U.S. Department of Veterans Affairs
Veterans Health Administration
Office of Connected Care

Secure Messaging for Researchers with Limited Experience Using Secure Messaging

VA Research Team Webinar

March 2018

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WELCOME!

- Audio has been placed in listen only mode

- Please use the chat window to ask questions

- Download this presentation from the link to today’s Cyberseminar

Upon completion of this session, participants will be able to:

- Describe My Health***e***Vet (MHV) and Secure Messaging
- Explain how Secure Messaging can be used by VA Researchers
- State why Secure Messaging can't be used for Research Recruitment
- Explain the requirements to use Secure Messaging to communicate with consented VA subjects
- Understand the decision making process for using Secure Messaging for research
- Describe the format for naming a Secure Messaging Triage Group for a specific study
- List the steps to use Secure Messaging by VA researchers for an approved VA study

Upon completion of this session, participants will also be able to:

- Explain how to ensure messages from subjects in the VA study are received
- Describe how VA study subjects can register for My Health***e***Vet
- List considerations for instructions for Veterans for the use of Secure Messaging with the study team
- Describe the steps to handle a Secure Message received in error for healthcare team
- List the Business Rules for timeliness of response to a Veteran Secure Message
- Explain the process to handle complaints sent through Secure Messaging
- Explain how to document communication with VA research subjects

Secure Messaging for Researchers is:

- an easy-to-use online messaging system available through My Health***e***Vet for VA Patients and their VA healthcare teams
- a valuable tool that can be used for communicating with consented VA study subjects

Target audience for this presentation:

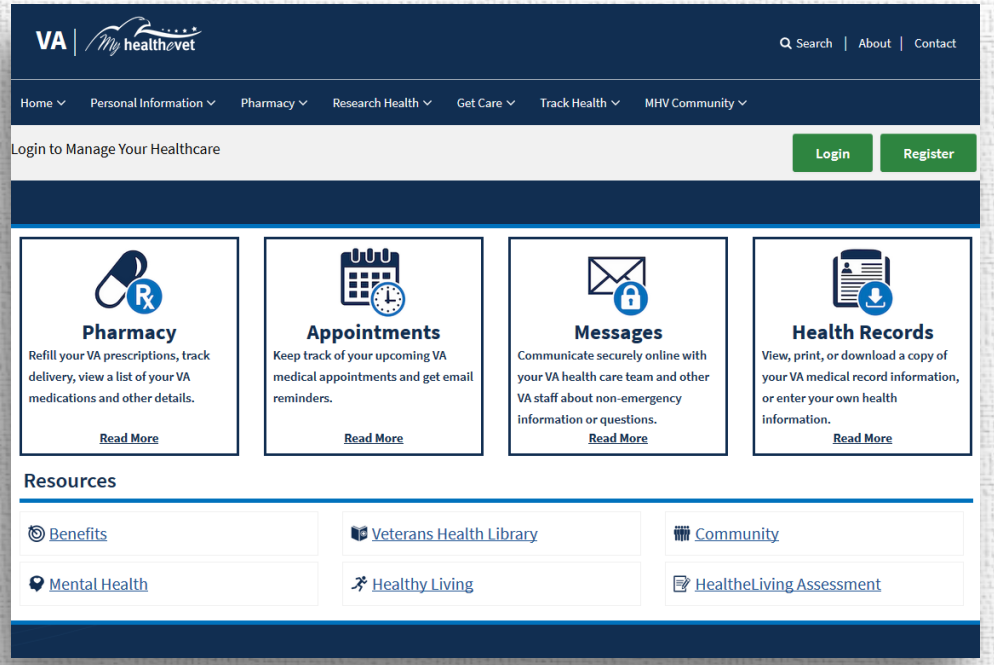
- VA Researchers
- VA research team members

BENEFITS OF USING SECURE MESSAGING TO CONDUCT RESEARCH

- Convenient for both VA study subjects and Researchers
- Confidential and secure
- Subjects can respond anytime
- Fast way to send group information by using distribution list
- Easy to add to health record when appropriate

OVERVIEW OF MY HEALTHeVET?

- Online portal for Veterans to:
  - ❑ Improve access to services
  - ❑ Enhance health literacy
  - ❑ Improve communication
  - ❑ Foster integrated care coordination
  - ❑ Enhance satisfaction
- Subjects can access My Health*e*Vet at: https://www.myhealth.va.gov



My Health*e*Vet allows Users or Enrollees to:

- Self-enter and print their health information:
  - ❑ Personal information (contacts, providers, insurance, etc.)
  - ❑ Personal, family and military health history
  - ❑ Tracking tools (blood sugar, blood pressure, weight, etc.)
  - ❑ Medications (over-the-counter drugs, herbals, etc.)
  - ❑ Allergies, immunizations and medical events
  - ❑ Food and activity journals
- Conduct a Health*e*Living Assessment

My Health*e*Vet allows Veterans* with an Advanced Ⓐ or Premium Ⓟ My Health*e*Vet account to:

- Refill their VA prescriptions
- Review their medication history and maintain their My Complete Medications list
- Track their VA Appointments and access VA Online Scheduling Ⓟ
- View their Allergies, Immunizations, Lab test results Ⓟ
- View their Department of Defense (DoD) Military Service information Ⓟ
- Use Secure Messaging Ⓟ
- Use VA Blue Button: Download My Data to view or output their Health Summary Ⓟ

