**Mental Health Checkup Provider User Guide v1.0.11**

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# Artifact Rationale

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

# Introduction

The VA Mobile Framework (VAMF) Mental Health Checkup provider facing application allows VA Staff members (ie. Mental Health providers) to assign assessments to Veterans based upon desired frequencies, receive alerts if a Veteran scores high on assessment and receive notifications when a Veteran has completed an assessment. It allows the provider to review all assigned assessments for a Veteran and to end assignments as needed. It allows the provider to review each completed assessment and provide feedback to the Veteran. It utilizes a Mongo database and retrieves the assessment name, questions, answers and scores from VistA.

The Mental Health Checkup mobile application supports the implementation of measurement-based care for Veterans with mental health conditions. Measurement-based care entails administration of standardized self-report assessment instruments that evaluate an individual’s level of symptoms and distress associated with a specific diagnosis or condition. For example, health care providers use the Patient Health Questionnaire (PHQ-9) to measure patient symptoms related to depression. This mobile solution enables Veterans to complete assessments on a regular basis, without having to use clinic visit time and clinician resources to administer the tests or enter the data. Patients’ care outcomes improve, as clinicians have better access to self-assessment data, leading to an enhanced ability to make care decisions and longitudinal care plans that are based on up to date, accurate data.

The self-assessment results are available in real time for feedback to the patient, with text and graphical information available for the clinician both when the patient is not physically at an appointment and at the time of visit. The application includes various self-assessment "modules". Modular development will allow the scope to grow as new self-assessment instruments are integrated into the application. The completed assessment data is integrated into the existing Veteran Health Administration (VHA) Mental Health Assistant (MHA) software application.

## Purpose

The purpose of this Mental Health Checkup User Guide is to provide an overview of the Mental Health Checkup application functionality as well as access procedures for the software. Also included in this manual is a general overview of the Mental Health Checkup application.

## Document Orientation

### Organization of the Manual

*Mental Health Checkup Provider User Guide* provides explanations of each screen and of all user interface options within the context of an easy to understand demonstration data scenario.

The *Mental Health Checkup Provider User Guide* is designed to provide the Provider with screen-by-screen "how to" information on the usage of the Mental Health Checkup Provider app.

**Section 1: Introduction**

The Introduction section provides the purpose of this manual, an overview of the Mental Health Checkup provider application, an overview of the software used, project references, contact information for the user to seek additional information, and an 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 provides a general walk-through of the system from initiation through exit, enabling the user to understand the sequence and flow of the system.

#### Section 4: Using Mental Health Checkup

This section gives the user the “how to” information to use the Mental Health Checkup provider application, including many step-by-step procedures.

#### Section 5: Troubleshooting

This section provides troubleshooting for the Mental Health Checkup User.

### Assumptions

The following assumptions are made about the Mental Health Checkup application:

The Provider using the app is established in VistA New Person file and has a working access/verify code.

Mental Health Checkup requires access to at least 1 VistA site that serves as the source of record for MH Administrations along with their questions, answers and scoring.

### Coordination

If any changes are made to the VistA Mental Health package, the Mental Health Checkup team needs to be notified and any impact needs to be determined. There are approved ICRs that document the interface agreements.

If any changes are made to VistALink and/or network access methods to VistA, the Mental Health Checkup team needs to be notified and any impact needs to be determined.

If any changes are made to Identity Management’s retrieve corresponding IDs or retrieve patient traits functionality, the Mental Health Checkup team needs to be notified and any impacts need to be determined.

If any changes are made to the VistA Data Services patient lookup, Mental Health Checkup needs to be notified and any impacts need to be determined.

### Disclaimers

#### Software Disclaimer Documentation Disclaimer

The appearance of external hyperlink references in this manual does not constitute endorsement by the Department of Veterans Affairs (VA) of this Web site or the information, products, or services contained therein. The VA does not exercise any editorial control over the information you may find at these locations. Such links are provided and are consistent with the stated purpose of the VA.

### Documentation Conventions

This manual uses several methods to highlight different aspects of the material.

|  |  |
| --- | --- |
| **Symbol** | **Description** |
|  | NOTE: Used to inform the reader of general information including references to additional reading material |
|  | **CAUTION: Used to caution the reader to take special notice of critical information** |

### References and Resources

**National Service Desk and Organizational Contacts**

The Help Desk is available weekdays from 7 a.m. to 7 p.m. (CT).

For help with this application contact the VA Mobile App Help Desk toll free at 1-877-470-5947.

For DS Logon (Department of Defense Self-Service Logon) related questions contact the eBenefits help line toll free at 1-800-983-0937.

## Acronyms and Abbreviations

The following table contains a list of acronyms and abbreviations and their definitions.

|  |  |
| --- | --- |
| **App** | **Application** |
| CT | Central Time zone |
| DS Logon | Department of Defense Self-Service Logon |
| EULA | End-user License Agreement |
| FAQ | Frequently Asked Questions |
| ID | Identification |

|  |  |
| --- | --- |
| IPA | In-Person Authentication |
| OS | Operating System |
| PCS | Patient Care Services |
| SME | Subject Matter Expert |
| TDD | Telecommunication Device for the Deaf |
| VA | Department of Veterans Affairs |
| VAMC | VA Medical Center |
| VAMF | VA Mobile Framework |
| VHA | Veterans Health Administration |

# System Summary

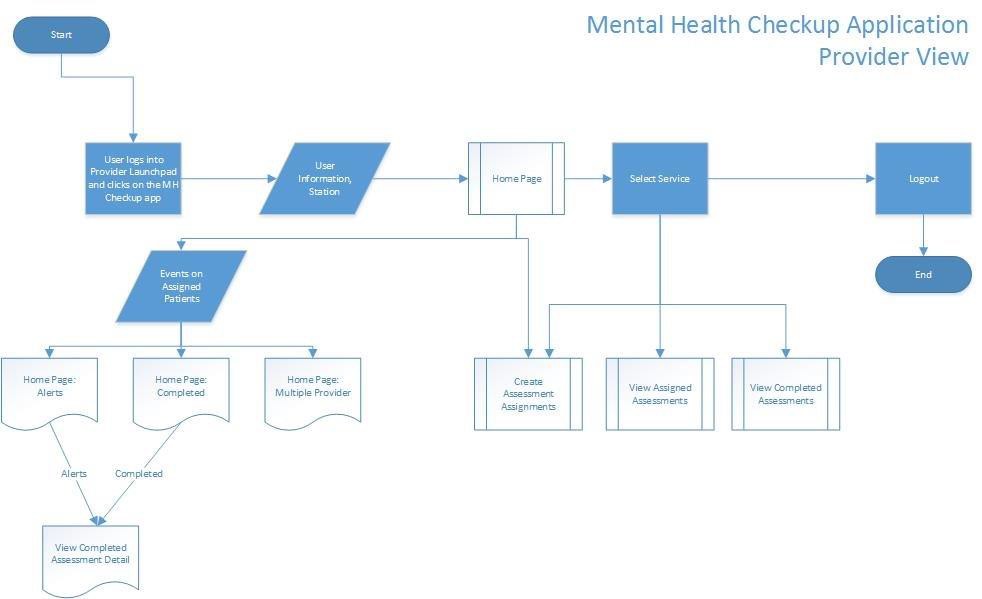
## System Configuration

Mental Health Checkup is an application intended to be used on the VA Intranet via a web browser on a personal computer or a tablet. The device must have active Wi-Fi connectivity in order for the application to function fully. It must also have connectivity to VistA in order to have access to all functions. The application can be used on the following browsers: Safari 11+, Chrome 68+, Internet Explorer 11+.

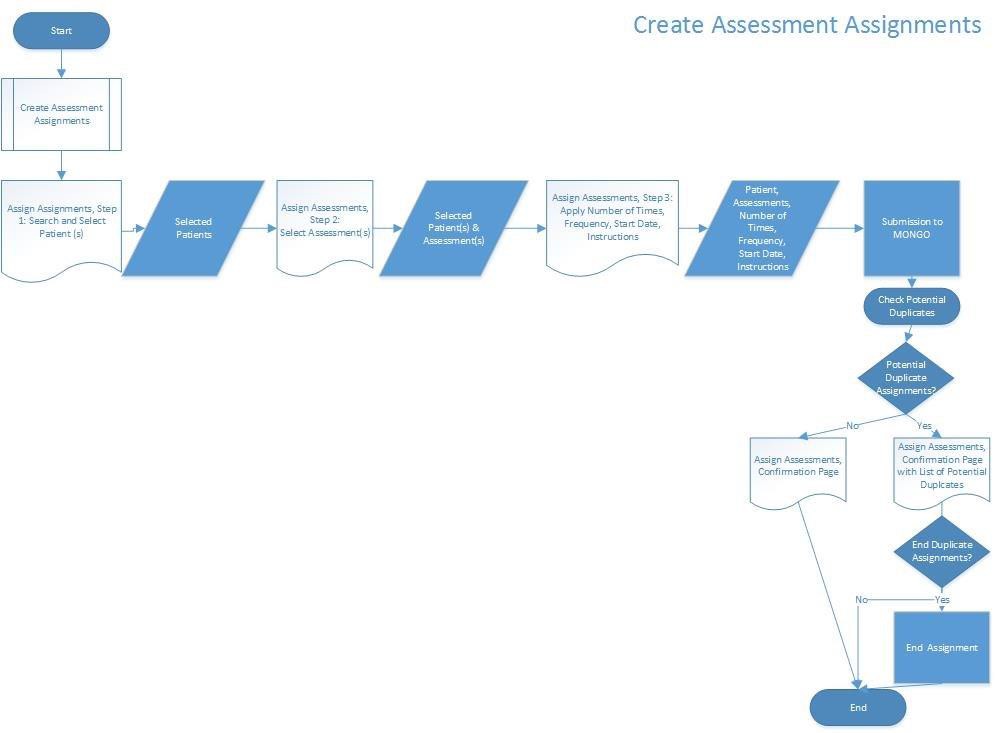
## Data Flows

The following is a graphic representation of the flow of data through the Mental Health Checkup application.

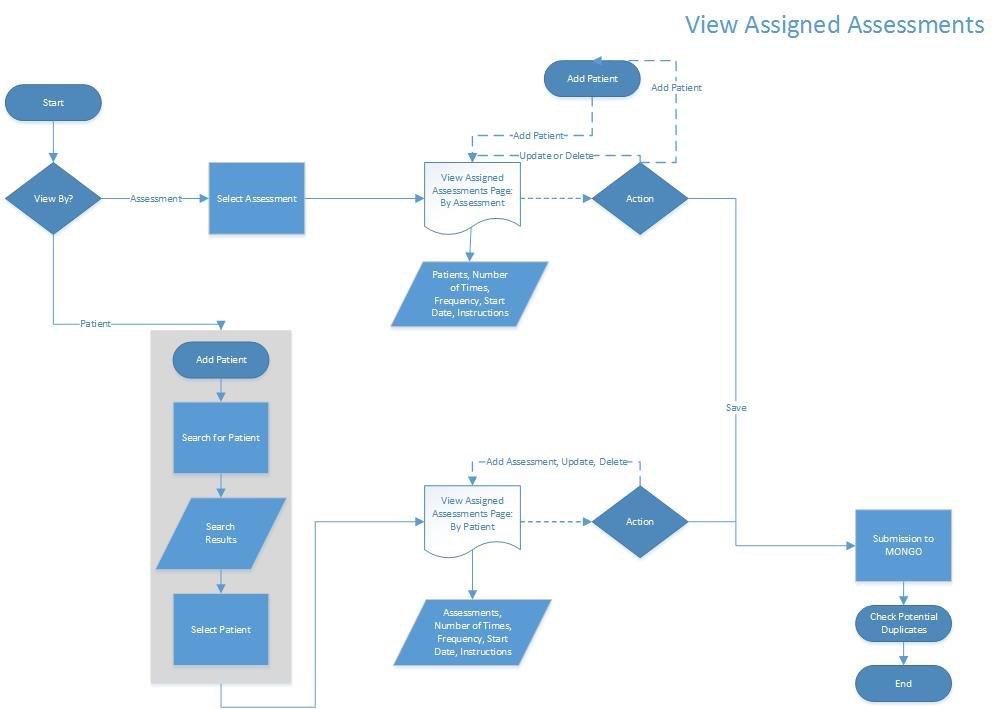
### Provider Process: Overview



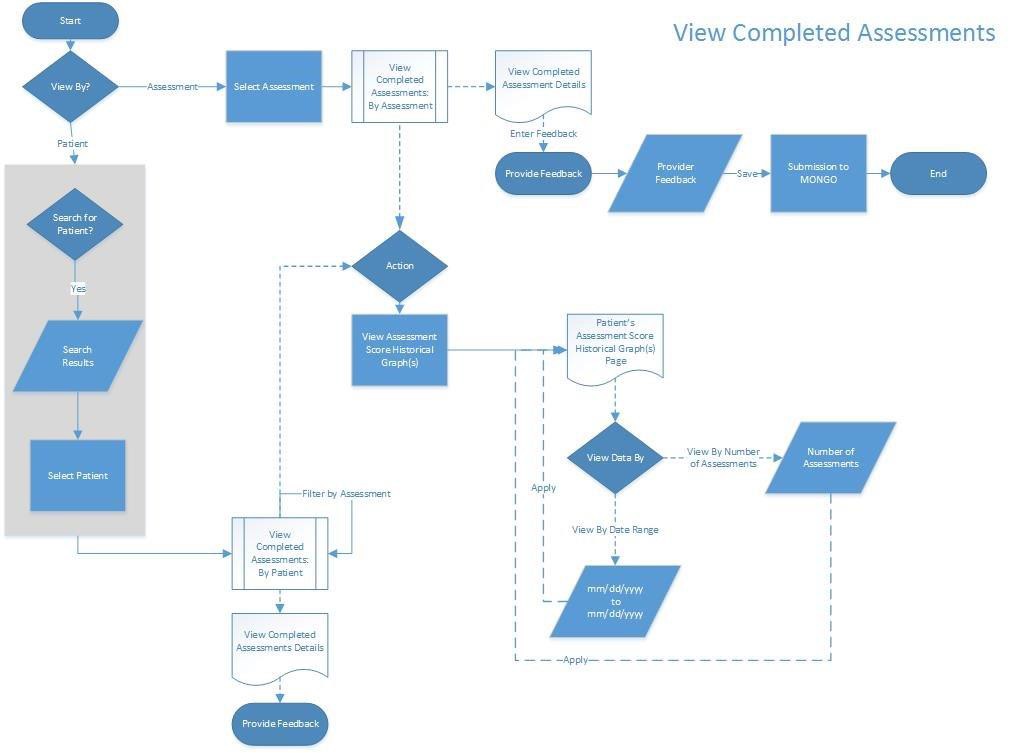
**Provider Process: Create Assessment Assignments**



**Provider Process: View Assigned Assessments**



**Provider Process: View Completed Assessments**



**User Access Levels**

The table below defines the different levels of user access to the application:

|  |  |  |
| --- | --- | --- |
| **Name** | **Description** | **Mobile Application Access** |
| Primary Users | Mental Health Providers | Access to all functionality |
| Secondary Users | System Administrators | Access level necessary to maintain upkeep, configuration, and reliable operation of the application as needed |

