

VA MPN Form Builder User Manual

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1. Introduction

The Department of Veterans Affairs (VA) Modernized Progress Notes (MPN) Form Builder creates the form definitions or templates, along with logic, validation, and overall content that the VA MPN Form Runner application will provide to clinicians for completion.

1.1 Purpose

The purpose of this VA MPN Form Builder User Manual is to provide an overview, access procedures, and functionality usage procedures for the software. Also included in this guide is a general overview of the MPN application.

1.2 MPN Application Overview

The VA MPN application brings Progress Note Construction Set (PNCS)/Compensation and Pension Record Interchange (CAPRI)-style template creation and execution into the modern technological environment, targeting implementation that is operating system agnostic. The VA MPN improves the ease of provider documentation using primarily mobile devices while maintaining legacy compatibility with desktop workstations. Additionally, the VA MPN application includes the development of a sophisticated What-You-See-Is-What-You-Get (WYSIWYG) database-driven design environment. The VA MPN application includes the ability to extend form functionality to support back-end decision support, such as support for coding form objects to standardized coding schemes. The VA MPN application is for the development of code for use within VA and for subsequent release by VA to the open source community. Code developed for the VA MPN application will be delivered to VA for eventual deployment to VA production systems.

1.3 Software Overview

VA MPN Form Builder (formerly known as PNCS), utilizing Orbeon Form Builder open source software as its core software, allows end users to build and deploy forms quickly and efficiently from desktop web browsers. Some key product features of the VA MPN Form Builder are:

- Completely web-based; therefore, software installation is not necessary
- Cross browser support for desktop environments
- WYSIWYG ("What You See Is What You Get") designer
- Versioning of form templates
- Common data types are supported for validation and User Interface (UI) controls
- Builds forms with a HyperText Markup Language (HTML5) output
- Internationalization is supported (forms in multiple languages)
- Advanced Features, such as a built-in Web Services editor, where services and actions can be built, without writing code, directly from the editor
- Produces accessible forms, without scripts, using either Asynchronous Java Script and XML (AJAX) or other modes
- Open Source Model (can be tailored to fit the needs of VA)

1.4 Project References

Note: Due to policy constraints, active links cannot be included in this document. To access the links, copy the URL and paste it into your browser.

- Orbeon Forms Wiki: <http://wiki.orbeon.com/forms/>
- VA MPN Form Runner User Manual - Publishing pending approval
- MPN Performance Work Statement (PWS)

1.4.1 MPN Team Information

Team Member	Role	Email
-------------	------	-------

	Software Developer	
	Senior Web Designer	
	Technical Writer	
	SQA Tester	
	Sr. User Experience Architect	
	Lead Developer/Architect	
	Business Analyst/ScrumMaster	
	Software Developer	
	Program Manager	

1.4.2 Coordination

The VA MPN application will not be in production and Coordination for the VA MPN Form Builder application is not necessary at this time. If assistance with the tool is needed, please contact the MPN team members for assistance.

1.4.3 Help Desk

The VA MPN application will not be in production and Help Desk support for the VA MPN Form Builder application is not necessary at this time. If assistance with the tool is needed, please contact the MPN team members for assistance.

1.5 Organization of the Manual

Section 1: Introduction

The Introduction section provides the purpose of this manual, an overview of the VA MPN application, an overview of the software used, project references, contact information for MPN team member to seek additional information, and acronyms and abbreviations list for this manual.

Section 2: System Summary

The System Summary section provides a graphical representation of the equipment, communication, and networks used by the system, user access levels, how the software will be accessed, and contingencies and alternative modes of operation.

Section 3: Getting Started

Information for the Getting Started section gives step-by-step instructions about VA MPN Form Builder's functionality.

Section 4: Software Functionality Usage Procedures

This section gives the user the "how to" information to use VA MPN Form Builder, including many step-by-step procedures.

Section 5: Caveats and Exceptions

MPN will not be in production. MPN will be delivered to VA for eventual deployment to VA production systems.

Section 6: HTML5 Use in VA MPN Form Builder

This section gives information about how experienced users may add HTML to forms.

Section 7: Project Specific Scenarios

This section provides a link to the scenarios used during Usability Testing

Section 8: Troubleshooting

This section provides troubleshooting for the VA MPN Form Builder User.

1.6 Acronyms and Abbreviations

Acronym	Definition
ADR	Administrative Data Repository
AJAX	Asynchronous Java Script and XML
API	Application Programming Interfaces
ASCII	American Standard Code for Information Exchange
CAPRI	Compensation and Pension Record Interchange
CDW	Corporate Data Warehouse
CPRS	Computerized Patient Record System
CRUD	Create, Read, Update, and Delete

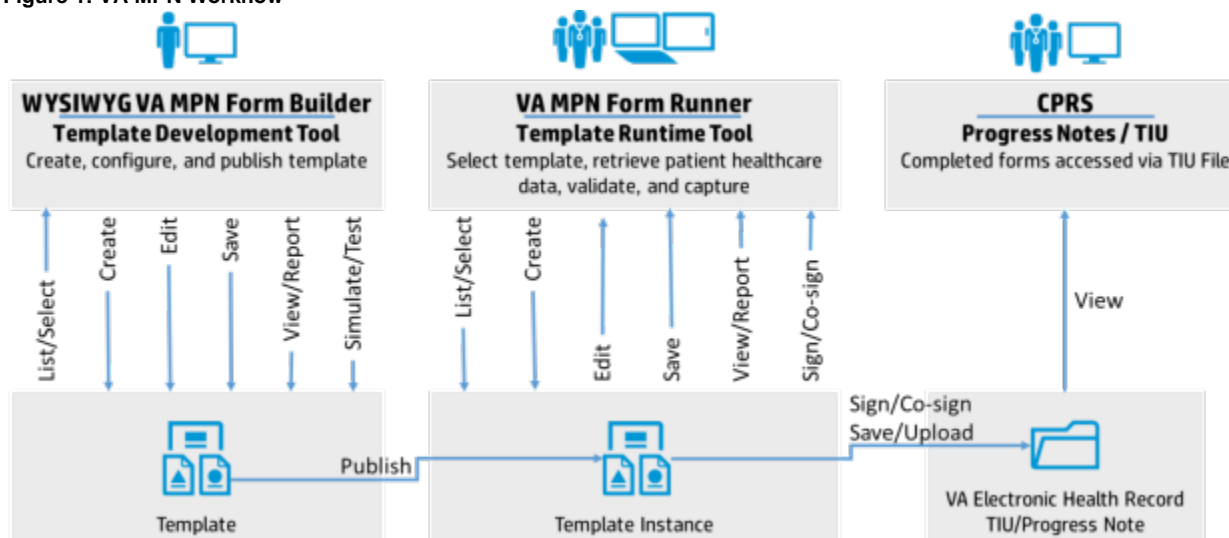
HA	Health Adapter
HTML	HyperText Markup Language
MPN	Modernized Progress Notes
PNCs	Progress Note Construction Set
PWS	Performance Work Statement
RBAC	Role Based Access Control
REST	Representational State Transfer
TIU	Text Integration Utility
UI	User Interface
VA	Department of Veterans Affairs
VistA	Veterans Health Information Systems and Technology Architecture
WYSIWYG	What-You-See-Is-What-You-Get
XForms	Extensible Markup Language Forms
XML	Extensible Markup Language

2.0 System Summary

2.1 System Configuration and Data Flows

The VA MPN Form Builder application allows an Administrative user or Business Analyst the ability to create forms or form templates using the VA MPN Form Builder editor. The created forms will be later used by the VA MPN Form Runner application. The expected overall MPN workflow when it is eventually production ready is shown below in Figure 1. The TIU is currently out of scope, but may be included in later functionality.

Figure 1: VA MPN Workflow

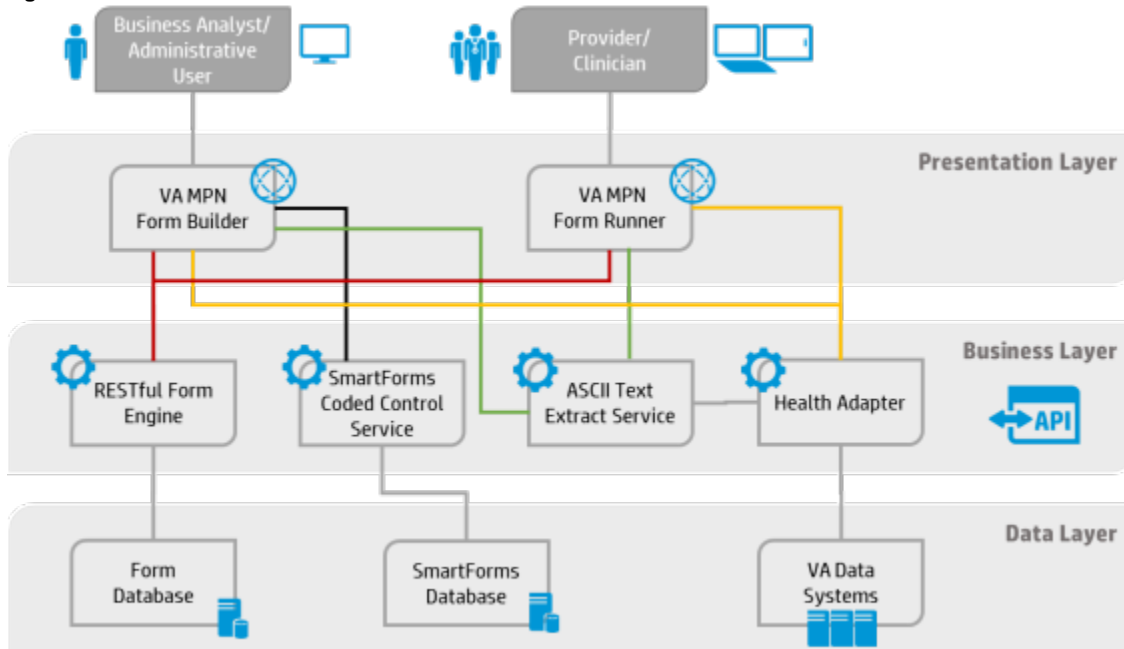


VA MPN Form Builder application is composed of three layers: Presentation, Business, and Data (Figure 2).

- **Presentation Layer:** Houses the web-based User Interface (UI) through which a Business Analyst or Administrative user would create forms or templates. The VA MPN Form Builder UI will allow the end user to connect to, configure, and use the Application Programming Interfaces (APIs) from the Business Layer.
- **Business Layer:** Comprised of four main APIs that include:
 - Representational State Transfer (REST)ful Form Engine (handles requests and responses from the VA MPN Form Builder UI, performing business logic functions and Create, Read, Update, and Delete (CRUD) functions against the Form Database in XForms format)
 - Terminology Engine (handles requests and responses from the VA MPN Form Builder UI, performing business logic functions, and validation of standardized terminology datasets)
 - American Standard Code for Information Exchange (ASCII) Text Extract Service (handles the conversion of XForms format to ASCII Text upon completion and signature of a form to be subsequently saved to VA Data Systems)

- Health Adapter (HA) (handles requests and responses from all backend VA Data Systems)
- **Data Layer:** Holds the data that is being used by the Business Layer APIs and the Presentation Layer UI. This layer is comprised of a Form Database that holds partially completed and completed forms as well as form templates in XForms format, a Terminology datastore, and VA Data Systems.

Figure 2: User Interaction with VA MPN Form Builder



Additional information and modifications will be made to the System Configuration and Data Flows section in future iterations.

2.2 User Access Levels

VA MPN Form Builder requires the user to have administrative access to the MPN application.

2.2.1 System User Keys

The system security keys are used to direct or redirect the user to the appropriate app, VA MPN Form Builder or VA MPN Form Runner. The VistA security keys in use are:

- MPN_ENT_USER - For a MPN user that has access to Form Runner
- MPN_ENT_ADMIN - For a MPN Admin that has access to both Form Builder and Runner

Within the MPN application, the authorization code wraps the VistA keys and adds the prefix ROLE_. For example:

- ROLE_MPN_ENT_USER
- ROLE_MPN_ENT_ADMIN

2.3 Software Access Procedure

Refer to Section 3: Getting Started for more information on accessing VA MPN Form Builder.

2.4 Contingencies and Alternate Modes of Operation

The VA MPN application will not be in production. The VA MPN application will be delivered to VA for eventual deployment to VA production systems.

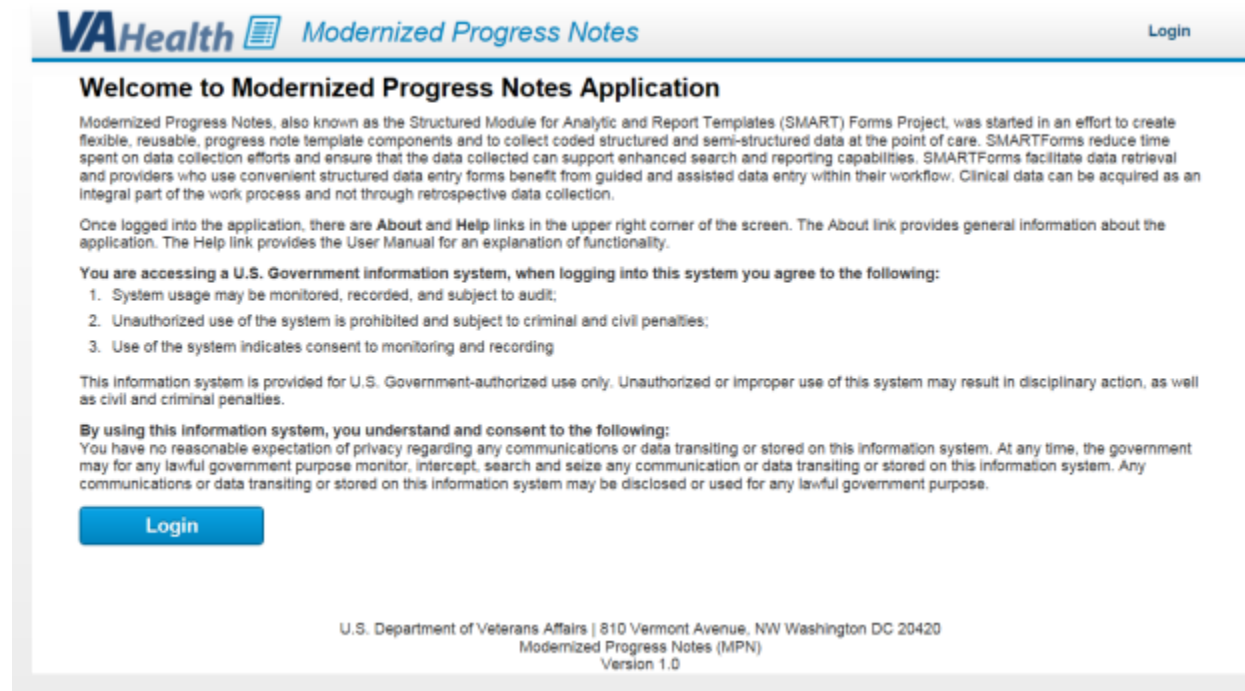
3. Getting Started

3.1 Logging In

To log in, the user first enters the URL of the VA MPN Form Builder/Form Runner application in a compatible browser

(https://mpn.eslabs.xw.ssn.hp.com/mpn/welcome/). The Welcome screen (Figure 3) appears with a **Login** button on the lower left and a **Login** link on the upper right (circled). Both are acceptable links to the Login screen.

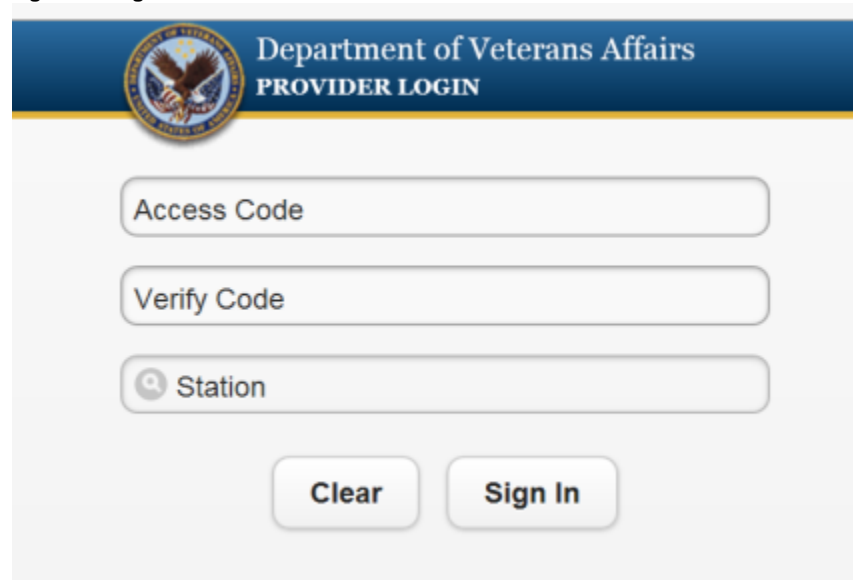
Figure 3: Welcome Screen with Login Links



The screenshot shows the 'Welcome to Modernized Progress Notes Application' page. At the top left is the 'VAHealth' logo and 'Modernized Progress Notes' text. At the top right is a 'Login' link. The main heading is 'Welcome to Modernized Progress Notes Application'. Below it is a paragraph describing the project. Then, it states 'Once logged into the application, there are About and Help links in the upper right corner of the screen.' This is followed by a section titled 'You are accessing a U.S. Government information system, when logging into this system you agree to the following:' with three numbered points. Below that is a paragraph about unauthorized use. Then, a section titled 'By using this information system, you understand and consent to the following:' with a paragraph about privacy. At the bottom left is a blue 'Login' button. At the bottom center is the footer: 'U.S. Department of Veterans Affairs | 810 Vermont Avenue, NW Washington DC 20420', 'Modernized Progress Notes (MPN)', and 'Version 1.0'.

The **Login** screen (Figure 4) requires the user to enter a valid **Access Code**, **Verify Code**, and to select the desired **VA station** from a dropdown menu. The **Station** field is a dropdown menu with smart search capability. Once the necessary information is entered (Figure 5), the user clicks the Login button to continue. If an error is made in entering the login data, the **Clear** button can be clicked which will clear all of the entries in the three fields.

Figure 4: Login Screen



The screenshot shows the 'Department of Veterans Affairs PROVIDER LOGIN' screen. It features the VA seal on the left. There are three input fields: 'Access Code', 'Verify Code', and 'Station'. The 'Station' field has a magnifying glass icon on the left. Below the fields are two buttons: 'Clear' and 'Sign In'.

Figure 5: Login Screen Filled In



Department of Veterans Affairs
PROVIDER LOGIN

.....

.....