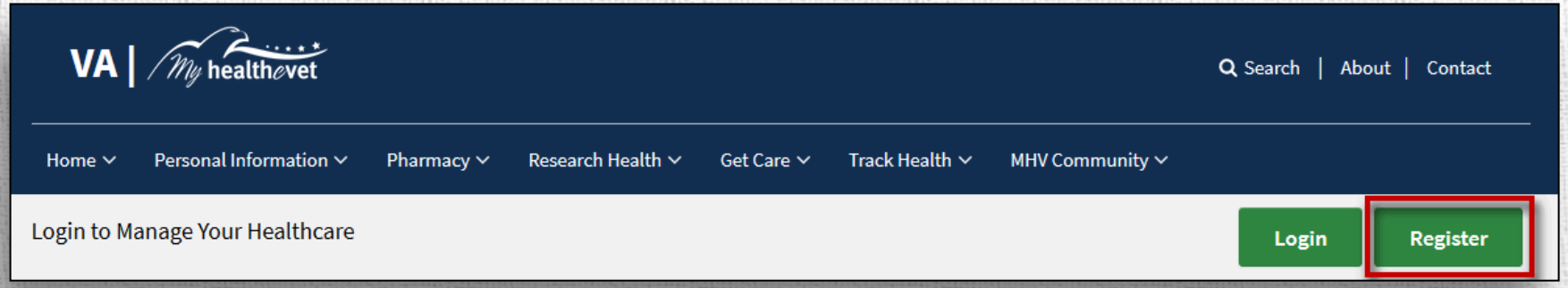
*non-Veteran's enrolled in a research study can use Secure Messaging

TYPES OF MY HEALTHeVET ACCESS

- Account Types:
  - Basic (B) - Anyone can register for a Basic account
  - Advanced (A) - Veterans who are VA Patients and Research Patients
  - Premium (P) - Veterans who are VA Patients and Research Patients that have been entered into the Master Patient Index and authenticated
- Only Premium account holders can access Secure Messaging
- The account type displays next to the user's name after logging in:

To Register for My Health*e*Vet:

1. Have the user go to https://www.myhealth.va.gov
2. Select the **Register** button

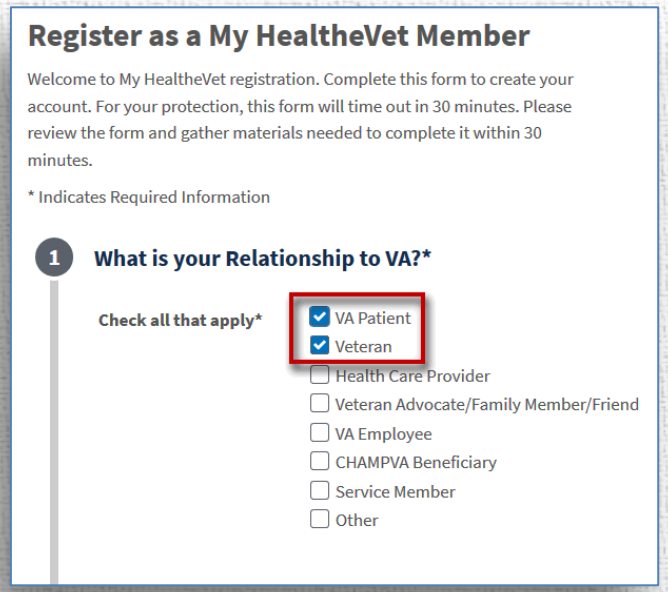


3. Complete the Registration form

a. If user is a Veteran receiving VA health care, please ensure they select "**VA Patient**" and "**Veteran**" under the Relationship to VA section

b. If user is a non-Veteran research participant, they must select "**VA Patient**"

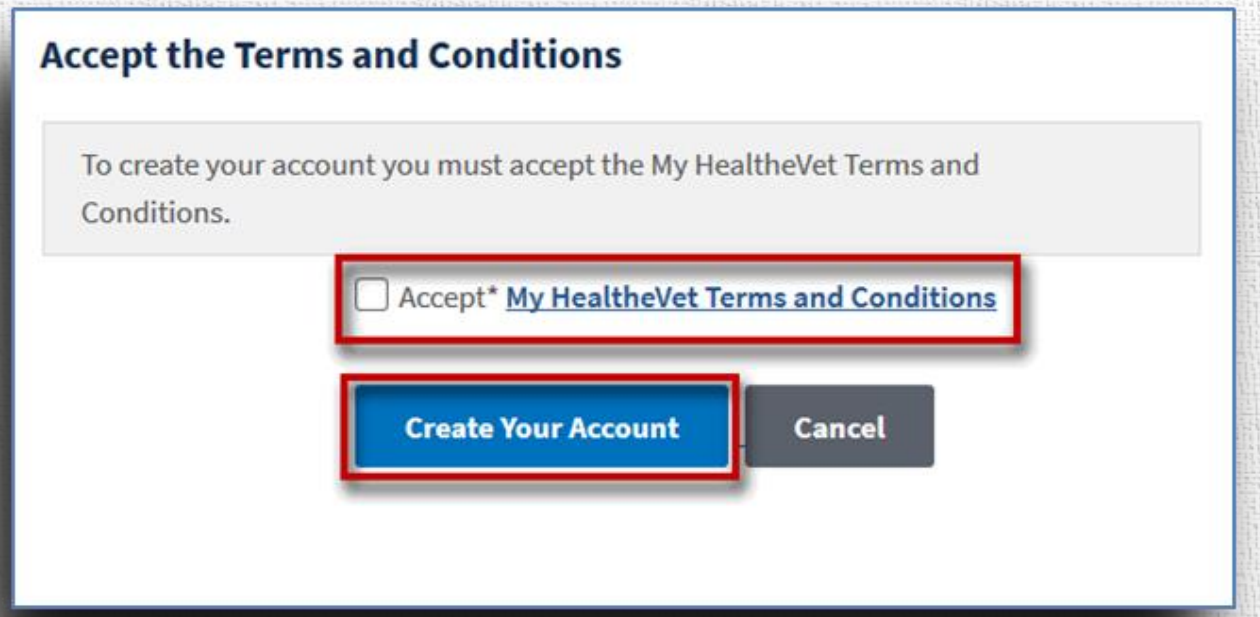
1. Secure Messaging requires the user to be a VA Patient. When registering for My Health*e*Vet, a non-Veteran research participant needs to select "**VA Patient**". The participant must have a treatment facility that belongs to one of the VA Medical Centers. The MHV system will verify they are a VA Patient and if true, after completing give the non-Veteran an Advanced account.