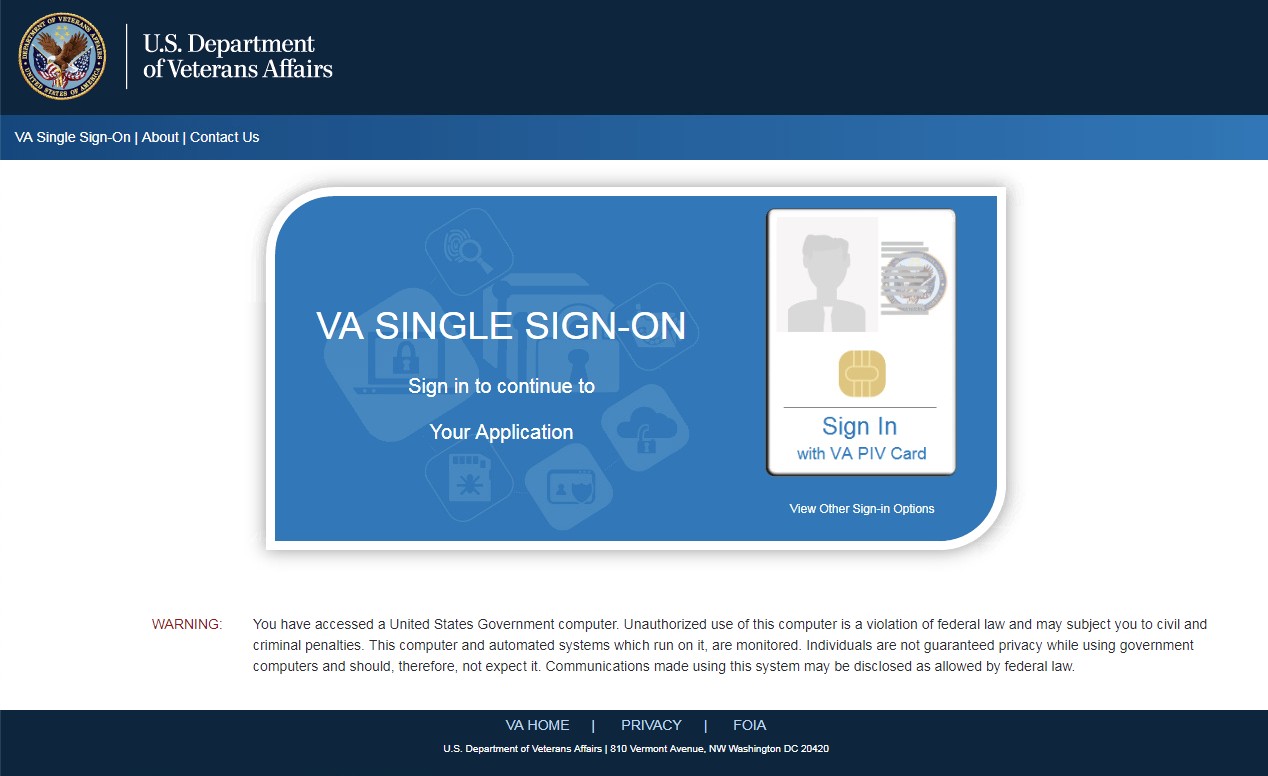
## Continuity of Operation

**Getting Started**

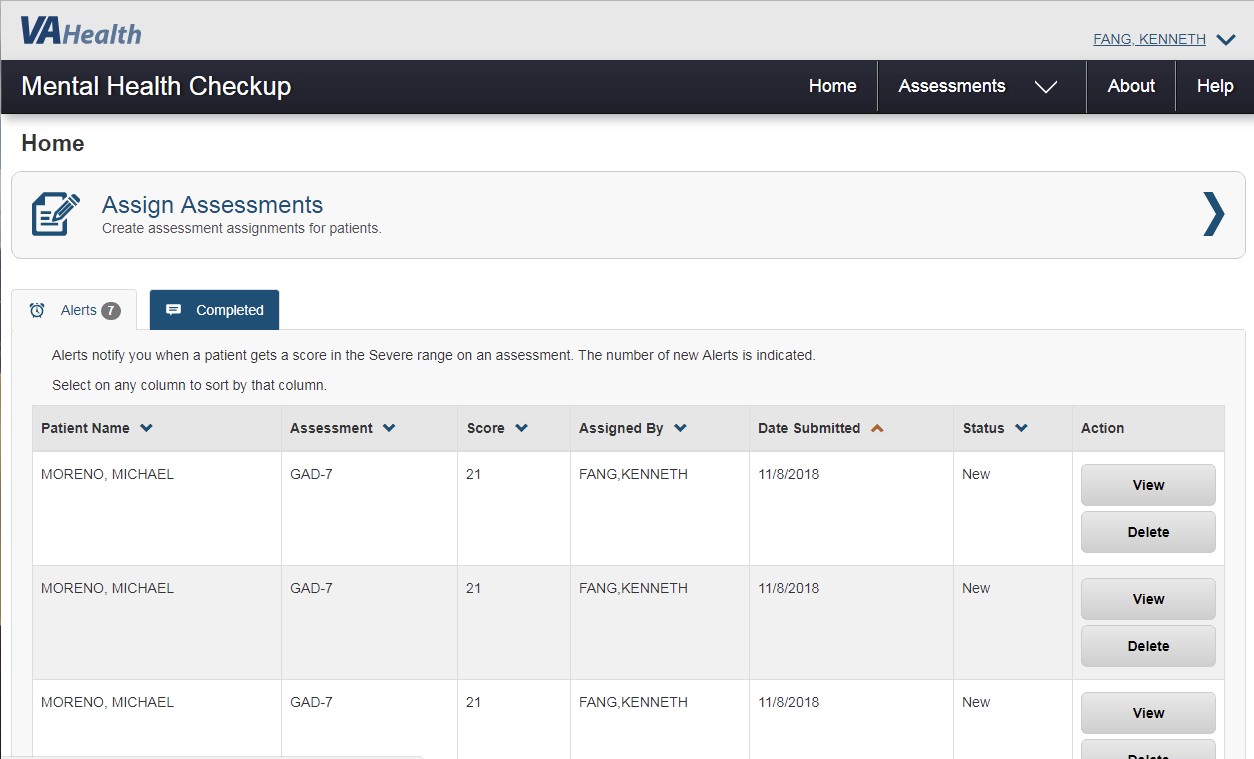
The Mental Health Checkup mobile application supports the implementation of measurement-based care for Veterans with mental health conditions. Measurement-based care entails administration of standardized self-report assessment instruments that evaluate an individual’s level of symptoms and distress associated with a specific diagnosis or condition. Providers are able to assign assessments for Veterans to complete on a regular basis without having to use clinic visit time and clinician resources to administer the instruments or enter assessment data. They are able to view all assignments and all completed assessments for each Veteran or a panel of Veterans and provide feedback as needed on each completed assessment.

## Logging On

The Mental Health Checkup Provider app is integrated with VA Single Sign-On. When accessing the application, you will be redirected to the Single Sign-On screen to sign on:

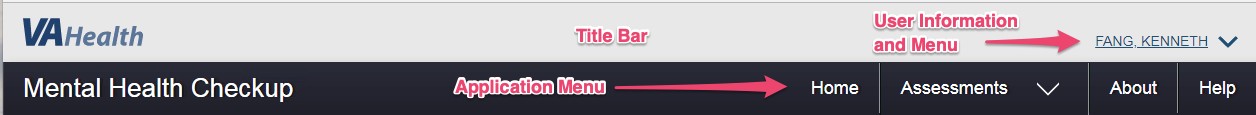


Once sign on has been completed you will redirected to the Provider Home Page:



## System Menu

The Mental Health Checkup Home screen displays the VA Health title bar that contains the Provider Name and provides logout access. It also displays the Mental Health Checkup Title Ribbon that contains the Menu the Provider will utilize to access the application functionality.



### User Information and Logout Menu

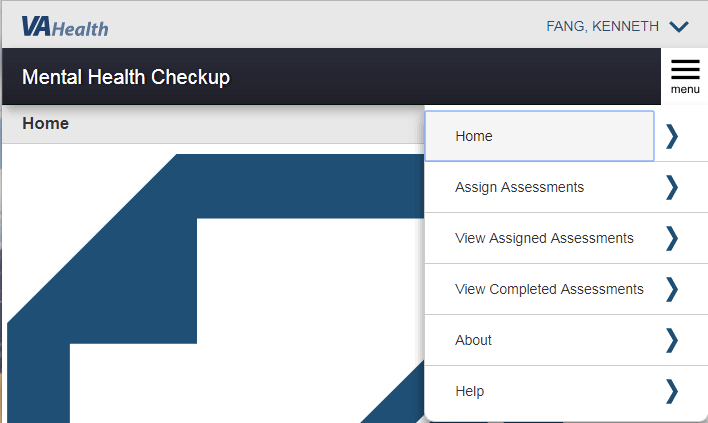
The name of the staff logged into and using Mental Health Checkup is displayed in the upper right hand corner. When you tap on the user name a menu drops down providing the options of logging out or returning to the VA LaunchPad where other applications are available. Tap on your name to open a drop-down menu with two options. Tap **Return to Launchpad** to view other applications available or tap **Log Out** if you are through working with this application.



### Mental Health Checkup Provider Title Ribbon and Menu

This dark title ribbon is on top of every screen in the Mental Health Checkup application. Tap any menu dropdown (or the **menu** icon if in phone or tablet view) on the right side of the title ribbon to view the options available in the drop-down menu.

or



Tap **Home** to return to the Home screen from any location in the application.

Tap **Assign Assessments** to search for a Veteran(s) and assign assessment(s).

Tap **View Assigned Assessments** to view current assignments for a specific Veteran or for a specific Assessment Name.

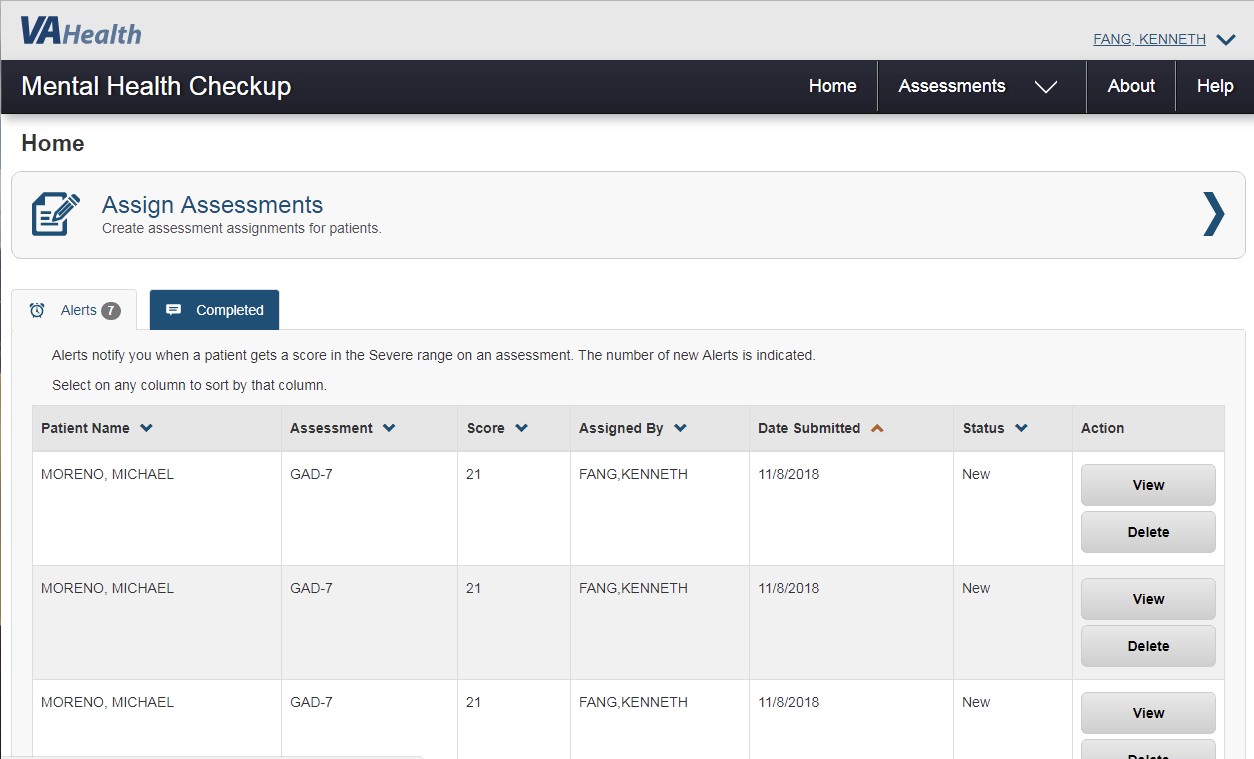
Tap **View Completed Assessments** to view completed assessments for a specific Veteran or for a specific Assessment Name. Tap **About** to open a pop-up window with information about this application and a description of its purpose.

Tap **Help** to open a pop-up window with details about system requirements and resources, such as this user manual, to answer questions and learn about using this application.

For help with this application contact the VA Mobile App Help Desk at 1-877-470-5947 (TDD 1-800-829-4833).

## Home Screen Features

The Mental Health Checkup Home screen offers the Provider the ability to Assign Assessments to one or more patients and to view events related to the patients they are treating.



### Assign Assessments

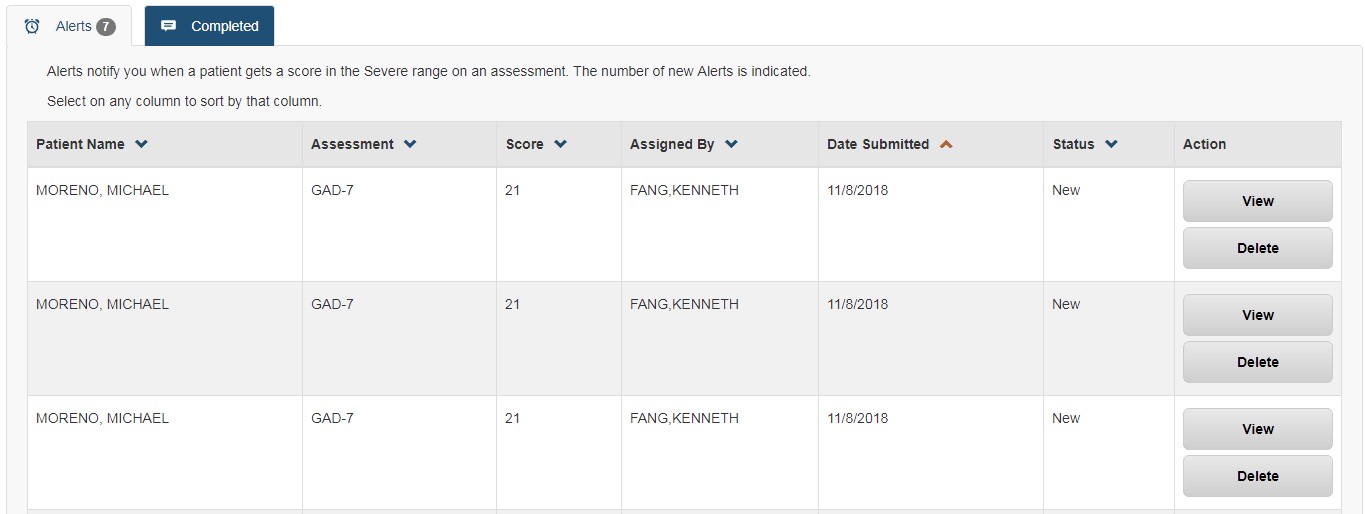
This feature allows Providers the ability to create assessment assignments for patient(s).



