CVX) Standard	Numeric string that identifies the type of vaccine product used	Immunizations
Logical Observation Identifiers Names and Codes (LOINC) Standard	Universal standard for identifying health measurements, observations, and documents	Documents, Lab Results, Orders, Progress Notes, Questionnaires and Deployment Assessments, Radiology Reports, Vitals
National Uniform Claim Committee (NUCC) Taxonomy Standard	Unique, 10-character alphanumeric code that identifies a provider grouping, classification, and area of specialization	Admissions, Appointments, Consult Encounters, Documents, Inpatient Medications, Inpatient Summaries, Orders, Outpatient Encounters, Outpatient Medications, Procedures, Progress Notes
RxNorm Standard	Standard names given to allergens, clinical drugs, and drug delivery devices in the United States	Allergies, Inpatient Medications, Orders, Outpatient Medications
SNOMED CT Standard	Core, general terminology used in electronic health records	Admissions, Outpatient Encounters, Problem List
X12 Health Insurance Type Standard	Defines electronic data interchange standards for health care insurance	Patient Demographics

4.10. Image Support

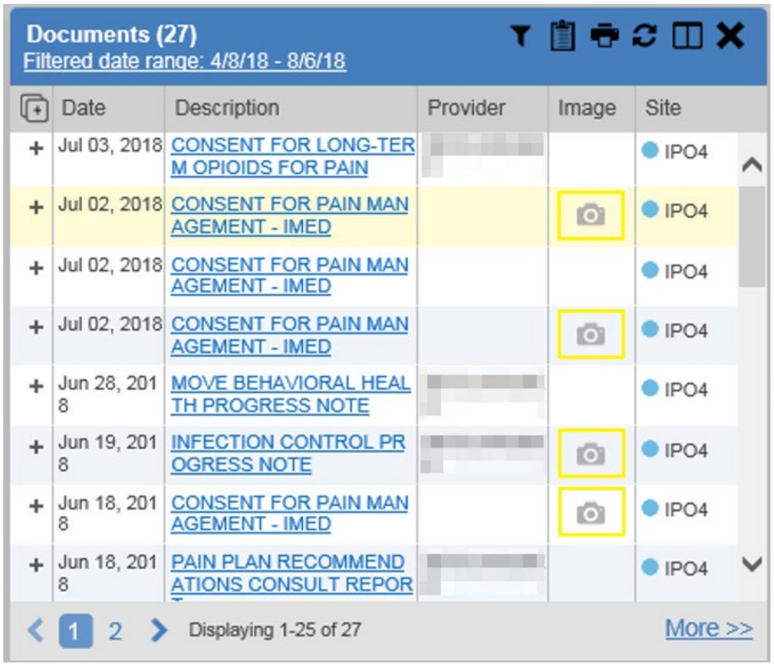
JLV integrates access to the VistA Imaging Viewer and MUSE, allowing you access to VA imaging artifacts for supported clinical domains (widgets). You can open an instance of the

[16] If LOINC mappings are not available for an entry in the Radiology Reports widget, JLV looks for CPT mappings and displays CPT normalization for standardized type and standardized code, if found.

VistA Imaging Viewer through JLV. Please see the [VistA Imaging SharePoint site] for more information regarding the VistA Imaging Viewer.

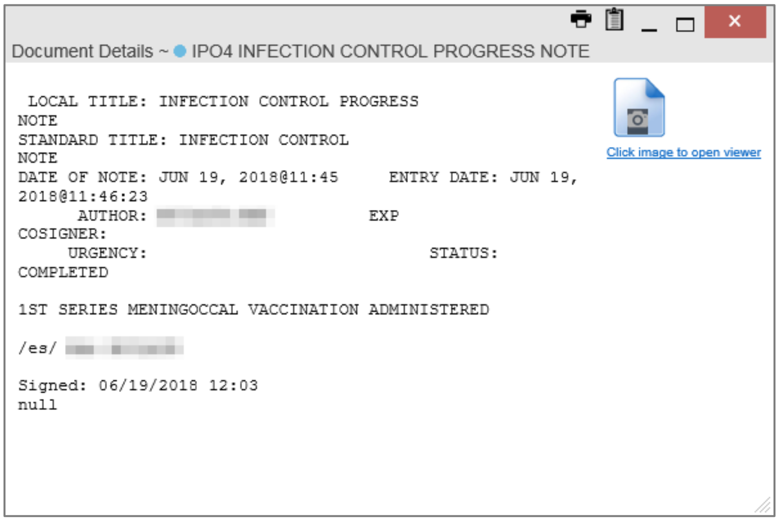
A displayed in the **Image** column ([Figure 49]) of the **Documents**, **Outpatient Encounters**, **Procedures**, **Progress Notes**, **Radiology Reports**, and **Surgery/Procedure Reports** widgets indicates that one or more images are associated with that record. Clicking within the widget opens the VistA Imaging Viewer in a standalone window and displays the associated image.

Figure 49: Camera Icon in the Image Column

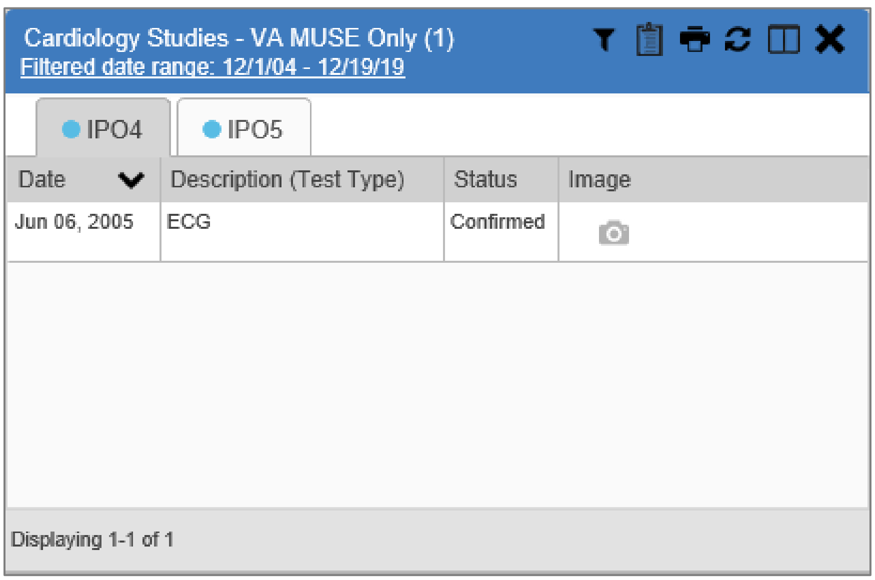


If a record has one or more images associated with it, the **Details** view of the record includes a display of a thumbnail in the upper right corner of the window ([Figure 50]). Below the thumbnail, the **Click image to open viewer** link is also displayed. Clicking either the thumbnail or the link opens the VistA Imaging Viewer and displays the associated image(s).

Figure 50: Thumbnail and Link in Details View of the Documents Widget



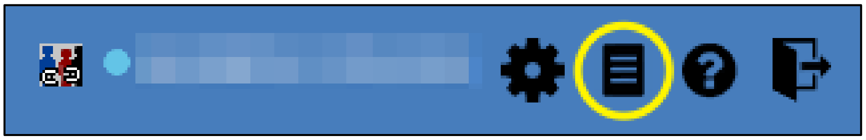
You can open images from MUSE via the dedicated **Cardiology Studies - VA MUSE Only** widget.



4.11. Using Report Builder

The **Report Builder** feature is used to create custom PDF reports using patient data and records displayed in JLV widgets. Content for reports can be selected from either the minimized or expanded view of a supported widget. **Report Builder** is accessed from the toolbar in the upper right corner of the **Patient Portal** (highlighted in Figure 51).

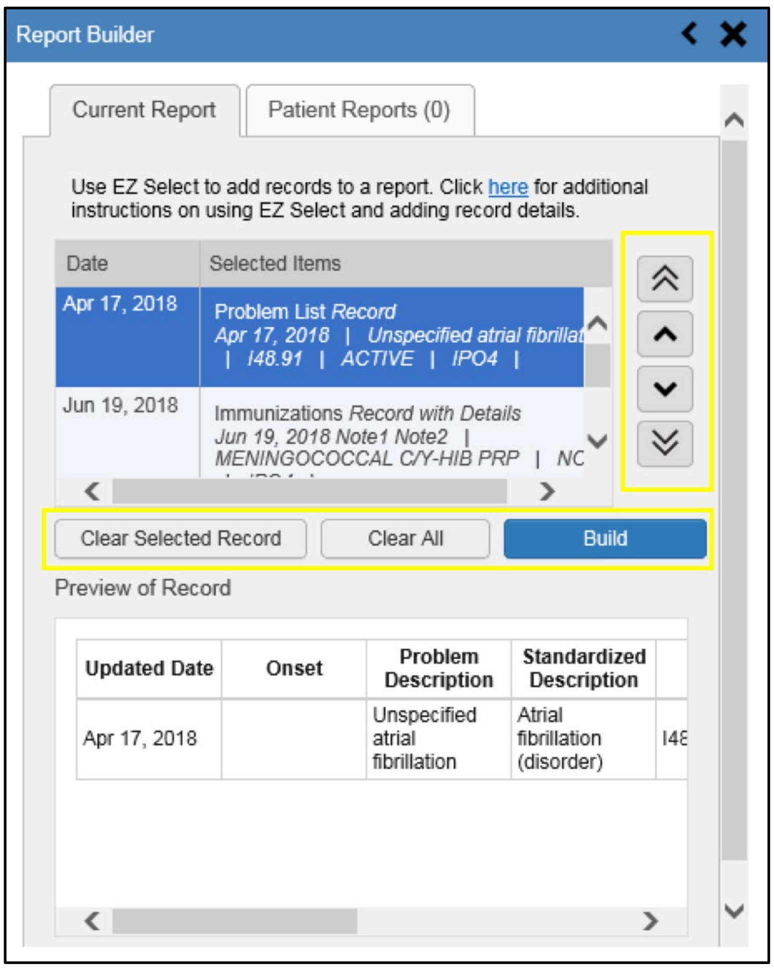
Figure 51: Report Builder Icon



The **Report Builder** pane is comprised of the **Current Report** tab (Figure 52) and the **Patient Reports** tab (Figure 53). When open, the **Report Builder** appears over the left side of the JLV portal window. Click < or > to collapse or expand the **Report Builder**. Any report configurations in progress are saved when collapsing or closing the Report Builder and restored when the Report Builder is displayed again.

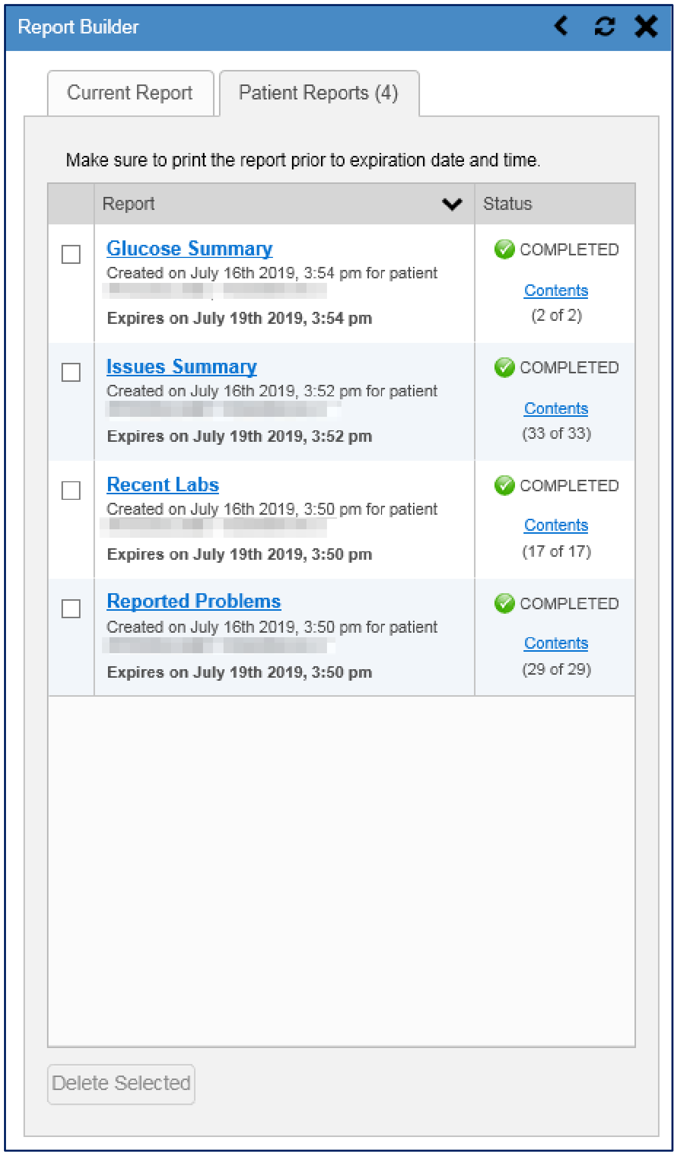
The **Current Report** tab (Figure 52) is used to build the custom report. The patient data and/or records are listed here as you select and add them. The records can be previewed and can be arranged in the desired order for the final report.

Figure 52: Current Report Tab



The **Patient Reports** tab (Figure 53) presents a list of all completed reports, the status of the report generation progress, the date the report expires, and a hyperlink to the contents of the completed report.

Figure 53: Patient Reports Tab



You can perform actions within widgets to add patient data when the Report Builder is open or closed. JLV enforces a maximum number of 50 records per report. A message appears when this limit is reached.

4.11.1. Adding One Record

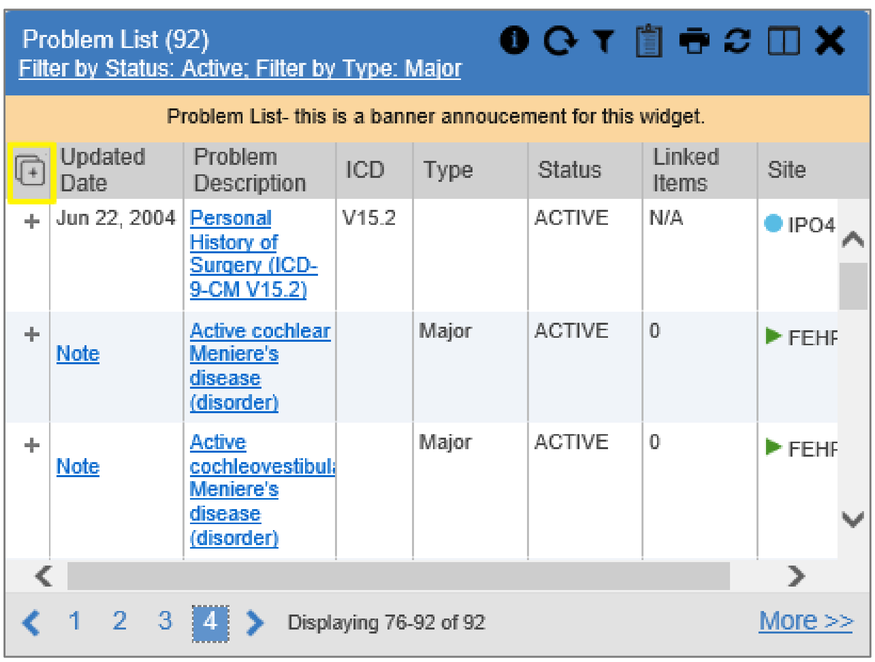
Click + icon next to a record in a widget to add data from that record to the Report Builder, including the details and notes associated with the record. + in the row changes to RB to confirm the record has been added to the Report Builder (Figure 55). This applies to both minimized and expanded widget views and the **Patient Flags and Postings** dialog box.