WHAT TO DO IF USER IS NOT YET REGISTERED FOR MY HEALTH*e*VET VET (2 OF 2)

4. Accept the My Health*e*Vet Terms and Conditions
5. Select the **Create your Account** button

They will have an **Advanced** account



- **To access Secure Messaging, Subject must have a My Health*e*Vet Premium account**
- *Authentication* is a process by which VA verifies the Veteran's identity before allowing the Veteran access to all features of My Health***e***Vet, including Secure Messaging

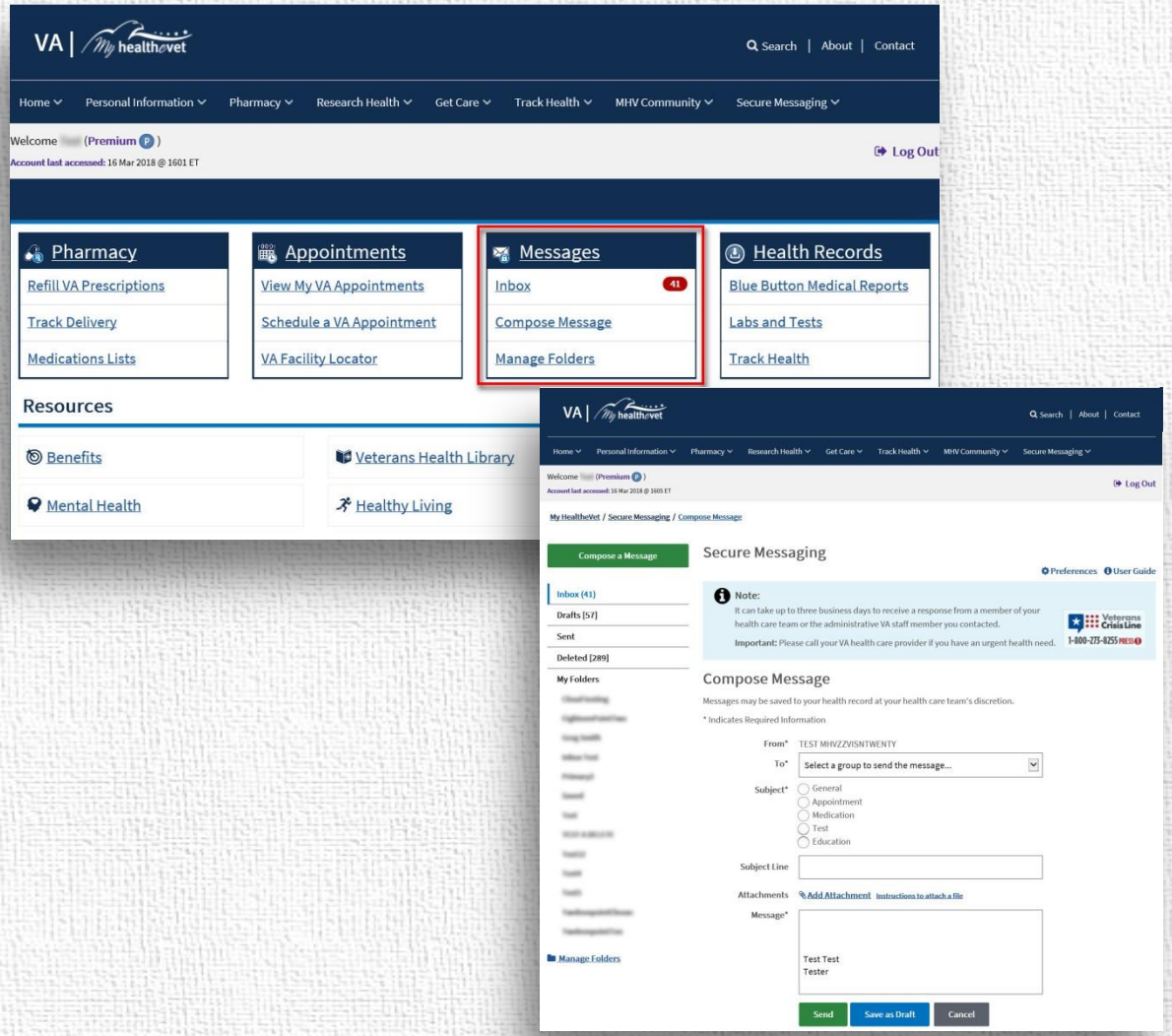
- **In-Person Authentication** requires going to a local VA facility, showing government issued photo ID and signing the VA Release of Information (ROI) form (10-534a-MHV) :
  - ❑ Paper form

    OR
  - ❑ Sign the Electronic iMed Consent can be using a signature pad
- Once authenticated, the existing My Health***e***Vet users are upgraded to Premium account status.

WAYS TO GET A PREMIUM ACCOUNT – ONLINE FOR USERS WITH DS LOGONS

- User with an Advanced My Health*e*Vet account logs in with DS Logon Level 2 credentials
  - ❑ Select **Upgrade Now** button that displays in the header
  - ❑ Account Upgrade Page displays
  - ❑ Check the box to certify they are the account owner
  - ❑ Select **Continue**
  - ❑ User must accept the My Health*e*Vet Terms and Conditions if haven't already
  - ❑ Is immediately upgraded to Premium account
- Please refer the user to the local VA Facility's My Health*e*Vet Coordinator if they have trouble upgrading

SECURE MESSAGING

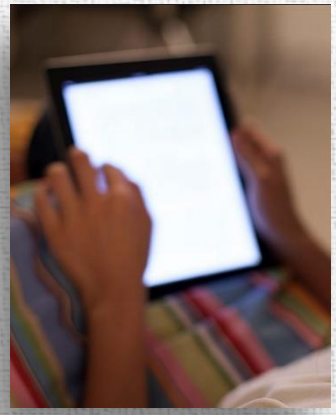


- Secure Messaging is a way for research subjects with a Premium account and VA Researchers to communicate securely with each other
- Recent updates make it easier to use!

ACCESS ON THE GO…..