### Alerts

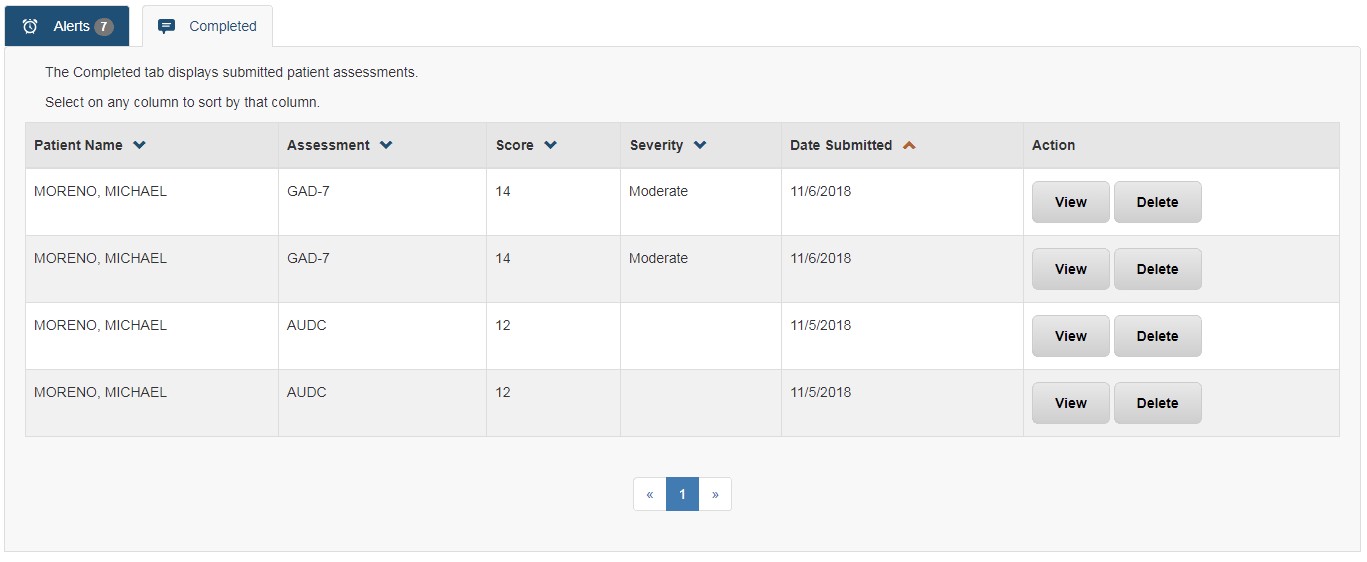
This feature displays event notifications when completed assessments indicate acute responses, such as suicidality. “Alerts” events are sent to the provider(s) who have an active assignment for the assessment type when the patient completes the assessment with a score of HIGH. The number of new alert events will be indicated inside the circle at the top of the Alerts header to notify the Provider they have new “Alerts” events to review.

The “Alerts” events have a status of “New” when issued. If the Provider taps on the alert to view the details for the completed assessment associated with the event, the status is changed to “Viewed. If the “Alerts” event is no longer needed, the Provider can delete the notification to remove it from the list.



### Completed

This feature displays event notifications when assessments are completed with scores lower than HIGH. The “Completed” events are sent to the Provider(s) who assigned the assessment when a patient has completed the assessment. The Provider can tap on the notification to view the patient’s assessment results. If the “Completed” event is no longer needed, the Provider can delete the notification to remove it from the list.



### Multiple Providers

This feature displays event notifications when a patient assignment is ended by someone other than the Provider who originally made the assignment. The “Multiple Providers” events are sent to the provider when another provider has ended a patient assignment that you originally established. These events can be created during the Assign Assessments or the Update Assignments process. This tab will not be displayed if the Provider does not have any events to display. If the “Multiple Provider” event is no longer needed, the Provider can delete the notification to remove it from the list.

## Exit System

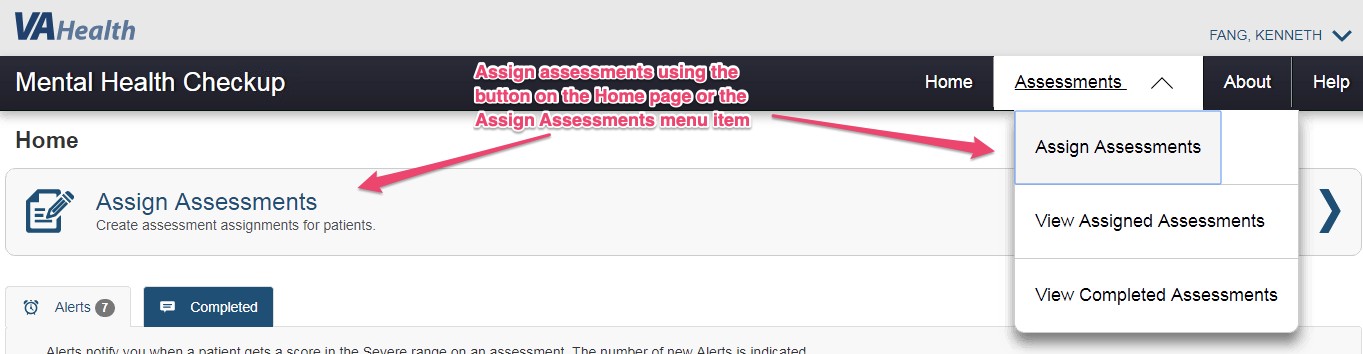
It is important to log out of the Mental Health Checkup application so that other people cannot access personal information without permission. Tap on the name in the furthest upper right corner, then tap **Log Out** to close the application and protect your privacy. Refer to [User Information](#_bookmark31) [and Logout Menu](#_bookmark31) for details.

# Using Mental Health Checkup Provider

The main features of the Mental Health Checkup application are documented below.

## Assign Assessments

This feature allows the Provider to assign one or more MH assessment to one or more patients. To start the assessment assignment process, (1) tap Assign Assessments from Home page or (2) tap **menu** on the title ribbon and then tap **Assign Assessments** from the drop-down menu.



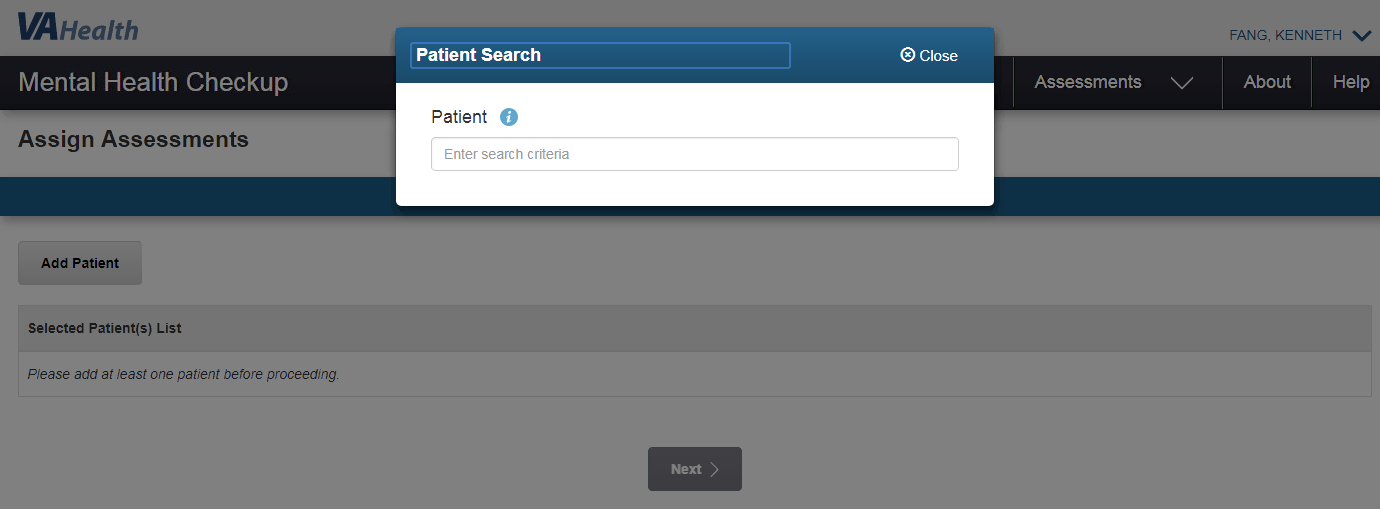
Then follow 4 steps to assign an assessment for each patient

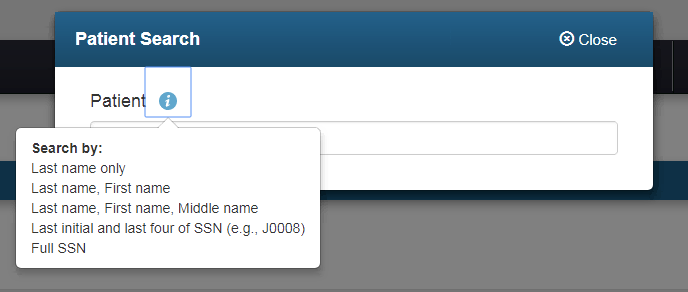
### Assign Assessments - Step 1 - Add Patients

Tap Add Patient to select the Patient(s) to assign the assessment(s) to:

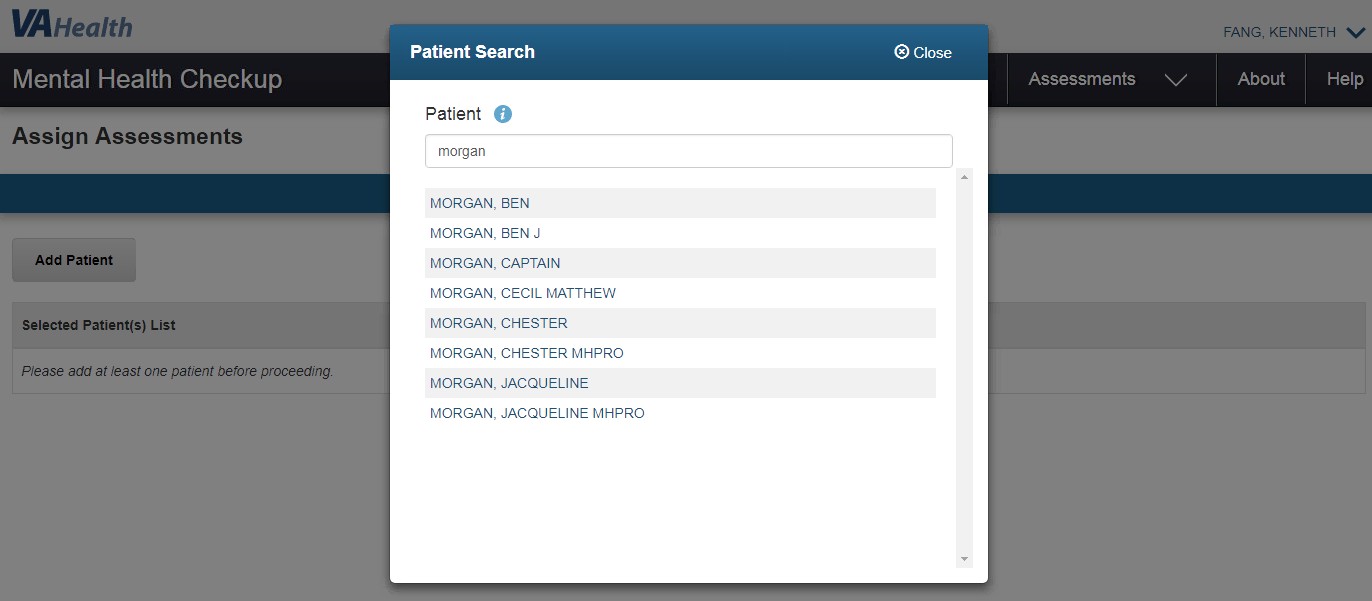
#### Patient Search

In the **Patient** field, enter the last name, first name, or Social Security Number (SSN). Click the information icon to view the accepted formats accepted for the search. Tap **Go**.

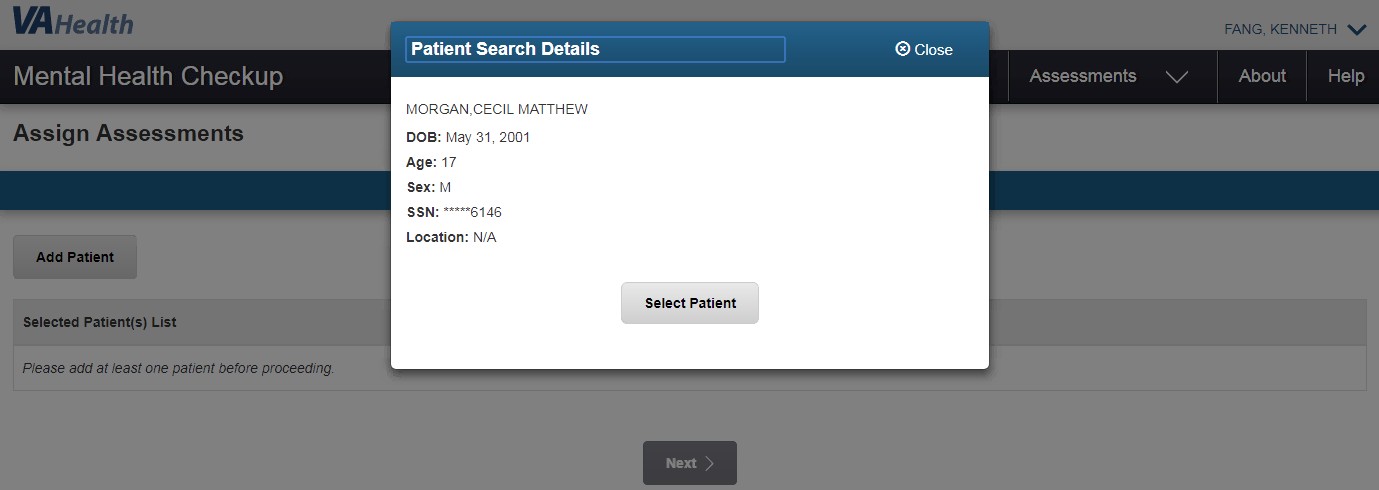




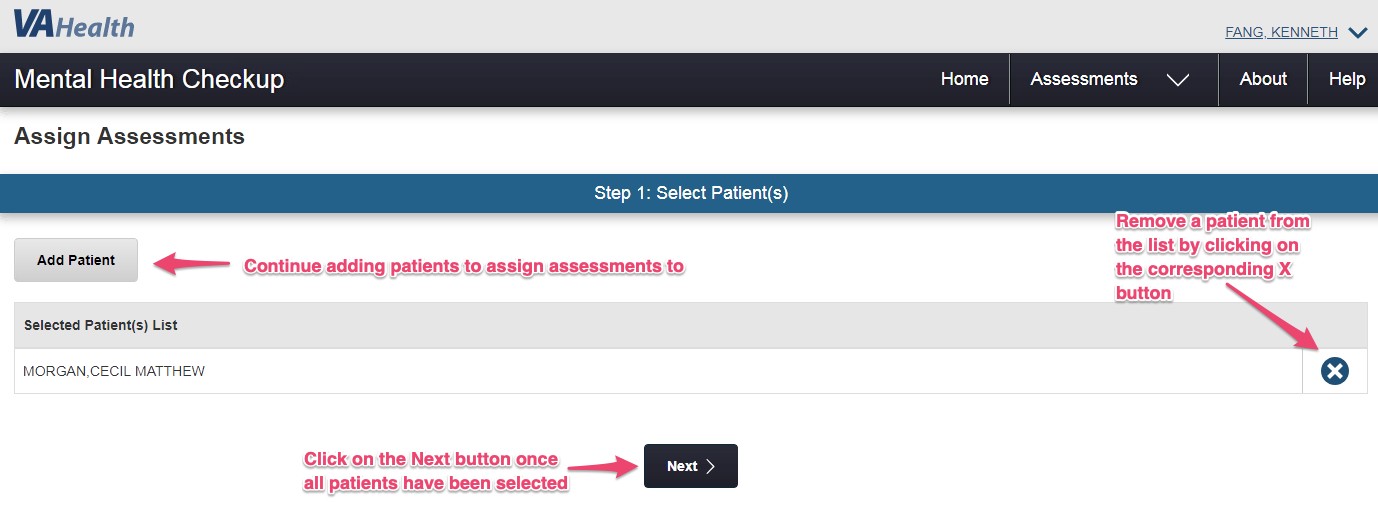
This will return a list of matching patient names.



