# 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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**1.1. Purpose**

# Introduction

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).

### Disclaimers

#### 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.*

#### 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. 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.

# 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).

## 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).

## 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).

## 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.

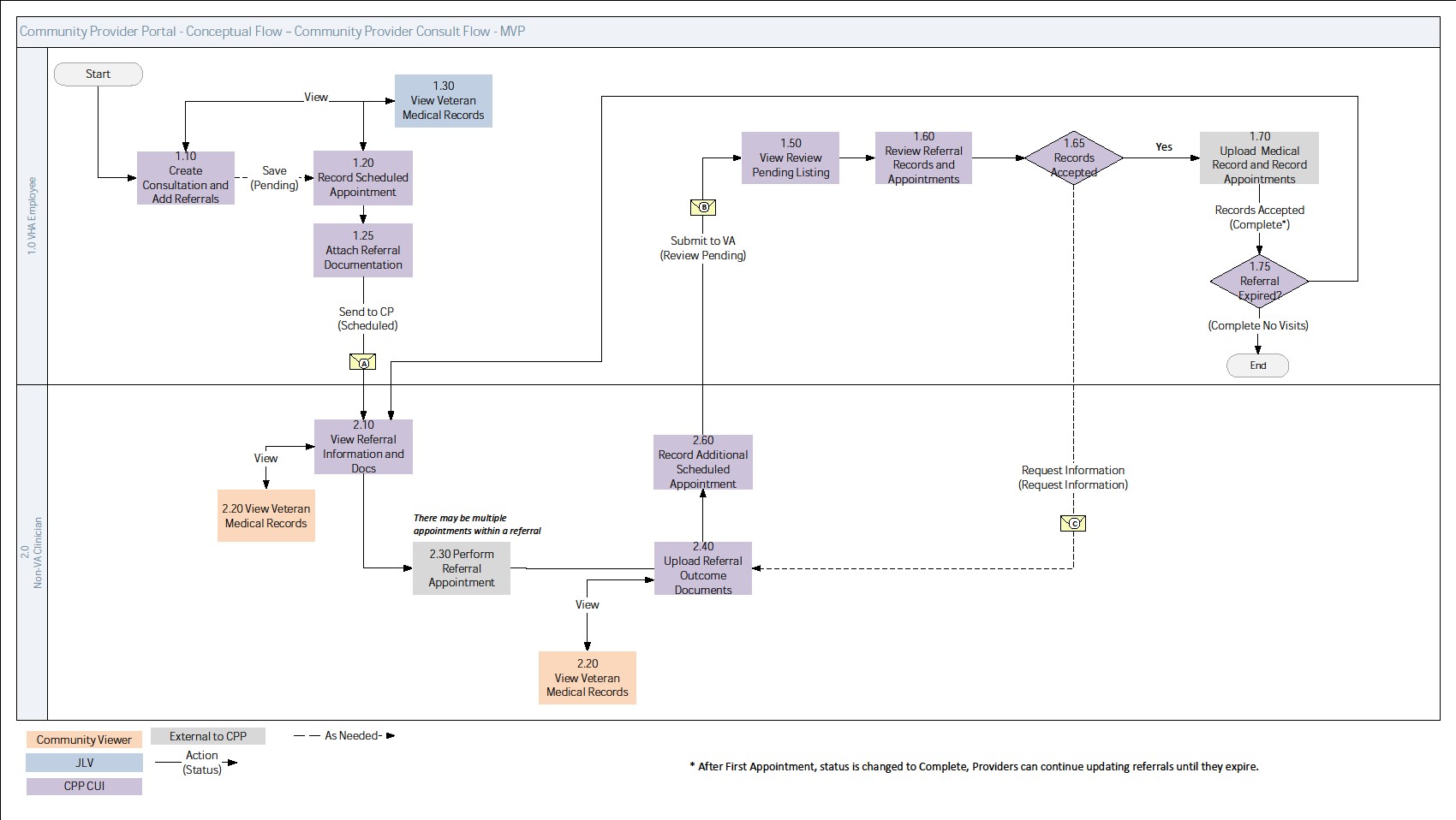
**Table 1. Community Provider User Roles and Privileges**

|  |  |
| --- | --- |
| **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 |