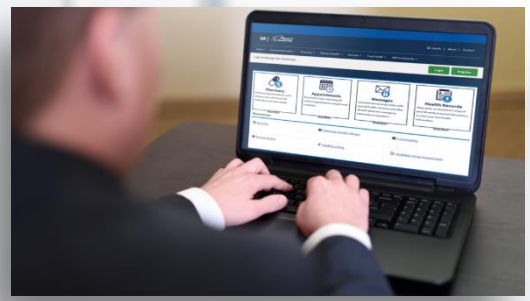
No matter where they are or what time of day, Users can respond to VA Researchers easily using Secure Messaging on their device of choice!

Smartphone



Tablet

Laptop/Desktop



To participate in Secure Messaging:

- Research Team Members must:
  - ❑ Be a Computerized Patient Record System (CPRS) User
  - ❑ Complete education and training on the use of Secure Messaging
  - ❑ Have account activated within the Secure Messaging Administrative Portal
  - ❑ Have Secure Messaging specified as method of communication for the study
  - ❑ Identify the triage method for incoming messages and set Preferences accordingly

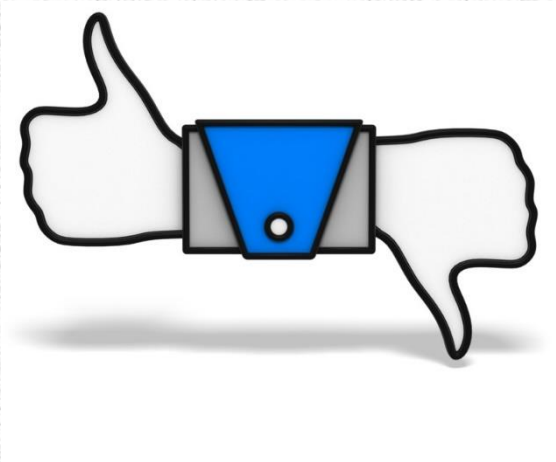
HOW VA RESEARCHERS CAN USE SECURE MESSAGING

- Secure Messaging can be used by VA Researchers to communicate securely with consented VA subjects, including sending VA sensitive information
- Any learning needs should be identified as part of standard operating procedures for the study before the study is submitted to the Institutional Review Board (IRB) of Record
- If the study requires access to Secure Messaging, this should be noted in the study eligibility criteria and outlined in the study protocol
- Secure Messaging **CANNOT** be used to **recruit** VA subjects or as any part of any **recruitment** activities in research

WHY CAN'T SECURE MESSAGING BE USED FOR RECRUITMENT?

Currently there is no option available for Secure Messaging users to "opt-in" or "opt-out" of receiving research recruitment messages.

- Secure Messaging users should have the ability to decide whether or not they wish to receive research recruitment messages or flyers
- Until that functionality is available, use of Secure Messaging to recruit research subjects is NOT permitted



INSTITUTIONAL REVIEW BOARD (IRB) REQUIREMENTS (1 0F 2)

- As part of an IRB's evaluation of non-exempt research, the IRB must apply the approval criteria in 38 CFR 16.111.
- These criteria include evaluation of communications provided to study participants in order to ensure that appropriate safeguards exist to protect the rights and welfare of research subjects and, when appropriate, that there are adequate provisions to protect the privacy of subjects and to maintain the confidentiality of data (38 CFR 16.111(a)(7)).
- When planning your study, consider that any research related notes saved in CPRS could be viewed by any VA staff with appropriate access to view the subject's VHA Electronic Health Record. These notes are available to the patient through the VA Blue Button.

INSTITUTIONAL REVIEW BOARD (IRB) REQUIREMENTS (2 OF 2)

- The specific types of communication that will be utilized in a particular research study must be specified in the study protocol, IRB application, or supplement to the IRB application as part of the IRB application process.
- Please note that applicable information security and privacy requirements must be adhered to in addition to IRB approval requirements for non-exempt human subjects research activities.
- If a VA researcher is planning to use templated messages that will be sent to research participants through Secure Messaging, the content of these messages must be reviewed by the IRB of Record for the research activity.

COMMUNICATION WITH RESEARCH SUBJECTS

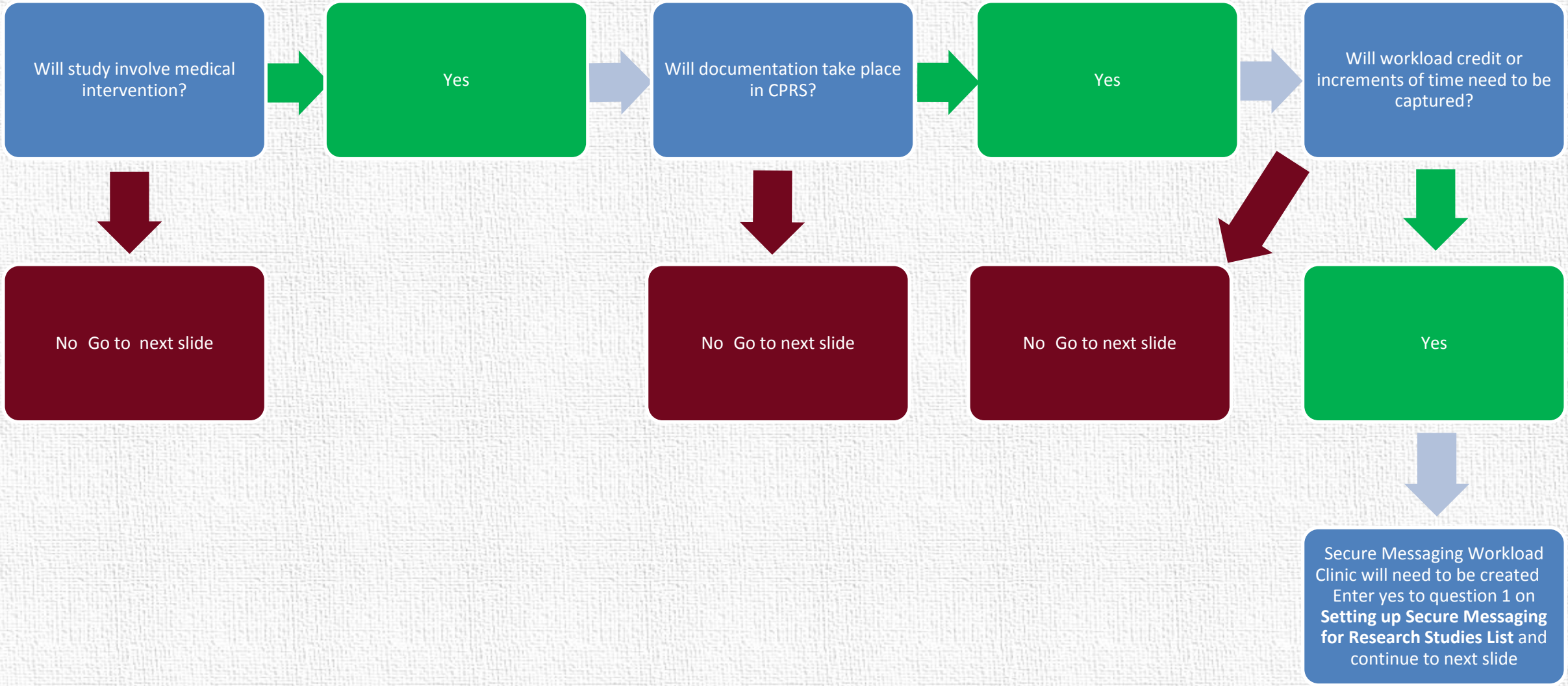
- A research activity may use multiple methods to communicate with research subjects:
  - ❑ U.S. mail
  - ❑ Secure Messaging
  - ❑ Email
  - ❑ Text Messaging
  - ❑ Telephone calls
  - ❑ Combination of above methods

