

**Veterans Choice Program
Community Care Portal**

VHA Community Care User Guide



December 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
2/9/2017	0.0	Initial draft	Team CCP
3/9/2017	1.0	Draft for Proof of Concept	Team CCP
8/10/2017	2.0	Revisions for August Release / Initial Operational Capability (IOC)	Team CCP
18/12/2017	3.0	Revision for December 2017 release	Team CCP

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 CCP 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.

Table of Contents

1. Introduction.....	1
1.1. Purpose	1
1.1.1. Disclaimers	1
1.1.2. Documentation Conventions	1
2. System Summary	2
2.1. System Configuration	2
2.2. Data Flows	3
2.3. User Roles	3
2.4. User Access Levels.....	3
2.5. Workflow	5
2.6. Expected Volume	5
3. Getting Started.....	6
3.1. Sign In	6
3.2. CCP Dashboard	8
4. Add Consultation and Referrals.....	12
5. Edit an Existing Consultation.....	16
6. Add a New Referral to an Existing Consultation	21
7. Delete Consultation.....	23
8. View Referral Queue	23
9. Add Referral.....	24
10. Edit an Existing Referral	24
11. Add Referral.....	33
12. Switch to a Different Referral	33
13. Add SAR	34
14. Delete Referral	35
15. Provide Feedback on Site	36
16. Sign Out	38

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 Care Portal (CCP).

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 Care Portal (CCP) is a web-based system that facilitates interactions between employees in the VHA's Community Care department and Community 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 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 Providers interacting with the VHA
- Increases the flow of content and relevant care information between Community 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 Providers and VHA
- Integrates with the VIA interface to VistA, In the future, CCP will also integrate with Data Access Service (DAS), Veterans Benefits Management System (VBMS), VistA Imaging, Fee Basis Claims System (FBCS), Community Provider Profile system (CCP), and Contract Payment and Reporting Module (CPRM).

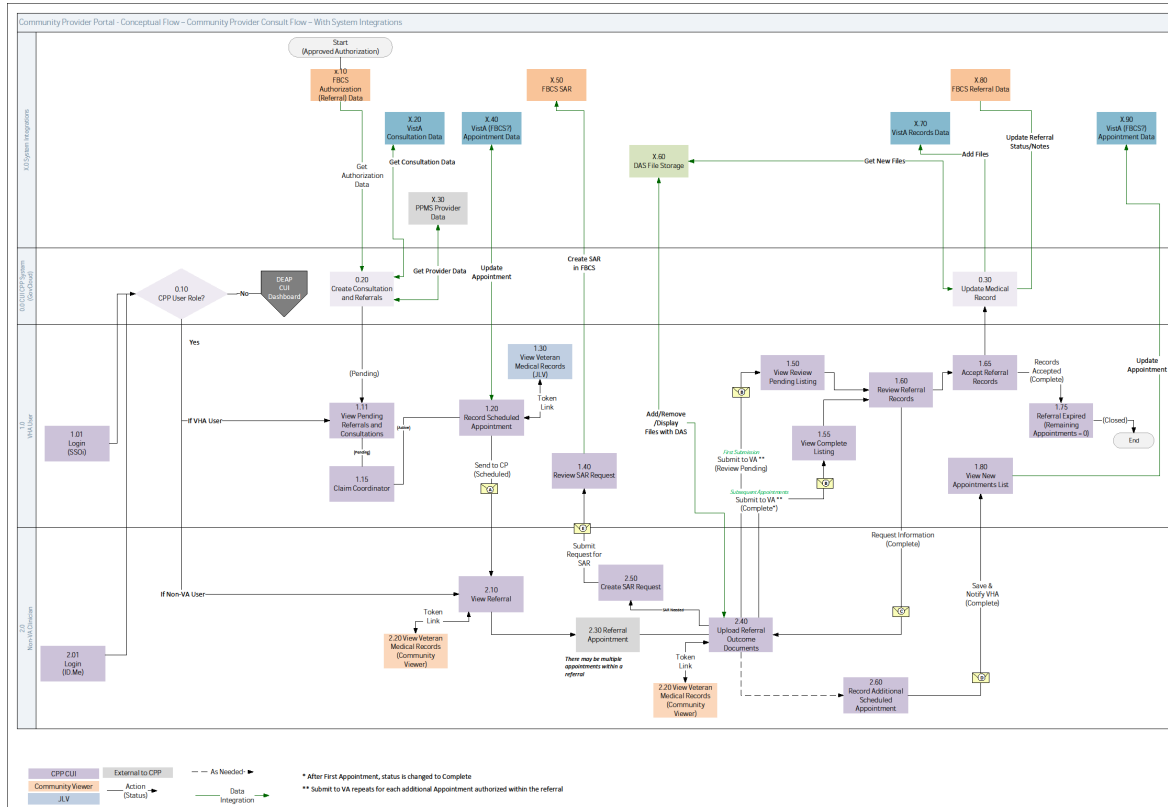
2.1. System Configuration

CCP users require a computer that provides access to the VA network, as well as, login credentials (email address and password). -

2.2. Data Flows

Figure 1 provides a high-level, simplified diagram showing how CCP integrates with other systems in the community care referral process.

Figure 1: Community Care Referral Program Data Flow Diagram



2.3. 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 CCP system. CCP 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).

2.4. User Access Levels

CUI provides 2 user roles associated with specific privileges, as well as, an Application Administrator user role with admin privileges. 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.