🔍 Martinsburg VAMC ✕

Search Results

Martinsburg VAMC - Martinsburg - WV

Most Recent Facilities

Martinsburg VAMC - Martinsburg - WV

Clear Sign In

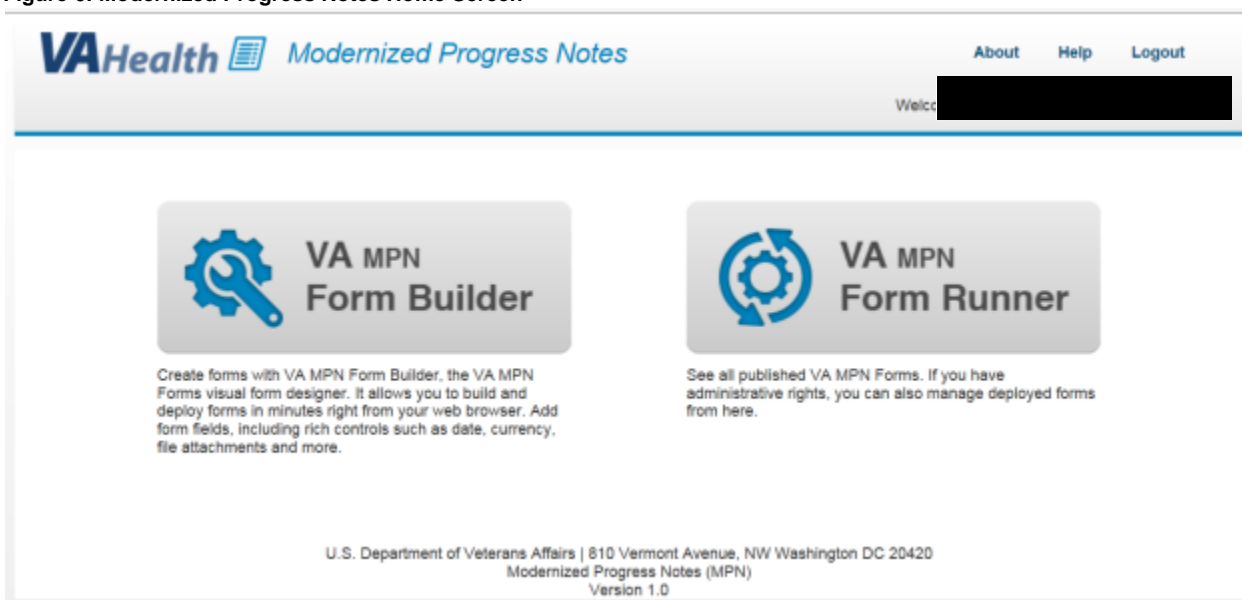
Once the information is entered, the user clicks the **Sign In** button to continue. The VA MPN Home screen appears (Figure 6). The VA MPN Home Screen displays with an option for VA MPN Form Builder on the left and VA MPN Form Runner on the right as seen in Figure 6.

Note: VA MPN Form Builder requires an Administrator-level user role that will allow access to the VA MPN and VA MPN Form Runner applications. Only clinical-level users will have access to the VA MPN Form Runner application.

The Form Runner user will be taken to the Form Runner Home screen. For further information on using Form Runner, see the Form Runner User Manual.

Click the VA MPN Form Builder icon (arrow, Figure 6) to continue.


Figure 6: Modernized Progress Notes Home Screen



VAHealth Modernized Progress Notes


About Help Logout

Welcome [REDACTED]



VA MPN Form Builder

Create forms with VA MPN Form Builder, the VA MPN Forms visual form designer. It allows you to build and deploy forms in minutes right from your web browser. Add form fields, including rich controls such as date, currency, file attachments and more.



VA MPN Form Runner

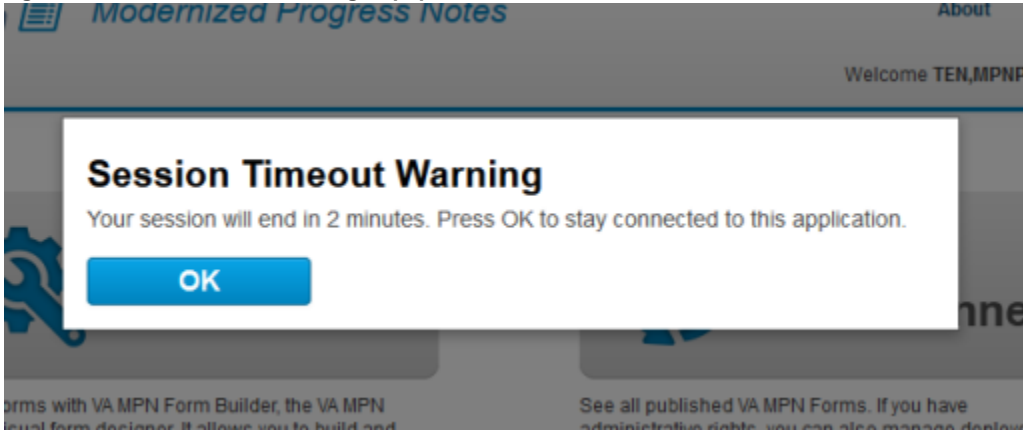
See all published VA MPN Forms. If you have administrative rights, you can also manage deployed forms from here.

U.S. Department of Veterans Affairs | 810 Vermont Avenue, NW Washington DC 20420
Modernized Progress Notes (MPN)
Version 1.0

Note: If the app is left unused for more than 13 minutes, a **Session Timeout Warning** popup box will appear to remind the user to continue to

work or the app will automatically sign off (Figure 7). If the OK button is not clicked within the time limit, the app will sign off. If no action is taken, the user will be logged out at 15 minutes of inactivity.

Figure 7: Session Timeout Warning Popup

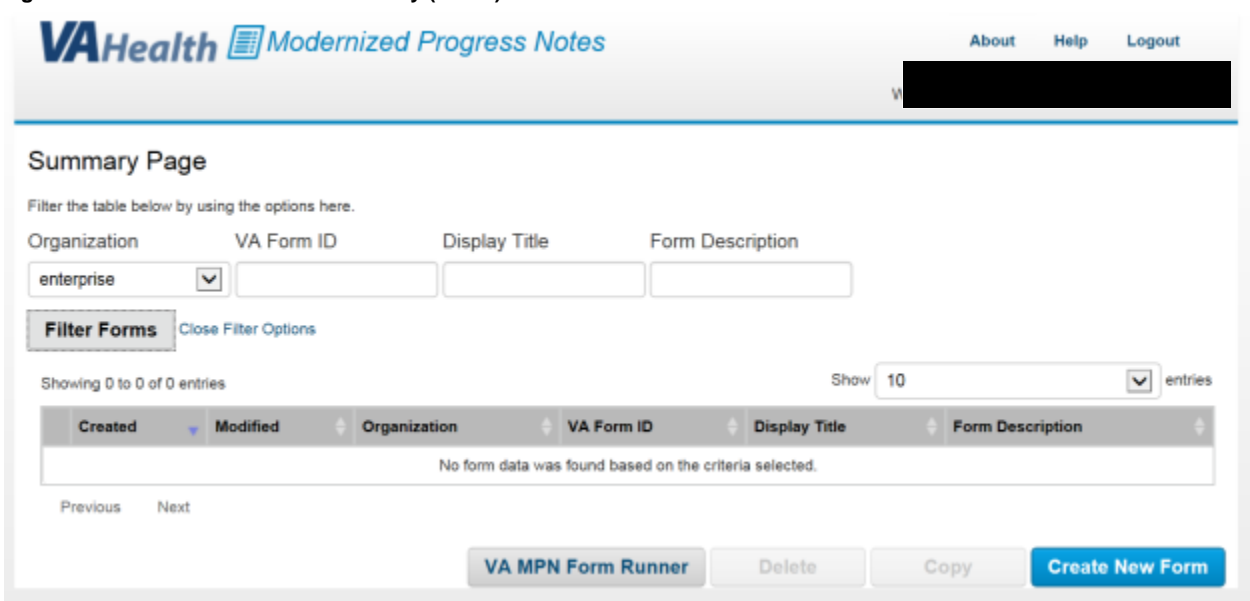


3.2 System Menus

There are two sets of System Menus in VA MPN Form Builder. The System Menu for VA MPN Form Builder is found on the Summary Page (Figure 8). The System Menu is shown inside the circle in Figure 12. Clicking the **VA MPN Form Runner** button takes the user to the VA MPN Form Runner Summary Page. As mentioned earlier, those using VA MPN Form Runner should refer to the VA MPN Form Runner User Manual. The Form Builder functions available here are:

- **Delete** (grayed out in Figure 8. This button remains grayed out until the user has a form displayed) allows the user to delete a form.
- **Copy** (grayed out here in Figure 8. This button remains grayed out until the user has a form displayed) allows the user to copy a form.
- **Create New Form** allows the user to create a new form.

Figure 8: VA MPN Form Builder Summary (Home) Screen



The second set of system menus is found on the Form Structure "WYSIWYG" screen during form creation, such as in Figure 9.

Figure 9: Second Set of System Menus



This **Summary** menu consists of five buttons on the lower right of the Summary Page.

- The **Summary** button returns the user to the Summary page from the screen the user is currently viewing.
- The **Create New Form** button allows the user to create a new form.
- The **Test** button allows the user to test a form and view it as it will be seen in the VA MPN Form Runner application.
- The **Publish** button (grayed out here) allows the user to publish the form for use in VA MPN Form Runner.
- The **Save** button allows the user to save the form after it is created.

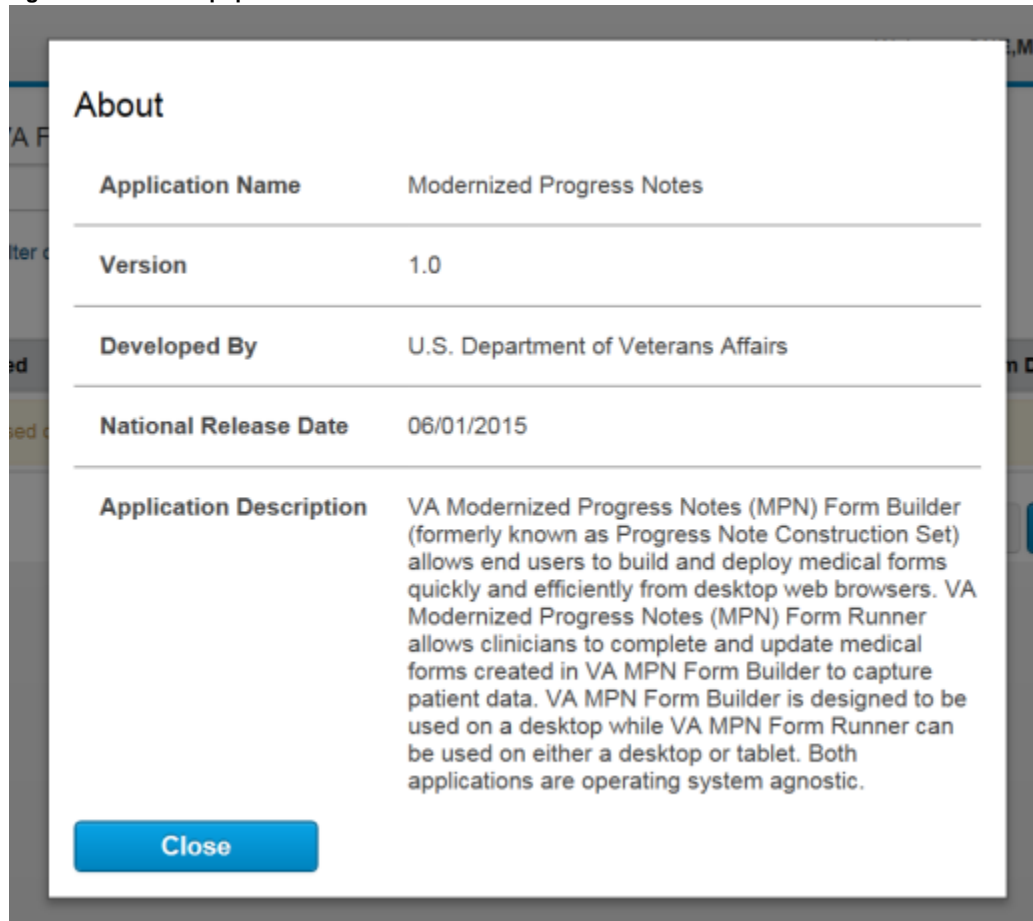
4. Software Functionality Usage Procedures

4.1 VA MPN Form Builder – Form Creation Basics, Help, About

When the VA MPN Form Builder option is clicked, the VA MPN Form Builder Summary Page appears as shown in Figure 12. Note that at the top right of the screen, there are links to the **About** and **Help** screens, as well as a Logout link.

The **About** link opens the **About** popup box, where basic information about the app is located (Figure 10). Clicking the **Close** button returns the user to the Summary Page.

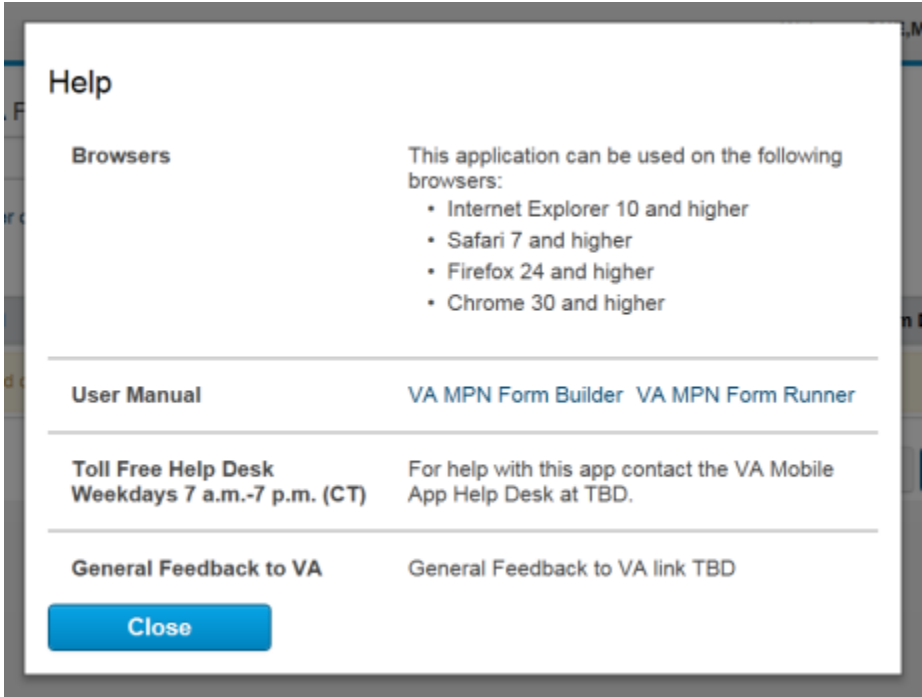
Figure 10: About Popup



Clicking the **Help** link opens the Help popup, which contains browser compatibility information, links to the VA MPN Form Builder and Form Runner User Manuals, the phone contact for the Help Desk, and a link to send general feedback to VA (Figure 11). Clicking the **Close** button

returns the user to the Summary Page.

Figure 11: Help Popup



4.1.1 Form Builder Summary Page

This screen allows the user to Search, Delete, and Copy forms already created, as well as to Create new forms. There is a dropdown menu to select the user's Organization (Figure 17). The default Organization for the dropdown menu is "enterprise." The user can search for form(s) by entering partial VA Form ID, Display Title, and/or Form Description.

Figure 12: VA MPN Form Builder Summary Page

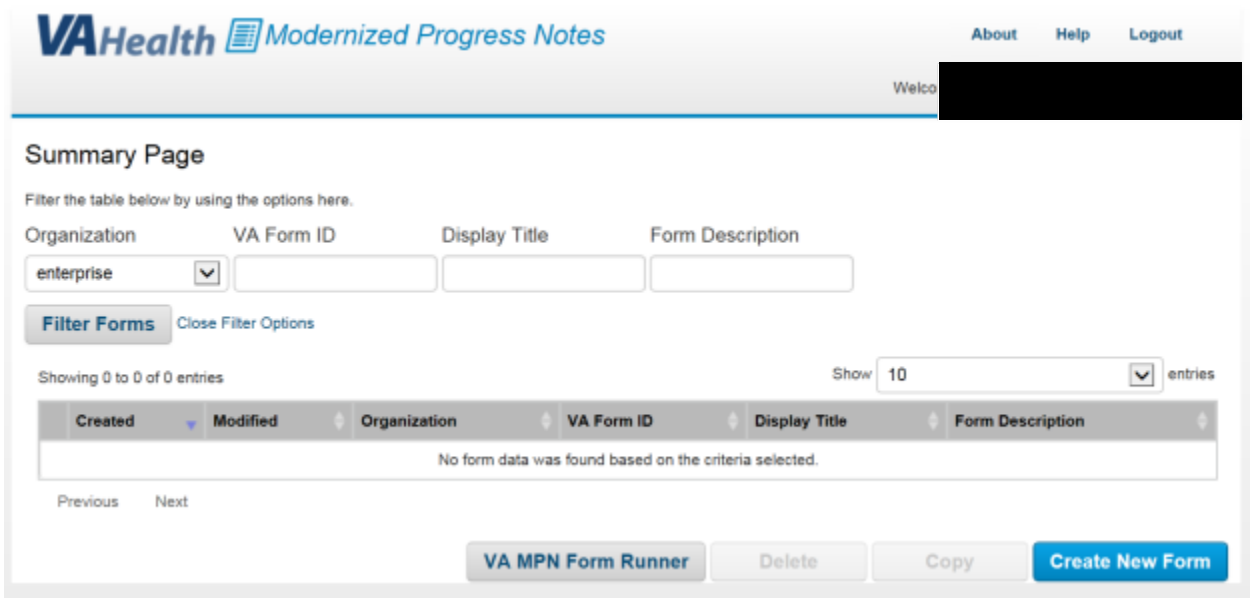
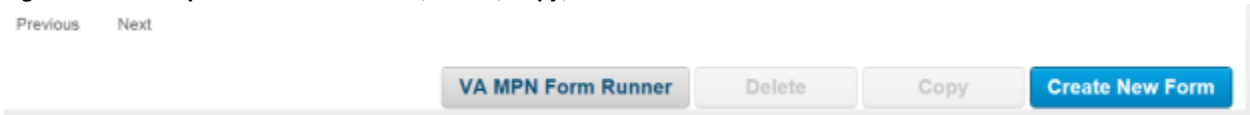


Figure 13: Close-up View of Form Runner, Delete, Copy, Create New Form Buttons



The **VA MPN Form Runner**, **Delete**, **Copy**, and **Create New Form** buttons (Figure 13) are available to the right of the number scroller. Note the **Previous** and **Next** links. When clicked, these links move the user between the pages of the search results on the Form Summary Page, showing the templates that satisfy the search query on this page. When an item in the list is clicked, it will take the user to that particular form (Figure 14, Figure 16). Note that Figure 14 is truncated for space reasons. Also note the black circles at the top of each column in Figure 14. These call out the locations of the **Ascending/Descending Sort Arrows**. Clicking these arrows will change the sorting order of the items in the column

accordingly. The Summary Page can show 10, 25, 50 or 100 template entries per page. The dropdown menu **Show ... entries** dropdown menu (box, Figure 14) allows the user to select the number of search template entries per page. If there are more forms, a small menu at the lower left of the page allows the user to go to the previous page of results if it applies, or the next page of results if it applies, or to a page close to the current page of results (Figure 15).

Figure 14: Summary Page with Sample Forms

VAHealthModernized Progress Notes

AboutHelpLogout

Summary Page

Filter the table below by using the options here.

Organization

VA Form ID

Display Title

Form Description

test

Filter Forms

Close Filter Options

Showing 1 to 10 of 24 entries

Show10entries

	Created	Modified	Current Version	Organization	VA Form ID	Display Title	Form Description
<input type="checkbox"/>	January 22, 2015 10:49:34	January 22, 2015 12:01:56	1	test	test-mb	test	test
<input type="checkbox"/>	January 21, 2015 13:19:36	January 22, 2015 10:47:48	Not Published	test	form-control-val	Form control validation	Form control validation
<input type="checkbox"/>	January 2, 2015 07:21:09	January 2, 2015 07:21:09	Not Published	test	refresh_lib	Library Refresh	Refresh the library
<input type="checkbox"/>	December 10, 2014 15:54:36	December 16, 2014 11:43:07	Not Published	test	test	test	test
<input type="checkbox"/>	November 24, 2014 15:44:15	November 24, 2014 15:44:15	Not Published	test	test_lm_1	Test LM Form 1	Test LM Form 1

Note that when a form is deleted, it is only deleted from the Summary Page. A record is kept within the relational database used by the application, but the form is no longer available to the user.

Figure 15: Close up of Summary Page Previous/1/2/3/Next Menu

☐ November 21, 2014 15:13:08

☐ November 21, 2014 15:13:08

enterprise

L_ent_23

Test Enterprise 23

Previous

1

2

3

4

5

...

13

Next

Immediately below the Organization pulldown menu on the left, is a **Filter forms** button and a clickable field to **Close filter options** (Figure 16). The grid is where the results of a Search are displayed.