- The study team will need to specify in the study the method of communication
- Alternate methods of communication should be available for subjects not wishing to use Secure Messaging (SM),unless use of SM is an inclusive criteria of the research study

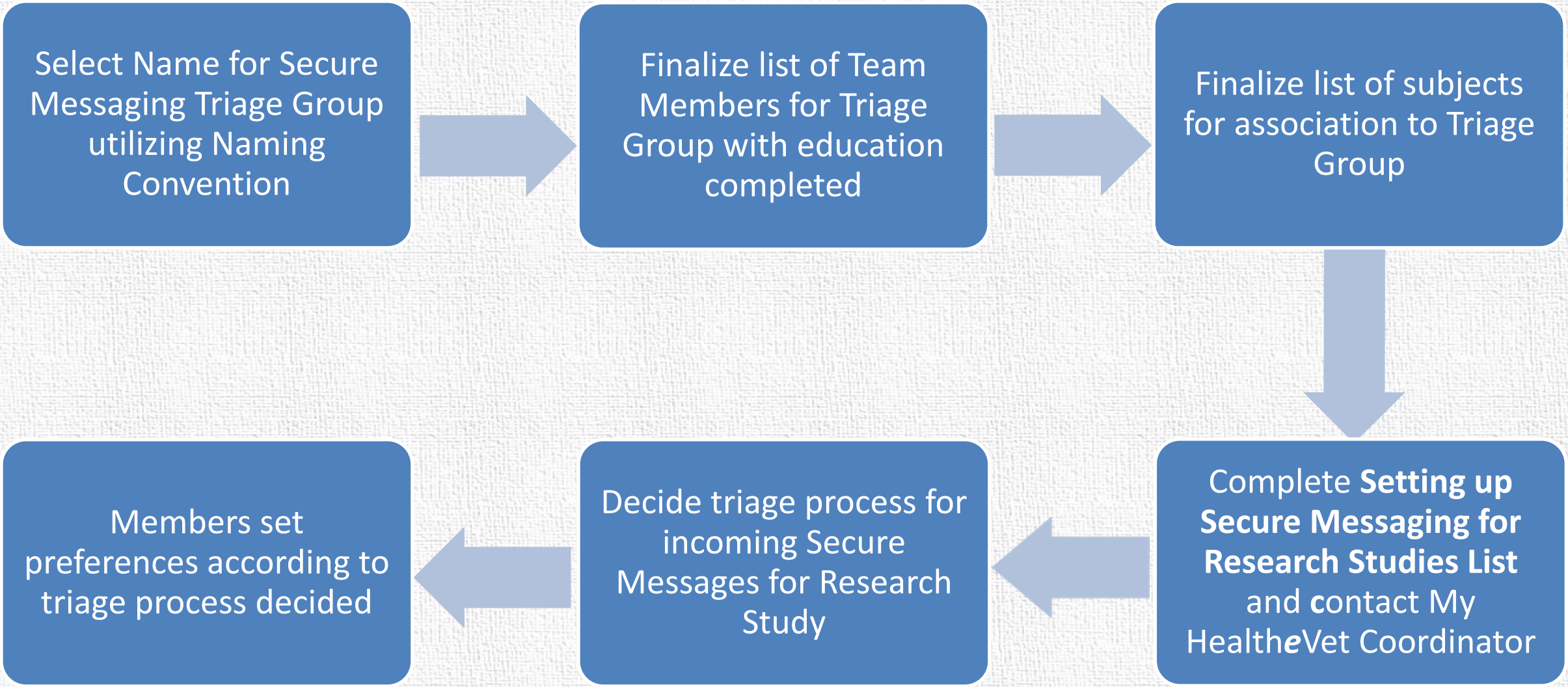
MY HEALTH*e*VET COORDINATOR OR SECURE MESSAGING ADMINISTRATOR

- The My Health*e*Vet Coordinator or Secure Messaging Administrator at your facility will help you with the set up of Secure Messaging for your Research Study
- A Decision Tree is provided to help you determine what is needed before you contact your facility Secure Messaging lead
- A checklist is also provided to complete with the needed information
- These resources are located on the My Health*e*Vet Product Site

DECISION TREE (1 OF 2)



DECISION TREE (2 OF 2)



SETTING UP SECURE MESSAGING FOR THE RESEARCH PROJECT

- A study-specific name must be used when My Health***e***Vet Secure Messaging is used for a research study
- This allows the subject to distinguish between Secure Messages that are related to his or her health care versus research related communication
- The My Health***e***Vet Coordinator at the local VA facility should be consulted when a VA researcher is ready to establish a Research Study Secure Messaging Triage Group