4.11.2. Adding Multiple Records with EZ Select

EZ Select allows you to add all records displayed on a single page of a single widget to the Report Builder with one click. Click (Figure 54) to add data from all records shown in the widget's page display to the Report Builder, including the details and notes associated with the record. EZ Select is available from the minimized and expanded views as well as the **Patient Flags and Postings** dialog box.

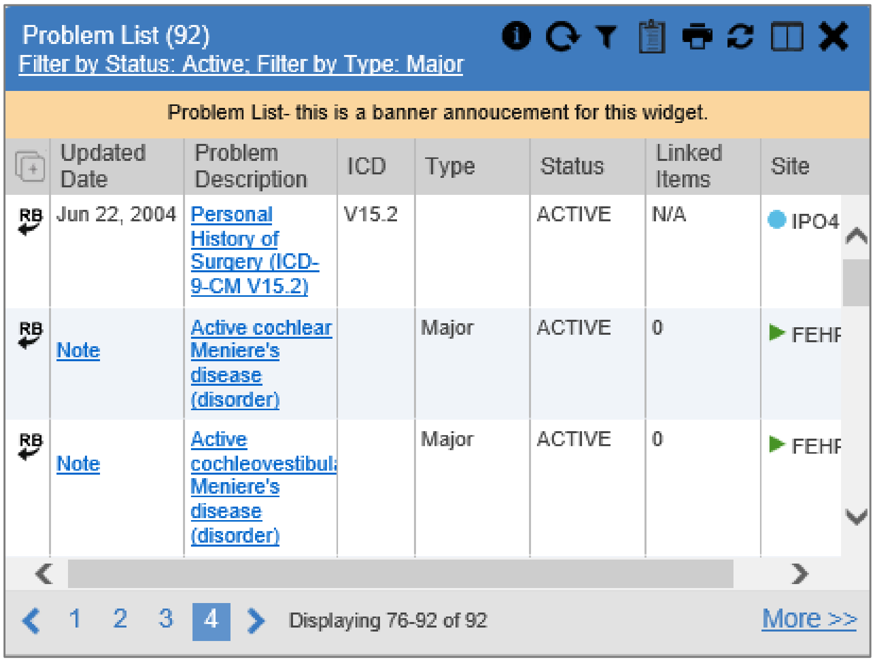
> **NOTE:** Sensitive records and Medication Administration History (MAH) / Medication Administration Log (MAL) reports accessed from the **Inpatient Medications** widget cannot be added using EZ Select. You must add them to a report one at a time, and you can only add MAH/MAL to reports from **Detail** view in the **Inpatient Medications** widget. However, you can use EZ Select to add MAH/MAL reports to Report Builder from the **Health Summaries and Reports** widget.

Figure 54: Report Builder EZ Select



+ in each row changes to to confirm the record has been added (Figure 55).

Figure 55: Records Added to Report Builder

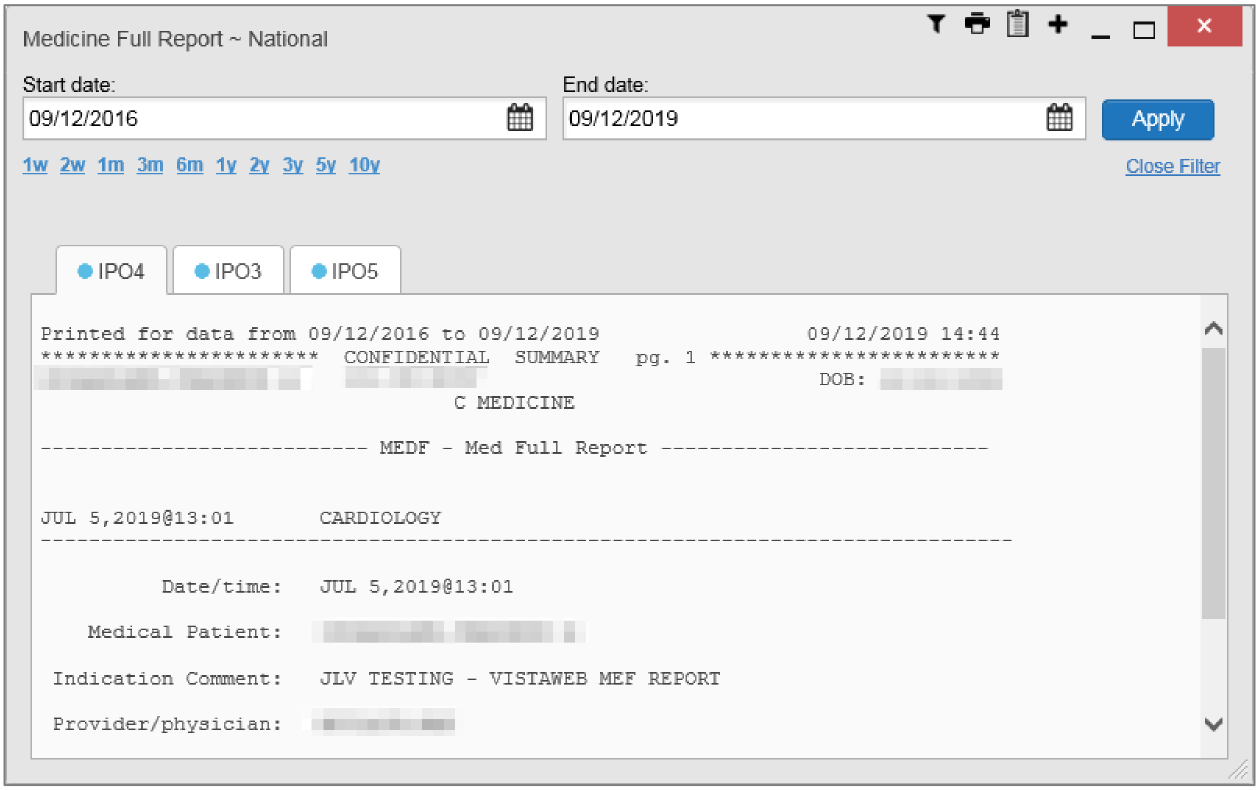


NOTE: Records previously added to a report remain in the Report Builder after a widget refresh. Clicking in the widget re-pulls clinical data, refreshes the widget data display, and resets to , even if the record has been added to the Report Builder. Records previously added to a report prior to the refresh remain in the Report Builder after a widget refresh.

4.11.3. Adding Details from Multiple Dates

When the **Details** view of a record has a date filter (Figure 56)—as in the **Health Summaries and Reports, Inpatient Medications**, and **Procedures** widgets— resets to each time you change the date range, allowing you to build date-flexible reports using records from multiple date ranges.

Figure 56: Adding Date-Flexible Details to Report Builder, Medicine Full Report



4.11.4. Adding Sensitive Records

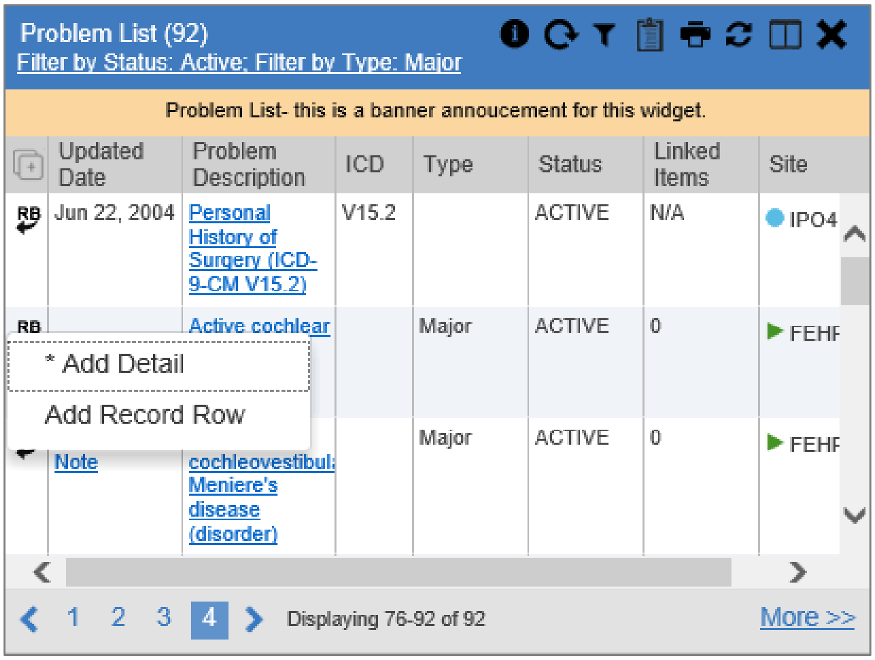
Sensitive records can be added to the Report Builder by + for a sensitive record in the widget. When prompted, click **Agree to be Audited & Access This Sensitive Record** to continue. + in the row changes to to confirm the record has been added (Figure 55). Sensitive records must be added to the Report Builder individually; therefore, repeat as necessary for additional sensitive items.

4.11.5. Adding Only Record Details or Notes

When adding records to a report using or + in the widget, JLV by default adds the data displayed in the widget as well as any details and notes associated with the record. This applies to both minimized and expanded widget views and the **Patient Flags and Postings** dialog box. If you would like to add just the details and notes or the record row data:

1. Select and hold + to access these options (Figure 57)
2. Select **Add Detail** or **Add Note** to add the details and/or notes associated with the record as well as the record row data to the Report Builder
3. Select the **Add Record Row** option to add only the data displayed in the widget display for that record and not the information provided in the details and/or notes

Figure 57: Report Builder Options

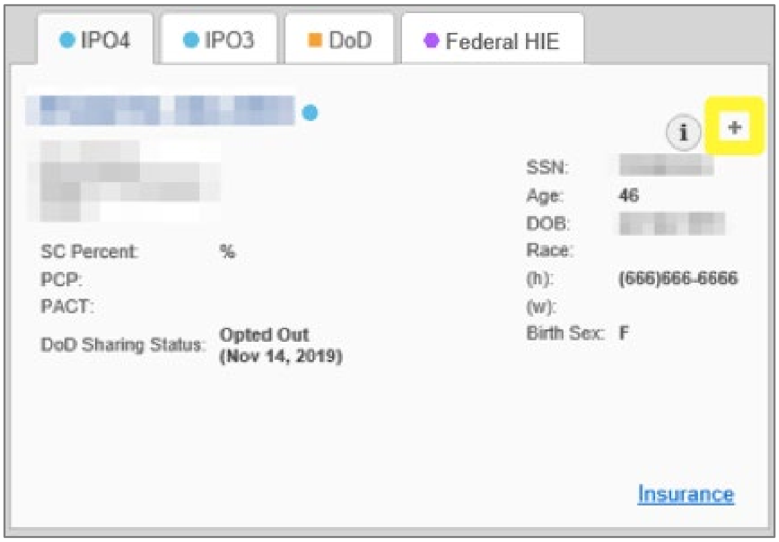


NOTE: Once you add a record to Report Builder using either the +, **Add Detail/Note,** or **Add Record Row** option, you cannot change the record data included in the report without first clearing the record from the report and adding it again.

4.11.6. Adding Patient Demographics

Clicking + in the **Demographics** widget (Figure 58) adds the patient's demographics details for that site to the Report Builder. + changes to RB to confirm the demographics data has been added. Click additional site tabs within the **Demographics** widget and repeat as desired to add demographics details from other sites within the patient's health record.

Figure 58: Demographics Widget Add to Report Builder Icon

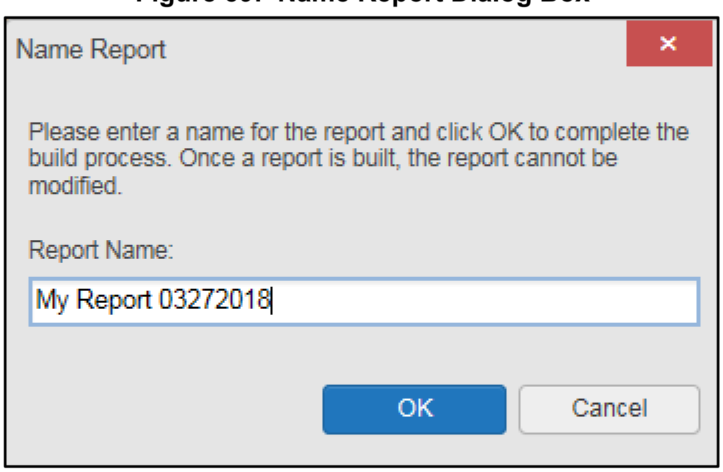


4.11.7. Generating a Report

The selected records appear in the **Report Builder** pane (Figure 52).

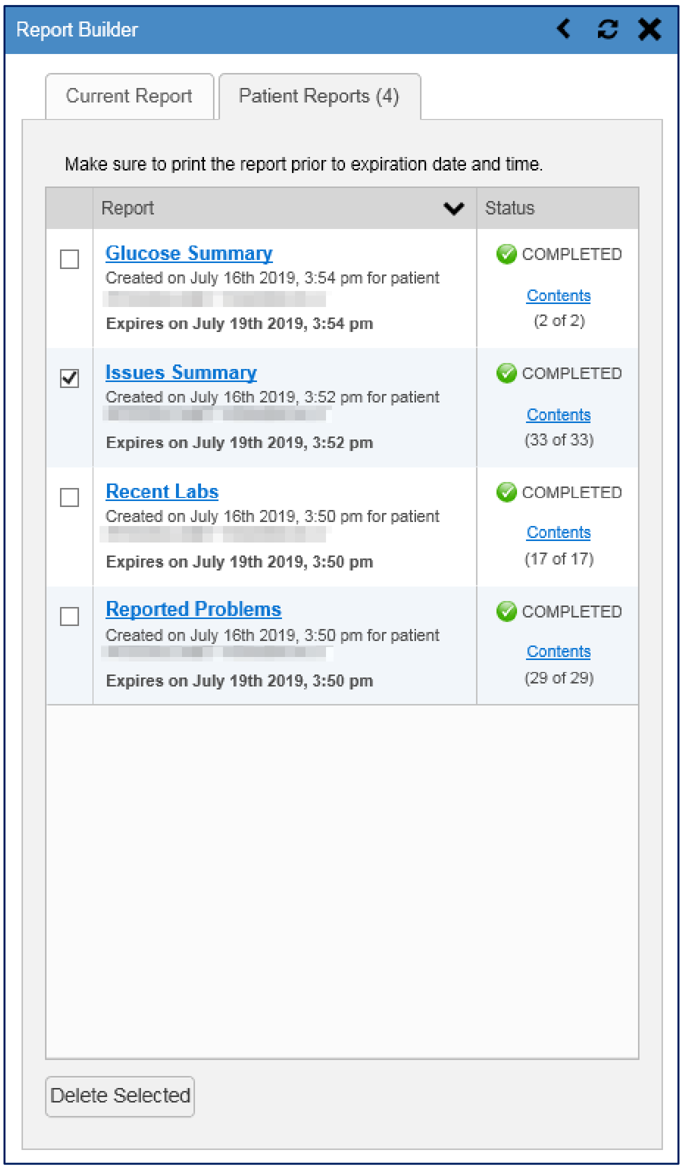
1. Use the navigation arrows to the right of the listed records to arrange the records in the desired order in the generated report
   a. Records can be removed by clicking **Clear Selected Record** or **Clear All**
2. When a record is selected for the report, it appears in the **Preview of Record** area of the **Report Builder** pane
3. Click **Build** to validate the selected records and prepare the report
   a. If a record is added to the report without an error, a **Ready** notation displays next to it in the **Status** column
   b. If a record cannot be added to the report, an **Error** notation appears next to the record
4. Name the report when prompted and click **OK** (Figure 59)