Figure 16: Filter Forms and Close Filter Options

Summary Page

Filter the table below by using the options here.

Organization	VA Form ID
<div>enterprise</div> <div></div>	<div></div>

Filter Forms

Close Filter Options

Filter returned 0 forms.

Figure 17: Close Up View of Organization Pulldown

Organization

enterprise

orbeon

test

4.1.2 Searching Forms

It is a good practice to search for a form that meets the need before creating a new form. To Search for a form, the user starts from the **Summary Page** (Figure 12). First, set the search terms so VA MPN Form Builder knows what to search for. The user may search by **Organization**, **VA Form ID**, **Display Title**, or **Form Description**. These terms may also be used together, which may make the filtering much faster by eliminating false matches.

Figure 18: Summary Page Search Fields

Summary Page

Filter the table below by using the options here.

Organization	VA Form ID	Display Title	Form Description
<div>enterprise</div> <div></div>	<div></div>	<div></div>	<div></div>

Filter Forms

Close Filter Options

Filter returned 0 forms.

The Organization pulldown is shown close up in Figure 17. Type in the search terms in the appropriate fields and click **Filter Forms** (Figure 20). The screen in Figure 21 appears. Depending on the filter terms and the number of forms in VA MPN Form Builder, none, only one, a few, or a list of forms may appear in the filter results. The user does not need to fill in all the terms to filter the forms. If a filter results in no matches, the screen in Figure 19 appears.

Figure 19: No Forms Found Matching Filter Terms

Modernized Progress Notes

[About](#)
[Help](#)
[Logout](#)

Summary Page

Filter the table below by using the options here.

Organization
VA Form ID
Display Title
Form Description

enterprise

Filter Forms
Close Filter Options

Showing 0 to 0 of 0 entries

Show
10
entries

Created	Modified	Current Version	Organization	VA Form ID	Display Title	Form Description
No form data was found based on the criteria selected.						

[Previous](#)
[Next](#)

[VA MPN Form Runner](#)
[Delete](#)
[Copy](#)
[Create New Form](#)

Figure 20: Filter Forms with Some Terms Filled In

Summary Page

Filter the table below by using the options here.

Organization
VA Form ID
Display Title
Form Description

test
form_for_user_manual
Form for User Manual X

Filter Forms
Close Filter Options

Figure 21: Results from Filter Terms Used in Figure 17

Modernized Progress Notes

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Summary Page

Filter the table below by using the options here.

Organization
VA Form ID
Display Title
Form Description

test
form_for_user_manual
Form for User Manual

Filter Forms
Close Filter Options

Showing 1 to 2 of 2 entries

Show
10
entries

Created	Modified	Current Version	Organization	VA Form ID	Display Title	Form Description
<input type="checkbox"/> November 14, 2014 15:16:37	January 28, 2015 13:45:04	Not Published	test	form_for_User Manual	Form for User Manual	This is a test form for the User Manual
<input type="checkbox"/> July 18, 2014 07:23:59	August 25, 2014 12:05:12	Not Published	test	form_for_User Manual	Form for User Manual	This is a test form for the User Manual

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4.1.3 Copying Forms

Should a user wish to **Copy** a form to use as a guide to building a similar form, a search for the similar form is necessary. The user clicks the **Summary** button to move to the **Summary** page. From there, the user searches for the form to copy. Once that form is found, the user clicks the check box to select it (Figure 22).

Figure 22: Summary Page with Form to be Copied Checked

VAHealth Modernized Progress Notes

About Help Logout

Summary Page

Filter the table below by using the options here.

Organization VA Form ID Display Title Form Description

Filter Forms Close Filter Options

Showing 1 to 10 of 24 entries Show 10 entries

	Created	Modified	Current Version	Organization	VA Form ID	Display Title	Form Description
<input type="checkbox"/>	January 22, 2015 10:49:34	January 22, 2015 12:01:55	1	test	test-mb	test	test
<input type="checkbox"/>	January 21, 2015 13:19:36	January 22, 2015 10:47:48	Not Published	test	form-control-val	Form control validation	Form control validation
<input type="checkbox"/>	January 2, 2015 07:21:09	January 2, 2015 07:21:09	Not Published	test	refresh_lib	Library Refresh	Refresh the library
<input type="checkbox"/>	December 10, 2014 15:54:36	December 16, 2014 11:43:07	Not Published	test	test	test	test
<input type="checkbox"/>	November 24, 2014 15:44:15	November 24, 2014 15:44:15	Not Published	test	test_lm_1	Test LM Form 1	Test LM Form 1
<input checked="" type="checkbox"/>	November 14, 2014 15:16:37	January 28, 2015 13:45:04	Not Published	test	form_for_User Manual	Form for User Manual	This is a test form for the User Manual
<input type="checkbox"/>	November 14, 2014 15:16:36	January 7, 2015 15:07:08	1	test	test-prosst-1123	Test Session Timer	Test Session Timer.
<input type="checkbox"/>	October 27, 2014 08:18:01	December 1, 2014 15:13:59	1	test	test-prosst-1123	Test Session Timer	Test Session Timer.
<input type="checkbox"/>	September 19, 2014 14:17:40	December 2, 2014 13:15:40	1	test	uz-test-1	Form builder test 1	Usability Testing
<input type="checkbox"/>	September 8, 2014 15:30:02	September 16, 2014 12:01:13	Not Published	test	test_ie	Test IE Browser	Test IE Browser compatibility

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VA MPN Form Runner Delete Copy Create New Form

The user then clicks **Copy** (circled, Figure 22) and a copy of the selected form is created. Note the **Created** and **Modified** fields at the far left of Figure 23. Notice that there are now new **Created** and **Modified** fields (circled in Figure 23) showing the time when the form was copied to indicate that this form is the copy. The user may then open the copied form and proceed with the desired changes. When finished, it **must** be saved under a new VA Form ID, Display Title, and Form Description (Refer to Troubleshooting section).

Note that a copied form will display the same Version number as the original form.

Figure 23: Copied Form on Summary Page

VAHealth Modernized Progress Notes

About Help Logout

Summary Page

Filter the table below by using the options here.

Organization VA Form ID Display Title Form Description

test

Filter Forms Close Filter Options

Showing 1 to 10 of 25 entries Show 10 entries

	Created	Modified	Current Version	Organization	VA Form ID	Display Title	Form Description
<input type="checkbox"/>	January 29, 2015 16:35:06	January 29, 2015 16:35:06	Not Published	test	form_for_User Manual	Form for User Manual	This is a test form for the User Manual
<input type="checkbox"/>	January 22, 2015 10:49:34	January 22, 2015 12:01:56	1	test	test-mb	test	test
<input type="checkbox"/>	January 21, 2015 13:19:36	January 22, 2015 10:47:46	Not Published	test	form-control-val	Form control validation	Form control validation
<input type="checkbox"/>	January 2, 2015 07:21:09	January 2, 2015 07:21:09	Not Published	test	refresh_lib	Library Refresh	Refresh the library
<input type="checkbox"/>	December 10, 2014 15:54:36	December 16, 2014 11:43:07	Not Published	test	test	test	test
<input type="checkbox"/>	November 24, 2014 15:44:15	November 24, 2014 15:44:15	Not Published	test	test_lm_1	Test LM Form 1	Test LM Form 1
<input type="checkbox"/>	November 14, 2014 15:16:37	January 28, 2015 13:45:04	Not Published	test	form_for_User Manual	Form for User Manual	This is a test form for the User Manual
<input type="checkbox"/>	November 14, 2014 15:16:36	January 7, 2015 15:07:08	1	test	test-pncsf-1123	Test Session Timer	Test Session Timer.
<input type="checkbox"/>	October 27, 2014 08:18:01	December 1, 2014 15:13:59	1	test	test-pncsf-1123	Test Session Timer	Test Session Timer.
<input type="checkbox"/>	September 19, 2014 14:17:40	December 2, 2014 13:15:40	1	test	us-test-1	Form builder test 1	Usability Testing

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VA MPN Form Runner Delete Copy Create New Form

4.1.4 Deleting Forms

To **Delete** a form, the user uses a very similar set of commands. The user searches for the form, and selects it as described above. Once the form to be deleted is selected, the user clicks the **Delete** button. A **Confirm Deletion** warning box appears as shown in Figure 24. When **Yes** is clicked, the form is deleted from the Summary Page.

Note: A record of the form is kept in the database, but it is not available to the user if Form Builder. It is still accessible by a provider type user from the Form Runner side and existing form instances continue to be usable – in fact new form instances can be created based on the template that has just been deleted.

Once the **Delete** button is clicked, the Summary Page will appear without it as shown in Figure 25.

Figure 24: Confirm Deletion Warning

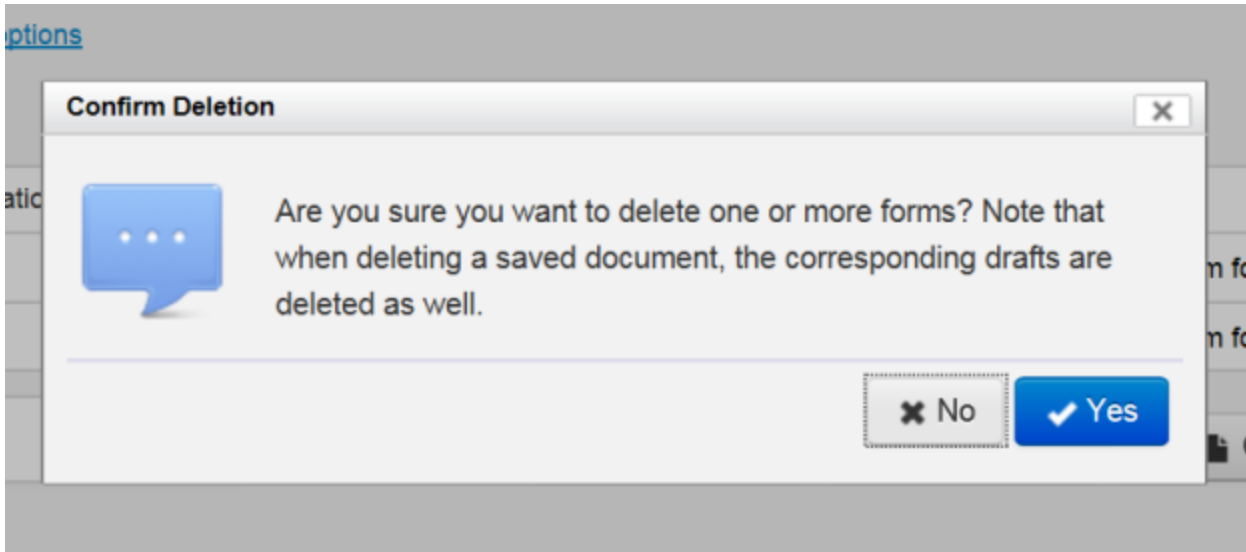


Figure 25: Summary Page after Form Deletion

	Created	Modified	Organization	VA Form ID	Display Title	Form Description
<input type="checkbox"/>	Jul 18	Jul 31	test	form_for_User Manual	Form for User Manual	This is a test form for the User Manual


1 to 1 of 1
Home
Delete
Copy
Create New Form

4.1.5 Creating a New Form in the Form Editor

The Form Editor, as discussed previously, is where the user adds information and functionality to the new form. To create a new form, the user begins by clicking the **Create New Form** button on the Summary Page. As shown below, a popup will appear with four required fields listed: **Organization**, **VA Form ID**, **Display Title**, and **Form Description**. These are required fields and must be entered to continue. The acceptable parameters for naming forms are shown in gray below each field. Invalid entries will display with error messages in red text instead of the parameters.

Figure 26: VA MPN Form Builder Popup

Enter the following information used to define and describe the form.



*** Organization:**

Select a value available from the Organization dropdown. This value will be used to determine access to and structuring of forms.

*** VA Form ID:**

Enter lowercase letters, numbers, dashes, or underscores (e.g., "health_record" or "claim" or "21-0960a_1"). Maximum of 20 characters with no spaces allowed.

*** Display Title:**

The text displayed to identify the title displayed on the form (e.g., Ischemic Heart Disease (IHD)).

*** Form Description:**

The text displayed that defines the purpose of the form.


or

Note: This type of alert is widely used in the application. Select the required Organization from the list shown in the dropdown menu. If the user attempts to bypass this selection, an error message will appear stating, "This is a required field. Select a value from the Organization dropdown." As shown in, once an Organization is selected, the asterisk next to the required field will turn from red to gray (Figure 27 and Figure 28). An attempt to bypass the Organization pulldown menu will cause the system to show the "This is a required field. Select a value from the Organization dropdown" error as shown in Figure 27.

Important: Before a form can be created, an ID must be entered. It is **critical** that the ID be unique. If, for example, you are building a PTSD Initial Evaluation exam form, a proper form ID might be "PTSDINIT." This would distinguish this form from a possible PTSD Follow-up form.

Figure 27: Pulldown Organization Selection Showing Red Asterisk

Enter the following information used to define and describe the form.



*** Organization:**

Select an Option:

This is a required field. Select a value from the Organization dropdown.

Select a value available from the Organization dropdown. This value will be used to determine access to and structuring of forms.

*** VA Form ID:**

Enter lowercase letters, numbers, dashes, or underscores (e.g., "health_record" or "claim" or "21-0960a_1"). Maximum of 20 characters with no spaces allowed.

*** Display Title:**


The text displayed to identify the title displayed on the form (e.g., Ischemic Heart Disease (IHD)).

*** Form Description:**

Summary Page Create New Form Test Publish

Figure 28: Pulldown After Organization Selection Showing Gray Asterisk

Enter the following information used to define and describe the form.



*** Organization:**

Select a value available from the Organization dropdown. This value will be used to determine access to and structuring of forms.

*** VA Form ID:**

This is a required field. Enter only lowercase letters, numbers, dashes, or underscores. Maximum of 20 characters with no spaces allowed.

Enter lowercase letters, numbers, dashes, or underscores (e.g., "health_record" or "claim" or "21-0960a_1"). Maximum of 20 characters with no spaces allowed.

Type in a valid **VA Form ID** (Figure 28). This field is required. This field also has a 20 character restriction and requires the user to enter only lowercase letters, numbers, dashes, or underscores. If the user attempts to bypass this field or enters information that does not fit the criteria, an error message (Figure 28) saying "This is a required field. Enter only lowercase letters, numbers, dashes, or underscores. Maximum of 20 characters with no spaces allowed." Once data is entered in each field, the asterisk next to the field will turn from red to gray. If there is no entry or an improperly formatted entry, the red asterisk will remain until the entry is corrected (Figure 29).

Note: VA Form ID and Title of the form should be unique values.

Figure 29: VA Form ID Field with Properly Formatted Entry

* Display Title:

The text displayed to identify the title displayed on the form (e.g., Ischemic Heart Disease (IHD)).

Figure 30: VA Form ID Field with Improperly Formatted Entry

* VA Form ID:

This is a required field. Enter only lowercase letters, numbers, dashes, or underscores. Maximum of 20 characters with no spaces allowed.

Enter lowercase letters, numbers, dashes, or underscores (e.g., "health_record" or "claim" or "21-0960a_1"). Maximum of 20 characters with no spaces allowed.

Figure 31: VA Form ID Field with No Entry

* VA Form ID:

This is a required field. Enter only lowercase letters, numbers, dashes, or underscores. Maximum of 20 characters with no spaces allowed.

Enter lowercase letters, numbers, dashes, or underscores (e.g., "health_record" or "claim" or "21-0960a_1"). Maximum of 20 characters with no spaces allowed.

Type in a valid Display Title (Figure 32). This field is required and there are no character limits or restrictions. If the user attempts to bypass this field, an error message saying "This is a required field. Enter a Display Title" Once data is entered in each field, the asterisk next to the field will turn from red to gray. If there is no entry or an improperly formatted entry, the red asterisk will remain until the entry is corrected.

Note: VA Form ID and Title of the form should be unique values.

Figure 32: Display Title Field with Text

* Display Title:

The text displayed to identify the title displayed on the form (e.g., Ischemic Heart Disease (IHD)).

Figure 33: Form Description Field Without Text

* Form Description:

The text displayed that defines the purpose of the form.

Type in a valid Form Description (Figure 33). This is a required field and there are no character limits or restrictions. If the user attempts to bypass this field, an error message saying "This is a required field. Enter a Form Description." Once data is entered in each field, the asterisk next to the field will turn from red to gray. If there is no entry or an improperly formatted entry, the red asterisk will remain until the entry is corrected (Figure 35).

Figure 34: Form Description with Accepted Text

* Form Description:

This is a form about Hypertension

The text displayed that defines the purpose of the form.

Figure 35: Form Description with No Text

* Form Description:

This is a required field. Enter a Form Description.

The text displayed that defines the purpose of the form.

The user may either click **Continue** or **Close**.

Note: The user will not be able to continue if there are error messages remaining.

The **Continue** button will take the user to the next screen where the user can create the form for the template by adding components from the toolbox to the form. The **Close** button closes the popup without saving the entered data. In this case, the form is named Form for User Manual. Click **Continue**.

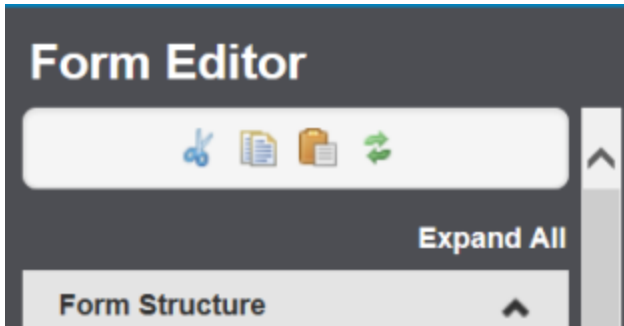
Figure 36: Newly Created Form

Figure 36 shows a newly created form with an unnamed section (arrow) added by default to all form templates by VA MPN Form Builder. In addition, some Date and Time fields have been manually added. (These controls will be covered later in this manual.) The Menu on the left shows all of the possible functions provided for the user. The Form Structure Menu seen in Figure 26 is automatically opened to show the choices available.

4.1.6 Form Editor – Cut, Copy, Paste, and Reload Toolbox

The Form Editor is a powerful tool that enables the user to perform many typically needed functions when creating or modifying forms. Note the icons at the top left, just above the Form Structure Menu (Figure 37).

Figure 37: Icons for Cut, Copy, Paste, and Reload Toolbox



Note: The **ctrl-V** and **ctrl-Z** commands commonly used in Windows are **not** supported.

The **Cut** and **Paste** commands in the App **must** be used. These icons allow the user to access basic functions by clicking on them (circle, Figure 37). From left to right, they are **Cut**, **Copy**, **Paste**, and **Reload Toolbox**.

The **Cut** function allows the user to cut sections or grids from the form. The **Copy** function allows the user to copy a given section or grid and place it where desired. The **Paste** function allows the user to paste a cut section where desired.

Reload Toolbox has a special function. Once a form has been completed, the user makes changes to a Reusable Form Part and a document template that references that Reusable Form Part is opened in Form Editor, using the Reload Toolbox control will cause the changed definition of the Reusable Form Part to be applied to the currently loaded template.

When the changes made to the Template are saved and published – at that point, all Form Instances that reference the published Form version will be updated automatically. This eliminates the need to update every filled in form in Form Runner.