## 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**



# Getting Started

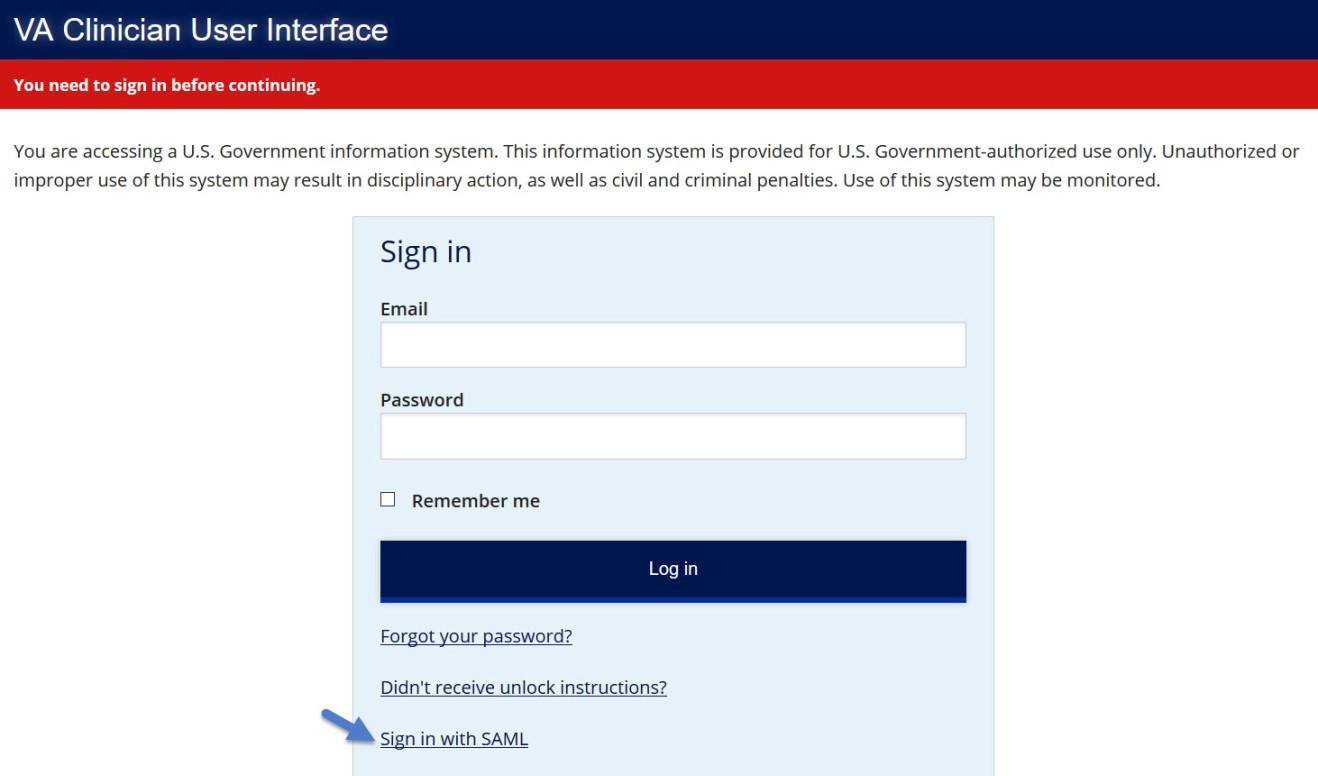
This section provides a general introduction to CPP from signing in to the system to a description of the landing page.

## 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
    2. The system displays the following:

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



* + 1. Enter Email
    2. Enter Password
    3. Click the **Log in** button. The system displays the CPP Dashboard:

