

Joint Legacy Viewer (JLV) 2.6

User Guide



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Revision History

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Artifact Rationale

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

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1. Introduction

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

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

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

This document is intended for VA JLV users supporting the:

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

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

Table 1: JLV User Profiles

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

1.1. Purpose of the Guide


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

The major features of the JLV GUI include:

- Access to patient data (through widgets)
- 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. The portal page displays widgets and the tools that enable quick access to basic features
- **Widget:** A component of the JLV interface that enables a user to view information or perform a function
- **Widget Tray:** An expandable and collapsible tray at the bottom of the portal pages that provides access to all widgets available for placement on the portal pages

1.2. Assumptions

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

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

1.3. System Requirements

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

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

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

1.4. Getting Help

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

REDACTED

2. Logging in to JLV

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

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



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

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

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

2.1. VHA User Log In

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

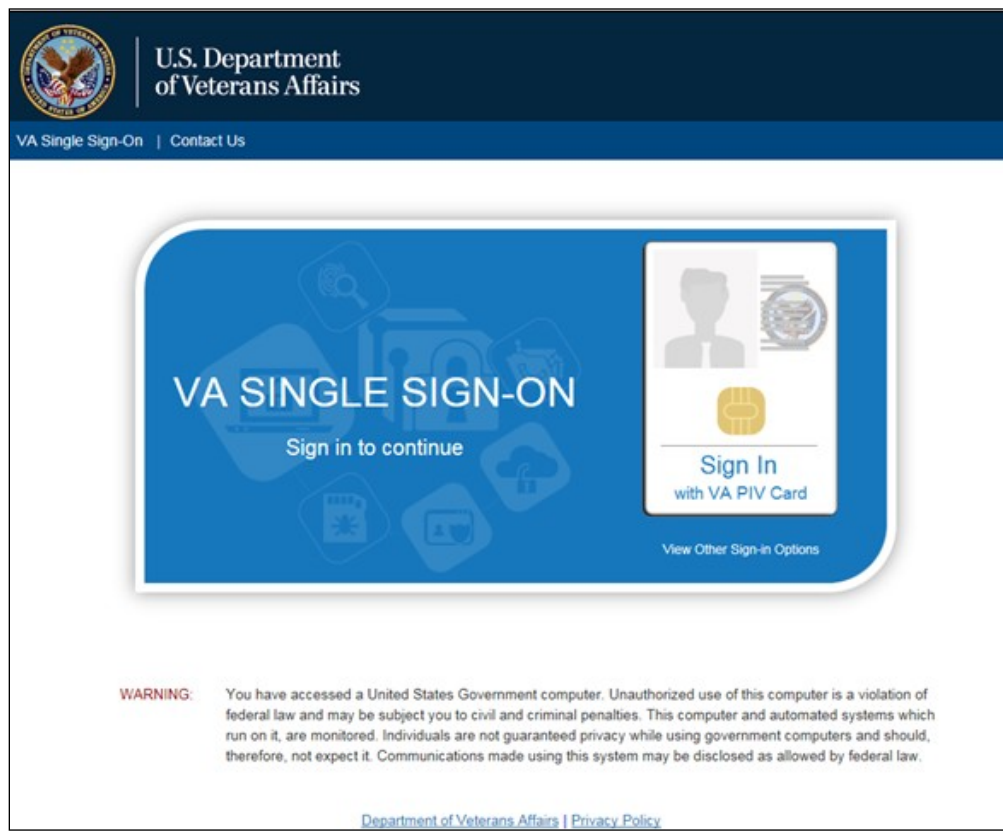
To log in to JLV:

1. Enter VHA's URL for JLV into the address bar of your Internet browser.
REDACTED
2. All VA users will be redirected to the **VA Single Sign-On** page ([Figure 1](#)). VA users must sign in to, and be authenticated by, the Single Sign-On system in order to access JLV.



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

Figure 1: Single Sign-On Page for VA Users



3. Once authenticated by the Single Sign-On system, you are redirected to JLV
4. Read the important user consent information regarding access to a Government information system, and click **I Accept**
5. If desired, check the **Accessibility Mode** option in the top right corner, above the JLV log in page fields. If selected, JLV opens and displays the application in the 508-compliant Accessible User Interface (UI) theme. See [Section 3.2.2, Using the Accessible Theme's Functionality](#), for detailed information
6. Enter your VA log in credentials:
 - a. Enter your CPRS Veterans Health Information Systems and Technology Architecture (VistA) Access Code
 - b. Enter your CPRS (VistA) Verify Code
 - c. Select VA from the **Agency** field
 - d. Select your VA Medical Center or regional Health Care System from the **Site** field
7. Click **Login**

2.2. VBA User Log In

The following instructions apply to VBA users accessing JLV through a URL only.

To log in to JLV:

1. Enter the VBA's URL for JLV into the address bar of your Internet browser.
REDACTED
2. All VA users will be redirected to the **VA Single Sign-On** page ([Figure 1](#)). VA users must sign in to, and be authenticated by, the Single Sign-On system in order to access JLV



Users may select any of the authentication options available through the VA Single Sign-On log in page for access to JLV.

3. Once authenticated by the Single Sign-On system, you are redirected to JLV
4. Read the important user consent information regarding access to a Government information system and click **I Accept**
5. If desired, check the **Accessibility Mode** option in the top right corner, above the JLV log in page fields. If selected, JLV opens and displays the application in the 508-compliant Accessible UI theme. See [Section 3.2.2, Using the Accessible Theme's Functionality](#), for detailed information
6. Enter your log in credentials:
 - a. Enter your Compensation and Pension Record Interchange (CAPRI) Access Code
 - b. Enter your CAPRI Verify Code
7. Click **Login**

2.3. Editing Your User Profile at Log In

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

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

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



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

Figure 2: Edit Profile Link on the JLV Login Page

Joint Legacy Viewer
powered by Janus

Accessibility Mode

VistA Access Code:

VistA Verify Code:

Agency: VA Site: IPOTEST4

[Edit Profile](#)

Login

System Status

✓ JLV data sources available.

[JLV Help](#)

2.3.1. Selecting a UI Theme

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



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

2.3.2. Community Data Display

In a future release, checking (enabling) the **Include Community Data** option will tell JLV to query for, receive, and integrate patient data from external VA VLER community partner data

sources. The community data setting is in the bottom half of the **Edit Profile** dialog, seen in [Figure 3](#).



VHA users can see the **Include Community Data** option, but it is not yet active.
VBA users do not have access to community data, and will not see the **Include Community Data** option.

Figure 3: Community Data Display Option

2.4. Logging Out of the Current JLV Session


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

Figure 4: JLV Log Out Icon





A JLV session will end automatically after thirty minutes of inactivity. Automatic termination of a session does not clear the last screen in use and display the **Login** page, but connectivity to, and the functionality of JLV is terminated. To re-open a JLV session, log in to JLV again.

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

3. The Elements and Functionality of JLV


3.1. The JLV Portal Pages

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

- The Patient Portal 
- The Provider Portal 

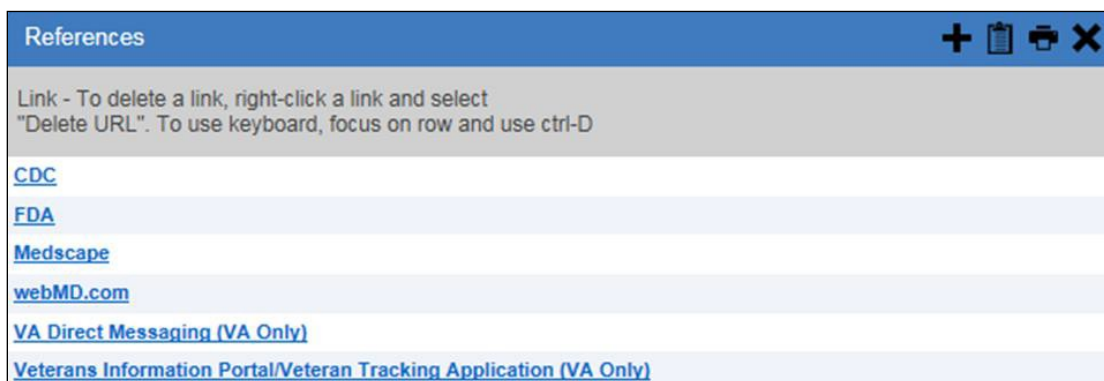
3.1.1. Default View

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


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

Delete a reference by right-clicking the link and selecting **Delete URL**. Users will not be able to delete reference links included in the default widget configuration.

Figure 5: References Widget



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

New JLV users will see a pre-configured, default widget layout on the Patient Portal  when JLV opens. The default layout includes the **Patient Demographics**, **Allergies**, **Problem List**, **Documents**, **Outpatient Medications**, and **Lab Results** widgets.



Users can configure the layout of widgets on the **Patient Portal** and create multiple widget

tabs, as described in [Section 3.2, Customizing JLV after Log In](#), and in [Section 4.1, Accessing and Opening Widgets](#). Customizations are saved to the user profile as set, and remain until manually changed.

3.1.2. System Menu

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





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

Figure 6: JLV Tools on the Portal Pages



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









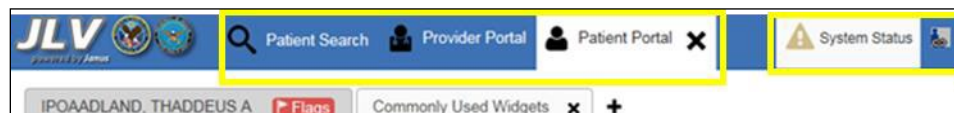
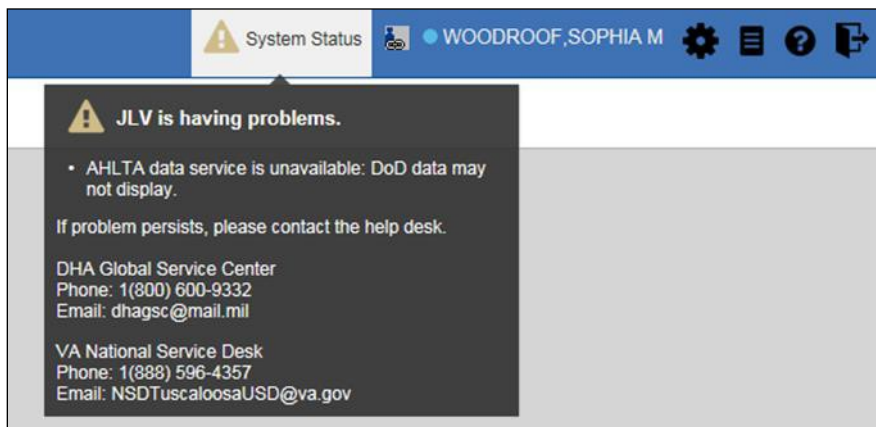
- Perform a Patient Search 
- Switch between the Patient Portal  and the Provider Portal 
- View the system status   
- View Context Management status  
- Open the widget tray **Open Widget Tray** ^ (bottom of the portal pages)

Figure 7: More JLV Functionality



The system status is displayed to the left of the user name. Hovering over **System Status** will provide additional information, as seen in [Figure 8](#).

Figure 8: System Status Details



3.1.3. Viewing System Status

System status updates are received from JLV's Quality of Service (QoS) Monitor, also called the Health Monitor. QoS monitors the status of services that JLV uses to connect to VA and DoD data sources, which include: Master Veteran Index (MVI), Patient Discovery Web Service (PDWS), Relay Service, VistA Data Service (VDS), and jMeadows Data Service.

JLV displays the system status on the **Login** page, below the user credential fields (highlighted in [Figure 9](#)), and at the top of the Portal Pages ([Figure 8](#)).




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



Figure 9: System Status on the JLV Login Page



3.1.4. Context Management

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

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

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

[Figure 10](#) shows the context indicator location on a JLV portal pages. In this example, context is suspended.


Figure 10: Context Indicator



3.1.4.1. Establishing Context

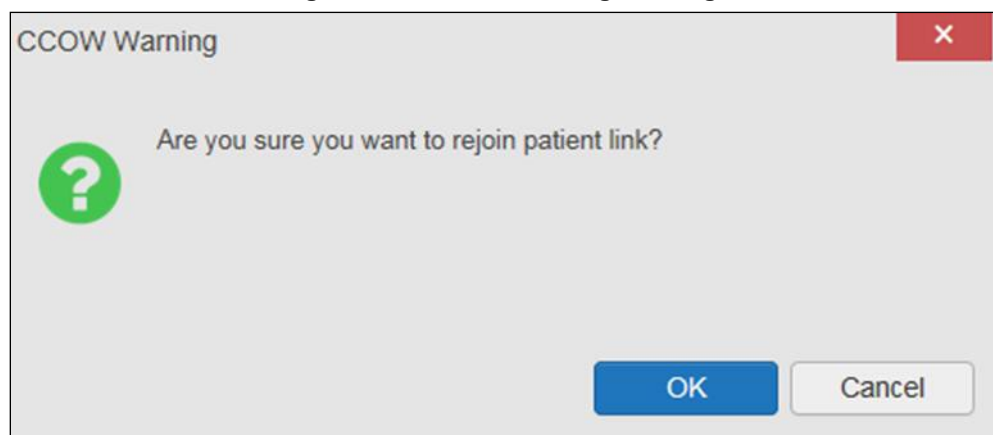
When context is suspended, it can be re-established manually.