Figure 59: Name Report Dialog Box



5. The **Patient Reports** tab opens and displays a report processing indicator in the **Status** column
6. When processing is complete, the **Status** column displays either *COMPLETED* or *ERROR* (Figure 60)
    a. An *ERROR* in the **Status** column does not indicate the report failed to build, it is an indicator that one or more records could not be included in the generated report
    b. Both the *COMPLETED* and *ERROR* entries include a **Contents** link (Figure 60), which provides a list of the records that appear in the generated report

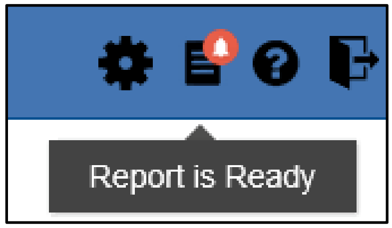
Figure 60: Patient Reports Tab Report Ready and Delete Option



    c. A report ready message appears for 6 seconds on the portal page when the report has been built and is ready to be printed (Figure 61)

d. A red icon (Figure 61) appears over the **Report Builder** icon when report builder is closed to indicate that a report is ready to be printed

Figure 61: Report Ready Message and Indicator

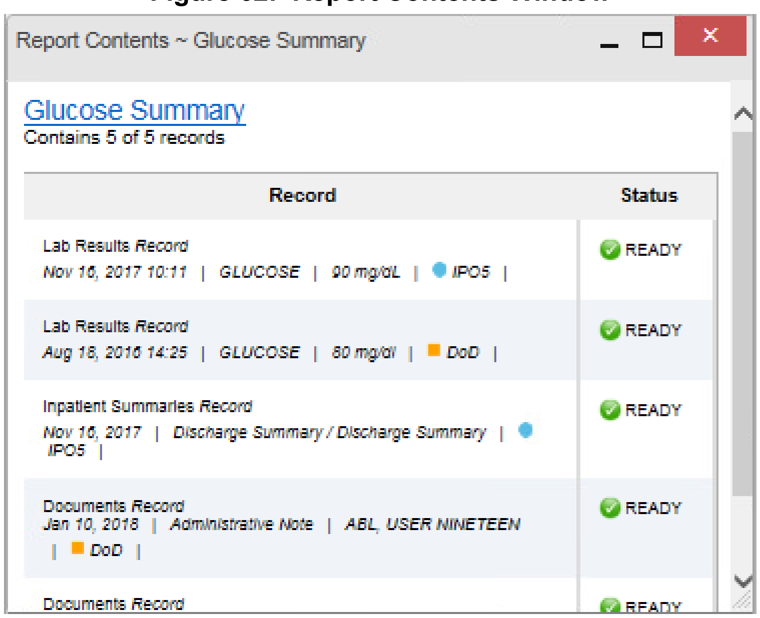


NOTE: Once a report is created, it is available on the Patient Reports tab for 72 hours. After 72 hours, the report expires, is removed from the Patient Reports tab, and can no longer be accessed.

4.11.8. Opening a Report

1. Click the report name in the **Report** column of the **Patient Reports** tab (Figure 60) OR
2. Click the **Contents** link in the **Status** column of the **Patient Reports** tab to open a list of the records included in the report in the **Report Contents** window (Figure 60) OR
3. Click the blue, hyperlinked report name in the **Report Contents** window (Figure 62)

Figure 62: Report Contents Window

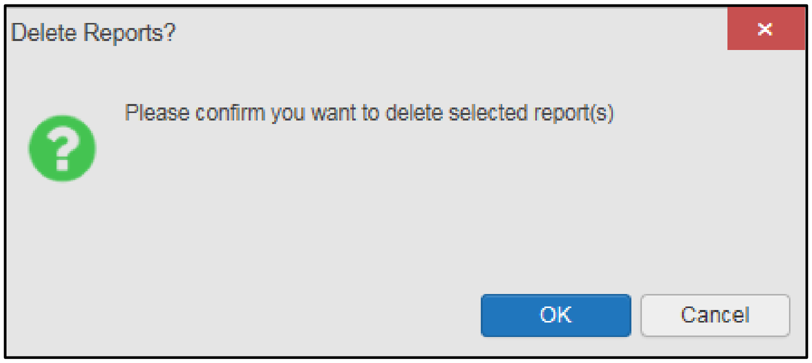


NOTE: The Report Builder prints the report content to a file in PDF format. It is recommended that you have the latest Adobe Reader installed on the system from which you access JLV to utilize the Report Builder and other JLV features.

4.11.9. Delete a Report

1. Select the checkbox to the left of the report name on the **Patient Reports** tab (Figure 60)
2. Click the **Delete Selected** button
3. Click **OK** to confirm deletion (Figure 63)

Figure 63: Delete Reports Dialog Box



4.12. Printing

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

- Click on the desired widget's toolbar to print the data list of a widget in either minimized or expanded view
- Click on the details window's toolbar to print the details window of a widget
- Click the (PDF) **Print** icon within the report window to print a report created in **Report Builder**

> **NOTE:** Each report generated using **Report Builder** includes this disclaimer: "*The information contained in this transmission may contain privileged and confidential information, including patient information protected by federal and state privacy laws.*"

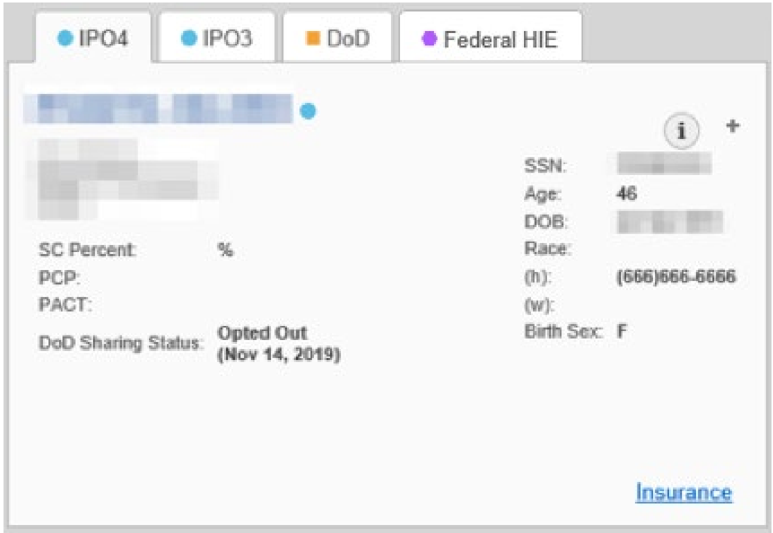
5. Widget Functionality

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

5.1. Patient Demographics Widget

The **Patient Demographics** widget displays a summary of the patient's non-clinical, personal data. The widget appears in the upper left section of the **Patient Portal** (Figure 64). The tabs above the patient's name provide a demographics summary for each site (VA or DoD) the patient has visited.

Figure 64: Patient Demographics Widget



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

- Clicking the patient's name opens details in a standalone window
- Clicking or opens the connection status details in a separate window
- Clicking Flags opens clinical flag details in a new window
- Clicking AD opens the **Advance Directives** dialog in a new window

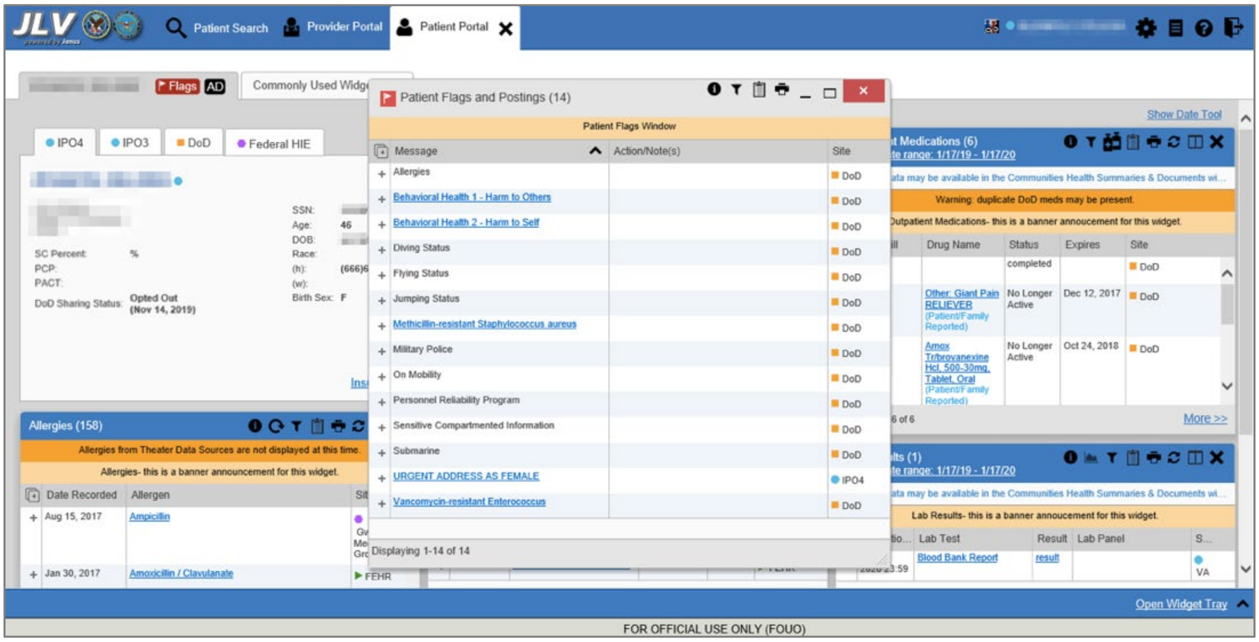
If displays on one or more tabs within the **Demographics** widget, it is an indication that the patient is not registered at that VA site or DoD facility.

5.1.1. Patient Flags and Alerts

If the patient has one or more clinical warnings, alerts, or flags in their record from VA and DoD sites, Flags displays next to the **Patient Name** tab, above the **Demographics** widget, on the **Patient Portal** (Figure 65).

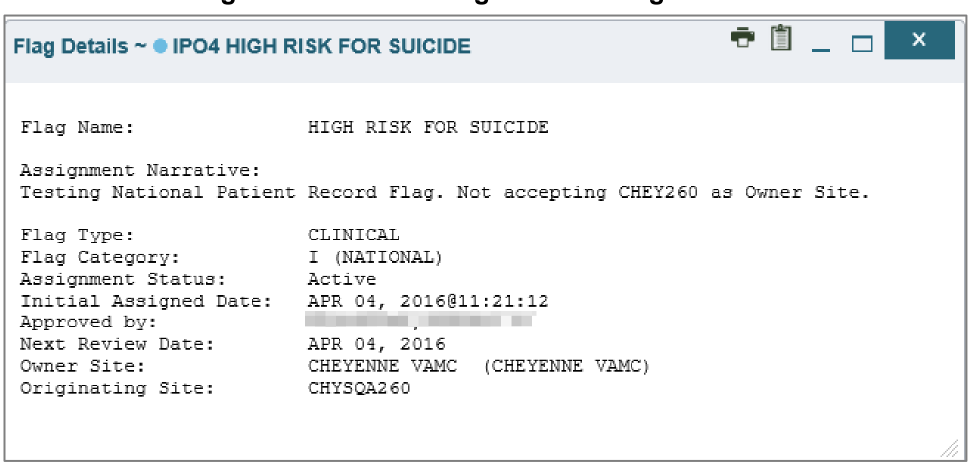
The **Patient Flags and Postings** window opens and displays by default when the **Patient Portal** opens if there are warnings associated with the selected patient.

Figure 65: Patient Flags Indicator



Click Flags to open the **Patient Flags and Postings** window (Figure 65). The window displays a list of alerts and flags within the patient's record. Selecting the hyperlinked message for each patient alert opens the Flag Details window (Figure 66). Selecting the **Action/Note(s)** link (Figure 65) will open documents pertaining to placement of the flag. If the patient's record does not contain any clinical warnings, Flags is not displayed.

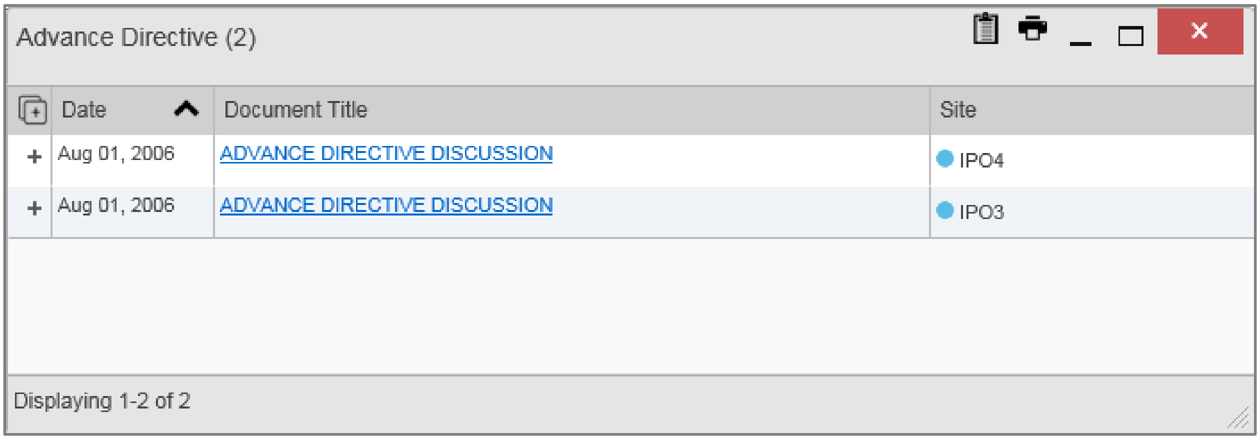
Figure 66: Patient Flags and Postings Details



5.1.2. Advance Directives

You can view Advance Directives ([Figure 67](#)) by selecting AD on **Demographics** widget. Advance Directives are pulled from DoD and VA data sources. AD changes if it is loading, and it is greyed out AD if Advance Directives were not found for the patient.

Figure 67: Advanced Directives Dialog



5.1.3. Viewing Third-Party Insurance Information

Third-party payers and insurance information is available from the **Patient Demographics** widget. Click the **Insurance** link in the **Demographics** widget.

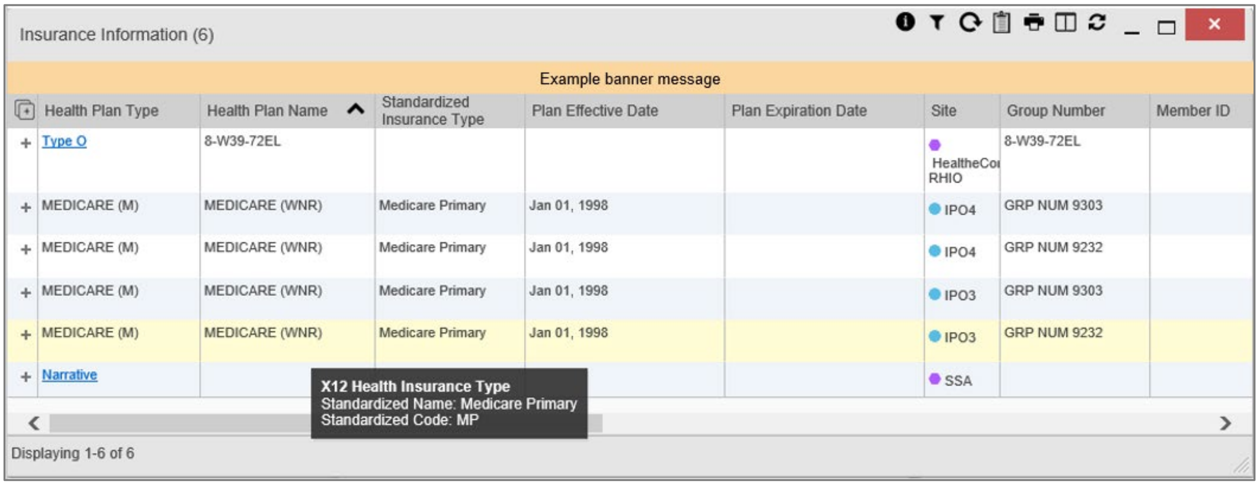
> **NOTE:** This widget displays community partner parsed data available in the patient's record if enabled in the **JLV Settings** dialog.