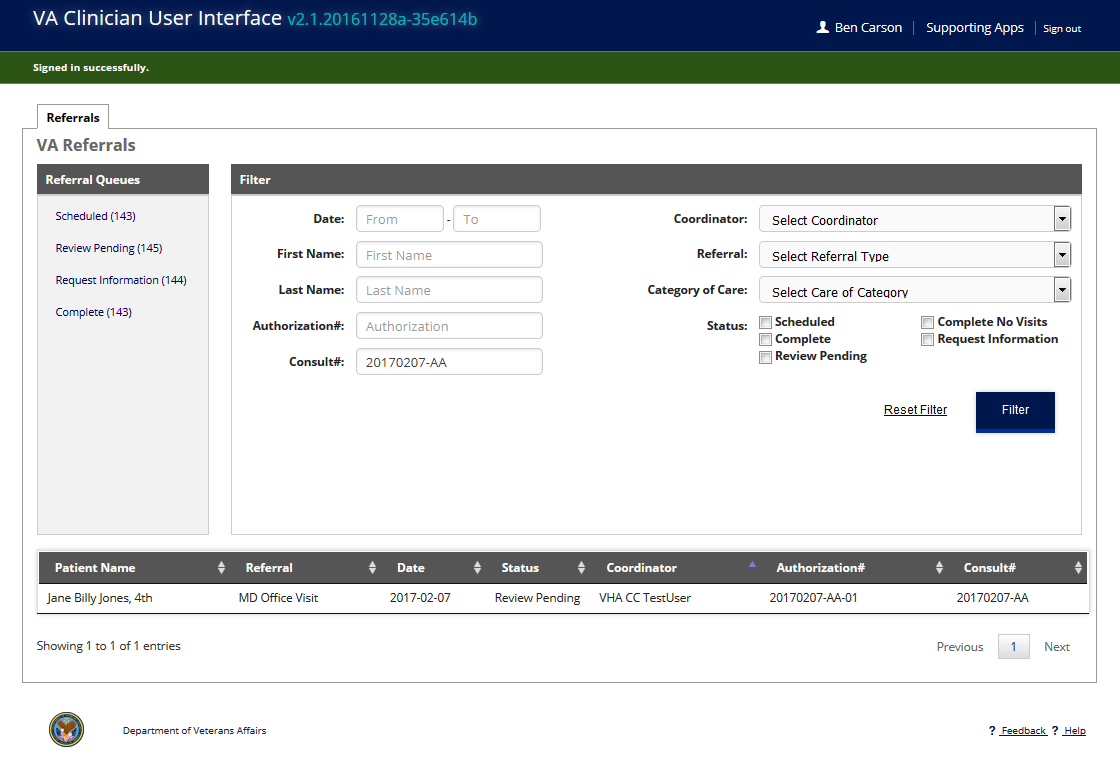
## CPP Dashboard

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**



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**

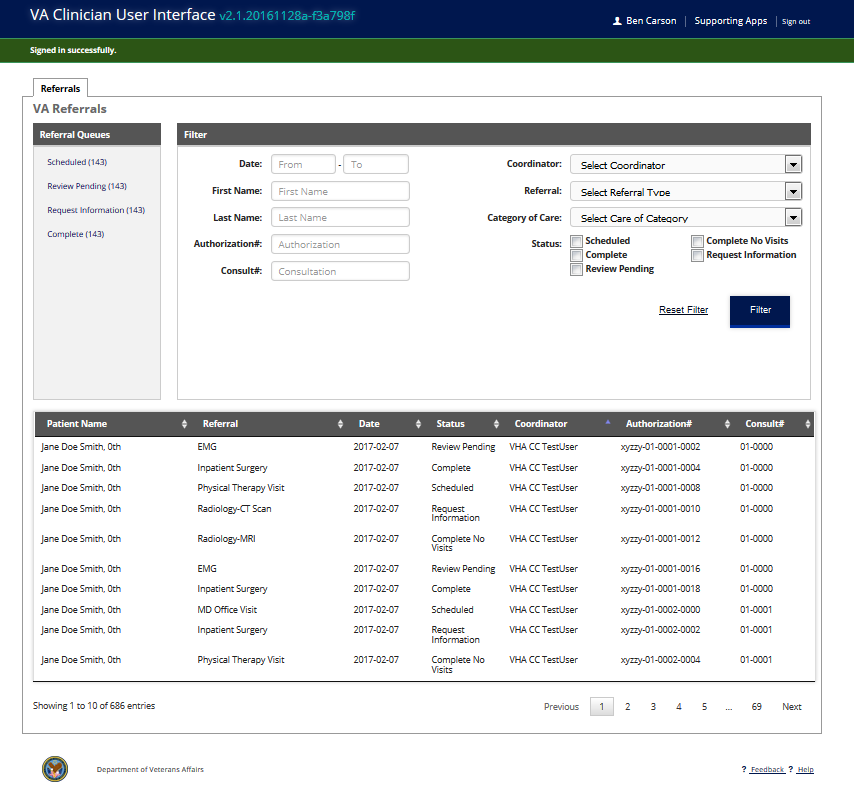
|  |  |
| --- | --- |
| **User Role** | **Supporting Apps** |
| Community Provider | Community Viewer ePrescribing?  Direct Virtru Pro  EHR system(s) |
| Scheduler | TBD |

# 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**



* 1. 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.

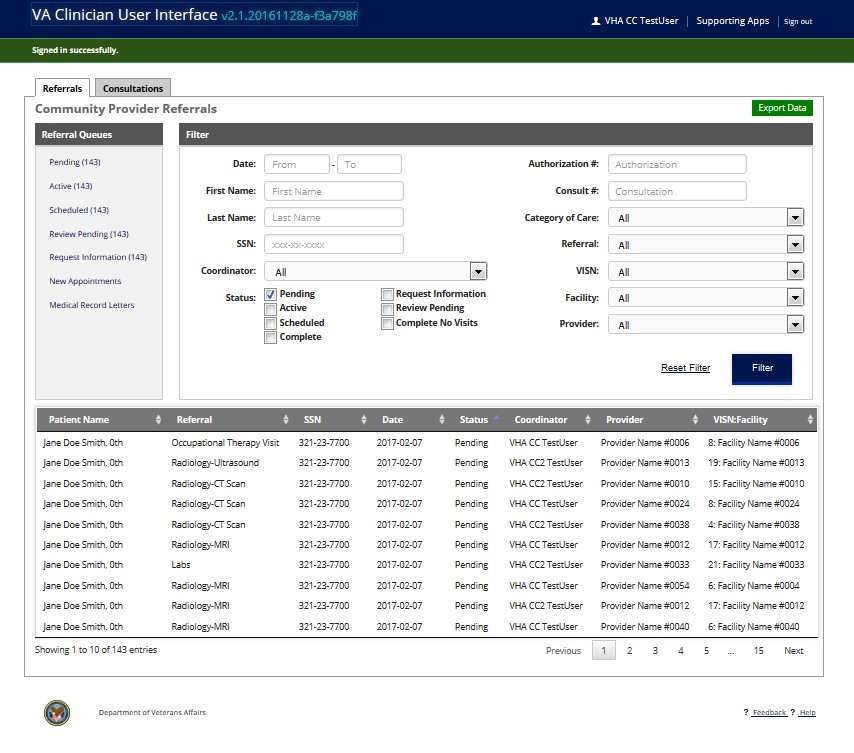
**Table 3. Referral Status Descriptions**

|  |  |
| --- | --- |
| **Status** | **Description** |
| Scheduled | Scheduled referrals have the 1st 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. |