There is also an **Expand All** link (circled in Figure 38) which when clicked will open all of the Menus at once. When **Expand All** is clicked, all of the Menus open at once (Figure 39). There are menus that require use of the scroll bar to view. Each individual section of the Menu Bar may be expanded or collapsed, if desired. Figure 39 shows the entire menu open. Due to the size of the menu, it is shown in multiple graphics in the order

in which the menus are displayed.
Figure 38: All Menus Closed, Expand All Command Visible

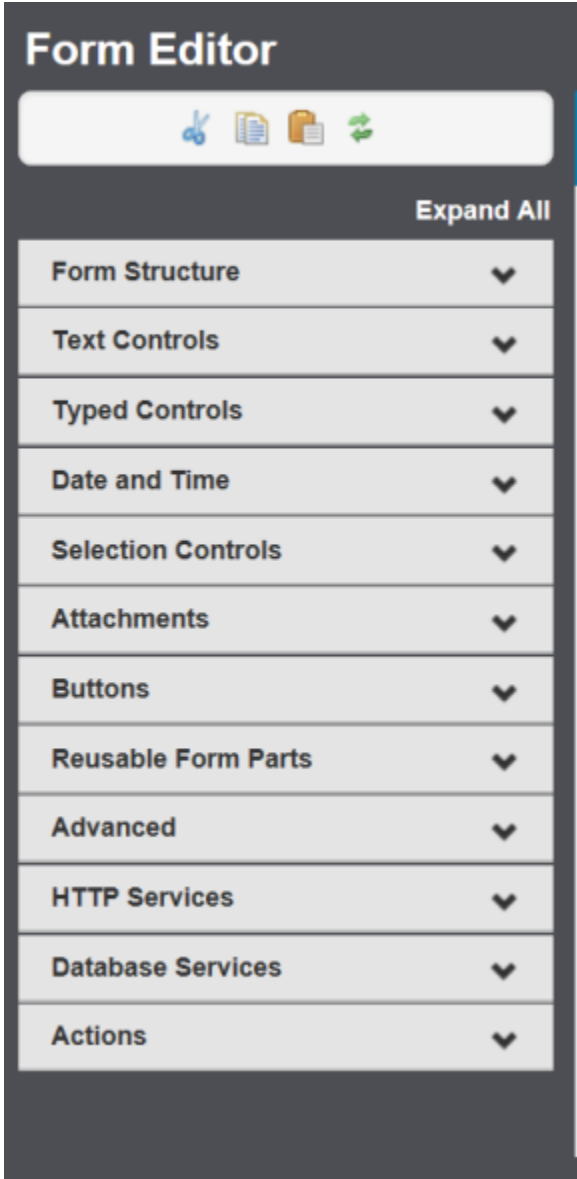


Figure 39: Result of "Expand All" Command Clicked

Form Structure

New Section

New Grid

New Repeated Grid

Text Controls

Input Field

Text Area

Text Output

Password Field

Formatted Text

Typed Controls

Email Address

US Phone Number

Number

Currency

US State

Date and Time



Date



Time



Date and Time



Dropdown Date



Fields Date

Selection Controls



Dropdown Menu



Radio Buttons



Checkboxes



Scrollable List



Boolean Input



Scrollable Checkboxes



Dynamic Data Dropdown



Autocomplete

Attachments



Image



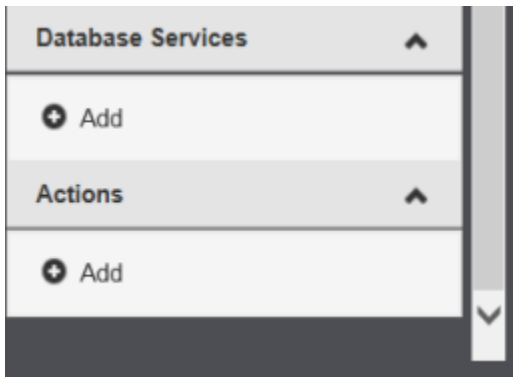
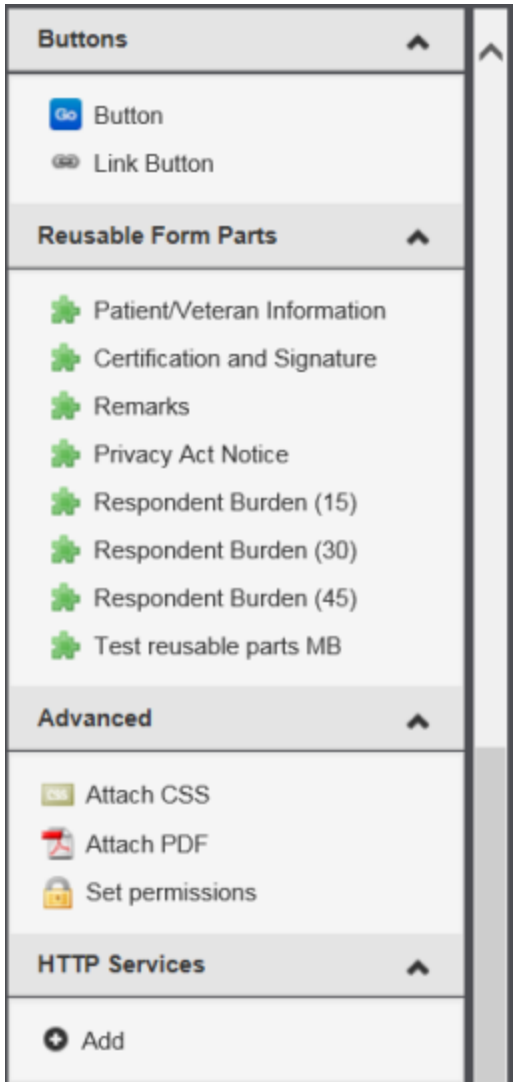
Image Attachment



File Attachment



Image Annotation



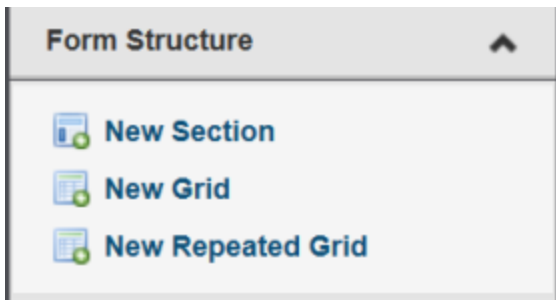
There are additional icons at the top right of the screen (Figure 40).
Figure 40: Icons for Language, Add Language, Edit Source, and Form Settings



These icons are, from left to right, **Current Display Language**, **Add Language**, **Edit Source**, and **Form Settings**.

- **Current Display Language** shows the user what language is currently used to display the form.
- **Add Language** allows the user to add another language to the software via a dropdown menu.
- **Edit Source** allows the user access to the HTML5 code in the form for direct editing by advanced users.
- **Form Settings** reopens the Required Fields popup or review or changes.

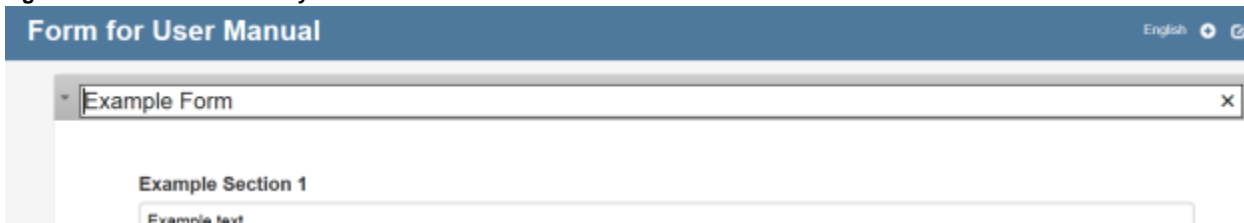
Figure 41: Form Structure Menu



- **New Section** allows the user to add a new section to the new form.
- **New Grid** allows the user to add a new grid to the form. A new grid is needed when the user wants to change the number of columns in a section (e.g., from one column to two or from three columns to two). Grids are used to quickly and neatly lay out forms with multiple fields, such as Patient/Veteran Name, Date of Birth, Phone Number, etc. selected from the Main Menu.
- **New Repeated Grid** allows the user to repeat a previously used grid on the form to save time and effort.

Clicking on the Untitled Section reveals the field where the user enters the label for the Section (arrow, Figure 42).

Figure 42: Section Label Entry Field



over the untitled section reveals several icons (Figure 43).

Figure 43: Section Field Functions



Along the top and sides of the section, six icons are revealed:

- **Add a Column Above (1)**
- **Add a Column Below (2)**
- **Add a Column to the Left (3)**
- **Add a Column to the Right (4)**
- **Delete Column (5)**
- **Gear (6)**

When clicked, the icons at the left of the Untitled Section allow the user to **Add a Column Above** (1) or **Add a Column Below** (2) the original column.

When clicked, the icon (3) will **Add a Column to the Left** of the current column. The icon (4) will **Add a Column to the Right** of the current column.

The icon on the left (5) will **Delete the Column to the Left** of the current column. The icon on the top (6) will **Delete the Column Above** the current column.

Along the bottom of the Untitled Section, a clickable field is available to type in a hint about the field, if needed. This is useful in cases where the user may be interrupted and have to return to complete building the form later, as well as for hints for the eventual VA MPN Form Runner user about what data is expected in the field.

4.2 Basic Grid Use

Grids are used to keep forms orderly and lined up accurately. Figure 44 shows the result when **New Grid** is clicked. Note the icons on the left of the new grid. The top icon allows the user to **Delete** the new grid, and the **X** icons allow the user to duplicate the new grid above or below the current grid. Grids are used to quickly and neatly lay out forms with multiple fields, such as Patient/Veteran Name, Date of Birth, Phone Number, etc. selected from the Main Menu.

Figure 44: New Grid



For example, the sample grid in Figure 45 has two text areas, a US State typed control, an Email Address typed control, and a US Phone Number typed control all grouped together in the same grid.

Figure 45: Sample Grid with Vertical Multiple Controls and Fields

Figure 46: Close Up Showing Insert Column Icon

Figure 46 shows a close up of the page area to the left and above of the column you wish to copy. Clicking the **X** icon indicated by the oval duplicates the column.

In Figure 47, the user has clicked the **X** icon in the top right of the two text areas to allow room for another set of items to the right. The user then selected and placed a Date field and a Time field from the Main Menu on the left (arrows).

Figure 47: Adding Multiple Items Side-by-Side to a Form

Example Form

Example Section 1

Example text

This is a Text Area

This is a Date field.

This is a Text Area.

This is a Time field.

This is a US State typed control.

This is an Email Address typed control.

This is a US Phone Number typed control.

When the **Text Controls Menu** on the left (just below **Form Structure**) is clicked, another set of controls are revealed (Figure 47).

Figure 48: Text Controls Menu

Text Controls

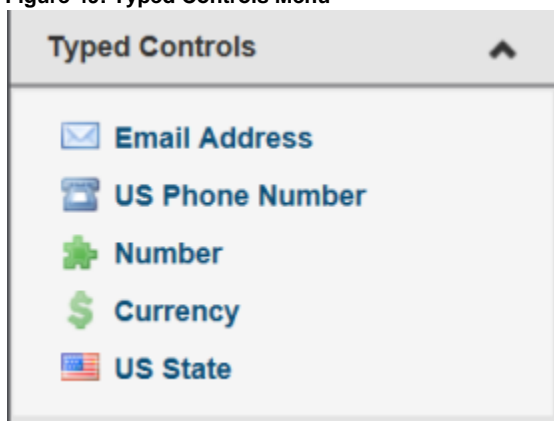
- Input Field
- Text Area
- Text Output
- Password Field
- Formatted Text

- **Input Field** allows the user to add new Input Fields to Sections.
- **Text Area** allows the user to add new Text Fields to Sections.
- **Text Output** allows the user to place a text field for system responses to entries.
- **Password Field** allows the user to add a field for password protecting created forms.
- **Formatted Text** opens a simple word processor with basic functions such as Bold and Italic fonts, numbered and bulleted lists, and quotation marks.

- **Explanation** opens a field for the user to add explanatory text to a form.

The **Typed Controls Menu** is immediately below the **Text Controls Menu** (Figure 49).

Figure 49: Typed Controls Menu



These fields allow the user to add fields for basic entry tasks such as **Email Address**, **US Phone Number**, **Numbers**, **Currency**, and **US State**, if required.

The **Date and Time Menu** (Figure 50) is located immediately under the **Typed Controls Menu**. This menu allows the user to add fields for

- **Date Field With Calendar** (Figure 51)
- **Time** (Figure 52)
- **Date and Time Field With Calendar and Clock** (Figure 53)
- **Dropdown Date** (Figure 54).

Note that the Date fields will allow the user to enter dates previous to the current date, as a Veteran may present with a pre-existing diagnosis.

The **Calendar** icon (Figure 51, Figure 53) will open a menu which the user may select the date desired. The **Clock** icon (arrow in Figure 52 and Figure 53) will open a menu which the user may use to select the time desired.

Figure 50: Date and Time Menu

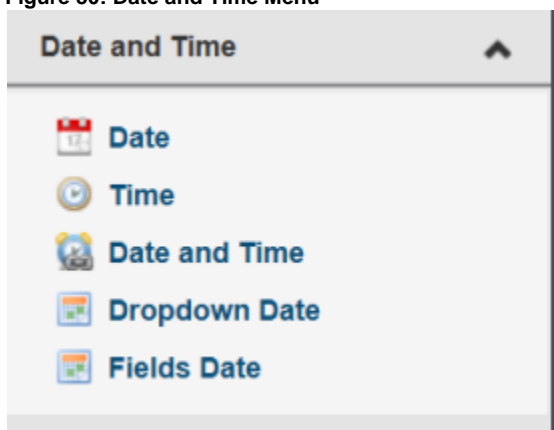


Figure 51: Date Field with Calendar

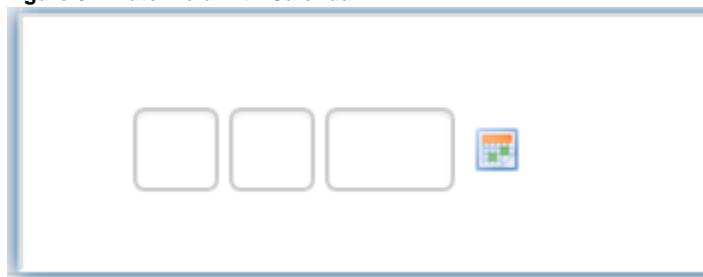


Figure 52: Time Field with Clock

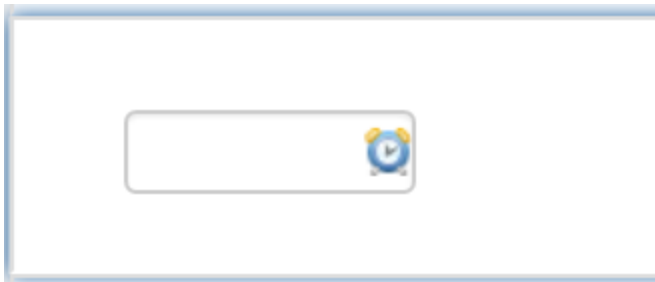


Figure 53: Date and Time Field with Calendar and Clock

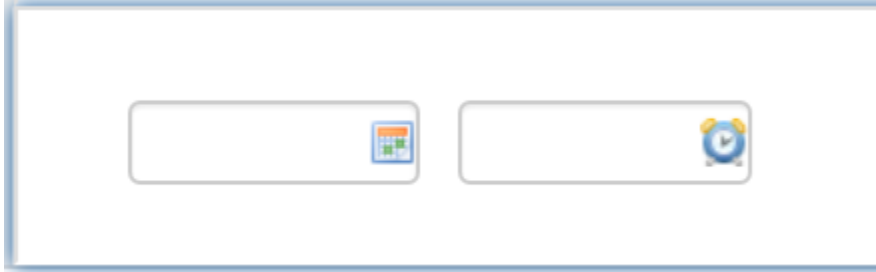


Figure 54: Dropdown Date Field

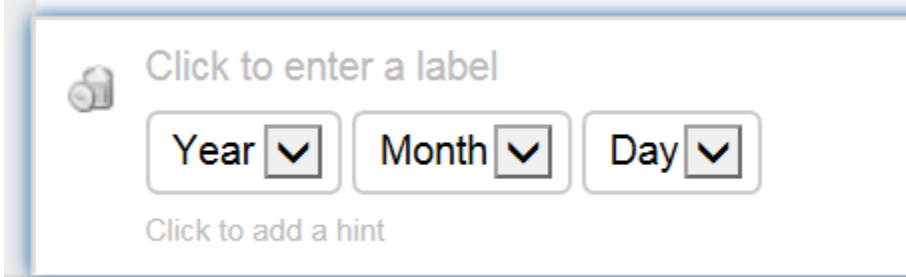
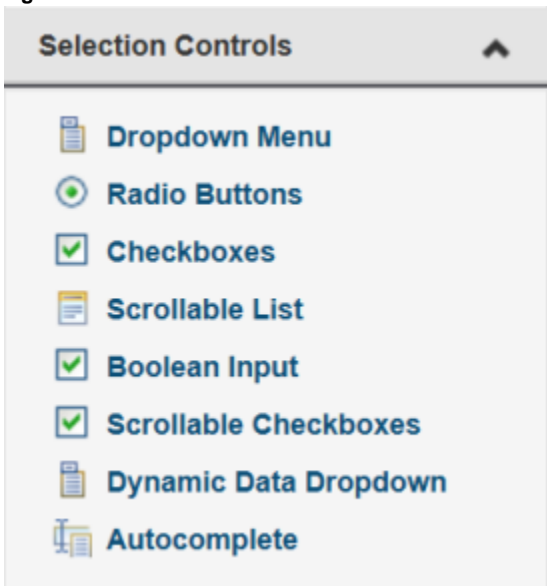


Figure 55: Selection Controls Menu



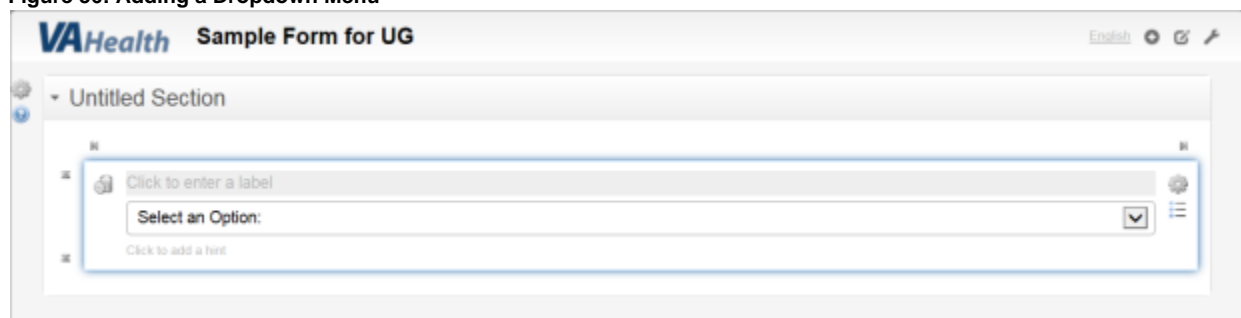
The **Selection Controls Menu** is located on the left immediately below the **Date and Time Controls** (Figure 55). As enumerated above, it contains the controls for adding

- Dropdown Menus
- Radio Buttons
- Checkboxes
- Scrollable Lists
- Boolean Input
- Scrollable Checkboxes
- Dynamic Data Dropdown Menu
- Autocomplete

Each will be described in order.