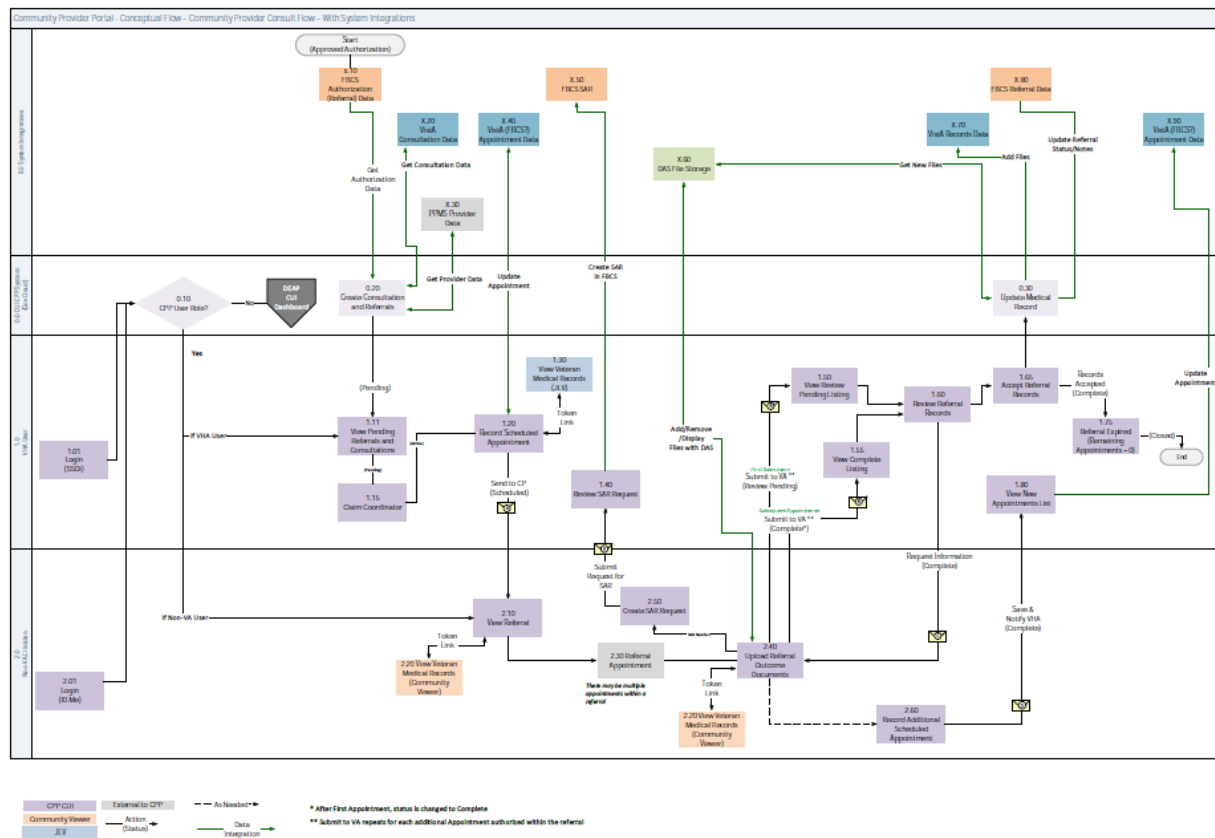
Table 1. User Roles and Privileges

User Role	Privileges
Application Administrator	Add VHA users Add CP users <i>Future functionality will include:</i> <i>Modify/Delete VHA Users</i> <i>Modify/Delete CP Users</i> <i>Update user roles (Privileges)</i> <i>Run Administrator Reports</i>
VHA Coordinator	View/Add/Update consultation records View/Add/Update referral records Update Referral status Add/update/cancel CCP appointments Review newly scheduled appointments Send referrals to Community Providers Add/view notes Upload/modify/open documents Review/download documents (Medical Records for export to JVL)
Community Provider	View referrals View/Add/modify appointments View/Add/modify/delete documents Enter notes Submit referrals the VHA

2.5. Workflow

Figure 2 provides a high-level, overview that illustrates how VHA Employees and Community Providers interact with Consultations and Referrals.

Figure 2: Community Care Provider Portal Workflow Diagram



2.6. Expected Volume

The following describes the estimated referral volume that the new system is expected to support.

Referrals

- Per Location: ~ 75-100 new Community Provider referrals arrive each day
- Nationwide: ~14,000 new Community Provider Referrals arrive per day.
- Yearly: 3.6 million new referrals each year for all locations
- ~50 referrals are returned with medical records each day per location.
- ~500,000 referrals are currently open and awaiting medical documents.

Consultations

- Note: The number of may drop as bundling rolls out and multiple referrals become part of a single Consultation
- Per Location: ~ 75-100 new Community Provider consultations are created each day
- Nationwide: ~14,000 new Community Provider Consultations are created per day.
- Yearly: 3.6 million new Consultations are created each year for all locations

3. Getting Started

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

3.1. Sign In

To sign in to CCP, complete the following steps:

1. For the Initial Operational Capacity (IOC) release, open your web browser to:
<https://www.test-cui.va.gov/referrals/cpp>
2. The system displays the following:

Figure 2. VHA Community Care Portal Sign-in Page

VA Community Provider Portal

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

[Sign in with PIV](#)

Sign In

Department of Veterans Affairs

[Privacy Policy](#)

[Return to top](#)
cui-cpp-development-121117-63b006a1

3. Enter your User Name
4. Enter your Password
5. Click the **Sign In** button. The system displays the VistA Authentication page.

Figure 4. VistA Authentication Page

The screenshot shows the VA Community Care Portal VistA Authentication page. At the top, a dark blue header contains the text "VA Community Care Portal" on the left and "VHA CC TestUser | Supporting Apps | Sign out" on the right. Below the header is a green banner with the text "Signed in successfully." The main content area is white and contains a light blue box titled "VistA Authentication". Inside this box are three input fields: "Access Code", "Verify Code", and "VistA site code". Below these fields is a blue "Submit" button. Above the input fields, there is a disclaimer: "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." At the bottom of the page, there is a footer with the Department of Veterans Affairs logo, the text "Department of Veterans Affairs", and links for "Privacy Policy", "Feedback", "Download User's Guide", and "FAQ".

6. Enter your VistA **Access Code**, **Verify Code** and **VistA Site Code**.
7. Click the **Submit** button. The system displays the CCP Dashboard.

3.2. CCP Dashboard

After signing in to CCP, the system displays a dashboard 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 applications to which you have access based on your role (see Table 2)
- A **Sign Out** link 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.
- The **Consultations** tab which provides access to Consultation filters that can be used to find specific referrals that need processing.
- **Feedback, Download User's Guide and FAQ** links in lower right

Figure shows a sample landing page—or dashboard—for a VHA Coordinator.

Figure 5. VHA Coordinator Dashboard

VA Community Provider Portal

VHA CC2 TestUser | Application Admin | Supporting Apps | Sign out

Signed in successfully.