To establish or re-establish context:

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

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


Figure 11: CCOW Warning Message



3.1.4.2. Suspending Context

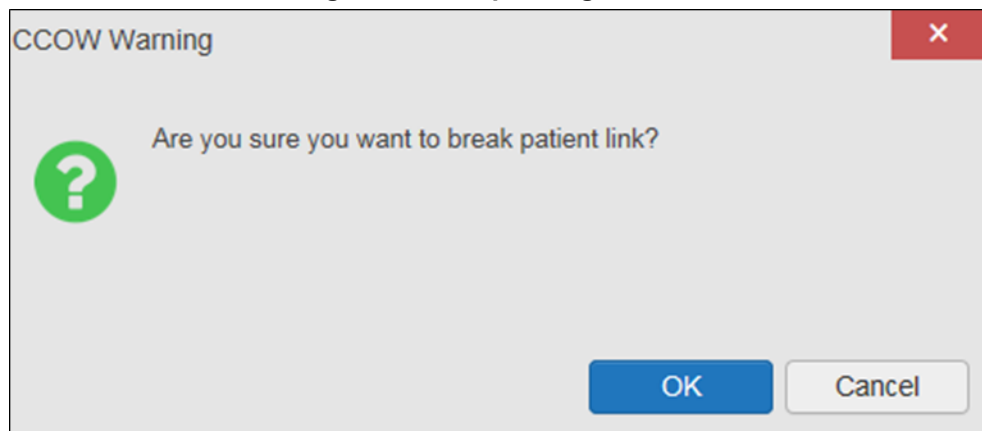
Context can be manually suspended.

To manually suspend context:

1. Click the **Context On** icon 
2. The CCOW warning message, *Are you sure you want to break patient link?* appears ([Figure 12](#))
3. Click **Yes** to continue

Once context is suspended, the **Context Suspended** icon  is displayed on the portal pages.

Figure 12: Suspending Context



3.1.4.3. Unable to Communicate with Vault


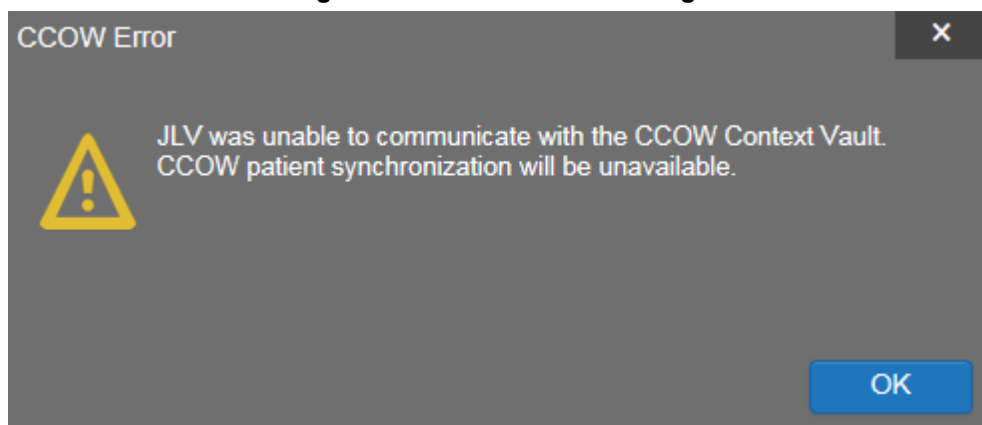
If JLV is unable to initiate context management upon log in, the user will see the CCOW Error message ([Figure 13](#)). Click **OK** to continue. The **Context Suspended** icon  is displayed on the portal pages.

Figure 13: CCOW Error Message



3.1.4.4. Context Synchronization Failure


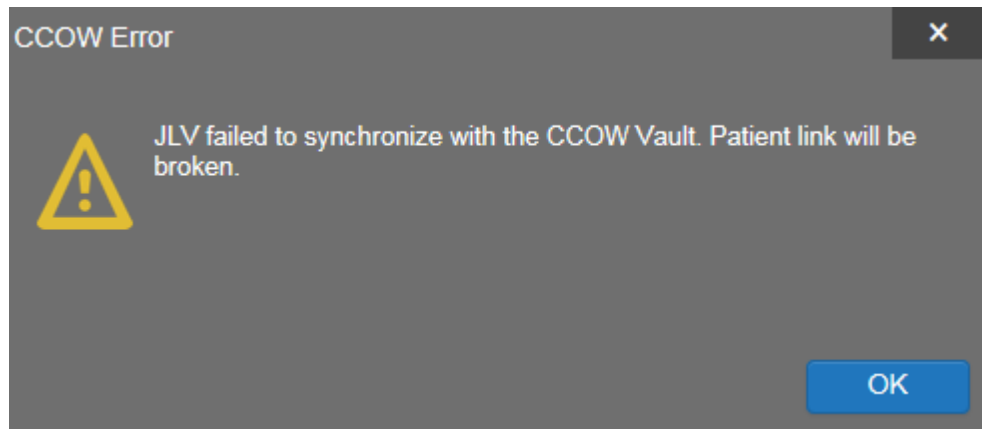
In the event that JLV is unable to re-establish context, a CCOW Error message is presented ([Figure 14](#)). This indicates context is suspended. Click **OK** to continue. The **Context Suspended** icon  is displayed on the portal pages.

Figure 14: Context Synchronization Failure



3.1.5. VistA Imaging Viewer

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



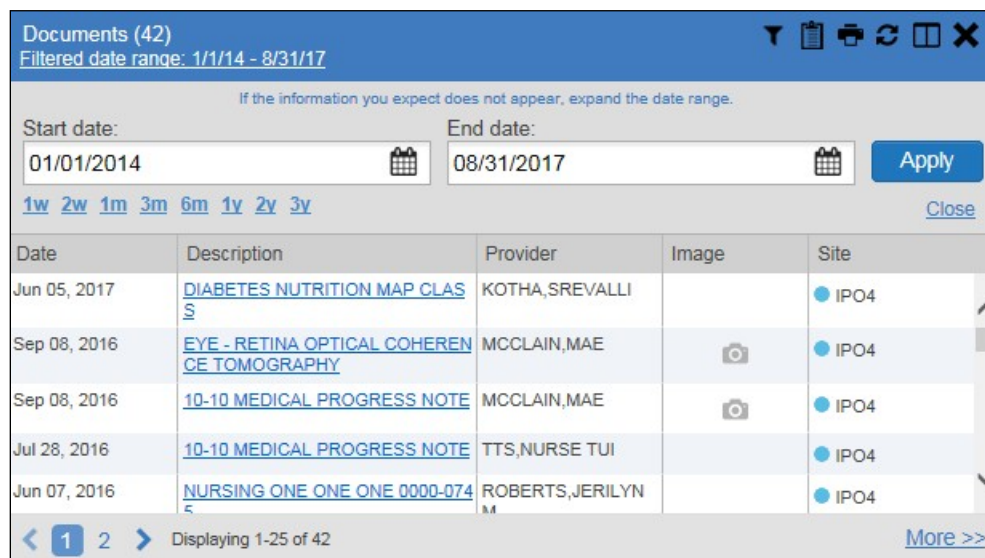
A **camera icon**  displayed in the **Image** column ([Figure 15](#)) of the **Documents**, **Outpatient Encounters**, **Procedures**, **Progress Notes**, and **Radiology Reports** widgets indicates that one or more images are associated with that record. Clicking the **camera icon**  within the widget opens the VistA Imaging Viewer in a standalone window, and displays the associated image.

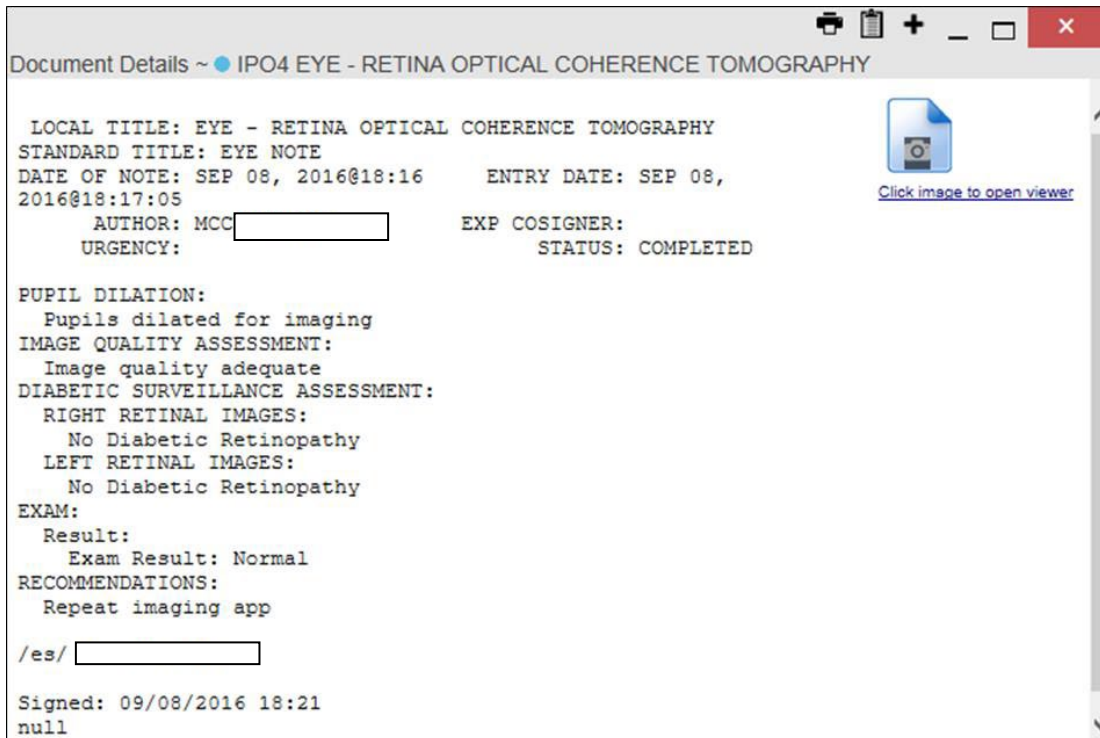
Figure 15: Camera Icon in the Image Column



If a record has one or more images associated with it, the **Details** view of the widget includes a display of a thumbnail in the top right corner of the window ([Figure 16](#)). Below the thumbnail, a

link that reads, **Click image to open viewer**, is also displayed. Clicking either the thumbnail or the link opens the VistA Imaging Viewer, and displays the associated image(s).

Figure 16: Thumbnail and Link in Details View



3.2. Customizing JLV

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

3.2.1. Setting the UI Theme

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

To set the UI theme within JLV:


1. Click the **cog wheel**  icon in the upper right corner of the portal pages ([Figure 6](#))
2. The **User Configuration** dialog box opens
3. Select the desired theme and click **Save**
4. After clicking **Save**, click **Yes** to reload the application and apply your theme choice
5. Alternatively, click **Cancel** to exit the dialog box and restore the previous theme

Figure 17: Blue (Default) UI Theme

The screenshot displays the JLV interface in the Blue (Default) UI Theme. The top navigation bar includes the JLV logo, Patient Search, Provider Portal, and Patient Portal links. The main content area is divided into several sections:

- Patient Profile:** Displays patient information for IPOADLAND, THADDEUS A., including address, SSN, age, DOB, race, gender, and insurance details.
- Documents (5):** A table listing documents with columns for Date, Description, Provider, Image, and Site. The table shows five documents, including "DIABETES NUTRITION MAP GLAS" and "FAMILY HISTORY OF GLAUCOMA".
- Appointments (1):** A table listing appointments with columns for Scheduled Date/Time, Clinic, Provider, and Site. It shows one appointment on Jun 05, 2017, at 11:14.
- Immunizations (20):** A table listing immunizations with columns for Vaccine Administered Date, Vaccine Administered Product Type, Adverse Vaccine Reaction, and Site. It shows 20 immunizations, including "PNEUMOCOCCAL CONJUGATE POLY" and "BPD".
- Community Health Summaries and Documents - VA (0):** A section showing no data for community health summaries.
- MHS GENESIS (0):** A section showing no data for MHS GENESIS.

Figure 18: Green UI Theme

The screenshot displays the JLV interface in the Green UI Theme. The layout and data are identical to Figure 17, but the color scheme is changed to green. The top navigation bar is green, and the background of the content area is a light green. The patient profile, documents, appointments, immunizations, and community health summaries sections all maintain their structure and data.

