Patient Viewer App

User Manual

U.S. Department of Veterans Affairs

Veterans Health Administration

Office of Connected Care

December 2017

User Manual

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Overview

The Patient Viewer, Version 3.1 (Patient Viewer) mobile application (app) allows U.S. Department of Veterans Affairs (VA) care teams to find information quickly from patients' Electronic Health Records (EHRs) from the convenience of a mobile device. With the app, VA care teams can have a better understanding of a patient's health and gain immediate access to certain EHR data – whether they are walking the halls of a VA medical facility or on the go.

This app is available for iOS, Android and Windows operating systems, and is supported by these Internet browsers:

1. Internet Explorer 9 and higher
2. Safari 7 and higher
3. Firefox 24 and higher
4. Google Chrome 30 and higher

This user manual provides an in-depth, step-by-step guide for using the Patient Viewer App.

The Basics

Prerequisites

To use the Patient Viewer App, you must be a VA health care professional with credentials for the Veterans Health Information Systems and Technology Architecture (VistA). **NOTE:** There are additional prerequisites for using the Video Visit Applet, which are available in the Prerequisites for using the Video Visit Applet section of this user manual.

Logging In

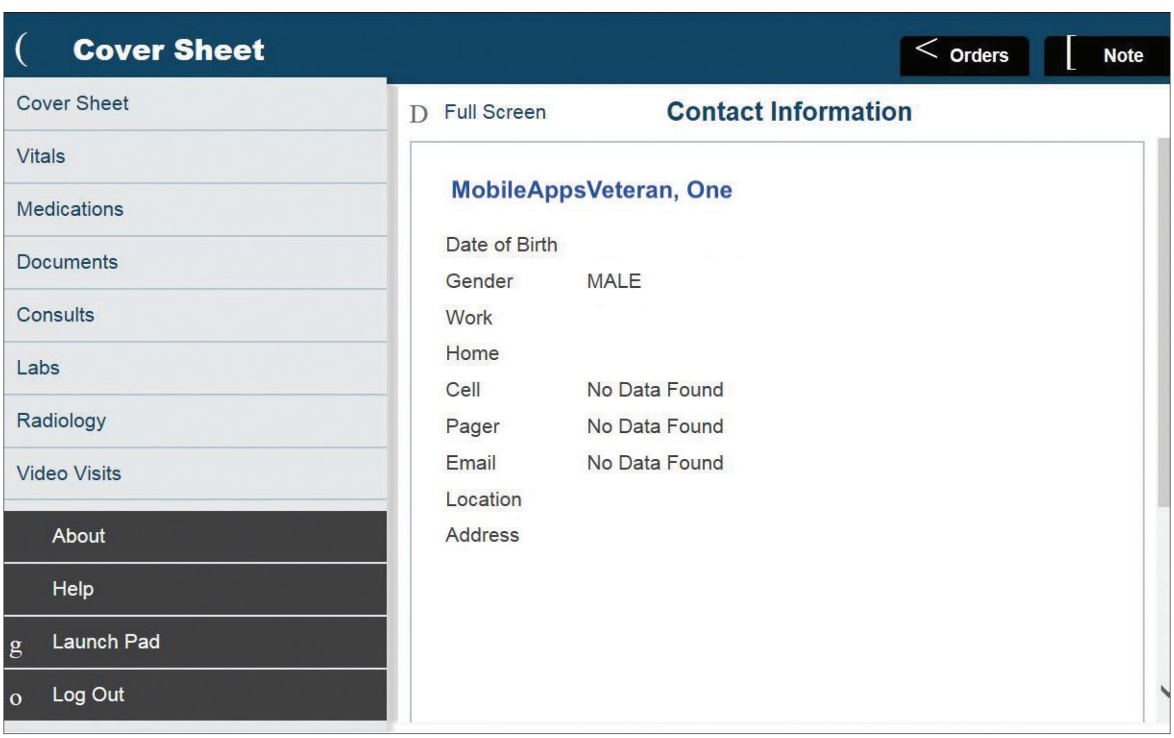
Access the Patient Viewer App > Tap **Login** > Enter your VistA credentials (Access Code, Verify Code and Station ID) > A list of matching facilities will appear in a drop-down list > Tap your VA facility > Tap **Sign In**. **NOTE:** You can access the Patient Viewer App either directly or through the VA Launchpad. The VA Launchpad contains links to all VA apps that connect to VA's EHR. By signing into the VA Mobile Launchpad once with your VistA credentials, you can access multiple resources from one location and without having to log in to each app or website individually.

Understanding and switching to Patient Record and Staff Views

You will have two options for viewing data in the Patient Viewer App:

- Patient Record View – Search for a specific patient and view information from his or her EHR, including cover sheet, vital signs, inpatient medications, outpatient medications, documents, consults, laboratory results and radiology reports.
- Staff View – View your task list for saved but unsigned mobile progress notes or review consults filtered by service/specialty or ones you have placed. **NOTE:** Progress Notes are not entered into VistA until they are signed. You must sign the note in the app before it will be stored in the patient's record.

When you first log in to the app, your screen will default to the Patient Record View. To switch to the Staff View at any time, tap the folder icon with two arrows surrounding it in the upper right corner. You can switch back to the Patient Record View by tapping the icon again. The Patient Record View has a blue background while the Staff View has a teal background, to help you distinguish between the two at a glance.

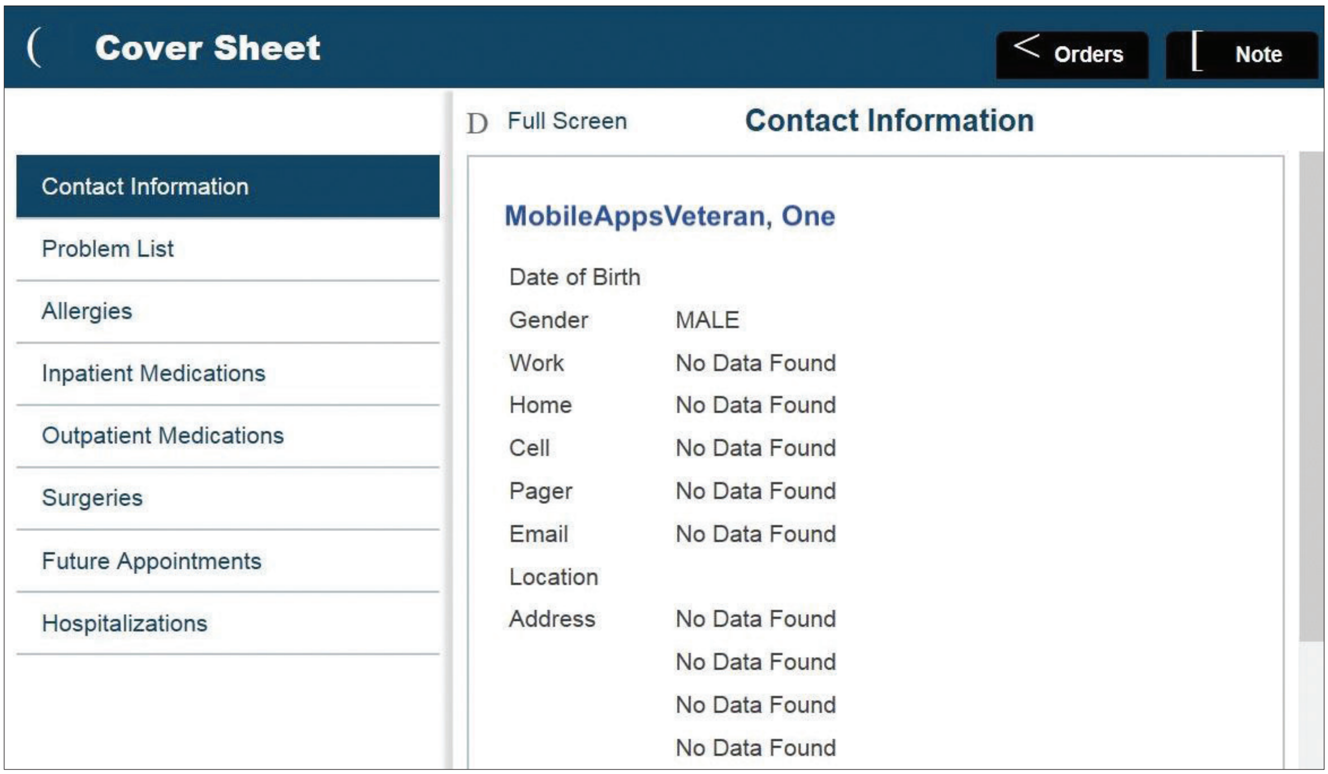


Expanding and reducing your screen's view

From either the Patient Record or Staff View, you can see the information (patient data or your tasks and consults) in full screen, or split the view into two screens: the filters and overviews of selections in the left pane, and the details of a specific selection in the right pane.

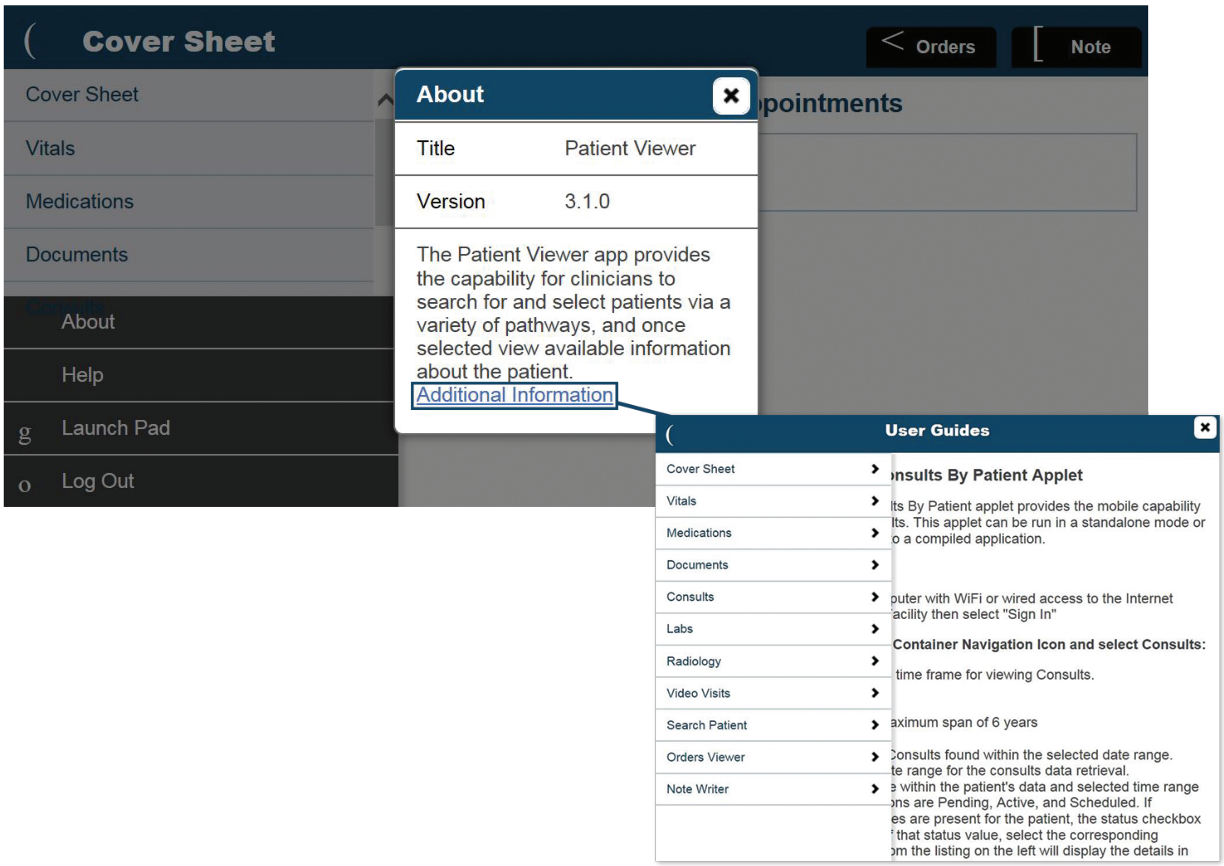
- If you split the view, tapping on a selection in the left pane will bring up the details in the right pane.
- If you view a selection in full screen, you can return to the category tabs by tapping **Reduce Screen** in the upper left corner.

You can switch your view by tapping either **Full Screen** or **Reduce Screen** next to the categories' titles.