Referrals

Consults

Community Provider Referrals

Export Data

Referral Queues

Urgent (427)

New (142)

Prep (143)

Assigned (143)

Review Pending (143)

Information Needed (143)

Expired (514)

New Appointments (971)

Medical Record Letters (1)

Filter

Date Range

To

Authorization Number

First Name

Consult Number

Last Name

Category of Care

All

SSN

xxxx

Date of Birth

mm/dd/yyyy

Referral Type

All

Coordinator

All

VISN

All

Status

☐ New (142)

☐ Review Pending (143)

☐ Prep (143)

☐ Information Needed (143)

☐ Assigned (143)

☐ Complete (114)

☐ Accepted (143)

Provider

All

Reset Filter

Filter

Patient Name	Referral	SSN	Date	Status	Coordinator	Provider	VISN:Facility
Joe Doe Smith, 9th	Radiology-MRI	7709	12/18/17	Complete	VHA CC2 TestUser	WILLIAMS GLORIA	15: GLORIA WILLIAMS
Joe Doe Smith, 9th	Inpatient Surgery	7709	12/18/17	Information Needed	VHA CC TestUser	YEPMO ANNE	10: ANNE YEPMO
Joe Doe Smith, 9th	Radiology-CT Scan	7709	12/18/17	Review Pending	VHA CC2 TestUser	DASH MEMUNA	20: MEMUNA DASH
Joe Doe Smith, 9th	EMG	7709	12/18/17	Accepted	VHA CC TestUser	CHAPMAN DAWN	10: MISS DAWN DANITA CHAPMAN
Joe Doe Smith, 9th	Physical Therapy Visit	7709	12/18/17	Assigned	VHA CC2 TestUser	RIX LISA	6: MS. LISA MICHELE RIX, LPC, CAC-II
Joe Doe Smith, 9th	MD Office Visit	7709	12/18/17	Prep	VHA CC TestUser	BAYSAH MYWEN	17: MYWEN BAYSAH, LICSW
Joe Doe Smith, 9th	Occupational Therapy Visit	7709	12/18/17	New	VHA CC2 TestUser	ANIMASHAUN AGNES	5: MS. AGNES ANIMASHAUN, PA
Joe Doe Smith, 9th	Radiology-MRI	7709	12/18/17	Complete	VHA CC TestUser	STEPHENS ALTHEA	1: ALTHEA STEPHENS
Joe Doe Smith, 9th	Inpatient Surgery	7709	12/18/17	Information Needed	VHA CC2 TestUser	ASHU MARY	4: MARY ASHU
Joe Doe Smith, 9th	Radiology-CT Scan	7709	12/18/17	Review Pending	VHA CC TestUser	TURAYSON FATMATA	22: FATMATA TURAYSON

Showing 1 to 10 of 971 entries

Previous

1

2

3

4

5

...

98

Next

The Supporting App menu is customized with the options appropriate for each role. The Supporting Apps menu options are shown in Table 2. Supporting Apps by User Role.

Table 2. Supporting Apps by User Role

User Role	Supporting Apps
VHA Coordinator	<p>NPPES NPI Registry Joint Legacy Viewer (JLV)</p> <p><i>In the future, links may include:</i></p> <p>PPMS (2018) RefDoc JLV (PAM) CPRS Direct Imaging RAS (FSC) RAS (COTS) FBCS PIT CCRS ES CRM ARS</p>

4. Add Consultation and Referrals

1. Click the **Add Consultation** button on the Consultation Landing page.

Figure 6. Consultation Landing Page

The screenshot displays the 'Community Provider Consults' interface. At the top, there are two tabs: 'Referrals' and 'Consults'. Below the tabs, the title 'Community Provider Consults' is shown. To the right of the title, there are two buttons: 'Add Consult' (highlighted with a red circle) and 'Export Data'. Below the title bar is a 'Filter' section containing several input fields and dropdown menus: 'Date range' with 'To' and 'From' fields, 'First name', 'Last name', 'SSN' (with a placeholder 'XXXX'), 'Date of Birth' (with a placeholder 'mm/dd/yyyy'), 'Category of care' (dropdown menu), 'VISN' (dropdown menu), 'Ordering physician', 'Consult number', and 'Coordinator' (dropdown menu). At the bottom of the filter section, there is a 'Status' section with three radio buttons: 'New', 'Open', and 'Complete'. At the bottom right of the filter section, there are two buttons: 'Reset Filter' and 'Filter'.

2. Enter the social security number of the Veteran to pull in a list of consultations for that Veteran that exist in VistA. All consultations associated with that social security number in VistA will appear in the list.

Figure 7. Enter SSN of Veteran

The screenshot shows a web form titled "Add New Consultation". Below the title is a text prompt: "Enter the Social Security Number of the Veteran for whom you'd like to create a Consult." Below this prompt is a text input field labeled "SSN:" followed by a blue "Search" button. A red rectangular box highlights the "SSN:" label, the input field, and the "Search" button.

3. Select the VistA consultation that you would like to add to the Community Care Portal. The CCP Consultation record for that consultation will appear. Available details for the selected veteran will appear. There will be a few blank fields that need to be populated in order to add the Consultation to the CCP.

Figure 8. Select the Consultation to be added to CCP

The screenshot shows the "Add New Consultation" form with the SSN input field containing "321237700" and the "Search" button. Below the input field, a message states: "Multiple records match the SSN entered. Select the correct record." Below this message is a table with the following columns: Last Name, First Name, Middle Name, DOB, City, State, Zip Code, Consult ID, and Date. The table contains three rows of data. The third row is highlighted with a red box. At the bottom of the table, it says "Showing 1 to 3 of 5 entries". On the right side, there are navigation links: "Previous", "1", "2", and "Next".

Last Name	First Name	Middle Name	DOB	City, State	Zip Code	Consult ID	Date
Smith Osh	Jane	Doe	03/01/1953	Columbia	21046	01-0000	2006-09-14T14:07:16.000+00:00
Smith Osh	Jane	Doe	03/01/1953	Columbia	21046	01-0001	2006-09-14T14:07:16.000+00:00
Smith Osh	Jane	Doe	03/01/1953	Columbia	21046	01-0002	2006-09-14T14:07:16.000+00:00

Figure 9. Consultation Detail Page

The screenshot shows the 'VA Community Provider Portal' header with user links: 'VHA CC2 TestUser', 'Application Admin', 'Supporting Apps', and 'Sign out'. Below the header, there are tabs for 'Referrals' and 'Consults'. The main content area is titled 'Joe Doe Smith, 9th' with a link '< Back To Search Results'. Under 'Veteran Information', there is an 'Open JLV' button and fields for 'Veteran Name' (Joe Doe Smith, 9th), 'Date of Birth' (03/10/1953), and 'SSN' (7709). Below this, there are fields for 'Consult #' (10-0002), 'CAN Score', and 'Entered Into VistA'. The 'Episode of Care' section includes a 'Category of Care' dropdown (Gec Non Skilled Home Health-Aide), 'Duration of the Episode of Care' (10/01/17 to 10/31/17), and 'Request Priority' (Routine and Urgent, with Urgent selected). A blue 'Submit' button is circled in red at the bottom left of the form.