Figure 19: Dark Gray UI Theme

Patient Information:

- 4206 NORTH HAMPTON CT
FORT COLLINS, COLORADO 80525
- SSN: 101936540
- Age: 72
- DOB: 23 Oct 1944
- Race: White
- Gender: M
- SC Percent: 40%
- PCM Name: SCARF, GONZALO D
- PCM Date: Dec 02, 2010
- PCM Team: TEAM PFC 3

Documents (5):

Date	Description	Provider	Image	Site
Jun 05, 2017	DIABETES NUTRITION MAP CLASS	KOTHA, SREVALU		IP04
Jun 05, 2017 11:14	FAMILY HISTORY OF GLAUCOMA	KOTHA, SREVALU		IP04
Jun 23, 2017	ECHOGRAM CHEST B-SCAN			IP04
Jul 31, 2017	DENTAL	PETERSON, BILL		IP04
Jul 31, 2017	DENTAL	PETERSON, BILL		IP04

Appointments (1):

Scheduled Date/Time	Clinic	Provider	Site
Jun 05, 2017 11:14	OHY ANTIODAG	KOTHA, SREVALU	IP04

Immunizations (20):

Vaccine Administered Date	Vaccine Administered Product Type	Adverse Vaccine Reaction	Site
Jul 28, 2016	PNEUMOCOCCAL CONJUGATE POLY	FEVER	IP04
Jun 07, 2016	RSV		IP04
Jun 06, 2016	RSV		IP04
Jun 10, 2015	CANDIDA		IP04
Jun 10, 2015	HEP B ADULT		IP04
May 31, 2014	INFLUENZA UNSPECIFIED FOR VACCINATION	OTHER	IP05

Figure 20: Gray UI Theme

Patient Information:

- 4206 NORTH HAMPTON CT
FORT COLLINS, COLORADO 80525
- SSN: 101936540
- Age: 72
- DOB: 23 Oct 1944
- Race: White
- Gender: M
- SC Percent: 40%
- PCM Name: SCARF, GONZALO D
- PCM Date: Dec 02, 2010
- PCM Team: TEAM PFC 3

Documents (5):

Date	Description	Provider	Image	Site
Jun 05, 2017	DIABETES NUTRITION MAP CLASS	KOTHA, SREVALU		IP04
Jun 05, 2017 11:14	FAMILY HISTORY OF GLAUCOMA	KOTHA, SREVALU		IP04
Jun 23, 2017	ECHOGRAM CHEST B-SCAN			IP04
Jul 31, 2017	DENTAL	PETERSON, BILL		IP04
Jul 31, 2017	DENTAL	PETERSON, BILL		IP04

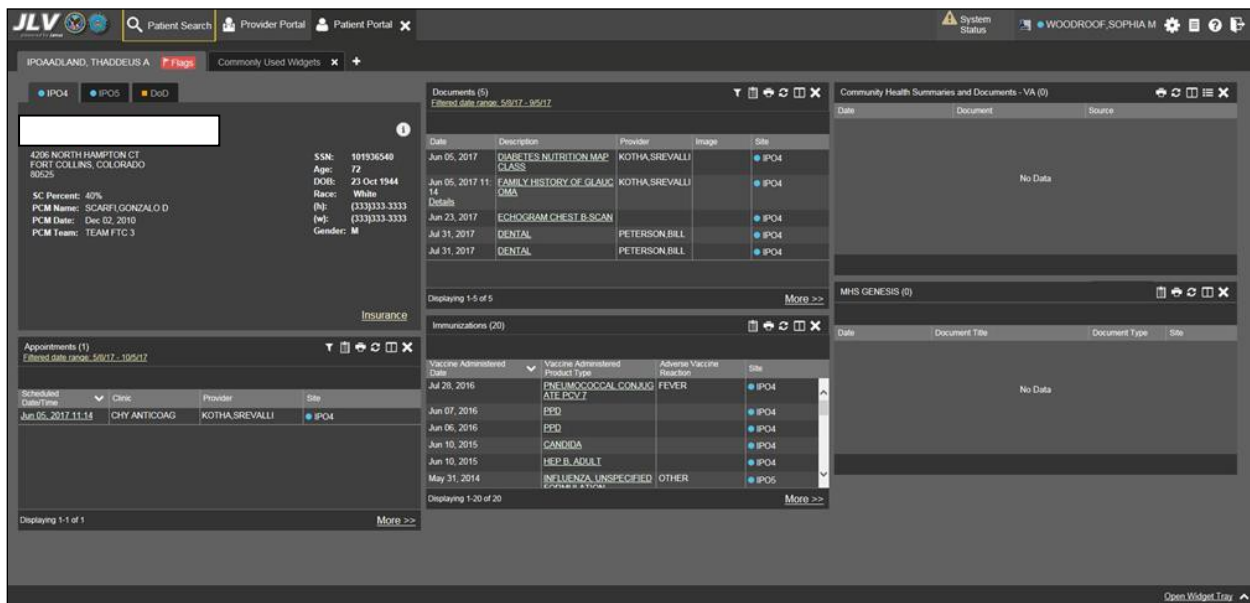
Appointments (1):

Scheduled Date/Time	Clinic	Provider	Site
Jun 05, 2017 11:14	OHY ANTIODAG	KOTHA, SREVALU	IP04

Immunizations (20):

Vaccine Administered Date	Vaccine Administered Product Type	Adverse Vaccine Reaction	Site
Jul 28, 2016	PNEUMOCOCCAL CONJUGATE POLY	FEVER	IP04
Jun 07, 2016	RSV		IP04
Jun 06, 2016	RSV		IP04
Jun 10, 2015	CANDIDA		IP04
Jun 10, 2015	HEP B ADULT		IP04
May 31, 2014	INFLUENZA UNSPECIFIED FOR VACCINATION	OTHER	IP05

Figure 21: Accessible (508 Compliant) UI Theme



3.2.2. Using the Accessible Theme's Functionality

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



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

3.2.2.1. Keyboard Focus and Screen Navigation

Keyboard focus is the highlighting of screen elements that enables interaction with, and navigation of, JLV through the keyboard and keystrokes. The on-screen item in focus is outlined. JLV uses a gold outline as a visual indicator of the element with keyboard focus.

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 **Cog Wheel**  icon is in focus opens the **User Configuration** dialog box. Using the arrow keys or the **Tab** key moves between keyboard focus items to navigate through screen elements. A complete list of accessible keystrokes is provided in [Table 3](#).

Table 3: Accessible Theme Keyboard Shortcuts

Keystroke	Description
Application & Portal Navigation	
ENTER	Press to transfer keyboard focus to the highlighted widget
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 or widget
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 + P	Press to bring focus to the first tab in the active portal
Ctrl + R	When working with Report Builder, place keyboard focus on a record in a widget and press Ctrl + R to add the record to the Report Builder pane
Tab Panels	
Arrow Keys	Use the left and right arrow keys to change tab panels To add a tab panel, press the right arrow key until the last tab (labeled with a plus sign) is selected. A dialog box will prompt for the new tab name. To close a tab, focus on the tab panel and press Ctrl + X
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	
SHIFT + (Number position)	To add a widget from the widget tray using keystrokes: 1. Determine which column (1, 2, or 3) in which to place the widget 2. Focus the desired widget icon in the widget tray and press the SHIFT key, along with the 1, 2, or 3 key, depending on the column chosen

3.2.2.2. Accessible Theme Screen Navigation

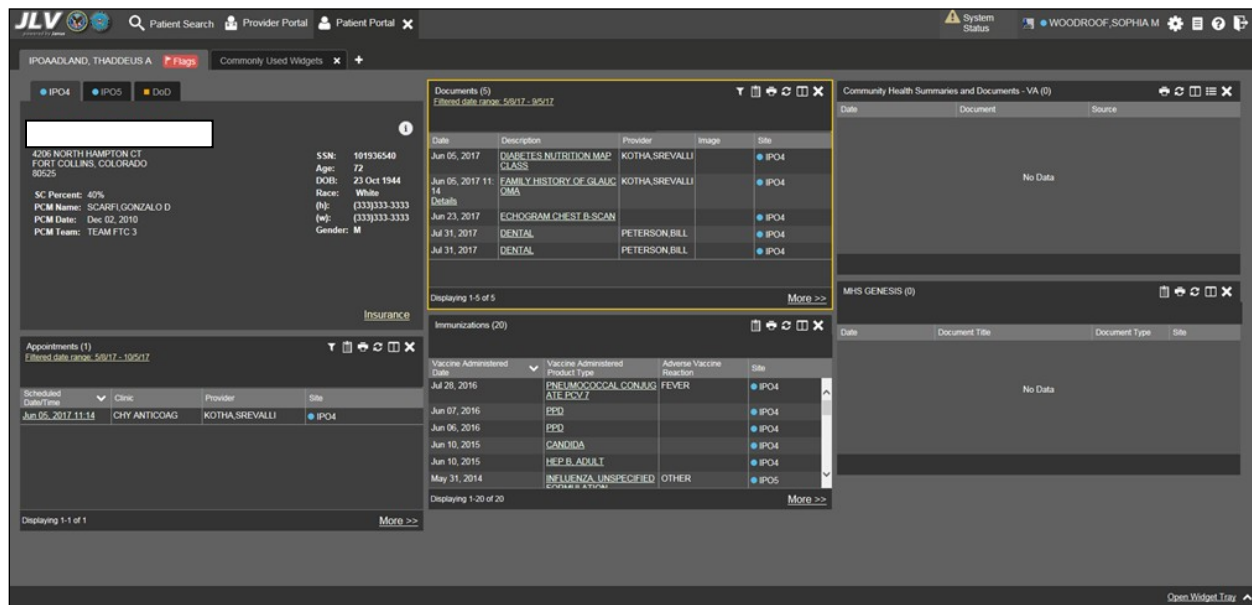
An element with keyboard focus is the starting point for screen navigation. Pressing the **Enter** key when a screen element or icon has keyboard focus mimics a mouse click.

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



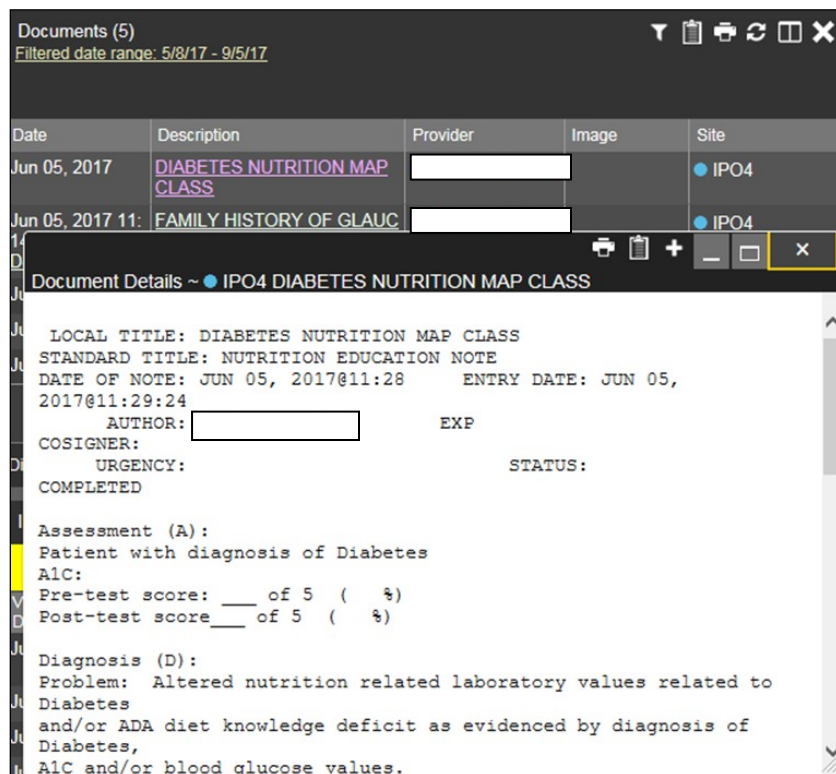
To view hover text where available, focus on the element within the widget that has hover text. After a small delay, the text will appear as if the user hovered over the element with a mouse cursor.

Figure 22: Navigation Using Elements with Keyboard Focus



In [Figure 23](#), the **Document** details window has keyboard focus. Move through the toolbar buttons by using the arrow keys, or by pressing **Tab**. Move to **Close (X)** and press **Enter** to close the details window. After closing the window, keyboard focus returns to the last element that had keyboard focus prior to opening the window.

Figure 23: Document Details with Keyboard Focus



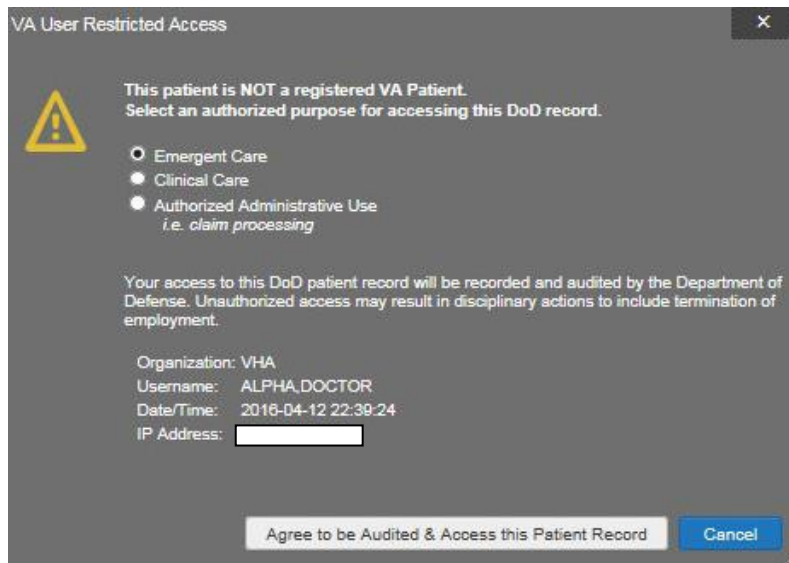
3.3. User-Restricted Access to Patient Data

3.3.1. VHA Users Viewing DoD-only Patients

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

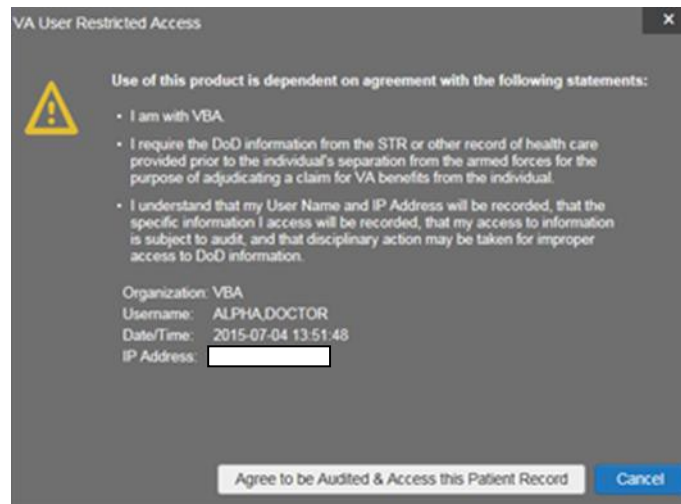


3.3.2. VBA Users Viewing Patients with DoD Data

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

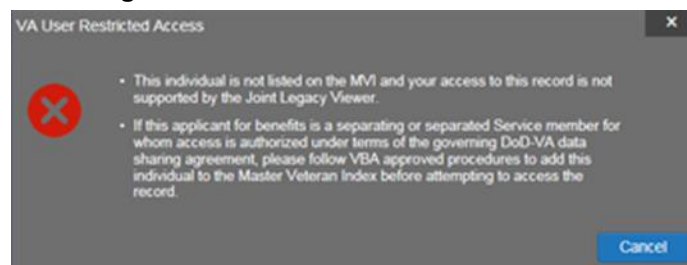
- **Patient registered in MVI:** VBA users are permitted to view the records of a patient who is registered in MVI, but the VA requires that these actions be audited. After performing a patient search and selecting a patient from the search results, a VBA user will see the audit notification ([Figure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

Figure 25: VBA User Audit Notification



- **Patient not registered in MVI:** VBA users are not permitted to access the records of a patient who is not registered in MVI. After performing a patient search and selecting a patient from the search results, a VBA user will see the restricted access notification ([Figure 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 outpatient encounters, progress notes, or labs results records. For each attempt to access sensitive data, JLV records the user's name, organization, Social Security Number (SSN)/EDIPI (for DoD users), PIV (for VA users), location, patient identifiers (patient last name, first name, middle initial (MI), SSN/EDIPI (DoD only), MVI (VA only), and date of birth (DOB)), data accessed, date and time, and reason for access.