Select the correct patient from the list of results and the Patient Details will appear:



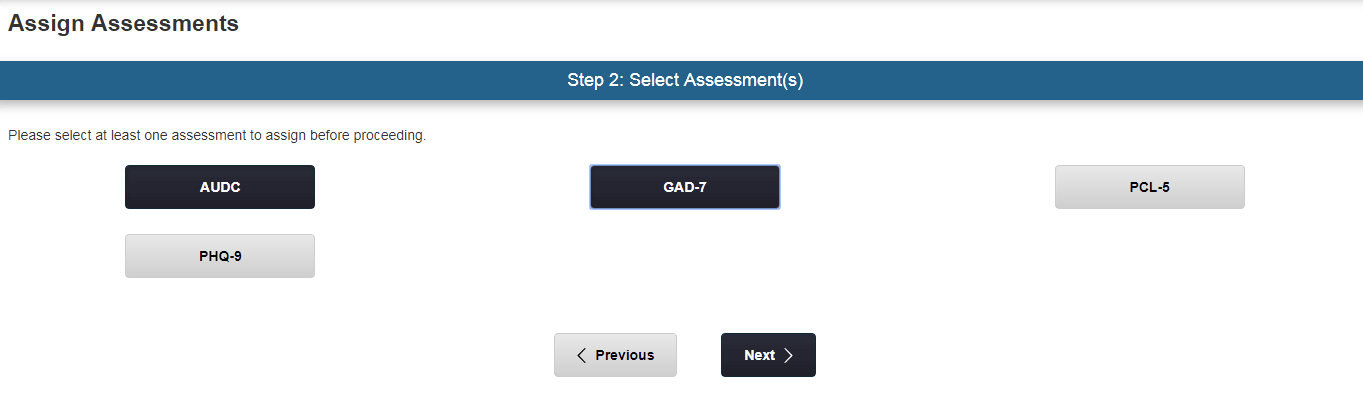
Tap **Select Patient**. The selected patient name will now display in the list of selected patient(s).



Tap **Next>** once all patients are selected.

### Assign Assessments - Step 2 - Assign Assessments

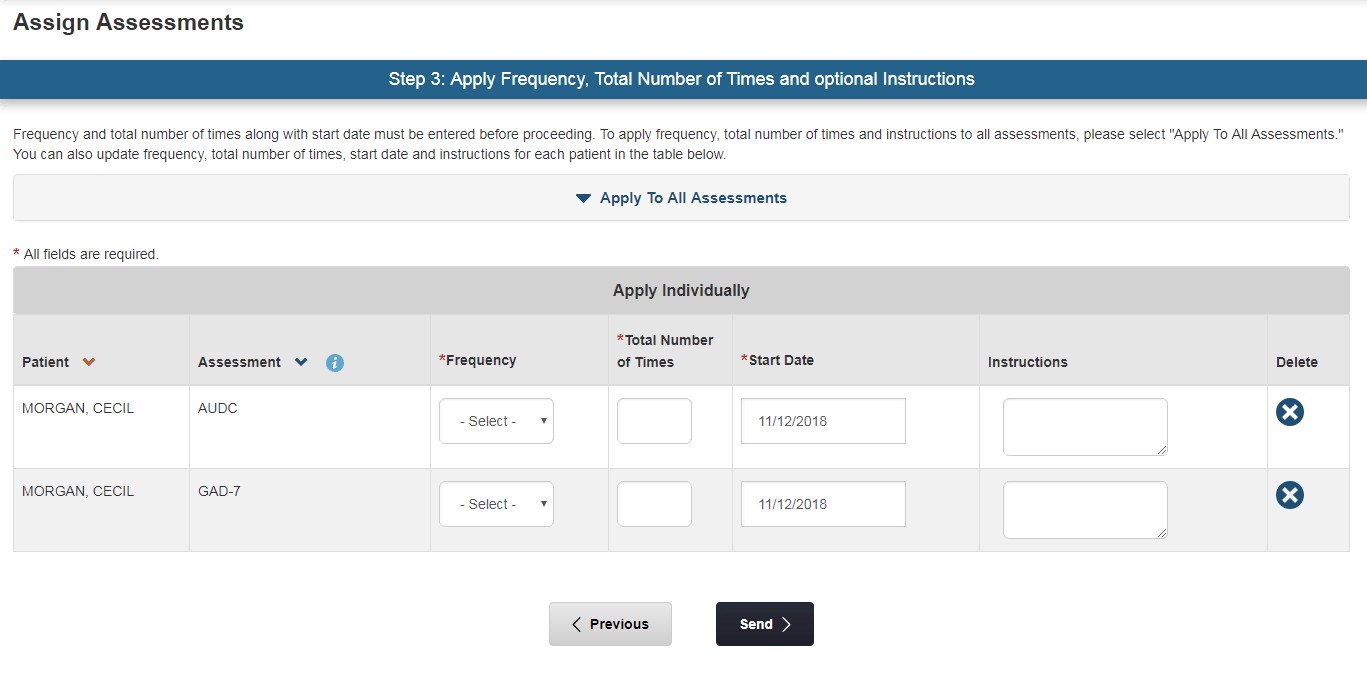
Select one or more assessments to assign



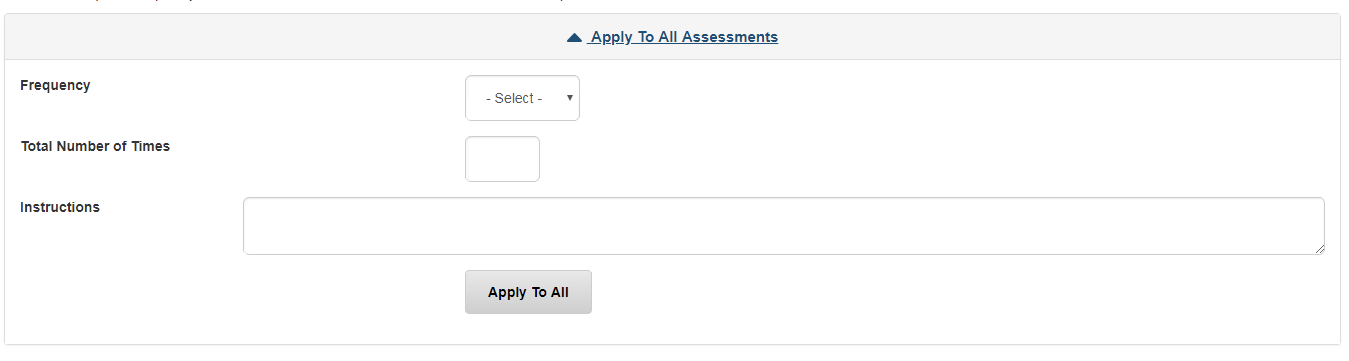
Tap **Next>** to continue

### Assign Assessments - Step 3 - Set Frequency, Total Number of Times, Start Date, and Provide Instructions

On the next screen you will assign the frequency, total number of times, start date, and provide instructions for each assessment being assigned



You can click “Apply To All Assessments” if you want to apply the same Frequency, Total Number of Times, Start Date and optionally Instructions to all assessments or you can click “Apply Individually” and choose each individually.



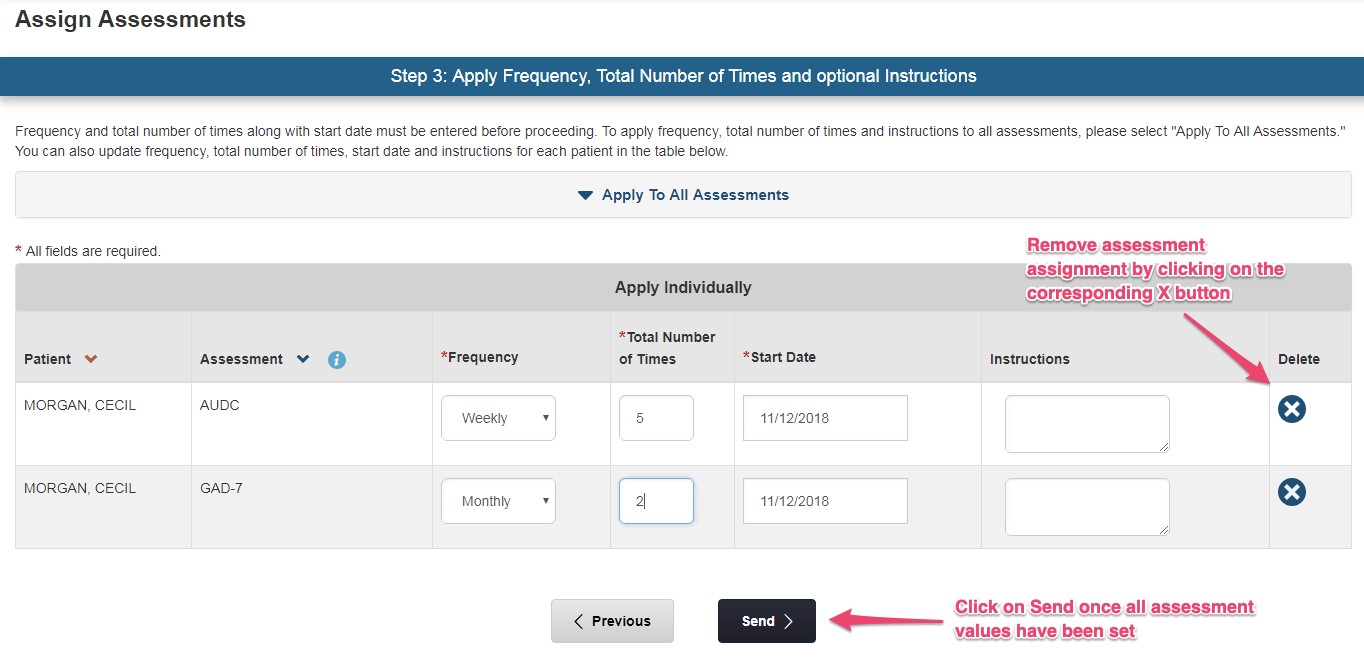
For each assessment

From the **Frequency** drop-down menu, select how often the assessment will be performed. If “Once” is selected; Total Number of Times will be defaulted to 1.

In the **Total Number of Times** field, enter the total number of times the assessment needs to occur. In the **Start Date** field, enter the start date for the assessment.

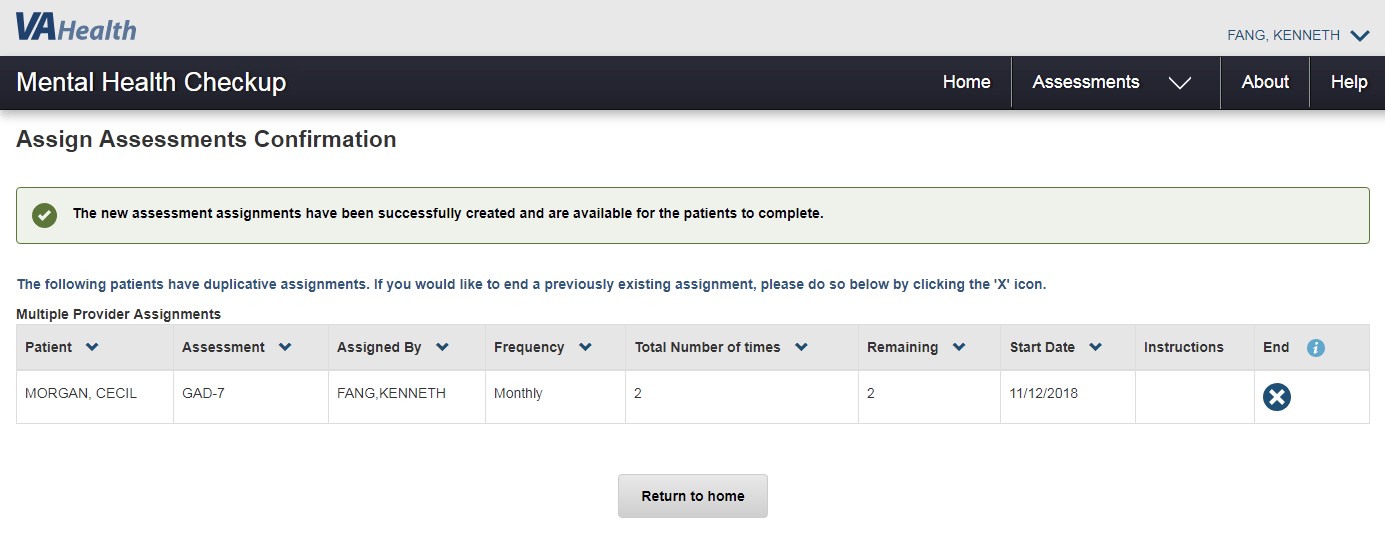
In the **Instructions** field, enter optional instructions for the patient.

Tap **Send>** once the values have been set for all assignments



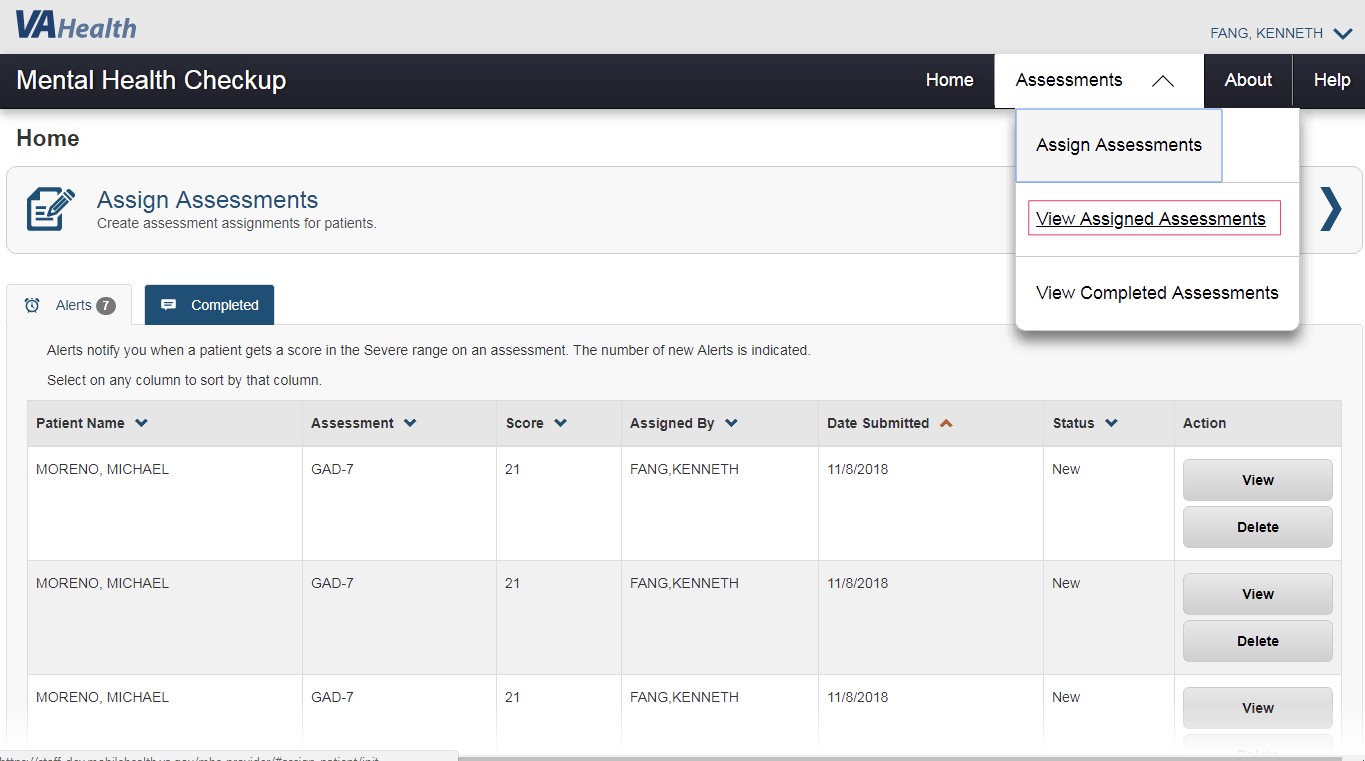
### Assign Assessments - Step 4 - Confirmation and Potential Duplicate Assignments

The provider will always receive a confirmation message once the assignment is created. Additionally the screen will display any potential duplicative assignments. A potential duplicative assignment occurs when the patient had an existing active assignment for an assessment and another assignment for that same assessment was just created. This may be a valid scenario where one provider could assign a patient an assessment to take Weekly for example and another provider could assign the same patient the same assessment on a more frequent basis. The provider who made the most recent assignment can review the potential duplicative assignments and can end any previous assignments if needed. If the assignments are ended, the provider who assigned the assignment that was ended will receive a “Multiple Providers” event that will display on the “Multiple Providers” tab on their Home Page.