4. Enter the required fields and click the “Submit” button. The Consultation is saved and the page refreshes with a referral section at the bottom of the page.

Figure 10. Consultation Detail Page

Referrals Consults

Joe Doe Smith, 9th

[< Back To Search Results](#)

Veteran Information

Open JLV

Veteran Name Joe Doe Smith, 9th	Date of Birth 03/10/1953	SSN 7709
Consult # 10-0002	CAN Score	Entered Into VistA

Episode of Care

Category of Care	Duration of the Episode of Care	Request Priority
Gec Non Skilled Home Health-Aide	10/01/17 To 10/31/17	<input type="radio"/> Routine <input checked="" type="radio"/> Urgent

Submit

Comments

Comment	Added By	Date
---------	----------	------

No data available in table

Showing 0 to 0 of 0 entries

Previous

Next

Comment

Add Comment

Referrals

Referral	Authorization#	Community Provider	NPI	Date	Status
EMG	xyzy-10-0048-0019	AFOLABI IDAYAT	1326307273	12/18/17	Review Pending
Radiology-CT Scan	xyzy-10-0048-0018	MOBLEY JENNELL	1669731584	12/18/17	Accepted
Inpatient Surgery	xyzy-10-0048-0017	UNITY HEALTH CARE, INC	1396864369	12/18/17	Assigned
Radiology-MRI	xyzy-10-0048-0016	KOPRIVNIKAR JAMIE	1295994614	12/18/17	Prep
Occupational Therapy Visit	xyzy-10-0048-0015	LORRAINE COURTNEY	1427427509	12/18/17	New

Showing 1 to 5 of 20 entries

Previous

1

2

3

4

Next

Referral Type

Select Referral Type

Authorization Number

Add Referral

VistA Consult Summary

[Return to top](#)

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Once the record has been saved, the Referral section of the page appears. If you need to add a referral, continue to step 5, if not, continue to Step 6.

Figure 11. Referral Table on the Consultation Detail Page

Referrals

Referral	Authorization#	Community Provider	NPI	Date	Status
EMG	xyzy-10-0048-0019	AFOLABI IDAYAT	1326307273	12/18/17	Review Pending
Radiology-CT Scan	xyzy-10-0048-0018	MOBLEY JENNELL	1669731584	12/18/17	Accepted
Inpatient Surgery	xyzy-10-0048-0017	UNITY HEALTH CARE, INC	1396864369	12/18/17	Assigned
Radiology-MRI	xyzy-10-0048-0016	KOPRIVNIKAR JAMIE	1295994614	12/18/17	Prep
Occupational Therapy Visit	xyzy-10-0048-0015	LORRAINE COURTNEY	1427427509	12/18/17	New

Showing 1 to 5 of 20 entries

Previous 1 2 3 4 Next

Referral Type

Select Referral Type

Authorization Number

Add Referral

- To create and link a Referral to this Consultation, enter a Referral Type, Authorization # and Community Provider and click the **Add Referral** button. Repeat this step for each Referral that is associated with this consultation.
- Click the **Submit** button. The Consultation record is saved, any new referrals records are created and the Consultation Landing page is re-displayed. If the new Consultation matches the selected filters, the record will appear. If not, change the filter criteria, click the **Filter** button, and the record will appear in the listing.
- See section **5. Edit an Existing Referral** for instructions on how to enter the remaining data related to the newly created Referrals.

5. Edit an Existing Consultation

- Click the **Consultations** tab. The Consultations landing page will appear. All records that match the following criteria will display:

- a. Referral Status = New, Prep, Assigned, Review Pending, Information Needed, and Accepted will be displayed. (Records with a Referral Status of “Complete” will not be displayed by default; however they can be accessed by using the Status filter)
- b. Coordinator = All
- c. Duration of the Episode of Care End Date >= Today’s Date

Figure 12. VHA Consultation Landing Page

Notice: You are operating in a test environment

VA Community Provider Portal | VHA CC2 TestUser | Application Admin | Supporting Apps | Sign out

Referrals **Consults**

Joe Doe Smith, 9th
[Back To Search Results](#)

Veteran Information Open JLV

Veteran Name Joe Doe Smith, 9th	Date of Birth 03/10/1953	SSN 7709
Consult # 10-0002	CAN Score	Entered Into Vista

Episode of Care

Category of Care: Gec Non Skilled Home Health-Aide **Duration of the Episode of Care**: 10/01/17 To 10/31/17 **Request Priority**: ☐ Routine ☒ Urgent

Submit

Comments

Comment	Added By	Date
No data available in table		

2. From the Consultation Landing page, enter one or more criteria in the Filter area at the top of the Consultations Landing page and click the Filter button. The table below will be populated with records that match the selected criteria.

Figure 13. Select a Consultation Record

Referrals **Consults**

Community Provider Consults

Add Consult **Export Data**

Filter

Date range
[] To []

Category of care
All

First name
[]

VISN
All

Last name
[]

Ordering physician
[]

SSN
xxxx

Date of Birth
mm/dd/yyyy

Consult number
[]

Coordinator
All

Status
☐ New ☐ Open ☐ Complete

Reset Filter **Filter**

Name	SSN	Episode of Care	Status	Ordering Physician	Date
Joe Doe Smith, 9th	7709	Medicine	Open	COBB PAMELA	12/18/17
Joe Doe Smith, 9th	7709	Hcps Peritoneal Dialysis	New	SHAMEEM RUMANA	12/18/17
Joe Doe Smith, 9th	7709	Gec Non Skilled Home Health-Aide	Complete	DCA CAPITOL HILL SNF LLC	12/18/17

3. Moving your cursor over the results allows you to highlight individual rows.
Note: Filters can be cleared by clicking the **Reset Filter** link.
4. Click to select the desired record. The Consultation Detail page will appear.