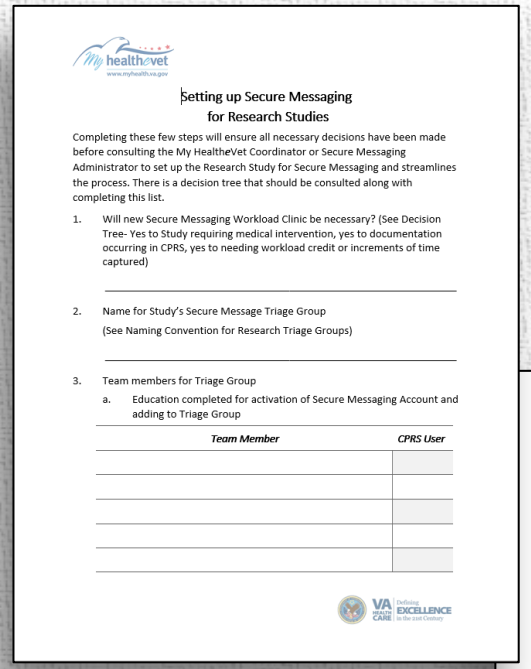
NAMING CONVENTION FOR RESEARCH STUDIES

- The character limit for the Secure Messaging Triage Group is 50 characters
- The study-specific name is created using a combination of four items:
  - ❑ Two standardized phrases and two study-specific phrases:
    - Three letters indicating the study site
    - The word “Research”
    - The study name or a short phrase that would allow identification of the message with the study
    - The word “STUDY_RES”
  - ❑ For example, if the Baltimore VA was a participating site in a multisite study called, “A comparison of Type II Diabetes and three modalities of activity to evaluate short-term and long-term effects on physical and psychological complications of Diabetes”, the study-specific name for the associated Secure Messaging Triage Group would be:

BAL-RESEARCH-DIABETES AND ACTIVITY-STUDY_RES

SETTING UP SECURE MESSAGING FOR RESEARCH STUDIES LIST

- A list has been created to help researchers compile and complete all the necessary information before they contact the My Health*e*Vet Coordinator to set up Secure Messaging for their Research Study
  - This list, **Setting Up Secure Messaging for Research Studies**, can be found on the My Health*e*Vet Product Site



Setting up Secure Messaging
for Research Studies

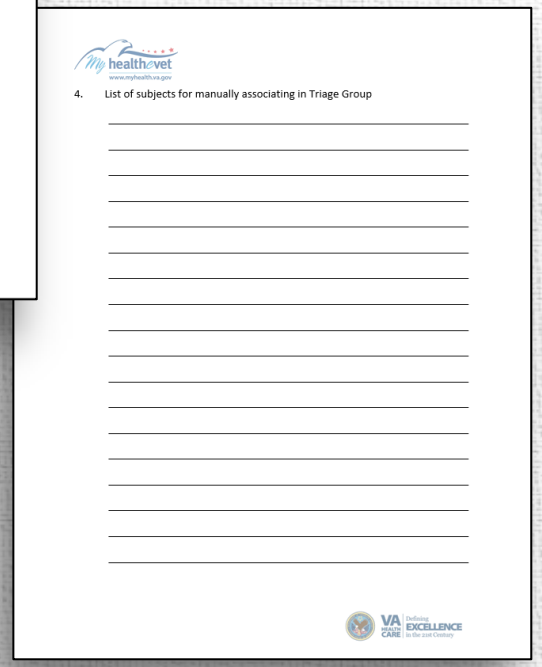
Completing these few steps will ensure all necessary decisions have been made before consulting the My HealtheVet Coordinator or Secure Messaging Administrator to set up the Research Study for Secure Messaging and streamlines the process. There is a decision tree that should be consulted along with completing this list.

1. Will new Secure Messaging Workload Clinic be necessary? (See Decision Tree- Yes to Study requiring medical intervention, yes to documentation occurring in CPRS, yes to needing workload credit or increments of time captured)

2. Name for Study's Secure Message Triage Group
   (See Naming Convention for Research Triage Groups)

3. Team members for Triage Group
   a. Education completed for activation of Secure Messaging Account and adding to Triage Group

Team Member	*CPRS User*



4. List of subjects for manually associating in Triage Group

BEFORE CONSULTING THE MY HEALTH*E*VET COORDINATOR

- Please have the following information ready to share with the My Health*e*Vet Coordinator:
  - ❑ Decision that new Secure Messaging Workload Clinic is needed if necessary (See Decision Tree)
  - ❑ Name for Study's Secure Message Triage Group (See Naming Convention)
  - ❑ Team members for Triage Group
  - ❑ List of subjects for manually associating in Triage Group
  - ❑ Setting Up Secure Messaging for Research Studies Check List completed

Preferences:

- Can belong to multiple Secure Messaging Triage Groups
- Cannot set different preferences for different Triage Groups
- Generally Primary and Specialty Care Triage Groups have an initial reviewer that then reassigns messages to appropriate team member
- VA Research team can also designate a team member to be the initial reviewer
  - Review and triage incoming study Secure Messages
  - Respond or reassign to other team members as needed

ENSURING YOU RECEIVE STUDY SECURE MESSAGES

- If you have an initial reviewer assigned for the study triage, set preferences for:
  - ❑ Message Notification set to "On Assignment"
  - ❑ Inbox View Preferences set to "Only Messages Assigned to me"

- If you do not have an initial reviewer assigned for the study triage **OR** if you are the initial reviewer, set preferences for :
  - ❑ Message Notification set to "Each Message"
  - ❑ Inbox View Preferences set to "See All Messages"

REVIEW OF TASKS TO COMPLETE WHEN SETTING UP SECURE MESSAGING FOR USE IN AN APPROVED STUDY

- Local My Health*e*Vet Coordinator consulted:
  - ❑ Secure Messaging Workload Clinic created (if required - see Decision Tree)
  - ❑ Triage Group created using study-specific name and specific naming convention
  - ❑ Research team members accounts activated within Secure Messaging Administrative Portal
  - ❑ Research team members added as group members
  - ❑ Subjects (users) associated with study
- Triage process for incoming Secure Messages identified
  - ❑ Team members have their individual preferences set for Outlook notifications

True?

