

# **Veterans Choice Program Community Provider Portal**

## **Community Provider User Guide**



**February 2017**

**Department of Veterans Affairs  
Office of Information and Technology (OI&T)**

## Revision History

NOTE: The revision history cycle begins once changes or enhancements are requested after the document has been baselined.

Date	Revision	Description	Author
2/9/16	0.0	Initial draft	CPP Team

## 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 CPP end users. It is usually written by a technical writer, although it can also be written by programmers, product or project managers, or other technical staff. Most user guides contain both a written guide and the associated images. In the case of computer applications, it is usual to include screenshots of the human-machine interfaces, and hardware manuals often include clear, simplified diagrams. The language used is matched to the intended audience, with jargon kept to a minimum or explained thoroughly. The User Guide is a mandatory, build-level document, and should be updated to reflect the contents of the most recently deployed build. The sections documented herein are required if applicable to your product.

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# 1. Introduction

## 1.1. Purpose

The purpose of this guide is to familiarize users with the important features and navigational elements of the Veterans Choice Program (VCP) Community Provider Portal (CPP).

### 1.1.1. Disclaimers

#### 1.1.1.1. Software Disclaimer

*This software was developed at the Department of Veterans Affairs (VA) by employees of the Federal Government in the course of their official duties. Pursuant to title 17 Section 105 of the United States Code this software is not subject to copyright protection and is in the public domain. VA assumes no responsibility whatsoever for its use by other parties, and makes no guarantees, expressed or implied, about its quality, reliability, or any other characteristic. We would appreciate acknowledgement if the software is used. This software can be redistributed and/or modified freely if any derivative works bear some notice that they are derived from it, and any modified versions bear some notice that they have been modified.*

#### 1.1.1.2. 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.*

### 1.1.2. Documentation Conventions

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

Descriptive text is presented in a proportional font (as represented by this font).

User's responses to online prompts (e.g., manual entry, clicks, etc.) will be **boldface** type.

## 2. System Summary

The Community Provider Portal (CPP) is a web-based system that facilitates interactions between employees in the VHA's Community Care department and Community Care Providers outside the VHA. The system is designed to improve the data gathering, documentation continuity, and workflow efforts for of the Department of Veterans Affairs (VA) Community Provider referral process.

The system:

- Creates a mechanism to enable the direct relationship between the VHA and Community Care Providers (i.e. Providers outside the VHA) so that VHA can develop a new network of Providers in accordance with the tenets set forth in the Veteran's Choice Act (i.e. VACAA)
- Implements a consistent user experience for Community Care Providers interacting with the VHA
- Increases the flow of content and relevant care information between Community Care Providers and the VHA
- Provides information via the web that encourages the use of a lower-cost distribution channel and reduces the administrative burden of the VHA back-office administration staff
- Improves the consistency and format of the content and the information transmitted between Community Care Providers and VHA
- Integrates with and Data Access Service (DAS). In the future, CPP will also integrate with Veterans Benefits Management System (VBMS), VISTa, VISTa Imaging, Fee Basis Claims System (FBCS), Community Provider Profile system (CPP), and Contract Payment and Reporting Module (CPRM).

### 2.1. System Configuration

CPP users require a computer that provides access to the VA network, as well as, login credentials (typically a VA user name, password and PIV card).

### 2.2. User Roles

User roles are defined as responsibilities or privileges for various users of the system and are associated with an action that can be performed within the CPP system. CPP implements internal functionality by determining if a user has the responsibility or privilege to perform a certain action based on that user's role(s).

### 2.3. User Access Levels

CUI provides 2 levels of Community Provider access.. For all user roles, a user's privileges define the features of the system that a user can access—and how elements in those areas appear—as well as the operations a user can perform within those areas. The following table provides more details.