Learning about the app

From either the Patient Record or Staff View, tap the four-line menu icon in the upper left corner of the screen > A slide-out menu will appear from the left > Tap **About** > A pop-up About window will appear that provides an overview of the app an explanation about its features. Either tap the **X** in the upper right corner to close the pop-up box, or tap **Additional Information** > A pop-up User Guides box will appear > Tap the four-line menu icon in the upper left of the pop-up User Guides box > A slide-out menu will appear > Tap the tab that corresponds to the section of the app you would like to learn more about > Tap the **X** in the upper right corner to close the pop-up User Guides box.



Accessing the VA Launchpad

Through the VA Launchpad, you can access other apps without re-entering your VistA credentials. No matter what information you are currently viewing, you can always access the VA Launchpad. From either the Patient Record or Staff View, tap the four-line menu icon in the upper left corner > A slide-out menu will appear > Tap **Launch Pad**.

Logging out

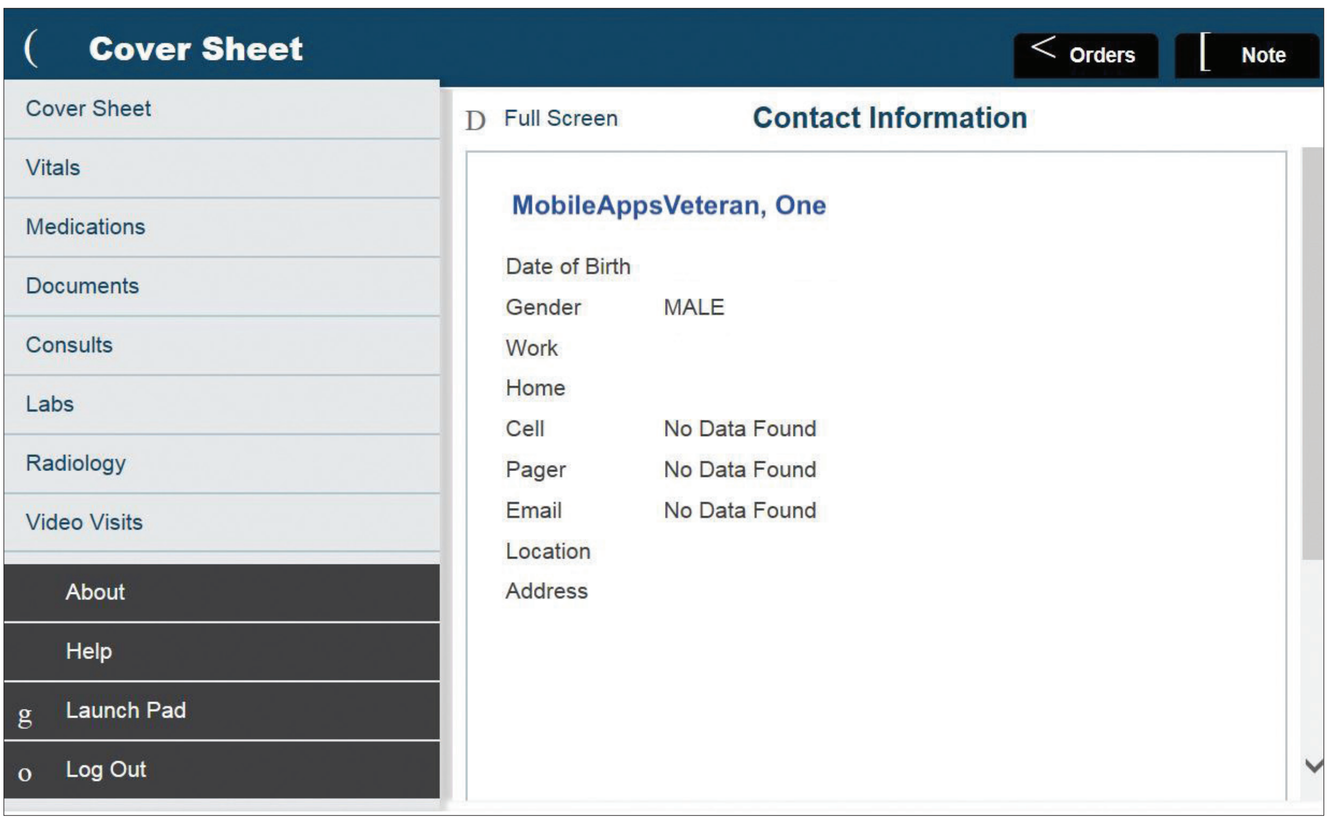
From either the Patient Record or Staff View, tap the four-line menu icon in the upper left corner > A slide-out menu will appear > Tap **Log Out**.

Patient Record View

Search for a specific patient and view information from his or her EHR including cover sheet, vitals, medications, documents, consults, labs, radiology and video visits.

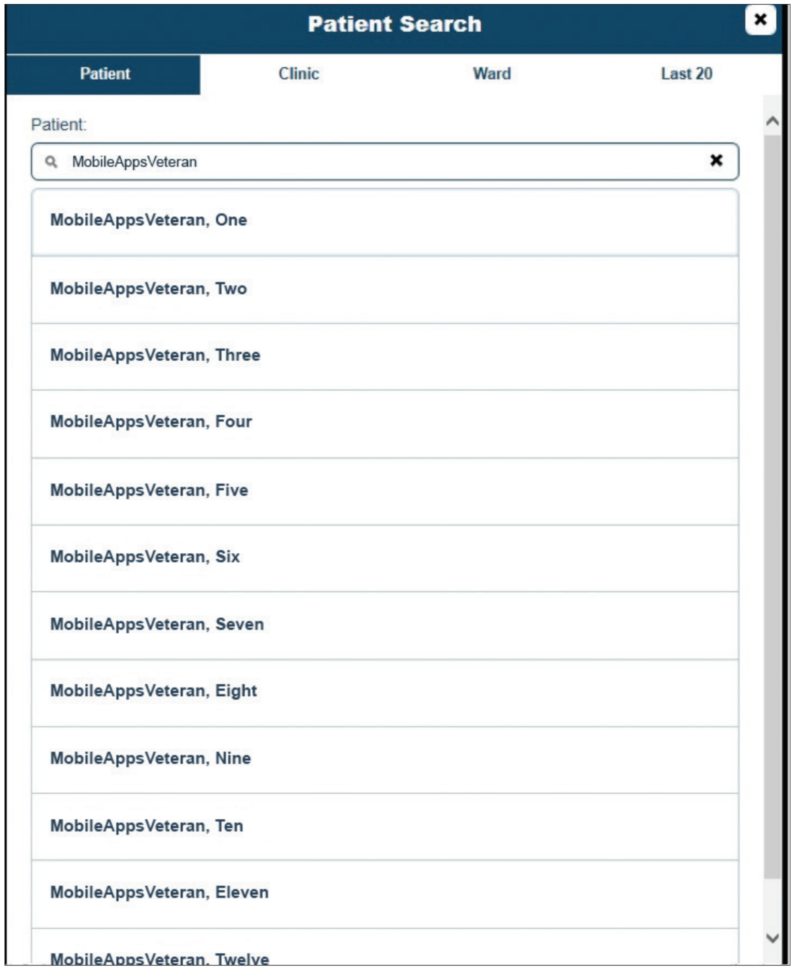
When you log in to the Patient Viewer App, your screen will default to the Patient Record View (which will have a blue background), and you will see a few features to help you navigate the app:

- Patient Search (magnifying glass icon) – Find a patient by name, social security number (SSN), clinic, ward or from a list of recently searched patients.
- Patient Information (file folder icon) – View an overview of a patient's information.
- Menu (four-line icon) – Access information about the app including cover sheet, vitals, medications, documents, consults, labs,radiology, video visits, about, help, VA Launchpad and log out.
- Orders Viewer – View a complete list of recent orders for the patient.
- Note – Enter a progress note for the patient.



Patient Search

Find a patient by searching by the patient's name, social security number, clinic, ward or from the last 20 patients for whom you searched.



Searching for a patient

The app will automatically load the last patient you accessed. To switch to a new patient, tap the magnifying glass icon in the upper left corner > A pop-up Patient Search box will appear > Search by tapping one of the four tabs at the top of the Search box:

- Patient – Begin typing either a patient's (1) last name, (2) last name and first name, (3) first initial of last name and last four digits of the social security number (with no spaces) or (4) full social security number > A drop-down list of matching patients will appear > Tap the patient whose information you would like to view.
- Clinic – Under the Appointment Date heading, either (1) tap **Use Current Date** to choose today's date or (2) to select a different date, tap the button with the date in a MM/DD/YYYY format > A pop-up box will appear > Scroll to select a past month, date and year (**NOTE:** You cannot choose a future date) > Tap **Set** to choose a date. Under the Clinic heading, begin typing in the name of a clinic > A drop-down list of clinics will appear > Under the Patient heading that appears, begin typing in the name of a patient to filter the patient list > A drop-down list of patients with appointments at the clinic on the selected date will appear > Tap the patient whose information you would like to view. You can further narrow down the list by typing a patient's name.
- Ward – Begin typing in the name of a ward > A drop-down list of wards will appear > Tap the name of the ward you would like to select > A drop-down list of patients currently admitted to the selected ward will appear > Tap the patient whose information you would like to view.

- Last 20 – A drop-down list of the last 20 patients for whom you selected will appear > Tap the patient whose information you would like to view.

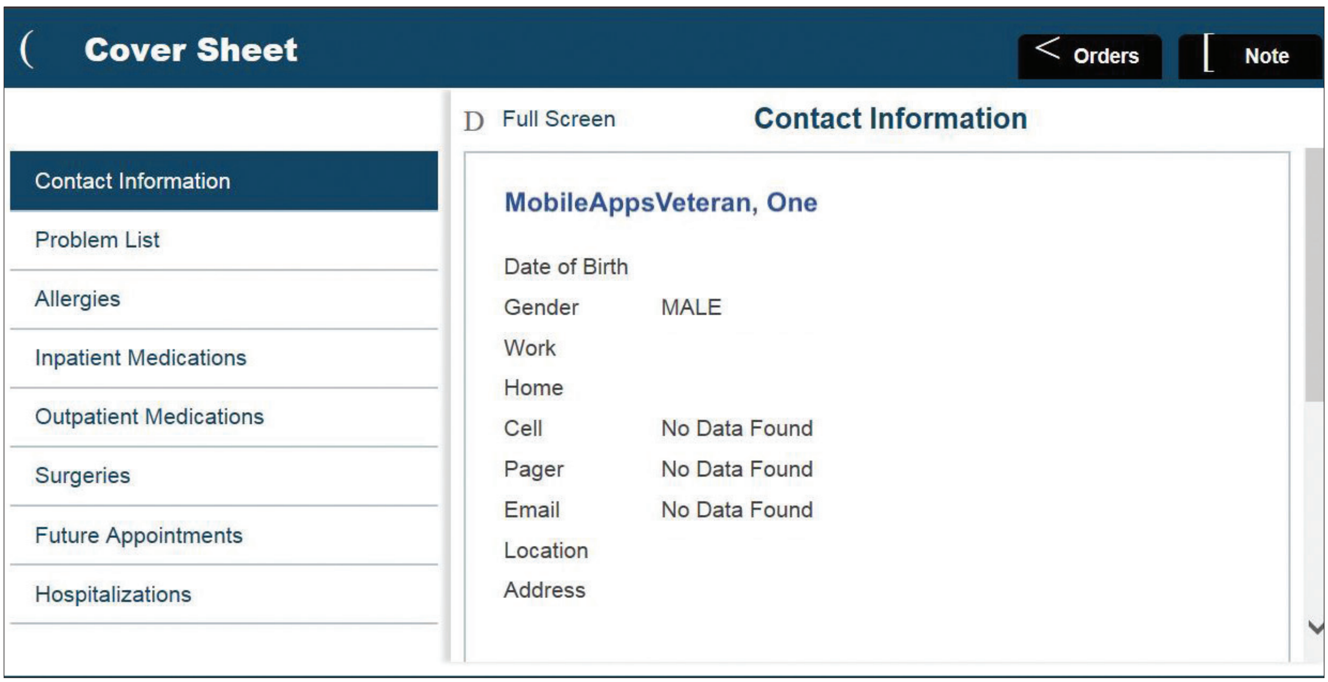
After tapping the desired patient's name from your search, a pop-up Select Patient box with the patient's overview information will appear > Tap **Select Patient** (or the **X** in the upper right corner to close without selecting) > You will go to the selected patient's contact information screen in his or her cover sheet.

Viewing a patient's overview information

After you have searched for and selected a patient, his or her overview information will appear in the bar on the top of the screen. You will see the name, birth date, age, gender and social security number. To see a patient's admission status and information, tap the file folder icon > A pop-up Patient Info box will appear.