False?

Secure Messaging can be used to recruit subjects for VA research studies.

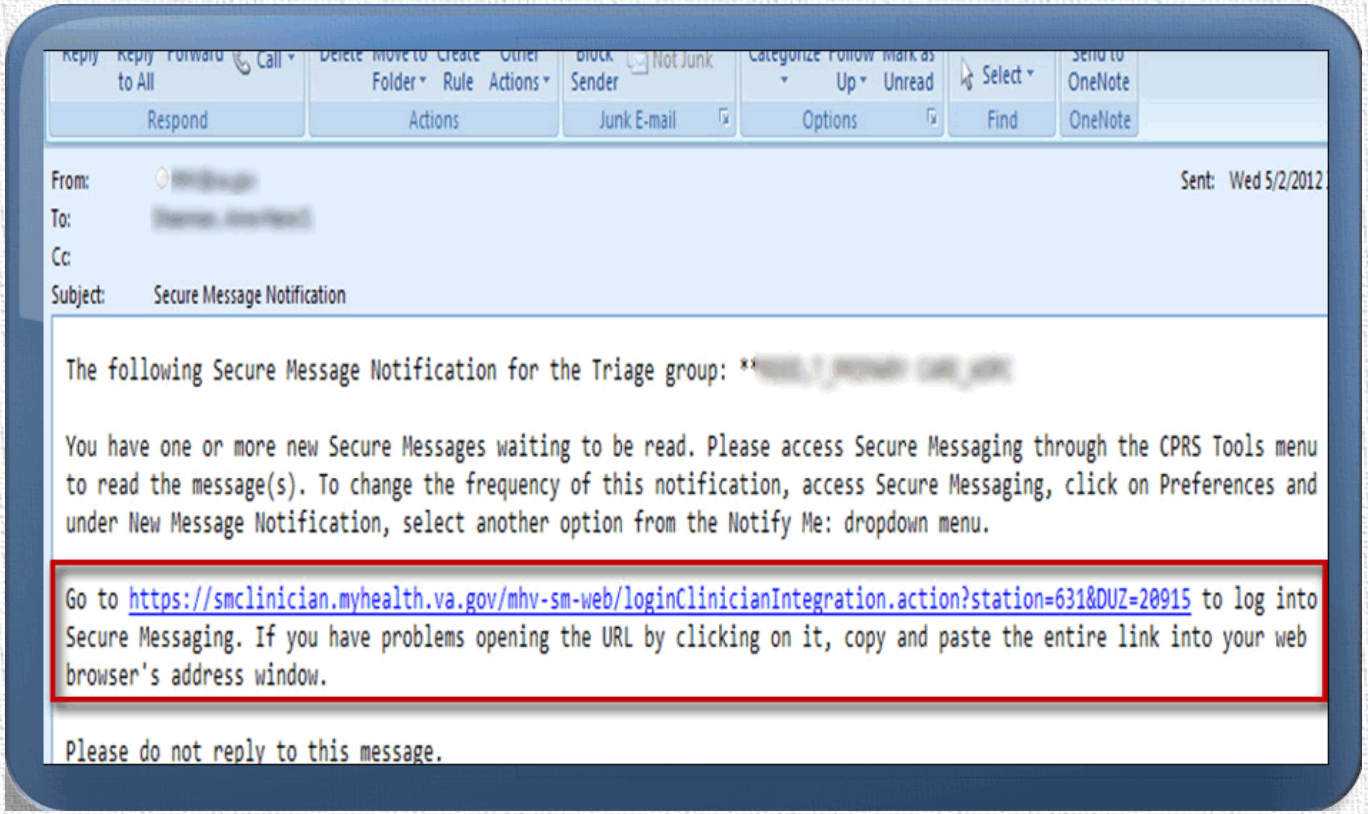
What steps should be completed, once the research study is approved, before using Secure Messaging with the study?

a. Triage Group created using study-specific name
b. Research team members added as group members
c. Subjects associated with Triage Group
d. Triage process for incoming messages identified
e. Team members' individual preferences set accordingly

Select as many as applicable

There are two ways to access Secure Messaging.

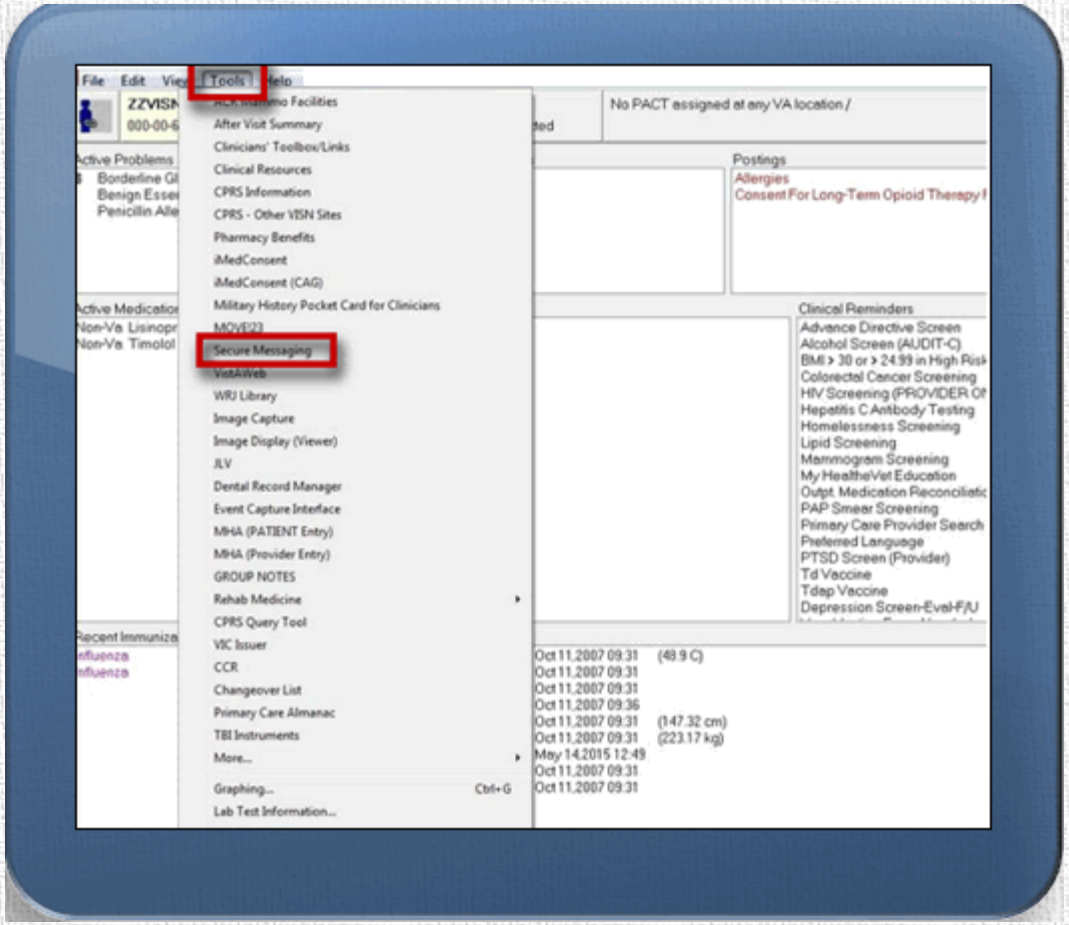
1. Select the **hyperlink** from within a Secure Message Outlook email.