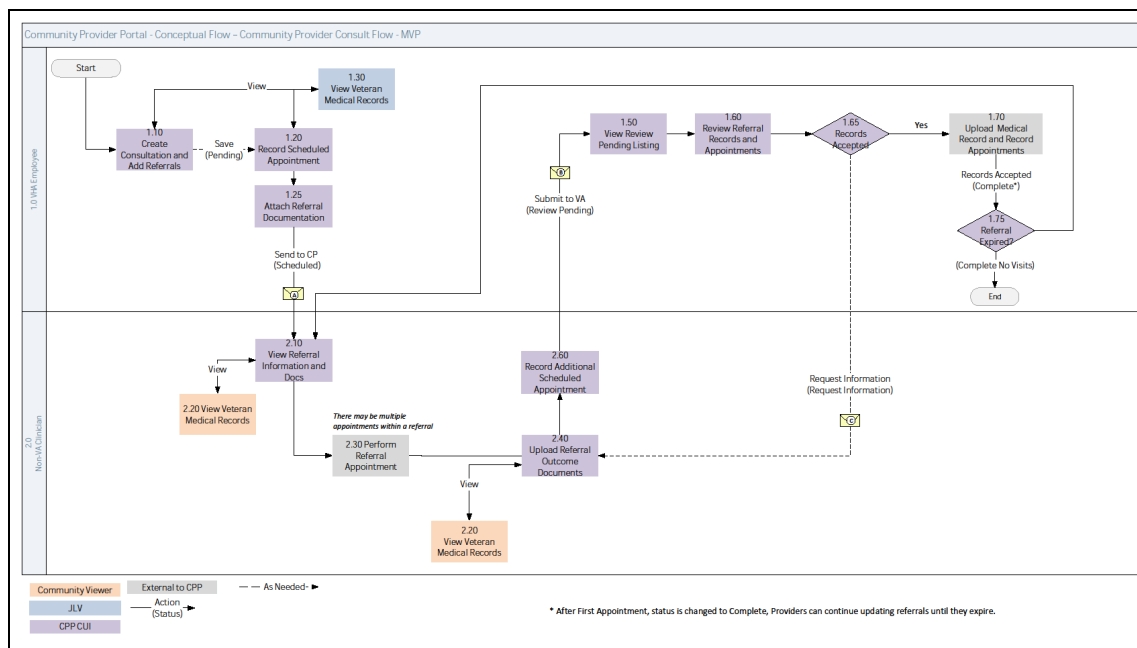
**Table 1. Community Provider User Roles and Privileges**

User Role	Privileges
Scheduler	Add/Modify/delete appointments
Community Provider	View referrals Add appointments Add/modify/delete documents Enter notes Submit referrals the VHA Add/update/submit SARs

## 2.4. Workflow

**Error! Reference source not found.** provides a high-level, overview of that illustrates how VHA Employees and Community Care Providers interact with Consultations, Referrals and SARs.

**Figure 1: Community Care Provider Portal Workflow Diagram**



## 3. Getting Started

This section provides a general introduction to CPP from signing in to the system to a description of the landing page.

### 3.1. Sign In

To sign in to CPP, complete the following steps:

1. For the proof of concept, open your web browser to [cpp.veracityconsulting.com](http://cpp.veracityconsulting.com)
2. The system displays the following:

**Figure 2. VA Clinician User Interface (CUI) Sign-in Page**

VA Clinician User Interface

You need to sign in before continuing.

You are accessing a U.S. Government information system. This information system is provided for U.S. Government-authorized use only. Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties. Use of this system may be monitored.

**Sign in**

Email

Password

☐ Remember me

**Log in**

[Forgot your password?](#)

[Didn't receive unlock instructions?](#)

[Sign in with SAML](#)

3. Enter Email
4. Enter Password
5. Click the **Log in** button. The system displays the CPP Dashboard:

## 3.2. CPP Dashboard

After signing in to CPP, the system displays a dashboard or home page with the following elements:

- The **System Name** link, which returns the user to the dashboard, when clicked from any page in the site.
- Sign in status message in the upper left
- Your name as text in the upper right
- A **Supporting Apps** drop-down in the upper right that allows you to access a menu of application to which you have access based on your role (see **Error! Reference source not found.**)
- A **Sign out** button in the upper right
- The **Referrals** tab which provides access to Referral Queues and filters that can be used to find specific referrals that need processing.
- **Help** and **Feedback** links in lower right

Figure 3 shows a sample landing page—or dashboard—for a Community Provider.

**Figure 3. Community Provider Dashboard**



VA Clinician User Interface v2.1.20161128a-35e614b
Ben Carson | Supporting Apps | Sign out

Signed in successfully.

Referrals

VA Referrals

Referral Queues

Scheduled (143)  
Review Pending (145)  
Request Information (144)  
Complete (143)

Filter

Date: From - To

Coordinator: Select Coordinator

First Name: First Name

Referral: Select Referral Type

Last Name: Last Name

Category of Care: Select Care of Category

Authorization#: Authorization

Status:
☐ Scheduled
☐ Complete
☐ Review Pending
☐ Complete No Visits
☐ Request Information

Consult#: 20170207-AA

Reset Filter

Filter

Patient Name	Referral	Date	Status	Coordinator	Authorization#	Consult#
Jane Billy Jones, 4th	MD Office Visit	2017-02-07	Review Pending	VHA CC TestUser	20170207-AA-01	20170207-AA

Showing 1 to 1 of 1 entries

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The Supporting App menu is customized with the options appropriate for each role.  
The Supporting Apps menu options are shown in **Error! Reference source not found.**

**Table 2. Supporting Apps by User Role**

User Role	Supporting Apps
Community Provider	Community Viewer  ePrescribing?  Direct  Virtru Pro  EHR system(s)
Scheduler	TBD

## 4. View Referral Queue

The Referral Queues allow you to quickly see referrals in specific statuses.

