



My HealtheVet: Secure Messaging (SM) Administrator User Manual

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Introduction

What is My HealtheVet?

My HealtheVet is the gateway to Veteran health benefits and services. It provides access to trusted health information, links to Federal and Department of Veterans Affairs (VA) benefits and resources, the Personal Health Journal, online VA prescription refill, Blue Button downloads, and Secure Messaging. My HealtheVet is a powerful tool to help Veterans better understand and manage their health.

The Organization of this Manual

This manual is organized in the way most Secure Messaging Administrators will use the My HealtheVet Secure Messaging (SM) Administrative Portal. It begins with how to log into the My HealtheVet Administrative Portal and Secure Messaging (SM) Administrative Portal and then how to perform the various administrative functions.

We hope this organization will help Secure Messaging Administrators understand the basic layout of My HealtheVet Secure Messaging (SM) Administrative Portal and provide them with information about the specific functions they will perform.

Getting Started with My HealtheVet Secure Messaging (SM) Administrative Portal

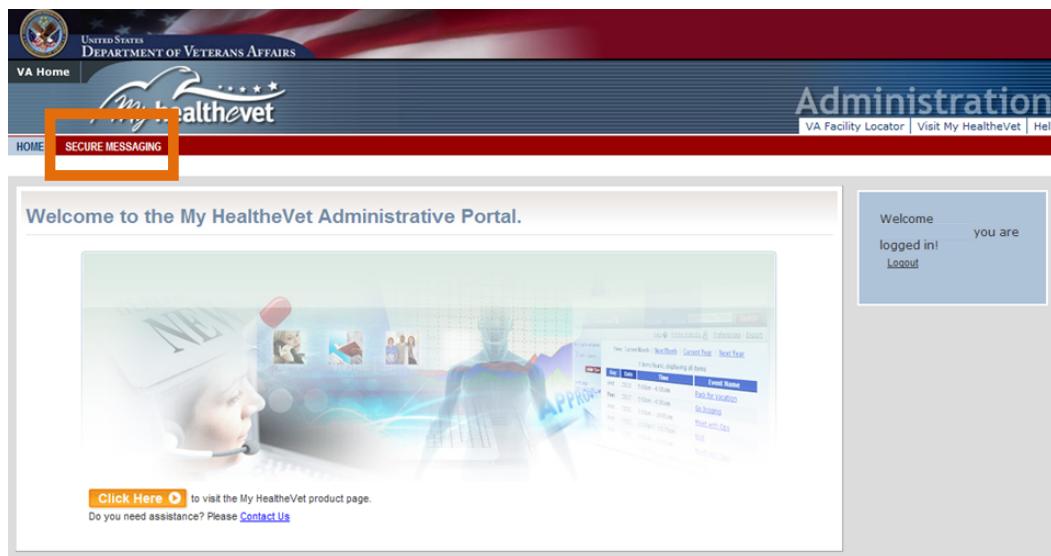
To participate in My HealtheVet Secure Messaging, health care team members must have an active account within Secure Messaging. This occurs when the Secure Messaging Administrator activates the health care team member's account within the My HealtheVet Secure Messaging (SM) Administrative Portal.

After the staff member's account has been activated, the Secure Messaging Administrator is able to create a Triage Group, assign staff member(s) to the group, and associate patients with the group. Administrators can then associate the Triage Group with a National Secure Messaging Workload Clinic and Secure Messaging Progress Note Title.

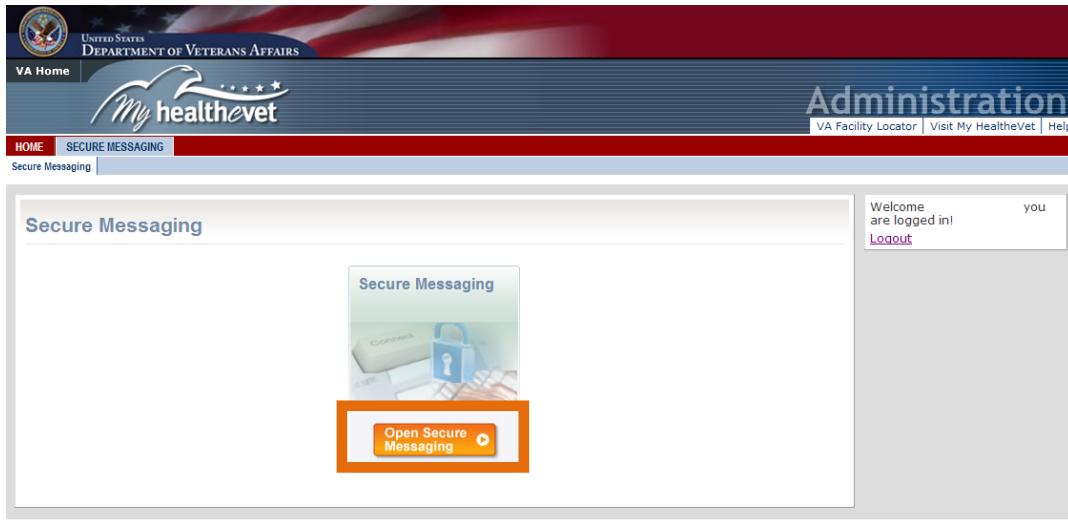
Secure Messaging Administrators will use the SM Administrative Portal to manage user configuration (status, information, surrogates) and block a patient's access if needed. Administrators will have the ability to monitor staff's messages. The SM Administrative Portal allows Administrators to run various types of reports. *****Please note...** Additional reports are available through the VHA Support Service Center (VSSC) located at <http://vssc.med.va.gov/products.asp?PgmArea=17>.

Log into My HealtheVet Secure Messaging (SM) Administrative Portal

Staff members assigned the role of Secure Messaging Administrator can access the My HealtheVet SM Administrative Portal by going to <https://admin.myhealth.va.gov>, logging in using their VA Network User ID and Password, and selecting the red **SECURE MESSAGING** tab.



Then click the orange **Open Secure Messaging** button in the middle of the screen.



Administrative Functions Home

The Secure Messaging (SM) Administrative Portal opens to the Administrative Functions Home page. All the major functions are displayed in the middle of the screen. ***Please note... all functions can be accessed from the Administrative Functions page or by using the links in the menu on the left side of the screen.

A screenshot of the administrative functions home page. At the top, it shows the "My HealtheVet" logo and a "Secure Messaging" title. On the right, there are links for "Close Secure Messaging", "Help", "Technical Support", and "Preferences". A message "You are logged in as: Brian Miller" is also present. The main content area is titled "Administrative Functions" and contains several boxes: "Manage Triage Groups" (with links to "Create a New Triage Group" and "Edit a Triage Group"), "System Reports" (with links to "Show Counts/Trends", "Show Lists", "Search By Patient", and "Search By Staff"), "Manage Staff Members" (with a link to "Activate, Inactivate or reactivate staff members"), and "User Configuration" (with links to "User Participation Status", "Change User Information", "Manage User Surrogates", "Block a Patient's Access", and "Add Patients to Facility"). On the far left, there is a vertical navigation menu with sections like "Administrative Functions", "Triage Groups", "System Administration", "User Configuration", and "System Reports", each containing various sub-links.

The Secure Messaging Administrator has four main functions that they are able to perform in the SM Administrative Portal:

1. Manage Staff Members – activate/inactivate/reactive staff member accounts;
2. Manage Triage Groups – create or modify a Triage Group, associate SM Clinic to Triage Group;
3. System Reports – run reports; and
4. User Configuration – manage user status / information / surrogates, and block a patient's access (if necessary).

Manage Staff Members

Health care team members must have an active account within Secure Messaging. Secure Messaging Administrators will use Manage Staff Members to activate the health care team member's account.

From the Administrative Functions Home page, click the [Activate, deactivate, or reactivate staff members](#) link located under Manage Staff Members (see orange box below).

The screenshot shows the 'Administrative Functions' page of the My HealthVet system. The left sidebar has a navigation menu with several options: 'Functions Home', 'Triage Groups' (with 'Create a Triage Group' and 'Edit a Triage Group'), 'System Administration' (with 'Manage Staff Members', 'View Staff Messages', 'Manage Triage Group for SM Clinic'), 'User Configuration' (with 'User Participation Status', 'Change User Information', 'Manage User Surrogates', 'Block a Patient's Access', 'Add Patients to Facility'), and 'System Reports' (with 'Select a Report'). The 'Manage Staff Members' option is highlighted and has an orange box around it. In the main content area, there are three boxes: 'Manage Triage Groups' (with 'Create or Modify a group of Clinicians and Staff to function as a Triage Group' and 'Create a New Triage Group'), 'System Reports' (with 'Show Counts/Trends', 'Show Lists', 'Search By Patient', 'Search By Staff'), and 'Manage Staff Members' (with 'Activate, deactivate, or reactivate staff members'). The 'Activate, deactivate, or reactivate staff members' link is also highlighted with an orange box.

The system provides the following options:

- Activate a Staff Member – to activate a staff member who is not currently using Secure Messaging;
- Inactivate a Staff Member – to deactivate an account of a staff member who might be using Secure Messaging inappropriately or who is no longer A VA employee or no longer required to use Secure Messaging; and
- Reactivate a Staff Member – to reactivate the staff member's account after they have agreed to use Secure Messaging appropriately or to reactivate an account for a staff member who has changed their name (after you have made changes to their user information within the system).

Click the **Activate a Staff Member** button.

Manage Staff Members

Activate a Staff Member

Inactivate a Staff Member

Reactivate a Staff Member

Cancel

There are two options for user entry:

1. Single User Entry – to search and activate one staff member at a time; and
2. Bulk Activation from CSV File – to activate a large group of staff members at one time.

Single User Entry

To activate a single user, click the **Single User Entry** button.

Manage Staff Members

Select an Entry Method

Select "Single User Entry" or "Bulk Activation from CSV File" to search and activate SM staff members to user table.

Single User Entry

Bulk Activation from CSV File

Cancel

Manage Staff Members

Search for Secure Messaging Staff Member

Search on a specific SM staff member by "Search by Name" or "Search by DUZ". The more information you provide the more restricted your results will be.

Step1: Select a VISN

Step2: Select a Facility

Step3: Search by Name or DUZ

Search by Name

First Name:

Last Name:

Search by DUZ

DUZ:

Step 1 – select a VISN from the drop-down list and click the **Select** button.

***Please note... you must click the **Select** button before moving on to Step 2.

Step 2 – select a Facility from the drop-down list and click the **Select** button.

***Please note... you must click the **Select** button before moving on to Step 3.

Step 3 – search for the staff member either by Name or DUZ (unique identifier in VistA):

- Click the radio button next to the Search by Name option and then enter First/Last Name, or
- Click the radio button next to the Search by DUZ option and then enter the staff member's DUZ number.

Once all the search criteria for the staff member has been entered, select the **Search** button at the bottom of the screen.

The system generates a Query Results table containing the staff member's information (name, phone number, title). (If the staff member is not displayed, click the **New Search** button and reenter the search criteria.)

Click the staff member's name (link) under the **Name** column.

Manage Staff Members

Query Results

The following SM staff members match your search criteria. Click the member's name to view their details or associate a network ID.

1 Items found, displaying all items.

Name	Phone Number	Title
SMOKECLINICIAN_MHVSM	555-123-4567	Registered Nurse

1 Items found, displaying all items.

[New Search](#)

The system will bring up the staff member's information. Make sure the correct information is displayed for the staff member who is being activated. (If the wrong staff member was selected, use the **New Search** button at the bottom of the screen to begin the process again.)