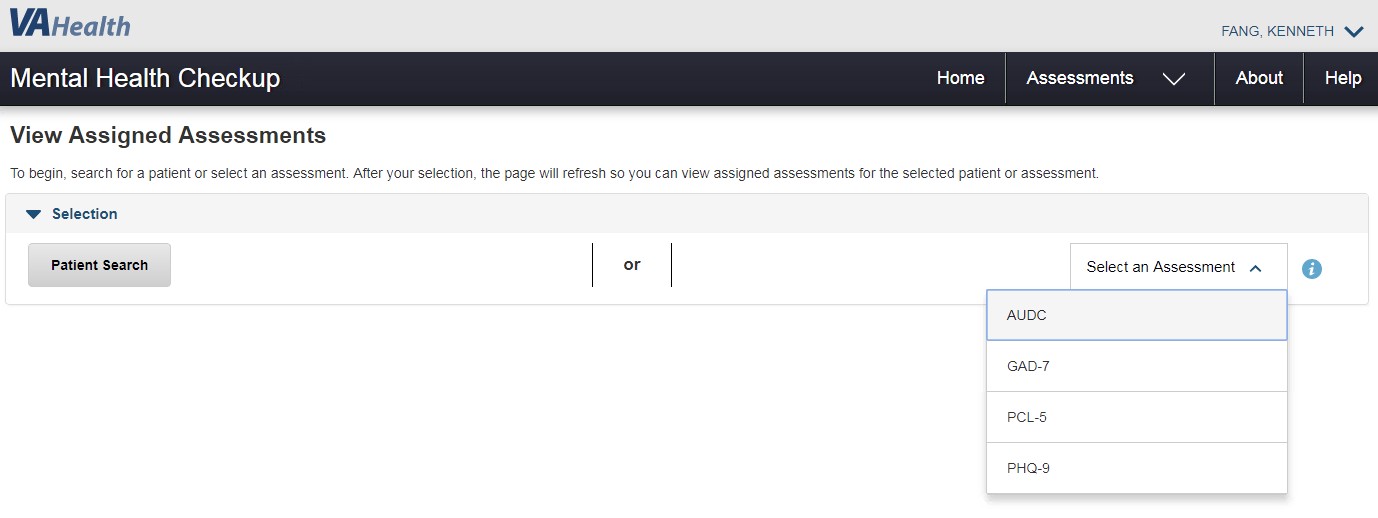


## View Assigned Assessments

This feature allows the Provider to view assignments for a patient OR view assignments based on assessment name. Tap menu, and then tap View Assigned Assessments to display the View Assigned Assessments screen begin the process.

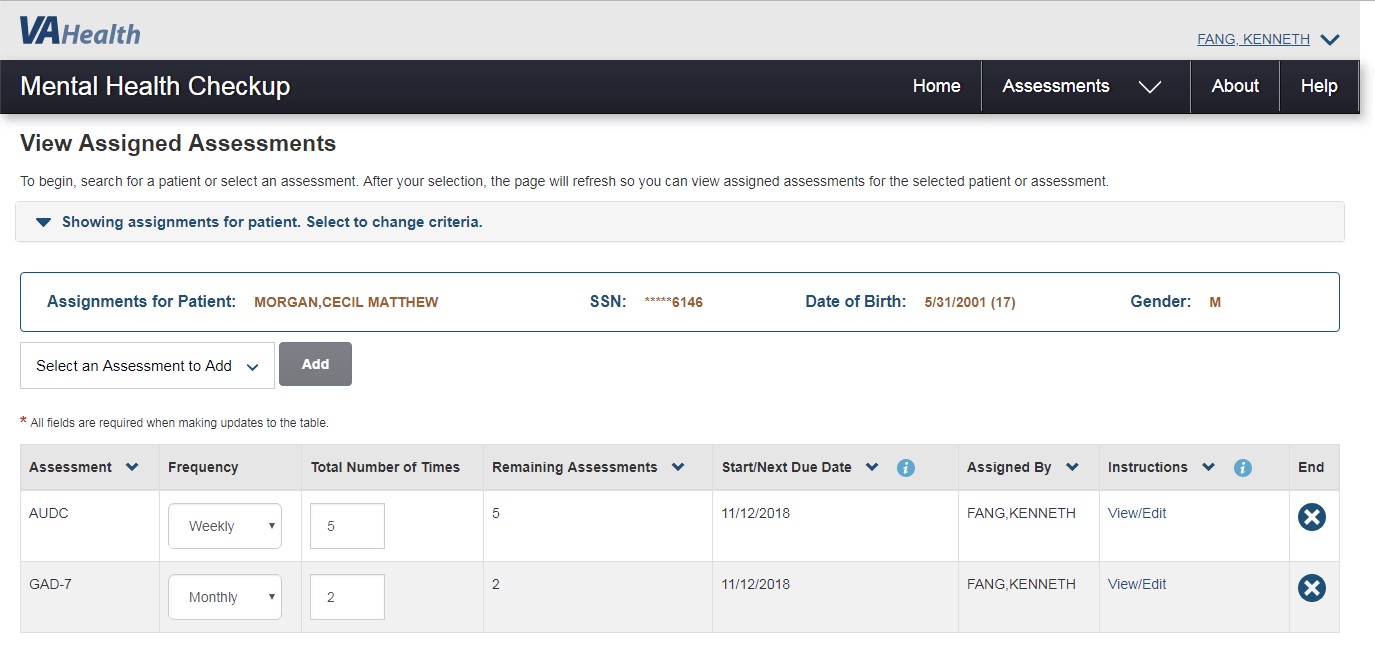


You can then tap **Patient Search** to search for a patient and view all active assignments for that patient or select the **Assessment** to view a list of all patients who currently have that assessment assigned.



### View Assigned Assessments by Patient

This feature allows the provider to view all assignments for a patient regardless of which provider made the assignment. Search and select a patient to begin the process. Refer to [Patient Search](#_bookmark43) above for additional details. Once a patient is selected the following screen will be displayed.

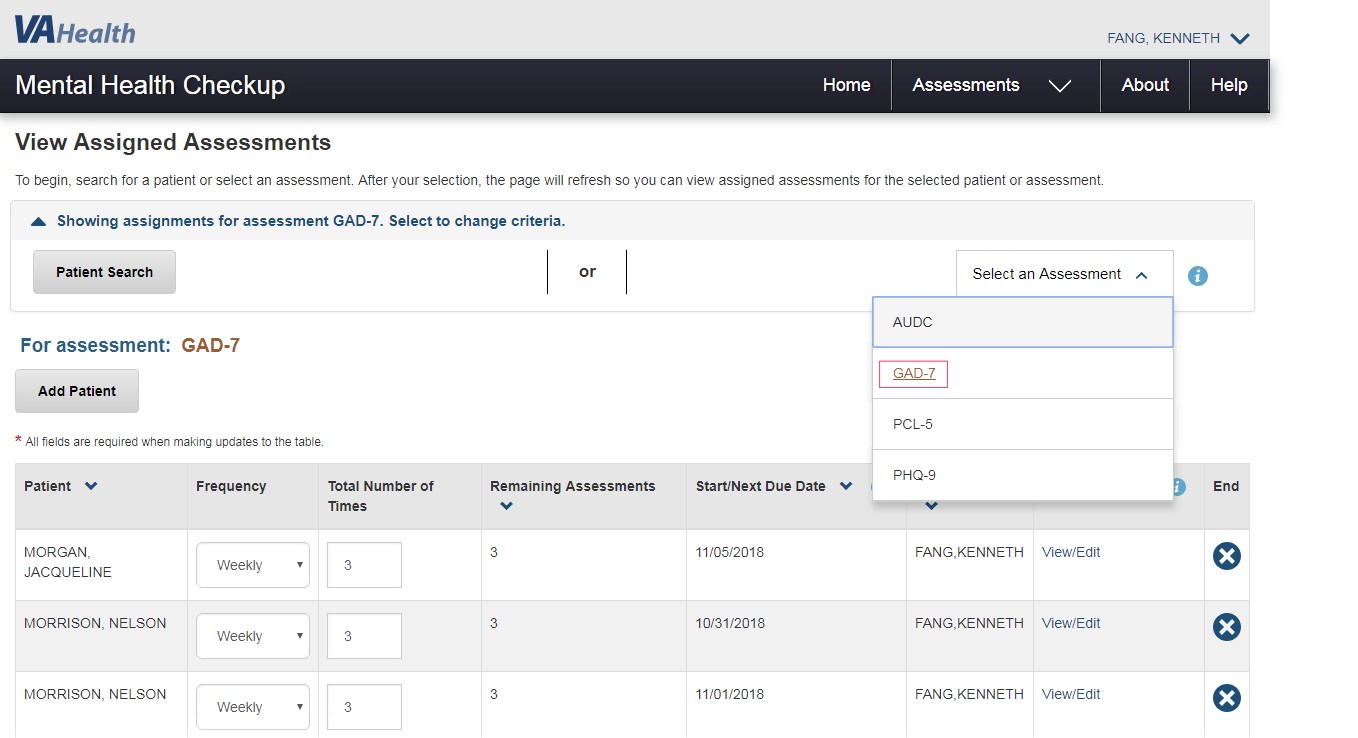


The list will display all active assignments for the Patient selected. The provider can review the list of assignments. The list will initially be displayed in order by Assessment Name. Each column can be sorted. This screen has several functions:

1. The provider can update the Frequency and/or the Total Number of Times on the existing assignments. (Note: The Total Number of Times must be greater than or equal to the Remaining Assessments). When all needed information has been entered, the user must press **Save Changes** and confirm them before they are saved.
2. The provider can end an assignment by pressing the **“X”** next to the assignment to end**.** The removal of the assignment must be confirmed before it is applied.
3. The provider can add a new assignment by selecting the assessment he wishes to assign to the patient and tapping **Add.** Once the Assessment is selected, the assessment name and default information will be displayed in the list. The provider must select the Frequency, enter a Total Number of Times, override the defaulted start date of the current date if needed and optionally, enter instructions. When all needed information has been entered, the user must press “Save Changes” and confirm them before they are saved and the assignment is made. If potential duplicative assignments were created they will be displayed. Refer to [Assign](#_bookmark47) [Assessments - Step 4 - Confirmation and Potential Duplicate Assignments](#_bookmark47) for additional information.

### View Assigned Assessments by Assessment

This feature allows the Provider to view all assignments they created for a specific assessment name. **Select** an **assessment name** to begin the process. Note: This view does not contain assessments assigned by other providers.



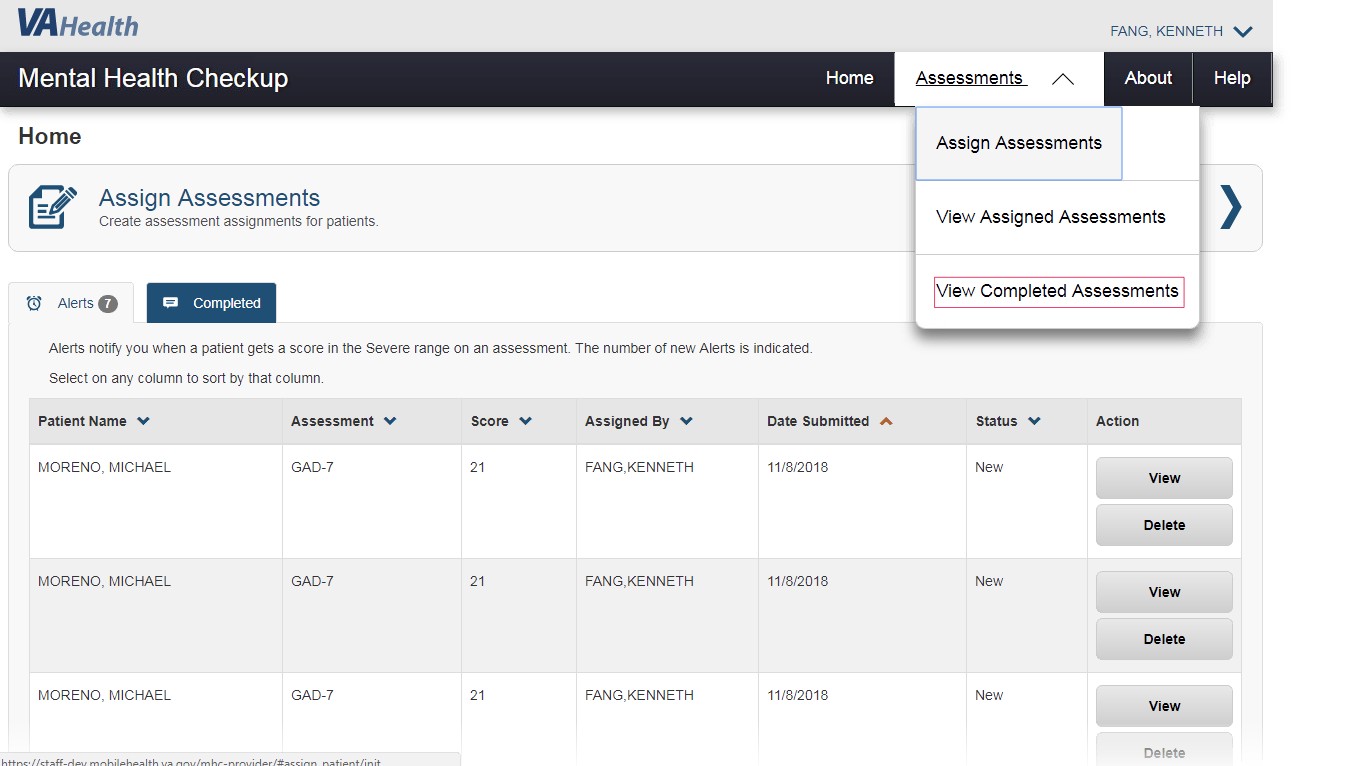
The list will display all assignments for patients who have active assignments for the Assessment Name selected. The Provider can review the list of assignments. The list will initially be displayed in order by patient name. Each column can be sorted. This screen has several functions:

1. The Provider can update the Frequency and/or the Total Number of Times on the existing assignments. (Note:The Total Number of Times must be greater than or equal to the Remaining Assessments).When all needed information has been entered, the user must press **Save Changes** and confirm them before they are saved.
2. The Provider can end an assignment by pressing the **“X”** next to the assignment to end**.** The removal of the assignment must be confirmed before it is applied.
3. The Provider can add a new assignment by tapping **Add Patient,** then searching and selecting the patient he wishes to assign the assessment to**.** Once the Patient is selected, their name along with the assessment will be displayed in the list.The Provider must select the Frequency, enter a Total Number of Times, override the defaulted start date of the current date if needed and optionally, enter instructions.When all needed information has been entered, the user must press **Save Changes** and confirm them before they are saved and the assignment is made. If potential duplicative assignments were created they will be displayed.Refer to[Assign Assessments - Step](#_bookmark47) [4 - Confirmation and Potential Duplicate Assignments](#_bookmark47)for additional information.