A new window opens with the following insurance information, some of which is displayed in [Figure 68](#):

- Health Plan Type
- Health Plan Name
- Standardized Insurance Type (See [Terminology Normalization](#) for more information.)
- Plan Effective Date
- Plan Expiration Date
- Site
- Group Number
- Member ID
- Subscriber ID
- RxBIN
- RxPCN
- Notes

- Comments
- Subscriber Date of Birth
- Subscriber's Relationship to Insurer
- Health Plan Mailing Address
- Health Plan Contact Information

Figure 68: Insurance Information



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

5.2. Documents Widget

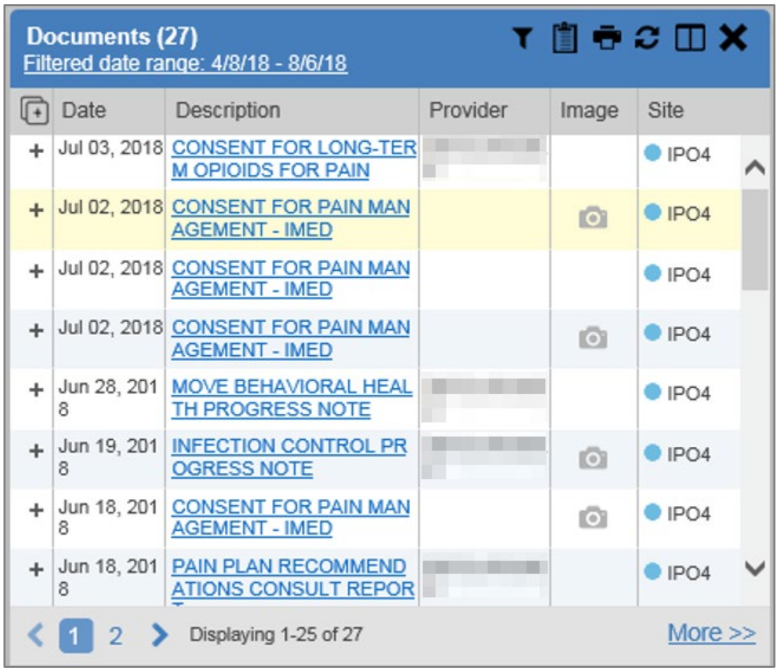
The **Documents** widget ([Figure 69]) includes documents from multiple clinical domains, including radiology reports (exams), progress notes, outpatient encounters, consult encounters, discharge summaries (inpatient notes), questionnaires, and Health Artifact and Image Management Solution (HAIMS) records. HAIMS records retrieved by JLV include scanned paper records, imported paper records, scanned non-radiology images, and imported non-radiology images, displayed in reverse chronological order by the document date.

5.2.1. Documents Widget Data

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

- Date
- Description
- Provider
- Image (See Image Support)
- Site

Figure 69: Documents Widget, Minimized View

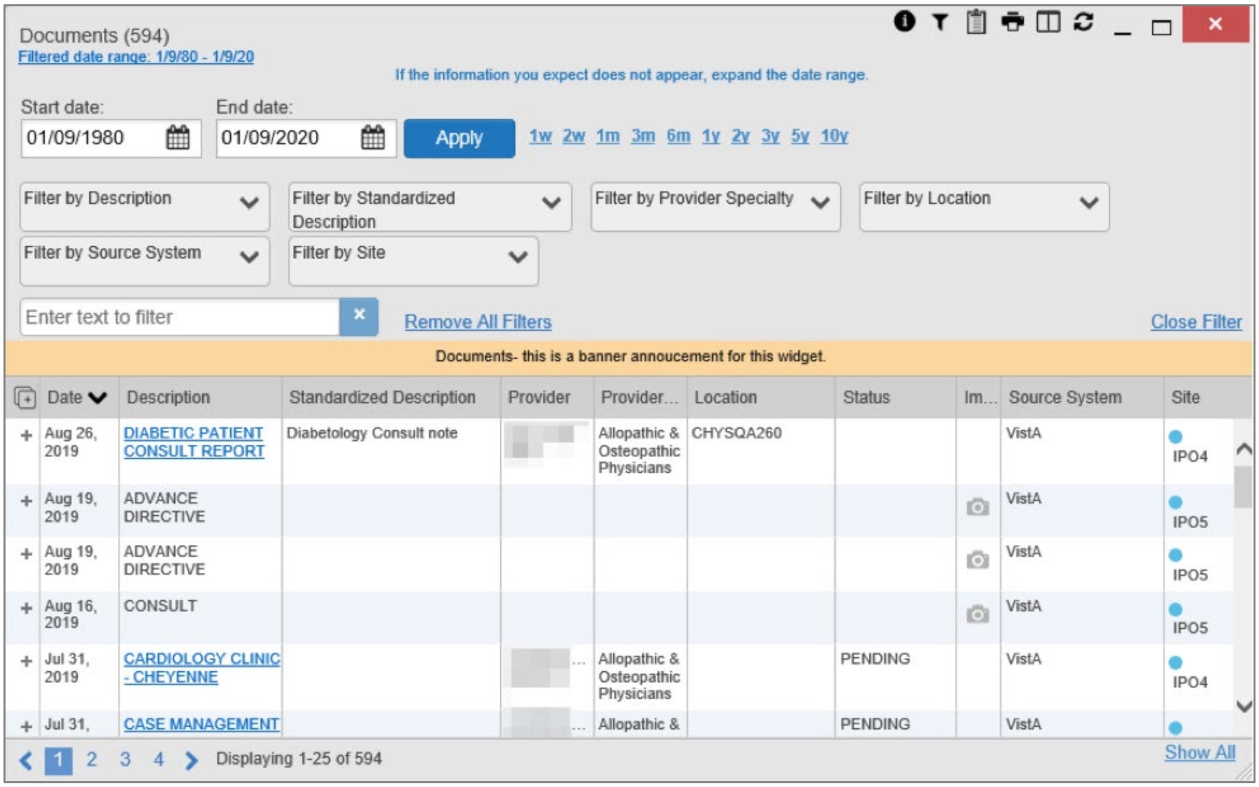


Outpatient encounter records displayed in the **Documents** widget may have a **Details** link enabled in the **Date** column. Where available, click the link to open a **Details** window for records of this type.

Click **More >>** in the minimized view of the **Documents** widget to open the expanded view (Figure 70). Information in expanded view includes:

- Date
- Description
- Standardized Description
- Provider
- Provider Specialty
- Location
- Status
- Image
- Source System
- Site

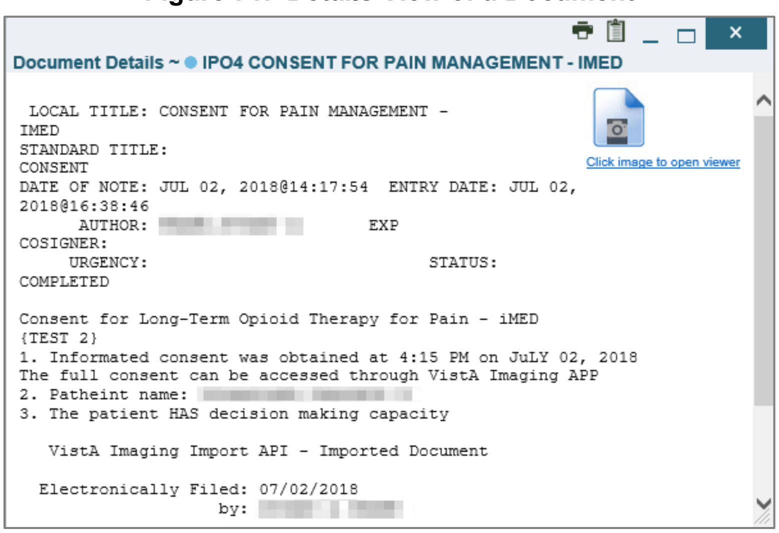
Figure 70: Documents Widget, Expanded View



5.2.2. Viewing Documents

Click a hyperlinked entry in the **Description** column in either the minimized or expanded view of the **Documents** widget to access additional information for a listed record. Depending on the record type, the additional information may open in either a **Details** window or a separate browser window. Figure 71 displays outpatient encounters details, accessed through the **Documents** widget.

Figure 71: Details View of a Document



5.3. Community Health Summaries and Documents

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

> **NOTE:** CAPRI-Claims users cannot see the **Community Health Summaries and Documents** widget.

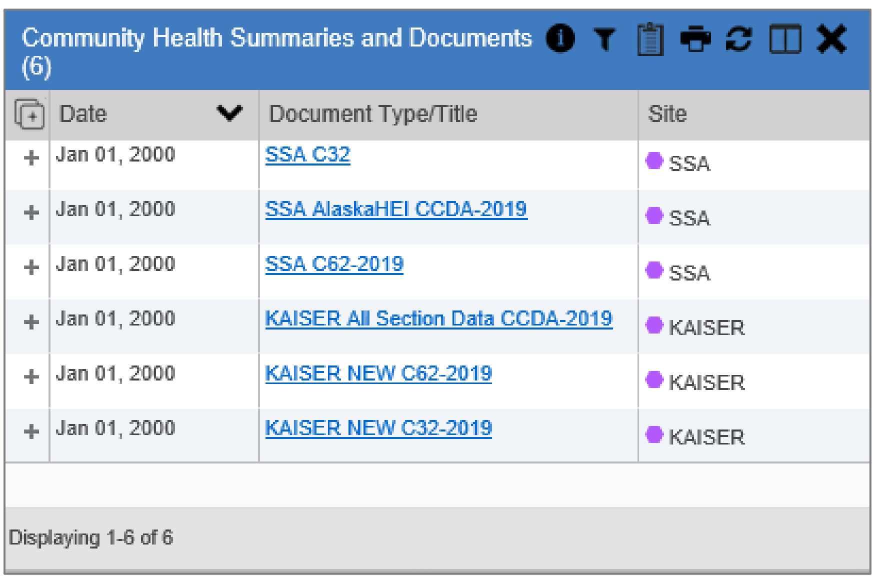
5.3.1. Community Health Summaries and Documents Widget Data

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

- Date
- Document
- Source

The purple hexagon beside entries in the **Source** column denotes the source of the data is outside the VA. The widget displays all data available 150 years into the past and 1 year into the future.

Figure 72: Community Health Summaries and Documents, Minimized View



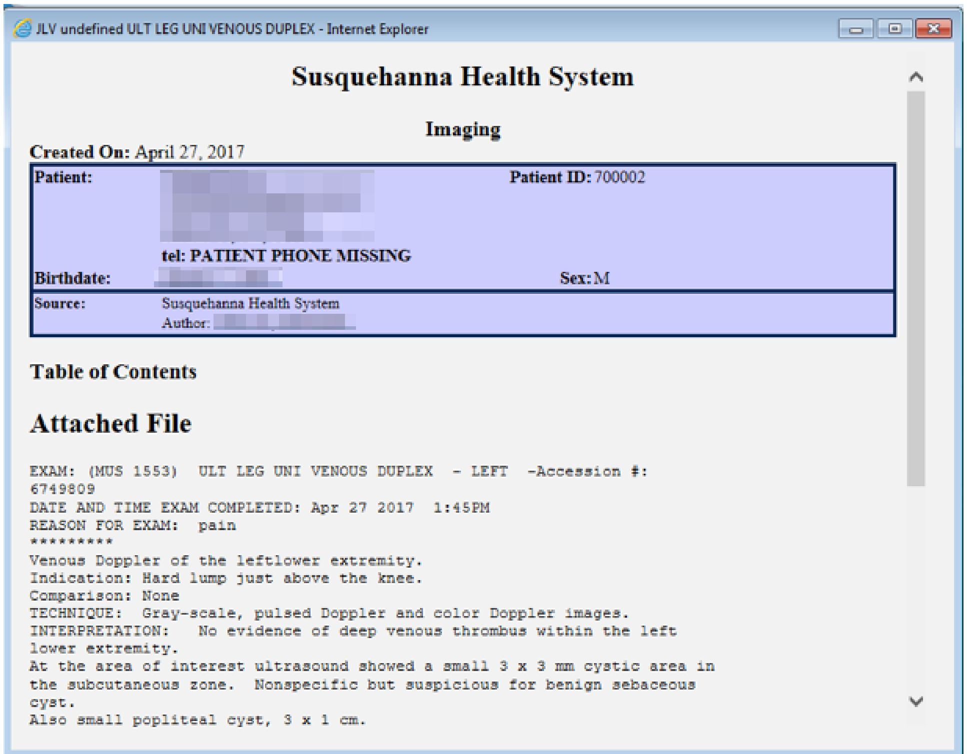
5.3.2. Viewing VA Community Health Summary Documents

The **Community and Health Summaries and Documents** widget is rendered only in minimized view. Instead of an expanded view, the selected document opens in a new browser window (Figure 73).

Figure 72 shows health summary records available from the **Document** column in the **Community Health Summaries and Documents** widget. Clicking a hyperlinked entry in the **Document** column opens the document in a separate browser tab (Figure 73).

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

Figure 73: Community Health Document



5.4. Health Summaries and Reports – VA Only Widget

5.4.1. Health Summaries and Reports – VA Only Widget Data

The **Health Summaries and Reports – VA Only** widget displays the patient's national and local health summaries from VA sites where the patient has been registered, including the Autopsy, Blood Bank, Cytopathology, Lab Summary—Cumulative, MAH[17], MAL[18], Medicine Full, Surgical Pathology, Transfers, and Unit Dose reports. This widget is available to VA users only.

JLV sorts records by **Site** by default. If a patient has national health summaries, JLV displays records of National type at the top of the widget. National records are named in the **Site** column in the minimized view and in the **Type** and **Site** columns in the expanded view.