Cover Sheet

A patient's cover sheet provides an easy, outlined way to view his or her health history and visits to VA medical facilities.



Viewing a patient's cover sheet

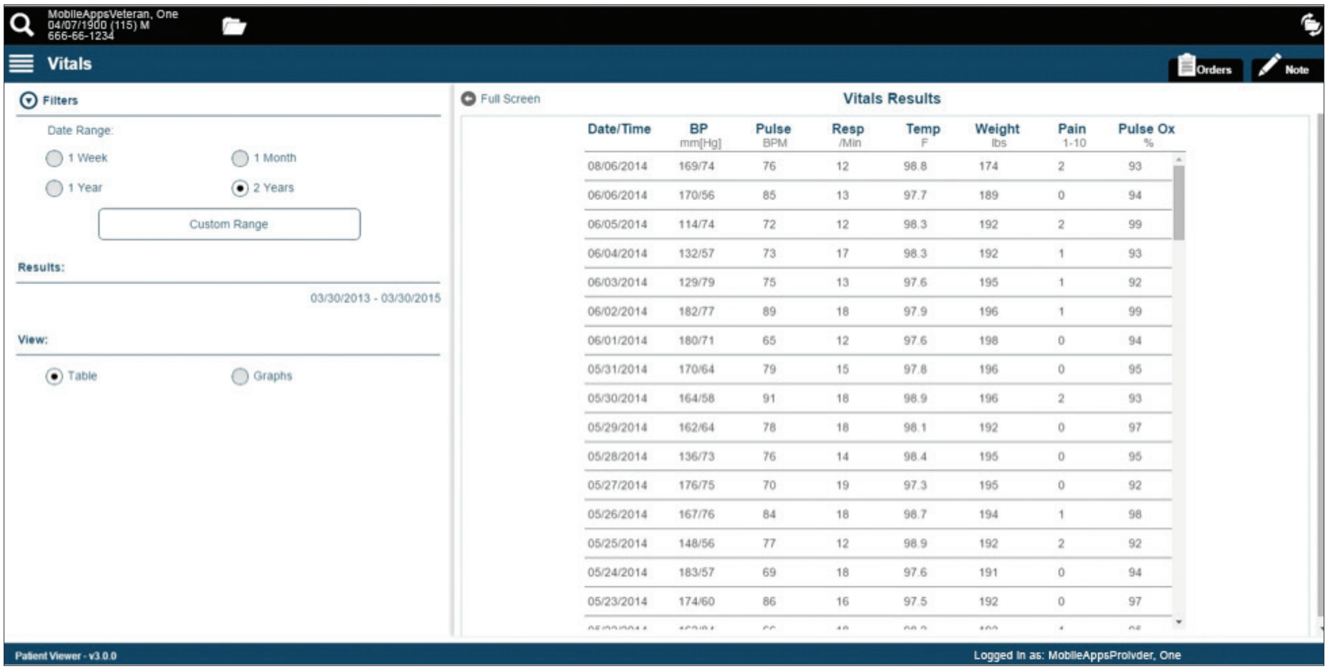
Make sure you have a patient selected, and then tap the menu button with the four-line icon in the upper left corner > A slide-out menu will appear > Tap **Cover Sheet** > You will see a list of categories:

- Contact Information – Contact details for the patient and next of kin.
- Problem List – A list of past health issues, including the date the issue occurred.
- Allergies – The allergen, reaction and facility where the reaction was documented.
- Inpatient Medications – Active and recently expired (within 120 days) inpatient medications a patient is prescribed if currently admitted, with their status (active, discontinued or expired) and source. **NOTE:** Additional medication details are available in the Medications tab.
- Outpatient Medications – Active and recently expired (within 120 days) outpatient medications, with their status (active or expired) and source. **NOTE:** Additional medication details are available in the Medications tab.
- Surgeries – Description, date of surgery and facility where the surgery was conducted.
- Future Appointments – Appointment date and facility name.
- Hospitalizations – Admission date and facility name.

Tap on a category you would like to view > You will go to a screen that shows the patient's details for the topic.

Vitals

The Vitals tab allows you to view a patient's vital signs (Blood Pressure, Pulse, Respiration, Temperature, Weight, Pain, Pulse Oximetry, etc.) as a table or a graph.



Viewing your patients' vitals

Make sure you have a patient selected, and then tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Vitals** > Narrow down the results by using the filters:

- Date Range – Tap the circle next to 1 Week, 1 Month, 1 Year, 2 Years, or tap **Custom Range**. If you choose to customize a date range, a pop-up Date Range box will appear > Tap the date next to Start Date, and enter the start date in the form of MM/DD/YYYY. Tap the date next to End Date, and enter the end date in the form MM/DD/YYYY > Tap **Apply** to set the range and close the Date Range box. **NOTE:** The customized date range cannot exceed six years.
- View – Tap the circle next to either Table or Graphs, and your data will appear as either a graph or a table under the Vitals Results heading in the right pane of your screen. See the Reading the vitals graph section of this User Manual for additional details on viewing and filtering the vitals in graph form.

Reading the vitals table

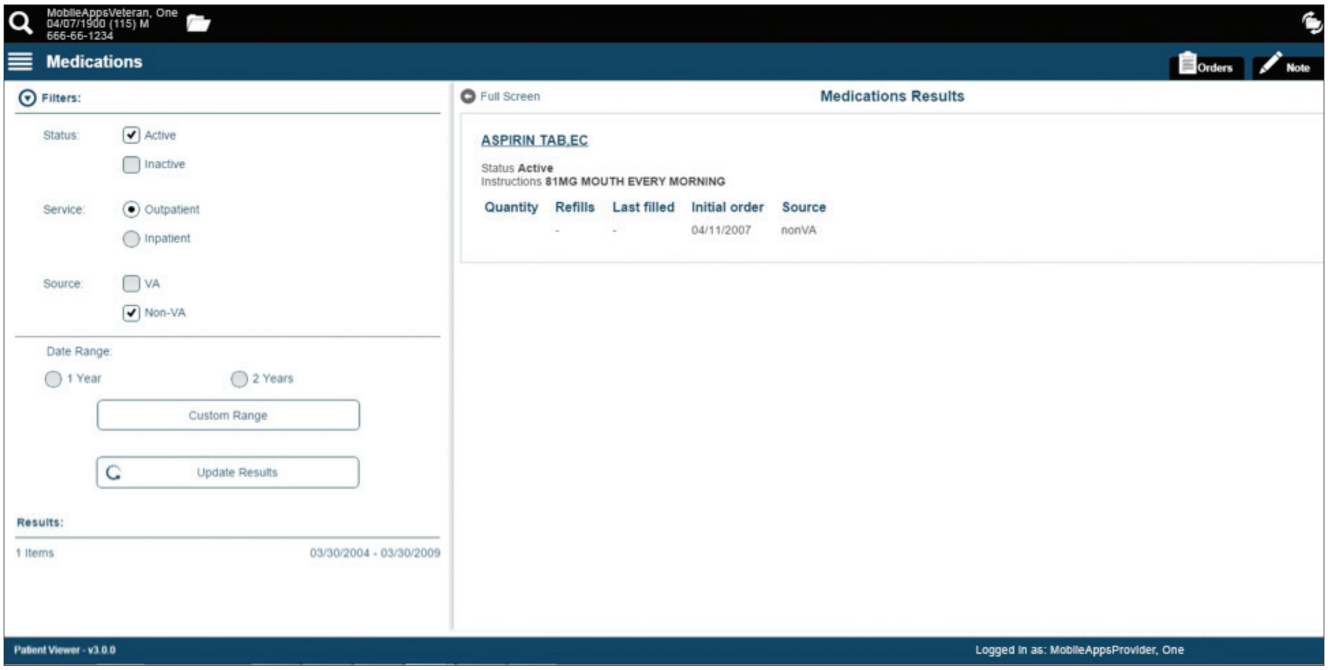
If you choose to view your patient's vitals as a table, you will see a list of dates, and the reading for vital signs documented on that date. Scroll through the data by using the scroll bar to the right of the table.

Reading the vitals graph

If you choose to view your patient's vitals as a graph, tap the checkboxes next to the Graph Types you would like to view (BP, Pulse, Respiration, Temp, Weight, Pain and Pulse Ox) > A graph for each graph type you have selected will appear in the right pane of your screen > Scroll through the data by using the scroll bar to the right of the graphs. Tap on a point on the graph to view specific information about that entry, including date, time and specific readings. After you have graphed your information, you can change the date range by tapping the circles next to 1 Week, 1 Month, 1 Year, 2 Years or Custom Range along the top of the Vital Results screen. **NOTE:** If you are using a device with a touchscreen, you can zoom in on a point in the graph by touching two fingers to the point you would like to expand and sliding them apart. If you are using a mouse, you can zoom in on a point in the graph by picking a point and scrolling horizontally with your mouse.

Medications

Even though an overview of a patient's medications is available in his or her Cover Sheet, more details are available in the Medications section. You can see the medication name, status, instructions, quantity, refills remaining, date it was last filled, date of initial order and whether it was prescribed by a VA or non-VA provider.

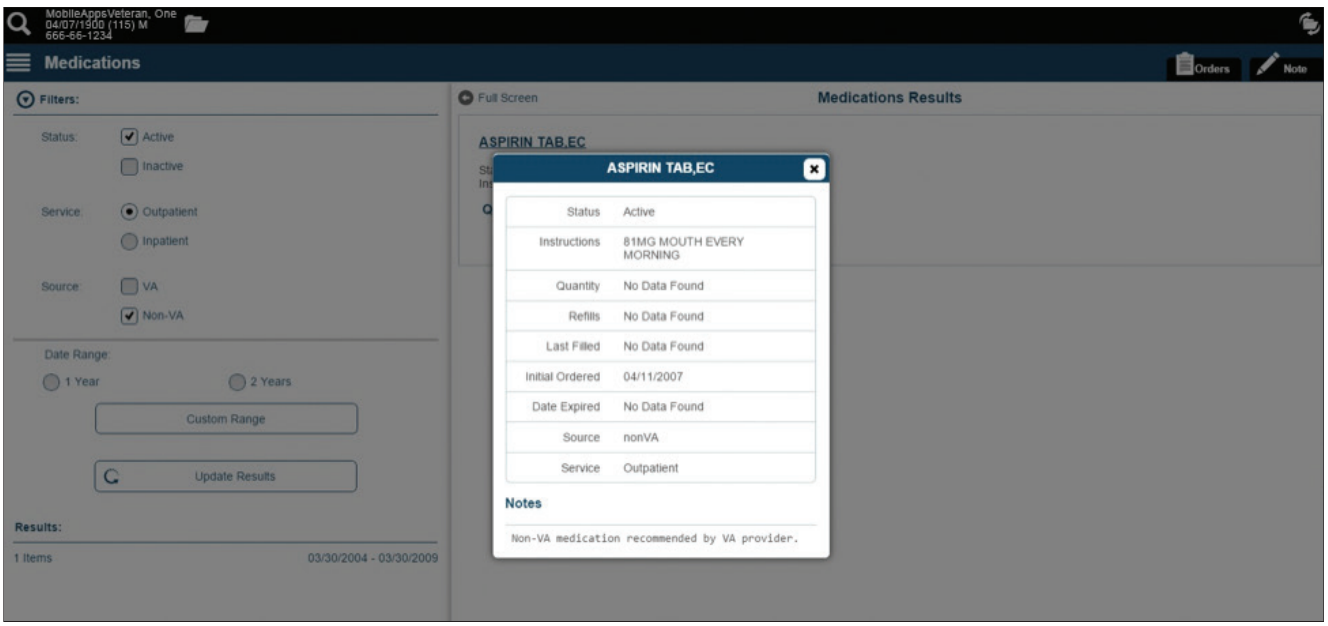


Viewing a patient’s medications

Make sure you have a patient selected, and then tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Medications** > Narrow down the results by using the Filters:

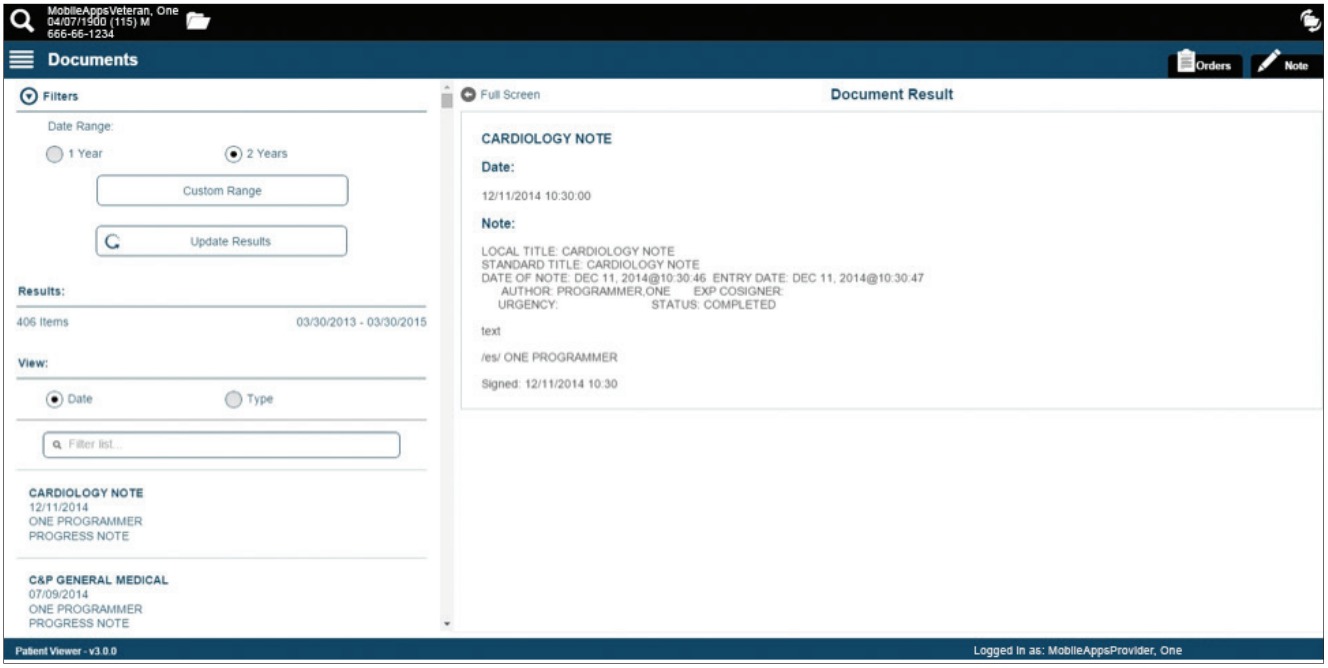
- Status – Tap the checkbox next to Active and/or Inactive.
- Service – Tap the circle next to either Outpatient or Inpatient.
- Source – Tap the checkbox next to VA and/or Non-VA.
- Date Range – Tap the circle next to either 1 Year, 2 Years, or tap **Custom Range**. If you choose to customize a date range, a pop-up Date Range box will appear > Tap the date next to Start Date and End Date. Enter the date in the form MM/DD/YYYY, or tap the date from the pop-up Calendar that appears > Tap **Apply** to set the range and close the Date Range box. **NOTE:** The customized date range cannot exceed six years.

Tap **Update Results** > A list of results that match your search specifications will appear under the Medications Results heading > Tap on a specific medication you would like to view > You will see a pop-up box with the medication’s details > Tap the **X** in the upper right corner to close the pop-up box. You must tap **Update Results** every time you change your filter selections.



Documents

See details about your patient's discharge summaries, pathology reports, progress notes, radiology and surgery reports.



Viewing a patient's documents

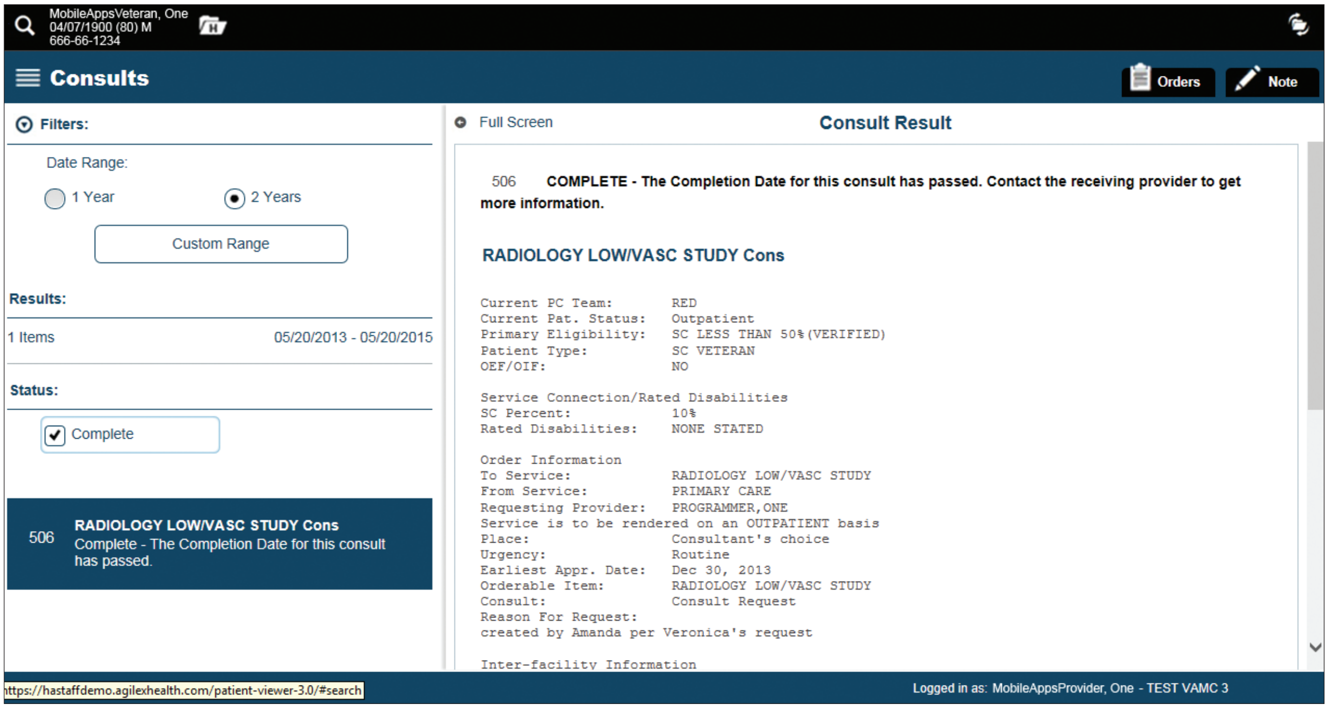
Make sure you have a patient selected, and then, tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Documents** > Narrow down the results by using the Filters:

- Date Range – Tap the circle next to either 1 Year, 2 Years, or tap **Custom Range**. If you choose to customize a date range, a pop-up Date Range box will appear > Tap the date next to Start Date and End Date. Enter the date in the form MM/DD/YYYY, or tap the date from the pop-up Calendar that appears > Tap **Apply** to set the range and close the Date Range box. **NOTE:** The customized date range cannot exceed six years. Tap **Update Results** > The dates you are searching will be updated. You must tap **Update Results** every time you change your filter selections.
- View – Tap the circle next to either Date or Type. If you choose Date, a list of your patient's documents will appear, beginning with the most recent. If you choose Type, your patient's documents will be sorted by category: Discharge Summaries, Pathology Reports, Progress Notes, Radiology and Surgery Reports > Tap on one of the categories to expand a list of documents within the specific category.
- Search – Search terms entered here can retrieve results that have the term anywhere in the document. For example, type part of a document's title into the Filter list search bar with a magnifying glass, and hit enter > You will see a list of documents containing that word > Tap the document you would like to view. To clear your search, tap the **X** in the Filter list search bar.

A list of results that match your search specifications will be available on the lower half of the left pane of your screen > Tap on a specific document you would like to view > The document's details will appear under the Document Result heading in the right pane of your screen.

Consults

View a patient's consults and sort by date range or status.



Viewing a patient's consults

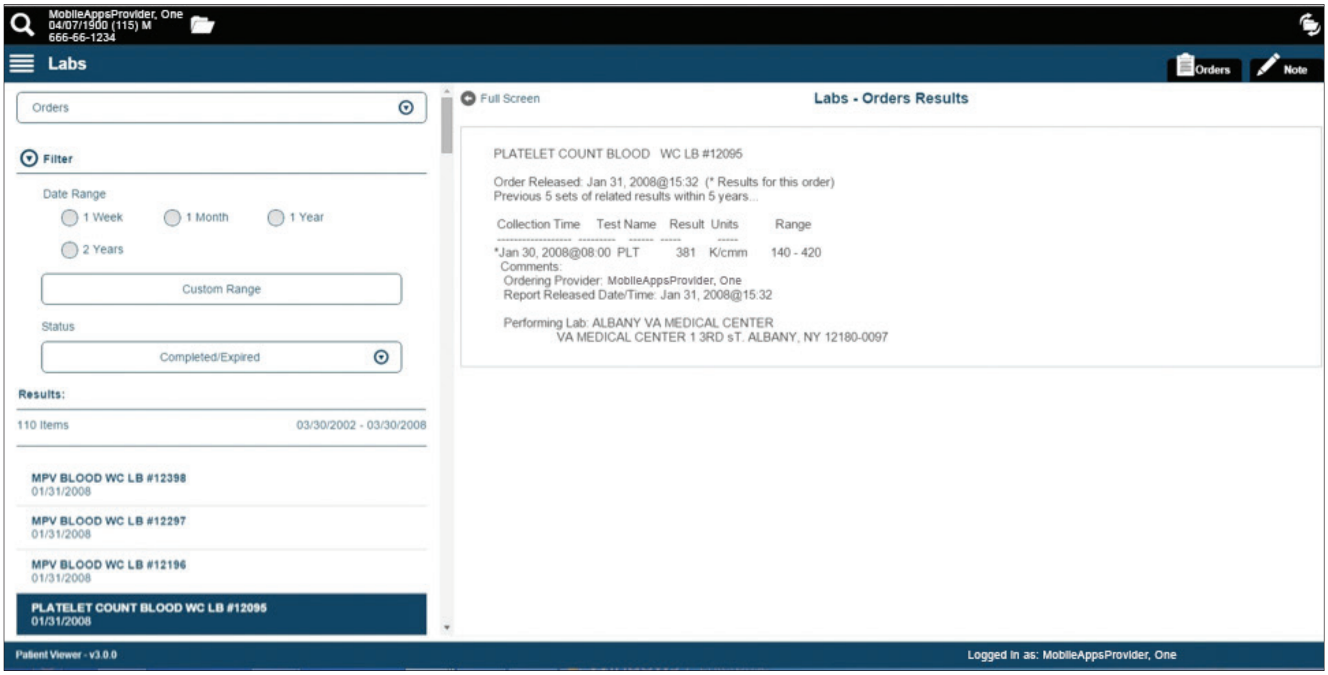
Make sure you have the patient selected, and then tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Consults** > Narrow down the results by using the Filters:

- Date Range – Tap the circle next to either 1 Year, 2 Years, or tap **Custom Range**. If you choose to customize a date range, a pop-up Date Range box will appear > Tap the date next to Start Date and End Date. Enter the date in the form MM/DD/YYYY, or tap the date from the pop-up Calendar that appears > Tap **Apply** to set the range and close the Date Range box. **NOTE:** The customized date range cannot exceed six years.
- Status – Tap the checkboxes next to the status of consults you would like to see (Pending, Complete and Partial Results). Only statuses for the consult results returned will be displayed.

A list of results that match your specifications will be available in the lower half of the left pane of your screen > Tap on a specific consult you would like to view > The consult's details will appear under the Consult Result heading in the right pane of your screen.

Labs

View graphs of a patient's chemistry/hematology lab results, and view written details about a patient's orders and microbiology results.



Viewing a patient's ordered lab results

Make sure you have a patient selected, and then tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Labs** > Lab results will default to Orders (or you can tap **Orders** from the drop-down menu at the top of the right pane of the screen) > Narrow down the results by using the Filters:

- Date Range – Tap the circle next to either 1 Week, 1 Month, 1 Year, 2 Years, or tap **Custom Range**. If you choose to customize a date range, a pop-up Date Range box will appear > Tap the date next to Start Date and End Date. Enter the date in the form MM/DD/YYYY, or tap the date from the pop-up Calendar that appears > Tap **Apply** to set the range and close the Date Range box. **NOTE:** The customized date range cannot exceed six years.
- Status – Tap the drop-down menu under Status > A pop-up screen will appear with a list of the different statuses you can choose from > Tap the status you would like to view to return to the Labs – Orders Results screen (or tap the **X** in the upper left corner of the pop-up screen to close without choosing a status).