Figure 14. Consultation Detail Page

VA Community Provider Portal
VHA CC2 TestUser | Application Admin | Supporting Apps | Sign out

Referrals
Consults

Joe Doe Smith, 9th

[< Back To Search Results](#)

Veteran Information

Veteran Name
Joe Doe Smith, 9th

Date of Birth
03/10/1953

SSN
7709

Consult #
10-0003

CAN Score

Entered Into Vista

Open JLV

Episode of Care

Category of Care
Hops Peritoneal Dialysis

Duration of the Episode of Care
12/01/17 To 12/31/17

Request Priority
☒ Routine
☐ Urgent

Submit

Comments

Comment	Added By	Date
No data available in table		

Showing 0 to 0 of 0 entries
Previous
Next

Comment

Add Comment

Referrals

Referral	Authorization#	Community Provider	NPI	Date	Status
Outpatient Surgery	xyzy-10-0049-0019	HOWARD CHERYL	1295862415	12/18/17	Information Needed
MD Office Visit	xyzy-10-0049-0018	HOWARD CHERYL	1659696045	12/18/17	Review Pending
Outpatient Surgery	xyzy-10-0049-0017	HOWARD CHERYL	1710342811	12/18/17	Accepted
MD Office Visit	xyzy-10-0049-0016	HOWARD CHERYL	1083089809	12/18/17	Assigned
Outpatient Surgery	xyzy-10-0049-0015	HOWARD CHERYL	1659696045	12/18/17	Prep

Showing 1 to 5 of 20 entries
Previous
1
2
3
4
Next

Referral Type
Select Referral Type

Authorization Number

Add Referral

VistA Consult Summary

Department of Veterans Affairs

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[Return to top](#)
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5. Modify the necessary data (episode of care, add comments) and click the Submit button

Figure 15. Click the Submit button.

VA Community Provider Portal

VHA CC2 TestUser | Application Admin | Supporting Apps | Sign out

Referrals

Consults

Joe Doe Smith, 9th

< Back To Search Results

Veteran Information

Open JLV

Veteran Name

Date of Birth

SSN

Joe Doe Smith, 9th

03/10/1953

7709

Consult #

CAN Score

Entered Into VistA

10-0003

Episode of Care

Category of Care

Duration of the Episode of Care

Request Priority

Hcps Peritoneal Dialysis

12/01/17 To 12/31/17

☒ Routine ☐ Urgent

Submit

Comments

Comment

Added By

Date

No data available in table

Showing 0 to 0 of 0 entries

Previous

Next

Comment

Add Comment

Referrals

Referral

Authorization#

Community Provider

NPI

Date

Status

Outpatient Surgery

xyzy-10-0049-0019

HOWARD CHERYL

1295862415

12/18/17

Information Needed

MD Office Visit

xyzy-10-0049-0018

HOWARD CHERYL

1659696045

12/18/17

Review Pending

Outpatient Surgery

xyzy-10-0049-0017

HOWARD CHERYL

1710342811

12/18/17

Accepted

MD Office Visit

xyzy-10-0049-0016

HOWARD CHERYL

1083089809

12/18/17

Assigned

Outpatient Surgery

xyzy-10-0049-0015

HOWARD CHERYL

1659696045

12/18/17

Prep

Showing 1 to 5 of 20 entries

Previous

1

2

3

4

Next

Referral Type

Select Referral Type

Authorization Number

Add Referral

VistA Consult Summary



For details on how to add a new referral, see section **6.Add a New Referral to an Existing Consultation**, followed by section **10.Edit Existing Referral**.

Note: Consultations cannot be deleted. In the future, it will be possible to update the status of a Consultation to “Closed”.

6. Add a New Referral to an Existing Consultation

1. Follow the steps to **Edit an Existing Consultation** (see Section 10).
2. Scroll down to the **Add New Referral** box, enter a Referral Type, Authorization # and Provider and click the **Add Referral** button. The new Referral appears in the Referral table. Repeat this step for each new Referral to be associated with this consultation. (See section **10. Edit Existing Referral** for details on how to continue completing the referral record.

3. Figure 13. Add New Referral

Referrals
Consults

Joe Doe Smith, 9th

[< Back To Search Results](#)

Open JLV

Veteran Name	Date of Birth	SSN
Joe Doe Smith, 9th	03/10/1953	7709
Consult #	CAN Score	Entered Into Vista
10-0003		

Episode of Care

Category of Care	Duration of the Episode of Care	Request Priority
Hcps Peritoneal Dialysis	12/01/17 To 12/31/17	<input checked="" type="radio"/> Routine <input type="radio"/> Urgent

Submit

Comments

Comment	Added By	Date
---------	----------	------

No data available in table

Showing 0 to 0 of 0 entries

Comment

Add Comment

Referrals

Referral	Authorization#	Community Provider	NPI	Date	Status
Outpatient Surgery	xyzy-10-0049-0019	HOWARD CHERYL	1295862415	12/18/17	Information Needed
MD Office Visit	xyzy-10-0049-0018	HOWARD CHERYL	1659696045	12/18/17	Review Pending
Outpatient Surgery	xyzy-10-0049-0017	HOWARD CHERYL	1710342811	12/18/17	Accepted
MD Office Visit	xyzy-10-0049-0016	HOWARD CHERYL	1083089809	12/18/17	Assigned
Outpatient Surgery	xyzy-10-0049-0015	HOWARD CHERYL	1659696045	12/18/17	Prep

Showing 1 to 5 of 20 entries

Referral Type

Select Referral Type

Authorization Number

Add Referral

- Click the **Submit** button. The Consultation is saved and the new referral(s) are created with a status of “New”.
- See section **10. Edit Existing Referral** for instructions on how to enter the remaining Referral information.

7. Delete Consultation

Future Functionality: Consultations cannot be deleted; however, the status of a Consultation can be set to “Closed”. Unnecessary consultations can be closed manually with a status change on the detail page. See section 5. **Edit an Existing Consultations** for instructions on how to edit consultation status.

8. View Referral Queue

Figure 7 shows the VHA Coordinator Dashboard.