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

[17] Limited to any 7-day period
[18] Limited to any 14-day period

Information in the minimized view of the **Health Summaries and Reports – VA Only** widget (Figure 74) includes:

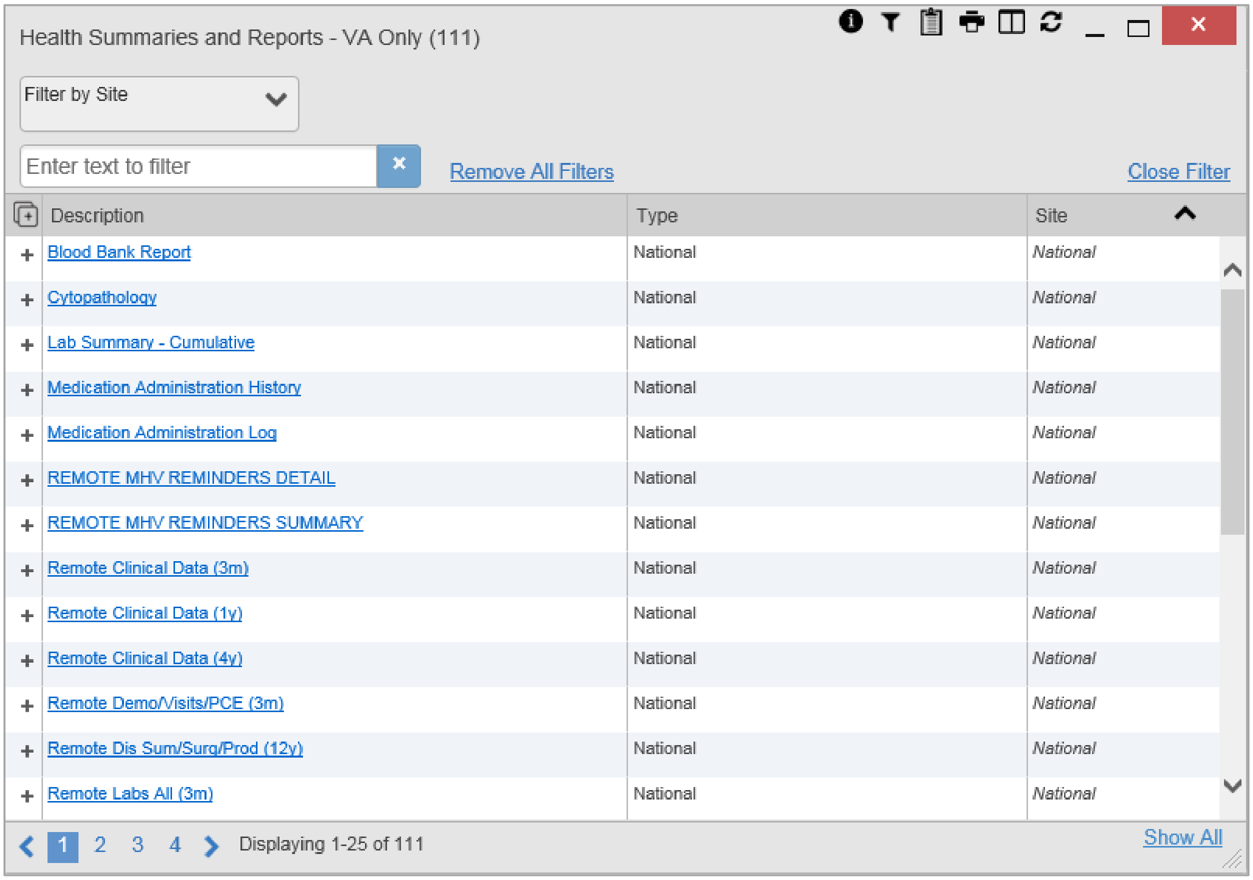
- Description
- Site

Figure 74: Health Summaries and Reports - VA Only Widget, Minimized View

Click **More >>** from the minimized view of the **Health Summaries and Reports – VA Only** widget to open an expanded view of the widget. Information in the expanded view (Figure 75) includes:

- Description
- Type
- Site

Figure 75: Health Summaries and Reports - VA Only Widget, Expanded View

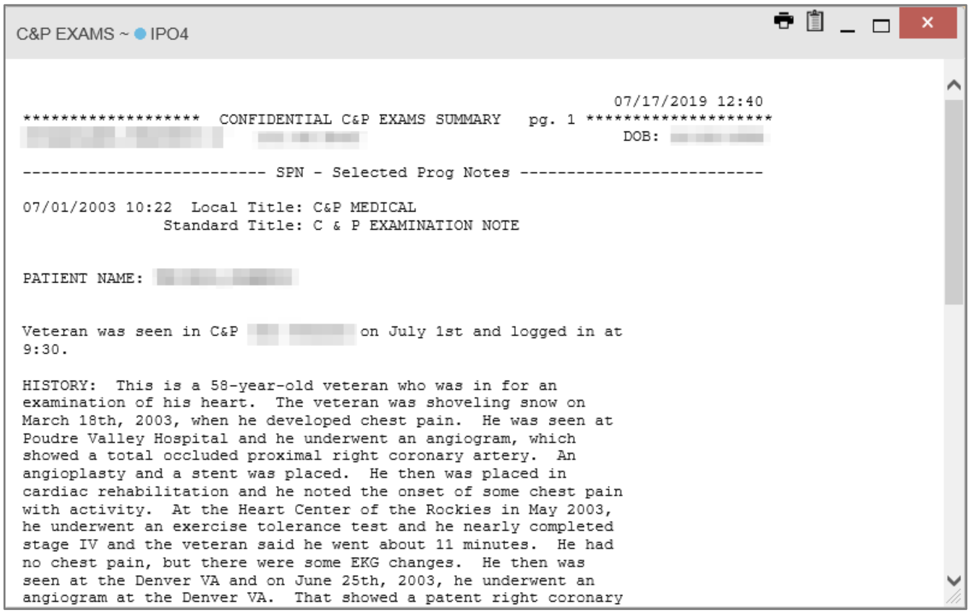


5.4.2. Viewing Health Summaries

Click a hyperlinked entry in the **Description** column of either the minimized or expanded view of the **Health Summaries and Reports – VA Only** widget to view additional information for the record. This widget is available to VA users only.

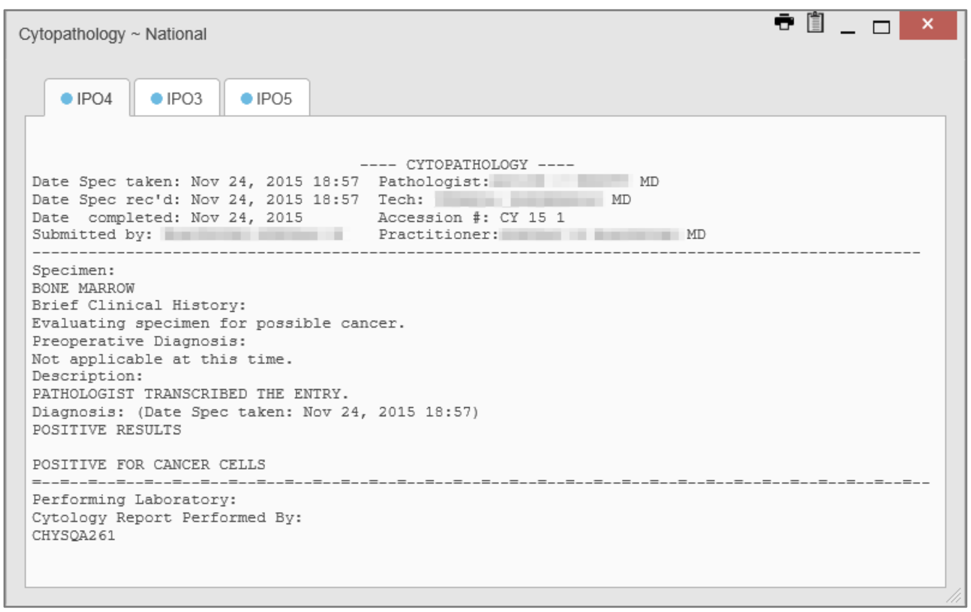
Figure 76 displays a health summary record exported from a single, local site.

Figure 76: Health Summary from a Single, Local Site



[Figure 77](#) is an example of JLV's display of a national health summary. Within the window, tabs represent the VistA sites where the patient is registered. Click each tab to view patient records for that site.

Figure 77: National Health Summary, Multiple Sites



5.5. Lab Results Widget

5.5.1. Lab Results Widget Data

The **Lab Results** widget displays the patient's lab results information, as well as skin test data and blood transfusion history when available in the patient's record. The information is displayed in reverse chronological order by collection date. Lab data received by DoD sources that include a sensitive flag are masked in the widget views and access to this data is subject to auditing. Additional data may be available in the Community Health Summaries and Documents widget.

The lab results information in the minimized view of the **Lab Results** widget includes:

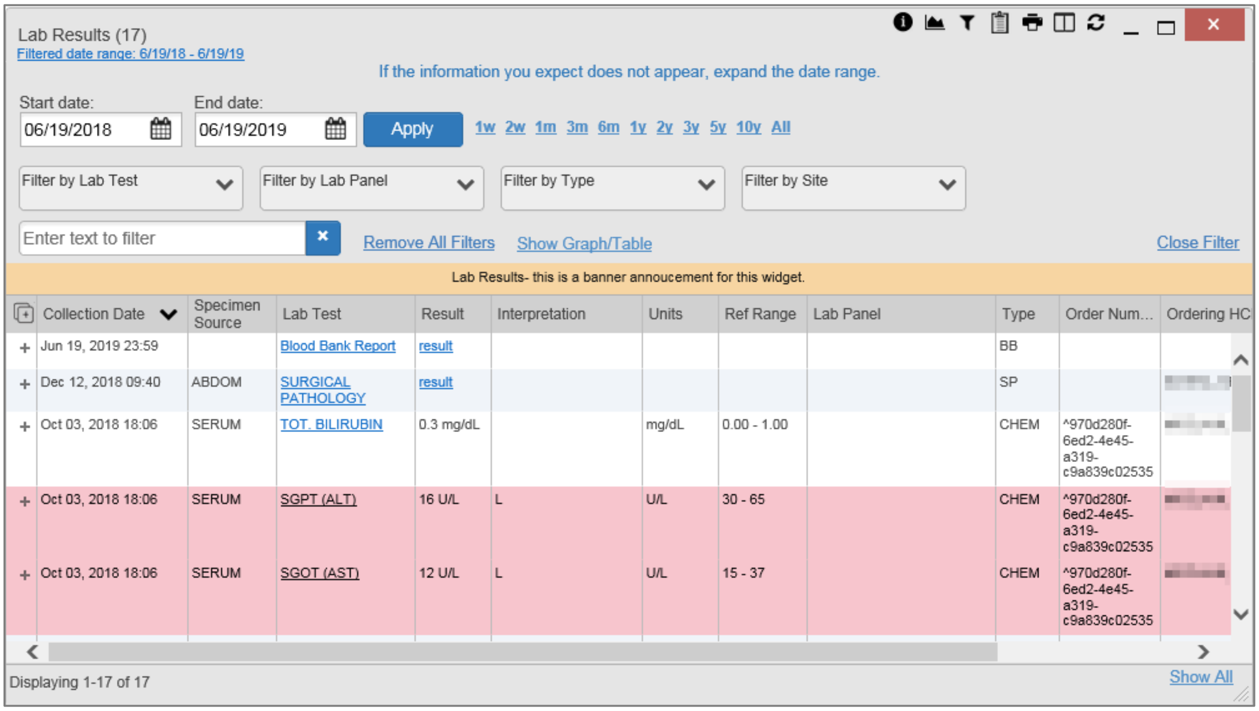
- Collection Date
- Lab Test
- Result
- Lab Panel
- Site

Click **More >>** from the minimized view of the **Lab Results** widget to open the expanded view (Figure 78). The lab results information in the expanded view includes:

- Collection Date
- Specimen Source
- Lab Test
- Result
- Interpretation
- Units
- Ref Range
- Lab Panel
- Type
- Order Number
- Ordering HCP
- Status
- Site

NOTE: While the **Standardized Lab Test** and **Ordering HCP Specialty** columns are not listed by default, you may add them to the expanded view by selecting their corresponding checkboxes in .

Figure 78: Lab Results Widget, Expanded View



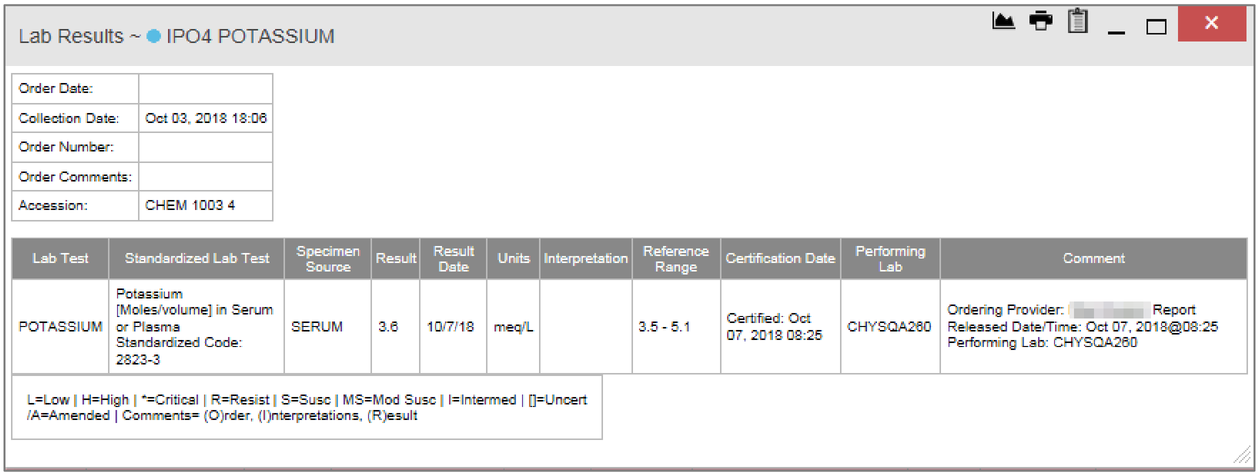
The following lab test abbreviations are used in the **Type** column of the expanded view. Hovering over an entry in the **Type** column displays the full lab type name.

- CHEM for CH, COAG, HEM, HE, TOX, RIA, SER, and SEND
- MICRO for MI, MICROBIOLOGY, and BACT
- AP for ANATOMIC PATHOLOGY
- EM for ELECTRON MICROSCOPY
- SP for SURGICAL PATHOLOGY
- ST for SKIN or SKIN TEST
- CY for CYTOLOGY
- AU for AUTOPSY
- BB for BLOOD BANK
- H.I.V for HIV

5.5.2. Viewing Lab Results Details

Clicking a hyperlinked entry in the **Lab Test** column of the **Lab Results** widget opens a separate window containing a report of the record (Figure 79).

Figure 79: Lab Results Details



Order Date:	
Collection Date:	Oct 03, 2018 18:06
Order Number:	
Order Comments:	
Accession:	CHEM 1003 4

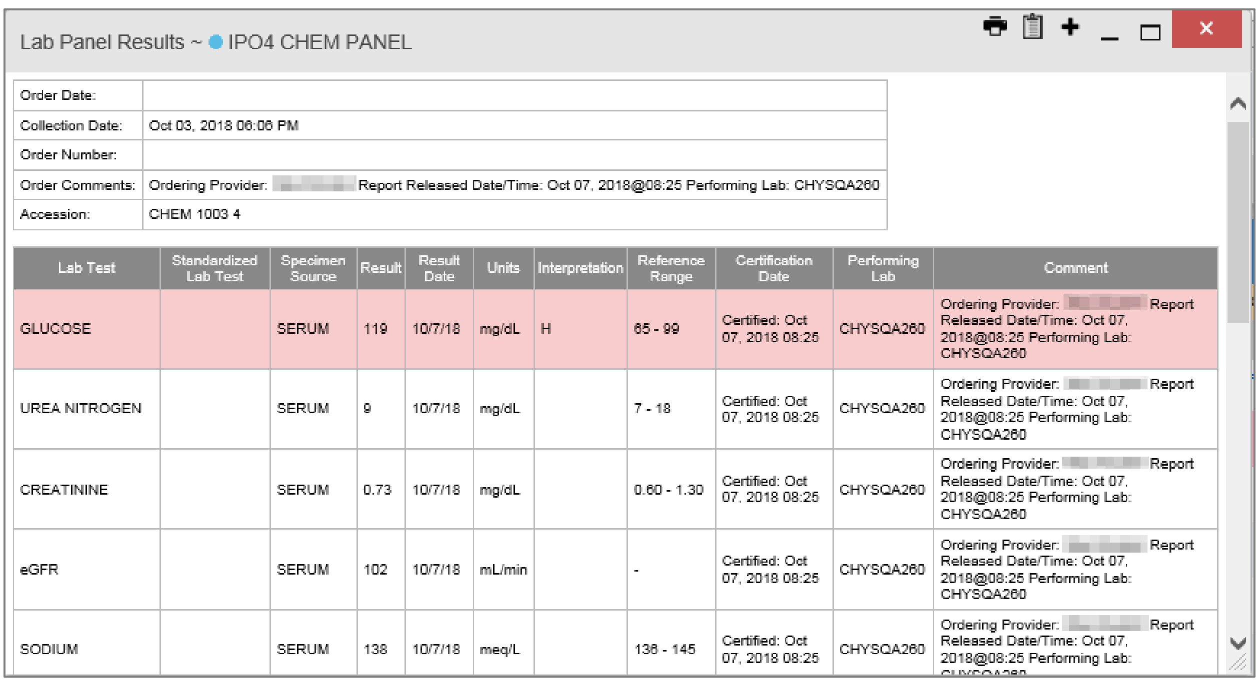
Lab Test	Standardized Lab Test	Specimen Source	Result	Result Date	Units	Interpretation	Reference Range	Certification Date	Performing Lab	Comment
POTASSIUM	Potassium [Moles/volume] in Serum or Plasma Standardized Code: 2823-3	SERUM	3.6	10/7/18	meq/L		3.5 - 5.1	Certified: Oct 07, 2018 08:25	CHYSQA260	Ordering Provider: [redacted] Report Released Date/Time: Oct 07, 2018@08:25 Performing Lab: CHYSQA260

L=Low \| H=High \| *=Critical \| R=Resist \| S=Susc \| MS=Mod Susc \| I=Intermed \| []=Uncert /A=Amended \| Comments= (O)rder, (I)nterpretations, (R)esult

5.5.3. Viewing Lab Panel Results Details

Clicking a hyperlinked entry in the **Lab Panel** column of the **Lab Results** widget opens a separate window containing a detailed lab panel report (Figure 80).