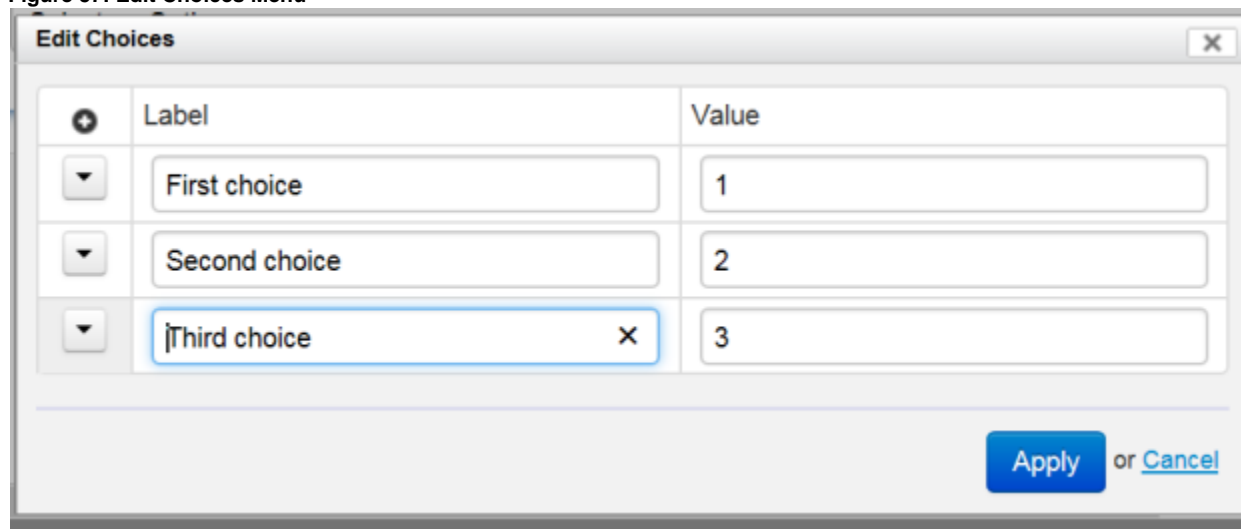
Dropdown Menu allows the user to add a dropdown menu to the form where the user may select from options pre-entered in the form. It allows a first, second, and third choice for selection, by clicking on the **List** icon shown by the open arrow in Figure 56.

Figure 56: Adding a Dropdown Menu

The screenshot shows a web form titled "VAHealth Sample Form for UG". Below the title is a section labeled "Untitled Section". Inside this section is a form element with a label "Click to enter a label" and a dropdown menu. The dropdown menu is currently open, showing the text "Select an Option:" and a list of three choices: "First choice", "Second choice", and "Third choice". The "List" icon (an open arrow) is visible on the right side of the dropdown menu.

When the List icon is clicked the **Edit Choices** menu shown in Figure 57 is displayed. This menu allows the user to enter text for the choices. More choices may be added by clicking the down arrow in the first column and selecting additional options. The user may also add a row before or after any of these. Once complete, the user may click **Apply** to save them or **Cancel** to delete them and return to the previous screen.

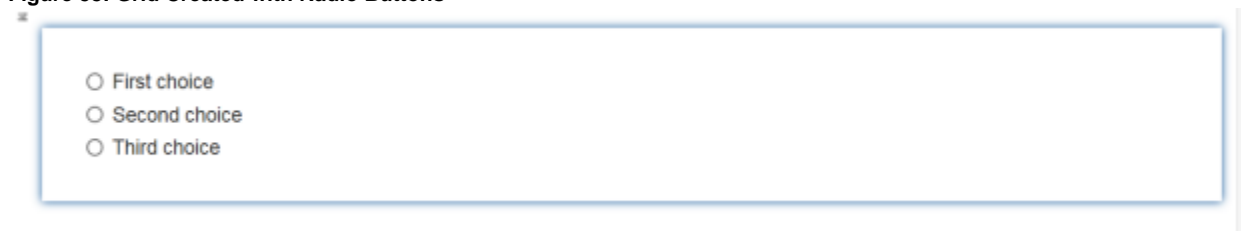
Figure 57: Edit Choices Menu

The screenshot shows the "Edit Choices" menu. It contains a table with three columns: a column for adding or removing rows (indicated by a plus or minus icon), a "Label" column, and a "Value" column. The table has three rows: "First choice" with value "1", "Second choice" with value "2", and "Third choice" with value "3". The "Third choice" row is highlighted. At the bottom right of the menu are buttons for "Apply" and "Cancel".

	Label	Value
+	First choice	1
-	Second choice	2
-	Third choice	3

The **Radio Buttons** command (Figure 58) allows the creation of a box with radio buttons for three choices programmatically created. The user fills in the necessary text for the choices.

Figure 58: Grid Created with Radio Buttons

The screenshot shows a form grid with three radio buttons. The first radio button is selected. The text "First choice", "Second choice", and "Third choice" are listed next to the radio buttons respectively.

☒ First choice
☐ Second choice
☐ Third choice

The **Check**

boxes command (Figure 59) allows the creation of a box with checkboxes for three choices programmatically created. The user fills in the necessary text for the choices. The user can use the **Edit Choices** option with the added checkboxes to add more than three options, if desired. Figure 59 shows the Edit Choices option with an additional choice added.

Figure 59: Edit Choices Menu

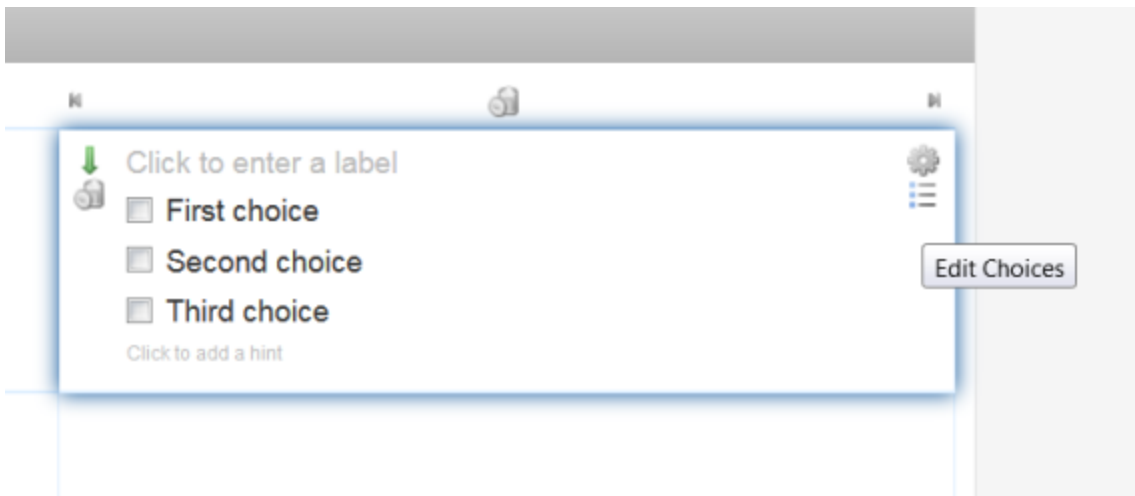


Figure 60: View of Edit Choices with an Additional Choice Added

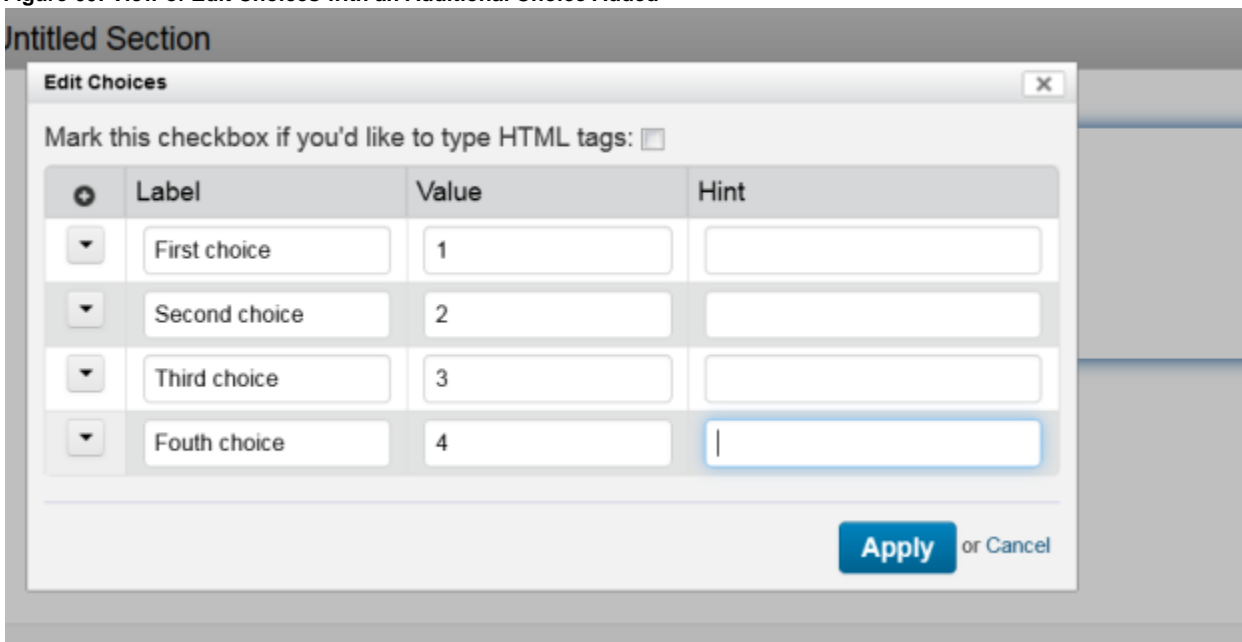


Figure 61: Grid Created with Checkboxes

- ☐ First choice
- ☐ Second choice
- ☐ Third choice

The **Boolean Input** command (Figure 62) allows the creation of a grid to accept Boolean inputs. There is a field for a label as well as a Hint box for the user to enter useful information.

Figure 62: Boolean Input

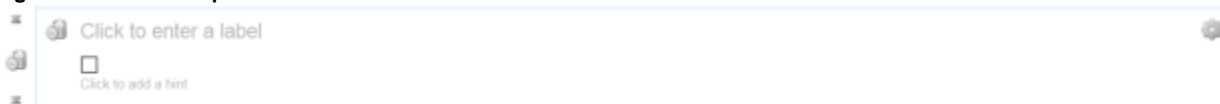
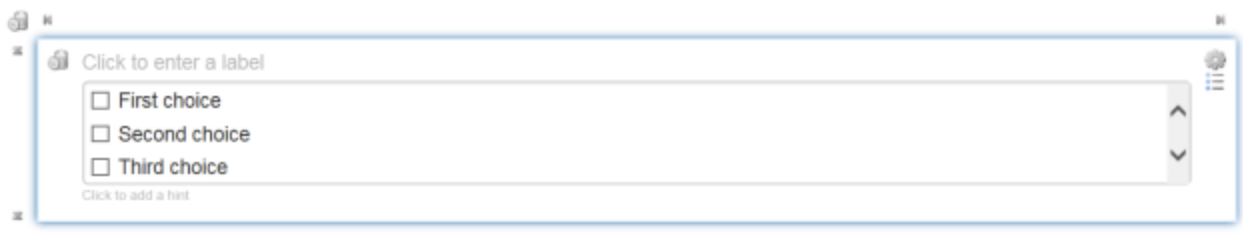


Figure 63: Scrollable Checkboxes



The **Scrollable Checkboxes** (Figure 63) command allows the user to create a set of choices with a scrollbar, which is useful when the text necessary is longer than what can be accommodated by the previous Checkboxes command.

The **Dynamic Data Dropdown** (Figure 64) command allows the user to create a dropdown menu with fields to set **Calculated Value**, **Initial Value**, **Visibility**, and **Read-Only**. Each field has a preprogrammed hint as to what type of expression is expected in each field (**XPath** or **Boolean XPath**).

Figure 64: Dynamic Data Dropdown

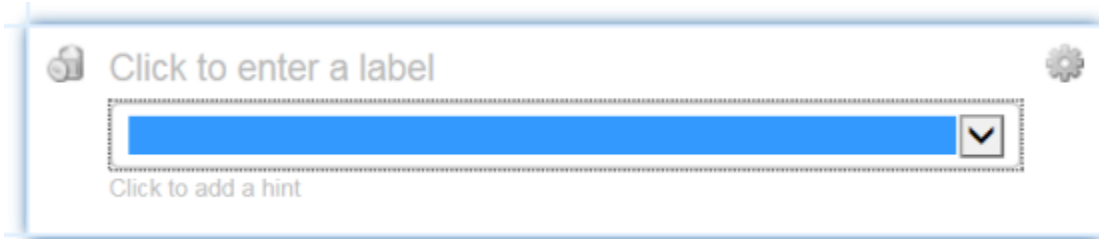
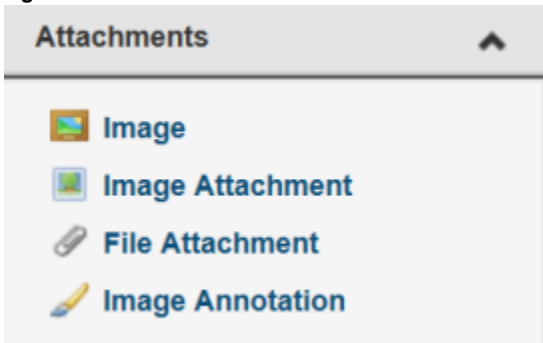
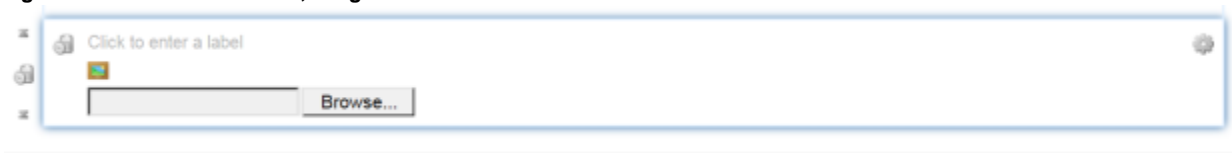


Figure 65: Attachments Menu



The **Attachments Menu** allows the eventual VA MPN Form Runner user to attach images or files to the form, as well as allowing for annotation of the images.

Figure 66: Attachments Menu, Image Screen



The **Attachments Menu, Image Screen** (Figure 66) allows the eventual VA MPN Form Runner user to add a field for adding an image to the form. The **Browse** button allows the VA MPN Form Runner user to find and select an image from saved images on their computer and add it to the form. Functionality also includes a field where the eventual VA MPN Form Runner user may type in a label for the image selected.

Figure 67: Attachments Menu, Image and File Attachment, File Annotation

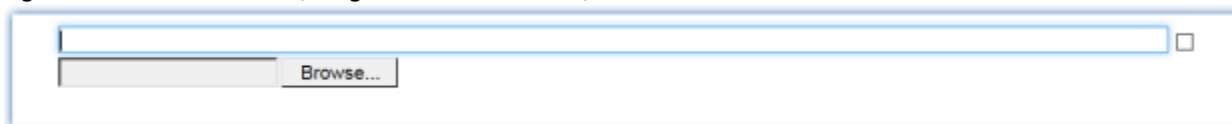


Image Attachment, **File Attachment** and **File Annotation** use identical menus.

The next Menu on the left is the **Button Menu** which allows VA MPN Form Builder to add and label buttons for the form (Figure 68).

Figure 68: Buttons Menu



Figure 69: Buttons Menu, Go Button Command Selected



The **Go Button** (Figure 68-top, Figure 69) allows the user to place a blue action button (for example, a "Save" button) on a form that can be labeled by the user.

The **Link Button** (Figure 68-bottom) **Menu** allows the VA MPN Form Builder user to link the button just created to a hyperlink. The user enters the hyperlink URL in the field provided. All other controls work as described previously.

Figure 70: Buttons Menu, Link Button Command Selected

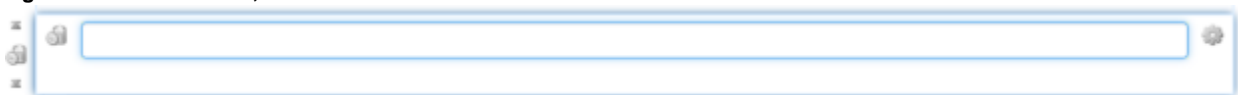
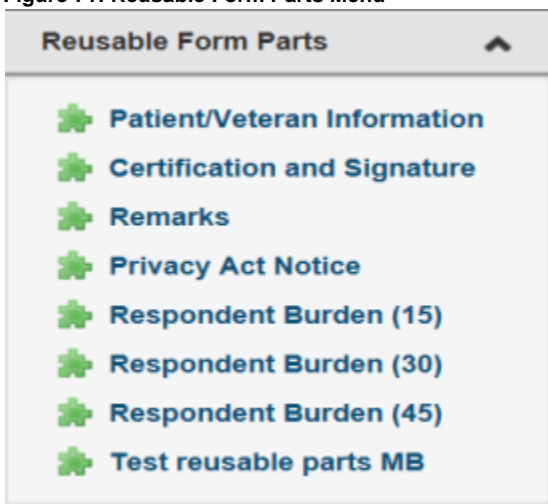


Figure 71: Reusable Form Parts Menu



The **Reusable Form Parts Menu** (Figure 71) is located immediately below the Buttons Menu on the left. The parts are standardized components which can be added to a form, if desired and may be reused across multiple forms. They are the:

- **Patient/Veteran Information** block
- **Certification and Signature** block
- **Remarks** block
- **Privacy Act Notice** block
- **Respondent Burden** block

Figure 72: Reusable Form Parts Menu, Patient/Veteran Information Block

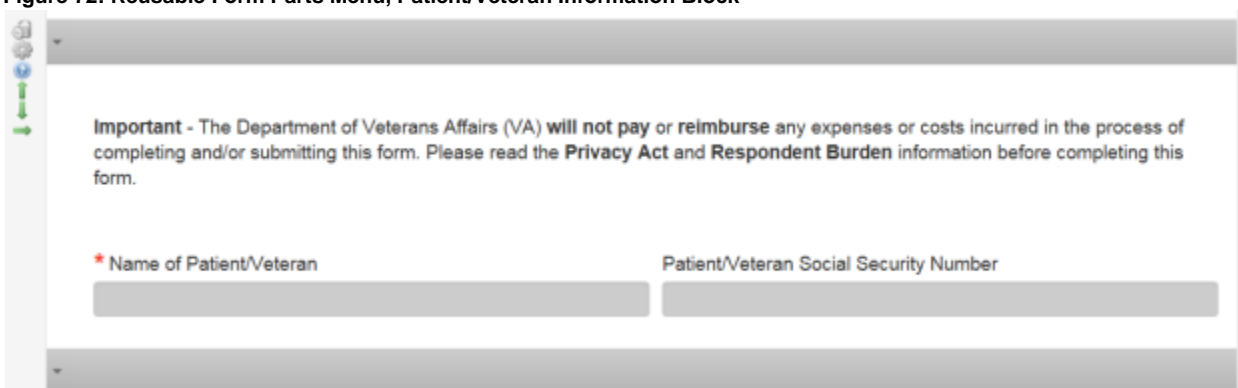


Figure 73: Reusable Form Parts Menu, Certification Text Block

Certification: To the best of my knowledge, the information contained herein is accurate, complete, and current.

Signature _____ Printed Name _____ Date Signed _____

Phone Number _____ Medical License Number _____ Address _____

Note: VA may request additional medical information, including additional examinations, if necessary to complete VA's review of the Veteran's application.