Figure 17. VHA Coordinator Dashboard with Referral Queues

The screenshot displays the VHA Coordinator Dashboard with the 'Referrals' tab selected. The 'Community Provider Referrals' section is active, and the 'Referral Queues' sidebar is highlighted with a red box. The sidebar lists the following queues:

- Urgent (427)
- New (142)
- Prep (143)
- Assigned (143)
- Review Pending (143)
- Information Needed (143)
- Expired (514)
- New Appointments (971)
- Medical Record Letters (1)

The main content area features a 'Filter' section with the following fields and options:

- Date Range:** Two input fields for 'From' and 'To'.
- First Name:** Input field.
- Last Name:** Input field.
- SSN:** Input field with a placeholder 'XXXX'.
- Date of Birth:** Input field with a placeholder 'mm/dd/yyyy'.
- Authorization Number:** Input field.
- Consult Number:** Input field.
- Category of Care:** Dropdown menu with 'All' selected.
- Referral Type:** Dropdown menu with 'All' selected.
- VISN:** Dropdown menu with 'All' selected.
- Provider:** Dropdown menu with 'All' selected.
- Coordinator:** Dropdown menu with 'All' selected.
- Status:** Checkboxes for 'New (142)', 'Prep (143)', 'Assigned (143)', 'Accepted (143)', 'Review Pending (143)', 'Information Needed (143)', and 'Complete (114)'.

At the bottom right, there are buttons for 'Reset Filter' and 'Filter'.

1. Click one of the **Queue** links on the Referral Landing page (i.e., New, Prep, etc.). The results set will be populated with all records that match the criteria for the selected queue.
2. The Queues display records based on the following criteria:
 - STAT: Request Priority = Urgent and Referral status \neq Closed No Visits.
 - New: Referral Status = New
 - Prep: Referral Status = Prep

- Assigned: Referral Status = Assigned
 - Review Pending: Referral Status = Review Pending
 - Information Needed: Referral Status = Information Needed
 - New Appointments: Appointment created by CP and appointment reviewed=No
 - Medical Record Letters: ML_Reminder_3 = Sent. When Referral Status is updated to Review Pending, all three ML_Reminders are reset to their default value (No/Null).
 - Expired: Duration of the Episode of Care has passed and the status does not equal “Complete”
3. The number in parentheses following the name of each queue indicates how many records will appear in that queue.

9. Add Referral

See the **Add Consultation and Referral** and the **Add New Referral to an Existing Consultation** sections.

10. Edit an Existing 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 18. Filter Referrals

Referrals **Consults**

Community Provider Referrals [Export Data](#)

Referral Queues

- [Urgent \(427\)](#)
- [New \(142\)](#)
- [Prep \(143\)](#)
- [Assigned \(143\)](#)
- [Review Pending \(143\)](#)
- [Information Needed \(143\)](#)
- [Expired \(514\)](#)
- [New Appointments \(971\)](#)
- [Medical Record Letters \(1\)](#)

Filter

Date Range
[] To []

First Name
[]

Last Name
[]

SSN
[]

Date of Birth
[]

Authorization Number
[]

Consult Number
[]

Category of Care
All ▼

Referral Type
All ▼

VISN
All ▼

Provider
All ▼

Coordinator
All ▼

Status

- ☐ New (142)
- ☐ Review Pending (143)
- ☐ Prep (143)
- ☐ Information Needed (143)
- ☐ Assigned (143)
- ☐ Complete (114)
- ☐ Accepted (143)

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

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

Figure 19. Select Referral

Referrals

Consults

Joe Doe Smith, 9th

< Back To Search Results

Veteran Information

Open JLV

Veteran Name

Date of Birth

SSN

Joe Doe Smith, 9th

03/10/1953

7709

Consult #

CAN Score

Entered Into VistA

10-0003

Episode of Care

Category of Care

Duration of the Episode of Care

Request Priority

Hcps Peritoneal Dialysis

12/01/17 To 12/31/17

☒ Routine
☐ Urgent

Submit

Comments

Comment	Added By	Date
No data available in table		

Showing 0 to 0 of 0 entries

Previous Next

Comment

Add Comment

Referrals

Referral	Authorization#	Community Provider	NPI	Date	Status
Outpatient Surgery	xyzy-10-0049-0019	HOWARD CHERYL	1295862415	12/18/17	Information Needed
MD Office Visit	xyzy-10-0049-0018	HOWARD CHERYL	1659696045	12/18/17	Review Pending
Outpatient Surgery	xyzy-10-0049-0017	HOWARD CHERYL	1710342811	12/18/17	Accepted

3. Click to open the desired record. The Referral Detail page will appear. The page displays tabs for the various parts of the Referral.
4. On the Referral Details tab
 - a. Modify the necessary data and click the **Save** button. The record will be saved.

Figure 20. Referral Overview Tab

Notice: You are operating in a test environment

VA Community Provider Portal

VHA CC2 TestUser | Application Admin | Supporting Apps | Sign out

Referrals | Consults

Joe Doe Smith, 9th

Referral: #xyzzy-10-0050-0015 12/18/17 10:00 Physical Therapy Visit Medicine Assigned

Referral Details

Documents

Appointments

Status

Notes

Overview

Request Priority
Urgent

Duration of the Episode of Care
11/01/17 - 11/30/17

Consult #
[10-0004](#)

Comment

Coordinator
VHA CC2 TestUser

SSN
7709

Other Health Insurance
Insurance Provider #9

Community Provider

Community Provider NPI:
1215301908

Name
RIX LISA

Specialty
Counselor Addiction (Substance Use Disorder), Counselor Professional

Address
1949 4TH ST NE , WASHINGTON, DC 20002-1211

Telephone Number
202-380-8706

Fax Number

Save

[Return to top](#)

Department of Veterans Affairs

[Privacy Policy](#)

[News](#) | [Feedback](#) | [Download User's Guide](#) | [FAQ](#)

cui-cpp-development-121117-9c97b2aa

2. Select the **Appointments** tab. The Appointment table displays all upcoming appointments for the Veteran, even VHA appointments and appointments for other Community Provider referrals. Only Community Provider referrals can be edited.