Figure 80: Lab Panel Results Detail



Order Date:	
Collection Date:	Oct 03, 2018 06:06 PM
Order Number:	
Order Comments:	Ordering Provider: [redacted] Report Released Date/Time: Oct 07, 2018@08:25 Performing Lab: CHYSQA260
Accession:	CHEM 1003 4

Lab Test	Standardized Lab Test	Specimen Source	Result	Result Date	Units	Interpretation	Reference Range	Certification Date	Performing Lab	Comment
GLUCOSE		SERUM	119	10/7/18	mg/dL	H	65 - 99	Certified: Oct 07, 2018 08:25	CHYSQA260	Ordering Provider: [redacted] Report Released Date/Time: Oct 07, 2018@08:25 Performing Lab: CHYSQA260
UREA NITROGEN		SERUM	9	10/7/18	mg/dL		7 - 18	Certified: Oct 07, 2018 08:25	CHYSQA260	Ordering Provider: [redacted] Report Released Date/Time: Oct 07, 2018@08:25 Performing Lab: CHYSQA260
CREATININE		SERUM	0.73	10/7/18	mg/dL		0.60 - 1.30	Certified: Oct 07, 2018 08:25	CHYSQA260	Ordering Provider: [redacted] Report Released Date/Time: Oct 07, 2018@08:25 Performing Lab: CHYSQA260
eGFR		SERUM	102	10/7/18	mL/min		-	Certified: Oct 07, 2018 08:25	CHYSQA260	Ordering Provider: [redacted] Report Released Date/Time: Oct 07, 2018@08:25 Performing Lab: CHYSQA260
SODIUM		SERUM	138	10/7/18	meq/L		136 - 145	Certified: Oct 07, 2018 08:25	CHYSQA260	Ordering Provider: [redacted] Report Released Date/Time: Oct 07, 2018@08:25 Performing Lab:

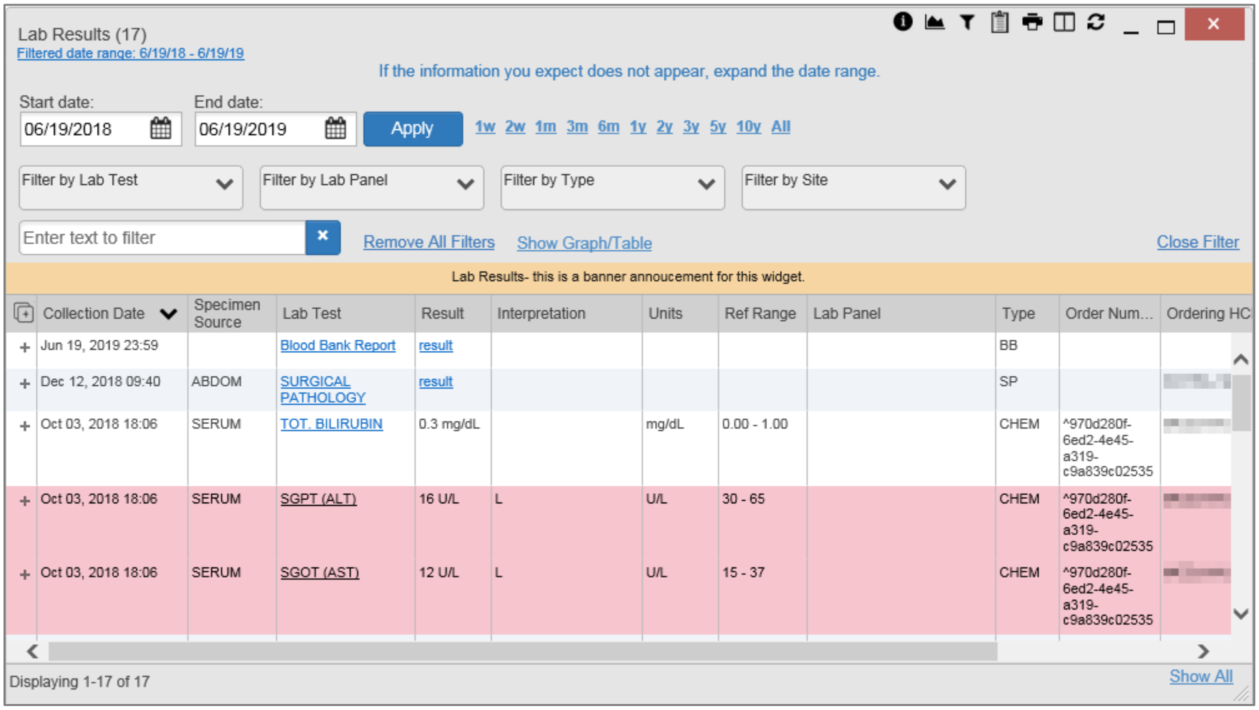
5.5.4. Viewing Abnormal Results in the Lab Results Widget

JLV highlights the row for that record in the minimized and expanded views of the widget for records in the **Lab Results** widget where result values fall within a calculated reference range for abnormal.

Pink highlighting represents an abnormal result (i.e., high (H) or low (L)). Red highlighting represents that the abnormal indicator has an asterisk (i.e., H* or L*) or the result is critical.

Examples of records with abnormal results are shown in the expanded view of the **Lab Results** widget in Figure 81.

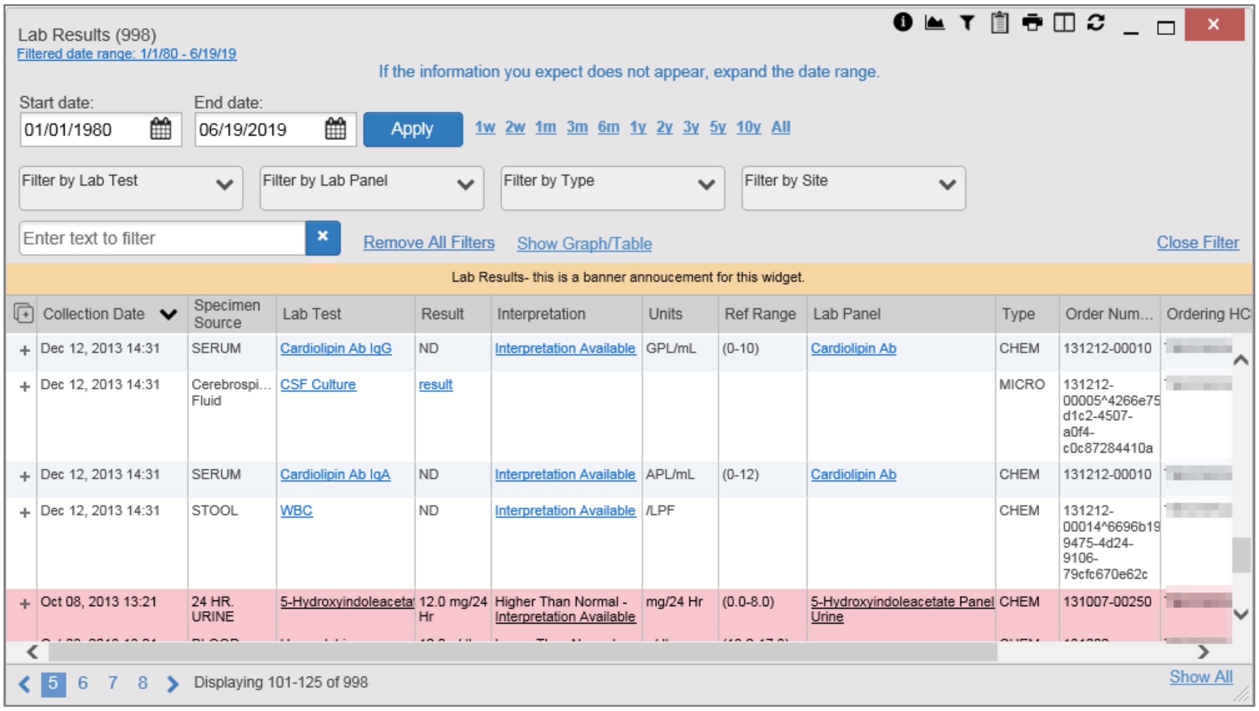
Figure 81: Lab Results Widget, Abnormal Results in Expanded View



5.5.5. Viewing Results and Interpretations in the Lab Results Widget

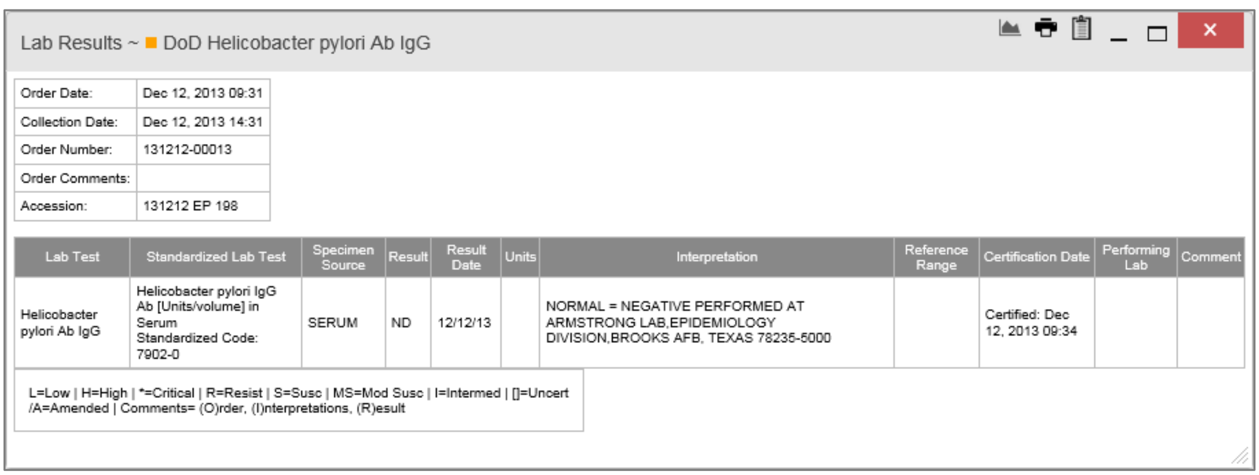
JLV displays links in the **Result** and **Interpretation** columns in the expanded views of the widget to indicate additional information is available for records in the **Lab Results** widget where result values and interpretation are available in a record. Figure 82 highlights multiple result and interpretation links within the widget.

Figure 82: Lab Results Widget, Expanded View, Interpretations Available



[Figure 83](#) displays an example lab interpretation accessed by clicking a link in the **Interpretation** column. The contents of the window may vary depending on the lab type and what is contained in the patient record.

Figure 83: Lab Results Interpretation Details



5.5.6. Graph/Table View from the Lab Results Widget

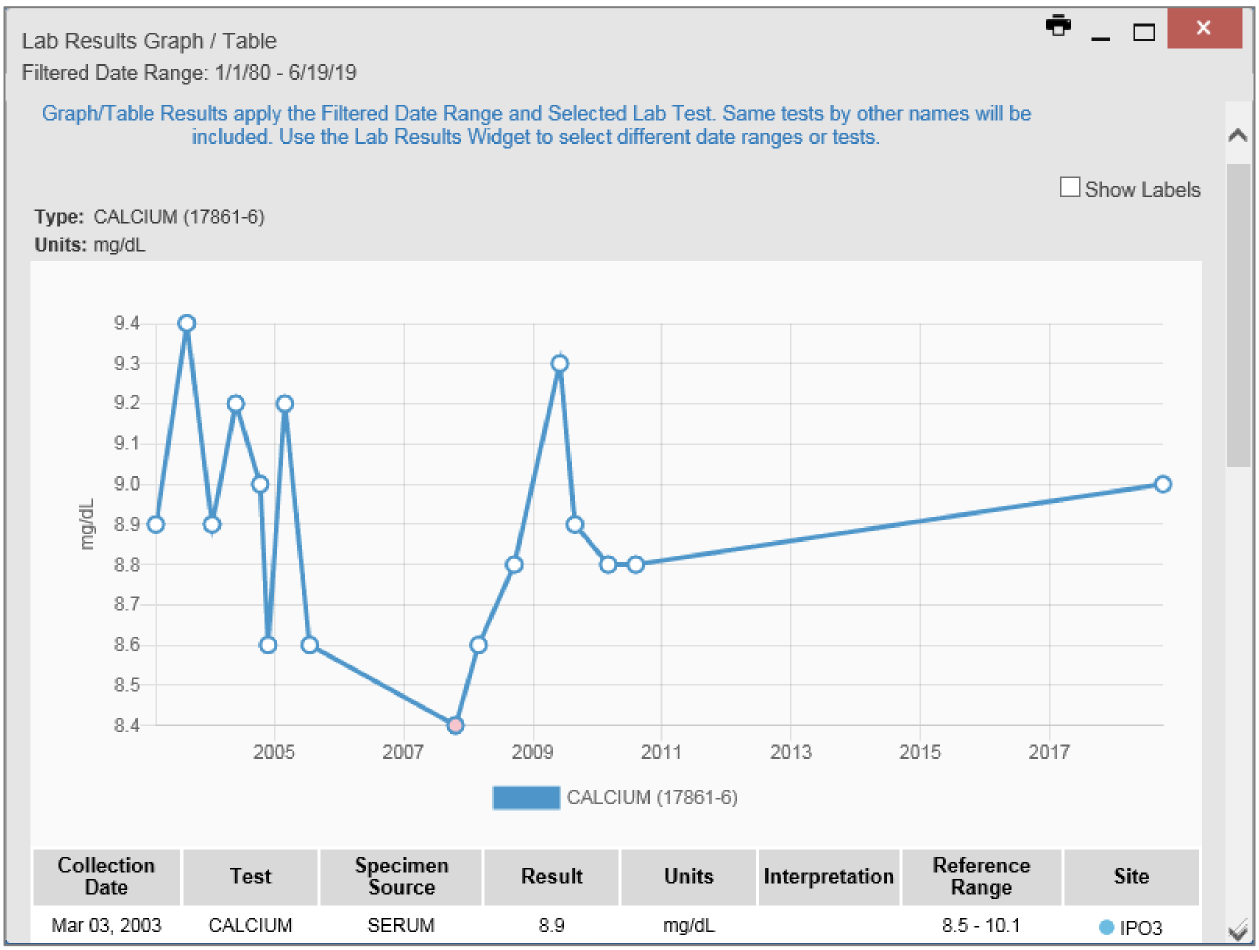
The **Lab Results** widget provides the option to display multiple results for the same lab test in a graph and table.