The system requires a Network ID as part of the activation process. The Network ID is the same VA Network ID used to login to the VA computer. ***Please note... the Network ID can be found in Outlook's Global Address Listing – search for the staff member, select the staff member's name, and the VA Network ID is located in the Alias field.

Enter the staff member's Network ID and then click the **Submit** button.

Manage Staff Members

Associate a Network ID

You have chosen to associate the network ID for this SM staff member. If you would like to find your match results, click the "submit" button.

First Name: MHVSM
Last Name: SMOKECLINICIAN
Title: Registered Nurse
Phone: 555-123-4567
Network ID:

[Submit](#)

[New Search](#)

[Cancel](#)

The system then requests verification that the VistA and Active Directory results match. (If the information does not match, click the **New Search** or **Cancel** button and restart the process.) Click the **Verify** button.

Manage Staff Members

Verify VistA and Active Directory Results Match

You are viewing VistA results and active directory results. If you would like to verify, click the "Verify" button.

VistA Results	Active Directory Results
First Name: MHVSM Last Name: SMOKECLINICIAN Network ID: aaaaa Title: Registered Nurse Phone Number: 555-123-4567	First Name: MHVSM Last Name: SMOKECLINICIAN Network ID: aaaaa Title: Registered Nurse Phone Number: 555-123-4567

Verify **New Search** **Cancel**

The final step in activating a staff member is to assign the staff member a User Type – a User Type is the “role” the staff member will assume within Secure Messaging.

Provider: MDs, DOs, PAs, and NPs.

Clinical Team Member: All other healthcare/clinical staff (e.g. RN, LPN, social worker, dietician, psychologist, pharmacist, etc.)

Triage: All clerical/administrative staff

Select a **User Type** from the drop-down list.

SM Staff Member Maintenance

Assign SM Staff Member Type

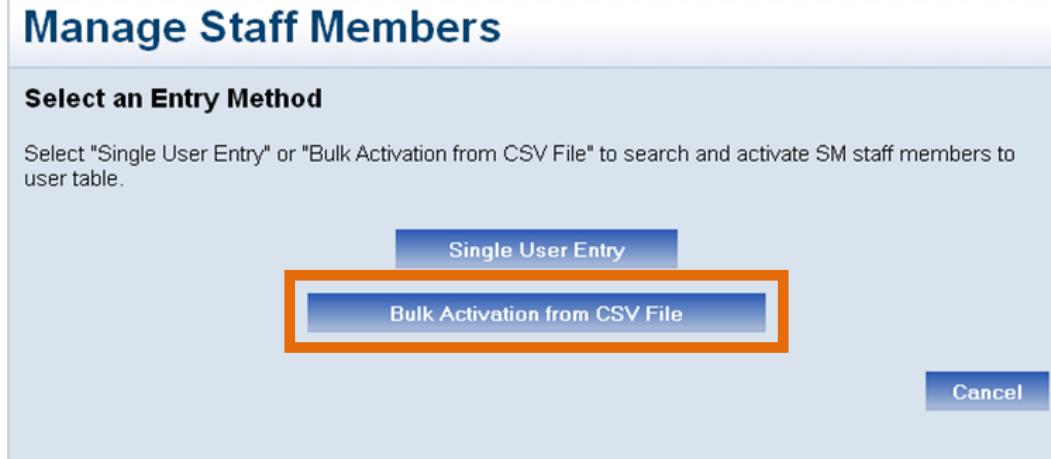
Select user type to activate this SM staff member.

First Name: MHVSM Last Name: SMOKECLINICIAN Network ID: aaaaa DUZ:	User Type: <input type="button" value="-- Select a Type --"/> -- Select a Type -- Provider Clinical Team Member Triage Staff	Activate Staff Member	New Search
---	---	------------------------------	-------------------

Once the User Type has been selected for the staff member, click the **Activate Staff Member** button to complete the activation process. ***Please note... activating a staff member's account will automatically opt them into using Secure Messaging – there is no extra step for opting in.

Bulk Activation from CSV File

To activate a group of health care team members at one time, click the **Bulk Activation from CSV File** button.



Before you can bulk activate staff members, you will need to create an Excel spreadsheet containing the following information for each staff member:

- Column A – “C” (all entries must contain this code)
- Column B – First Name of the staff members
- Column C – Last Name of the staff members
- Column D – DUZ for each staff member (DUZ is the unique identifier in VistA; internal entry number obtained from ADPAC service)
- Column E – Facility Code
- Column F – Network ID for each staff member (found in Outlook’s Global Address Listing – search for staff member’s name, and the Network ID is located in the Alias field)
- Column G – User Type ID for each staff member (1 for Provider, 2 for Clinical Team Member, 3 for Triage Staff)

***Please note... you must save the Excel spreadsheet as a .CSV file.

After the CSV file has been created and saved, click the **Browse** button, locate and select the file, and then click the **Open** button. Then click the **Add Staff Members** button.

SM Staff Member Maintenance

Bulk Addition of New Staff Members

Browse and upload a bulk addition file to secure messaging staff members.

 [Browse...](#)[Add Staff Members](#)[Cancel](#)

The system will bulk activate all staff members that are listed in the CSV file.

The system will indicate the staff members have been activated. Click the **Done** button.

SM Staff Member Maintenance

Bulk Addition of New Staff Members

Secure Messaging staff members have been activated.

[Done](#)

Manage Triage Groups

After the staff member's account has been activated, the Secure Messaging Administrator will create a Triage Group, assign staff member(s) to the group, and associate patients with the group. Administrators will also associate the Triage Group with the Secure Messaging Workload Clinic and Secure Messaging Progress Note Title, providing the ability to capture workload credit.

Create a New Triage Group

From the Administrative Functions Home page, click the [Create a New Triage Group](#) link located under Manage Triage Groups (see orange box below).



The screenshot shows the 'Administrative Functions' page. On the left, a sidebar lists categories: Functions Home, Triage Groups (which is selected and highlighted in blue), System Administration, User Configuration, and System Reports. The main content area is titled 'Administrative Functions' and contains three boxes: 'Manage Triage Groups' (with sub-links: Create or Modify a group of Clinicians and Staff to function as a Triage Group, Create a New Triage Group, View or Modify an Existing Triage Group, Associate SM Clinic to Triage Group), 'System Reports' (with sub-links: Show Counts/Trends, Show Lists, Search By Patient, Search By Staff), and 'User Configuration' (with sub-links: User Participation Status, Change User Information, Manage User Surrogates, Block a Patient's Access, Add Patients to Facility). The 'Create a New Triage Group' link in the 'Manage Triage Groups' box is highlighted with a red rectangle.

Step 1 – Enter a Triage Group name and click the **Save Name and Select Group Members** button.

Create a New Triage Group

Enter a Triage Group Name

Step 1 --- Step 2 --- Step 3

Triage Group Name:

Example: Provider Last Name, First Initial, Middle Initial - Site Location

Save Name and Select Group Members

Cancel

Step 2 – First select a VISN from the drop-down list and click the **Select** button.

Create a New Triage Group

Select Triage Group Members

[Step 1](#) --- **Step 2** --- Step 3

Triage Group Name:

TEST Secure Messaging Team

Select Triage Group Staff:

Select a Facility:

Selecting a Facility will help to narrow the list of VA staff who can be selected as Triage Group members. Begin by selecting a VISN.

VISN:

Select

Cancel

Continuing with Step 2 – Select the Facility from the drop-down list and click the **Select** button.

Create a New Triage Group

Select Triage Group Members

[Step 1](#) --- **Step 2** --- Step 3

Triage Group Name:

TEST Secure Messaging Team

Select Triage Group Staff:

Selected Facility:

Selecting a Facility will help to narrow the list of VA staff who can be selected as Triage Group members.

VISN: VISN 4

Facility:

Select

Cancel

Continuing with Step 2 – Select the providers and staff to add to the Triage Group. A list of providers and staff members who have active Secure Messaging accounts will appear on the left side of the screen. Search and select the staff

members' names (*multiple names may be selected by pressing the 'Ctrl' key when clicking). After selecting the names, click the **Add->** button.

Create a New Triage Group

Select Triage Group Members

Step 1 Step 2 Step 3

Triage Group Name:
TEST Secure Messaging Team

Select Triage Group Staff:

Selected Facility:
VISN: VISN 4
Facility: PITTSBURGH (UD), PA VAMC

Select Providers and Staff to Add:

MHVPERFSMDOCTOR, ALFRED ONE
MHVPERFSMDOCTOR, BERNICE TWO
MHVPERFSMDOCTOR, CHARLES THREE
MHVPERFSMDOCTOR, DONNA FOUR
MHVPERFSMDOCTOR, EDGAR FIVE
MHVPERFSMDOCTOR, FIONA SIX
MHVPERFSMDOCTOR, GARY SEVEN
MHVPERFSMDOCTOR, HARRIET EIGHT
MHVPERFSMDOCTOR, IKE NINE
MHVPERFSMDOCTOR, JANICE TEN

Note: Multiple items may be selected by pressing the 'Ctrl' key when clicking

Group Members:

Add -> (button highlighted with orange box)
<- Remove

Save Group and Define Relationships **Cancel**



The staff members' names will move from the left side of the screen to the right side under the Group Members column. Once all providers/staff members for the Triage Group have been added as Group Members, click the **Save Group and Define Relationships** button. If a staff member is added to the Group Members column by mistake, select that staff member's name and click the **<-Remove** button.

Step 3 – Defines the Patient/Triage Group Relationships, which sets up the permissions for a specific group of patients to message the specific Triage Group. There are 4 options for setting up these relationships:

- **PCMM (Primary Care Management Module) Primary Care** – Sets up a relationship allowing patients with the selected PCMM Primary Provider to message this Triage Group;
- **Clinics** – Sets up a relationship allowing patients who have had an appointment within the last 365 days with a specified clinic or have an upcoming appointment within 365 days after today's date with a specified clinic to message this Triage Group;
- **OE/RR Teams** – Sets up a relationship allowing patients who are members of the selected OE/RR Teams to message this Triage Group;
- **Patients** – Sets up a relationship allowing individual patients who are manually selected to message this Triage Group.

Determine which type of relationship you want to associate the patients with and click the **Define Relationship** button within that row.

Create a New Triage Group

Define Relationships

Step 1 Step 2 Step 3

Triage Group Name:

TEST Secure Messaging Team

Triage Group Staff:

Selected Facility:

VISN: VISN 4

Facility: PITTSBURGH (UD), PA VAMC

Group Members:

MHVPERFSMDOCTOR, BERNICE TWO
MHVPERFSMDOCTOR, CHARLES THREE
MHVPERFSMDOCTOR, IKE NINE

Define Patient / Triage Group Relationships

Define the patient groups who have a relationship with this Triage Group

PCMM Primary Providers

Patients with the following PCMM Primary Providers:

Define Relationship

Clinics

Patients with appointments scheduled between 365 days before and 365 days after today's date, at the following Clinics:

Define Relationship

OE/RR Teams

Patients who are members of the following OE/RR Teams:

Define Relationship

Patients

Add Patients manually:

Define Relationship

Save Group **Cancel**

PCMM Primary Provider – First search for the PCMM Primary Provider by entering their First or Last Name and then click the **Search** button.