# Search for and Referral

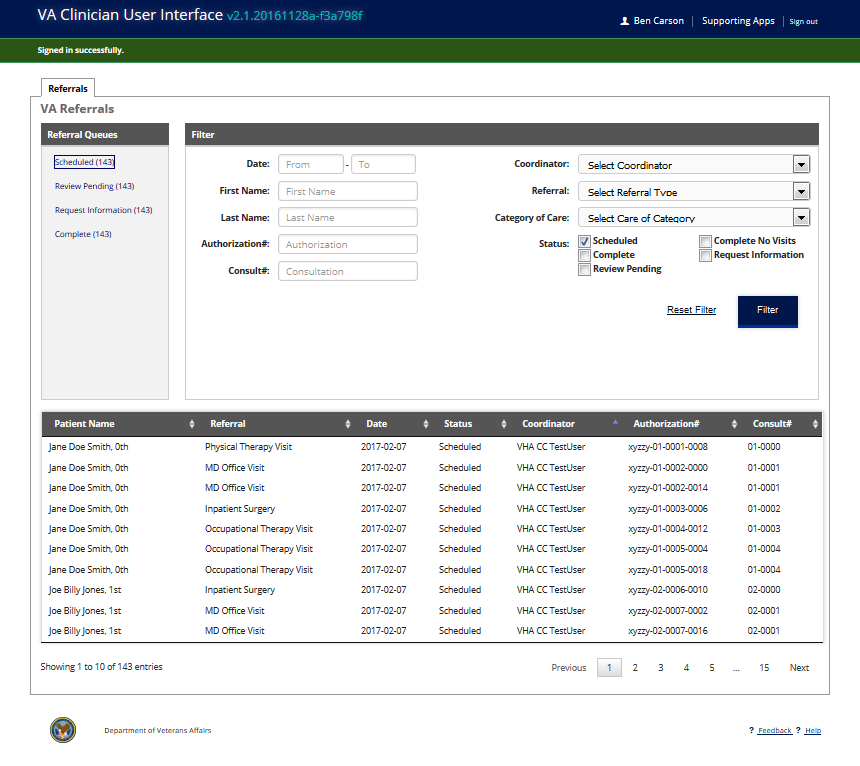
* 1. On the Referral Landing page, enter one or more criteria in the Filter area at the top of the page and click the **Filter** button. The table below will be populated with records that match the selected criteria.

**Figure 5. Filtering Referrals**



* 1. 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**



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

# View Referral, Add Appointments, Upload Medical

**Documents**

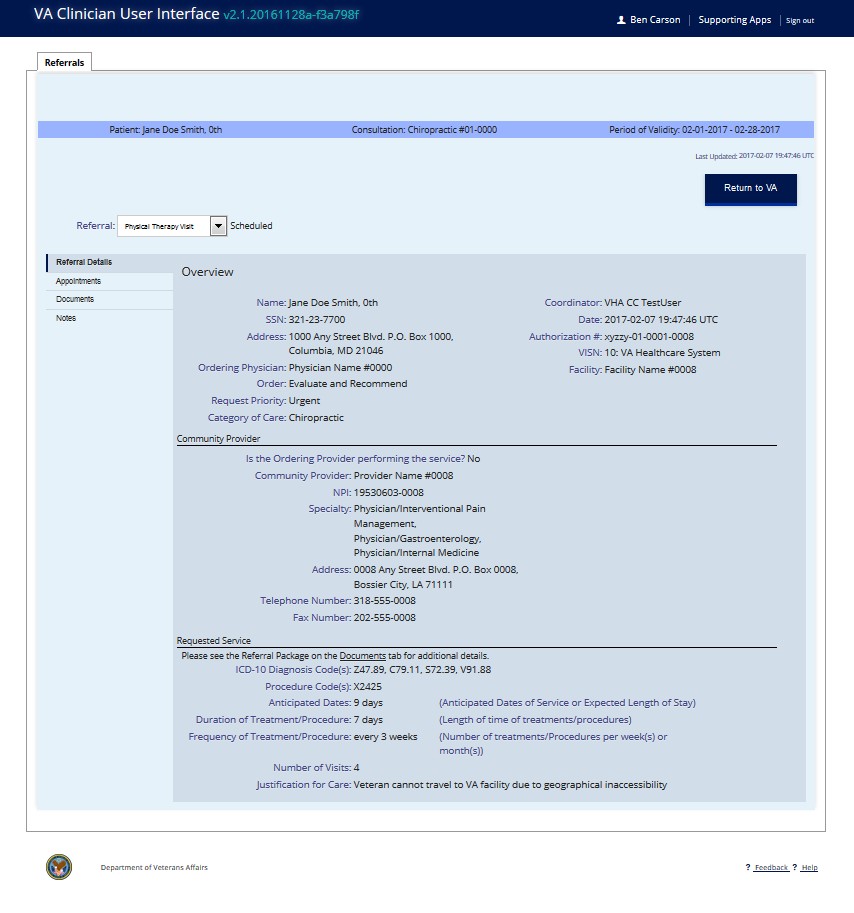
* 1. After locating a referral, by clicking on one of the queues, or searching for a specific record, click the desired record to open it.

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.