1. Select  from the widget toolbar in either minimized or expanded view **OR**

2. Click **More >>** from the minimized view of the **Lab Results** widget to open an expanded view of the widget, then select the **Show Graph/Table** link
3. Select a value from the **Select a Lab Test** dropdown in the **Lab Results Graph/Table** dialog
   a. The graph displays with corresponding table values beneath
4. Select the **Show Labels** checkbox to toggle graph data labels on or off
5. Select to exit **Graph/Table** view and return to the minimized or expanded view of the **Lab Results** widget

Figure 84 displays an example **Graph/Table** view of the lab test results.

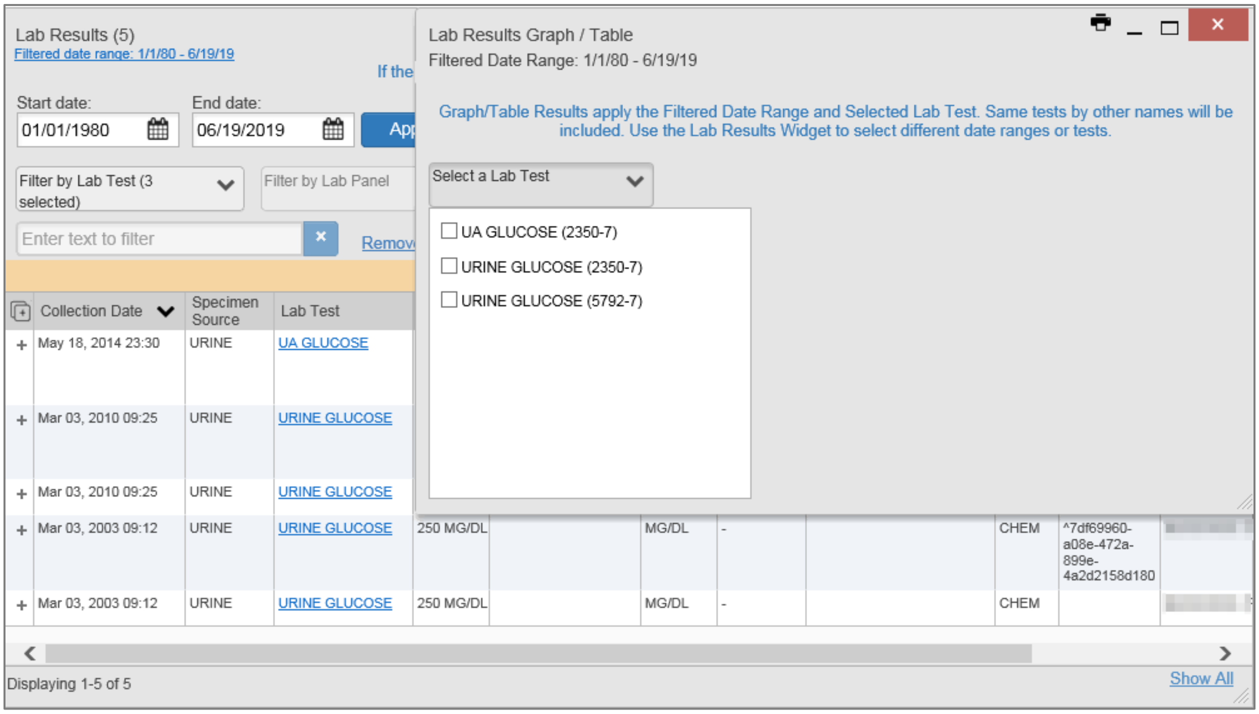
Figure 84: Lab Results Graph/Table View



In the expanded view of the **Lab Results** widget, selecting one or more values in the **Filter by Lab Test** dropdown will disable all other filter dropdowns until the filtered selections are removed. The lab test values in the **Filter by Lab Test** dropdown dynamically increase or decrease depending on the date filter criteria you apply. Tests with the same LOINC code (shown in parentheses following the lab test name) as the ones selected will be automatically included in the filtered results displayed in the widget.

You may only use the graph/table feature for a single lab test LOINC value. All lab tests with the same LOINC will be graphed even if the lab test names differ. While you can select multiple lab test values in the **Filter by Lab Test** dropdown, you will be forced to select a single lab test value from the **Select a Lab Test** dropdown in the **Lab Results Graph/Table** dialog (Figure 85) once you select either or the **Show Graph/Table** link. The lab test values in the **Select a Lab Test** dropdown also dynamically increase or decrease depending on the filter criteria applied in the **Lab Results Widget**.

Figure 85: Lab Results Graph Table View, Select a Lab Test



You may also generate a graph for all lab tests with the same LOINC code by selecting from the **Lab Results Details** view (Figure 79).

5.6. Federal EHR/Military Health System (MHS) GENESIS Widget

The **Federal EHR/MHS GENESIS** widget displays DoD patient documents and dental summaries from the DoD's MHS GENESIS system. The information is displayed in reverse chronological order by date.

> **NOTE:** The Federal EHR/MHS GENESIS widget is a DoD data source. You must enable DoD data sources to view data in this widget. If you opt to view only VA data sources, MHS GENESIS data is suppressed.

5.6.1. Federal EHR/MHS GENESIS Widget Data

The minimized view of the **Federal EHR/MHS GENESIS** widget includes the following information:

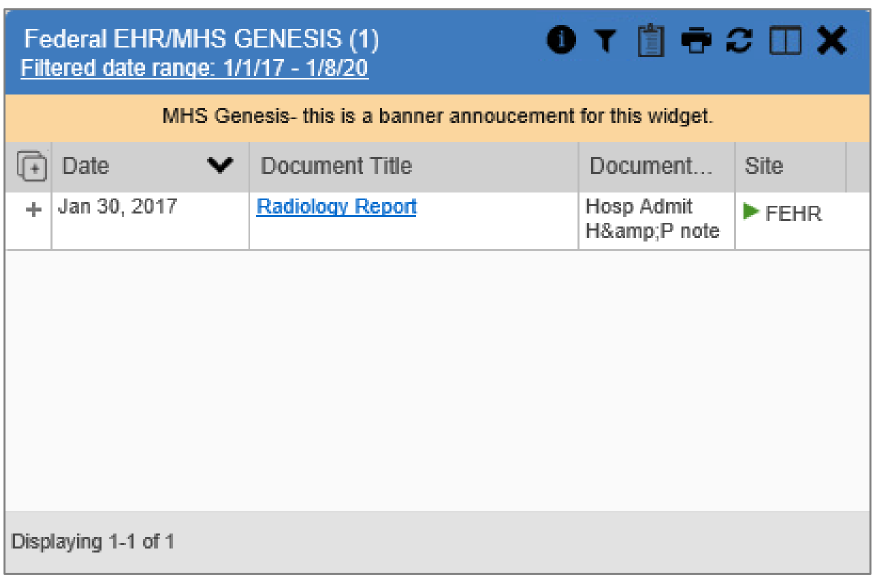
- Date
- Document Title
- Document Type
- Site

Figure 86 highlights the **Federal EHR/MHS GENESIS** widget in minimized view. There is no expanded view for the widget; instead, the C-CDA document selected opens in a new browser window (Figure 87).

> **NOTE:** The **Outpatient Medications** widget displays an orange banner with a warning that reads, *"Duplicate DoD meds may be present"* due to the integration of data from MHS GENESIS.

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

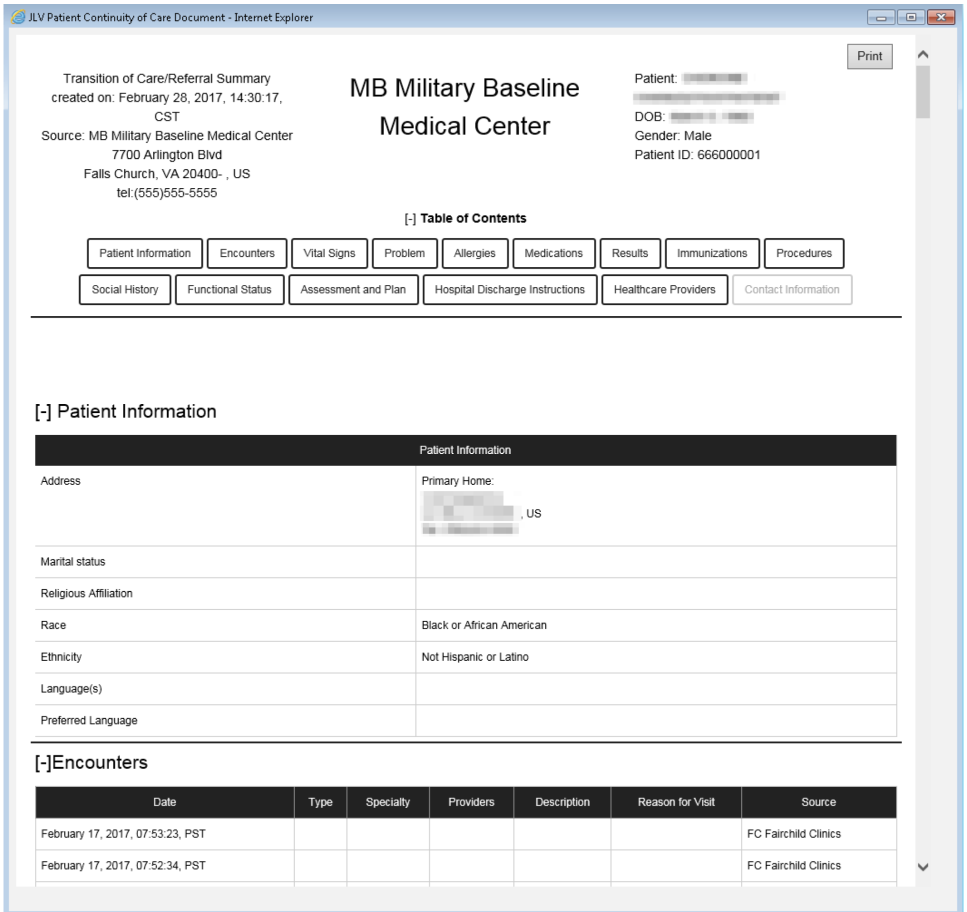
Figure 86: Federal EHR/MHS GENESIS Widget



5.6.2. Viewing Federal EHR/MHS GENESIS Documents

Click a hyperlink in the **Document** column in either view of the **Federal EHR/MHS GENESIS** widget to display a C-CDA document (Figure 87) in a new browser window.

Figure 87: CCDA Document



6. Troubleshooting

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

Please see online help for how-to information within JLV. Please visit JLV Resources to see JLV training videos and access additional JLV training materials.

6.1. Special Instructions for Error Correction

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

VHA users:

- Have accessed JLV using the JLV URL (https://jlv.med.va.gov/JLV) or the **JLV** button in CPRS if available
- Have entered their existing CPRS Access and Verify codes correctly in the fields on the JLV **Login** page

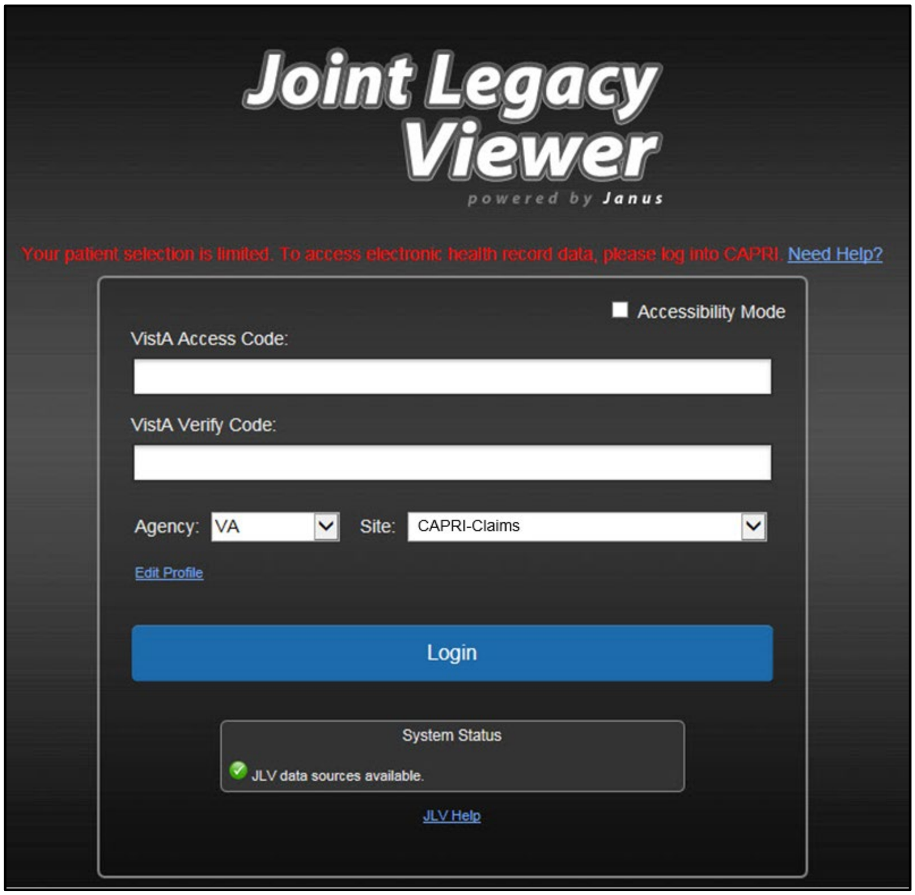
- Have selected a site from the **Site** dropdown list on the JLV **Login** page (Most users must specify the individual facility name or their parent healthcare system name)

CAPRI-Claims users:

- Have accessed JLV using the JLV URL(https://jlv.med.va.gov/JLV) or the **Joint Legacy Viewer** tab in CAPRI
- Have entered their existing CAPRI Access and Verify codes correctly in the fields on the JLV **Login** page
- Have selected CAPRI-Claims from the **Site** dropdown list
- Do not have any CAPRI patient selection restrictions

Users with any CAPRI patient selection restrictions (restricted users) must use the **Joint Legacy Viewer** tab in CAPRI to access JLV. Restricted users will see the message shown in Figure 88 on the JLV **Login** page if attempting to access JLV via the JLV URL.

Figure 88: Login Error - CAPRI Patient Selection Restrictions



6.1.1. Login Page Error Messages

Troubleshooting steps for error messages received at the **Login** page are provided in Table 8.

Table 8: Error Messages and Resolution Steps

Error Message/Behavior	Description/Resolution Steps
No access allowed for this user	***WHY?*** You have not signed onto CAPRI or CPRS for too long and your account is inactive. ***FIX IT:*** Contact the ESD and tell them that either your access to CAPRI or CPRS (whichever you use) has been deactivated.
Access denied. You are not an authorized user.	***WHY?*** There may be an issue with your Single Sign-on account. ***FIX IT:*** 1) Go to the Link My Account website 2) Select a certificate that is not expired, and specifies: *"Issuer: Veterans Affairs User CA B1"* 3) Select *Link VistA User* from the left side of the page 4) Select the VA Medical Center to link to 5) Enter your Access/Verify codes 6) Click **Submit** 7) If unsuccessful, contact the ESD
Could not save User Profile	***WHY?*** The error occurred during PIV authentication. It is either a PIV card processing problem, or you chose the wrong security certificate. ***FIX IT:*** 1) Close your browser window 2) Reinsert your PIV card and relaunch JLV *3)* Select a certificate that is not expired and specifies: *"Issuer: Veterans Affairs User CA B1"* 4) If unsuccessful, close all open IE windows/tabs, then open IE and try JLV again
Not a valid ACCESS/VERIFY CODE pair	***WHY?*** JLV could not match your Access and Verify codes to the site selected in the dropdown, or you entered username and password instead of Access/Verify codes. ***FIX IT:*** 1) VHA users must select the parent VistA host site for their facility 2) Reenter your Access and Verify codes (CAPRI codes for CAPRI-Claims users, CPRS codes for VHA users)
Page cannot be displayed	***WHY?*** The JLV URL requires certain IE settings. ***FIX IT:*** 1) Click the **Tools** menu (press ALT+X) in IE 2) Select **Internet Options** 3) When the dialog box opens, click the **Advanced** tab 4) Scroll down in the list until you see the Secure Sockets Layer (SSL) 2.0 setting, and ensure it is NOT checked 5) Ensure that the Transport Layer Security (TLS) 1.0, 1.1 and 1.2 settings ARE checked 6) Click **OK** to close the dialog box, then relaunch JLV (The page should load)

Error Message/Behavior	Description/Resolution Steps
Smart Card required	***WHY?*** Your Smart Card was not read by Windows Security and JLV before opening the JLV URL. ***FIX IT:*** 1) Close all browser sessions and browser-based applications 2) Reinsert your PIV card, and relaunch the JLV URL 3) If unsuccessful, close all open IE windows/tabs, then open IE and try JLV again
VERIFY CODE must be changed before continued use	***WHY?*** Your CPRS or CAPRI Verify code has expired. ***FIX IT:*** 1) Open CPRS, VistA, or CAPRI (CAPRI-Claims users) a) If prompted for a PIV card certificate by CPRS, click **Cancel** 2) You are prompted to create a new Verify code 3) Once your Verify code has been changed for CPRS or CAPRI, relaunch JLV, which recognizes the new code immediately
No message displays but behavior occurs**: Clicking the JLV button in CPRS does not open JLV**	***WHY?*** You are likely using Google Chrome as your default browser. ***FIX IT:*** 1) Click **Start** menu, then select **Default Programs** in the right pane 2) Click **Set your default programs** 3) Click **Internet Explorer** in the list, then click **Set this program as default**

6.1.2. System Error Messages

Table 9 summarizes system messages that may be presented to JLV users.