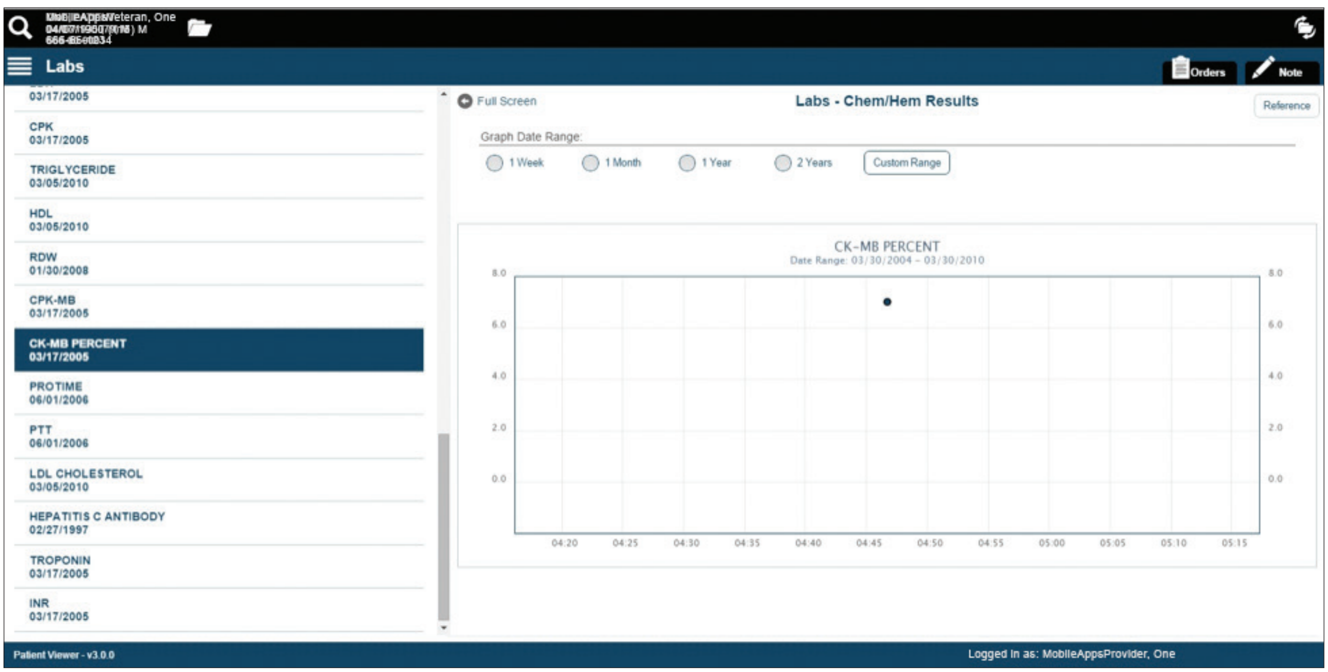
A list of results that match your specifications will be available in the lower half of the left pane of your screen > Tap on a specific lab orders result you would like to view > The orders details will appear under the Labs – Orders Results heading in the right pane of your screen. **NOTE:** The search criteria will apply only to your orders data.

Viewing a patient's chemistry/hematology lab result

Make sure you have a patient selected, and then tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Labs** > Labs will default to Orders > Tap the Orders heading and tap **Chem/Hem** from the drop-down list that appears > You will see a list of available chemistry and hematology lab results > To filter the list, type the name of the result you are looking for into the Filter list search bar and then select the result from the filtered list that appears (you can clear your filter search at any time by tapping the **X** in the Filter list search bar) > Tap the result you would like to see graphed and the graph will appear on the right pane of your screen > Tap on a point on the graph to view specific information about that entry, including date, time and specific readings. **NOTE:** To view the graph, you will have to be sure you are viewing the correct date range. Compare the date of the result you have selected with the range you are viewing.

Customizing a date range for a chemistry/hematology lab result

After you have selected a specific lab result, that result's information will appear in the right pane of your screen > You will see a Graph Date Range option along the top of your screen > Tap the circle next to either 1 Week, 1 Month, 1 Year, 2 Years, or tap **Custom Range**. If you choose to customize a date range, a Date Range pop-up box will appear > Tap the date next to Start Date and End Date. Enter the date in the form MM/DD/YYYY, or tap the date from the pop-up Calendar that appears > Tap **Apply** to set the range and close the Date Range box > The graph will adjust to show the selected range **NOTE:** The customized date range cannot exceed six years.

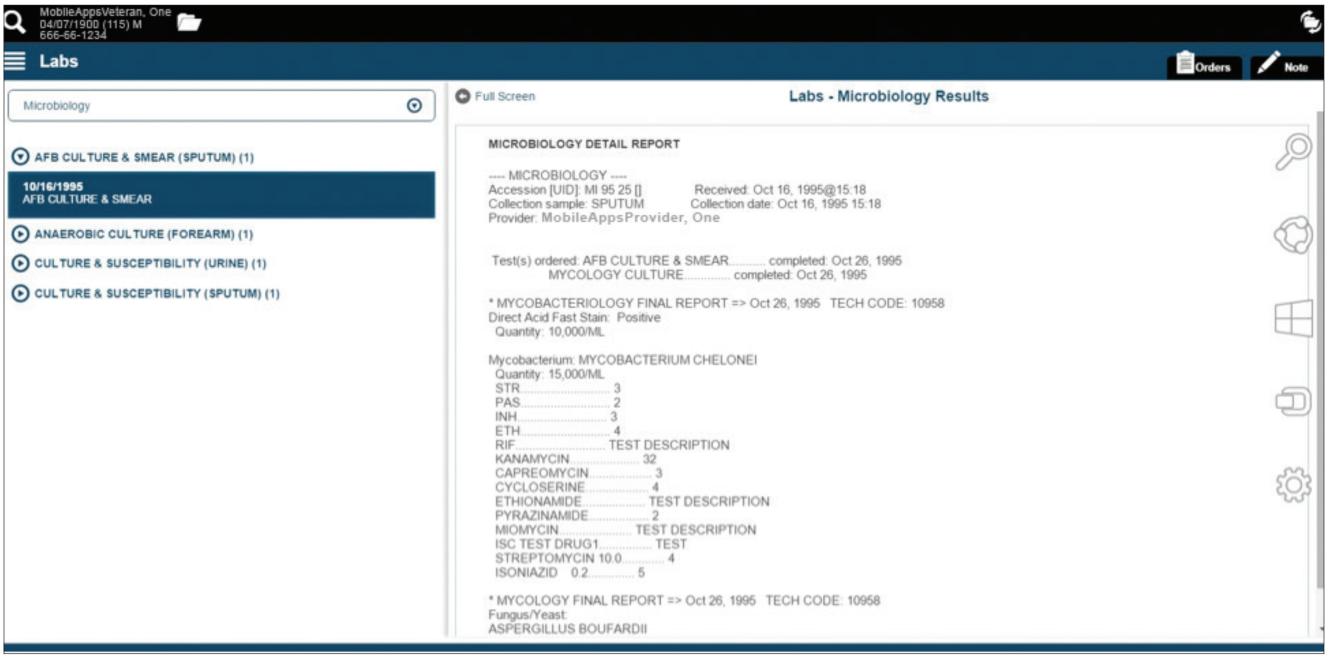


Accessing external resources to reference chemistry/hematology lab normal ranges

To see what the normal ranges are for chemistry/hematology labs, go to the graph of a specific lab result > Tap **Reference** in the upper right corner of the screen > A separate browser window will open to the ***labtestsonline.org*** website for your reference.

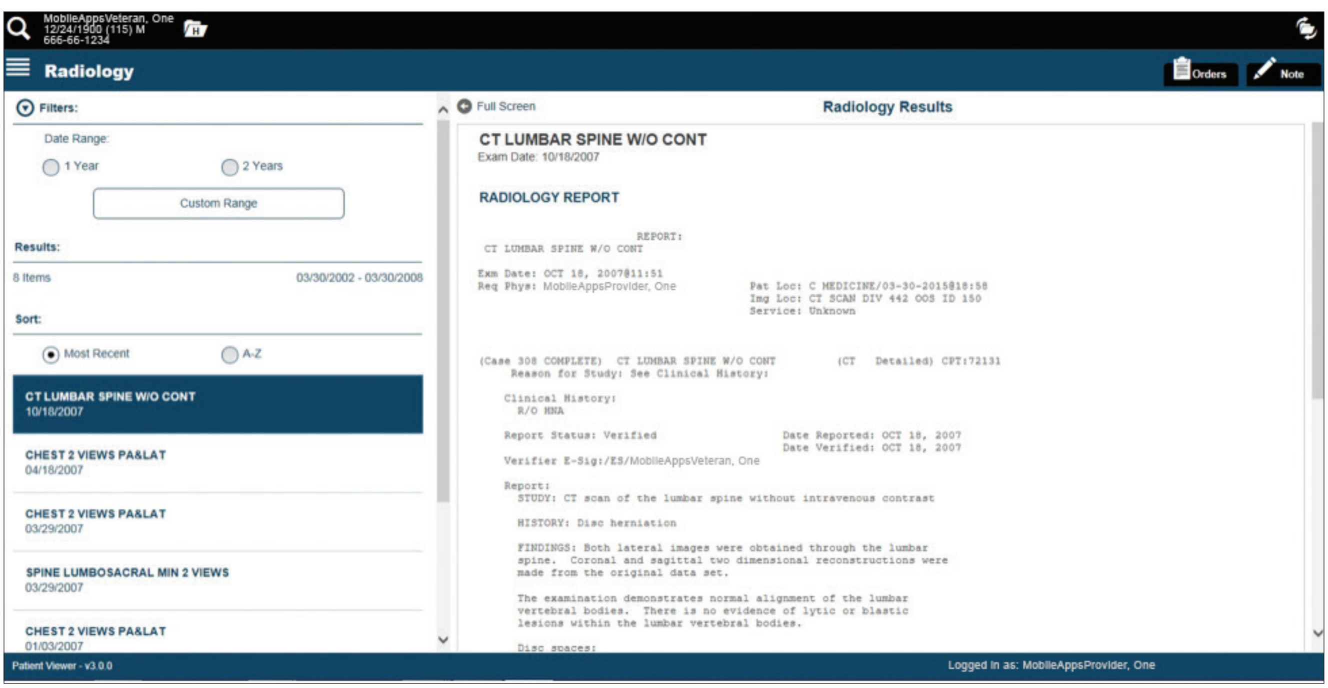
Viewing a patient's microbiology lab results

Make sure you have a patient selected, and then tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Labs** > Lab results will default to Orders > Tap the **Orders** heading, and tap **Microbiology** from the drop-down list that appears > The types of Microbiology labs will appear below the heading > Tap on a type of Microbiology lab, and a list of the specific labs of that type will expand below > Tap a specific lab you would like to view > The lab result's detailed report will appear below the Lab Results heading in the right pane of your screen.



Radiology

View a patient's radiology reports.

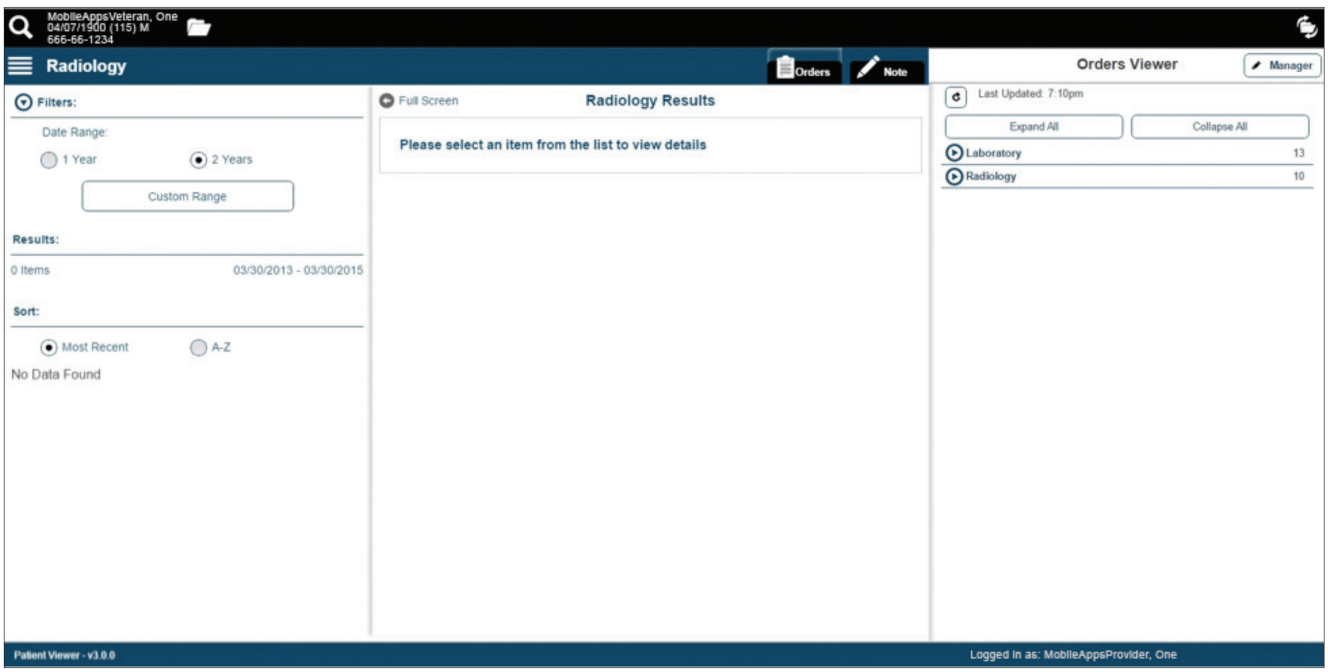


Viewing a patient's radiology results

Make sure you have a patient selected, and then tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Radiology** > Narrow down the results by using the Filters:

- Date Range – Tap the circle next to either 1 Year, 2 Years, or tap **Custom Range**. If you choose to customize a date range, a pop-up Date Range box will appear > Tap the date next to Start Date and End Date. Enter the date in the form MM/DD/YYYY, or tap the date from the pop-up Calendar that appears > Tap **Apply** to set the range and close the Date Range box. **NOTE:** The customized date range cannot exceed six years.
- Sort – To sort the radiology reports by either most recent or alphabetically, tap the circle next to either Most Recent or A-Z. If you choose to search alphabetically, you will see your results grouped by test name. Tap the category you would like to expand, and then tap the date of the test you would like to view.