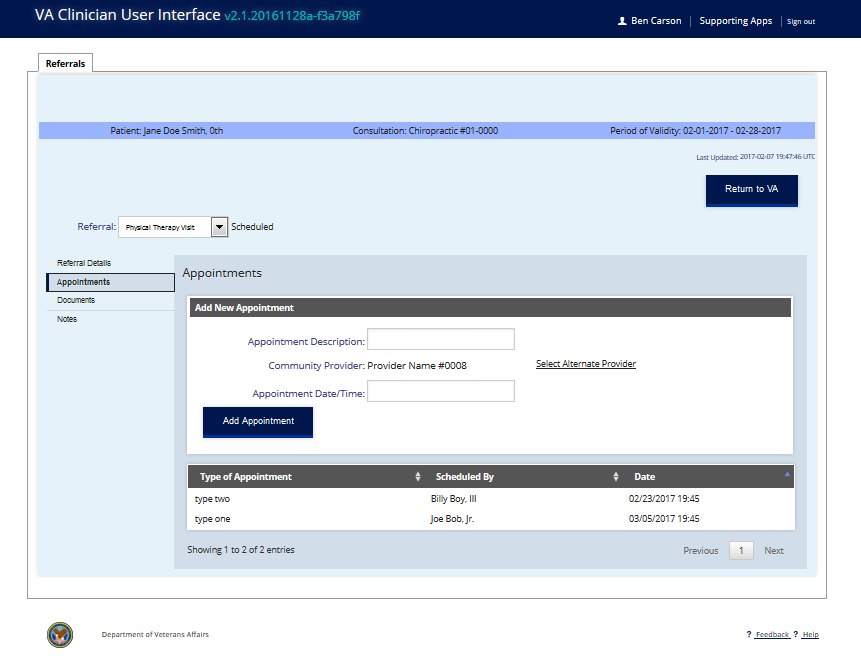
1. Access the Appointments tab to view, schedule, modify or delete appointments
2. Access the Documents tab to view and add Medical Records
3. Access the Notes tab to see actions that have taken place in relation to the referral.

**Figure 7. Viewing the Referral Details Tab**



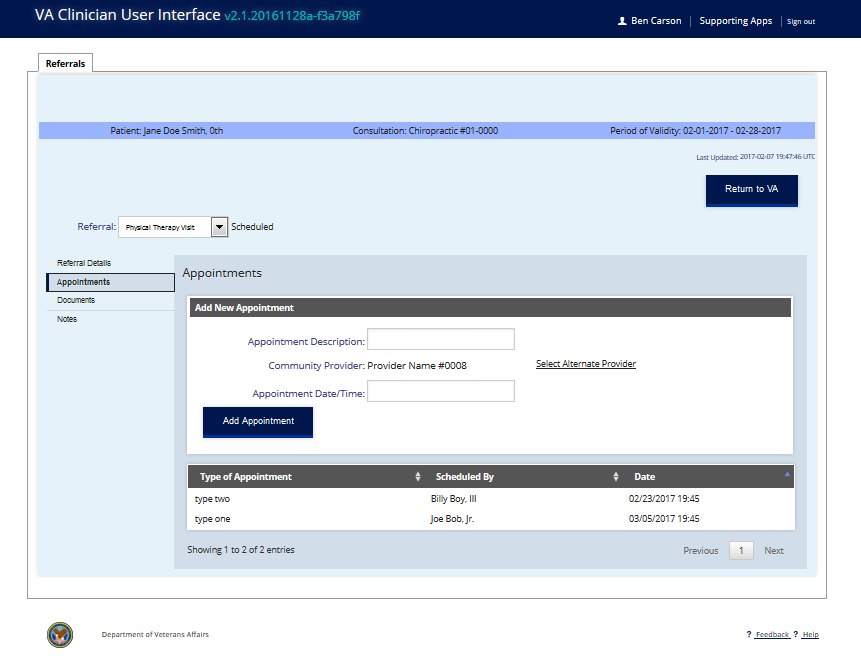
* 1. Select the Appointments tab

**Figure 8. Viewing the Appointment Tab**



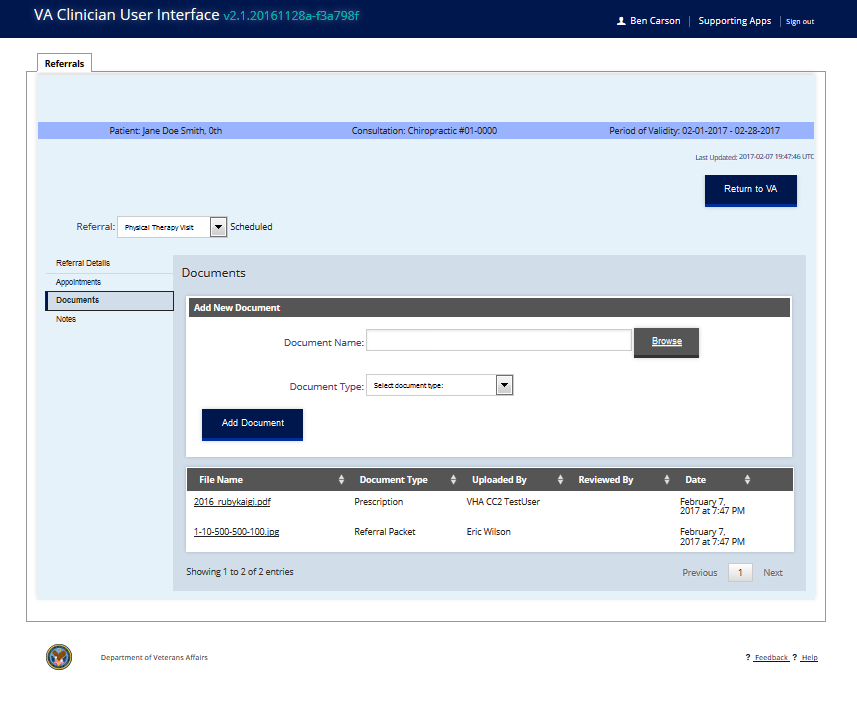
* 1. Enter the required data in the **Add New Appointment** box and click the **Add Appointment** button. The new appointment will be added to the Appointment table.