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

JLV notifies users before they are audited. The message is triggered when the user clicks a masked record that is marked **** Sensitive ****. An example of a masked record displayed in a widget and the audit notification are depicted in [Figure 27](#).

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

Figure 27: DoD Sensitive Record and Audit Dialog Box

DoD Sensitive Record

This record is marked sensitive and should only be viewed if necessary, as per the HIPAA principle of minimum use. Select an authorized purpose for accessing this record.

☒ Emergent Care
☐ Clinical Care
☐ Authorized Administrative Use
i.e. claim processing

You have requested to view sensitive data. This usage is subject to audit. Do you wish to proceed?

Organization: VA
 Username:
 Date/Time: 2017-09-05 16:43:12
 IP Address:

Collection Date	Lab Test
Oct 08, 2013 13:20	ABO Group+Rh Type
Oct 08, 2013 13:19	Acid Fast Bacilli Cultur
Oct 08, 2013 13:21	5-Hydroxyindoleacetat
Oct 08, 2013 13:21	5-Hydroxyindoleacetat
Oct 08, 2013 13:20	17-Hydroxyprogesterone
Oct 08, 2013 13:20	Alpha-1-Antitrypsin
Oct 08, 2013 13:20	Alpha-1-Antitrypsin Ph
Oct 08, 2013 13:18	Acetylcholine Recepto
Oct 08, 2013 13:21	Hemoglobin
Oct 08, 2013 13:19	Alpha-1-Antitrypsin
Oct 08, 2013 13:19	** Sensitive **
Oct 08, 2013 13:18	Alpha-1-Fetoprotein T
Oct 08, 2013 13:18	Acetaminophen

Displaying 26-50 of 65

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

3.4.1. PDWS Search Rules and Supported Searches

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

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

The following search combinations are supported when PDWS is utilized:

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

3.4.2. MVI Search Guidelines

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

3.4.3. Patient Search Using DoD ID

To perform a patient search using the DoD ID ([Figure 28](#)):


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

Figure 28: DoD ID (EDIPI) Search

Patient Search

DoD ID: 1606681433

OR

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

* Last Name: First Name:


[<< Show Advanced Search Options](#)

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

Search


Recently Viewed Patients Search Results

Name	SSN	Date of Birth	Gender
	101936540	19441023	M

3. Click **Search**. 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. The Name, SSN, DOB, and Gender columns in the results list provide information to assist with patient identification
5. After selecting a patient, the **Patient Portal**  opens and displays the selected patient's data

3.4.4. Patient Search Using SSN

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

1. Click the **Patient Search** icon  at the top of the portal pages. The **Patient Search** dialog box opens
2. Enter the patient's full, nine-digit SSN in the **SSN** field ([Figure 29](#))



NOTE: When searching by SSN, either the last name or the DOB *must* be entered to perform the search.

Figure 29: SSN Search

Patient Search

DoD ID:

OR

SSN: OR Sponsor SSN:

* Last Name: First Name:


[<< Show Advanced Search Options](#)

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

Search

Recently Viewed Patients | **Search Results**


Name	SSN	Date of Birth	Gender
<input type="text"/>	101936540	19441023	M

3. Click **Search**. If the required patient identifiers are not provided, hover text appears, indicating the information necessary to complete the patient search. If a match of patient names cannot be made, enter additional identifiers to refine the search
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. The Name, SSN, DOB, and Gender columns in the results list provide information to assist with patient identification
6. After selecting a patient, the **Patient Portal**  opens and displays the selected patient's data

3.4.5. Advanced Patient Search Options

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

To search using advanced patient search options:

1. Click the **Patient Search** icon  at the top of the portal pages. The **Patient Search** dialog box opens

- Click the [<<Show Advanced Search Options](#) link under the *Last Name field (seen in [Figure 29](#))
- Enter the patient identifiers in the appropriate search fields, as desired. Advanced search option fields include *DOB, MI, Gender, Address, State, City, Zip, and Telephone

Figure 30: Advanced Search Options

The screenshot shows a 'Patient Search' dialog box with a red close button in the top right corner. The form contains several input fields and a search button. At the top, there is a 'DoD ID' field with a placeholder 'Please Enter Patient DoD ID'. Below this is an 'OR' separator. The next row has 'SSN' and 'Sponsor SSN' fields, both with placeholders 'Please Enter Patient SSN' and 'Please Enter Sponsor SSN' respectively. Below these are 'Last Name' and 'First Name' fields. A link '>> Hide Advanced Search Options' is positioned below the name fields. The next row contains '* DOB' (with a calendar icon), 'MI', and 'Gender' (a dropdown menu). The following row has 'Address', 'State' (a dropdown menu), and 'Zip'. The final row has 'City' and 'Telephone'. A blue 'Search' button is located to the right of the 'Telephone' field. Below the search fields, a note states: '* When searching by SSN, Last Name or DOB is required.' At the bottom, there are two tabs: 'Recently Viewed Patients' and 'Search Results'. The 'Search Results' tab is active, showing a table with columns: Name, SSN, Date of Birth, and Gender. The table body is currently empty.

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

3.4.6. Family Member Search

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

To perform a family member search:


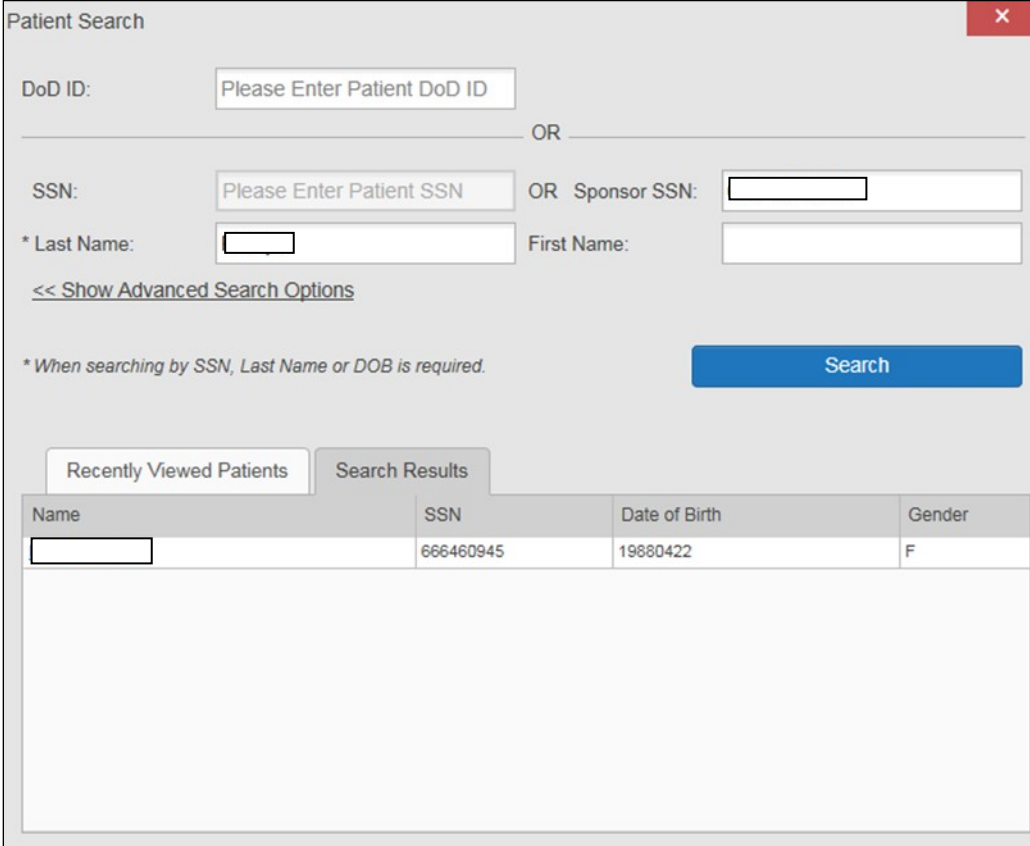
1. Click the **Patient Search** icon  at the top of the portal pages. The **Patient Search** dialog box opens
2. Enter the SSN in the **Sponsor SSN** field. The **Last Name** or **DOB** of the patient must also be entered in the appropriate fields ([Figure 31](#))
3. Click **Search**. If the required 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 31](#))

Figure 31: Sponsor SSN Search



Patient Search

DoD ID:

OR

SSN: OR Sponsor SSN:

* Last Name: First Name:

[<< Show Advanced Search Options](#)

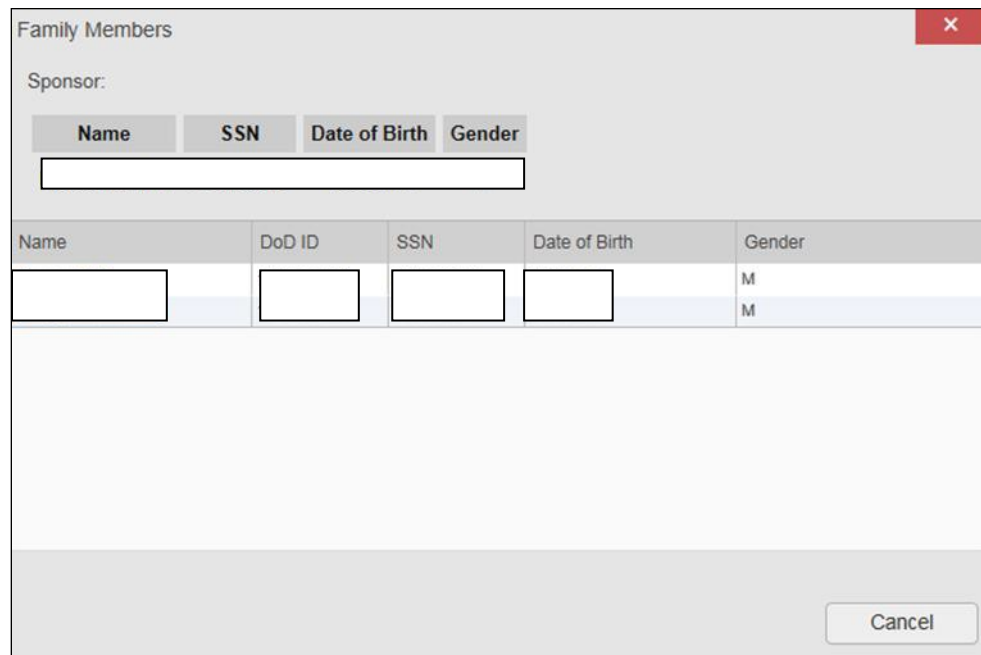
** When searching by SSN, Last Name or DOB is required.*

Name	SSN	Date of Birth	Gender
<input type="text"/>	666460945	19880422	F

5. Click a name in the **Search Results** list. The **Family Members** dialog opens ([Figure 32](#)). 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

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

Figure 32: Family Members Dialog Box



Family Members

Sponsor:

Name	SSN	Date of Birth	Gender

Name	DoD ID	SSN	Date of Birth	Gender
				M
				M

Cancel

3.4.7. Recently Viewed Patients List

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



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

To open the list of recently viewed patients:



- Click the **Patient Search** icon  at the top of the portal pages. The **Patient Search** dialog box opens
- Click the **Recently Viewed Patients** tab in the lower third of the **Patient Search** dialog box
- A list of recently viewed patients is displayed ([Figure 33](#)). The Name, DoD ID, SSN, DOB, and Gender columns in the results list provide information to assist with patient identification
- Click a patient's name in the **Recently Viewed Patients** list to open the associated record
- After selecting a patient, the **Patient Portal**  opens and displays the selected patient's data

Figure 33: Recently Viewed Patients List

Patient Search

DoD ID:

OR

SSN:

Please Enter Patient SSN

OR

Sponsor SSN:

Please Enter Sponsor SSN

* Last Name:

First Name:

[<< Show Advanced Search Options](#)

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

Search

Recently Viewed Patients

Search Results

Name	DoD ID	SSN	Date of Birth	Gender
				M
				M
				M

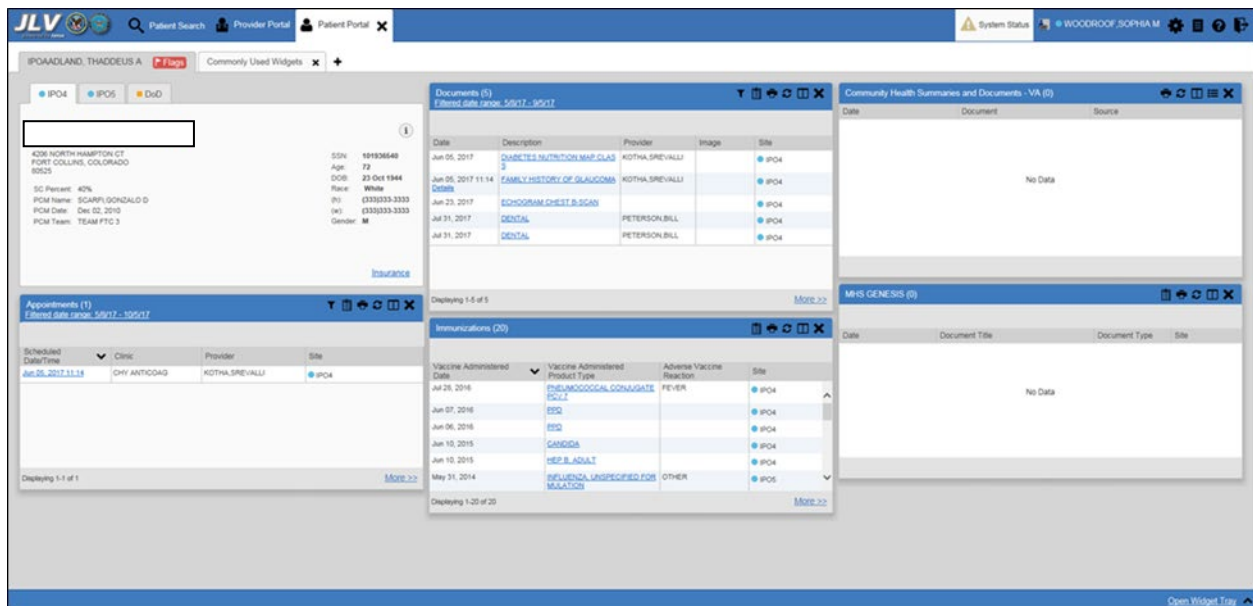
4. Widgets

Widgets are elements on the JLV portal pages that display data specific to a clinical domain. By default, widgets are displayed in minimized view on the portal pages ([Figure 34](#)), but can be expanded to view additional details. The list of available widgets is provided in a horizontal tray at the bottom of the page.



Widgets may take anywhere between 3 seconds to 10 seconds to load.

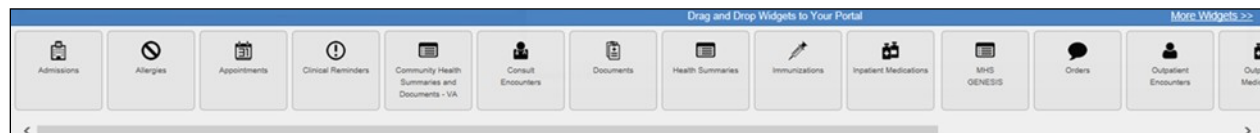
Figure 34: Widgets on the Patient Portal



4.1. Accessing and Opening Widgets

Widgets can be opened, rearranged, and closed. All available widgets are displayed in the widget tray, at the bottom of the portal pages ([Figure 35](#)).

Figure 35: Widget Tray



To place a widget on the Patient Portal:

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-
3. Click the **More Widgets >>** link to scroll through the list of widgets

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




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

4.2. Widget Navigation and Display Options

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

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

Table 4: Navigation Icons and Actions














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

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

4.3. Widget Toolbars

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

Table 5: Widget Toolbar Icons

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

Icon	Name	Function
		Include Community Data is enabled. (The Community Data option will be available in a future release.)

4.4. Minimized vs. Expanded Widget View

Each widget can be displayed in either a minimized (default) or an expanded view. Minimized view displays a short list of the available patient data for a clinical domain, arranged in reverse chronological order. Expanded view provides a longer list of similarly arranged patient data. When the expanded view of a widget is launched, it opens in a new, separate window.



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

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


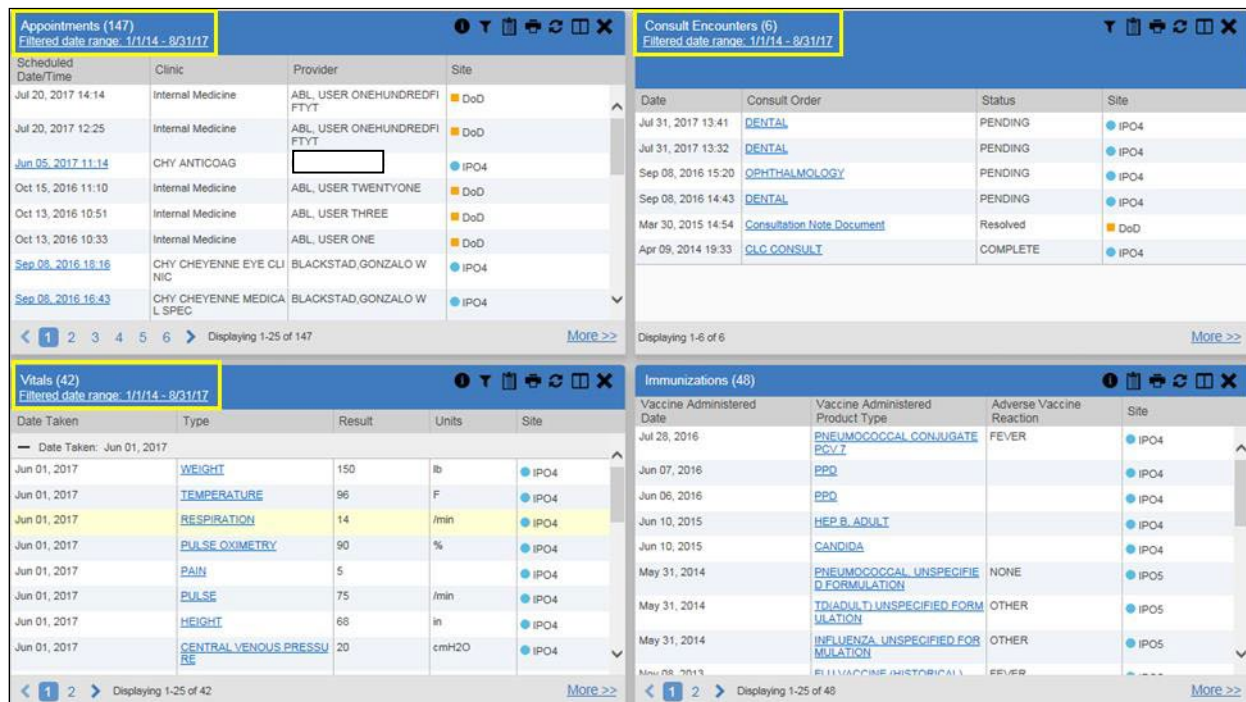
Patient data displayed within a widget can be filtered by date range. If a date range filter is applied, the selected range is indicated in the widget header, below the title. Click the **Configure Filter** icon  or the **Filtered Date Range** link on the widget toolbar to change the date range of the data displayed ([Figure 36](#)).

Figure 36: Date Range Filters Applied



The screenshot displays four widget panels, each with a title bar indicating a date range filter of 1/1/14 - 8/31/17. The panels are:

- Appointments (147)**: Shows a list of appointments with columns for Scheduled Date/Time, Clinic, Provider, and Site. The date range filter is highlighted in the title bar.
- Consult Encounters (6)**: Shows a list of consult encounters with columns for Date, Consult Order, Status, and Site. The date range filter is highlighted in the title bar.
- Vitals (42)**: Shows a list of vital signs with columns for Date Taken, Type, Result, Units, and Site. The date range filter is highlighted in the title bar.
- Immunizations (48)**: Shows a list of immunizations with columns for Vaccine Administered Date, Vaccine Administered Product Type, Adverse Vaccine Reaction, and Site. The date range filter is highlighted in the title bar.

Each panel includes a toolbar with icons for filtering, sorting, and other actions, and a 'More >>' link at the bottom to expand the view.

4.4.1. Date Range Filters

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



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

4.4.1.1. Quick Date Range Filter

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

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



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

[Figure 37](#) highlights the **Quick Date Range** filter options in the expanded view of the **Documents** widget.

Figure 37: Quick Date Range Filter Options

Documents (5)
Filtered date range: 5/8/17 - 9/5/17

If the information you expect does not appear, expand the date range. [Close Filter](#)


Start date: 05/08/2017 End date: 09/05/2017 [Apply](#) **1w** 2w 1m 3m 6m 1y 2y 3y

Filter by Description Filter by Standardized Description Filter by Provider Specialty Filter by Location
Filter by Source System Filter by Site

Date	Description	Standardized Description	Provider	Provider...	Location	Status	Im...	Source System	Site
Jul 31, 2017	DENTAL			Allopathic and Osteopathic Physicians		PENDING		VistA	4 IPO
Jul 31, 2017	DENTAL			Allopathic and Osteopathic Physicians		PENDING		VistA	4 IPO
Jun 23, 2017	ECHOGRAM CHEST B-SCAN	ULTRASOUND, CHEST (INCLUDES MEDIASTINUM), REAL TIME WITH IMAGE DOCUMENTATION						VistA	4 IPO
Jun 05, 2017	DIABETES NUTRITION MAP CLASS	Education note		Allopathic and Osteopathic Physicians	CHYSQA260			VistA	4 IPO
Jun 05, 2017 11:14	FAMILY HISTORY OF GLAUCOMA			Allopathic and Osteopathic Physicians	CHY ANTICOAG			VistA	4 IPO

Displaying 1-5 of 5 [Show All](#)

4.4.1.2. Start and End Date Filter

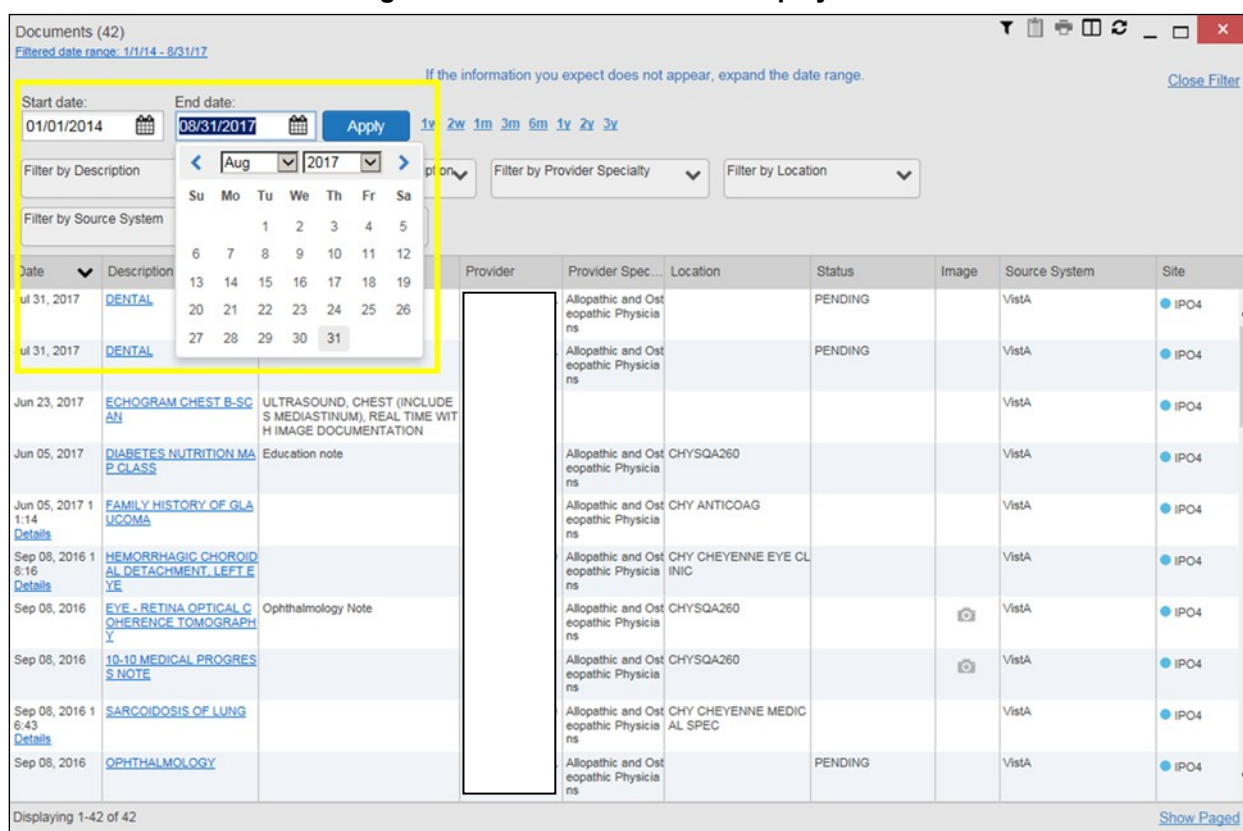
Use the **Start Date** and **End Date** filter to display data for a specific time range. The start and end date fields are available at the top of multiple widgets in expanded view, or by clicking the **Configure Filter** icon  in minimized view.