A list of results that match your specifications in the order you chose will appear > Tap on a specific radiology report you would like to view > The radiology report's details will appear under the Radiology Results heading in the right pane of your screen.



Video Visits

Prerequisites for using the Video Visit Applet

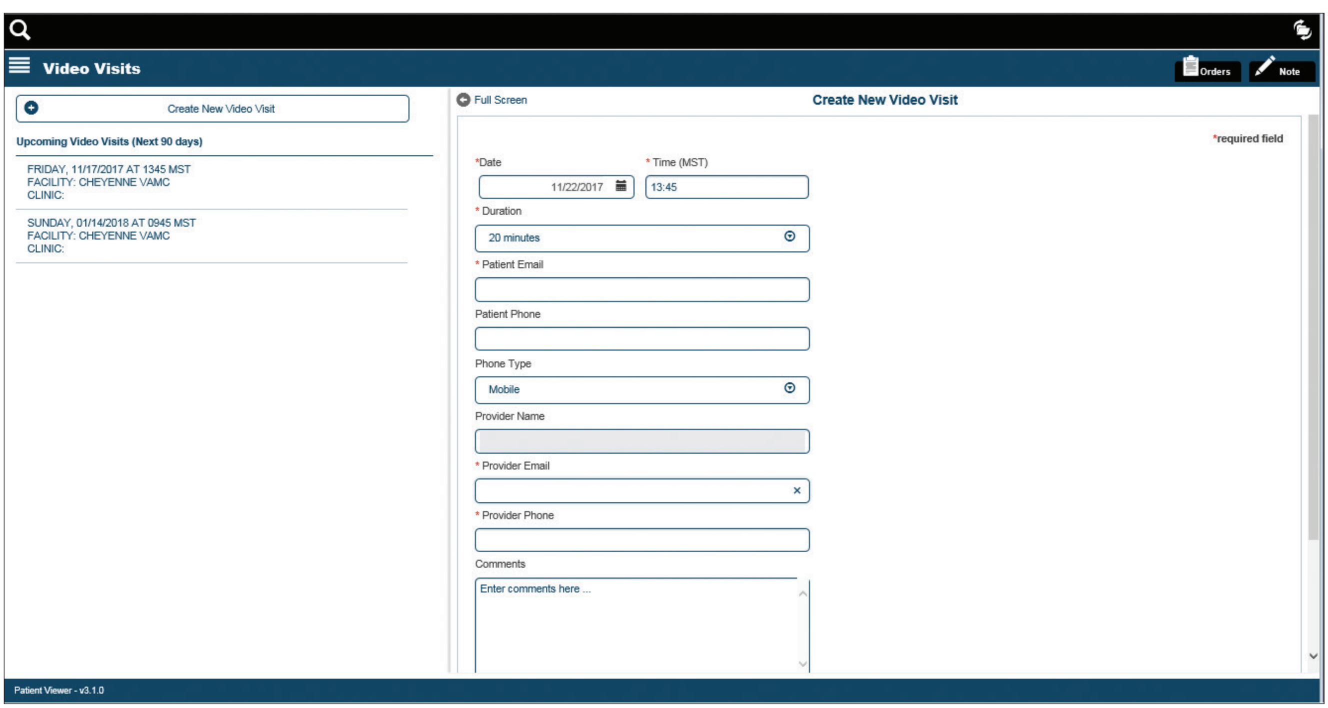
To use the Video Visit Applet, you must have a GFE laptop or desktop with a camera and microphone or a GFE iPad with a PIV waiver. Your patient will need a laptop or desktop with a camera and microphone or any smart phone or tablet. You need to verify that both you and your patient have a proper device prior to booking a video appointment. You can use Patient Viewer on your GFE desktop to book the Video Appointment, but both you and your patient must use a device with a camera and microphone to conduct the video appointment.

Creating a new video visit

Schedule a video visit with a patient and email the link to participate. First, make sure you have a patient selected, and then tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Video Visit** > Tap **Create New Video Visit**, and a form to create a new video visit will appear in the right pane of your screen > Confirm or update the following fields in the Create New Video Visit form:

- Date – Tap the current date, and type in the date in the form MM/DD/YYYY for which you would like to schedule the video visit.
- Time – Tap the blank field next to the date > A pop-up box to select the hour and minute will appear > Scroll to the hour and minute (00, 15, 30 or 45) for which you would like to schedule the video visit > Tap **Set**.
- Duration – The default duration for a video visit is 20 minutes. To change the duration, tap the field under Duration, and a drop-down menu will appear > Tap one of the following, 15 minutes, 20 minutes or 30 minutes.
- Patient Email – To edit, tap the Patient Email field, and type in the patient's email address.
- Patient Phone and Phone Type – To edit, tap the Patient Phone field, and type in the patient's phone number > Tap the Phone Type field and a drop-down menu will appear > Tap either **Mobile**, **Home**, **Work** or **Fax**.
- Provider Name – Your name will be in this field and cannot be changed.
- Provider Email – To edit, tap the Provider Email field, and type in your email address. **NOTE:** Your email address is not shared with the patient.
- Provider Phone – To edit, tap the Provider Phone field, and type in your phone number. **NOTE:** Your phone number is not shared with the patient.
- Comments – Type in any comments you have for your Veteran patient (up to 250 characters).
- Instructions to Patient – If you would like to include additional instructions with the new visit request, tap the circle next to Yes > A Select Instructions field will appear > Tap the field, and tap one of the following from the drop-down menu:
  - **Medication Review** – A general message, indicating you would like to talk with the Veteran about medication will appear in a text field below.
  - **Video Visit Preparation** – A general message with information about participating in a video visit will appear in a text field below.
  - **Other** - A blank text field will appear below > Tap the blank box, and type in the additional instructions (up to 10,000 characters) you would like to send to the patient along with the new video visit.

Tap **Create** to create the new video visit > A pop-up confirmation box will appear to let you know the video visit has been booked, and an email will be sent to you and the Veteran with a link to start the video visit > Confirm you receive an email at your email address, and confirm your patient receives a similar email. Additionally, the video visit will be added to the list of upcoming appointments. To cancel, tap **Cancel**, and a pop-up Cancel Appointment will appear asking if you are sure you want to cancel. Tap **Yes, Cancel** to continue and exit the new video form, or tap **No, Continue** to return to the new video form.



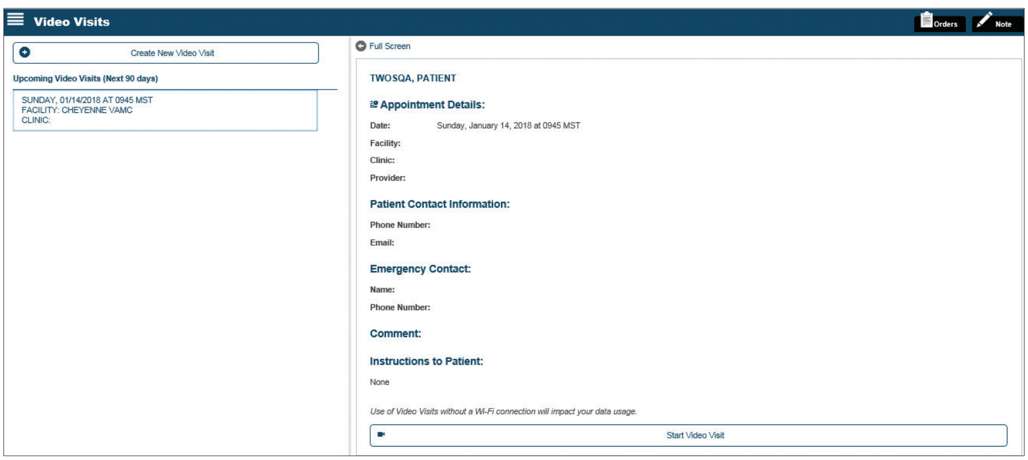
Viewing a Veteran's upcoming video appointments

Make sure you have a patient selected, and then tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Video Visit** > You will see all video visit appointments for the patient, which are scheduled within the next 90 days on the left pane of your screen > Tap a visit, and additional details of that visit including date, time, provider, clinic, facility, provider entered comments and any additional instructions selected or entered by the provider will appear in the right pane of your screen.

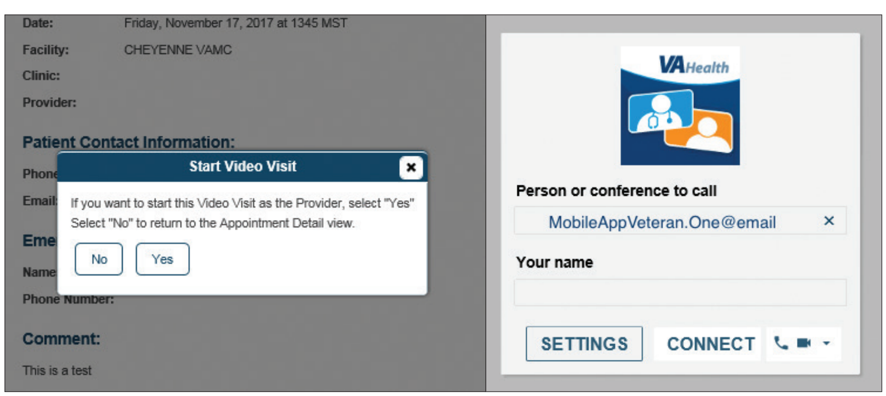
Starting a video visit

There are two ways to start a video visit.

1. Via email link: Execute the link in the email you received, and ask your patient to do the same.
2. Via the Patient Viewer 3.1 App: First make sure you have a patient selected, and then tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Video Visit** > You will see all video visit appointments for the patient which are scheduled within the next 90 days on the right pane of your screen > Tap the visit you would like to begin, and additional details of that visit will appear in the right pane of your screen > Tap **Start Appointment**.



The video appointment app will open in a new browser tab > Type in your first and last name and allow camera and microphone access > Open the video visit for the Veteran patient > Verify that you can conduct a video session with your patient. **NOTE:** The video visit will run outside of the Patient Viewer App in VA Video Connect. For more information on using VA Video Connect, visit the VA Video Connect intranet site, which is accessible via this link: ***http://vaww.telehealth.va.gov/pgm/vvc/index.asp***. There are various resources available on this site, most of which may be accessed by going to Resources (right-hand side) and then VA Video Connect Documents, which launches the Telehealth SharePoint document library with a filter on for VA Video Connect documents.