Important: Please fax the completed form to (VA Regional Office Fax No.) _____

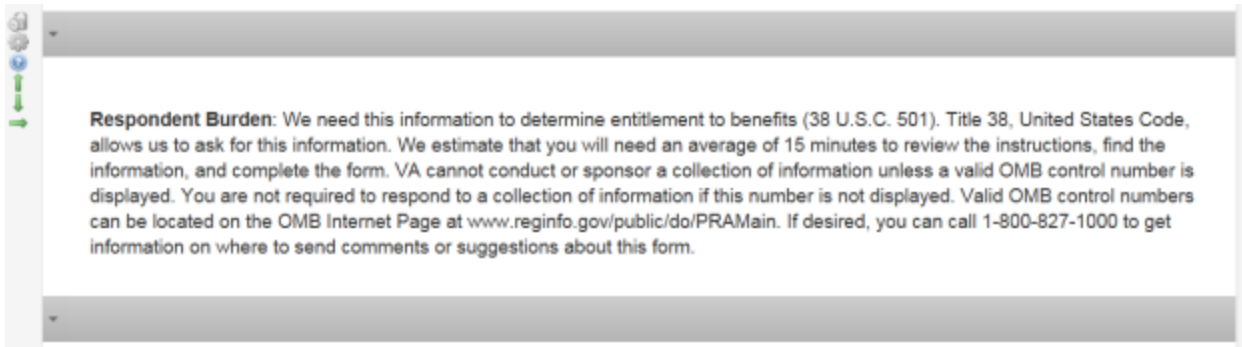
Figure 74: Reusable Form Parts Menu, Remarks Text Block

Remarks (if any)

Figure 75: Reusable Form Parts Menu, Privacy Act Notice Text Block

Privacy Act Notice: VA will not disclose information collected on this form to any source other than what has been authorized under the Privacy Act of 1974 or Title 38, Code of Federal Regulations 1.576 for routine uses (i.e., civil or criminal law enforcement, congressional communications, epidemiological or research studies, the collection of money owed to the United States, litigations in which the United States is a party or has an interest, the administration of VA programs and delivery of VA benefits, verification of identity and status, and personal administration) as identified in the VA system of records, 58/VA21/22/28, Compensation, Pension, Education and Vocational Rehabilitation and Employment Records - VA, published in the Federal Register. Your obligation to respond is voluntary. VA uses your SSN to identify your claim file. Providing your SSN will help ensure that your records are properly associated with your claim file. Giving us your SSN account information is voluntary. Refusal to provide your SSN by itself will not result in the denial of benefits. VA will not deny benefits for refusing to provide his or her SSN number unless the disclosure of the SSN is required by a Federal Statute of law prior to January 1, 1975, and still in effect. The requested information is considered relevant and necessary to determine maximum benefits under the law. The responses you submit are considered confidential (38 U.S.C. 5701). Information submitted to verification through computer matching programs with other agencies.

Figure 76: Reusable Form Parts Menu, Respondent Burden (15) Text Block



Note: There are three different Respondent Burden Text Blocks: 15 minutes, 30 minutes, and 45 minutes. The text of the blocks is identical except for the time required. The user must use caution to ensure the use of the correct text box.

The next Menu on the left is the **Advanced Menu**. (This menu is not used in this iteration of Form Builder and Figures 77 and 78 are intentionally left blank.)

Figure 77: Advanced Menu
Intentionally Left Blank

Figure 78: Attach CSS
Intentionally Left Blank

Figure 79: Attach a PDF Template File

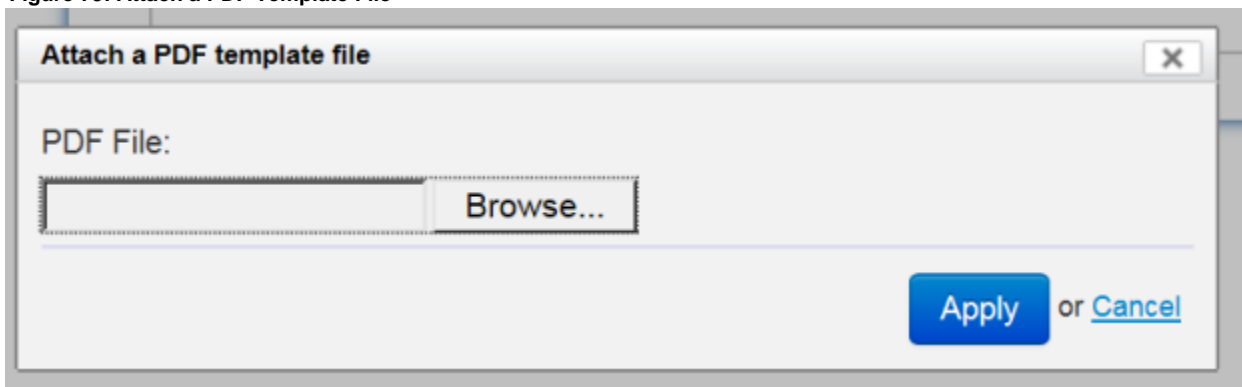
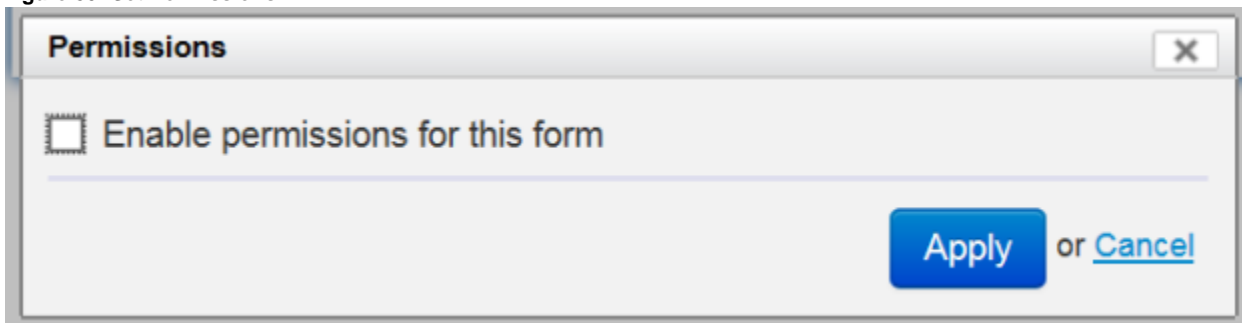


Figure 80: Set Permissions



The **HTTP Services Menu** (Figure 81) allows the VA MPN Form Builder to open the **HTTP Service Editor** (Figure 82) by clicking **Add**. This editor allows the VA MPN Form Builder to set up HTTP services for the form with fields to type in the **Service Name** and **Resource URL**. The **Method** can be specified as **Get**, **Post**, **Put**, or **Delete** by using the Method dropdown menu. **Serialization** may be set as either **XML** or **HTTP Form**. Checkboxes indicate whether this service is a **SOAP service** and whether **HTTP Authentication** is required. At the bottom, a manual entry box is provided for entering the **Request Body** as **XML data with** or **without a SOAP envelope**. Buttons at the bottom allow the VA MPN Form Builder to **Test**, **Save**, or **Cancel** the entry.

Figure 81: HTTP Services Menu

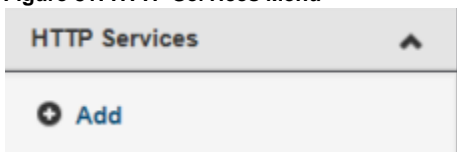
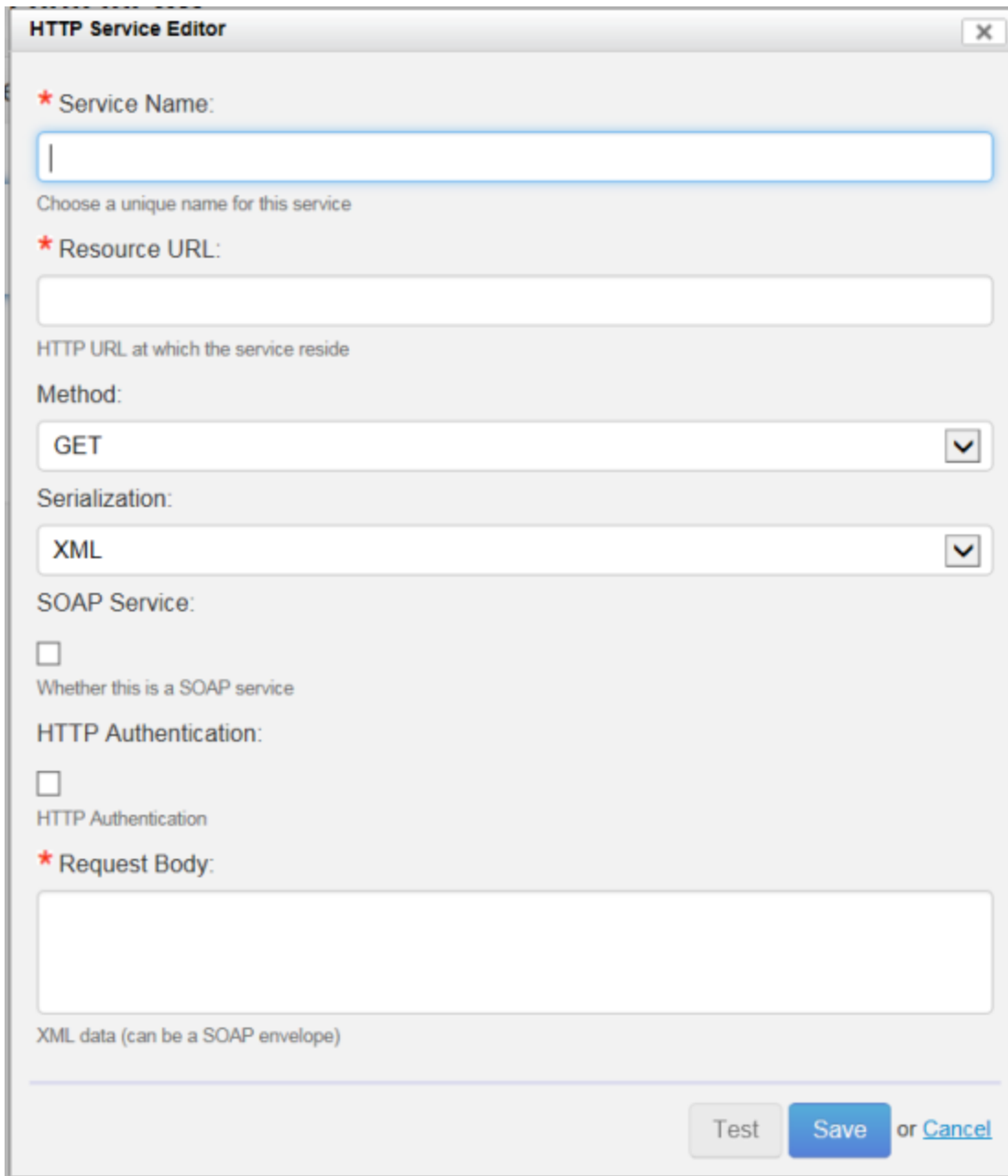


Figure 82: HTTP Service Editor



The screenshot shows a dialog box titled "HTTP Service Editor" with a close button (X) in the top right corner. The form contains several fields and options:

- * Service Name:** A text input field with a blue border. Below it is the instruction "Choose a unique name for this service".
- * Resource URL:** A text input field. Below it is the instruction "HTTP URL at which the service reside".
- Method:** A dropdown menu currently showing "GET".
- Serialization:** A dropdown menu currently showing "XML".
- SOAP Service:** A checkbox that is currently unchecked. Below it is the instruction "Whether this is a SOAP service".
- HTTP Authentication:** A checkbox that is currently unchecked. Below it is the instruction "HTTP Authentication".
- * Request Body:** A large text input field. Below it is the instruction "XML data (can be a SOAP envelope)".

At the bottom right of the dialog, there are three buttons: "Test" (disabled), "Save" (active), and "or [Cancel](#)".

The Database Services Menu is located immediately below the HTTP Services Menu on the left (Figure 83). When the **Add** button is clicked, the **Add Database Services Editor** appears.

Figure 83: Database Services Menu

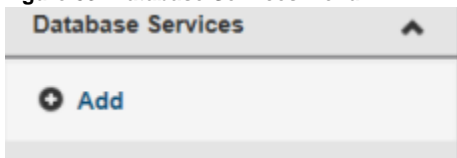


Figure 84: Add Database Service Editor

Database Service Editor

* Service Name:

Choose a unique name for this service

* Datasource:

JNDI datasource for this service

* SQL Query:

```
SELECT * FROM customers
WHERE first_name = <sql:param type="xs:string" select=""/>
```

SQL query which can contain placeholders for parameters

Save or Cancel

The Editor allows the VA MPN Form Builder user to type in the **Service Name**, **Datasource**, and a **SQL Query**, which allows placeholders for parameters.

The final Menu on the left is the **Actions Menu** (Figure 85). **This menu is not currently used in Form Builder.** For more information, see <http://wiki.orbeon.com/forms/doc/user-guide/form-builder-user-guide/database-services>

Figure 85: Actions Menu

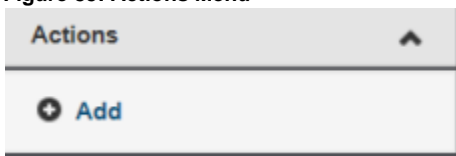


Figure 86: Add Actions Editor

4.3 Saving Forms

The user saves a form by clicking the **Save** button at the far right of the VA MPN Form Builder Form Creation screen (arrow, Figure 87).

Figure 87: VA MPN Form Builder Form Creation Screen, Save Button



Note that each time **Save** is clicked, the most current version of the form in progress is saved. The user who wishes to save more than one draft must save each of them with a unique name. The user may use any authorized device that can access VA MPN Form Builder to continue work on the form.

4.4 Publishing a Completed Form

Once the form is completed and saved, it must be **Published** so that VA MPN Form Runner users may use it. This is done by first saving any last-minute changes. Once this is done, the **Publish** button will become available on the Summary Page. Click the **Publish** button (Figure 88) to

publish your form to the Summary Page.
Figure 88: Command Menu With Publish Button Circled



Note that there are two possibilities when Publishing a form. If your form is being Published for the first time, Figure 89 will appear. If your form is being republished after changes, Figure 109 will appear to give the user the choice of overwriting the previous version.

Figure 89: Publish Popup Box – First Time Publishing

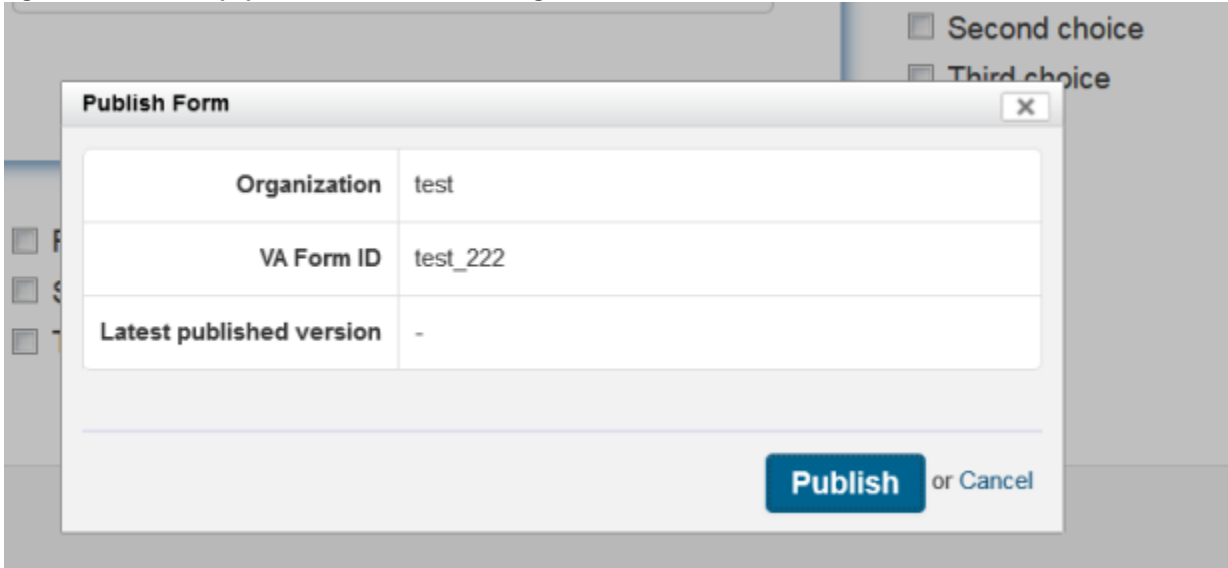
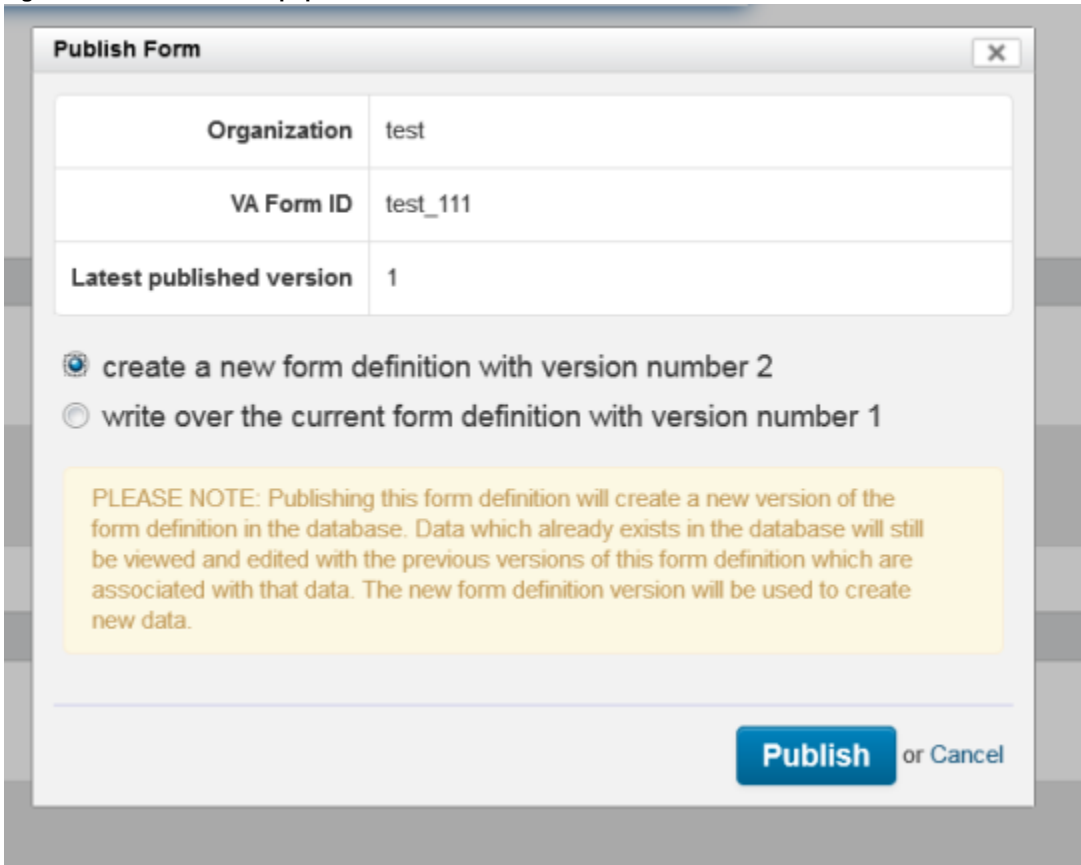


Figure 90: Publish Form Popup – Create a New Form or Write Over Current Form



4.5 Creating Reusable Form Parts

A **Reusable Form Part** is a special part of a form which is kept in the **Library**. These parts are standardized items which can be added to a form, if desired. Normal use of Reusable Form Parts is covered in Figure 71.

Note: Reusable form parts are used for new sections only. They cannot be used within a section that already exists. When you use them, you cannot add any additional information to the section.

To create a new Reusable Form Part, the user must first open and scroll through the Library to ensure that the form part desired has not been created yet. The Library is found on the VA MPN Form Builder Summary Page under the VA Form ID column (Figure 113).

If a Reusable Form Part needs a modification, the user selects it from the Library, makes the necessary changes, then Saves and Publishes it again. If the Reusable Form Part in question has been used in forms, updating it only requires that the user open that form and click on the Reload Toolbox icon (Figure 37) to update it. Once it is updated, Save the form again with the new Reusable Form Part.

Note: Only one Library is allowed per Organization.

Figure 91: Filtered Summary Page Showing the Library

VAHealth Modernized Progress Notes

About Help Logout

Summary Page

Filter the table below by using the options here.

Organization: test VA Form ID: Display Title: Library Form Description:

Filter Forms Close Filter Options

Showing 1 to 1 of 1 entries Show 10 entries

Created	Modified	Current Version	Organization	VA Form ID	Display Title	Form Description
January 2, 2015 07:21:09	January 2, 2015 07:21:09	Not Published	test	refresh_lib	Library Refresh	Refresh the library

Previous 1 Next

VA MPN Form Runner Delete Copy Create New Form

When opened, the Library will look something like Figure 92, showing all of the Reusable Form Parts available for use.