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



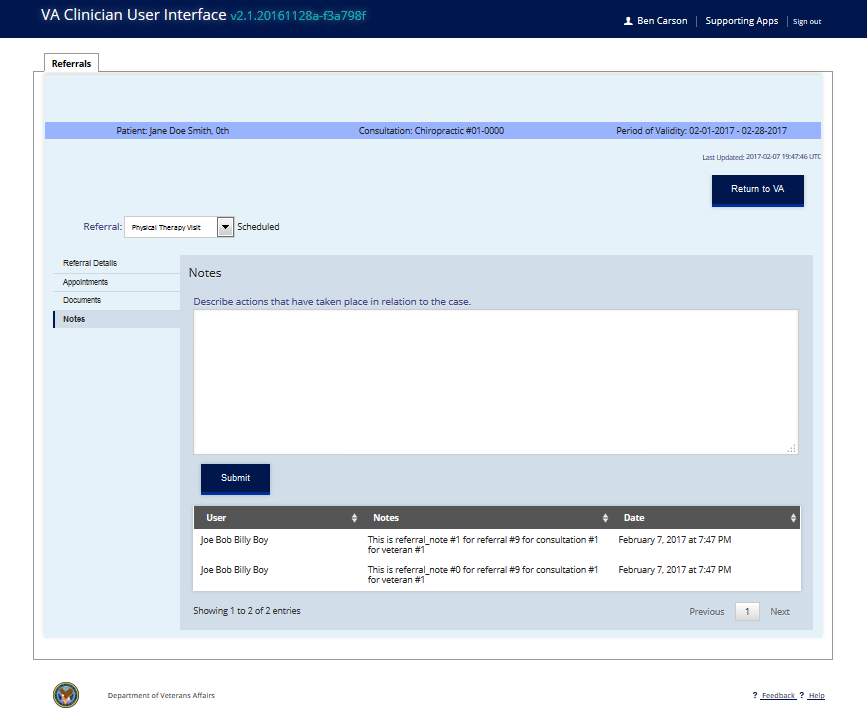
* 1. To Edit an appointment, select the record in the table. The record will pre-populate in the form. Make any necessary changes and click the **Update** button. [Does button label toggle from Add to Update yet?] The updates will appear in the Appointments table.
  2. Select the **Documents** tab to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

**Figure 10. Document Tab**



* 1. Review the Referral Packet and any other Medical Records that may exist.
  2. To upload medical records for the VA, select the **Browse** button. The Browse dialog box appears.
  3. Select the medical record file and click the **Open** button. The name of the document will pre-populate the **File Name** field.
  4. Click the **Add Document** button. The medical record will be added to the Documents table.
  5. 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?]
  6. Once all medical records have been uploaded, see section **6. Return Referral to VA**.
  7. Select the **Notes** tab to see activity related to the case.

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

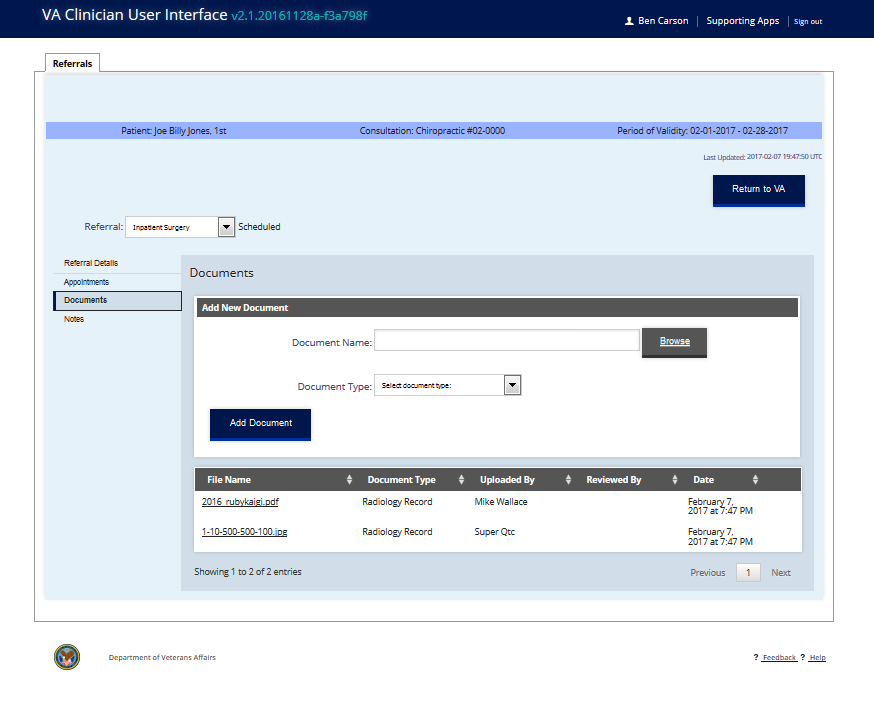


1. Review the actions that have taken place in relation to the case, such as status changes and requests for information. Notes: Communications between the Community Providers and the VA will remain in Direct messaging, so the notes field on this page will not be needed and will be removed in the next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