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

[Figure 38](#) provides an example of the start and end date filter fields in the expanded view of the **Radiology Reports** widget.

Figure 38: Start and End Date Display Filter





Documents (42)
Filtered date range: 1/1/14 - 8/31/17

If the information you expect does not appear, expand the date range.

Start date: 01/01/2014 End date: 08/31/2017 Apply



Filter by Description Filter by Provider Specialty Filter by Location

1y 2w 1m 3m 6m 1y 2y 3y

Date	Description	Provider	Provider Spec...	Location	Status	Image	Source System	Site
Jul 31, 2017	DENTAL		Allopathic and Osteopathic Physicians		PENDING		VistA	IPO4
Jul 31, 2017	DENTAL		Allopathic and Osteopathic Physicians		PENDING		VistA	IPO4
Jun 23, 2017	ECHOGRAM CHEST B-SCAL						VistA	IPO4
Jun 05, 2017	DIABETES NUTRITION MANAGEMENT CLASS		Allopathic and Osteopathic Physicians	CHYSQA260			VistA	IPO4
Jun 05, 2017 1:14	FAMILY HISTORY OF GLAUCOMA		Allopathic and Osteopathic Physicians	CHY ANTICOAG			VistA	IPO4
Sep 08, 2016 8:16	HEMORRHAGIC CHOROIDAL DETACHMENT LEFT EYE		Allopathic and Osteopathic Physicians	CHY CHEYENNE EYE CLINIC			VistA	IPO4
Sep 08, 2016	EYE - RETINA OPTICAL COHERENCE TOMOGRAPHY		Allopathic and Osteopathic Physicians	CHYSQA260			VistA	IPO4
Sep 08, 2016	10-10 MEDICAL PROGRESS NOTE		Allopathic and Osteopathic Physicians	CHYSQA260			VistA	IPO4
Sep 08, 2016 6:43	SARCOIDOSIS OF LUNG		Allopathic and Osteopathic Physicians	CHY CHEYENNE MEDICAL SPEC			VistA	IPO4
Sep 08, 2016	OPHTHALMOLOGY		Allopathic and Osteopathic Physicians		PENDING		VistA	IPO4

Displaying 1-42 of 42 Show Paged



To set a custom date range:

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

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

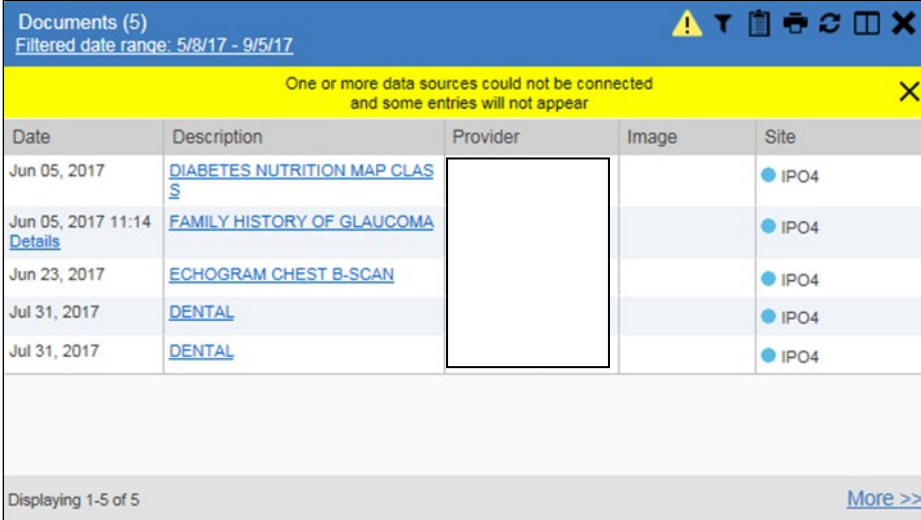
4.5. Viewing Interface Status

Interface status updates for clinical domains are not the same as System Status messages displayed in the top right corner of the portal pages. See [Section 3.1.3, Viewing System Status](#), for more information.

Interface status updates are available for each widget except **Clinical Reminders**, and can be accessed through the widget's toolbar. An icon on the toolbar provides a status indicator for VA, DoD, and community partner data sources. There are two status conditions:  all sources are connected (available), or  one or more sources are not connected/unavailable. Clicking either icon opens the interface status for VA, DoD, and community partner sources in a standalone window. Entries for the status of DoD sources are derived from responses received from Data Exchange Services (DES). Interface status notifications accessed from the widget show connection status at the domain level.

[Figure 39](#) shows a status message banner displayed in the **Documents** widget. The banner can be closed by clicking the **Close** icon **X** to the right of the status message. This action hides the banner during the current JLV session, until the widget is closed. Re-opening the widget restores the banner display, if the problem persists.

Figure 39: Interface Status Banner



Date	Description	Provider	Image	Site
Jun 05, 2017	DIABETES NUTRITION MAP CLAS S			● IPO4
Jun 05, 2017 11:14	FAMILY HISTORY OF GLAUCOMA Details			● IPO4
Jun 23, 2017	ECHOGRAM CHEST B-SCAN			● IPO4
Jul 31, 2017	DENTAL			● IPO4
Jul 31, 2017	DENTAL			● IPO4

Displaying 1-5 of 5 [More >>](#)

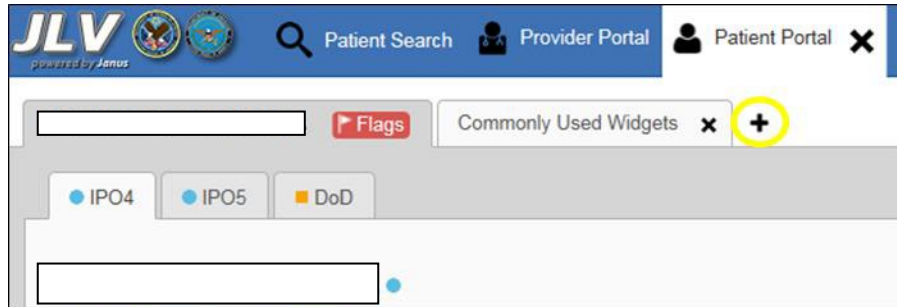
4.6. Displaying Widgets on Custom Tabs

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

To create a custom tab:

1. Click the plus sign + beside the existing tabs on the portal page ([Figure 40](#)). The **Add Tab** dialog box opens
2. Type the name of the new tab in the **Add Tab** dialog box and click **OK**

Figure 40: Add Custom Tab Icon




3. Click the **Open Widget Tray** link within the new tab space to display all available widgets
4. Click, hold, and drag each of the desired widgets to the screen


i Tab configurations remain as set, until manually changed.

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

4.7. Refreshing Data in a Widget

The data displayed in a widget can be refreshed by clicking the **Refresh** icon . This action refreshes the widget's display.

i When the option to **Include Community Data** is enabled, clicking the **Refresh** icon also triggers a refresh of the VA VLER-enabled widgets' data.

A widget will display the **VLER Refresh** icon  if the widget supports community partner data, and the **Include Community Data** option is enabled. Clicking the **VLER Refresh** icon triggers two refresh actions: JLV sends a new query to VLER sources for community partner data, then refreshes DoD and VA data in open widgets with data JLV has stored in a cache. Clicking **VLER Refresh** in one widget refreshes all other open, VLER-enabled widgets.

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

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

4.8. Using Report Builder

Report Builder provides the ability to build custom reports by selecting patient records, or a combination of supported documents and record details. The information selected for the custom report is exported to a printable file in Portable Document Format (PDF).



As noted in [Section 1.3, System Requirements](#), it is recommended that the latest version of the Adobe Reader be installed on the system used to access JLV.

Reports can be built using patient records, and/or documents from either the minimized or expanded view of a supported widget. The **Report Builder** feature can be accessed from the toolbar at the top right corner of the **Patient Portal**.

To create a custom report:


1. Click the **Report Builder** icon  ([Figure 41](#)). The **Report Builder** pane opens on the **Patient Portal** ([Figure 42](#))

Figure 41: Report Builder Icon




2. Select records to add to the report:
 - Any record or demographics data within a widget can be added by right-clicking the entry in an open widget and selecting **Add Record to Report** ([Figure 42](#))
 - Click **Add to Report** within any **Demographics** tab to add demographics data. Demographics information will appear at the top of the report by default
 - If the desired record has a **Details** or **Notes** view, click the **Add Record** icon  on the toolbar of the open **Details** or **Notes** window to add the additional record information
 - Some DoD documents can only be added to **Report Builder** by opening the **Details** or **Notes** view of the document
 - Some DoD documents do not have a **Details** or **Notes** view, but clicking on their name in the list of documents will present the dialog box seen in [Figure 43](#)
 - Some DoD notes cannot be added to **Report Builder**. If a note cannot be added, there will not be an option to add the record to the report on a right-click

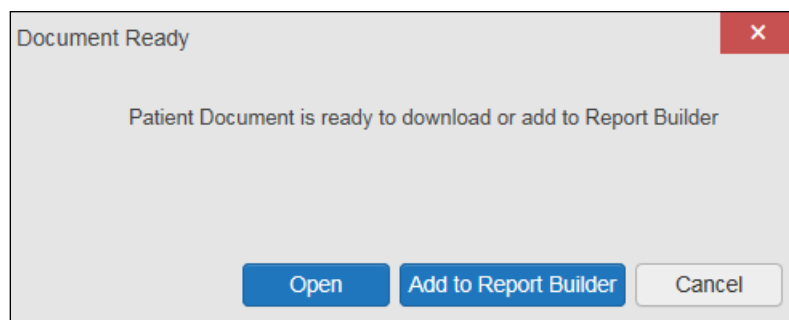
Figure 42: Report Builder Pane and Add Record to Report Option

The screenshot shows the JLV Patient Portal interface. On the left, the 'Report Builder' pane is open, displaying patient information (SSN: 101936540, Age: 72, DOB: 23 Oct 1944, Race: White, etc.) and a 'Selected Items' section with the message 'No records added to report.' Below this are buttons for 'Clear Selected Record', 'Clear All', and 'Build'. A 'Preview of Record' section is also visible. On the right, a list of documents is shown, filtered by date range 5/8/17 - 9/5/17. The documents include 'NEURAL', 'ECHOGRAM CHEST B-SCAN', 'DIABETES NUTRITION MAP CLAS', and 'FAMILY HISTORY OF GLAUCOMA'. A yellow box highlights the 'Add Record to Report' button next to the 'ECHOGRAM CHEST B-SCAN' document. Below the documents, there is a section for 'Immunizations (20)' with a table showing vaccine administration dates, product types, adverse reactions, and sites.

Date	Description	Provider	Image	Site
Jul 31, 2017	NEURAL			• IPO4
Jul 31, 2017	ECHOGRAM CHEST B-SCAN			• IPO4
Jun 23, 2017	ECHOGRAM CHEST B-SCAN			• IPO4
Jun 05, 2017	DIABETES NUTRITION MAP CLAS			• IPO4
Jun 05, 2017 11:14	FAMILY HISTORY OF GLAUCOMA			• IPO4

Vaccine Administered Date	Vaccine Administered Product Type	Adverse Vaccine Reaction	Site
Jul 28, 2016	PNEUMOCOCCAL CONJUGATE PCV13	FEVER	• IPO4
Jun 07, 2016	PPD		• IPO4
Jun 06, 2016	PPD		• IPO4
Jun 10, 2015	CANDIDA		• IPO4
Jun 10, 2015	HEP B ADULT		• IPO4
May 31, 2014	INFLUENZA UNSPECIFIED FOR MULATION	OTHER	• IPO5
May 31, 2014	TD(ADULT) UNSPECIFIED FORM ULATION	OTHER	• IPO5

Figure 43: Document Ready Dialog Box



3. The selected records appear in the **Report Builder** window
4. Use the navigation arrows to the right of the listed records ([Figure 44](#)) to arrange the records in the desired order in the generated report. Records can be removed by clicking **Clear Selected Record** or **Clear All**

Figure 44: Report Builder Tools

The screenshot shows the 'Report Builder' window. At the top, a blue header bar contains the title 'Report Builder' and navigation icons. Below the header, a blue instruction box states: 'To build a report, right-click an entry in the patient's record and select Add Record to Report.'

The main area is divided into two sections. The top section, 'Selected Items', contains a table with two columns: 'Selected Items' and 'Status'. The table lists four items, all with a status of 'Added':

Selected Items	Status
Patient Demographic ● IPO4	Added
Community Health Summaries and Documents - VA Record: Summarization of episode note ● DoD Fifteen	Added
Community Health Summaries and Documents - VA Record: C62 Consults 11488-4 ● Wright State University	Added
Immunizations Record: TINE ● IPO4	Added

To the right of the table is a vertical toolbar with four arrow buttons: up, down, up, and down. Below the table is a yellow-bordered box containing three buttons: 'Clear Selected Record', 'Clear All', and 'Build'.

The bottom section, 'Preview of Record', displays a preview of a patient record for 'VA: IPOTEST4'. It includes a large empty box for a photo, and fields for SSN, Age, DOB, Race, Language, and Gender. Below these are fields for SC Percent, PCM Name, PCM Date (Dec 02, 2010), and PCM Team (TEAM GLY 3). The Language field shows '(h): (444)444-4444' and '(w): (444)444-4444'. The Gender field shows 'M'.