Figure 92: Reusable Form Parts Library Opened

VAHealth Modernized Progress Notes

About Help Logout

Form Editor

Expand All

- Form Structure
 - New Section
 - New Grid
 - New Repeating Grid
- Text Controls
- Typed Controls
- Date and Time
- Selection Controls
- Attachments
- Buttons
- Advanced
- HTTP Services
- Database Services
- Actions

Reusable Form Parts

Important: The Department of Veterans Affairs (VA) will not pay or reimburse any expenses or costs incurred in the process of completing and/or submitting this form. Please read the Privacy Act and Respondent Burden information before completing this form.

Name of Patient/Veteran: Patient/Veteran Social Security Number:

Certification and Signature

Certification: To the best of my knowledge, the information contained herein is accurate, complete, and current.

Signature: Printed Name: Date Signed:

Phone Number: Medical License Number: Address:

Note: VA may request additional medical information, including additional examinations, if necessary to complete VA's review of the Veteran's application.

Important: Please fax the completed form to (VA Regional Office Fax No.)

Summary Create New Form Test Publish Save

Note the scroll bar on the right side of Figure 93 (circled). Move this bar up and down with the mouse to see all of the form parts. The list may be long.

Figure 93: Reusable Form Parts Screen

After ensuring that a new Reusable Form Part must be created, the user clicks on the **Create New Form** button on the Command bar. The MPN VA Form Builder Popup opens and form creation is then the same process as a normal form. Remember to name the new Reusable Form Part with a simple descriptive name. It is important to remember that a Reusable Form Part **MUST** be a new section. It cannot be a new grid, though the new section may **CONTAIN** a new grid.

Note: The new Reusable Form Part will not appear in the Library until it has been both **Saved** and **Published**.

If a Reusable Form Part needs a modification, the user selects it from the Library, makes the necessary changes, then **Saves** and **Publishes** it again. If the Reusable Form Part in question has been used in forms, updating it only requires that the user open that form and click on the Reload Toolbox icon (Figure 37) to update it. Once it is updated, **Save** the form again with the new Reusable Form Part.

4.6 Creating a New Form Library

Only one Library is allowed per Organization. As a result, creating a Library for the user's organization is expected to be an unusual event. Check to see if a Library exists, as it may have been created by default when VA MPN Form Builder was installed.

To create a Library, the process is almost identical to creating a form. The user starts at the Summary Page and clicks the **Create** button. When the VA MPN Form Builder Popup appears, the user selects their Organization from the dropdown menu and uses the word **Library** as the VA Form ID.

4.7 Gear Symbol for Basic Settings, Validations and Alerts, Formulas, Help Messages, and SMARTForms

The **Gear** symbol indicated by the solid arrow shown in Figure 56 opens a menu that allows the user to set the **Basic Settings, Validations and Alerts, Formulas, Help Messages, and SMARTForms** for the form template. The Gear symbol and the controls available are the same throughout the app. Note that this basic window appears for all control types that are added to a form template.

Figure 94: Control Settings Screen, Basic Settings Tab

Control Settings

Basic Settings | Validations and Alerts | Formulas | Help Message | SMARTForms

Control Name:

 E.g.: "first-name"

Options:

☐ Show in Summary

☐ Show in Search

☐ Email Recipient

☐ Show in Email Subject

Custom CSS classes:

Apply or Cancel

The **Control Settings Screen**, **Basic Settings** tab allows the user to enter a **Control Name**, such as "first-name." There are four options for the user to select, if required:

- **Show in Summary**
- **Show in Search**
- **Email Recipient**
- **Show in Email Subject**

For additional information, see the Orbeon User Manual at: <http://wiki.orbeon.com/forms/doc/user-guide/form-builder-user-guide#TOC-Text-controls>

In addition, **Custom CSS Classes** may be entered in the text box at the bottom. Click **Apply** to **Save** and continue, or **Cancel** to discard the entries and return to the previous screen.

Figure 95: Control Settings, Validations and Alerts Tab

Control Settings

Basic Settings | **Validations and Alerts** | Formulas | Help Message | SMARTForms

Default alert message: Use global default alert message: ☒

Validation Type	Validation Details	Level	Alert Message
<input checked="" type="radio"/> Required <input type="radio"/> Data Type <input type="radio"/> Constraint	* Required: <input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Formula	Error <input type="text"/>	<input type="text" value="Missing or incorrect value"/> <input checked="" type="checkbox"/>
<input type="radio"/> Required <input checked="" type="radio"/> Data Type <input type="radio"/> Constraint	Built-in Type: <input type="text" value="Date"/>	Error <input type="text"/>	<input type="text" value="Missing or incorrect value"/> <input checked="" type="checkbox"/>

Apply or Cancel

Clicking on the next tab opens the **Validations and Alerts** screen (Figure 95). This is where the user may set:

- **Validation Types**
- **Validation Details**

- **Level**
- **Alert Messages**

via radio buttons, dropdown menus, or typing.
The three **Validation Types** are

- **Required**
- **Data Type**
- **Constraint**

Validation Details allows the user to set the required details, which are **Yes**, **No**, and **XPath**. The validation details displayed will depend on the type of validation. The repeating grid here always sets Validation type of **Required** for first row, of **Data Type** for the second row and **Constraint** for third/fourth, etc., rows.

Figure 96: Validations and Alerts: Validation Types and Details

Validation Type	Validation Details	Level	Alert Message
<input checked="" type="radio"/> Required <input type="radio"/> Data Type <input type="radio"/> Constraint	* Required: <input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Formula	Error	Missing or incorrect value <input checked="" type="checkbox"/>
<input type="radio"/> Required <input checked="" type="radio"/> Data Type <input type="radio"/> Constraint	Built-in Type: Non-positive integer	Error	Missing or incorrect value <input checked="" type="checkbox"/>
<input type="radio"/> Required <input type="radio"/> Data Type <input checked="" type="radio"/> Constraint	Constraint: [Text Box]	Error	Missing or incorrect value <input checked="" type="checkbox"/>
<input type="radio"/> Required <input type="radio"/> Data Type <input checked="" type="radio"/> Constraint	Constraint: [Text Box]	Error	Missing or incorrect value <input checked="" type="checkbox"/>

Apply or Cancel

The dropdown menu for **Built-In Type** allows for most commonly required types (Figure 99). The **Alert Message** box allows the user to create custom error messages. A check box at the top (See arrow in Figure 95) allows the user to specify whether the **Default User Message** is used globally. If the error message is not to be shown globally, uncheck the box next to the label **Use global default alert message**. To enter the error message to be displayed when an error happens, uncheck the checkbox next to the gray **Alert Message** box. This will allow the user to enter the necessary message in freeform text.

4.7.1 Adding Customized Error Messages

Each required field will have its own error messages or a Default Alert Message can be set for all fields. The user may tailor the error messages for each individual field. The Default Alert Message is the default. No changes need to be made to keep the default (Use global default alert message is checked in the figure below).

Figure 97: Default Alert Message

Basic Settings | **Validations and Alerts** | Formulas | Help Message | SMARTForms

Default alert message:

Use global default alert message: ☒

To add a customized Alert message for a Required field or Data Validation, uncheck the Use global default alert message box. Then, update the Alert Message(s).

Figure 98: Customized Alert Messages for Required Field and Data Validation

Control Settings

Basic Settings | **Validations and Alerts** | Formulas | Help Message | SMARTForms

Default alert message:

Use global default alert message: ☐

	Validation Type	Validation Details	Level	Alert Message
<input checked="" type="radio"/>	Required	* Required: <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Formula	Error	This is a required field. Select the Veteran's condition from the choices provided.
<input type="radio"/>	Data Type	Built-in Type: String	Error	Invalid data type.

Apply or Cancel

The data type that will be validated can also be set on this tab. Users can select the Common Types, Number Types, and Date and Time Types for validation.

Figure 99: Control Settings, Validations and Alerts, Validation Details, Built-In Types Menu

Control Settings

Basic Settings Validations and Alerts **Formulas** Help Message SMARTForms

Default alert message: Missing or incorrect value

Use global default alert message: ☒

Validation Type

- ☒ Required
- ☐ Data Type
- ☐ Constraint

Common Types

- String
- Boolean
- Email address

Number Types

- Decimal
- Integer
- Positive integer
- Non-positive integer
- Negative integer
- Non-negative integer
- Double-precision floating-point

Date and Time Types

- Date**
- Time
- Date and time

Level	Alert Message
Error	Missing or incorrect value <input checked="" type="checkbox"/>
Error	Missing or incorrect value <input checked="" type="checkbox"/>

Apply or Cancel

Figure 100: Control Settings, Formulas Tab

Control Settings

Basic Settings Validations and Alerts **Formulas** Help Message SMARTForms

Calculated Value:

Initial Value:

Visibility:

Read-Only:

XPath expression

XPath expression

Boolean XPath expression

Boolean XPath expression

Apply or Cancel

The **Formulas Screen** (Figure 100) allows the user to manually enter **Calculated Value**, **Initial Value**, **Visibility**, and **Read-Only** in the form in either XPath or Boolean XPath expressions.

Figure 101: Control Settings, Help Messages Tab

The screenshot shows the 'Control Settings' dialog box with the 'Help Message' tab selected. The tab bar at the top includes 'Basic Settings', 'Validations and Alerts', 'Formulas', 'Help Message' (which is highlighted with a dashed border), and 'SMARTForms'. Below the tab bar, there is a checkbox labeled 'Use HTML'. Underneath, the text 'Help Message:' is followed by a large, empty text input area. At the bottom left of the input area, the text 'Displayed when help is activated' is visible. At the bottom right of the dialog, there are two buttons: 'Apply' and 'or Cancel'.

The **Control Settings, Help Messages Tab** (Figure 101) allows the user to enter the text for the Help Message to the form in either text or HTML. This is the message the eventual VA MPN Form Runner user will see when Help is activated.

Figure 102: Control Settings, SMARTForms Tab

The screenshot shows the 'Control Settings' dialog box with the 'SMARTForms' tab selected. The tab bar at the top includes 'Basic Settings', 'Validations and Alerts', 'Formulas', 'Help Message', and 'SMARTForms' (which is highlighted with a dashed border). The main content area is titled 'Enter UUID' and contains a 'UUID' label next to a text input field, followed by a 'Browse' button. Below this, there are labels for 'Control Name' and 'Control Description'. At the bottom of the main content area, there is a 'Find UUID' label and a dropdown arrow. At the bottom right of the dialog, there are two buttons: 'Apply' and 'or Cancel'.

The **Control Settings, SMARTForms tab** (Figure 102) allows the user to browse and enter a UUID. In addition, there is a Search function located under Find UUID where the user may search by Category, Class, and the name of the SMARTForm Coded Control.

The **Control Settings, Find UUID, Category Dropdown** menu is open in Figure 103 to show the options available in alphabetical order.

Figure 103: Control Settings, Find UUID, Category Dropdown Open

The screenshot shows a window titled "Control Settings" with a tabbed interface. The "SMARTForms" tab is selected. Below the tabs are two sections: "Enter UUID" and "Find UUID". The "Find UUID" section contains three input fields: "Category:", "Class:", and "Name:". The "Category:" field has a dropdown menu open, showing a list of categories. The "Class:" field has a dropdown menu open, showing a list of classes. The "Name:" field is a text input. A "Search" button is located to the right of the "Name:" field. The "Class:" dropdown menu is open, showing a list of classes. The list is alphabetical, and the top half is visible, including "Assessment", "Demographic", "Diagnosis", "Exam", "Examgroup", "Form", "Guidance", "History", "Intervention", "Misc", "Narrative", "Observation", "Physical Exam", "Records Review", "Rom", "Summary", and "Tests".

Control Settings

Basic Settings Validations and Alerts Formulas Help Message SMARTForms

Enter UUID

Find UUID

Category:

Select an Option:

- Assessment
- Demographic
- Diagnosis
- Exam
- Examgroup
- Form
- Guidance
- History
- Intervention
- Misc
- Narrative
- Observation
- Physical Exam
- Records Review
- Rom
- Summary
- Tests

Class:

Select an Option:

Class of the SmartForm
Coded Control

Name:

Name of the SmartForm
Coded Control

Search

In Figure 104, the **Control Settings, Find UUID, Class Dropdown** is shown with just the top half of the alphabetical Class menu choices shown. Figure 105 is the same menu with the bottom half of the options in view. The user scrolls up and down the menu using the right slider bar.

Figure 104: Control Settings, Find UUID, Class Dropdown Open, Top Half in View

Control Settings

Basic Settings

Validations and Alerts

Formulas

Help Message

SMARTForms

Enter UUID

Find UUID

Category:

Class:

Name:

Select an Option:

Select an Option:

Category of the SmartForm
Coded Control

Activity
Allergy
Ankle
Arm
Audio
Breast
Cardio
Dental
Dermatology
Diagnosis
Diagnostic and Clinical Test
Dietetics
Drug
Education
Elbow
Elimination
Endocrine
Ent
Eye
Feet
Function
General
Gi
Gu
Gyn
Hemato
Hip
Hygiene
Id

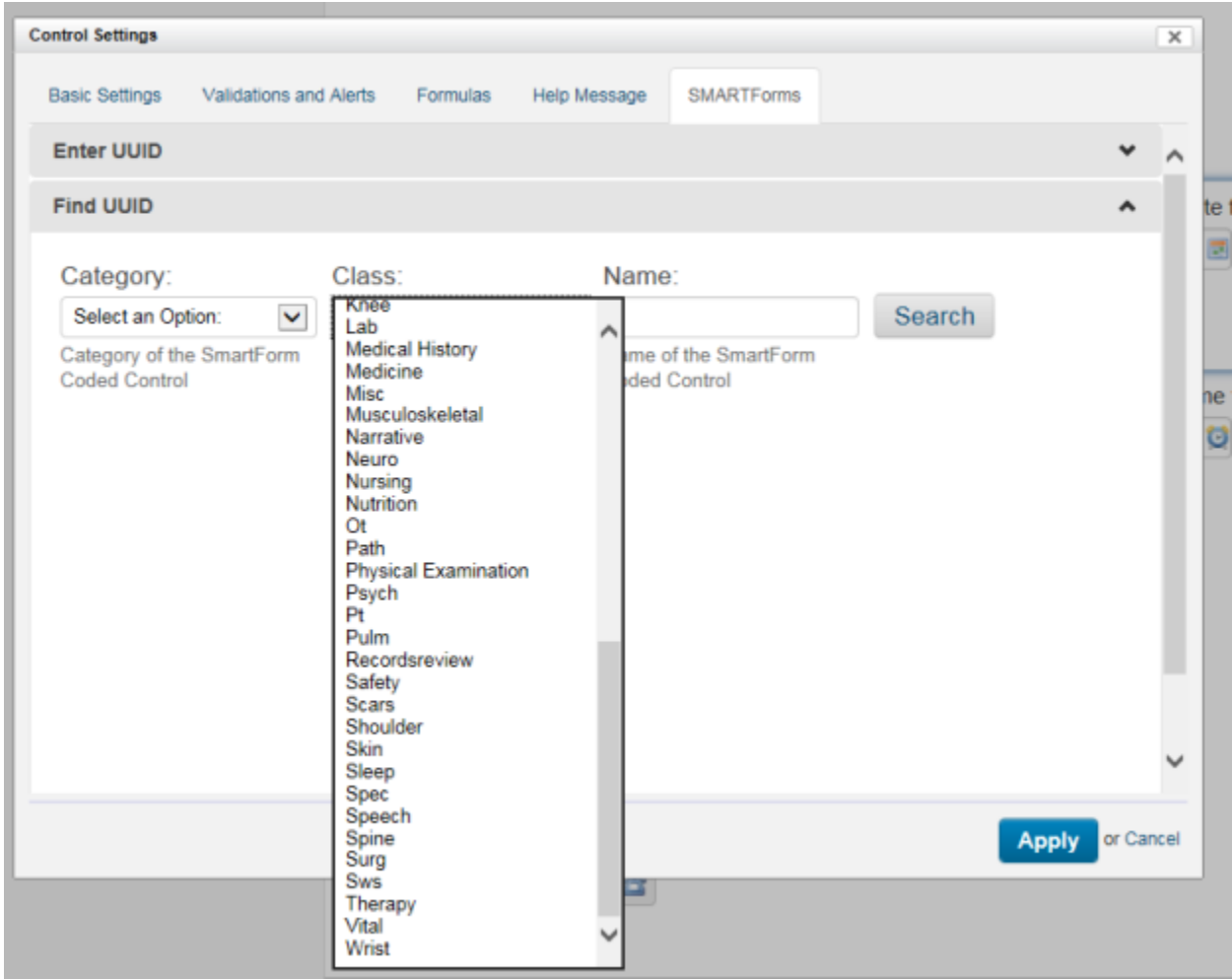
me of the SmartForm
ded Control

Search

Apply

or Cancel

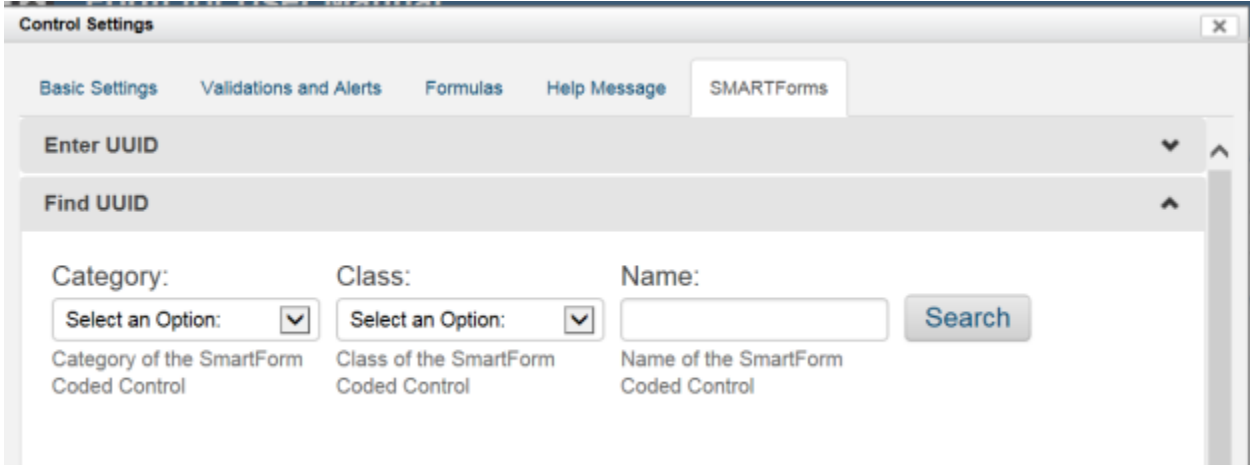
Figure 105: Control Settings, Find UUID, Class Dropdown Open, Bottom Half in View



4.7.2 Entering a SmartForms UUID

The **Enter UUID – SMARTForms** tab (Figure 106) allows the user to specify a UUID (Universal Unique Identifier) for the SmartForm Coded Control. This tab opens the **Enter UUID** and **Find UUID** section headers. The UUID may be manually typed into the field if known. Once a valid UUID is entered in the box, the system will populate the **Control Name** and **Control Description** so the user can verify the entry. Once a valid UUID is entered in the box, the system will populate the Control Name and Control Description so that the user can verify the selection. There is also a Browse link that can be clicked to find a particular UUID (Figure 106)

Figure 106: SMARTForms – Control Settings – Find UUID - Browse



Category and **Class** have pulldown menus for selection. The **Name** field is used to type in Name information in order to Search for a matching UUID. Note that the searching from the Name field will result in the system returning all coded controls with the search term entered. For example,

searching for "Hypertension" will return all Coded Controls containing the word "Hypertension." The system will return any coded control with a name containing the word(s) the user enters. For example, entering **Hypertension** will return any name containing that word anywhere in the name.