Create a New Triage Group

Define Relationships

[Step 1](#) [Step 2](#) **Step 3**

Triage Group Name:

TEST Secure Messaging Team

Define Patient / Triage Group Relationships

Define the patient groups who have a relationship with this Triage Group

Selected Facility:

VISN: VISN 4

Facility: PITTSBURGH (UD), PA VAMC

Search for PCMM Primary Providers

* Indicates Required Information

First Name: Last Name: *

Select PCMM Primary Providers:

MHVPERFSMDOCTOR, ALFRED ONE
MHVPERFSMDOCTOR, BERNICE TWO
MHVPERFSMDOCTOR, CHARLES THREE
MHVPERFSMDOCTOR, DONNA FOUR
MHVPERFSMDOCTOR, EDGAR FIVE
MHVPERFSMDOCTOR, FIONA SIX
MHVPERFSMDOCTOR, GARY SEVEN
MHVPERFSMDOCTOR, HARRIET EIGHT
MHVPERFSMDOCTOR, IKE NINE
MHVPERFSMDOCTOR, JANICE TEN

Selected PCMM Primary Providers:

The system will generate a list of PCMM Primary Providers meeting the search criteria. Select the name(s) of the PCMM Primary Provider(s) in the left column (remember you can select more than one provider by pressing the Ctrl key when selecting) and then click the **Add ->** button. This moves the selected Provider name(s) to the Selected PCMM Primary Providers column on the right side.

Create a New Triage Group

Define Relationships

[Step 1](#) ... [Step 2](#) ... **Step 3**

Triage Group Name:

TEST Secure Messaging Team

Define Patient / Triage Group Relationships

Define the patient groups who have a relationship with this Triage Group

Selected Facility:

VISN: VISN 4

Facility: PITTSBURGH (UD), PA VAMC

Search for PCMM Primary Providers

* Indicates Required Information

First Name: Last Name:

Search

Cancel

Select PCMM Primary Providers:

MHVPERFSMDOCTOR, ALFRED ONE
MHVPERFSMDOCTOR, BERNICE TWO
MHVPERFSMDOCTOR, CHARLES THREE
MHVPERFSMDOCTOR, DONNA FOUR
MHVPERFSMDOCTOR, EDGAR FIVE
MHVPERFSMDOCTOR, FIONA SIX
MHVPERFSMDOCTOR, GARY SEVEN
MHVPERFSMDOCTOR, HARRIET EIGHT
MHVPERFSMDOCTOR, IKE NINE
MHVPERFSMDOCTOR, JANICE TEN

Add >

<- Remove

Selected PCMM Primary Providers:

MHVPERFSMDOCTOR, BERNICE TWO
MHVPERFSMDOCTOR, CHARLES THREE
MHVPERFSMDOCTOR, IKE NINE

Note: Multiple items may be selected by pressing the 'Ctrl' key when clicking

Save Relationship

Cancel

When all providers have been selected and moved to the Selected PCMM Primary Providers column, click the **Save Relationship** button. Now any patients associated with the selected PCMM Primary Providers' panel will have the ability to message this Triage Group. If a Provider is added to the listing by mistake, select that Provider's name in the Selected PCMM Primary Provider column and click the **<-Remove** button.

Create a New Triage Group

Define Relationships

[Step 1](#) [Step 2](#) [Step 3](#)

Triage Group Name:

TEST Secure Messaging Team

Triage Group Staff:

Selected Facility:

VISN: VISN 4

Facility: PITTSBURGH (UD), PA VAMC

Group Members:

MHVPERFSMDOCTOR, BERNICE TWO
MHVPERFSMDOCTOR, CHARLES THREE
MHVPERFSMDOCTOR, IKE NINE

Define Patient / Triage Group Relationships

Define the patient groups who have a relationship with this Triage Group

PCMM Primary Providers

Patients with the following PCMM Primary Providers:

[Define Relationship](#)

Clinics

Patients with appointments scheduled between 365 days before and 365 days after today's date, at the following Clinics:

[Define Relationship](#)

OE/RR Teams

Patients who are members of the following OE/RR Teams:

[Define Relationship](#)

Patients

Add Patients manually:

[Save Group](#)

[Cancel](#)

Clinics – First search for the Clinic by entering the Clinic Name as it appears in CPRS and then click the **Search** button.

Create a New Triage Group

Define Relationships

[Step 1](#) [Step 2](#) [Step 3](#)

Triage Group Name:

TEST Secure Messaging Team

Define Patient / Triage Group Relationships

Define the patient groups who have a relationship with this Triage Group

Selected Facility:

VISN: VISN 4

Facility: PITTSBURGH (UD), PA VAMC

Search for Clinics

* Indicates Required Information

Clinic Name:*

hb

[Search](#)

[Cancel](#)

Select Clinics:

HB-CORE/MID
HB-CORE/MID-GROUP
HB-CORE/PHD
HB-CORE/PHD-GROUP
HB-CORE/RN
HB-CORE/RN-GROUP
HB-CORE/SWS
HB-CORE/SWS-GROUP
HB-CORE/TECH
HB-CORE/TECH-GROUP

[Add ->](#)

[-< Remove](#)

Selected Clinics:

(empty list)

Note: Multiple items may be selected by pressing the "Ctrl" key when clicking

Appointment Range:

A patient will be considered to have a relationship with a clinic if he or she has appointments scheduled between 365 days before and 365 days after today's date

[Save Relationship](#)

[Cancel](#)

The system will generate a list of Clinics meeting the search criteria. Select the name(s) of the Clinic(s) in the left column (remember you can select more than one clinic by pressing the Ctrl key when selecting) and then click the **Add ->** button. This moves the selected Clinic name(s) to the Selected Clinic column on the right side.

Create a New Triage Group

Define Relationships

[Step 1](#) [Step 2](#) [Step 3](#)

Triage Group Name:
TEST Secure Messaging Team

Define Patient / Triage Group Relationships

Define the patient groups who have a relationship with this Triage Group

Selected Facility:

VISN: VISN 4
Facility: PITTSBURGH (UD), PA VAMC

Search for Clinics

* Indicates Required Information

Clinic Name:*

Select Clinics:

HB-13E-(4P-MID) (NC)-X
HB-13E-(8A-4P) (NC)-X
HB-13E-(MID-8A) (NC)-X
HB-13W-(4P-MID) (NC)-X
HB-13W-(8A-4P) (NC)-X
HB-13W-(MID-8A) (NC)-X
HB-15E-(4P-MID) (NC)-X
HB-15E-(8A-4P) (NC)-X
HB-15E-(MID-8A) (NC)-X
HB-BETA TLC

Selected Clinics:

HB-CORE/RN
HB-CORE/SWS

Note: Multiple items may be selected by pressing the "Ctrl" key when clicking

Appointment Range:

A patient will be considered to have a relationship with a clinic if he or she has appointments scheduled between 365 days before and 365 days after today's date

When all clinics have been selected and moved to the Selected Clinics column, click the **Save Relationship** button. Now any patients with appointments scheduled between 365 days before and 365 days after today's date at the selected Clinics will be able to message this Triage Group. If a Clinic name is added to the Selected Clinic column by mistake, select the Clinic name and click the **<- Remove** button.

Create a New Triage Group

Define Relationships

[Step 1](#) -- [Step 2](#) -- **Step 3**

Triage Group Name:

TEST Secure Messaging Team

Triage Group Staff:

Selected Facility:

VISN: VISN 4

Facility: PITTSBURGH (UD), PA VAMC

Group Members:

MHVPERFSMDOCTOR, BERNICE TWO
MHVPERFSMDOCTOR, CHARLES THREE
MHVPERFSMDOCTOR, IKE NINE

Define Patient / Triage Group Relationships

Define the patient groups who have a relationship with this Triage Group

PCMM Primary Providers

Patients with the following PCMM Primary Providers:

Define Relationship

Clinics

Patients with appointments scheduled between 365 days before and 365 days after today's date, at the following Clinics:

Define Relationship

OE/RR Teams

Patients who are members of the following OE/RR Teams:

Define Relationship

Patients

Add Patients manually:

Define Relationship

Save Group

Cancel

OE/RR Teams – First you will search for the OE/RR Team by entering the OE/RR Team Name as it appears in CPRS and then click the **Search** button.

Create a New Triage Group

Define Relationships

[Step 1](#) [Step 2](#) **Step 3**

Triage Group Name:

TEST Secure Messaging Team

Define Patient / Triage Group Relationships

Define the patient groups who have a relationship with this Triage Group

Selected Facility:

VISN:

VISN 4

Facility:

PITTSBURGH (UD), PA VAMC

Search for OE/RR Teams

* Indicates Required Information

OE/RR Team Name:*

MHV

Search

Cancel

Select OE/RR Teams:

MHV AUTHENTICATED PATIENTS
MHV AUTHENTICATED PTS 11-16-21
MHV TEST NOVEMBER

Selected OE/RR Teams:

Add ->

<- Remove

Note: Multiple items may be selected by pressing the "Ctrl" key when clicking

Save Relationship

Cancel

The system will generate a list of OE/RR Teams meeting the search criteria. Select the name(s) of the OE/RR Team(s) in the left column (remember you can select more than one team by pressing the Ctrl key when selecting) and then click the Add -> button. This moves the selected OE/RR Team name(s) to the Selected OE/RR Teams column on the right side.

Create a New Triage Group

Define Relationships

[Step 1](#) [Step 2](#) **Step 3**

Triage Group Name:

TEST Secure Messaging Team

Define Patient / Triage Group Relationships

Define the patient groups who have a relationship with this Triage Group

Selected Facility:

VISN:

VISN 4

Facility:

PITTSBURGH (UD), PA VAMC

Search for OE/RR Teams

* Indicates Required Information

OE/RR Team Name:*

MHV

Search

Cancel

Select OE/RR Teams:

MHV AUTHENTICATED PTS 11-16-21
MHV TEST NOVEMBER

Selected OE/RR Teams:

MHV AUTHENTICATED PATIENTS

Add ->

<- Remove

Note: Multiple items may be selected by pressing the "Ctrl" key when clicking

Save Relationship

Cancel

When all teams have been selected and moved to the Selected OE/RR Teams column, click the **Save Relationship** button. Now any patients who are members of the selected OE/RR Teams are able to message this Triage Group. If an OE/RR Team is added to the Selected OE/RR Teams column by mistake, select the team name and click the <- Remove button.

Create a New Triage Group

Define Relationships

Step 1 Step 2 Step 3

Triage Group Name:
TEST Secure Messaging Team

Triage Group Staff:

Selected Facility:

VISN: VISN 4
Facility: PITTSBURGH (UD), PA VAMC

Group Members:

- MHVPERFSMDOCTOR, BERNICE TWO
- MHVPERFSMDOCTOR, CHARLES THREE
- MHVPERFSMDOCTOR, IKE NINE

Define Patient / Triage Group Relationships
Define the patient groups who have a relationship with this Triage Group

PCMM Primary Providers
Patients with the following PCMM Primary Providers: **Define Relationship**

Clinics
Patients with appointments scheduled between 365 days before and 365 days after today's date, at the following Clinics: **Define Relationship**

OE/RR Teams
Patients who are members of the following OE/RR Teams: **Define Relationship**

Patients
Add Patients manually: **Define Relationship**

Save Group **Cancel**

Patients – Search for the patient by entering the First Letter of Last Name + Last 4 of Social Security Number (SSN) or First and/or Last Name and then click the **Search** button.

Create a New Triage Group

Define Relationships

Step 1 Step 2 Step 3

Triage Group Name:
TEST Secure Messaging Team

Define Patient / Triage Group Relationships
Define the patient groups who have a relationship with this Triage Group

Selected Facility:

VISN: VISN 4
Facility: PITTSBURGH (UD), PA VAMC

Manual Search for Patients

* Indicates Required Information

To search, you must either enter a Last Name, 'First Letter of Last Name + Last 4 of SSN', or Both.