Orders Viewer

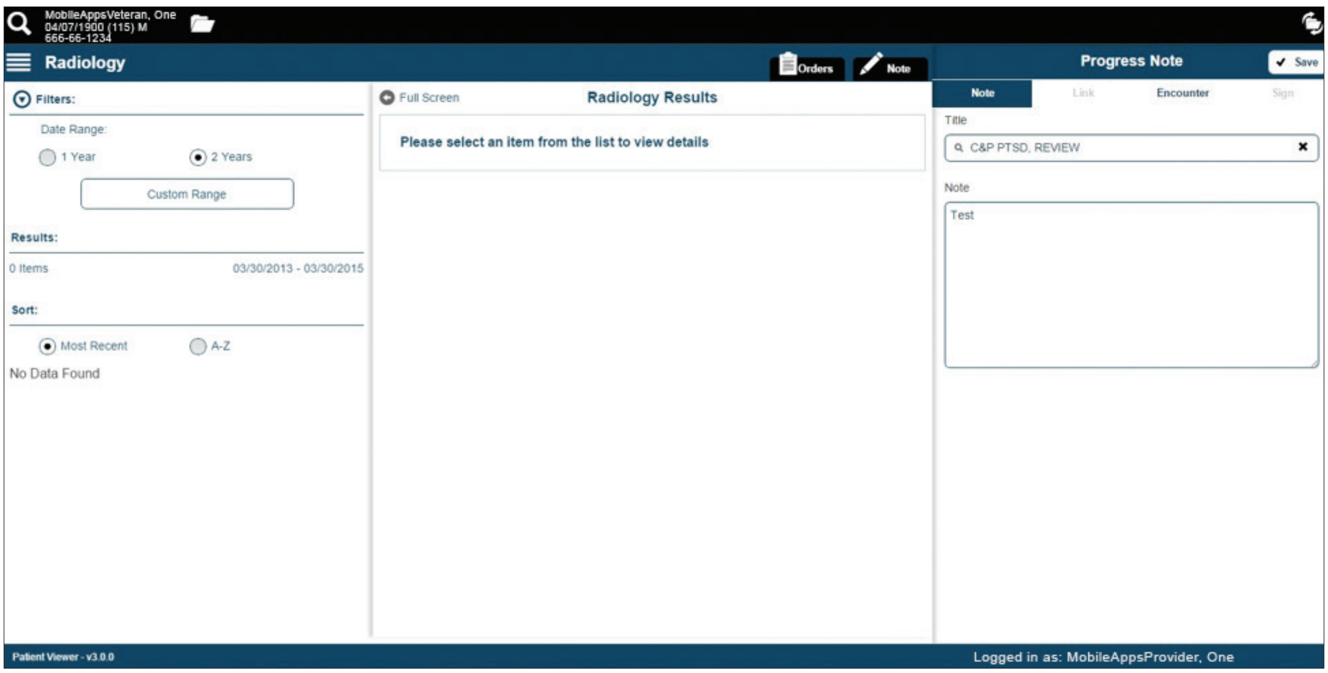
View all orders related to the patient you have selected.

Using the Orders Viewer

Tap **Orders** (with the clipboard icon) in the upper right corner of your screen > A slide-out Orders Viewer menu will appear from the left side of your screen > You will see a list of the types of orders > Tap on a type of order, and a list of the specific orders of that type will expand below (You can expand or collapse all orders by tapping **Expand All** or **Collapse All**) > Tap an order you would like to view > You will see a pop-up screen with the order's details. To close the screen, tap the **X** in the upper right corner of the pop-up. You can refresh the orders list by tapping the circular arrow next to Last Updated at the top of the Orders Viewer slide-out menu. To close the Orders Viewer, tap **Manager** (the button with the pencil icon) in the upper right corner, or tap **Orders** (with the clipboard icon) again.

Notes

Enter a progress note, or finish a note you started previously.



Using the progress note menu

Tap **Note** (pencil icon) in the upper right corner > A slide-out Progress Note menu will appear from the left side of your screen > You will see four options along the top:

- Note – Enter a progress note.
- Link – Link a progress note to an existing medical event.
- Encounter – Provide contextual information about the progress note.
- Sign – Sign the progress note.

You may also save your note to come back to and finish later at any time. To do so, tap **Save** in the upper right corner.

NOTE: Progress Notes are not entered into VistA until they are signed. You must sign the note in the app before it will be stored in the patient's record.

Entering a progress note

Begin typing the topic of the note in the Enter Note Title bar > A drop-down list of relevant titles will appear, with a list of titles you have used previously at the top > Tap the title you would like to use > Type your note in the text box under the Note header > If you have a note in progress, choose the title of that note and the text will auto-populate.

Linking a progress note to a medical event

After you have entered the progress note, tap **Link** > To link to a clinic event, tap **Clinic Appointment**, and tap your selection > To link to a hospital event, tap **Hospital Admission** > Tap **New Visit** > Tap the time under Time of Visit > Select the time of the visit and tap **Set** > Tap the date under Date of Visit > Select the date of the visit > Begin typing the location where the visit occurred under Location > A drop-down list of possible locations matching your search will appear > Select the location > If the visit was an historical one, tap the checkbox next to Historical Visit.

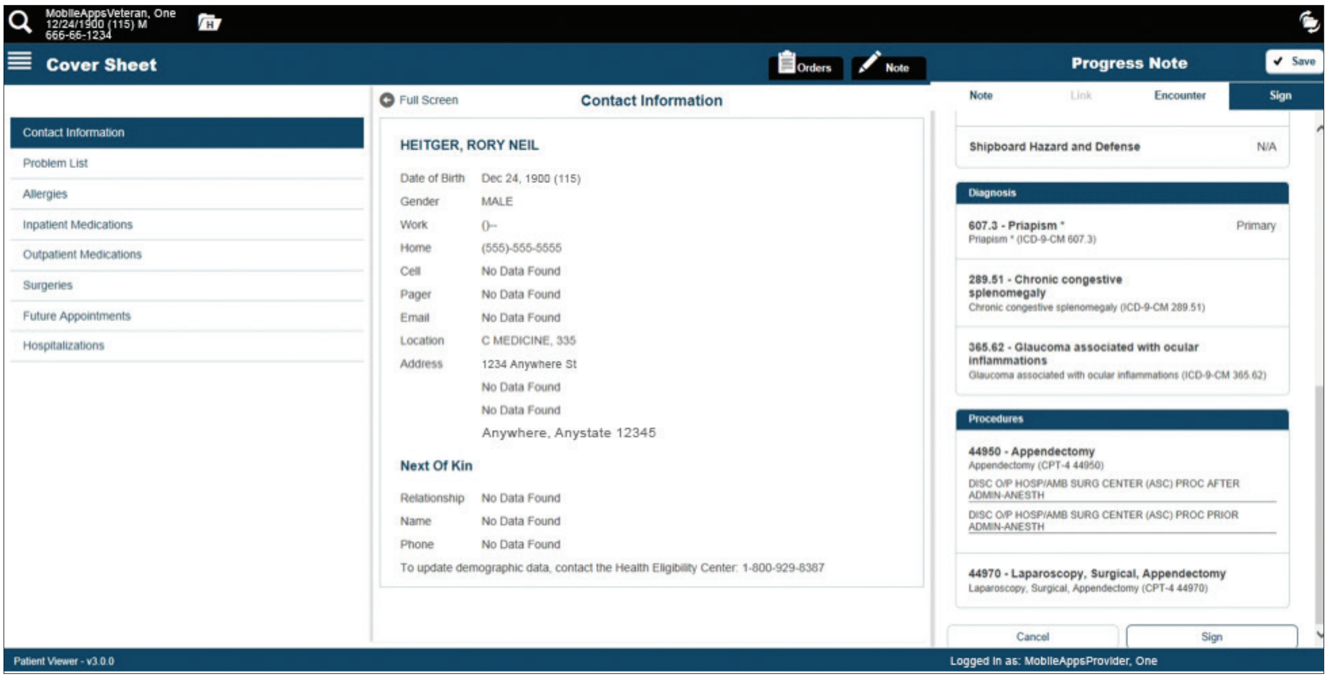
Entering information about the encounter

After you have entered the progress note, tap **Encounter** > You will see a list of information you should provide about the progress note. Tap each option to expand or collapse it, and enter the requested information.

- Visit Type – Tap **Visit Type** > Select the visit type from the options provided from the clinic.
- Providers - Tap **Providers** > You will see a list of providers already associated with the progress note, including yourself > Select a provider by tapping that person's name, or tap **Select All** or **Deselect All** to select or deselect all available providers > Tap **Remove** to remove a provider from the list. To add a provider to the list, tap the **Other Provider** bar and begin typing the name of the provider > A drop-down list of available providers matching your search will appear > Tap the provider you want to add > The provider's name will appear under the Available heading > Tap the radio button next to the provider you would like to designate as the Primary provider associated with the progress note.
- Related To - Tap **Related To** > You will see a list of service-related medical conditions > Tap either **Yes** or **No** next to each condition to indicate whether the progress note is related to that condition (Service Connected, Agent Orange, Radiation, Southwest Asia Conditions, MST, Combat Veteran and Shipboard Hazard and Defense).
- Diagnosis - Tap **Diagnosis** > You will see a list of the patient's existing diagnoses > Tap the checkboxes next to the diagnoses to select the diagnosis(es) that the progress note is related to > The diagnosis(es) you have chosen will appear under the Selected Diagnosis header at the bottom of the Progress Note Menu > Tap the checkboxes next to the selected diagnoses to add them to the Problem List, or tap the radial button next to a selected diagnosis to mark it Primary > Select a diagnosis by tapping it, or tap **Select All** or **Deselect All** to select or deselect all selected diagnoses providers > Tap **Remove** to remove a diagnosis from the list. If a diagnosis associated with the progress note is not already included, tap the **Add Diagnosis** bar > A pop-up Add Diagnoses box will appear > Begin typing into the Other Diagnosis bar > A list matching your search will appear > Tap the diagnosis(es) you would like to add > Tap the **X** in the upper right corner of the Add Diagnosis pop-up box to return to the Progress Note menu > The diagnosis(es) will be added to the Selected Diagnosis list on the Progress Note menu.
- Procedures - Tap **Procedures** > You will see a list of procedures associated with the progress note > Tap a procedure to select it, or tap **Select All** or **Deselect All** to select or deselect all procedures on the procedure list > Tap **Remove** to remove a procedure from the Procedure List > To add additional information about the procedure (such as whether it was performed by an assistant surgeon, whether it was related to a catastrophe or disaster, etc.), tap the Modifiers box next to the procedure > A pop-up list of modifiers will appear > Tap the checkboxes next to the modifiers you would like to select, and then tap **Done** > The modifiers will appear under the entry on the Procedure List (you can also tap the **X** in the upper right corner of the pop-up screen to exit without entering a modifier). If you would like to add a procedure to the procedure list, tap the Add Procedure bar > A pop-up Add Procedure box will appear > Begin typing a procedure name or Current Procedural Terminology (CPT) code into the Enter Procedure bar > A list matching your criteria will appear > Select the procedure you want > Tap the **X** in the upper right corner to close the pop-up Add Procedure box and return to the Progress Note menu.

Signing a progress note

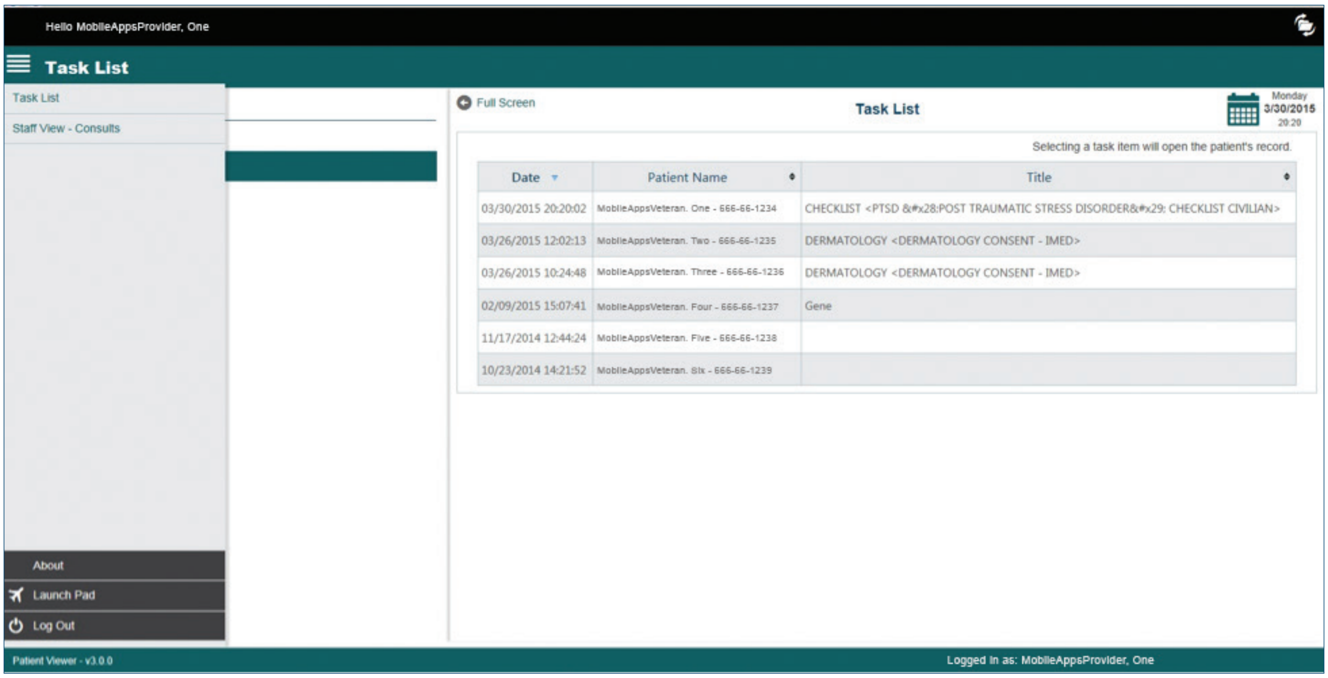
After you have entered all necessary Note, Link and Encounter information, tap **Sign** > You will see a summary of the information you have entered > Tap **Sign** at the bottom of the screen below the summary to sign the progress note, or tap **Cancel** to close the Progress Note menu without signing. All notes that you begin in the Patient Viewer App must also be signed in the Patient Viewer App. **NOTE:** If your notes require a co-signer, you cannot use the app to write and sign notes as there is no co-signature capability in this version of the app.