1. Click the **Queue** link for the type of referral you would like to view. The results set will be populated with all records that match the criteria specified in the selected queue.

Figure 4. Referral Queues on the Community Providers Dashboard

**VA Clinician User Interface v2.1.20161128a-f3a798f** | Ben Carson | Supporting Apps | Sign out

Signed in successfully.

### Referrals

#### VA Referrals

**Referral Queues**

- Scheduled (143)
- Review Pending (143)
- Request Information (143)
- Complete (143)

**Filter**

Date: From - To

Coordinator: Select Coordinator

First Name: First Name

Referral: Select Referral Type

Last Name: Last Name

Category of Care: Select Care of Category

Authorization#: Authorization

Status: ☐ Scheduled ☐ Complete No Visits  
☐ Complete ☐ Request Information  
☐ Review Pending

Consult#: Consultation

[Reset Filter](#) [Filter](#)

Patient Name	Referral	Date	Status	Coordinator	Authorization#	Consult#
Jane Doe Smith, 0th	EMG	2017-02-07	Review Pending	VHA CC TestUser	xyzy-01-0001-0002	01-0000
Jane Doe Smith, 0th	Inpatient Surgery	2017-02-07	Complete	VHA CC TestUser	xyzy-01-0001-0004	01-0000
Jane Doe Smith, 0th	Physical Therapy Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-01-0001-0008	01-0000
Jane Doe Smith, 0th	Radiology-CT Scan	2017-02-07	Request Information	VHA CC TestUser	xyzy-01-0001-0010	01-0000
Jane Doe Smith, 0th	Radiology-MRI	2017-02-07	Complete No Visits	VHA CC TestUser	xyzy-01-0001-0012	01-0000
Jane Doe Smith, 0th	EMG	2017-02-07	Review Pending	VHA CC TestUser	xyzy-01-0001-0016	01-0000
Jane Doe Smith, 0th	Inpatient Surgery	2017-02-07	Complete	VHA CC TestUser	xyzy-01-0001-0018	01-0000
Jane Doe Smith, 0th	MD Office Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-01-0002-0000	01-0001
Jane Doe Smith, 0th	Inpatient Surgery	2017-02-07	Request Information	VHA CC TestUser	xyzy-01-0002-0002	01-0001
Jane Doe Smith, 0th	Physical Therapy Visit	2017-02-07	Complete No Visits	VHA CC TestUser	xyzy-01-0002-0004	01-0001

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2. The Queues display records based on the following criteria:
  - Scheduled: Referral Status = Scheduled
  - Review Pending: Referral Status = Review Pending
  - Request Information: Referral Status = Request Information
  - Complete: Referral Status = Complete No Visits

The number in parentheses following the name of each queue indicates how many records will appear in that queue.

Note: Once ticket is complete, update to the following:

- New: Referral Status = Scheduled
- Submitted: Referral Status = Review Pending
- Information Needed: Referral Status = Request Information
- Complete No Visits: Referral Status = Complete No Visits

The following table describes the various referral statuses.

**Table 3. Referral Status Descriptions**

<b>Status</b>	<b>Description</b>
Scheduled	Scheduled referrals have the 1 <sup>st</sup> appointment scheduled. After you have seen the patient, upload medical records on the Document tab and click the Return to VA button to send them back to the VA for review and inclusion in the patient's official medical record.
Review Pending	Review Pending referrals have been sent to the VHA review. When referrals are in this status, no action is needed unless another appointment occurs and more medical records need to be uploaded.
Request Information	Request Information referrals need additional Medical Records. If the VHA reviews a referral and determines that additional information is needed, you will be notified of that a Request Information referrals exist and receive a description of the necessary information via email. Alternatively, you can check the "Request Information" queue to see if it contains any referrals. Once the necessary medical records have been uploaded, click the "Return to VA" button to return the referral to the VHA.
Complete	Complete referrals have been reviewed by the VHA and contain all of the necessary Medical Records after the first appointment. The Medical records have been reviewed and uploaded into the patient's official medical record in CPRM. Referrals that require multiple appointments will remain in the Complete status until all appointment have occurred.
Complete No Visits	Complete No Visit Referrals require no additional appointments. The referral is essentially closed. It remains visible for 30 extra days in case additional medical records need to be added.

## 5. Search for and Referral

1. On the Referral Landing page, enter one or more criteria in the Filter area at the top of the page and click the **Filter** button. The table below will be populated with records that match the selected criteria.