First Letter of Last Name + Last 4 of SSN:

First Name:	Last Name:	Search	Cancel
-------------	------------	--------	--------

Select Patients:

--

Add ->
<- Remove

Selected Patients:

--

Note: Multiple items may be selected
by pressing the "Ctrl" key when
clicking

Save Relationship Cancel

The system will generate a list of patients meeting the search criteria. Select the name of the patient(s) in the left column (remember you can select more than one patient by pressing the Ctrl key when selecting) and then click the **Add ->** button. This moves the selected patient name(s) to the Selected Patients column on the right side. ***Please note...** you can enter another patient's name and click the **Search** button to pull up more patients to add to the group.

When all patients have been selected and moved to the Selected Patients column, click the **Save Relationship** button. Now the patient(s) who have been manually associated are able to send messages to this Triage Group. If a patient is added to the Selected Patients column by mistake, select the patient name and click the **<-Remove** button.

Once all Patient/Triage Group Relationships have been established, make sure you click the **Save Group** button at the bottom of the screen.

Create a New Triage Group

Define Relationships

Step 1 Step 2 Step 3

Triage Group Name:
TEST Secure Messaging Team

Triage Group Staff:

Selected Facility:

VISN: VISN 4
Facility: PITTSBURGH (UD), PA VAMC

Group Members:

MHVPERFSMDOCTOR, BERNICE TWO
MHVPERFSMDOCTOR, CHARLES THREE
MHVPERFSMDOCTOR, IKE NINE

Define Patient / Triage Group Relationships
Define the patient groups who have a relationship with this Triage Group

PCMM Primary Providers Patients with the following PCMM Primary Providers:	Define Relationship
Clinics Patients with appointments scheduled between 365 days before and 365 days after today's date, at the following Clinics:	Define Relationship
OE/RR Teams Patients who are members of the following OE/RR Teams:	Define Relationship
Patients Add Patients manually:	Define Relationship

Save Group **Cancel**

View or Modify an Existing Triage Group

From the Administrative Functions Home page, click the [View or Modify an Existing Triage Group](#) link located under Manage Triage Groups (see orange box below).

The screenshot shows the 'Secure Messaging' section of the My healthvet website. The left sidebar contains a navigation menu with categories like 'Administrative Functions', 'Triage Groups', 'System Administration', 'User Configuration', and 'System Reports'. The 'Triage Groups' category is currently selected and highlighted with an orange border. The main content area is titled 'Administrative Functions' and contains three boxes: 'Manage Triage Groups' (with sub-options: Create or Modify a group of Clinicians and Staff to function as a Triage Group; Create a New Triage Group; View or Modify an Existing Triage Group; Associate SM Clinic to Triage Group), 'System Reports' (with sub-options: Show Counts/Trends; Show Lists; Search By Patient; Search By Staff), and 'Manage Staff Members' (with sub-options: Activate, deactivate or reactivate staff members). The top right corner shows a user logged in as 'Brian Miller'.

Step 1 – Select a VISN for the existing Triage Group from the drop-down list and then click the **Select** button.

This screenshot shows a modal dialog box titled 'Edit a Triage Group' with a progress bar at the top indicating 'Step 1 --- Step 2 --- Step 3 --- Step 4'. The main content area is labeled 'Select a VISN:' and features a dropdown menu with a small downward arrow icon. Below the dropdown are two buttons: 'Select' and 'Cancel'.

Step 2 – Select a facility for the existing Triage Group from the drop-down list and then click the **Select** button.

This screenshot shows a continuation of the 'Edit a Triage Group' process. The title 'Edit a Triage Group' is repeated at the top, along with the progress bar 'Step 1 --- Step 2 --- Step 3 --- Step 4'. Below the title, it says 'VISN: VISN 4 ([Change VISN](#))'. The next step is 'Select a Facility:', with a dropdown menu and 'Select' and 'Cancel' buttons.

Step 3 – Select a Triage Group from the drop-down list and then click the **Select** button.

Edit a Triage Group

Step 1 --- Step 2 --- **Step 3** --- Step 4

VISN: VISN 4 ([Change VISN](#))
Facility: PITTSBURGH (UD), PA VAMC ([Change Facility](#))

Select a Triage Group:

Step 4 – At this point you can make changes to the team members or the relationships. If you choose to make a change, be sure to click the **Save Group** button at the bottom of the screen (this is a common mistake). You can also delete an existing Triage Group by clicking the **Delete** button at the bottom of the screen. A triage group will not delete if there are Secure Messages that still require a response/completion.

Edit a Triage Group

Step 1 --- Step 2 --- Step 3 --- **Step 4**

Triage Group Name:
 [Select a Different Triage Group](#)

Triage Group Staff:
Selected Facility:
VISN: VISN 4
Facility: PITTSBURGH (UD), PA VAMC

Select Providers and Staff to Add:

MHVPERFSMDOCTOR, ALFRED ONE
MHVPERFSMDOCTOR, BERNICE TWO
MHVPERFSMDOCTOR, CHARLES THREE
MHVPERFSMDOCTOR, DONNA FOUR
MHVPERFSMDOCTOR, EDGAR FIVE
MHVPERFSMDOCTOR, FIONA SIX
MHVPERFSMDOCTOR, IKE NINE
MHVPERFSMDOCTOR, JANICE TEN

MHVPERFSMDOCTOR, BERNICE TWO
MHVPERFSMDOCTOR, CHARLES THREE
MHVPERFSMDOCTOR, IKE NINE

Note: Multiple items may be selected by pressing the "Ctrl" key when clicking

Define Patient / Triage Group Relationships
Define the patient groups who have a relationship with this Triage Group

PCMM Primary Providers
Patients with the following PCMM Primary Providers:

Clinics
Patients with appointments scheduled between 365 days before and 365 days after today's date, at the following Clinics:

OE/RR Teams
Patients who are members of the following OE/RR Teams:

Patients
Add Patients manually:

Manage Triage Group for SM Clinic

From the Administrative Functions Home page, click the [Associate SM Clinic to Triage Group](#) link located under Manage Triage Groups (see orange box below).

The screenshot shows the 'Administrative Functions' page. On the left, a vertical menu includes 'Functions Home', 'Triage Groups' (which is highlighted with an orange box), 'Edit a Triage Group', 'System Administration', 'Manage Staff Members', 'View Staff Messages', 'Manage Triage Group for SM Clinic', 'User Configuration', 'User Participation Status', 'Change User Information', 'Manage User Surrogates', 'Block a Patient's Access', 'Add Patients to Facility', and 'System Reports'. The main content area has three sections: 'Manage Triage Groups' (with sub-links for creating or modifying groups, creating a new group, viewing or modifying existing groups, and associating SM Clinic to Triage Group), 'System Reports' (with links for show counts/trends, show lists, search by patient, and search by staff), and 'Manage Staff Members' (with links for activating, inactivating, or reactivating staff members). The top right corner shows a secure messaging icon and the message 'You are logged in as: Brian Miller'.

Step 1 – Select a VISN for the existing Triage Group from the drop-down list and then click the **Select** button.

The dialog box title is 'Associate Triage Group to SM Clinic'. At the top right, it says 'Step 1 --- Step 2 --- Step 3 --- Step 4'. Below that is a label 'Select a VISN:' followed by a dropdown menu containing 'VISN 19'. At the bottom are 'Select' and 'Cancel' buttons.

Step 2 – Select a facility for the existing Triage Group from the drop-down list and then click the Select button.

The dialog box title is 'Associate Triage Group to SM Clinic'. At the top right, it says 'Step 1 --- Step 2 --- Step 3 --- Step 4'. Below that is a label 'VISN: VISN 19 ([Change VISN](#))' followed by a dropdown menu containing 'DAYT29'. At the bottom are 'Select' and 'Cancel' buttons.

Step 3 – Select a Triage Group from the drop-down list and then click the **Select** button.

Associate Triage Group to SM Clinic

Step 1 -- Step 2 -- **Step 3** -- Step 4

VISN: VISN 19 ([Change VISN](#))
Facility: DAYT29 ([Change Facility](#))
Select a Triage Group:

Training Test

Step 4 –Search for the SM Clinics by entering the SM Clinic Name and then click the **Search** button.

Associate Triage Group to SM Clinic

Step 1 -- Step 2 -- Step 3 -- **Step 4**

Triage Group Name:
Training Test

Selected Facility:
VISN: VISN 19
Facility: DAYT29

Search for SM Clinics
* Indicates Required Information

SM Clinic Name:*

Select SM Clinic:

Note: Only one clinic can be associated at a time to the triage group. To add another clinic, please remove previously added clinic and then add another clinic.

Selected SM Clinic:

Select CPRS Title
Select a CPRS Title

The system will generate a list of SM Clinics meeting the search criteria. Select the name of the SM Clinic in the left column and then click the **Add ->** button. This moves the selected SM Clinic to the Selected SM Clinic column on the right side.

Associate Triage Group to SM Clinic

[Step 1](#) -- [Step 2](#) -- [Step 3](#) -- **Step 4**

Triage Group Name:
Training Test

Selected Facility:

VISN: VISN 19
Facility: DAYT29

Search for SM Clinics

* Indicates Required Information

SM Clinic Name:*

cardio

Select SM Clinic:

CARDIO CARDIOVERSION [IEN:3506]
CARDIO CATH (EC) [IEN:4101]
CARDIO CATH LAB [IEN:1349]
CARDIO CONSULT/TUESDAY (N) [IEN:208]
CARDIO DOLBU STRESS THALLIUM [IEN:3475]
CARDIO DOLBUTAMINE STRESS ECHO [IEN:3424]
CARDIO ECHO [IEN:1347]
CARDIO ELECTROCARDIOGRAM (AM) [IEN:239]
CARDIO FELLOW #1 [IEN:3112]
CARDIO FELLOW #2 [IEN:3113]

Add →

<- Remove

Selected SM Clinic:

Note: Only one clinic can be associated at a time to the triage group. To add another clinic, please remove previously added clinic and then add another clinic.

Select CPRS Title

Select a CPRS Title

If a SM Clinic is added to the column by mistake, select the SM Clinic in the Selected SM Clinic column and click the <-Remove button.

After the SM Clinic has been selected and moved to the Selected SM Clinic column, select a CPRS Title from the drop-down list.

Associate Triage Group to SM Clinic

[Step 1](#) -- [Step 2](#) -- [Step 3](#) -- **Step 4**

Triage Group Name:

Training Test

Selected Facility:

VISN: VISN 19

Facility: DAYT29

Search for SM Clinics

* Indicates Required Information

SM Clinic Name:*

cardio

Search

Cancel

Select SM Clinic:

- CARDIO CARDIOVERSION [IEN:3506]
- CARDIO CATH (EC) [IEN:4101]
- CARDIO CATH LAB [IEN:1349]
- CARDIO CONSULT/TUESDAY (N) [IEN:208]
- CARDIO DOLBU STRESS THALLIUM [IEN:3475]
- CARDIO DOLBUTAMINE STRESS ECHO [IEN:3424]
- CARDIO ECHO [IEN:1347]
- CARDIO ELECTROCARDIOGRAM (AM) [IEN:239]
- CARDIO FELLOW #1 [IEN:3112]
- CARDIO FELLOW #2 [IEN:3113]

<- Remove

Selected SM Clinic:

CARDIO KING OF HEARTS

Note: Only one clinic can be associated at a time to the triage group. To add another clinic, please remove previously added clinic and then add another clinic.