At the bottom left, it says '(0 of 4 ready)'. At the bottom right, there is a yellow-bordered box containing a 'Print' button.

5. When a record is selected for the report, it appears in the **Preview of Record** area of the **Report Builder** pane ([Figure 45](#))
6. Click **Build** to validate and prepare the records selected for the report. If a record can be added to the report with no errors, there will be a **Ready** notation next to it; if a record cannot be added to the report, an **Error** notation will appear next to the record
7. Click **Print** to generate the report, built only with those records that have a **Ready** status

Figure 45 Preview of Record in Report Builder Pane

The screenshot shows the 'Report Builder' window. At the top, it says 'To build a report, right-click an entry in the patient's record and select Add Record to Report.' Below this is a table with 'Selected Items' and 'Status' columns. The items are: 'Patient Demographic IPO4' (Ready), 'Community Health Summaries and Documents - VA Record: Summarization of episode note | DoD Fifteen' (Ready), 'Community Health Summaries and Documents - VA Record: C62 Consults 11488-4 | Wright State University' (Ready), and 'Immunizations Record: TINE | IPO4' (Ready). To the right of the table are navigation arrows. Below the table are buttons for 'Clear Selected Record', 'Clear All', and 'Build'. Below this is the 'Preview of Record' section, which is highlighted with a yellow border. It contains a large empty box for a photo, followed by patient details: VA: IPOTEST4, SSN: [empty], Age: [empty], DOB: [empty], Race: [empty], Language: [empty], SC Percent: [empty], PCM Name: [empty], PCM Date: Dec 02, 2010, PCM Team: TEAM GLY 3, (h): (444)444-4444, (w): (444)444-4444, and Gender: M. At the bottom left, it says '(4 of 4 ready)' and at the bottom right is a 'Print' button.

Selected Items	Status
Patient Demographic IPO4	Ready
Community Health Summaries and Documents - VA Record: Summarization of episode note DoD Fifteen	Ready
Community Health Summaries and Documents - VA Record: C62 Consults 11488-4 Wright State University	Ready
Immunizations Record: TINE IPO4	Ready

Clear Selected Record Clear All Build

Preview of Record

VA: IPOTEST4

SSN: [empty]

Age: [empty]

DOB: [empty]

Race: [empty]

Language: [empty]

SC Percent: [empty]

PCM Name: [empty]

PCM Date: Dec 02, 2010

PCM Team: TEAM GLY 3

(h): (444)444-4444

(w): (444)444-4444

Gender: M

(4 of 4 ready) Print

- The generated report opens in a new tab within the browser window. Save the report to your local system, if desired

Each report generated using the **Report Builder** feature 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. It is intended only for the use of the person(s) named above. If you are not the intended recipient, you are hereby notified that any review, dissemination, distribution, or duplication of this communication is strictly prohibited. If you are not the intended recipient, please contact the sender by reply e-mail, and destroy all copies of the original message.

4.9. 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 from JLV.

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

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

To print a report created in Report Builder, click the **Print** button.

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 46). The tabs above the patient's name provide a demographics summary for each site (VA, DoD, or VLER) the patient has visited.

Figure 46: Patient Demographics Widget

The screenshot shows the Patient Demographics Widget for patient IPOAADLAND, THADDEUS A. At the top, there is a header bar with the patient's name, a red 'Flags' icon, and a 'Commonly Used Widgets' section with a close button (x) and a plus button (+). Below the header, there are three tabs: 'IPO4' (selected with a blue dot), 'IPO5' (with a blue dot), and 'DoD' (with an orange square). The main content area is divided into two columns. The left column contains a large empty rectangular box, followed by 'SC Percent:' with a small input field, 'PCM Name:' with a small input field, 'PCM Date: Dec 02, 2010', and 'PCM Team: TEAM FTC 3'. The right column contains 'SSN:' with a small input field, 'Age:' with a small input field, 'DOB:' with a small input field, 'Race:' with a small input field, '(h): (333)333-3333', '(w): (333)333-3333', and 'Gender: M'. At the bottom right, there is a blue link labeled 'Insurance'.

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

- Clicking the patient's name opens details in a standalone window
- Clicking an **Interface Status** icon ⓘ ⚠ opens the interface status details in a separate window
- Clicking the **Flags** icon above the tabs in the widget opens clinical flag details in a new window

5.1.1. Patient Flags and Alerts

If the patient has one or more clinical warnings, alerts, or flags in their record from VA and DoD sites, the **Flags** icon is displayed next to the **Patient Name** tab, above the **Demographics** widget, on the **Patient Portal** (Figure 47).

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

Figure 47: Patient Flags Indicator

IPOAADLAND, THADDEUS A **Flags** Commonly Used Widgets x +

● IPO4 ● IPO5 ■ DoD

SSN:
Age:
DOB:
Race:
(h): (333)333-3333
(w): (333)333-3333
Gender: M

SC Percent:
PCM Name:
PCM Date: Dec 02, 2010
PCM Team: TEAM FTC 3

[Insurance](#)

Click the **Flags** icon to open the **Patient Flags and Postings** details window ([Figure 48](#)). The window displays a list of alerts and flags within the patient's record. If the patient's record does not contain any clinical warnings, the **Flags** icon is not displayed.

Figure 48: Patient Flags and Postings Details

Flag Details ~ ● IPO4 HIGH RISK FOR SUICIDE

Flag Name:	HIGH RISK FOR SUICIDE
Assignment Narrative:	Testing National Patient Record Flag. Not accepting CHEY260 as Owner Site.

5.1.2. Race Data Terminology Normalization

Race data from VA and DoD sources in the **Patient Demographics** widget is normalized. Hovering over the **Race** information displays the standardized name and code for the race classification, normalized to the Centers for Disease Control (CDC) standard ([Figure 49](#)).

Figure 49: Standardized Race Data

Figure 49 is a screenshot of the JLV (Joint Legacy Viewer) interface, specifically the Patient Search results page for a patient named IPOAADLAND, THADDEUS A. The interface features a top navigation bar with the JLV logo, a search icon, and links for Patient Search, Provider Portal, and Patient Portal. Below the navigation bar, the patient's name is displayed, along with a 'Flags' button and a 'Commonly Used Widgets' section. The main content area shows a large empty box, likely for a patient photo, and a list of demographic information: SC Percent, PCM Name, PCM Date (Dec 02, 2010), and PCM Team (TEAM FTC 3). To the right of this information, there are fields for SSN, Age, DOB, Race, (h), (w), and Gender. The Race field is highlighted with a yellow box and contains the text: National Standard CDC Race, Standardized Name: White, Standardized Code: 2106-3. A link for Insurance is located at the bottom right of the page.

5.1.3. Demographics from Community Partners

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

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

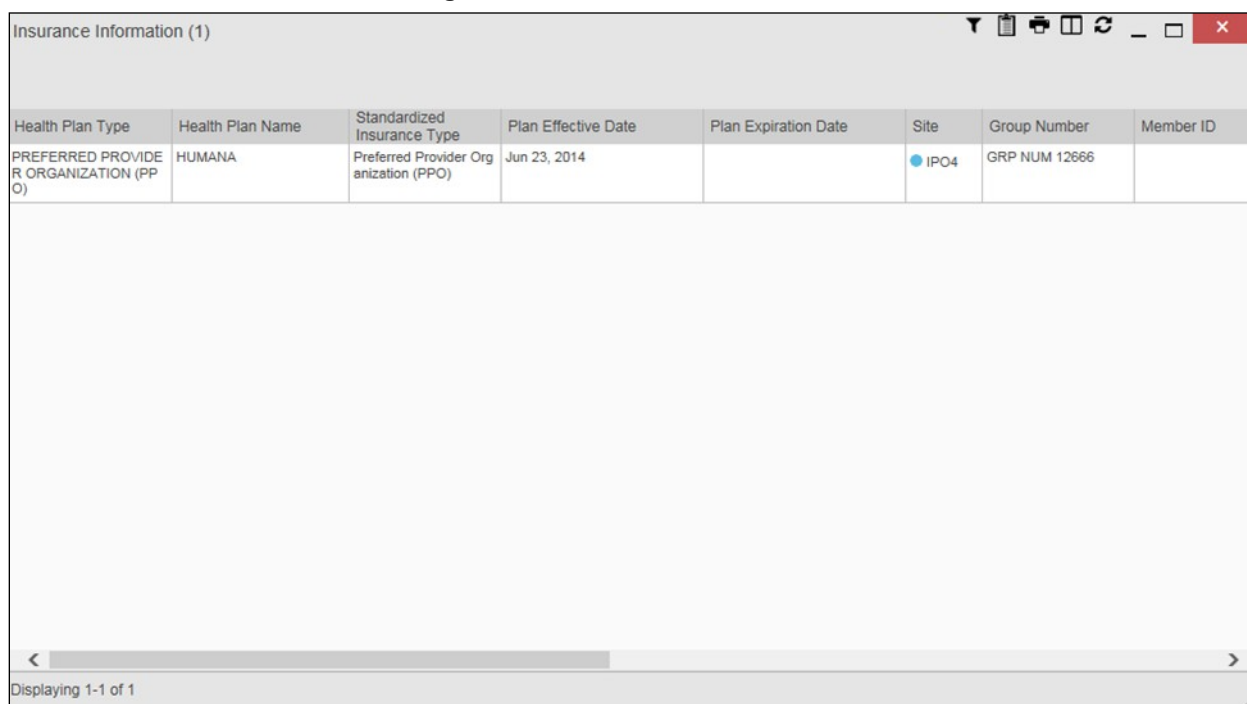
Please Note: VHA users can see the **Include Community Data** option, but it is not yet active. It will be enabled in a future release.

5.1.4. Viewing Third-Party Insurance Information

Third-party payers and insurance information is available from the **Patient Demographics** widget. Click the **Insurance** link in the **Demographics** widget. A new window ([Figure 50](#)) opens with the following insurance information:

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

Figure 50: Insurance Information



The screenshot shows a window titled "Insurance Information (1)" with a standard toolbar. Below the toolbar is a table with the following data:

Health Plan Type	Health Plan Name	Standardized Insurance Type	Plan Effective Date	Plan Expiration Date	Site	Group Number	Member ID
PREFERRED PROVIDER ORGANIZATION (PPO)	HUMANA	Preferred Provider Organization (PPO)	Jun 23, 2014		IPO4	GRP NUM 12666	

Below the table is a large empty area and a scroll bar at the bottom. The status bar at the very bottom indicates "Displaying 1-1 of 1".

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

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

5.2. Documents Widget


The **Documents**  widget ([Figure 51](#)) includes documents from multiple clinical domains, including radiology reports (exams), progress notes, outpatient encounters, consult encounters, discharge summaries (inpatient notes), questionnaires, and Health Artifact and Image Management Solution (HAIMS) records. HAIMS records retrieved by JLV include scanned paper records, imported paper records, scanned non-radiology images, and imported non-radiology images, displayed in chronological order by the document date.

Figure 51: Documents Widget, Minimized View

Documents (5)

Filtered date range: 5/8/17 - 9/5/17

Date	Description	Provider	Image	Site
Jul 31, 2017	DENTAL			● IPO4
Jul 31, 2017	DENTAL			● IPO4
Jun 23, 2017	ECHOGRAM CHEST B-SCAN			● IPO4
Jun 05, 2017	DIABETES NUTRITION MAP CLASS			● IPO4
Jun 05, 2017 11:14 Details	FAMILY HISTORY OF GLAUCOMA			● IPO4

Displaying 1-5 of 5

[More >>](#)


5.2.1. Documents Widget Data

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

- Date
- Description
- Provider
- Image
- Site

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

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

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

Click **More >>** in the minimized view of the **Documents** widget to open the expanded view ([Figure 52](#)). Information in expanded view includes:

- Date
- Description
- Standardized Description
- Provider
- Provider Specialty
- Location
- Status
- Site

Figure 52: Documents Widget, Expanded View

Documents (5)
 Filtered date range: 5/8/17 - 9/5/17

If the information you expect does not appear, expand the date range. [Close Filter](#)

Start date: 05/08/2017 End date: 09/05/2017 [Apply](#) [1w](#) [2w](#) [1m](#) [3m](#) [6m](#) [1y](#) [2y](#) [3y](#)

Filter by Description Filter by Standardized Description Filter by Provider Specialty Filter by Location
 Filter by Source System Filter by Site

Date	Description	Standardized Description	Provider	Provider...	Location	Status	Im...	Source System	Site
Jul 31, 2017	DENTAL			Allopathic and Osteopathic Physicians		PENDING		VistA	IPO 4
Jul 31, 2017	DENTAL			Allopathic and Osteopathic Physicians		PENDING		VistA	IPO 4
Jun 23, 2017	ECHOGRAM CHEST B-SCAN	ULTRASOUND, CHEST (INCLUDES MEDIASTINUM), REAL TIME WITH IMAGE DOCUMENTATION						VistA	IPO 4
Jun 05, 2017	DIABETES NUTRITION MAP CLASS	Education note		Allopathic and Osteopathic Physicians	CHYSQA260			VistA	IPO 4
Jun 05, 2017 11:14	FAMILY HISTORY OF GLAUCOMA			Allopathic and Osteopathic Physicians	CHY ANTICOAG			VistA	IPO 4

Displaying 1-5 of 5 [Show All](#)

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 53](#) displays outpatient encounters details, accessed through the **Documents** widget.