Figure 5. Filtering Referrals

VA Clinician User Interface v2.1.20161128a-f3a798f

VHA CC TestUser | Supporting Apps | Sign out

Signed in successfully.

**Referrals** | Consultations

**Community Provider Referrals** [Export Data](#)

**Referral Queues**

- Pending (143)
- Active (143)
- Scheduled (143)
- Review Pending (143)
- Request Information (143)
- New Appointments
- Medical Record Letters

**Filter**

Date: From - To

Authorization #: Authorization

First Name: First Name

Consult #: Consultation

Last Name: Last Name

Category of Care: All

SSN: XXX-XX-XXXX

Referral: All

Coordinator: All

VISN: All

Status: ☒ Pending ☐ Request Information ☐ Active ☐ Review Pending ☐ Scheduled ☐ Complete No Visits ☐ Complete

Facility: All

Provider: All

[Reset Filter](#) **Filter**

Patient Name	Referral	SSN	Date	Status	Coordinator	Provider	VISN:Facility
Jane Doe Smith, Oth	Occupational Therapy Visit	321-23-7700	2017-02-07	Pending	VHA CC TestUser	Provider Name #0006	8: Facility Name #0006
Jane Doe Smith, Oth	Radiology-Ultrasound	321-23-7700	2017-02-07	Pending	VHA CC2 TestUser	Provider Name #0013	19: Facility Name #0013
Jane Doe Smith, Oth	Radiology-CT Scan	321-23-7700	2017-02-07	Pending	VHA CC2 TestUser	Provider Name #0010	15: Facility Name #0010
Jane Doe Smith, Oth	Radiology-CT Scan	321-23-7700	2017-02-07	Pending	VHA CC TestUser	Provider Name #0024	8: Facility Name #0024
Jane Doe Smith, Oth	Radiology-CT Scan	321-23-7700	2017-02-07	Pending	VHA CC2 TestUser	Provider Name #0038	4: Facility Name #0038
Jane Doe Smith, Oth	Radiology-MRI	321-23-7700	2017-02-07	Pending	VHA CC TestUser	Provider Name #0012	17: Facility Name #0012
Jane Doe Smith, Oth	Labs	321-23-7700	2017-02-07	Pending	VHA CC2 TestUser	Provider Name #0033	21: Facility Name #0033
Jane Doe Smith, Oth	Radiology-MRI	321-23-7700	2017-02-07	Pending	VHA CC TestUser	Provider Name #0054	6: Facility Name #0004
Jane Doe Smith, Oth	Radiology-MRI	321-23-7700	2017-02-07	Pending	VHA CC2 TestUser	Provider Name #0012	17: Facility Name #0012
Jane Doe Smith, Oth	Radiology-MRI	321-23-7700	2017-02-07	Pending	VHA CC TestUser	Provider Name #0040	6: Facility Name #0040

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2. Move your cursor over the result to highlight the row of the record you would like to edit.

Figure 6. Selecting Record on the VHA Coordinator Dashboard

VA Clinician User Interface v2.1.20161128a-f3a798f Ben Carson | Supporting Apps | Sign out

Signed in successfully.

**Referrals**

**VA Referrals**

**Referral Queues**

- Scheduled (143)
- Review Pending (143)
- Request Information (143)
- Complete (143)

**Filter**

Date: From - To

Coordinator: Select Coordinator

Referral: Select Referral Type

Category of Care: Select Care of Category


Status: ☒ Scheduled ☐ Complete No Visits ☐ Complete ☐ Request Information ☐ Review Pending

[Reset Filter](#) [Filter](#)

Patient Name	Referral	Date	Status	Coordinator	Authorization#	Consult#
Jane Doe Smith, 0th	Physical Therapy Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-01-0001-0008	01-0000
Jane Doe Smith, 0th	MD Office Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-01-0002-0000	01-0001
Jane Doe Smith, 0th	MD Office Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-01-0002-0014	01-0001
Jane Doe Smith, 0th	Inpatient Surgery	2017-02-07	Scheduled	VHA CC TestUser	xyzy-01-0003-0006	01-0002
Jane Doe Smith, 0th	Occupational Therapy Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-01-0004-0012	01-0003
Jane Doe Smith, 0th	Occupational Therapy Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-01-0005-0004	01-0004
Jane Doe Smith, 0th	Occupational Therapy Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-01-0005-0018	01-0004
Joe Billy Jones, 1st	Inpatient Surgery	2017-02-07	Scheduled	VHA CC TestUser	xyzy-02-0006-0010	02-0000
Joe Billy Jones, 1st	MD Office Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-02-0007-0002	02-0001
Joe Billy Jones, 1st	MD Office Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-02-0007-0016	02-0001

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- Click to open the desired record. The Referral Detail page will appear.