Select CPRS Title

ZZZ-SECURE MESSAGING

Save Relationship

Cancel

When the SM Clinic and CPRS Title have been selected, make sure you click the **Save Relationship** button.

User Configuration

Secure Messaging Administrators have several other options within the SM Administrative Portal. Under User Configuration you can update a user's participation status, change a user's information within the SM Administrative Portal, help manage user's surrogates, block a patient's access (if necessary), and add a patient to a facility.

User Participation Status

From the Administrative Functions Home page, click the [User Participation Status](#) link located under User Configuration (see orange boxes below).

The screenshot shows the 'Administrative Functions' page. On the left, a sidebar lists 'Administrative Functions' including 'Functions Home', 'Triage Groups' (with 'Create a Triage Group' and 'Edit a Triage Group' options), 'System Administration' (with 'Manage Staff Members', 'View Staff', 'Messages', 'Manage Triage Group for SM Clinic'), 'User Configuration' (with 'User Participation Status', 'Change User Information', 'Manage User Surrogates', 'Block a Patient's Access', 'Add Patients to Facility'), and 'System Reports' (with 'Select a Report'). The main content area is titled 'Administrative Functions' and contains two columns of links: 'Manage Triage Groups' (with 'Create or Modify a group of Clinicians and Staff to function as a Triage Group' and 'Create a New Triage Group' options) and 'System Reports' (with 'Show Counts/Trends', 'Show Lists', 'Search By Patient', and 'Search By Staff' options). Below these are two more sections: 'Manage Staff Members' (with 'Activate, deactivate or reactivate staff members' option) and 'User Configuration' (with 'User Participation Status', 'Manage User Surrogates', 'Block a Patient's Access', and 'Add Patients to Facility' options). The 'User Participation Status' link in the 'User Configuration' section is highlighted with an orange box.

To change a user's participation status, first you will select a VISN from the drop-down list and click the **Select** button.

User Participation Status

Select Users and Change their Participation Status

Select a Facility:

Selecting a Facility will help to narrow the list of VA staff who can be selected to participate in Secure Messaging. Begin by selecting a VISN.

VISN:

-- Select a VISN --

Select

Cancel

Then select a Facility from the drop-down list and click the **Select** button.

User Participation Status

Select Users and Change their Participation Status

Select a Facility:

Selecting a Facility will help to narrow the list of VA staff who can be selected to participate in Secure Messaging.

VISN:

VISN 6 ([Change VISN](#))

Facility:

-- Select a Facility --

Select

Cancel

The system will generate a list of clinicians and staff. Select the Clinician/Staff member's name (remember you can select more than one clinician/staff name by pressing the Ctrl key when selecting) and click the **Add ->** button. This moves the selected name(s) to the Selected Users column on the right side. To remove a Clinician/Staff member from the Selected Users column, select the name and click the **<-Remove** button.

User Participation Status

Select Users and Change Their Participation Status

Select Facility:

Facility: SALEM VAMC ([Change Facility](#))

Select Clinicians and Staff to Add

MHVPERFSMDOCTOR, ALFRED ONE
MHVPERFSMDOCTOR, BERNICE TWO
MHVPERFSMDOCTOR, CHARLES THREE
MHVPERFSMDOCTOR, DONNA FOUR
MHVPERFSMDOCTOR, EDGAR FIVE
MHVPERFSMDOCTOR, FIONA SIX
MHVPERFSMDOCTOR, GARY SEVEN
MHVPERFSMDOCTOR, HARRIET EIGHT
MHVPERFSMDOCTOR, IKE NINE
MHVPERFSMDOCTOR, JANICE TEN

Note: Multiple items may be selected by pressing the 'Ctrl' key when clicking

Selected Users

Add ->

<- Remove

Opt In Opt Out

Save Status

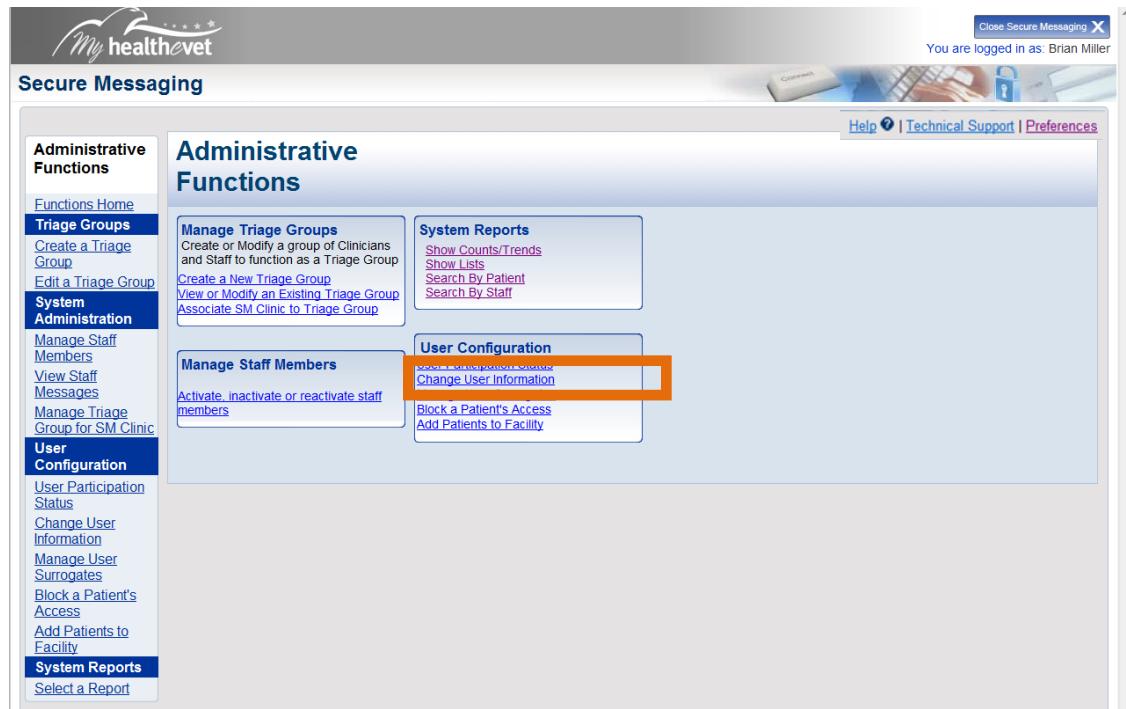
Cancel

Select the radio button for either **Opt In** or **Opt Out** and then click the **Save Status** button. ***Please note... Activating a staff member's account will

automatically change the participation status to Opt In; no further action is required.

Change User Information

From the Administrative Functions Home page, click the [Change User Information](#) link located under User Configuration (see orange boxes below).



The VISN will already be selected per your location. Select a Facility from the drop-down list and click the **Select** button.

Change User Information

Select User and Change their information

Select a Facility

Selecting a Facility will help to narrow the list of VA staff whose information can be changed.

VISN: VISN 20

Facility:

The system will generate a list of providers and staff at your facility. Select the name of the provider/staff and click the **Select** button.

Change User Information

Select User and Change their information

VISN: VISN 19

Selected Facility:

Facility: SLC10 TEST LAB

Select providers and staff to modify:

MHVSMSTAFFFIVE, ALICE (Triage Staff) TESTMHVSMSTAFFONE, TESTTESTCAROL (Triage Staff) TESTMHVSMSTAFFTWO, TESTTESTMARSHA (Triage Staff)	<input type="button" value="Select"/> <input type="button" value="Cancel"/>
---	---

Make sure the provider/staff member under Selected User is the one to be modified. If it is not the correct provider/staff member, click the **Select Another User** button to locate another user.

Change User Information

Select User and Change their information

VISN: VISN 20

Selected Facility:

Facility: PORTLAND (OR) VAMC ([Change Facility](#))

<p>Selected User:</p> <p>Name: MILLER, Brian Network ID: vhapormilleb6 Duz: 196951 User Type: Clinical Team Member</p> <p>Select Another User</p>	<p>Modify User Information</p> <p>First Name: Brian Last Name: MILLER</p> <p>User Type: Clinical Team Member</p> <p>Network ID: vhapormilleb6</p> <p>Duz: 196951</p> <p>Email: Brian.Miller6@va.gov</p> <p>Apply</p>
--	---

[Cancel](#)

To make changes to the User Type, under Modify User Information select from the drop-down list Provider, Clinical Team Member, or Triage Staff.

To modify the user's Network ID, under Modify User Information enter the Network ID in the field provided.

To modify the user's Email, under Modify User Information enter the correct Email in the field provided.

After making any changes to User Information, click the **Apply** button.

Manage User Surrogates

All health care team members have the ability to set surrogates when they are planning to be away for an extended period of time. They will set their surrogates within their personal Secure Messaging account. As an SM Administrator, you will act as a “check and balance” for the health care team members and their accounts, managing their surrogates if the need arises.

From the Administrative Functions Home page, click the [Manage User Surrogates](#) link located under User Configuration (see orange boxes below).

The screenshot shows the 'Administrative Functions' section of the MyHealthVet Secure Messaging interface. On the left, a sidebar lists various administrative functions. The 'User Configuration' section is expanded, showing links for 'User Participation Status', 'Change User Information', 'Manage User Surrogates', and 'Block a Patient's Access'. The 'Manage User Surrogates' link is highlighted with an orange box. The main content area displays a grid of administrative tasks, with the 'Manage User Surrogates' task also highlighted with an orange box.

First you will select a VISN from the drop-down list and click the **Select** button.

Manage User Surrogates

Select Users and Change their Assigned Surrogate

Select a Facility

Selecting a Facility will help to narrow the list of VA staff whose surrogate assignments can be changed. Begin by selecting a VISN.

VISN:

Then you will select a Facility from the drop-down list and click the **Select** button.

Manage User Surrogates

Select Users and Change their Assigned Surrogate

Select a Facility

Selecting a Facility will help to narrow the list of VA staff whose surrogate assignments can be changed.

VISN: VISN 6 ([Change VISN](#))

Facility:

The system will generate a list of providers and staff. Select the staff member's name and click the **Select** button.

Manage User Surrogates

Select Users and Change their Assigned Surrogate

VISN: VISN 6 ([Change VISN](#))

Selected Facility:

Facility: SALEM VAMC ([Change Facility](#))

Select providers and staff to modify:

MHVPERFSMDOCTOR, ALFRED ONE ()
MHVPERFSMDOCTOR, BERNICE TWO ()
MHVPERFSMDOCTOR, CHARLES THREE ()
MHVPERFSMDOCTOR, DONNA FOUR ()
MHVPERFSMDOCTOR, EDGAR FIVE ()
MHVPERFSMDOCTOR, FIONA SIX ()
MHVPERFSMDOCTOR, GARY SEVEN ()
MHVPERFSMDOCTOR, HARRIET EIGHT ()
MHVPERFSMDOCTOR, IKE NINE ()
MHVPERFSMDOCTOR, JANICE TEN ()

Select Cancel

Double-check to make sure you are working with the correct staff member prior to making any changes. If not, click the **Select Another User** button to begin the process again.

Manage User Surrogates

Select Users and Change their Assigned Surrogate

VISN: VISN 19

Selected Facility:

Facility: SLC10 TEST LAB

Selected User:

Name: TESTMHVSMSTAFFONE, TESTTESTCAROL
Network ID: TESTCMHVSMSMSTAFFONE
Duz:
User Type: Triage Staff

[Select Another User](#)

Surrogate Message Forwarding

Forward any messages that get assigned to you to another Clinician who uses Secure Messaging or a Triage Group.