Staff View

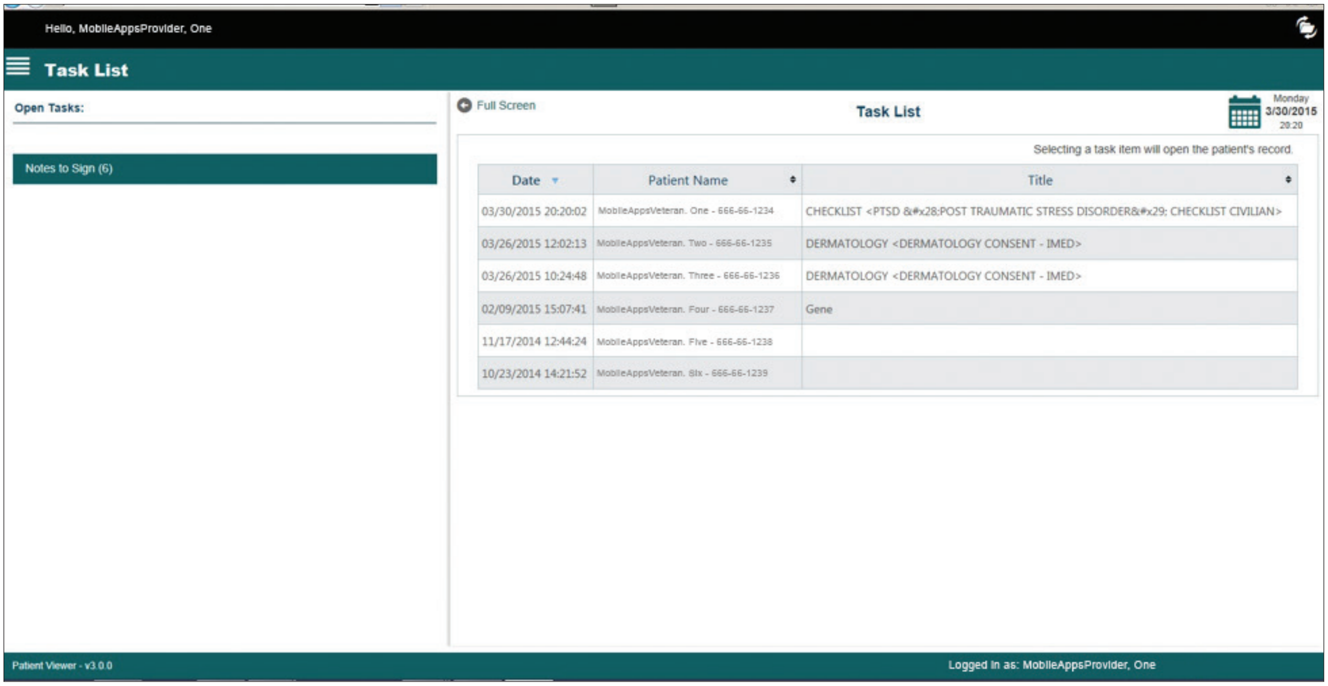
Staff View is not patient specific and allows you to view notes not yet completed through the Task List or consults you have conducted through Staff View – Consults.

When you log in to the Patient Viewer App, your screen will default to the Patient Record View > Tap the folder icon with two arrows surrounding it in the upper right corner of your screen and you will go to the Staff View (the background will change to teal) > Your screen will default to your Task List. Tap the menu (four line icon in upper left corner) to access information about the app, your Task List, the Staff View - Consults, the VA Launchpad and to log out of the app.



Task List

The Veteran Administration's Task List provides the capability for VA staff to view a listing of notes they have written but not yet signed.



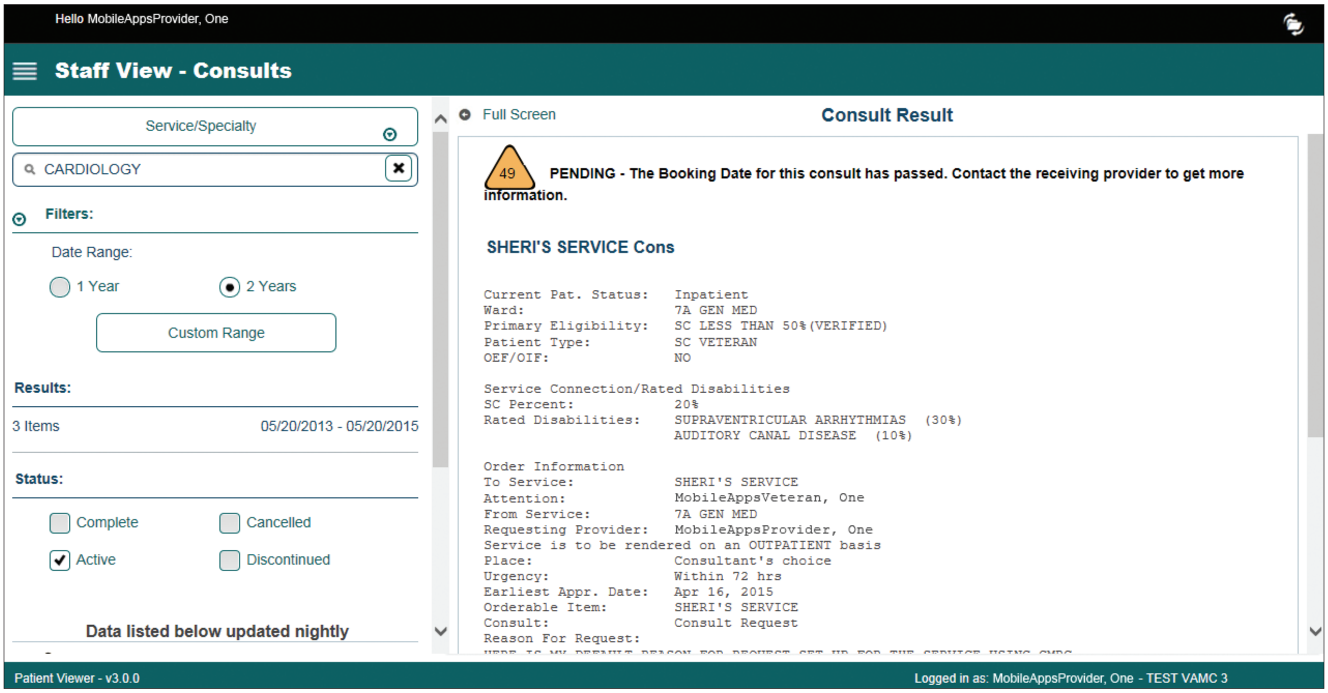
Viewing your task list

- Tap the menu (four line icon in upper left corner) > A slide-out menu will appear > Tap **Task List** > The number in parentheses next to Notes to Sign shows how many notes you have started but not yet signed. You can sort by the following:
- Date – Tap **Date** to sort by either ascending or descending.
- Patient Last Name – Tap **Patient Name** to sort by patient's last name either ascending or descending.
- Note Title - Tap **Title** to sort by the title of the note alphabetically.

Tap the note you would like to view or finish > The note will open up in the Progress Note section in Patient Record View > Finish the note as described in the Notes section of this document. **NOTE:** If your notes require a co-signer, you cannot use the app to write and sign notes as there is no co-signature capability in this version of the app.

Staff View - Consults

The consults section in Staff View allows you to view a list of consults filtered by service/specialty or a list of all the consults you have entered.



Viewing your Staff View - Consults

Tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Staff View - Consults** > Narrow down the results by using the Filters:

- From Me – The filter will default to Service/Specialty > To view only consults you have created, tap the **Service/ Specialty** bar at the top of the left pane of your screen > From the drop-down menu that appears, tap **From Me**.
- Service or Specialty – The filter will default to Service/Specialty > If you are viewing consults you have created and would like to view all consults from a particular Service/Specialty, tap **From Me** > From the drop-down menu, tap **Service/ Specialty** > Tap the **Search Specialties** bar, and enter at least two letters for the topic you would like to search > A drop-down list will appear > Tap the service or specialty from the drop-down list.
- Date Range – Tap the circle next to 1 Year, 2 Years, or tap **Custom Range**. If you choose to customize a date range, a pop-up Date Range box will appear > Tap the date next to Start Date and End Date. Enter the date in the form MM/DD/YYYY or tap the date from the pop-up Calendar that appears > Tap **Apply** to set the range and close the Date Range box.
  NOTE: The customized date range cannot exceed six years.
- Status – Tap the checkboxes (e.g., Scheduled, Pending).

The number of results that match your specifications will appear under Results at the bottom of the left pane of your screen > The list will also give details on if the consult is pending or scheduled, and a yellow triangle next to the consult means it is overdue > Tap on a specific consult you would like to view > The document's details will appear under the Consult Result heading in the right pane of your screen.

Help and Additional Information

Additional Training Materials for the Patient Viewer App

The Patient Viewer App has built-in User Guides to help explain the app's features. From either the Patient Record or Staff View, tap the four-line menu icon in the upper left corner of the screen, and tap **About** from the slide-out menu that appears. A pop-up About window will appear that provides an overview of the app and explanation about its features. Tap **Additional Information**, and a built-in User Guide will appear allowing you to view additional information about each category. In addition to the user guides built into the app, more resources, such as a Quick Start Guide, Slideshow and FAQs, can be found on ***mobile.va.gov/appstore***, and search for the app to access the resources.

Help Desk Information

If you need assistance with the Patient Viewer App, dial **1-844-482-6624** to speak with a VA representative. The Help Desk is open weekdays from 7 a.m. to 7 p.m. CT. For TTY assistance, dial 711.

Emergencies

If you feel that your information may have been compromised, contact your local VA facility to obtain the contact information from your Privacy Officer. To locate your local VA facility, visit VA's Facility Locator: ***http://www.va.gov/directory/ guide/home.asp?isflash=1***. Note that you should never use this app in an emergency situation. If you encounter an emergency, call your local medical center or dial 911.

Appendices

Appendix #1: Project References

This app was developed according to an approved concept paper. The app was tested in VA's secure mobile app Software Quality Assurance environment to ensure optimal functionality. Subject matter experts who served in the Patient Viewer App's creation are: Dr. Neil Evans, Dr. Deyne Bentt, Dr. Sue Woods, Dr. Shaman Singh, et al.

Appendix #2: Glossary

App – An application, or software program, that can be accessed through a website or mobile device and is designed to fulfill a particular purpose.

CPRS (Computerized Patient Record System) – A Veterans Health Information Systems and Technology Architecture (VistA) computer application. CPRS enables you to enter, review, and continuously update all the information connected with any patient. With CPRS, you can order lab tests, medications, diets, radiology tests and procedures, record a patient's allergies or adverse reactions to medications, request and track consults, enter progress notes, diagnoses, and treatments for each encounter and enter discharge summaries. In addition, CPRS supports clinical decision-making and enables you to review and analyze patient data.

VA – Department of Veterans Affairs.

VA Mobile Health – An initiative that aims to improve Veterans' health by providing technologies to expand care beyond the traditional office visit and that includes the creation of secure mobile apps to leverage the popularity of wireless technologies to support Veterans, Caregivers and VA care teams [More at: mobile.va.gov].

VistA (Veterans Health Information Systems and Technology Architecture) – VA's computerized patient record system.