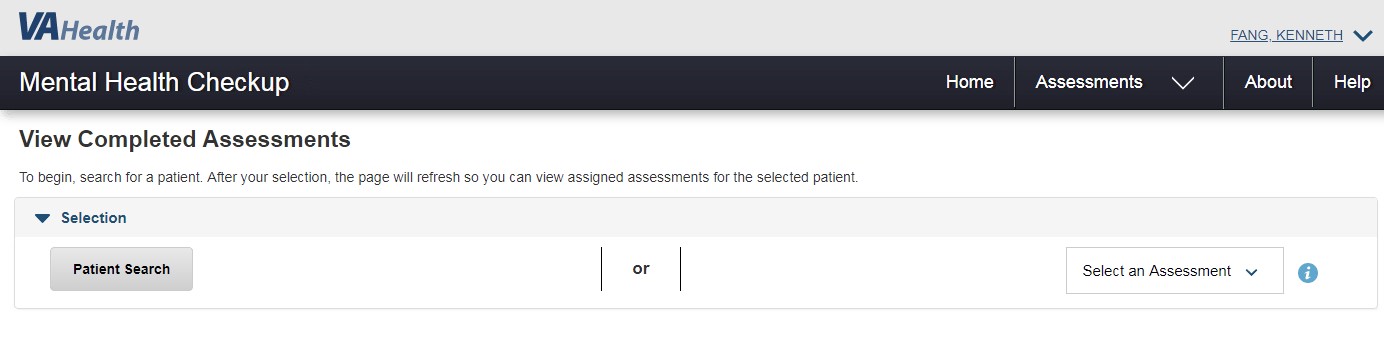
## View Completed Assessments

To view a list of completed assessments use the following steps.

On the Home screen, tap menu, and then tap View Completed Assessments.



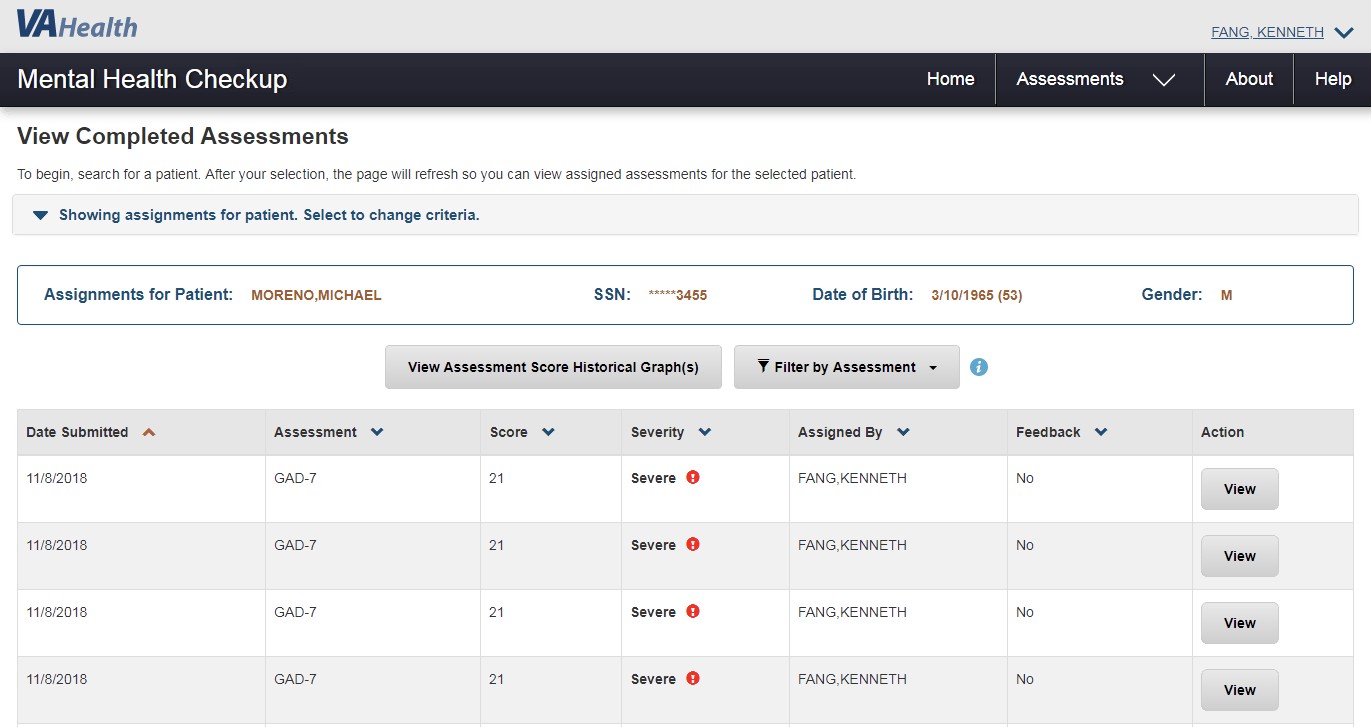
The View Completed Assessments screen will display.



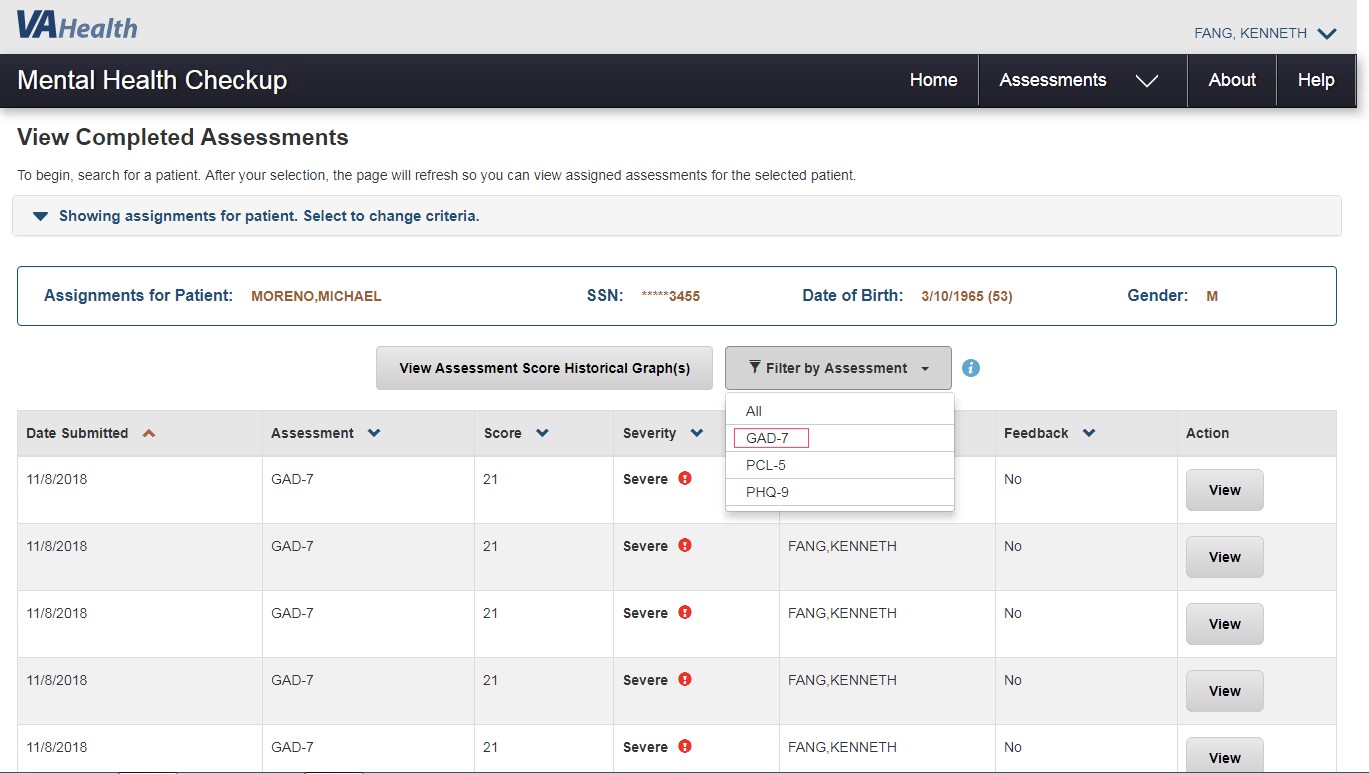
You can then tap **Patient Search** to search for a patient and view all completed assignments for that patient or select the **Assessment** to view a list of all patients who have completed the selected assessment.

### View Completed Assessments by Patient

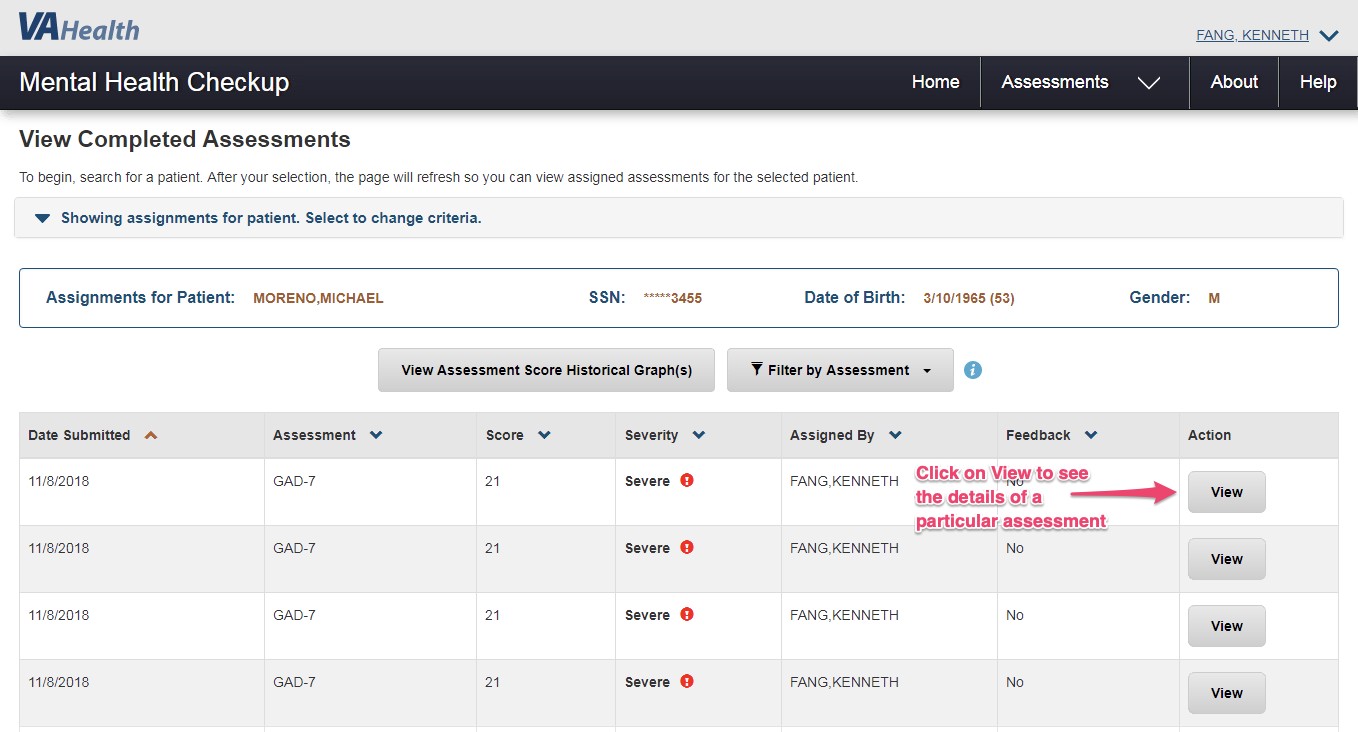
This feature allows the provider to view all assignments for a patient regardless of which provider made the assignment. Search and select a patient to begin the process. Refer to [Patient Search](#_bookmark43) above for additional details. Once a patient is selected the following screen will be displayed.



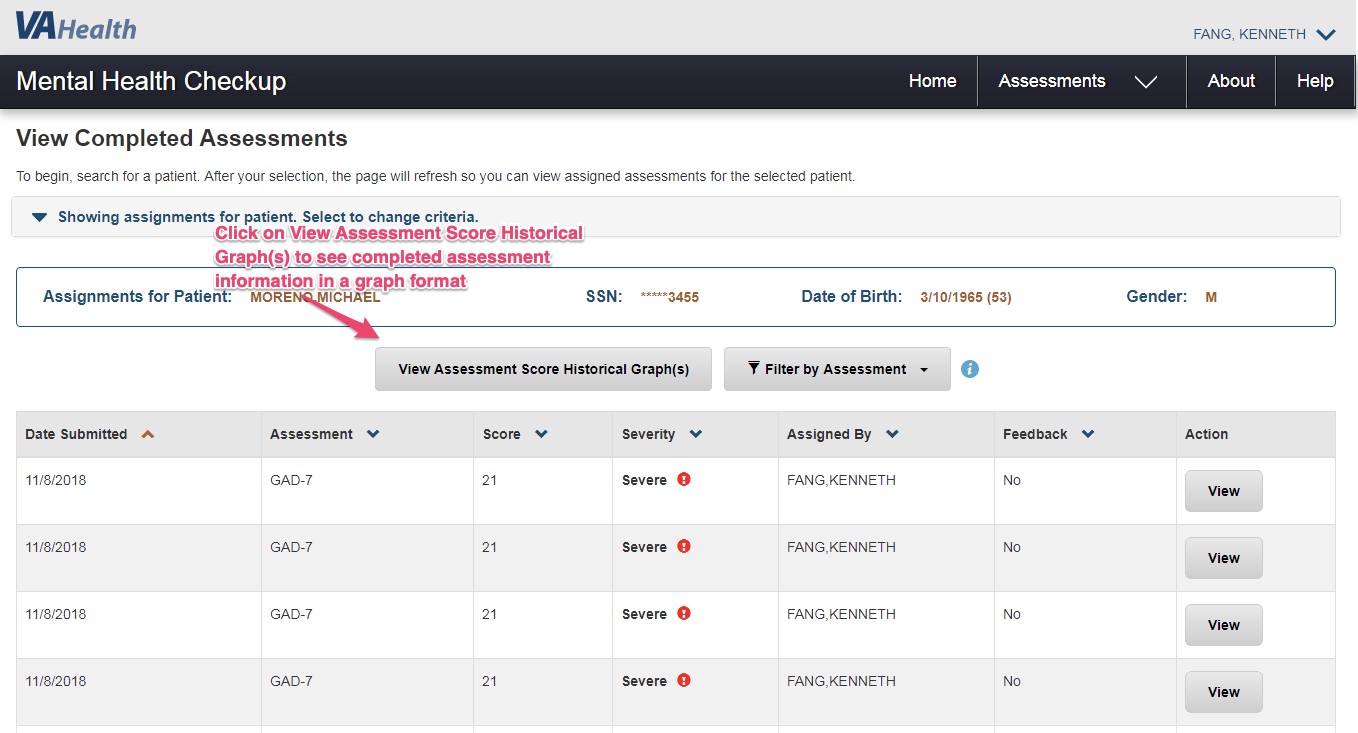
The list will display each completed assessment for the selected patient. The list will initially be sorted in most recent Date Submitted order. Each column can be sorted. The list can be filtered to only include the results for a particular assessment by tapping **Filter by Assessment** and choose the Assessment Name you wish to filter to.