## 6. View Referral, Add Appointments, Upload Medical Documents

1. After locating a referral, by clicking on one of the queues, or searching for a specific record, click the desired record to open it.

The page displays tabs for the various parts of the Referral.

- a. Access the Referral Details tab for information about the Veteran and the referral.
- a. Access the Appointments tab to view, schedule, modify or delete appointments
- b. Access the Documents tab to view and add Medical Records
- c. Access the Notes tab to see actions that have taken place in relation to the referral.

Figure 7. Viewing the Referral Details Tab

The screenshot displays the 'VA Clinician User Interface v2.1.20161128a-f3a798f'. At the top, it shows the user 'Ben Carson' and options for 'Supporting Apps' and 'Sign out'. The 'Referrals' tab is selected. The referral details for 'Jane Doe Smith, Oth' are shown, including a 'Physical Therapy Visit' referral type and a 'Scheduled' status. The 'Overview' section provides patient information (Name, SSN, Address), coordinator details (VHA CC TestUser), and ordering physician information. The 'Community Provider' section lists details for a provider named 'Provider Name #0008'. The 'Requested Service' section includes ICD-10 diagnosis codes, procedure codes, and treatment details. A justification for care is provided at the bottom: 'Veteran cannot travel to VA facility due to geographical inaccessibility'.

VA Clinician User Interface v2.1.20161128a-f3a798f

Ben Carson | Supporting Apps | Sign out

Referrals

Patient: Jane Doe Smith, Oth Consultation: Chiropractic #01-0000 Period of Validity: 02-01-2017 - 02-28-2017

Last Updated: 2017-02-07 19:47:46 UTC

Return to VA

Referral: Physical Therapy Visit Scheduled

Referral Details

Overview

Name: Jane Doe Smith, Oth  
SSN: 321-23-7700  
Address: 1000 Any Street Blvd, P.O. Box 1000, Columbia, MD 21046  
Ordering Physician: Physician Name #0000  
Order: Evaluate and Recommend  
Request Priority: Urgent  
Category of Care: Chiropractic

Coordinator: VHA CC TestUser  
Date: 2017-02-07 19:47:46 UTC  
Authorization #: xyzzy-01-0001-0008  
VISN: 10: VA Healthcare System  
Facility: Facility Name #0008

Community Provider

Is the Ordering Provider performing the service? No  
Community Provider: Provider Name #0008  
NPI: 19530603-0008  
Specialty: Physician/Interventional Pain Management, Physician/Gastroenterology, Physician/Internal Medicine  
Address: 0008 Any Street Blvd, P.O. Box 0008, Bossier City, LA 71111  
Telephone Number: 318-555-0008  
Fax Number: 202-555-0008

Requested Service

Please see the Referral Package on the Documents tab for additional details.  
ICD-10 Diagnosis Code(s): Z47.89, C79.11, S72.39, V91.88  
Procedure Code(s): X2425  
Anticipated Dates: 9 days (Anticipated Dates of Service or Expected Length of Stay)  
Duration of Treatment/Procedure: 7 days (Length of time of treatments/procedures)  
Frequency of Treatment/Procedure: every 3 weeks (Number of treatments/Procedures per week(s) or month(s))  
Number of Visits: 4  
Justification for Care: Veteran cannot travel to VA facility due to geographical inaccessibility

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2. Select the Appointments tab

Figure 8. Viewing the Appointment Tab

VA Clinician User Interface v2.1.20161128a-f3a798f

Ben Carson | Supporting Apps | Sign out

Referrals

Patient: Jane Doe Smith, 0th Consultation: Chiropractic #01-0000 Period of Validity: 02-01-2017 - 02-28-2017

Last Updated: 2017-02-07 19:47:46 UTC

Return to VA

Referral: Physical Therapy Visit Scheduled

Referral Details

Appointments

Documents

Notes

Add New Appointment

Appointment Description:

Community Provider: Provider Name #0008 [Select Alternate Provider](#)

Appointment Date/Time:

Add Appointment

Type of Appointment	Scheduled By	Date
type two	Billy Boy, III	02/23/2017 19:45
type one	Joe Bob, Jr.	03/05/2017 19:45

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3. Enter the required data in the **Add New Appointment** box and click the **Add Appointment** button. The new appointment will be added to the Appointment table.