Figure 21. Appointments Tab

VA Community Provider Portal

VHA CC2 TestUser | Application Admin | Supporting Apps | Sign out

Referrals | Consults

Joe Doe Smith, 9th

Referral: #xyzy-10-0050-0015 12/18/17 10:00 Physical Therapy Visit Medicine Assigned

Referral Details

Documents

Appointments

Appointment	Date	Details	Approved
type two	1/2/18 15:30 EST	Scheduled By: Billy Boy, III Specialty: Counselor Addiction (Substance Use Disorder)	Approve Edit
type one	12/30/17 23:45 EST	Scheduled By: Joe Bob, Jr. Specialty: Counselor Addiction (Substance Use Disorder)	Approve Edit

Appointment Description

Community Provider

Appointment Date/Time

RIX LISA

Add Appointment

Showing 1 to 2 of 2 entries

Previous 1 Next

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. The system automatically associates newly created appointments with the currently selected referral.

4. Figure 22. Add Appointment on the Appointments Tab

Notice: You are operating in a test environment

VA Community Provider Portal

VHA CC2 TestUser | Application Admin | Supporting Apps | Sign out

Referrals | Consults

Joe Doe Smith, 9th

Referral: #xyzy-10-0050-0015 12/18/17 10:00 Physical Therapy Visit Medicine Assigned

Referral Details

Documents

Appointments

Status

Notes

Appointment	Date	Details	Approved
type two	1/2/18 15:30 EST	Scheduled By: Billy Boy, III Specialty: Counselor Addiction (Substance Use Disorder)	Approve Edit
type one	12/30/17 23:45 EST	Scheduled By: Joe Bob, Jr. Specialty: Counselor Addiction (Substance Use Disorder)	Approve Edit

Appointment Description

Community Provider

RIX LISA

Appointment Date/Time

Add Appointment

Showing 1 to 2 of 2 entries

Previous 1 Next

Return to top

Department of Veterans Affairs

Privacy Policy

News | Feedback | Download User's Guide | FAQ

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- To Edit an appointment, select the record in the table. The fields that can be modified will become editable. Make any necessary changes and click the **Save** link.
- Select the **Documents** tab

Figure 23. Document Tab

Notice: You are operating in a test environment

VA Community Provider Portal

VHA CC2 TestUser | Application Admin | Supporting Apps | Sign out

Referrals

Consults

Joe Doe Smith, 9th

Referral: #kzyzy-10-0050-0015 12/18/17 10:00 Physical Therapy Visit Medicine Assigned

Referral Details

Documents

Appointments

Status

Notes

Documents

File Name	Document Type	Uploaded By	Reviewed By	Date	
2016_rubykaigi.pdf	VHA Form	Samantha Smith	<input type="checkbox"/> Reviewed	12/18/17 10:00 EST	Delete
1-10-500-500-100.jpg	Lab Result	All Qtc	<input type="checkbox"/> Reviewed	12/18/17 10:00 EST	Delete

Document Name

Browse

Document Type

Select document type:

Add Document

Showing 1 to 2 of 2 entries

Previous 1 Next

+ Deleted Documents

Return to top

Department of Veterans Affairs

Privacy Policy

News | Feedback | Download User's Guide | FAQ

cui-cpp-development-121117-9c97b2aa

7. Select the **Browse** button. The Browse dialog box appears.
8. Select the desired 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 new document will be added to the Documents table.
10. To edit a document, select the record in the table. The fields that can be modified will become editable. Make any necessary changes and click the **Save** link.
11. To **delete a document** you must click on the “delete” to the right.

Documents

File Name	Document Type	Uploaded By	Reviewed By	Date	
Screen Shot 2017-12-18 at 4.23.26 PM.png	Medical Record	VHA CC2 TestUser	<input type="checkbox"/> Reviewed	12/18/17 16:58 EST	Edit Delete
2016_rubykaigi.pdf	SAR	Super Qtc	<input type="checkbox"/> Reviewed	12/18/17 10:00 EST	Delete

- a. Select the appropriate reason for deleting the document

Documents

File Name	Document Type	Uploaded By	Reviewed By	Date	
Screen Shot 2017-12-18 at 4.23.26 PM.png	Medical Record	VHA CC2 TestUser	<input type="checkbox"/> Reviewed	12/18/17 16:58 EST	Edit Delete
2016_rubykaigi.pdf	SAR	Super Qtc	<input type="checkbox"/> Reviewed	12/18/17 10:00 EST	Delete

Document Name

Document Type

[Add Document](#)

Previous 1 Next

Delete Document

File Name:
[2016_rubykaigi.pdf](#)

Reason for deletion:
Please Select a Reason

[Delete](#) [Cancel](#)

File Name	Document Type	Uploaded By	Deleted By	Deleted Date
1-10-500-500-100.jpg	Referral Packet	Triage Qtc	VHA CC2 TestUser 12/18/17 Incorrect Patient	12/18/17 16:59 EST

Showing 1 to 1 of 1 entries

Previous 1 Next

b. Once selected, you will be able to view a list of deleted documents.

Deleted Documents

File Name	Document Type	Uploaded By	Deleted By	Deleted Date
2016_rubykaigi.pdf	SAR	Super Qtc	VHA CC2 TestUser 12/18/17 Incorrect Patient	12/18/17 17:07 EST
1-10-500-500-100.jpg	Referral Packet	Triage Qtc	VHA CC2 TestUser 12/18/17 Incorrect Patient	12/18/17 16:59 EST

Showing 1 to 2 of 2 entries

Previous 1 Next

12. Select the **Status** tab

Figure 24. Status Tab



- a. Select the appropriate status, enter a note, if desired, and click the **Submit** button. The status of the Referral is updated. If the status is updated to Assigned or Request Information, an email containing the new status and the contents of the note is sent to the Community Provider's email address. The Referral Details tab is re-displayed. In addition, the status change appears as a record on the Notes tab.

13. Select the **Notes** tab

Figure 25. Notes Tab

- a. Enter a note in the Add Note box and click the Submit button. The note is added to the top of the Notes table. (Note: Notes cannot be edited once submitted.)

==l(588(G"@ "\$\$%3

For details on how to add a new referral, see the New Referral to an Existing Consultation section followed by the Edit Referral section.