To view the detail for a specific completed assessment, tap **View**.

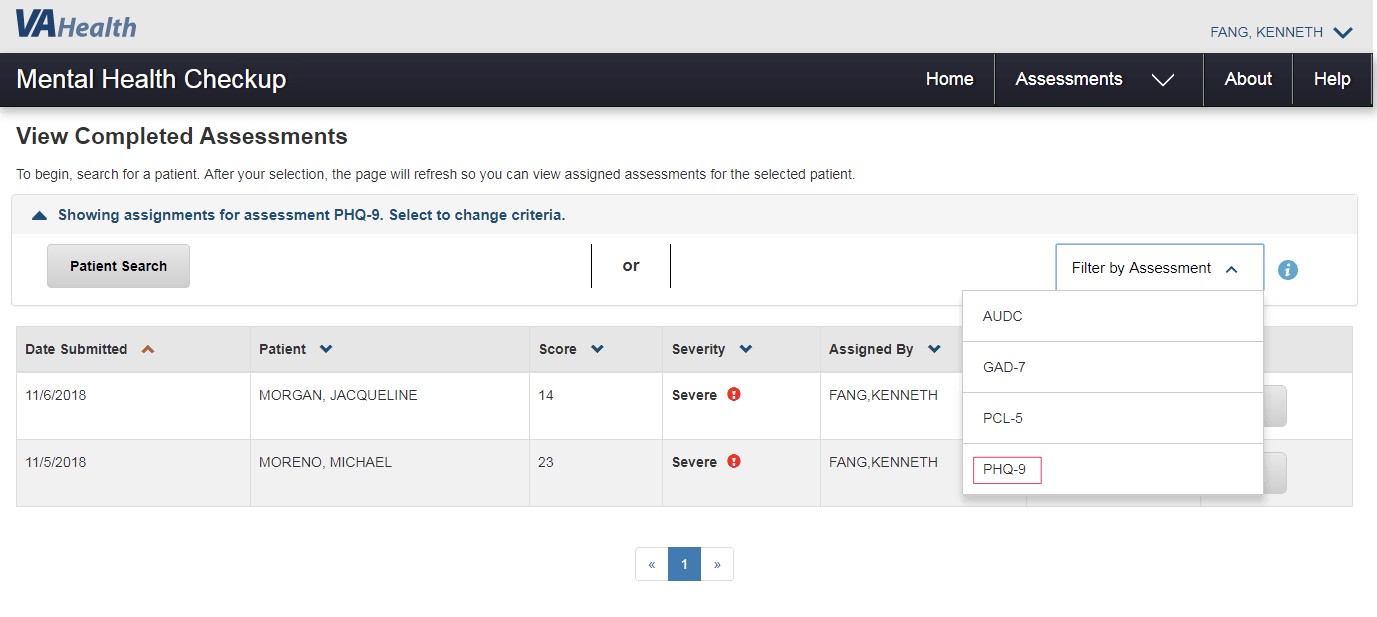


To view the completed detail information in graph form, tap **View Assessment Score Historical Graph**.

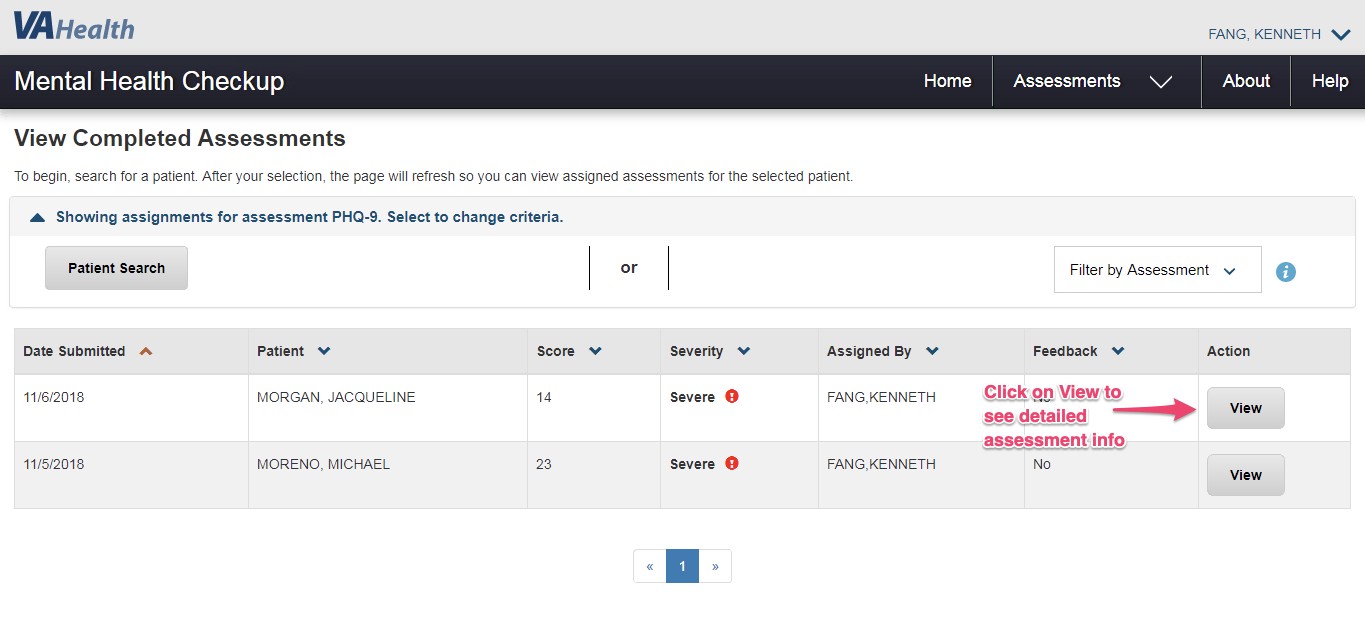


### View Assigned Assessments by Assessment

This feature allows the Provider to view all completed assignments they created for a specific assessment name. **Select** an **assessment name** to begin the process. Note: This view does not contain assessments assigned by other providers.

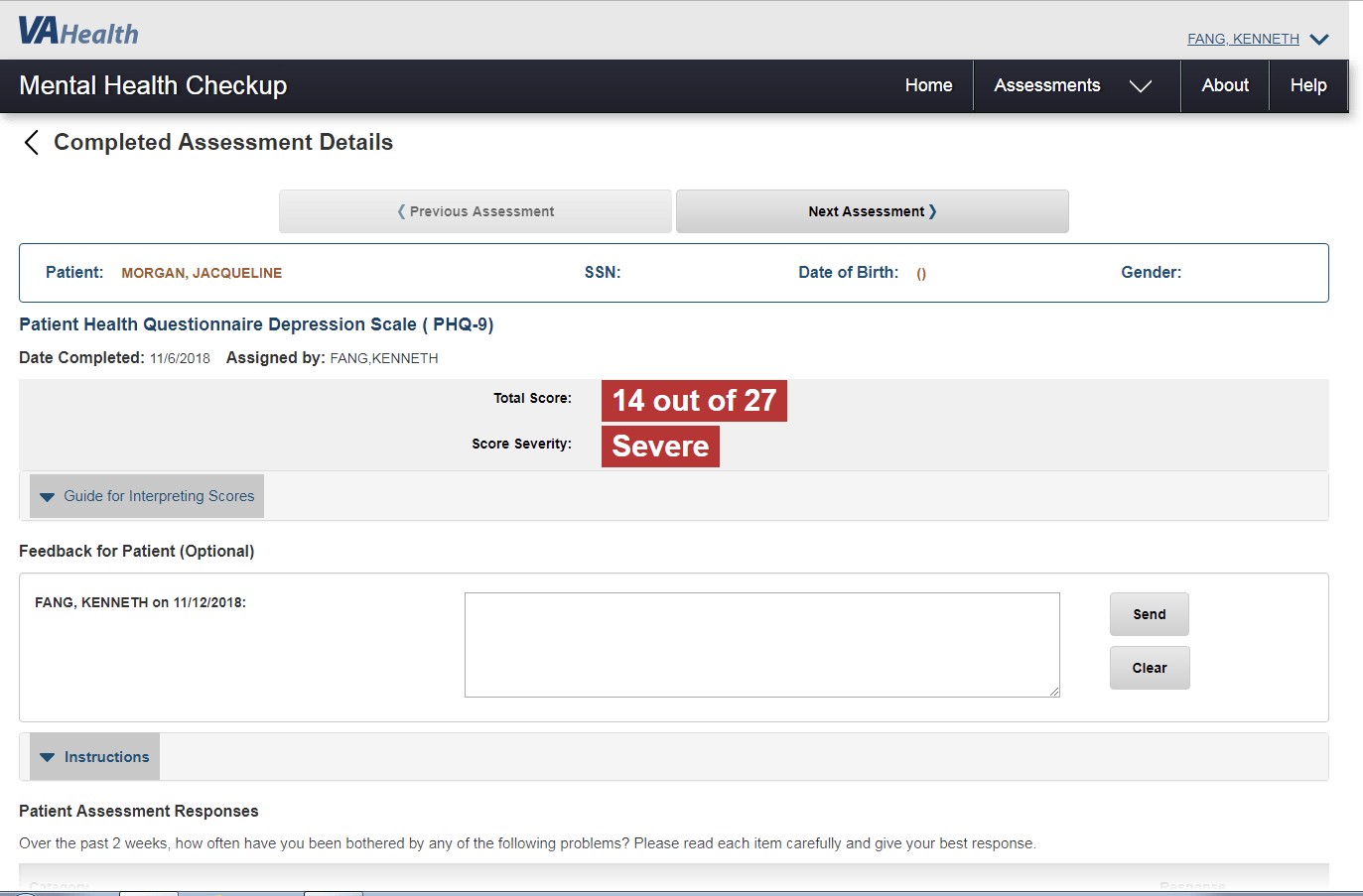


The list will display each completed assessment for the selected assessment. The list will initially be sorted in most recent Date Submitted order. Each column can be sorted. To view the detail for a specific completed assessment, tap **View**.



### View Completed Assessment Detail

From any of the completed assessment listing pages, if the **View** button is clicked for a particular assessment, the details of the assessment will be shown:

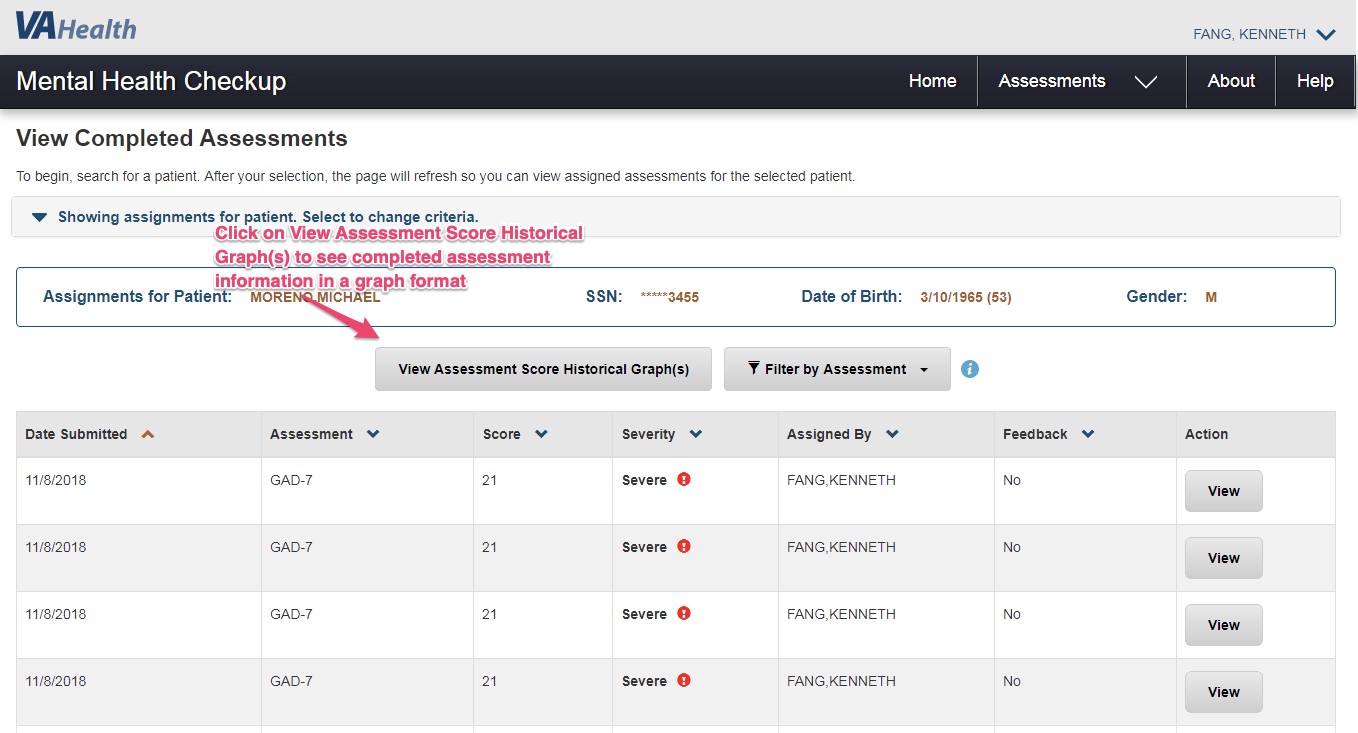


The detail will vary based on assessment, score, severity, and if previous feedback has been entered. If desired, the Provider can send feedback to the Patient by entering the desired feedback and tapping **Send**. The Provider will receive a message notifying them the feedback was sent.