Surrogate (Staff/Triage Group)

From Date

To Date

All day

-- Select a Staff/Triage Group --	12/01/2010	12/01/2010	<input checked="" type="checkbox"/> clear
-- Select a Staff/Triage Group --	12/01/2010	12/01/2010	<input checked="" type="checkbox"/> clear
-- Select a Staff/Triage Group --	12/01/2010	12/01/2010	<input checked="" type="checkbox"/> clear
-- Select a Staff/Triage Group --	12/01/2010	12/01/2010	<input checked="" type="checkbox"/> clear
-- Select a Staff/Triage Group --	12/01/2010	12/01/2010	<input checked="" type="checkbox"/> clear

[Apply](#)

[Cancel](#)

Once you are sure the correct user is selected, check to see if the user has any assigned surrogates. At this point you can either make changes to the settings or new surrogates can be set up for the user.

Select a surrogate from the Surrogate (Staff/Triage Group) drop-down list to act in their stead, then type in (or select from the calendar) the start and end dates.

If the surrogate is to act all day, leave the **All day** check box marked. If the surrogate is only to act for a certain time period; click on the **All day** check box to remove the check mark.

Manage User Surrogates

Select Users and Change their Assigned Surrogate

VISN: VISN 19
Selected Facility:
Facility: SLC10 TEST LAB

Selected User:

Name: TESTMHVSMSTAFFONE, TESTTESTCAROL
Network ID:TESTCMHVSMSMSTAFFONE
DUZ:
User Type: Triage Staff

[Select Another User](#)

Surrogate Message Forwarding

Forward any messages that get assigned to you to another Clinician who uses Secure Messaging or a Triage Group

Surrogate (Staff/Triage Group)	From Date	To Date	All day
-- Select a Staff/Triage Group --	12/01/2010	12/01/2010	<input type="checkbox"/> clear
-- Select a Staff/Triage Group --	12/01/2010	12/01/2010	<input type="checkbox"/> clear
-- Select a Staff/Triage Group --	12/01/2010	12/01/2010	<input checked="" type="checkbox"/> clear
-- Select a Staff/Triage Group --	12/01/2010	12/01/2010	<input checked="" type="checkbox"/> clear
-- Select a Staff/Triage Group --	12/01/2010	12/01/2010	<input checked="" type="checkbox"/> clear

[Apply](#) [Cancel](#)

Removing the **All day** check mark will provide the option for selecting both a start time and end time from the drop-down list. Once the information is complete for each surrogate (up to 5 surrogates can be set), click the **Apply** button.

Block a Patient's Access

A SM Administrator can also block a patient's access (if the need arises). Check your local facility for guidance on when it is appropriate to block a patient's access.

From the Administrative Functions Home page, click the [Block a Patient's Access](#) link located under User Configuration (see orange boxes below).

The screenshot shows the 'Secure Messaging' interface for 'My healthvet'. The top navigation bar includes 'Close Secure Messaging X', 'You are logged in as: Brian Miller', 'Help ? | Technical Support | Preferences'. The left sidebar has a tree menu under 'Administrative Functions': 'Functions Home', 'Triage Groups' (selected), 'Edit a Triage Group', 'System Administration', 'Manage Staff Members', 'View Staff Messages', 'Manage Triage Group for SM Clinic', 'User Configuration', 'User Participation Status', 'Change User Information', 'Manage User Surrogates', 'Block a Patient's Access', 'Add Patients to Facility', 'System Reports' (selected), and 'Select a Report'. The main content area is titled 'Administrative Functions' and contains three boxes: 'Manage Triage Groups' (with links to Create or Modify a group of Clinicians and Staff to function as a Triage Group, Create a New Triage Group, View or Modify an Existing Triage Group, Associate SM Clinic to Triage Group), 'System Reports' (with links to Show Counts/Trends, Show Lists, Search By Patient, Search By Staff), and 'User Configuration' (with links to User Participation Status, Change User Information, Manage User Surrogates, and Block a Patient's Access). The 'Block a Patient's Access' link is highlighted with a red box.

First you will select a VISN from the drop-down list and click the **Select** button.

The screenshot shows a modal dialog titled 'Block a Patient's Access'. It has a header 'Select a VISN'. Below it is a form field 'VISN:' with a dropdown arrow. To the right are two buttons: 'Select' (highlighted in blue) and 'Cancel'.

Next choose a facility from the drop-down list and then search for the patient by entering Last Name or First Letter of Last Name + Last 4 of Social Security Number (SSN) and click the **Search** button.

Block a Patient's Access

Search for a Patient:

* Indicates Required Information (Last Name or First Letter of Last Name + Last 4 of SSN are required)

Choose Facility

Facility:

First Name: Last Name:*

First Letter of Last Name + Last 4 of SSN:*

The system will generate a list of patient's that match the search criteria. Select the patient from the drop-down list and click the **Select ->** button. This will move the patient's name to the Selected User column on the right side.

Block a Patient's Access

Search for a Patient:

* Indicates Required Information (Last Name or First Letter of Last Name + Last 4 of SSN are required)

Choose Facility

Facility:

First Name: Last Name:*

First Letter of Last Name + Last 4 of SSN:*

Select from the Results:

Select User:

Select ->

Selected User:

Verify the patient's identifying information to ensure you are blocking the correct patient. Select the radio button next to **Blocked** or **Not Blocked** in order to set the desired access status, and enter a comment in the field provided. For example: "05/21/2014, patient X is blocked from using Secure Messaging for thirty days. Next review 6/21/2014." Then click the **Save Status** button.

Select from the Results:

Select User:

Selected User:

Select >

User's Information:

Name:
SSN:
DOB:

Street 1:
Street 2:
City:
St: ZIP:

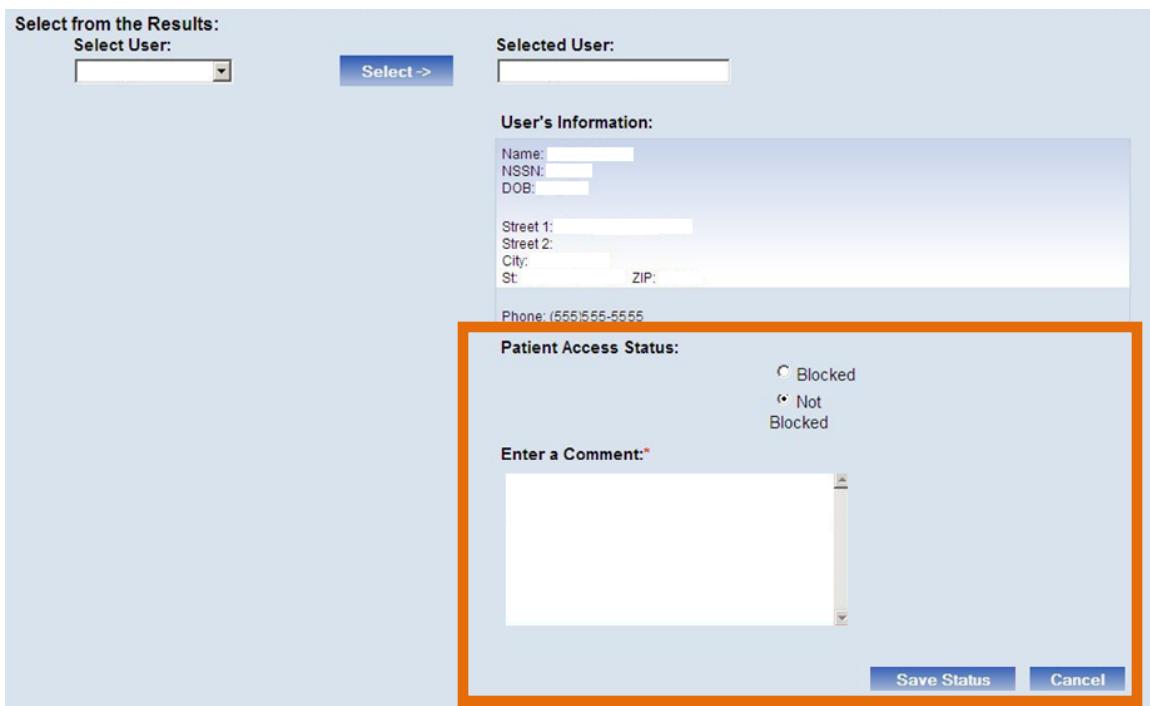
Phone: (655)555-5555

Patient Access Status:

Blocked
 Not Blocked

Enter a Comment:

Save Status Cancel



Add Patients to Facility

When a staff person attempts to reassign a patient's Secure Message to another VA facility and the patient is not enrolled at the other facility, the receiving facility's SM Administrator will receive an Outlook email notification.

After receiving the Outlook Notification, the receiving facility's Secure Messaging Administrator logs into the Secure Messaging Administrative Portal. To see the patient's information, the administrator selects the [Add Patients to Facility](#) link located under System Administration (see orange box below) on the Secure Messaging Administrative Functions Home page,

The screenshot shows the 'Secure Messaging' administrative interface. On the left, a sidebar lists 'Administrative Functions' including 'Triage Groups', 'System Administration', 'User Configuration', and 'System Reports'. The 'User Configuration' section is highlighted with a red box and contains the 'Add Patients to Facility' link, which is also highlighted with a red box. The main content area displays sections for 'Manage Triage Groups', 'System Reports', 'Manage Staff Members', and 'User Configuration', each with their respective sub-links.

First you will select a VISN from the drop-down list and click the **Select** button.

The screenshot shows the 'Add Patients to Facility' page. On the left, a sidebar lists administrative functions: Functions Home, Triage Groups (selected), Create a Triage Group, Edit a Triage Group, System Administration, Manage Staff Members, View Staff Messages, Manage Triage Group for SM Clinic, User Configuration, User Participation Status, Change User Information, Manage User Surrogates, Block a Patient's Access, Add Patients to Facility, and System Reports. The 'Triage Groups' option is highlighted. In the main content area, there is a dropdown menu labeled 'Select a VISN' with 'VISN 20' selected. Below it are 'Select' and 'Cancel' buttons.

Then you will select a Facility from the drop-down list and click the **Select** button.

The screenshot shows the 'Add Patients to Facility' page. The left sidebar is identical to the previous one. In the main content area, the 'Select a Facility' dropdown now shows 'PORTLAND (OR) VAMC'. Below it are 'Select' and 'Cancel' buttons.

A list of patients to be added to the selected facility will appear if there are any to be added. The following instructions are noted: “The following lists the patients that need to be added to the selected facility. Please contact the VistA business team to add these users to the facility. Check on the patient’s name to view the details of this user. Click on the ‘X’ in the delete column to remove the row from the table.”

The screenshot shows the 'My HealtheVet' secure messaging interface. The top navigation bar includes links for 'Close Secure Messaging' and 'You are logged in as: Brian Miller'. Below the navigation is a banner with icons for 'Connect', 'Logout', and a lock. The main title 'Secure Messaging' is at the top left, and the specific page title 'Add Patients to Facility' is centered above the content area.

Administrative Functions:

- [Functions Home](#)
- Triage Groups**
 - [Create a Triage Group](#)
 - [Edit a Triage Group](#)
- System Administration**
 - [Manage Staff Members](#)
 - [View Staff Messages](#)
 - [Manage Triage Group for SM Clinic](#)
- User Configuration**
 - [User Participation Status](#)
 - [Change User Information](#)
 - [Manage User Surrogates](#)
 - [Block a Patient's Access](#)
 - [Add Patients to Facility](#)
- System Reports**
 - [Select a Report](#)

Add Patients to Facility

VISN: VISN 20 ([Change VISN](#))
Facility: PORTLAND (OR) VAMC ([Change Facility](#))

This page lists the patients that need to be added to the selected facility. Please contact the VistA business team to add these users to the facility. Click on the patient's name to view the details of this user. Click on the X in the delete column to remove the row from the table.