Table 9: System Error Messages

Error Message/Behavior	Description/Resolution Steps
No message displays but behavior occurs**: The browser window does not allow the user to scroll to widgets or access the JLV icons on the portal pages.**	***WHY?*** You may be using an unsupported browser, or your screen resolutions settings do not match the recommended configuration. ***FIX IT:*** 1) Access JLV using IE 11 2) Use a monitor with a minimum screen resolution of 1024 x 768 3) Set the browser zoom feature to 100% 4) If browser display issues continue, log out of JLV, close the browser window, open a new browser window, and log in to JLV again
Warning: An error occurred while attempting to retrieve VistA Imaging Viewer URL.	***WHY?*** JLV is unable to retrieve the necessary data object to launch a VistA Imaging Viewer instance. ***FIX IT:*** Try again later; either VDS or CVIX is offline.
MVI Error: Your query yields too many results. Please modify your search parameters to narrow the search.	***WHY?*** JLV adheres to VA guidelines and blocks search results when a search request yields more than 10 patients. ***FIX IT:*** Modify the information in the **Patient Search** dialog box using additional patient identifiers to reduce the number of results.

Error Message/Behavior	Description/Resolution Steps
MVI Error: There are no patients found using the current parameters.	***WHY?*** No patient records were found using the information entered in the **Patient Search** dialog box. ***FIX IT:*** 1) Verify the accuracy of the information 2) Reenter patient identifiers in the **Patient Search** dialog box fields
MVI Error: Application Reject. There was an error attempting to process your query. Please modify your search parameters and try again.	***WHY?*** There may be one or more errors in the **Patient Search** dialog fields. ***FIX IT:*** 1) Validate the patient identifiers, and try the search again 2) If problems persist, there may be an error between MVI and the Defense Enrollment Eligibility Reporting System (DEERS)
MVI Error: Patient not found with search elements entered, please provide additional patient identifying information and search again.	***WHY?*** No unique patient is found with the identifiers used in the search. ***FIX IT:*** 1) Click **OK** to return to the **Patient Search** dialog 2) Provide additional patient identifiers, like the full first name or DOB
You do not have authorization to view this record. Security regulations prohibit computer access to your own medical record.	***WHY?*** VA security regulations prevent you from accessing your own medical records.
You do not have authorization to view this record. Your SSN is missing from the NEW PERSON file. Contact your ADP Coordinator.	***WHY?*** Per VA policy, JLV does not allow access to patient records if the JLV user's SSN is not in their VistA profile. ***FIX IT:*** Contact your Automated Data Processing Application Coordinator (ADPAC).
An error occurred while attempting to retrieve the document.	***WHY?*** This error occurs when something goes wrong when JLV tries to retrieve a selected document. ***FIX IT:*** 1) Try again 2) If the error persists, contact local support or the ESD
An error occurred while attempting to display the document.	***WHY?*** This error occurs when JLV tries to retrieve a document but has trouble converting the document to a viewable format. ***FIX IT:*** 1) Try again 2) If the error persists, contact local support or the ESD
Your patient selection is limited. To access electronic health record data, please log in to CAPRI.	***WHY?*** Some CAPRI-Claims users have patient or site restrictions attached to their profile. ***FIX IT:*** Log in to CAPRI and select the **Joint Legacy Viewer** tab to view patient records.

A. Acronyms and Abbreviations

Table 10 lists the acronyms and abbreviations used throughout this document and their descriptions.

Table 10: Acronyms and Abbreviations

Acronym	Description
ADPAC	Automated Data Processing Application Coordinator
AFB	Air Force Base
AHLTA	Armed Forces Health Longitudinal Technology Application
AMC	Army Medical Center
CAPRI	Compensation and Pension Record Interchange
CCD	Continuity of Care Document
CCDA	Consolidated Clinical Document Architecture
CCOW	Clinical Context Object Workgroup
CD2	Critical Decision Point #2
CDC	Centers for Disease Control
CDR	Clinical Data Repository
CHCS	Composite Health Care System
CPRS	Computerized Patient Record System
CPT	Current Procedural Terminology
CVX	Vaccine Administered
DEERS	Defense Enrollment Eligibility Reporting System
DOB	Date of Birth
DoD	Department of Defense
EDIPI	Electronic Data Interchange Personal Identifier
EHR	Electronic Health Record
EHRM	Electronic Health Record Modernization
ESD	Enterprise Service Desk
FEHR	Federal Electronic Health Record
GUI	Graphical User Interface
HAIMS	Healthcare Artifact and Image Management Solution
HCP	Health Care Provider
HCS	Health Care System
HIE	Health Information Exchange
HL7	Health Level Seven International
ID	Identification
IE	Internet Explorer
IEN	Internal Entry Number
IP	Internet Protocol
JB	Joint Base

Acronym	Description
JLV	Joint Legacy Viewer
LOINC	Logical Observation Identifiers Names and Codes
MAH	Medication Administration History
MAL	Medication Administration Log
MHS	Military Health System
MI	Middle Initial
MVI	Master Veteran Index
NUCC	National Uniform Claim Committee
OIT	Office of Information and Technology
PCM	Primary Care Management
PCMM	Primary Care Management Module
PDWS	Patient Discovery Web Service
PIN	Personal Identification Number
PIV	Personal Identity Verification
SSL	Secure Sockets Layer
SSN	Social Security Number
SSOi	Single Sign-On Internal
TLS	Transport Layer Security
TMDS	Theater Medical Data Store
UC	University of California
UI	User Interface
URL	Uniform Resource Locator
VA	Department of Veterans Affairs
VBA	Veterans Benefits Administration
VDS	VistA Data Service
VHIE	Veterans Health Information Exchange
VIP	Veteran-Focused Integrated Process
VLER	Virtual Lifetime Electronic Record
VHA	Veterans Health Administration
VistA	Veterans Health Information Systems and Technology Architecture

B. Patient Portal Widgets, Columns, and Supported Views

Table 11 details each data column within the minimized and expanded views of each widget. Data columns available in each view are ordered from left to right.

- An asterisk (*) next to a column title in the table indicates the data for that record is available in "detail view" from within the widget; clicking a link opens the contents of that record in a standalone window
- A dagger (†) next to a column title in the table indicates the data in that column is normalized (mapped to standards)
- A double dagger (‡) next to a column title in the table indicates the column is hidden by default and must be added from

Table 11: Widget Details

Widget	Description	Minimized View	Expanded View
Admissions	Displays the patient's inpatient admissions information including VA expanded admission discharge transfer history and detailed discharge diagnosis data	Adm Date* | Discharge Date | Diagnosis† | Ward | Site	Adm Date* | Discharge Date | Ward | Provider† | Diagnosis† | Standardized Diagnosis† | Registration Number | Site
Allergies	Displays the patient's allergy information	Date Recorded | Allergen*† | Site	Date Recorded | Allergen*† | Standardized Allergen† | Reaction | Severity |Comments | Site
Appointments	Displays the patient's past and future appointments information	Scheduled Date/Time* | Clinic | Provider†[19] | Site	Scheduled Date/Time* | Clinic | Provider†[19] | Provider Specialty†[19]| Appointment Status | Type | Reason | Site
Cardiology Studies - VA MUSE Only	Displays EKGs and cardiology studies with related images from all VA MUSE sites and systems	Date | Description (Test Type) | Status | Image	N/A
Clinical Reminders - VA Only	Displays the patient's clinical reminders information from all VA sites	Reminder | Site*[20]	Reminder | Site*[20]

[19] Column hover display includes provider address and phone number.
[20] Lists a sortable, filterable reminder column for each site to which the patient is registered. A maximum of three site columns display in minimized view. All site columns display in expanded view.

Widget	Description	Minimized View	Expanded View
Community Health Summaries	Displays the patient's community health documents from VHIE partners including any CCDs, in C32 and C62 formats, and HL7 C-CDA structured documents	Date | Document* | Source	N/A
Consult Encounters	Displays the patient's outpatient consult information	Date | Consult Order* | Status | Site	Date | Consult Order* | Provider† | Provider Specialty† | Status | Site
Demographics	Displays the patient's non-clinical or personal data including Patient Inquiry, Demographics, Insurance, Disabilities, and Primary Care assignments	The tabs above the patient's name provide a summary at site (VA or DoD) where the patient is registered	Click the patient name to open a separate window that provides patient demographic details (VistA patient inquiry for each VA site and DoD DEERS)
Documents	Displays documents from multiple clinical domains including radiology reports (exams), progress notes, outpatient encounters, consult encounters, discharge summaries, inpatient notes, questionnaires, and HAIMS and MHS GENESIS records	Date (Note[s]*) | Description*† | Provider† | Image | Site	Date (Note[s]*) | Description*† | Standardized Description† | Provider† | Provider Specialty† | Location | Status | Image | Source System | Site
Federal EHR/MHS GENESIS	Displays patient documents and dental summaries from the MHS GENESIS system	Date | Document Title* | Document Type | Site	N/A
Health Summaries and Reports - VA Only	Displays the patient's national and local health summaries and reports from VA sites where the patient has been registered	Description* | Site	Description* | Type | Site
Immunizations	Displays the patient's immunization history, including skin test data (where available) in the patient's record	Vaccine Administered Date (Note[s]*) | Vaccine Administered Product Type*† | Adverse Vaccine Reaction | Site (Reporting)	Vaccine Administered Date (Note[s]*) | Vaccine Administered Product Type*† | Standardized Vaccine Product Type† | Series | Immunization Result | Adverse Vaccine Reaction | Exemption/Refusal Reason | Exemption/Refusal Date | Site of Admin | Site (Reporting)[21]
Inpatient Medications	Displays a patient's inpatient medications information including inpatient infusions	Order Number | Drug Name*† | Status | Order Stop Date | Site	Order Number | Order Start Date | Order Stop Date | Drug Name*† | Standardized Drug Name† | Status | Ordering HCP† | Ordering HCP Specialty† | Schedule | MAH/MAL | Quantity | Site

[21] The **Immunizations** widget differentiates between the reporting site and the site of administration of a vaccine.

Widget	Description	Minimized View	Expanded View
Inpatient Summaries	Displays the patient's discharge summaries, history, and physical summaries	Date | Note Type/Title* | Site	Date | Note Type/Title* | Provider† | Provider Specialty†[22] | Location | Visit/Adm Date | Status | Site
Lab Results	Displays the patient's lab results information by individual lab test for all test types (i.e., Microbiology, Cytopathology, and Surgical Pathology) as well as skin test data and blood bank (blood type testing and transfusion) history, when available in the patient's record	Collection Date | Lab Test*† | Result* | Lab Panel* | Site	Collection Date | Specimen Source | Lab Test*† | Standardized Lab Test†‡ | Result* | Interpretation* | Units | Ref Range | Lab Panel* | Type | Order Number | Ordering HCP† | Ordering HCP Specialty†‡ | Status | Site
Orders	Displays the patient's medication, consult, radiology, and lab orders	Order Date | Description*† | Status/Priority | Type | Site	Order Date | Order Number | Description*† | Status/Priority | Start Date | Stop Date | Type | Standardized Type† | Provider† | Provider Specialty† | Site
Outpatient Encounters	Displays records of the patient's outpatient encounters	Encounter Date (Details* | Note*) | Clinic | Provider† | Diagnosis† | Image | Site	Encounter Date (Details* | Note*) | Clinic | Status[23] | Type | Provider† | Provider Specialty† | Reason | Diagnosis† | Standardized Diagnosis† | Image | Site
Outpatient Medications	Displays the patient's outpatient medications information, including those discontinued or expired within the past 120 days	Last Fill | Drug Name*† | Status | Expires | Site	Last Fill | Drug Name*† | Standardized Drug Name† | Prescription Number | Sig | Quantity | Days' Supply | Refills Left* | Status | Ordering HCP† | Ordering HCP Specialty† | Expires | Site
Problem List	Displays the patient's problem list information	Updated Date | Problem Description*† | ICD | Type | Status | Linked Items[24] | Site	Updated Date | Onset | Problem Description*† | Standardized Description† | ICD | Severity | Type | Status | Linked Items[24] | Site

[22] The **Provider Specialty** column is populated with VA data only.
[23] Data in the **Status** column is populated with DoD data only.
[24] **Linked Item**s contains DoD data only

Widget	Description	Minimized View	Expanded View
Procedures	Displays the patient's procedures for all Current Procedural Terminology (CPT) codes	Procedure Date (Medicine Full Reports* | Note[s]*) | Location[25] | Provider† | Procedure Description† | Image | Site[26]	Procedure Date (Medicine Full Reports* | Note[s])* | Location[25] | Provider† | Provider Specialty† | CPT Code[27] | Procedure Description† | Standardized Procedure Description† | Image | Type | Site[26]
Progress Notes	Displays the patient's progress notes information as well as advance directives, clinical warnings, and crisis notes	Date | Document Type/Title*† | Provider† | Image | Site	Date | Document Type/Title*† | Standardized Document Type† | Provider† | Provider Specialty† | Clinic | Image | Site
Questionnaires and Deployment Assessments (AHLTA Only)	Displays the patient's history of questionnaires and DoD pre- and post-deployment assessments	Date | Document Title*†| Site	Date | Entered By | Document Title*†| Standardized Document Title† | Site
Radiology Reports	Displays the patient's radiology exams information	Date | Exam*†| Image | Site	Date | Exam Number | Exam*†| Standardized Radiology Exam† | CPT Description† | Status | Results | Image | Site
Social, Family, and Other Past Histories	Displays the patient's history records from DoD only	Date Reported | Type | Findings | Status | Site	Date Reported | Type | Findings | Standardized Findings | Comments | Status | Site
Surgery/Procedure Reports - VA Only	Displays surgical and operative reports for all dates	Date | Note Title | Provider | Site	Date | Note Title | Procedure | Provider | Image | Site
Vitals	Displays the patient's vital signs information from inpatient or outpatient settings	Date Taken | Type*† | Result | Units | Site	Date Taken | Type*† | Standardized Type† | Result | Units | Site

[25] **Location** represents a ward or clinic within a given DoD or VA facility where the procedure took place.
[26] **Site** represents the source of procedure (i.e., VA or DoD). **Site** is different from **Location** or **Facility**.
[27] Limited to clinically relevant medical or administrative procedure types