**Figure 9. Add Appointment Button on the Appointment Tab**

The screenshot displays the VA Clinician User Interface. At the top, a dark blue header contains the text "VA Clinician User Interface v2.1.20161128a-f3a798f" on the left and "Ben Carson | Supporting Apps | Sign out" on the right. Below the header, a light blue sidebar on the left lists navigation options: "Referrals", "Appointments" (selected), "Documents", and "Notes". The main content area is titled "Appointments" and features a form for adding a new appointment. The form includes fields for "Appointment Description:", "Community Provider: Provider Name #0008" (with a "Select Alternate Provider" link), and "Appointment Date/Time:". A red rectangle highlights the "Add Appointment" button. Below the form is a table with columns "Type of Appointment", "Scheduled By", and "Date". The table contains two entries: "type two" scheduled by "Billy Boy, III" on "02/23/2017 19:45", and "type one" scheduled by "Joe Bob, Jr." on "03/05/2017 19:45". At the bottom of the table, it says "Showing 1 to 2 of 2 entries" and includes "Previous", "1", and "Next" navigation links. The footer of the page includes the Department of Veterans Affairs logo and text, and links for "Feedback" and "Help".

4. To Edit an appointment, select the record in the table. The record will pre-populate in the form. Make any necessary changes and click the **Update** button. [Does button label toggle from Add to Update yet?] The updates will appear in the Appointments table.

5. Select the **Documents** tab to upload Medical Records

**Figure 10. Document Tab**

VA Clinician User Interface v2.1.20161128a-f3a798f

Ben Carson | Supporting Apps | Sign out

Referrals

Patient: Jane Doe Smith, Oth | Consultation: Chiropractic #01-0000 | Period of Validity: 02-01-2017 - 02-28-2017

Last Updated: 2017-02-07 19:47:46 UTC

Return to VA

Referral: Physical Therapy Visit Scheduled

Referral Details

Appointments

**Documents**

Notes

**Documents**

Add New Document

Document Name:  **Browse**

Document Type: Select document type:

**Add Document**

File Name	Document Type	Uploaded By	Reviewed By	Date
<a href="#">2016_rubykajsl.pdf</a>	Prescription	VHA CC2 TestUser		February 7, 2017 at 7:47 PM
<a href="#">1-10-500-500-100.jpg</a>	Referral Packet	Eric Wilson		February 7, 2017 at 7:47 PM

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6. Review the Referral Packet and any other Medical Records that may exist.
7. To upload medical records for the VA, select the **Browse** button. The Browse dialog box appears.
8. Select the medical record file and click the **Open** button. The name of the document will pre-populate the **File Name** field.
9. Click the **Add Document** button. The medical record will be added to the Documents table.
10. Documents that have not yet been sent to the VA can be edited if necessary. To edit a document, select the document in the table. The record will pre-populate in the form. Make any necessary changes and click the **Update** button. [Does button label toggle from Add to Update yet?]
11. Once all medical records have been uploaded, see section 6. **Return Referral to VA.**

12. Select the **Notes** tab to see activity related to the case.

**Figure 11. Review actions on the Notes tab**

The screenshot displays the 'VA Clinician User Interface v2.1.20161128a-f3a798f'. The top navigation bar includes the user 'Ben Carson', 'Supporting Apps', and a 'Sign out' link. The main content area is titled 'Referrals' and shows patient information: 'Patient: Jane Doe Smith, 0th', 'Consultation: Chiropractic #01-0000', and 'Period of Validity: 02-01-2017 - 02-28-2017'. A 'Return to VA' button is present. The 'Referral' type is 'Physical Therapy Visit' and the status is 'Scheduled'. On the left, a sidebar lists 'Referral Details', 'Appointments', 'Documents', and 'Notes' (which is selected). The 'Notes' section has a heading 'Notes' and a subheading 'Describe actions that have taken place in relation to the case.' Below this is a large text input area and a 'Submit' button. A table shows two entries:

User	Notes	Date
Joe Bob Billy Boy	This is referral_note #1 for referral #9 for consultation #1 for veteran #1	February 7, 2017 at 7:47 PM
Joe Bob Billy Boy	This is referral_note #0 for referral #9 for consultation #1 for veteran #1	February 7, 2017 at 7:47 PM

Below the table, it says 'Showing 1 to 2 of 2 entries' and has 'Previous', '1', and 'Next' navigation links. The footer includes the Department of Veterans Affairs logo and links for 'Feedback' and 'Help'.

- d. Review the actions that have taken place in relation to the case, such as status changes and requests for information. Notes: Communications between the Community Providers and the VA will remain in Direct messaging, so the notes field on this page will not be needed and will be removed in the next iteration.

## 7. Return Referral to VA

1. After the patient's appointment, all medical records need to be uploaded on the Documents tab. Once all medical records have been uploaded, click the **Return to VHA** button. This will notify the VA that the appointment is complete and allow them to add the new medical records to the patient's official medical record.
2. You may also click the **Return to VA** button if you wish to return the referral to the VA because you will not be seeing the patient.