Figure 53: Details View of a Document

Consult Encounters Detail ~ IPO4 DENTAL

Current PC Provider:
 Current PC Team:
 Current Pat. Status:
 Primary Eligibility:
 Patient Type:
 OEF/OIF:

Service Connection/Rated Disabilities
 SC Percent:
 Rated Disabilities:

Order Information
 To Service:
 Attention:
 From Service:
 Requesting Provider:
 Service is to be rendered on an OUTPATIENT basis
 Place: Consultant's choice
 Urgency: Routine
 Clinically Ind. Date: Jul 31, 2017
 Orderable Item: DENTAL


5.2.3. Viewing DoD Sensitive Data

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

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

5.2.4. Display and Filter Options

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

- Click a column title to sort records by that column. If a user sorts on a column that appears in both minimized and expanded views of the widget, the sort is saved to the user profile, and appears in subsequent JLV sessions. If a user sorts on a column that is only available in the expanded view of the widget, subsequent JLV sessions display the default widget sort, or the last sort saved to the user profile.
- Use the **Quick Date Range Selector**, or the **Start Date** and **End Date** calendars, to specify the date range of records to be displayed within the widget. If the information you expect does not appear in the widget display, use the **Start Date** and **End Date** filter options to expand the date range. When a date range filter is applied in an open widget, the date range is displayed in the widget header. Open or close the filter options by clicking the date range in the header.
- Click the **Column Settings** icon  on the widget toolbar to show or hide columns within the widget. Check/uncheck the column names that appear in the pop-up dialog box, then click **Apply**.
- Use the **Filter by Description** dropdown to re-draw the widget and show only the records for the selected description(s). Only available in expanded view.
- Use the **Filter by Standardized Description** dropdown to re-draw the widget and show only the records for the selected description(s). Only available in expanded view.
- Use the **Filter by Provider Specialty** dropdown to re-draw the widget and show only the records for the selected provider type(s). Only available in expanded view.
- Use the **Filter by Location** dropdown to re-draw the widget and show only the records for the selected location(s). Only available in expanded view.

5.2.5. Terminology Normalization

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

- The **Description** column displays the name of a note or document in the patient record. Hovering over an entry in this column displays the standard used for terminology normalization for the clinical domain (Logical Observation Identifiers Names and Codes (LOINC)), and the standardized LOINC name and code for that document.

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


[Figure 54](#) highlights a document mapped to the LOINC standard. The standardized name and code are displayed in the hover text over the record in the **Description** column.

Figure 54: Standardized Name and Code – Documents Widget

Date	Description	Provider	Image	Site
Jul 31, 2017	DENTAL			● IPO4
Jul 31, 2017	DENTAL			● IPO4
Jun 23, 2017	ECHOGRAM CHEST B-SCAN			● IPO4
Jun 05, 2017	Current Procedural Terminology (CPT) Standardized Type: ULTRASOUND, CHEST (INCLUDES MEDIASTINUM), REAL TIME WITH IMAGE DOCUMENTATION Standardized Code: 76604	DR. J. A. SREVALLI		● IPO4
Jun 05, 2017		DR. J. A. SREVALLI		● IPO4

Displaying 1-5 of 5 [More >>](#)

5.3. Community Health Summaries and Documents – VA

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

5.3.1. Community Health Summaries and Documents – VA Widget Data

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


- Date
- Document
- Source

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

Figure 55: Community Health Summaries and Documents – VA, Minimized View

Community Health Summaries and Documents - VA (5)		
Date	Document	Source
Sep 05, 2017	Summarization of episode note	DoD Fifteen
Dec 03, 2014	Continuity of Care CCDA 34133-9-C	Inland NW Health Services
Dec 04, 2014	C62 Pathology 27898-6	Inland NW Health Services
Mar 03, 2013	C62 Consults 11488-4	Wright State University
Jan 01, 2005	C32 Summarization of episode note 34133-9	MedVirginia
Displaying 1-5 of 5		

The **Site List** icon  on the toolbar in the **Community Health Summaries and Documents - VA** widget ([Figure 55](#)) generates a list of community sites where the patient has been seen.

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

5.3.2. Viewing VA Community Health Summary Documents

[Figure 55](#) shows health summary records available from the **Document** column in the **Community Health Summaries and Documents - VA** widget. Clicking a hyperlinked entry in the **Document** column opens the document in a separate browser tab ([Figure 56](#)).



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

Figure 56: Community Health Document

Department of Defense Consolidated CDA Document (C-CDA CCD)
created on **March 18, 2015, 16:20:14 -0400**

Department of Defense

Patient Information | Allergies | Immunizations | Medications | Problem | Procedures | Results | Encounters | Healthcare Providers

[-] Table of Contents


[-] Patient Information

Patient Information	
Address	
Marital status	
Religious Affiliation	
Race	
Ethnicity	
Language(s)	
Preferred Language	

[-] Allergies

Comments						
This section includes all active allergy entries (does not include deleted or unverified entries).						
Allergen	Severity	Reaction	Reaction Severity	Event Type	Event Date	Source
Penicillins	--	Vomiting	--	Drug allergy	20131003	--
ORANGE/PINEAPPLE JUICE (DO NOT USE, NOT SCREENED) (OR	--	Productive Cough	--	Drug allergy	20131003	--
PLUM EXTRACT (PLUM EXTRACT)	--	Shock	--	Drug allergy	20131003	--

5.4. Military Health System (MHS) GENESIS Widget

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

5.4.1. MHS GENESIS Widget Data

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

- Date
- Document Title
- Document Type
- Site

[Figure 57](#) highlights the MHS GENESIS widget in minimized view.

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 57: MHS GENESIS Widget

MHS GENESIS (5)			
Date	Document Title	Document Type	Site
	Patient Continuity of Care Document	Summarization of episode note	DoD
	Micro. Anatomic Path, Rad and Dental Notes	Summarization of episode note	DoD
Jan 31, 2017	Dental Summary	Transition of Care - Referral Summary	DoD
Jan 30, 2017	History and Physical	Hosp Admit H&P note	DoD
Jan 30, 2017	Advance Directive	Advance directives	DoD
Displaying 1-5 of 5			

5.4.2. Viewing MHS GENESIS Documents

Click a hyperlink in the **Document** column in either view of the MHS GENESIS widget to display a Consolidated Clinical Document Architecture (CCDA) document ([Figure 58](#)) in a new browser window.

Figure 58: CCDA Document

3LV Patient Continuity of Care Document - Internet Explorer

https://vaasdtteapp44.aac.dva.v... 3LV Patient Continuity of Car... X

File Edit View Favorites Tools Help

Transition of Care/Referral Summary
created on **February 28, 2017, 14:30:17**,
CST

**MB Military Baseline
Medical Center**

Patient: CHDRONE
CHDRZZTESTPATIENT
DOB: March 3, 1960
Gender: Male

[+] Table of Contents

Patient Information Encounters Vital Signs Problem Allergies Medications Results Immunizations Procedures

Social History Functional Status Assessment and Plan Hospital Discharge Instructions Healthcare Providers Contact Information

[+] Patient Information

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

[+] Encounters

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

6. Troubleshooting

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

6.1. Special Instructions for Error Correction

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

VHA users:

- Have accessed JLV using the VHA URL **REDACTED**)
- Have entered their existing CPRS Access and Verify codes correctly in the fields on the JLV log in page
- Have selected a site from the **Site** dropdown list on the JLV log in page. Most users must specify the individual facility name, or their parent healthcare system name

VBA users:

- Have accessed JLV using the VBA URL (**REDACTED**)
- Have entered their existing CAPRI Access and Verify codes correctly in the fields on the JLV log in page
- Have selected *Veterans Benefits Admin* from the **Site** dropdown list

6.1.1. Log in Page Error Messages

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

Table 6: Error Messages and Resolution Steps

Error Message	Resolution Steps
Access denied. You are not an authorized user	<p>WHAT? You see the error message <i>Access Denied. You are not an authorized User.</i></p> <p>WHY? Possible causes are: a PIV card processing problem; selection of the wrong security certificate; you are not an authorized user.</p> <p>FIX IT:</p> <ol style="list-style-type: none">1) Close your browser window2) Re-insert your PIV card and relaunch JLV3) Select a certificate that is not expired, and specifies <i>Issued by: Veterans Affairs CA B1</i>4) If unsuccessful, contact the ESD

Error Message	Resolution Steps
Could not save User Profile	<p>WHAT? You receive the error message <i>Could not save User Profile</i>.</p> <p>WHY? The error occurred during PIV authentication. It is typically a PIV card processing problem, or the wrong security certificate is chosen.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Close your browser window 2) Re-insert your PIV card and relaunch JLV 3) Select a certificate that is not expired, and specifies <i>Issued by: Veterans Affairs CA B1</i> 4.) If unsuccessful, close all open IE windows/tabs. Open IE and try JLV again
Not a valid ACCESS/VERIFY CODE pair	<p>WHAT? You see the error message <i>Not a valid ACCESS CODE/VERIFY CODE pair</i> error at the log in screen.</p> <p>WHY? 1) JLV could not match your Access and Verify codes to the site selected in the dropdown, or 2) A user name and password were entered instead of Access/Verify codes.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Select the parent VistA host site for your facility (VHA users) Example: Wichita uses <i>Kansas City, MO</i> 2) Re-enter your Access and Verify codes (CAPRI codes for VBA users, CPRS codes for VHA users)
Page cannot be displayed	<p>WHAT? You receive a <i>Page cannot be displayed</i> error when launching JLV.</p> <p>WHY? The JLV URL requires certain IE settings</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Click the Tools menu (press ALT-X) in IE 2) Select Internet Options 3) When the dialog opens, click the Advanced tab 4) Scroll down in the list until you see the Secure Sockets Layer (SSL) 2.0 setting. Ensure it is NOT checked 5) Ensure that the Transport Layer Security (TLS) 1.0, 1.1 and 1.2 settings ARE checked 5) Click OK to close the dialog, then relaunch JLV. The page should load
Smart Card required	<p>WHAT? You see the error message <i>Smart Card Required</i>.</p> <p>WHY? Your Smart card was not read by Windows Security and JLV before opening the JLV URL.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Close all browser sessions and browser-based applications 2) Re-insert your PIV card and reopen the JLV URL 3) If unsuccessful, close all open IE windows/tabs. Open IE and try JLV again

Error Message	Resolution Steps
VERIFY CODE must be changed before continued use	<p>WHAT? You receive the message <i>VERIFY CODE must be changed before continued use</i> at the log in screen.</p> <p>WHY? Your CPRS or CAPRI VERIFY CODE has expired.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Open CPRS, VistA, or CAPRI (VBA users) 2) Select the Change Verify Code checkbox on the sign-on dialog before clicking OK 3) You will be prompted to create a new Verify code 4) Once your Verify code is changed for CPRS or CAPRI, relaunch JLV and the new code will be recognized immediately

6.1.2. System Error Messages

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

Table 7: System Error Messages

Message	Description
<i>No Message displays, but behavior occurs:</i> The browser window does not allow the user to scroll to widgets, or access the JLV icons on the portal pages.	<p>The issue can be resolved by:</p> <p>Accessing JLV using IE 11</p> <p>Using a monitor with a minimum screen resolution of 1024 x 768</p> <p>Setting the browser zoom feature to 100%</p> <p>If browser display issues continue, log out of JLV, close the browser window, open a new browser window, and log in to JLV again.</p>
Warning: An error occurred while attempting to retrieve VistA Imaging Viewer URL.	Either VistA Data Service or VistA Imaging Exchange is offline, and JLV is unable to retrieve the necessary data object to launch a VistA Imaging Viewer instance within JLV.
MVI Message: There are no patients found using the current parameters.	No patient records were found using the information entered in the Patient Search dialog box. Re-enter patient identifiers in the Patient Search dialog box fields after verifying the accuracy of the information
MVI Error: Patient not found with search elements entered, please provide additional patient identifying information and search again.	No unique patient is found with the identifiers used in the search. Click OK to return to the Patient Search window and provide additional patient identifiers, like the full first name or DOB.
MVI Error: Your query yields too many results. Please modify your search parameters to narrow the search.	JLV adheres to VA guidelines and blocks search results when a search request yields more than 10 patients. Modify the information in the Patient Search dialog box using additional patient identifiers to reduce the number of results.
MVI Error: Application Reject. There was an error attempting to process your query. Please modify your search parameters and try again.	There may be one or more errors in the Patient Search dialog fields. Validate the patient identifiers and try the search again. If problems persist, there may be an error between MVI and DEERS.

Message	Description
You do not have authorization to view this record. Security regulations prohibit computer access to your own medical record.	VA security regulations prevent a user to access their own medical records.
You do not have authorization to view this record. Your SSN is missing from the NEW PERSON file. Contact your ACP Coordinator.	Per VA policy, JLV does not allow access to patient records if the JLV user's SSN is not in their VistA profile.
An error occurred while attempting to retrieve the document.	Occurs when something goes wrong when JLV tries to retrieve a selected document.
An error occurred while attempting to display the document.	Occurs when JLV tries to receive a document, but has trouble converting the document to a viewable format.

6.1.3. VA VLER Server Error Message

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

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

Message	Description
Error displayed in widget: <i>Something went wrong: Internal Server Error (500)</i>	This message appears in the Community Health Summaries and Documents – VA widget when the VA VLER service is not available. If the message persists after 5 minutes, contact the ESD to report the connection error.

7. Acronyms and Abbreviations

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

Table 9: Acronyms and Abbreviations

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

Acronym	Description
TLS	Transport Layer Security
UI	User Interface
URL	Uniform Resource Locator
VA	Department of Veterans Affairs
VBA	Veterans Benefits Administration
VDS	VistA Data Service
VHA	Veterans Health Administration
VistA	Veterans Health Information Systems and Technology Architecture
VLER	Virtual Lifetime Electronic Record