Once selections and/or a Name have been entered, clicking on the Search button will return matching UUIDs. For demonstration purposes in Figure 105, no **Category** has been selected, the Class **General** was chosen, and no **Name** has been entered. On clicking the Search button, Figure 107 appears. The figure has been truncated for space reasons.

Figure 107: Find UUID – No Category – Class: General – No Name Selected

The screenshot shows the 'Control Settings' window with the 'SMARTForms' tab selected. The 'Find UUID' section is active, displaying search criteria and results.

Search Criteria:

- Category: Select an Option (dropdown)
- Class: General (dropdown)
- Name: (empty text field)
- Search button

Results: Showing 1 to 2 of 2 entries. Show 10 entries (dropdown).

UUID	SmartForm Control Name	SmartForm Control Description
0B9EE334-184D-4006-B3FF-7D3B8F9BDA21	Remarks	Any free text remarks in addition to information already completed
753318CE-179B-478C-9E00-DF87C98D915E	Other pertinent physical findings complications conditions signs and/or symptoms	Other pertinent physical findings complications conditions signs and/or symptoms related to any conditions listed in section 1

The User may select the UUID desired from the displayed list. Note that there are only two entries to show, though Search may display up to 10 or more entries at a time if they exist (See Figure 14). See Figure 103, Figure 104, and Figure 105 to see examples of the Category and Class lists opened.

4.8 Changing User ID and Password

MPN will not be in production. MPN will be delivered to VA for eventual deployment to VA production systems. Changes to User ID and Password are being handled by the development team.

4.9 Exit System

Click Logout (Figure 108) in the upper right corner of the screen to exit the VA MPN Form Runner application. The user will be returned to the Welcome to Modernized Progress Notes Application screen.

Figure 108: Logout

The screenshot shows the top navigation bar of the application. It contains three links: 'About', 'Help', and 'Logout'. The 'Logout' link is highlighted in blue. Below the links, there is a 'Welcome' label followed by a blacked-out area.

5. Caveats and Exceptions

MPN will not be in production. MPN will be delivered to VA for eventual deployment to VA production systems.

6. HTML5 Use in VA MPN Form Builder

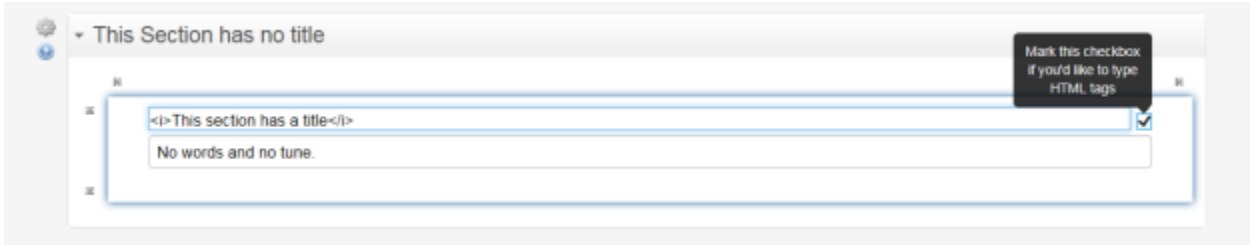
VA MPN Form Builder is designed to allow an experienced user to use HTML5 in some instances. To use HTML5 tags in a New Section, the user must first create a new Section by clicking the New Section button on the left Menu. The New Section appears. Click in the area at the top of the section and a text field appears (Figure 109) to enter a label.

Figure 109: New Section with Label



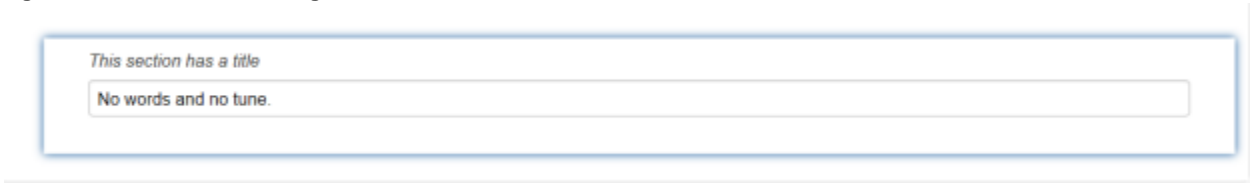
The user then adds the label including the HTML5 tags required. Note the small checkbox on the right. The user checks this box to allow the HTML5. In this case, the user has elected to use the tags for Italic font (Figure 110) in the label.

Figure 110: New Section Showing HTML5 Tags



When the user clicks Save, the new label with an Italic font header appears (Figure 111) as indicated.

Figure 111: New Label Showing HTML5 Result



6.1.1 HTML5 Tags

The following HTML5 tags have been tested in VA MPN Form Runner. A listing of HTML5 tags can be found at <http://www.w3schools.com/tags/default.asp>

HTML5 Tag/Character Reference	Effect
 	Begin Bold Text, End Bold Text
<	< (Less than)
>	> (Greater than)
<=	Less than or equal to
>=	Greater than or equal to
<i> </i>	Begin Italic Text, End Italic Text
<p> </p>	Begin Paragraph, End Paragraph
¼	¼
½	½

7. Project-Specific Scenario

Refer to the Usability Testing Plan located on the wiki: [REDACTED]

8. Troubleshooting

8.1 Note for Apple Macintosh Users

8.1.1 Missing Vertical Scrollbars

The Apple Macintosh OS has a feature to turn off vertical scrollbars. If you are not able to see vertical scroll bars in VA MPN Form Builder, it is likely that this feature is turned on. To turn it off, follow these steps.

Click on the **Apple Logo**. Then **System Preferences** (Figure 112, Figure 113). Click on the **General** logo (circled, Figure 113). Select the appropriate radio button to update the Show Scroll Bars section to **Always** (Figure 114). The VA MPN Form Builder screens should now show the vertical scrollbars (circled, Figure 115).

Figure 112: Macintosh System Preferences Menu

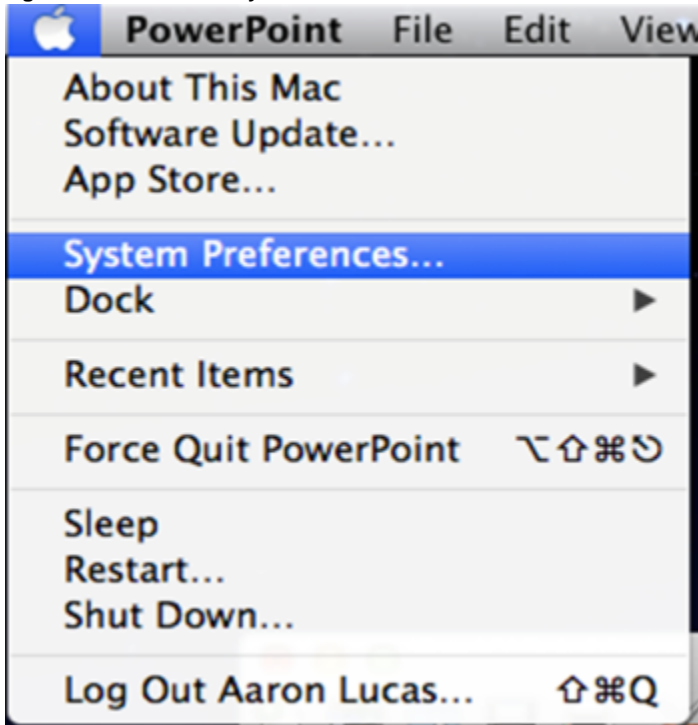


Figure 113: System Preferences Menu Open

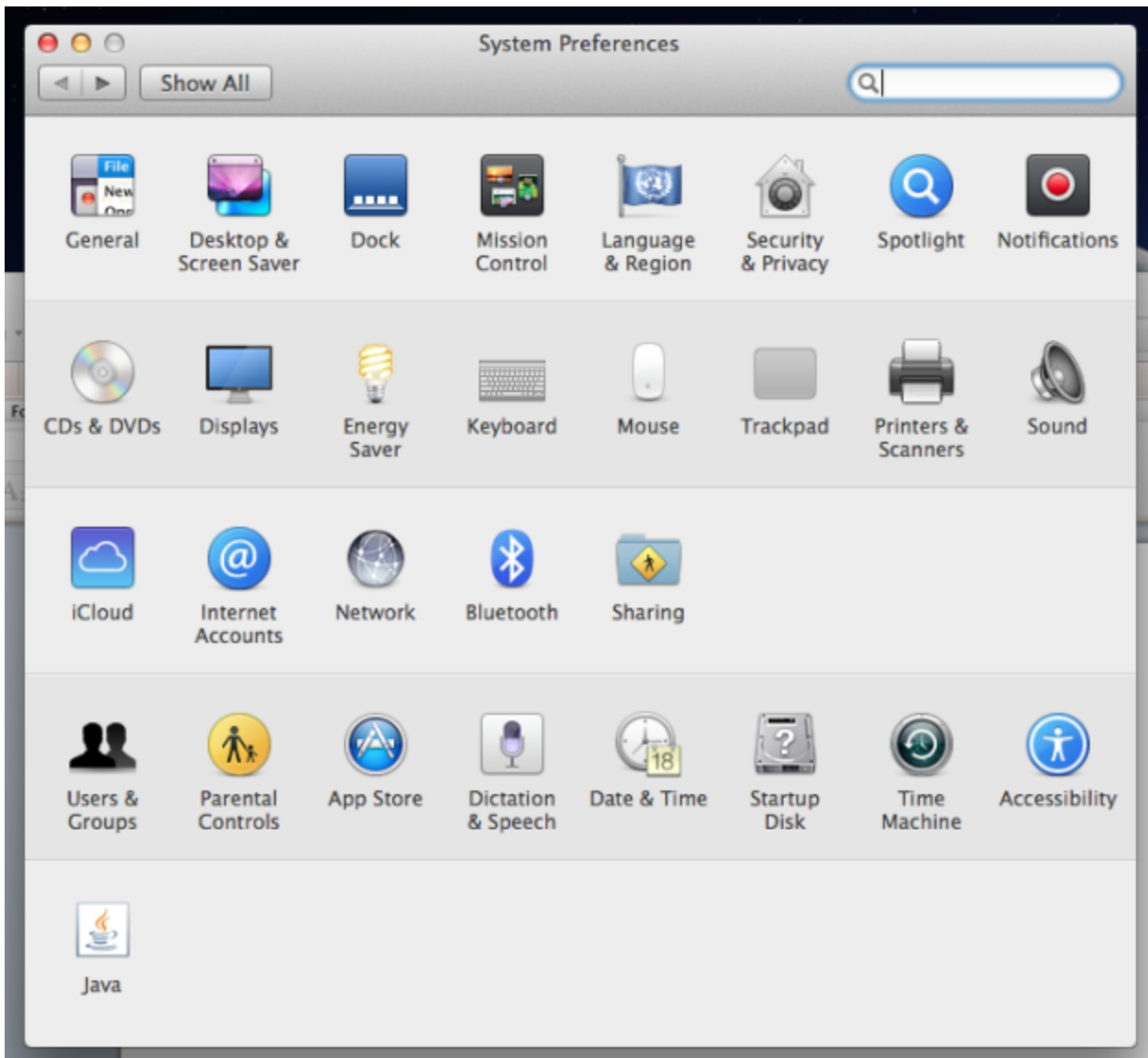


Figure 114: General Tab Open

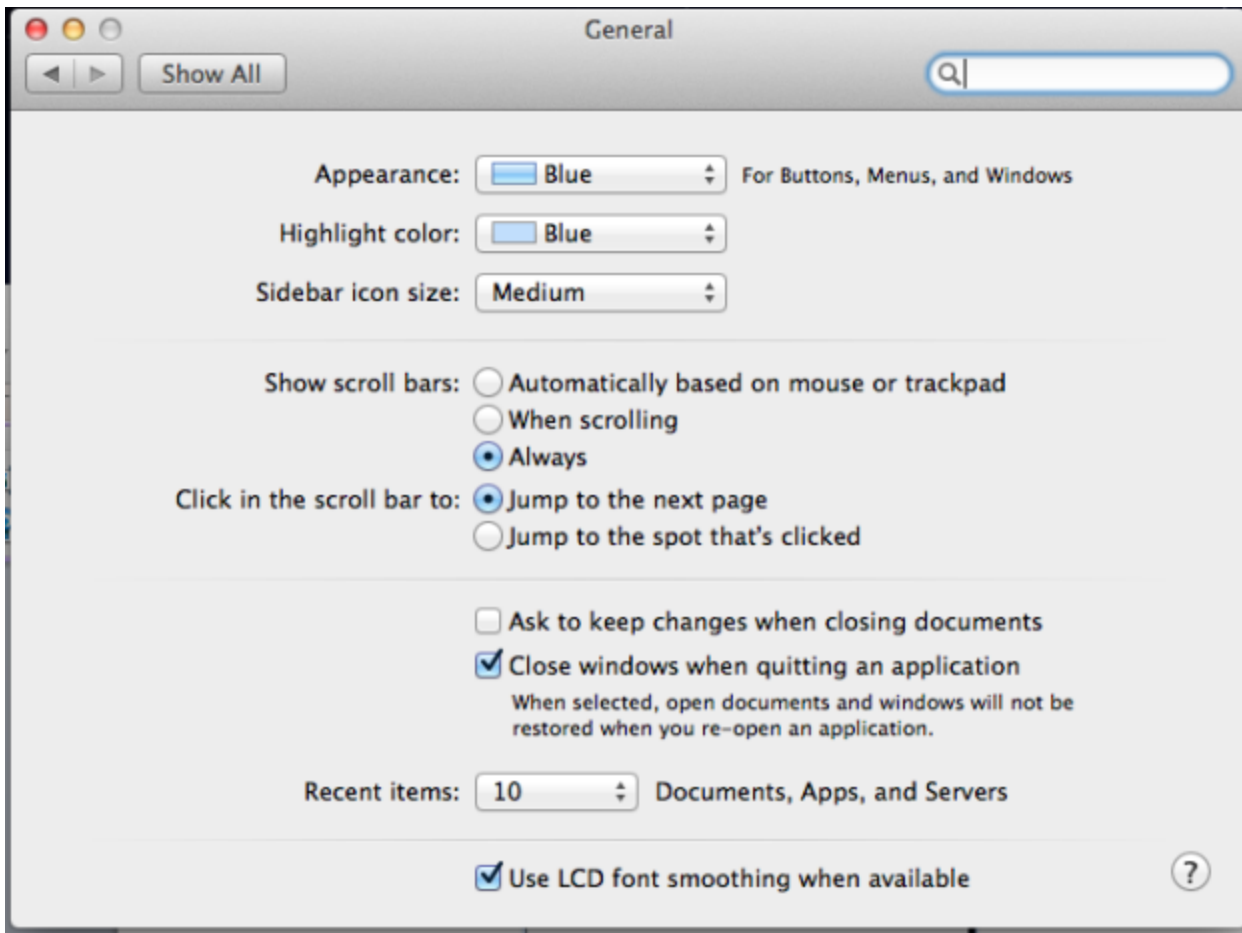
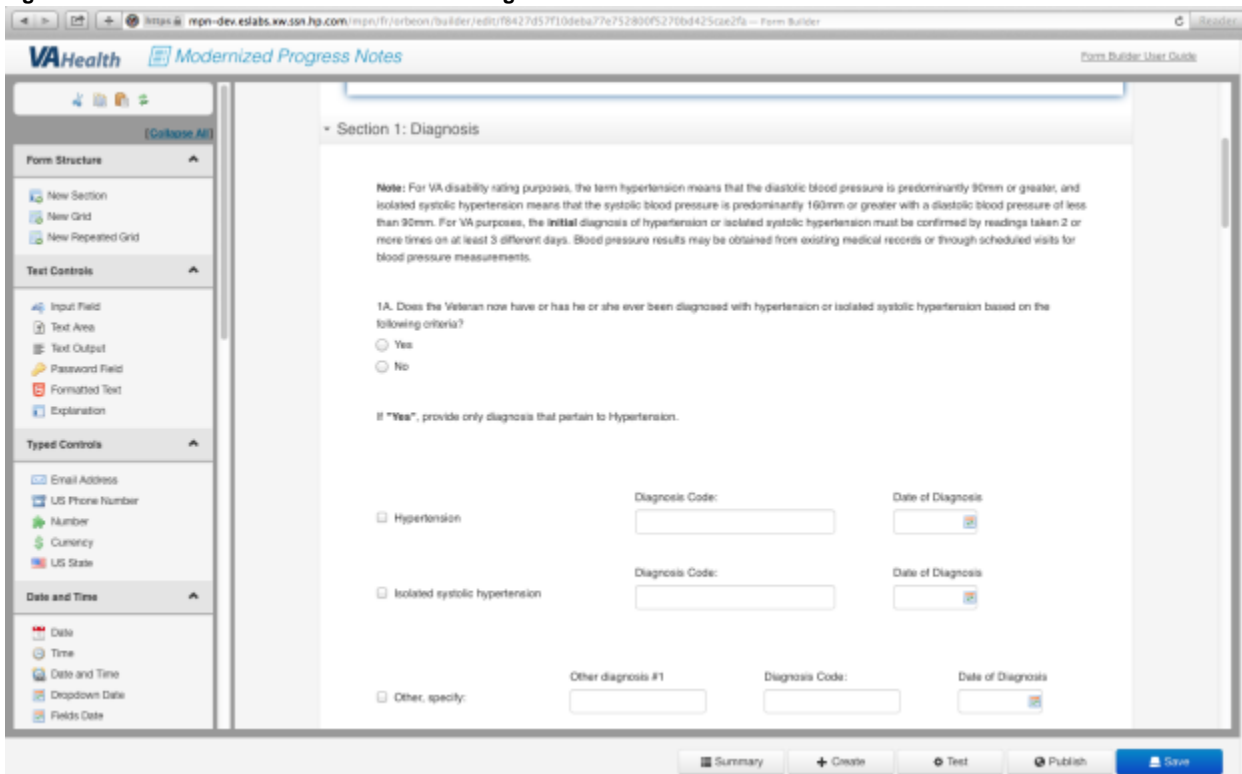


Figure 115: VA MPN Form Builder Screen Showing Vertical Scrollbar



8.2 Changing the VA Form ID and Title After Copying a Form

1. Click on the form on the Summary page in VA Form Builder to open the form.

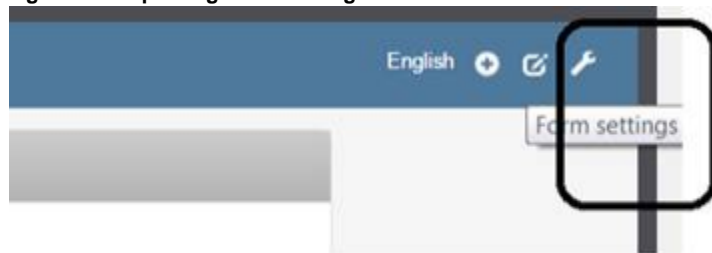
Figure 116: VA Form Builder Summary Page



Created	Modified	Current Version	Organization	VA Form ID	Display Title	Form Description
February 2, 2015 11:48:48	February 2, 2015 15:21:17	Not Published	test	test_10	Test 10	Test 10

1. In the Form Editor, click the Wrench icon (Form Settings) in the top right side of the screen.

Figure 117: Updating Form Settings



1. Change the VA Form ID of the new form. Click **Apply**.

Form Settings



* Organization:

test

Select a value available from the Organization dropdown. This value will be used to determine access to and structuring of forms.

* VA Form ID:

test_10

Enter lowercase letters, numbers, dashes, or underscores (e.g., "health_record" or "claim" or "21-0960a_1"). Maximum of 20 characters with no spaces allowed.

* Display Title:

Test 10

The text displayed to identify the title displayed on the form (e.g., Ischemic Heart Disease (IHD)).

* Form Description:

Test 10

The text displayed that defines the purpose of the form.

Form statistics

Sections	2
Repeats	0
Grids	1
Section templates	1
Controls	1
All	5

Apply

or Cancel

1. Return to the VA MPN Form Builder Summary page and confirm change has been made.