Figure 12. Return Referral to the VA

The screenshot displays the VA Clinician User Interface. At the top, a dark blue header bar contains the text 'VA Clinician User Interface v2.1.20161128a-f3a798f' on the left and 'Ben Carson | Supporting Apps | Sign out' on the right. Below the header, a light blue sidebar on the left lists navigation options: 'Referrals', 'Referral Details', 'Appointments', 'Documents' (which is highlighted with a blue bar), and 'Notes'. The main content area has a light blue background. At the top of this area, a blue bar displays patient information: 'Patient: Joe Billy Jones, 1st', 'Consultation: Chiropractic #02-0000', and 'Period of Validity: 02-01-2017 - 02-28-2017'. Below this, a 'Referral:' dropdown menu is set to 'Inpatient Surgery' with a 'Scheduled' status. On the right side of the main area, a dark blue button labeled 'Return to VA' is circled in red. Below the referral information, there is a 'Documents' section. It includes an 'Add New Document' form with a 'Document Name' input field, a 'Browse' button, a 'Document Type' dropdown menu set to 'Select document type:', and an 'Add Document' button. Below the form is a table with the following data:

File Name	Document Type	Uploaded By	Reviewed By	Date
<a href="#">2016_rubykaigi.pdf</a>	Radiology Record	Mike Wallace		February 7, 2017 at 7:47 PM
<a href="#">1-10-500-500-100.jpg</a>	Radiology Record	Super Qtc		February 7, 2017 at 7:47 PM

Below the table, it says 'Showing 1 to 2 of 2 entries' and 'Previous 1 Next'. At the bottom of the interface, there is a footer bar with the Department of Veterans Affairs logo on the left and links for 'Feedback' and 'Help' on the right.

Figure 13. Return Referral to VA

VA Community Care Provider Portal v.0.0

Chip Patterson | Supporting Apps | Signout

Thomas Robert BayneConsult # 2818206 Non-VA NeurologyPeriod of Validity: Oct 01, 2016 - Sep 30, 2017X


Return Referral to VA

Have all medical records for the most recent appointment been updated?  
☒ Yes  
☐ No, see comments below.

Is the referral complete?  
☐ Yes  
☒ No, future appointments are expected  
☐ No, our practice was unable to provide the referred service for the following reason:  
Reason:

Comments:

Submit

 Department of Veterans Affairs

[? Help](#) [Feedback](#)

## 8. Switch to a Different Referral

1. With a referral open, select the **Referral** drop-down in the Referral Header from any tab in the referral and select a different referral. The page is refreshed with details related to the newly selected referral.

Figure 14. Navigate to Another Referral

The screenshot displays the VA Clinician User Interface. At the top, a dark blue header bar contains the text "VA Clinician User Interface v2.1.20161128a-f3a798f" on the left, and "VHA CC TestUser | Supporting Apps | sign out" on the right. Below the header, there are two tabs: "Referrals" (selected) and "Consultations". The main content area has a light blue background. At the top of this area, a blue bar displays "Patient: Jane Doe Smith, Dth", "Consultation: Dental #01-0001", and "Period of Validity: 01-01-2017 - 01-31-2017". Below this, a "Referral:" label is followed by a dropdown menu currently showing "Radiology-Ultrasound" and the status "Pending". A red box highlights the dropdown menu, which is open, showing a list of options: "Select community provider", "MD Office Visit", "Echocardiogram", "EMG", "Home Care Visit", "Inpatient Surgery", "Labs", "Occupational Therapy Visit", "Outpatient Surgery", "Physical Therapy Visit", "Radiology", "Radiology-CT Scan", "Radiology-Mammogram", "Radiology-MRI", and "Radiology-Ultrasound". The "Radiology-Ultrasound" option at the bottom of the list is highlighted with a red box. To the right of the dropdown menu, the status "Pending" is displayed. Below the status, a list of other possible statuses is shown: "Active", "Scheduled", "Review Pending", "Request Information", "Complete", and "Complete No Visits". At the bottom of the main content area, there is a dark blue button labeled "Update Referral Status". The footer of the page includes the Department of Veterans Affairs logo on the left and links for "Feedback" and "Help" on the right.

## 9. Provide Feedback on Site

1. From any page in the application, you can click the Feedback link in the footer to provide feedback to the creators of the application.

Figure 15. VHA Coordinator Dashboard

VA Clinician User Interface v2.1.20161128a-f3a798f

Signed in successfully.