=;l (JK,#-*(#+(%(9,@ @ "\$"&#(G"@ "\$\$%3

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 28. Add SAR Form

The screenshot shows a web application interface titled "Documents". It features a table with columns: File Name, Document Type, Uploaded By, Reviewed By, and Date. There are two entries in the table. Below the table is a form to add a new document, with fields for Document Name and Document Type. The Document Type dropdown menu is open, showing a list of options: Authorization, Lab Result, Medical Record, Prescription, Radiology Record, Referral Packet, VHA Form, and SAR. The SAR option is highlighted in blue.

File Name	Document Type	Uploaded By	Reviewed By	Date
Refdoc-Word.docx	Medical Record	Non VHA TestUser	<input type="checkbox"/> Reviewed	August 9, 2017 at 4:30 PM EDT
1280px-Brain MRI-PNG.jpg	Medical Record	VHA CC TestUser	<input type="checkbox"/> Reviewed	August 9, 2017 at 4:29 PM EDT

Showing 1 to 2 of 2 entries

Document Name

Document Type
 Select document type:
 Select document type:
 Authorization
 Lab Result
 Medical Record
 Prescription
 Radiology Record
 Referral Packet
 VHA Form
 SAR

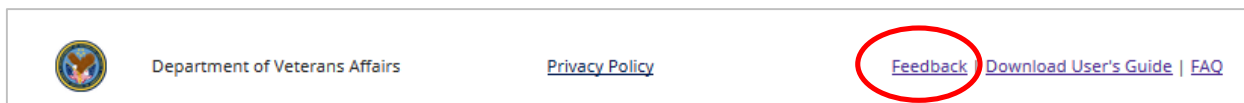
14. Delete Referral

Referrals cannot be deleted. Instead, the status of a referral that is no longer needed can be set to "Closed". See **13.5 Edit Referral - Select the Status tab** for instructions on how to change the status of a referral.

15. Provide Feedback on Site

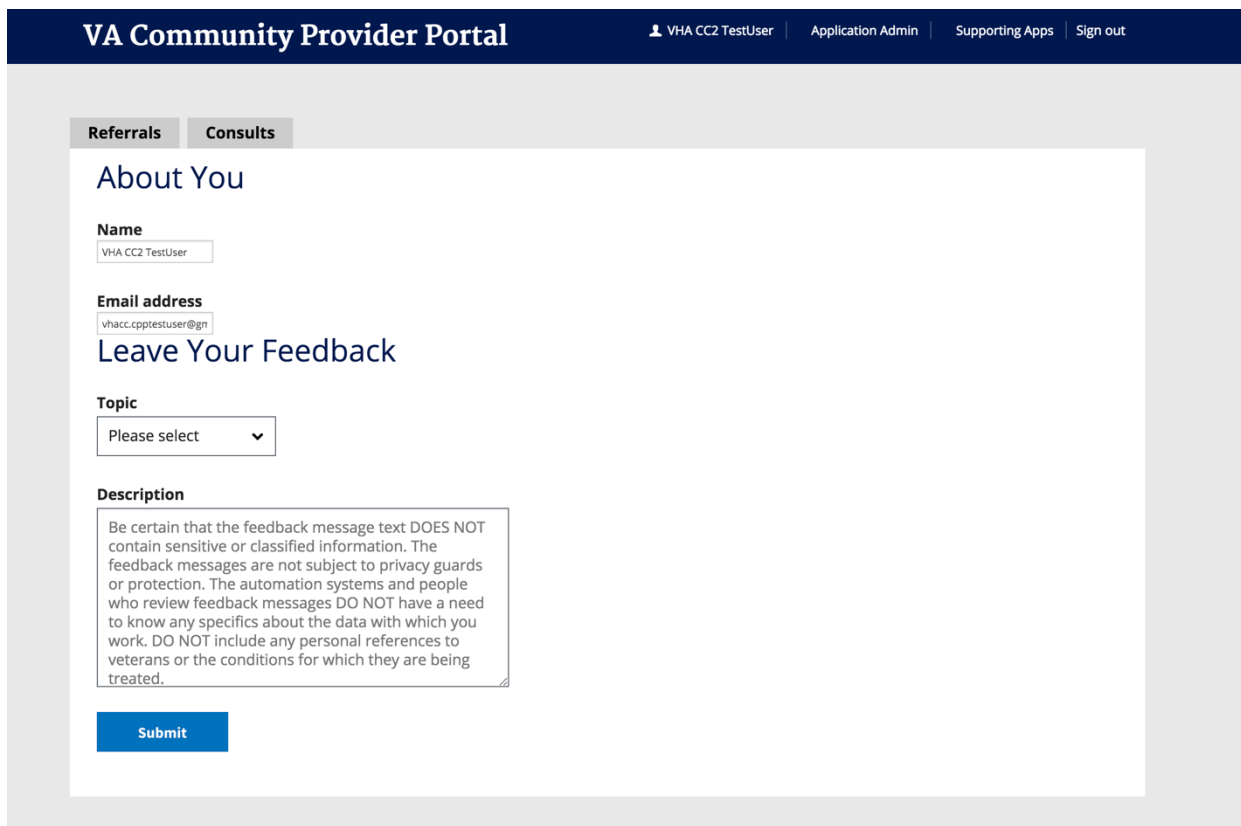
1. From any page in the application, you can click the Feedback link in the footer to provide feedback to the creators of the application.

Figure 27. Feedback link in Footer



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 28. Feedback Form



[Return to top](#)



Department of Veterans Affairs

[Privacy Policy](#)

[News](#) | [Feedback](#) | [Download User's Guide](#) | [FAQ](#)

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

Figure 29. Thank You Message



16. Sign Out

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

Figure 30. Sign Out Link

The screenshot shows the VA Community Provider Portal interface. The top navigation bar is dark blue with the text "VA Community Provider Portal" on the left. On the right, there are links for "VHA CC2 TestUser", "Application Admin", "Supporting App", and "Sign out". The "Sign out" link is circled in red. Below the navigation bar, there are two tabs: "Referrals" and "Consults". The "Referrals" tab is active. Below the tabs, there is a section titled "Community Provider Referrals" with an "Export Data" button. To the left of the "Filter" section, there is a "Referral Queues" list with the following items: "Urgent (427)", "New (142)", "Prep (143)", "Assigned (143)", "Review Pending (143)", and "Information Needed (143)". The "Filter" section contains three columns of input fields: "Date Range" with "From" and "To" fields, "Authorization Number", "First Name", "Consult Number", "Last Name", and "Category of Care" with a dropdown menu set to "All".