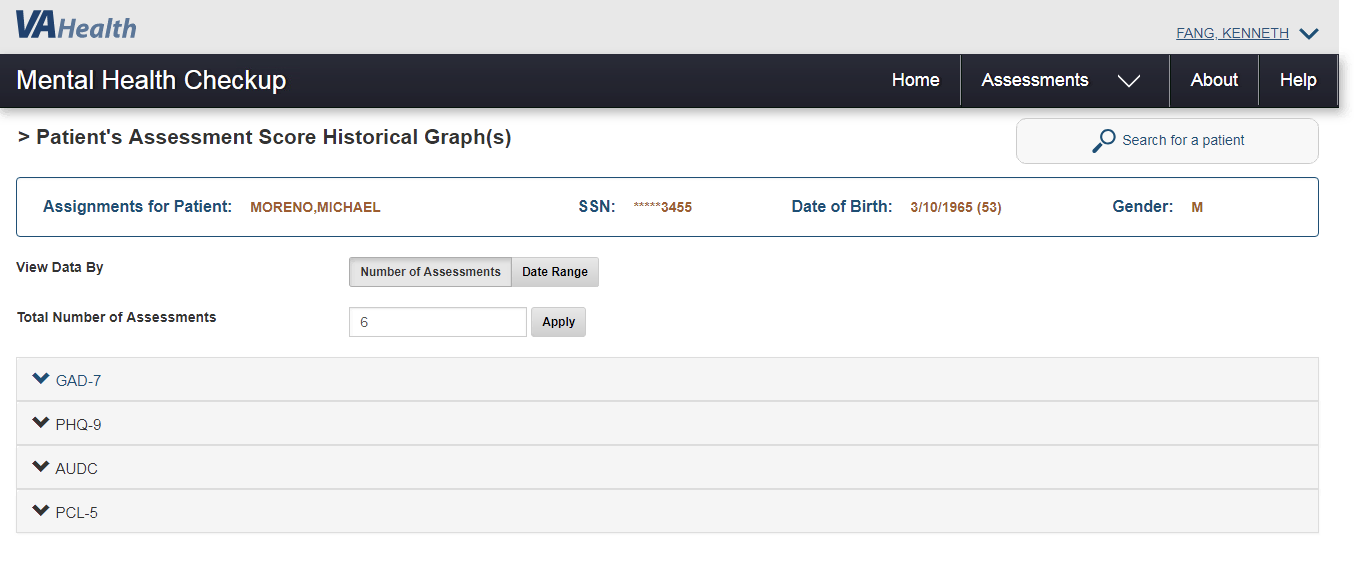
The Patient will know that Feedback was sent since they will now see “New” in the Feedback column on their Home Page Completed tab.

### View Assessment Score Historical Graph

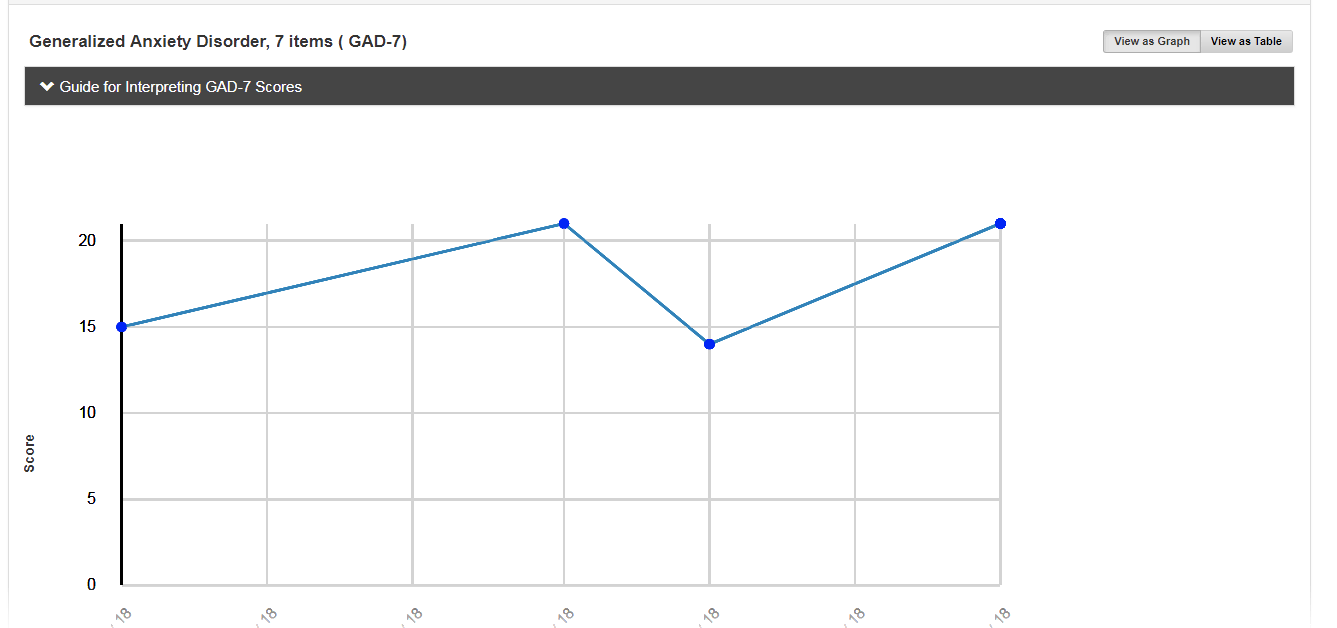
To view the completed assessment scores in Historical Graph or Table format, tap **View Assessment Score Historical Graph(s)** from the Completed Assessment List.



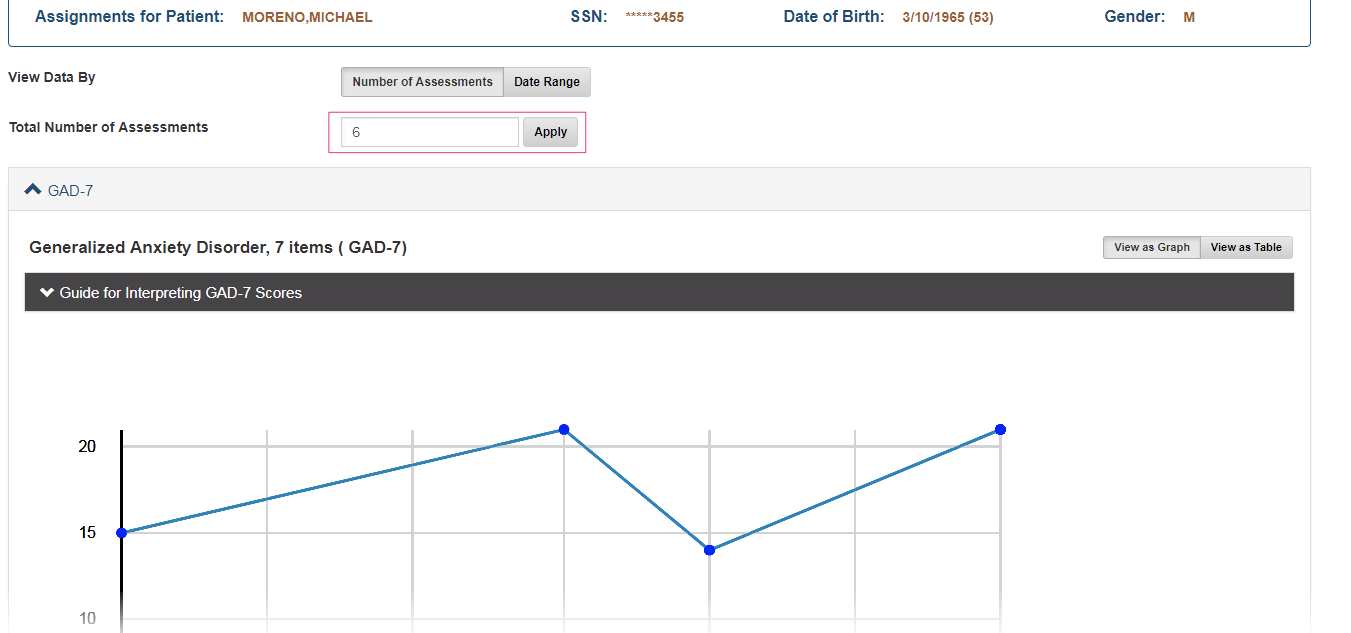
Each Assessment Type that the patient has completed an assessment for will be displayed in an accordion that can be expanded:



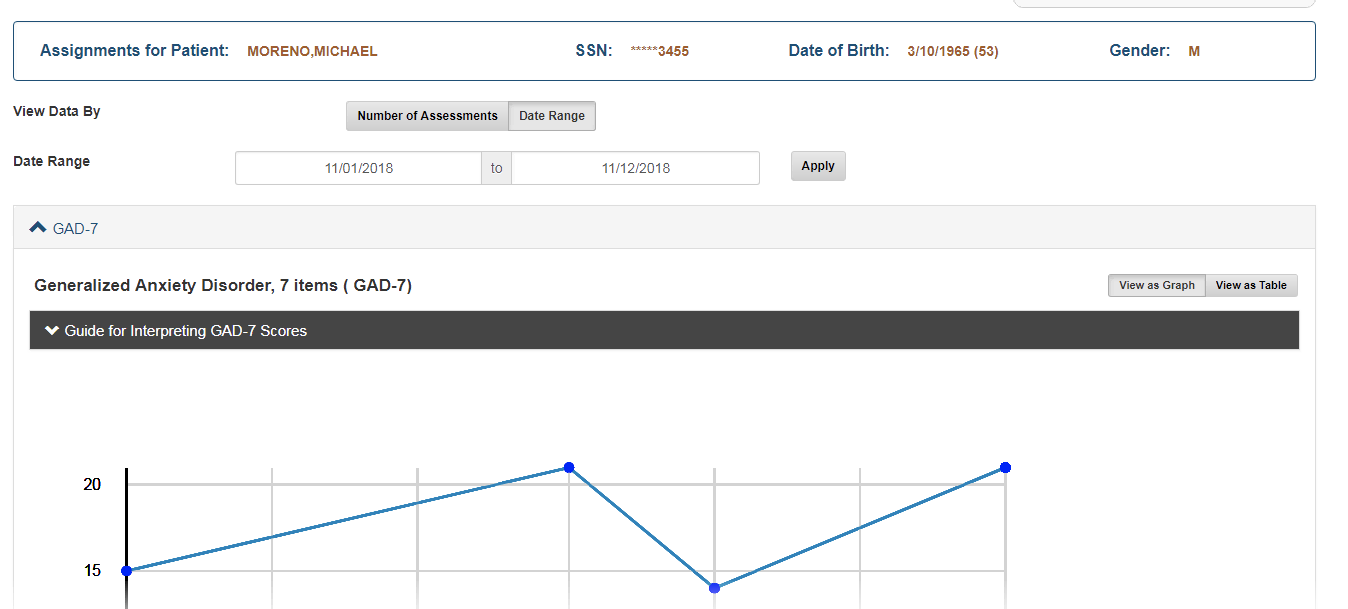
Once the assessment type is expanded, the default view is “View as Graph” with all completed assessments represented by a dot on the graph.



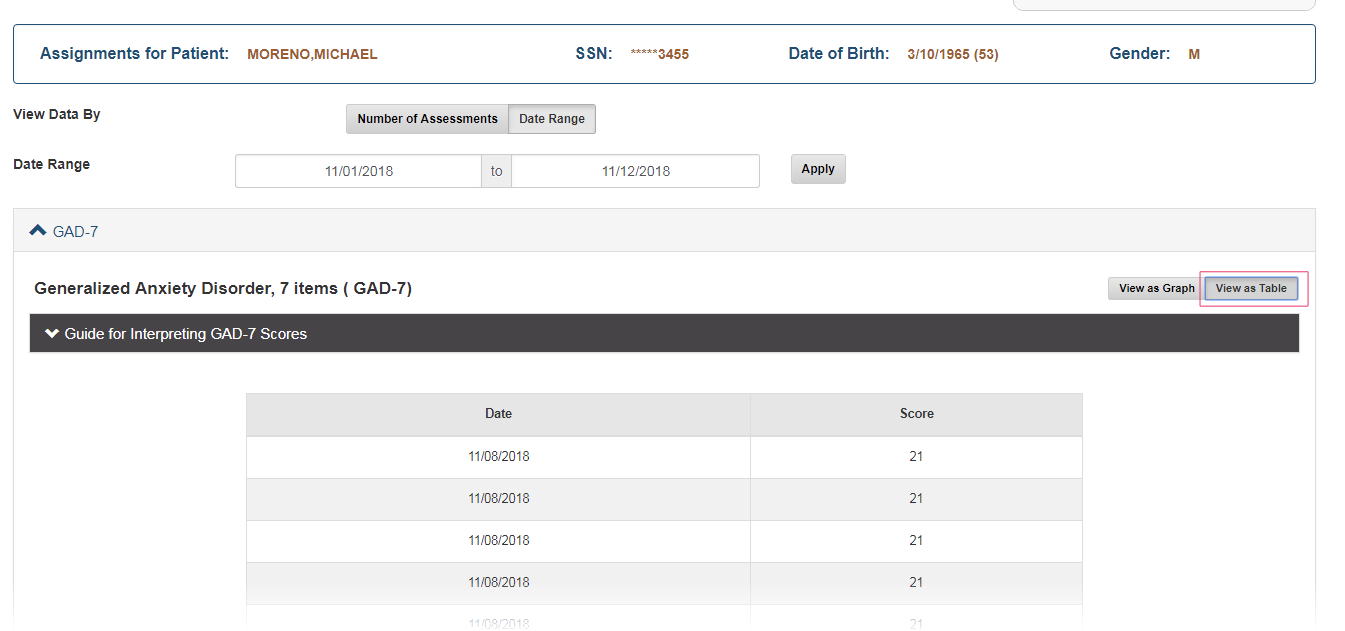
The provider can filter the graph to only include a specific number of assessments by tapping **Number of Assessments** and entering the desired number to display:



The provider can also filter the graph to include assessments within a specific date range by tapping **Date Range** and selecting the from and to dates to include and tapping **Apply**.



If you want to view the details in table mode, tap **View as Table**.



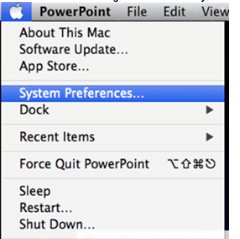
# Troubleshooting

## Apple Macintosh Users

### Missing Vertical Scrollbars

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

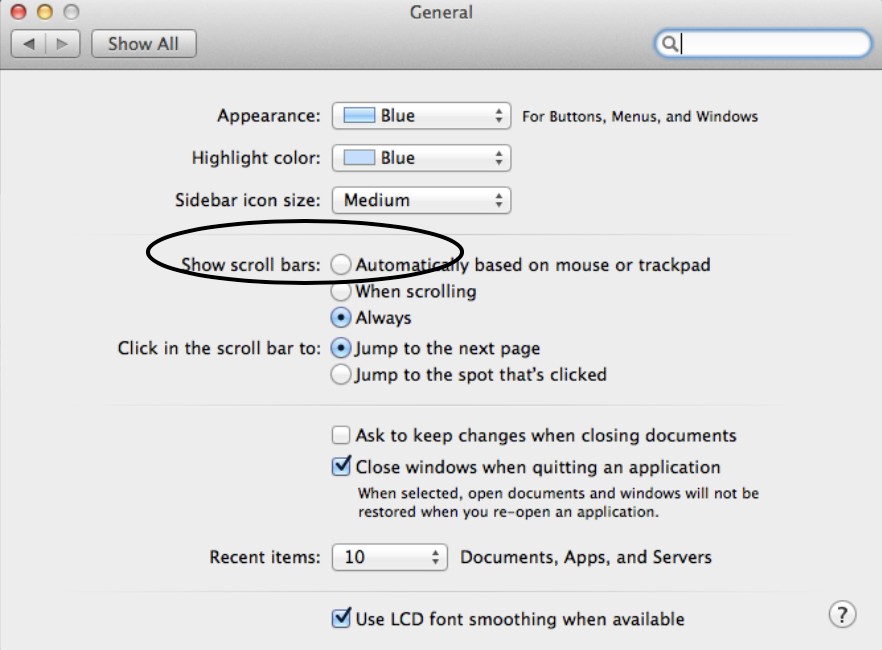
Click on the **Apple Logo**. Then **System Preferences**.



Click on the **General** logo.



Select the appropriate radio button to update the Show Scroll Bars section to **Always**.



The VA Mental Health Checkup screens should now show the vertical scrollbars