Ben Carson | Supporting Apps | Sign out

**Referrals**

**VA Referrals**

**Referral Queues**

- Scheduled (143)
- Review Pending (143)
- Request Information (143)
- Complete (143)

**Filter**

Date: From - To

Coordinator: Select Coordinator

Referral: Select Referral Type

Category of Care: Select Care of Category

Authorization#: Authorization

Consult#: Consultation

Status:
 ☒ Scheduled
 ☐ Complete
 ☐ Review Pending
 ☐ Complete No Visits
 ☐ Request Information

Reset Filter Filter

Patient Name	Referral	Date	Status	Coordinator	Authorization#	Consult#
Jane Doe Smith, 0th	Physical Therapy Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-01-0001-0008	01-0000
Jane Doe Smith, 0th	MD Office Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-01-0002-0000	01-0001
Jane Doe Smith, 0th	MD Office Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-01-0002-0014	01-0001
Jane Doe Smith, 0th	Inpatient Surgery	2017-02-07	Scheduled	VHA CC TestUser	xyzy-01-0003-0006	01-0002
Jane Doe Smith, 0th	Occupational Therapy Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-01-0004-0012	01-0003
Jane Doe Smith, 0th	Occupational Therapy Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-01-0005-0004	01-0004
Jane Doe Smith, 0th	Occupational Therapy Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-01-0005-0018	01-0004
Joe Billy Jones, 1st	Inpatient Surgery	2017-02-07	Scheduled	VHA CC TestUser	xyzy-02-0006-0010	02-0000
Joe Billy Jones, 1st	MD Office Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-02-0007-0002	02-0001
Joe Billy Jones, 1st	MD Office Visit	2017-02-07	Scheduled	VHA CC TestUser	xyzy-02-0007-0016	02-0001

Showing 1 to 10 of 143 entries

Previous 1 2 3 4 5 ... 15 Next

Department of Veterans Affairs

[? Feedback ? Help](#)

2. On the Feedback form, your name and email address are pre-populated; however, they can be edited. Select a Topic from the drop-down, enter your feedback in the description box, and then click the **Submit** button. Your feedback will be sent to the application development team.

**Figure 16. Feedback Form**

The screenshot shows the 'VA Clinician User Interface v2.1.20161128a-f3a798f' header. On the right, it says 'Ben Carson | Supporting Apps | sign out'. A 'Referrals' tab is active. The main content area is titled 'About You' and contains two input fields: 'Name' with 'John Smith' and 'Email address' with 'jsmith@practicename.com'. Below this is a section titled 'Leave Your Feedback' with a 'Topic' dropdown menu set to 'Please select' and a large 'Description' text area. A 'Submit' button is at the bottom of the form. The footer includes the Department of Veterans Affairs logo and text, and links for 'Feedback' and 'Help'.

3. A “Thanks for your feedback” message appears at the top of the page, just below the header.

**Figure 17. Thank You Message**





## 10. Add SAR (Future Functionality)

1. On the Referral Landing page, highlight the desired **Referral** record and click to display the Referral record. The Referral Detail page will appear with the **Referral Details** tab selected.
2. Click the **Add SAR** button in the Referral header. The SAR Detail page appears.
3. Enter the required data and click the **Submit** button. The new SAR will be saved and sent to FBCS. Eventually, if a community provider will be providing the service, the SAR may flow back into CPP as a new Consultation.

# 11. Signout

1. Select the Signout link. The system signs you out of the system and re-displays the Sign In page, so you can sign on again.

Figure 18. Sign out Link in the Header

The screenshot displays the VA Clinician User Interface. At the top, a dark blue header bar contains the text "VA Clinician User Interface v2.1.20161128a-f3a798f" on the left, and "VHA CC TestUser | Supporting Apps | **Sign out**" on the right. The "Sign out" link is circled in red. Below the header, a green banner reads "Signed in successfully." The main content area is titled "Community Provider Referrals" and includes a sidebar with "Referral Queues" (Pending (143), Active (143), Scheduled (143), Review Pending (143), Request Information (143), New Appointments, Medical Record Letters) and a "Filter" section. The filter section contains fields for Date, First Name, Last Name, SSN, Coordinator, Authorization #, Consult #, Category of Care, Referral, VISN, Facility, and Provider, along with checkboxes for Status (Pending, Active, Scheduled, Complete) and Request Information, Review Pending, and Complete No Visits. A table below the filter shows a list of referrals with columns for Patient Name, Referral, SSN, Date, Status, Coordinator, Provider, and VISN:Facility. The table lists 10 entries for Jane Doe Smith, all with a status of "Pending". At the bottom of the table, it says "Showing 1 to 10 of 143 entries" and includes pagination links (Previous, 1, 2, 3, 4, 5, ..., 15, Next). The footer of the page includes the Department of Veterans Affairs logo and the text "Department of Veterans Affairs" on the left, and "? Feedback ? Help" on the right.

# **Appendix A. Frequently Asked Questions**

## **A.1. Topic**

### **Q. What questions shall we include?**

A. We'll include all questions that would provide value. As you test the site, please feel free to suggest FAQs that cross your mind.