Date Requested	Transferring Triage Group	Reassigned By	Patient Name	Delete
03/26/2014 09:33	VISN 11/ Facility 583/ Indianapolis My HealtheVet ask a question\$	GATCHELL, JENNIE	MHVZZVISNLEVEN TEST	<input checked="" type="checkbox"/>

Selecting the Patient Name hyperlink will display the patient demographics information along with the VA treatment facilities of the patient.

Please note: If more patient information or identifiers are needed, please contact the sending facility SM Administrator.

The message will not be automatically reassigned. Once the patient is successfully loaded into the receiving VA facility, the staff who initiated the reassignment to the outside VA facility will need to again take steps to reassign the message.

The screenshot shows the 'My HealthVet' secure messaging interface. The top navigation bar includes 'Close Secure Messaging X', 'You are logged in as: Brian Miller', 'Help ? | Technical Support | Preferences'. The main title is 'Secure Messaging' and the specific page is 'Add Patients to Facility'. On the left, a sidebar under 'Administrative Functions' lists: Status, Change User Information, Manage User Surrogates, Block a Patient's Access, Add Patients to Facility, System Reports, and Select a Report. The main content area displays 'User's Information:' for a user named 'MHVZZVISNELEVEN, TEST' with various fields like Name, NSSN, DOB, Street, City, St, ZIP, and Phone all set to 'null'. It also lists 'Treatment Facilities: PORTLAND (OR) VAMC, INDIANAPOLIS VAMC, AUSTIN'. Below this is a table titled 'Ferring Triage Group' with one row: '3/ Indianapolis My HealtheVet ask' under 'Ferring Triage Group', 'GATCHELL, JENNIE' under 'Reassigned By', and 'MHVZZVISNELEVEN_TEST' under 'Patient Name'. There is a 'Delete' column with a delete icon. At the bottom right of the main content area is a 'Close' button.

Additional Functionality

An additional function within the SM Administrative Portal is the ability to View Staff Messages. This provides the ability to monitor a staff member's use of Secure Messaging – as a way to ensure messages get addressed, do not escalate, and help with troubleshooting issues.

View Staff Messages

From the Administrative Functions Home page, click the [View Staff Messages](#) link located under System Administration (see orange box below).

The screenshot shows the 'Secure Messaging' interface of the MyHealthVet system. The left sidebar has a dark blue header 'Administrative Functions' and a list of links. The 'View Staff Messages' link is highlighted with an orange box. The main content area has a light blue header 'Administrative Functions' and four boxes: 'Manage Triage Groups', 'System Reports', 'Manage Staff Members', and 'User Configuration'. The 'Manage Staff Members' box contains links for activating, inactivating, or reactivating staff members.

The VISN will already be selected per your location. Select a Facility from the drop-down list and click the **Select** button.

View Staff Messages

Select User and View Messages

Select a Facility

Selecting a Facility will help to narrow the list of VA staff whose information can be changed.

VISN: VISN 20

Facility:

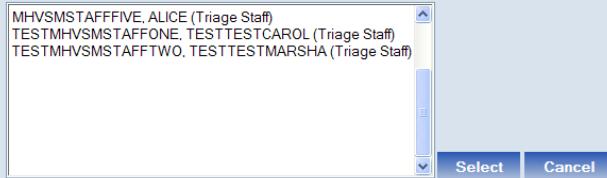
Then select the provider and/or staff to view their messages and click the **Select** button.

View Staff Messages

Select User and View Messages

VISN: VISN 19
Facility: SLC10 TEST LAB

Select providers and staff to view messages:



Once a provider/staff is selected for message viewing, a warning message will appear reminding you that accessing a staff member's account will be tracked in an audit trail and the viewer (you) may be required to prove a legitimate need to review this information. Click the **OK** button.

WARNING: You are about to access the contents of a Secure Message using Administrative SuperUser Functionality. Your access will be tracked in an Audit Trail and you will be required to prove you have a legitimate business need to review this information.

OK

When View Staff Messages first opens you will be in the selected user's Inbox. Any folder within the selected user's account may be viewed. To access a folder, select from the Folder drop-down list the folder you wish to view and click the **Select** button.

View Staff Messages

Select User and View Messages

VISN: VISN 19
Facility: SLC10 TEST LAB

Name: TESTMHVSMSTAFFONE, TESTTESTCAROL ([Change User](#))
Network ID: TESTCMHVSMSSTAFFONE

Folder:

Messages 1 to 5 of 5

From	To	Subject	Date	Assigned	Status	Read Receipt
MHVSMSTAFFFIVE, ALICE	SLC10	HPTI TEST	10/20/2010 01:02 PM			
MHVTESTNEWTWO, TESTNEWTWO	SLC10	Test Message	10/19/2010 03:26 PM	MHVSMSTAFFFIVE, ALICE	In process	READ
MHVSMNINE, MABEL	SLC10 June 25 triage test	tetwr	06/02/2010 09:33 PM	MHVSMSTAFFFIVE, ALICE	In process	READ
MHVSMNINE, MABEL	SLC10 June 25 triage test	test	06/02/2010 02:40 PM			
MHVSMNINE, MABEL	SLC10 June 25 triage test	Patient to Triage test	03/22/2010 09:10 AM	MHVSMSTAFFFIVE, ALICE	In process	READ

*****Please note...** While all messages can be opened and viewed, you are not able to reply (or act on the user's behalf) to the messages. Opening an unassigned message will **not** automatically assign the message to you.

To open a specific message, select the Subject link of the message.

View Staff Messages

Select User and View Messages

VISN: VISN 19
Facility: SLC10 TEST LAB

Name: TESTMHVSMSTAFFONE, TESTTESTCAROL ([Change User](#))
Network ID: TESTCMHVSMSSTAFFONE

Folder:

Messages 1 to 5 of 5

From	To	Subject	Date	Assigned	Status	Read Receipt
MHVSMSTAFFFIVE, ALICE	SLC10	HPTI TEST	10/20/2010 01:02 PM			
MHVTESTNEWTWO, TESTNEWTWO	SLC10	Test Message	10/19/2010 03:26 PM	MHVSMSTAFFFIVE, ALICE	In process	READ
MHVSMNINE, MABEL	SLC10 June 25 triage test	tetwr	06/02/2010 09:33 PM	MHVSMSTAFFFIVE, ALICE	In process	READ
MHVSMNINE, MABEL	SLC10 June 25 triage test	test	06/02/2010 02:40 PM			
MHVSMNINE, MABEL	SLC10 June 25 triage test	Patient to Triage test	03/22/2010 09:10 AM	MHVSMSTAFFFIVE, ALICE	In process	READ

*****Please note...** After opening a message, you will only have the ability to view the message. Under Internal Healthcare Team Communications in the lower right side of the screen you will see who the message is assigned, the message status, and any internal comments made by the health care team.
After viewing the message, click the **Close** button.

View Staff Messages

Select User and View Messages

VISN: VISN 4
Facility: PITTSBURGH (UD), PA VAMC

Name: (Change User)
Network ID:

Folder:

Sent: 05/16/2012 12:52 PM
From:
To: PITTSBURGH MY HEALTHEVET CUSTOMER SERVICES
Message ID#:
Subject: General Inquiry

You've been very helpful. Thank you!

Previous Messages in Thread

-----Original Message-----

Sent: 05/16/2012 12:49 PM

From:

To:

Subject: General Inquiry

Thanks for using secure messaging! At this time, you can access your lab results by clicking on the TRACK HEALTH tab, found on the red toolbar that runs across the top of the page. From there, click on the LABS + TESTS button, and then scroll down to the bottom of the screen and click the VIEW MORE button under the section marked VA CHEMISTRY/HEMATOLOGY. This will produce a list of your lab results, arranged by date. I have also attached a copy of the instructions for your reference.

Thanks again for your inquiry. Should you have any further questions, don't hesitate to contact me using this method. Take care!

My HealtheVet Coordinator & Iraq Veteran

-----Original Message-----

Sent: 05/16/2012 12:39 PM

From:

To: PITTSBURGH MY HEALTHEVET CUSTOMER SERVICES

Subject: General Inquiry

Good Afternoon,

I heard that I could find my results on my health net, but I don't know how. Where do I find them? Thanks.

Veteran

Internal Healthcare Team Communications

Assign to:

Message Status:

INCOMPLETE

THIS INFORMATION IS NOT INCLUDED IN MESSAGES SENT TO PATIENTS

System Reports

The SM Administrative Portal allows Administrators to run various reports on the use of the system: Show Counts/Trends, Show Lists, Search By Patient, and Search By Staff. ***Please note... Additional reports are available through the VHA Support Service Center (VSSC) located at <http://vssc.med.va.gov/products.asp?PgmArea=17>. The VSSC is a reporting portal that contains data tools to inform and assist VA staff with making decisions, meeting performance measures, tracking progress, etc. Information is available to assist the My HealtheVet Program by providing reports related to performance, outreach, and operations. These reports allow for the monitoring of progress toward achieving performance goals, how to reach out to patients and expand use of the system, and assist in monitoring various aspects of Secure Messaging activities related to individual staff, patients, teams, and message activity.

Show Counts/Trends

From the Administrative Functions Home page, click the [Show Counts/Trends](#) link located under System Reports (see orange box below).

The screenshot shows the 'Administrative Functions' home page. On the left, there's a sidebar with 'Administrative Functions' listed under 'Functions Home'. Under 'Triage Groups', 'Create a Triage Group' is selected. Under 'System Administration', 'Manage Staff Members' and 'View Staff Messages' are listed. Under 'User Configuration', 'User Participation Status' is selected. Under 'System Reports', 'Select a Report' is listed. The main content area has a title 'Administrative Functions'. It contains three boxes: 'Manage Triage Groups' (with sub-links for creating, modifying, and associating clinics), 'System Reports' (with 'Show Counts/Trends' highlighted with an orange box), and 'User Configuration' (with sub-links for participation status, user information, surrogates, and access). At the top right, it says 'You are logged in as: Brian Miller'.

Depending on your access level (VISN or Facility Administrator), you will be able to create certain reports.

- As a facility SM Administrator you will only be able to create a report for your facility.

- As a VISN SM Administrator you will be able to create a report for your VISN and all the facilities within your VISN. (One thing to note for a VISN report – you will not be able to select the subcategories Patients – Associated, Team – Message In Process, Team – Message Read, or Team – Message Unread.)

To create a report, select a Date Range, Filter, and Subcategory(s), and then click the **Create Report** button.

System Reports ([select another report](#))

Counts and Trends

Date Range:*
 Day Start:
 Week Start:
 Month Start:
 Quarter Start:
 Fiscal Year Start:

End:

Filter:*
Level of Analysis:

Subcategory:*
 Message - Average Completion Times
 Message - Completion within Target
 Message - Escalated
 Message - Maximum Completion Times
 Message - Minimum Completion Times
 Message - Subject: Appointment
 Message - Subject: General (default)
 Message - Subject: Medication
 Message - Subject: Test
 Message - Threads
 Message - Volume Completion
 Message - Volume Inbound
 Message - Volume Outbound
 Message - Volume Total
 Patients - Action Pending
 Patients - Associated
 Patients - Blocked
 Patients - Opted In
 Patients - Opted Out
 Patients - Unique Senders**
 Team - CPRS TIU Progress Note
 Team - First Message Resolution Rate
 Team - Message Completed By Admin Staff
 Team - Message Completed By Clinical Team Member
 Team - Message Completed By Provider
 Team - Message In Process
 Team - Message Read
 Team - Message Unread
 Team - Unique Member Senders**

** Running this report may have an effect on performance of the Admin Portal

[Create Report](#) | [Cancel](#)

You can print the report by clicking the **Printer Friendly** icon/link; you can also download the report as a CSV file by clicking the **Download Results as a CSV File** icon/link. You can create another report by clicking the **Run Another Report** button.