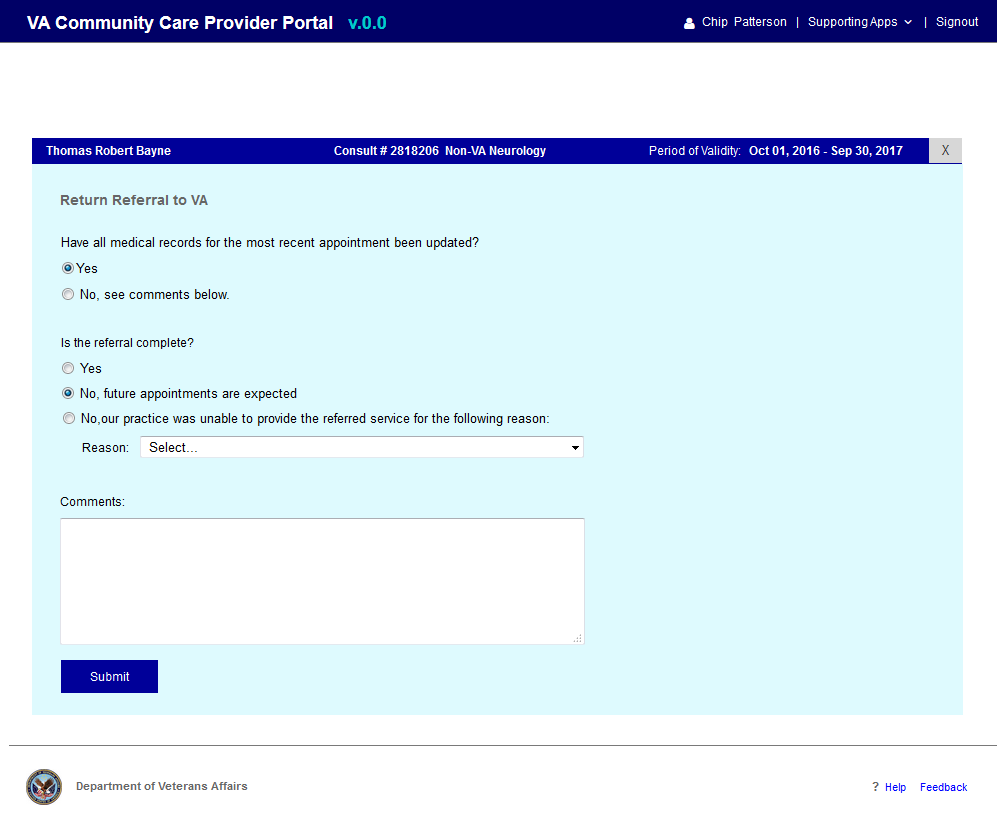
# Return Referral to VA

* 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**



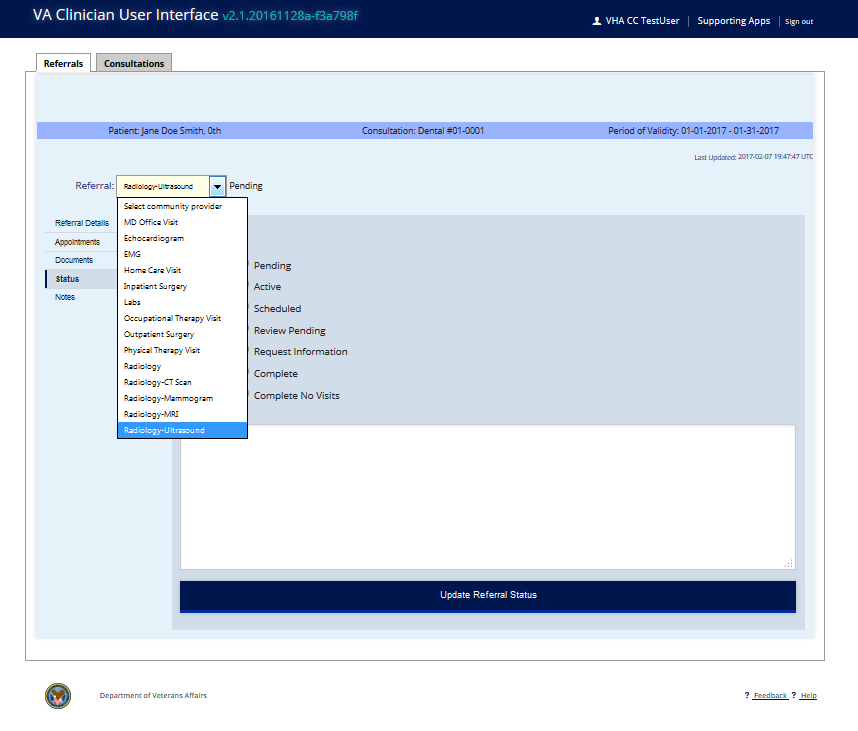
**Figure 13. Return Referral to VA**



# 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.

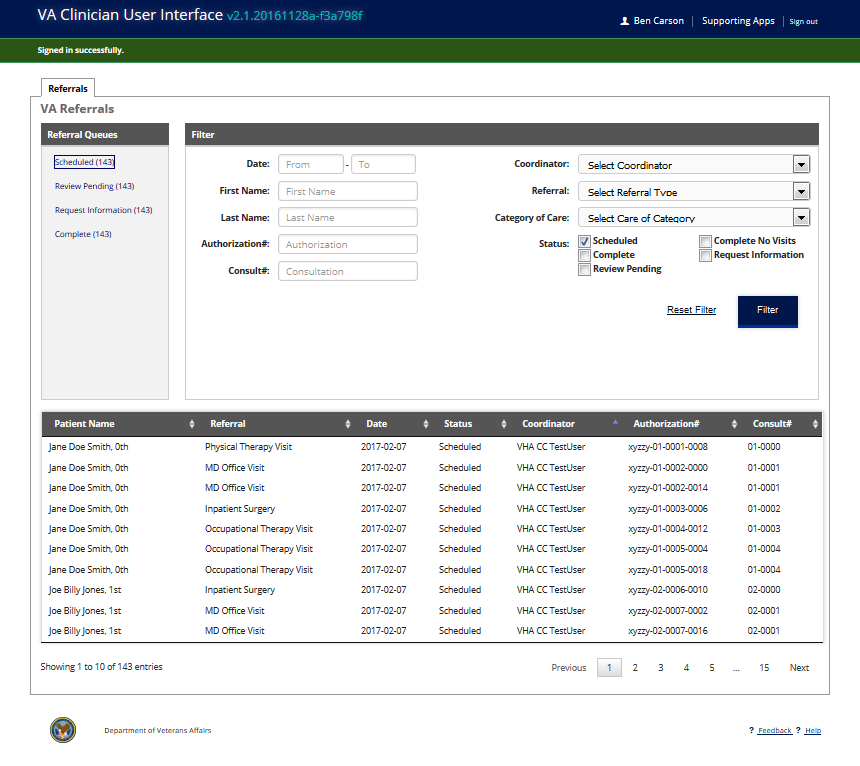
**Figure 14. Navigate to Another Referral**



# Provide Feedback on Site

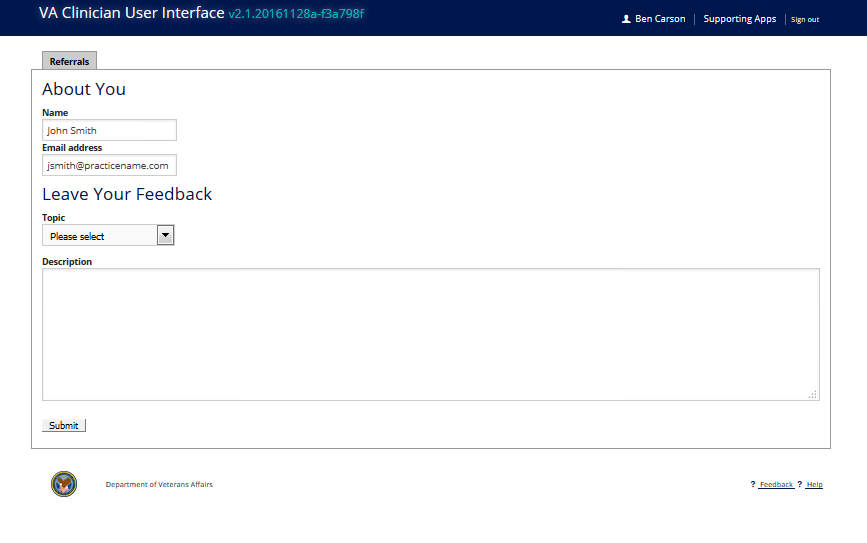
* 1. From any page in the application, you can click the Feedback link in the footer to provide feedback to the creators of the application.

**Figure 15. VHA Coordinator Dashboard**



* 1. 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**



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

**Figure 17. Thank You Message**



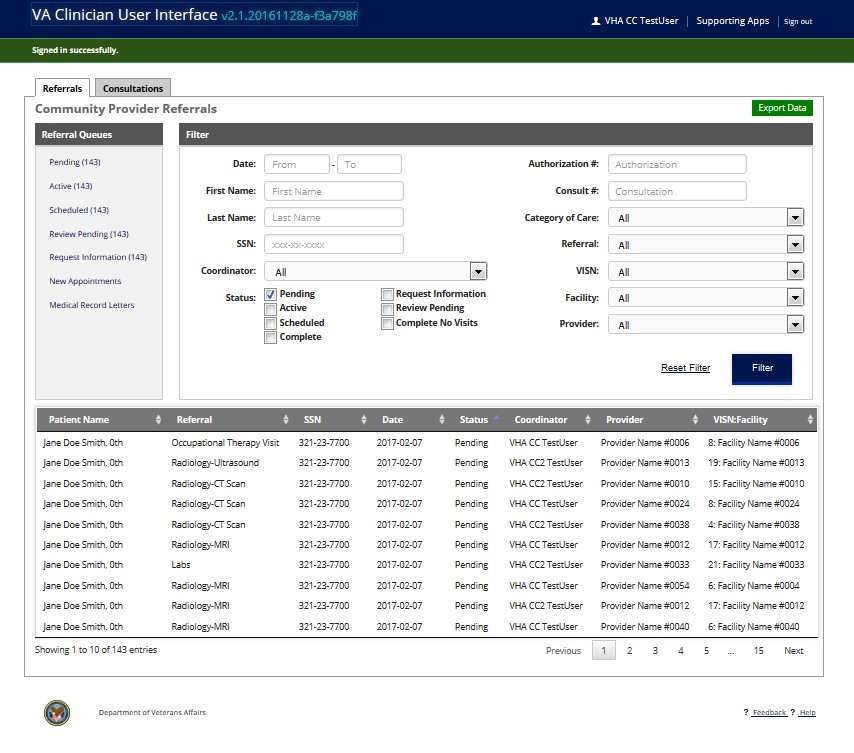
# 10. Add SAR (Future Functionality)

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**



# 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.