System Reports

Counts and Trends [counts / trends](#) / [dashboard](#) Subcategory: All

Report Results
This report was generated on 01/31/2011 11:58 AM

Report Parameters: Type: COUNTS, Period: MONTH, Date Range: 12/01/2010 - 12/31/2010, Filter: TEAM, Data Refreshed as of: 01/30/2011

VISN	FACILITY	TEAM NAME
VISN 19	979	SLC10 Dec 2010
		Team - Message Completed By Admin Staff
		Team - Message Completed By Clinical Team Member
		Team - Message Completed By Provider

Printer Friendly **Run Another Report** **Download Results as a CSV file**

Legend

Subcategory	Description
Team - Message Completed By Admin Staff	Count/percentage of completed messages during a given time period by user type.
Team - Message Completed By Clinical Team Member	Count/percentage of completed messages during a given time period by user type.
Team - Message Completed By Provider	Count/percentage of completed messages during a given time period by user type.

The report results are displayed in table format. To view the report in a chart format, click the [trends](#) link.

System Reports

Counts and Trends count / **trends** / dashboard Subcategory: All [Printer Friendly](#) [Run Another Report](#)

Report Results

This report was generated on 01/31/2011 11:58 AM

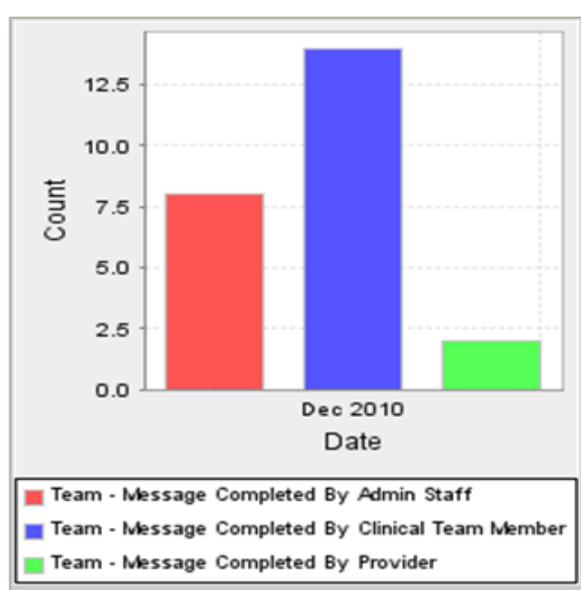
Report Parameters: Type: COUNTS, Period: MONTH, Date Range: 12/01/2010 - 12/31/2010, Filter: TEAM, Data Refreshed as of: 01/30/2011

VISN	FACILITY	TEAM NAME
VISN 19	979	SLC10
		Dec 2010
		Team - Message Completed By Admin Staff
		Team - Message Completed By Clinical Team Member
		Team - Message Completed By Provider

Legend

Subcategory	Description
Team - Message Completed By Admin Staff	Count/percentage of completed messages during a given time period by user type.
Team - Message Completed By Clinical Team Member	Count/percentage of completed messages during a given time period by user type.
Team - Message Completed By Provider	Count/percentage of completed messages during a given time period by user type.

The chart will look something like this:



Show Lists

From the Administrative Functions Home page, click the [Show Lists](#) link located under System Reports (see orange box below).

The screenshot shows the 'Administrative Functions' section of the 'Secure Messaging' module. On the left, a sidebar lists various administrative functions: Triage Groups, System Administration, User Configuration, and System Reports. The 'System Reports' section is currently selected. In the main content area, there are three boxes: 'Manage Triage Groups' (with options like Create a Triage Group and Edit a Triage Group), 'System Reports' (with options like Show Lists, Search By Patient, and Search By Staff, where 'Show Lists' is highlighted with an orange box), and 'Manage Staff Members' (with options like Activate, inactivate or reactivate staff members). The top right corner shows a message: 'You are logged in as: Brian Miller'.

When running Show Lists reports, you will receive a warning message – this is just a precaution and used to discourage you from running large reports at one time. Click the **OK** button.

The screenshot shows the 'System Reports' page. A red box highlights the 'Lists' section. Inside this section, a warning message is displayed in a blue box: 'WARNING: Running this report may have an effect on performance of the Admin Portal.' An 'OK' button is visible below the message. Other report categories like 'Subcategory' and 'Block' are also listed on the left. At the bottom right, there is a 'Create Report' button.

Depending on your access level (VISN or Facility Administrator), you will be able to create certain reports.

- As a facility SM Administrator you will only be able to create a report for your facility. (One thing to note for a Facility report – you will not be able to select SM health care teams.)
- As a VISN SM Administrator you will be able to create a report for your VISN and all the facilities within your VISN. (One thing to note for a VISN

report – you will only be able to select the subcategories Blocked Patients and SM health care teams.)

To create a report, select a Filter and Subcategory(s), and then click the **Create Report** button.

The screenshot shows the 'System Reports' creation interface. At the top, there are links for Help, Technical Support, and Preferences. Below that, the title 'System Reports' is followed by '(select another report)'. A 'Lists' section contains a 'Filter*' dropdown set to 'Level of Analysis: -- Select Team, Facility, or VISN --'. Under 'Subcategory:', there are two columns of checkboxes: 'Action Pending Patients', 'CPRS TIU Progress Note Failure', 'SM Healthcare Team Members'; 'Associated Patients', 'Opted In Patients', 'SM Healthcare Teams'; and 'Blocked Patients', 'Opted Out Patients'. At the bottom right are 'Create Report' and 'Cancel' buttons.

The report results are displayed in table format.

You can print the report by clicking the **Printer Friendly** icon/link; you can also download the report as a CSV file by clicking the **Download Results as a CSV File** icon/link. You can also create another report by clicking the **Run Another Report** button.

The screenshot shows the 'System Reports' results page. At the top, it displays 'Lists Subcategory: All' and 'Report Results' generated on '01/29/2011 03:59 PM'. Below this is a table titled 'Report Parameters: Type: List, Date Range: 01/29/2011, Filter: TEAM'. The table has columns: VISN, FACILITY, TEAM NAME, Last Name, First Name, NSSN, DoB: Month/Day, and Signature. The data shows several entries for 'Opted In Patients' with names like TESTNEWTWO, JOHN, RINGO, BERTHA, and EDNA. An orange box highlights the 'Printer Friendly' and 'Run Another Report' buttons at the top right. Below the table is a 'Legend' section with a table:

Subcategory	Description
Opted In Patients	Patients opt in when they agree to the terms of SM use. This is required to send or receive a message.

Search By Patient

The Search by Patient report allows you to pull up the associations a patient has with which Triage Groups.

From the Administrative Functions Home page, click the [Search By Patient](#) link located under System Reports (see orange box below).

The screenshot shows the 'Administrative Functions' section of the MyHealthVet application. On the left, there is a vertical sidebar with several menu items under 'Administrative Functions'. The 'System Reports' section contains a link labeled 'Search By Patient', which is highlighted with a red box. The main content area displays various administrative tasks such as 'Manage Triage Groups', 'System Reports', 'Manage Staff Members', and 'User Configuration'.

Select a Filter: Level of Analysis by selecting your facility and enter either First Name and Last Name, and/or First Letter of Last Name + Last 4 of Social Security Number (SSN) and then click the **Search** button.

The screenshot shows the 'Search By Patient' report search interface. It includes fields for 'First Name', 'Last Name', and 'First Letter of Last Name + Last 4 of SSN'. There is also a dropdown menu for 'Level of Analysis' and a 'Filter' dropdown. At the bottom right are 'Search' and 'Cancel' buttons.

You can print the report by clicking the **Printer Friendly** icon/link; you can also download the report as a CSV file by clicking the **Download Results as a CSV File** icon/link. You can also create another report by clicking the **Run Another Report** button.

System Reports

The screenshot shows a web-based application interface for 'System Reports'. At the top, there's a navigation bar with three main buttons: 'Printer Friendly' (highlighted with a red box), 'Run Another Report', and 'Download Results as a CSV file'. Below this, a section titled 'Report Results' displays a table of search results. The table has three columns: 'Visn', 'Facility', and 'Team Name'. The data in the table is as follows:

Visn	Facility	Team Name
VISN 19	SLC10 TEST LAB	Doug Test MHV00004826
VISN 19	SLC10 TEST LAB	DougTest_PCMM (SLC10)
VISN 19	SLC10 TEST LAB	jbboyette_SCL10
VISN 19	SLC10 TEST LAB	SLC10
VISN 19	SLC10 TEST LAB	SLC10 June 25 triage test

Search By Staff

The Search by Staff report allows you to pull up the association(s) a staff member has with which Triage Groups.

From the Administrative Functions Home page, click the [Search By Staff](#) link located under System Reports (see orange box below).

The screenshot shows the 'Administrative Functions' section of the MyHealthVet Secure Messaging interface. On the left, a sidebar lists various administrative functions under categories like Triage Groups, System Administration, User Configuration, and System Reports. The 'System Reports' category is currently selected. In the main content area, there are three boxes: 'Manage Triage Groups' (with links to Create or Modify a group of Clinicians and Staff to function as a Triage Group, Create a New Triage Group, View or Modify an Existing Triage Group, and Associate SM Clinic to Triage Group), 'System Reports' (with links to Show Counts/Trends, Show Lists, and Search By Staff), and 'User Configuration' (with links to User Participation Status, Change User Information, Manage User Surrogates, Block a Patient's Access, Add Patients to Facility, and Select a Report). The 'Search By Staff' link in the System Reports box is highlighted with an orange rectangle.

Select a Filter: Level of Analysis by selecting your Facility and enter First Name and/or Last Name, and then click the **Search** button.

The screenshot shows the 'Search By Staff' search interface. It includes fields for 'Filter:' (Level of Analysis:*, dropdown menu for Select Facility or VISN), 'First Name:' (text input field), 'Last Name:*

You can print the report by clicking the **Printer Friendly** icon/link; you can also download the report as a CSV file by clicking the **Download Results as a CSV File** icon/link. You can also create another report by clicking the **Run Another Report** button.

System Reports

Search By Staff

Report Results

This report was generated on 01/29/2011 04:05 PM

[Printer Friendly](#)[Run Another Report](#)[Download Results as a .CSV file](#)

Report Parameters: Type:Search by Staff, Last Name:TESTMHVSMDOCFOUR, First Name:TESTTESTBOBBIE, Clinical User Type:Provider

Visn	Facility	Team Name
VISN 19	SLC10 TEST LAB	SLC10
VISN 19	SLC10 TEST LAB	Test Triage Group - 8.2.1B
VISN 19	SLC10 TEST LAB	testing L cycle

Help, Contact Us, Close Secure Messaging

For any problems with navigating the pages within the Secure Messaging (SM) Administrative Portal, click the **Help** link/icon in the upper right hand corner of the screen.

For any questions, comments, or concerns, click the **Help** link.

REMEMBER... When you have finished using the SM Administrative Portal, click the **Close Secure Messaging** button.



And do not forget to logout of the My HealtheVet Administrative Portal; click the **Logout** link.