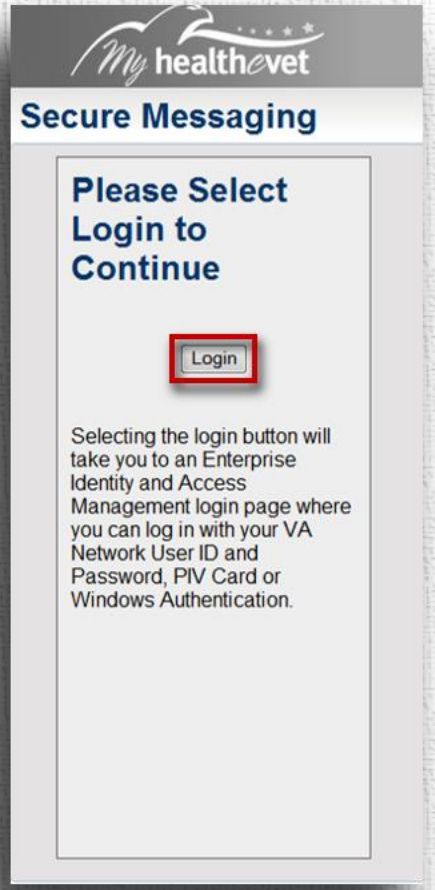
2. Select **Secure Messaging** from the tools menu in CPRS.*

NOTE: Secure Messaging is a separate program from Outlook, CPRS and VistA.

*If Secure Messaging is not available in the CPRS Tools menu, contact your facility's My Health*e*Vet Coordinator



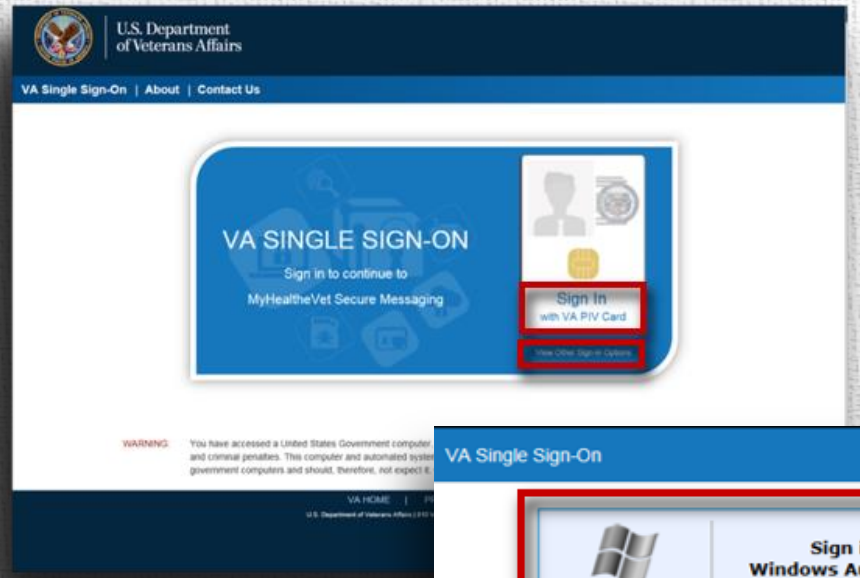
1. Select **Login**

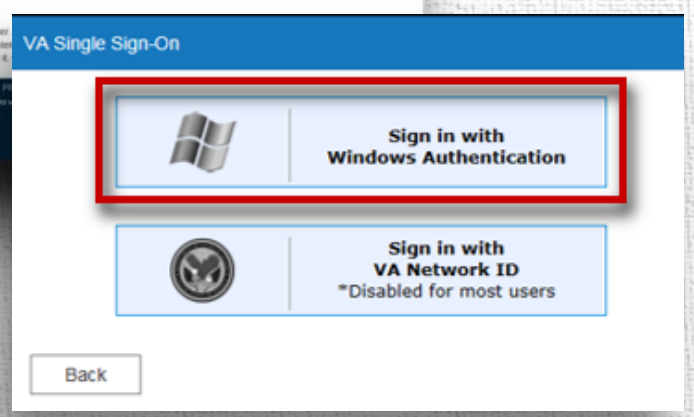


2. Select **Sign-in with VA PIV Card**
   a. Enter your **corresponding PIN**

OR

3. Select **View Other Sign-in Options**
   a. Select **Sign in with Windows Authentication(recommended)** (no VA Network User ID or Password is needed*)

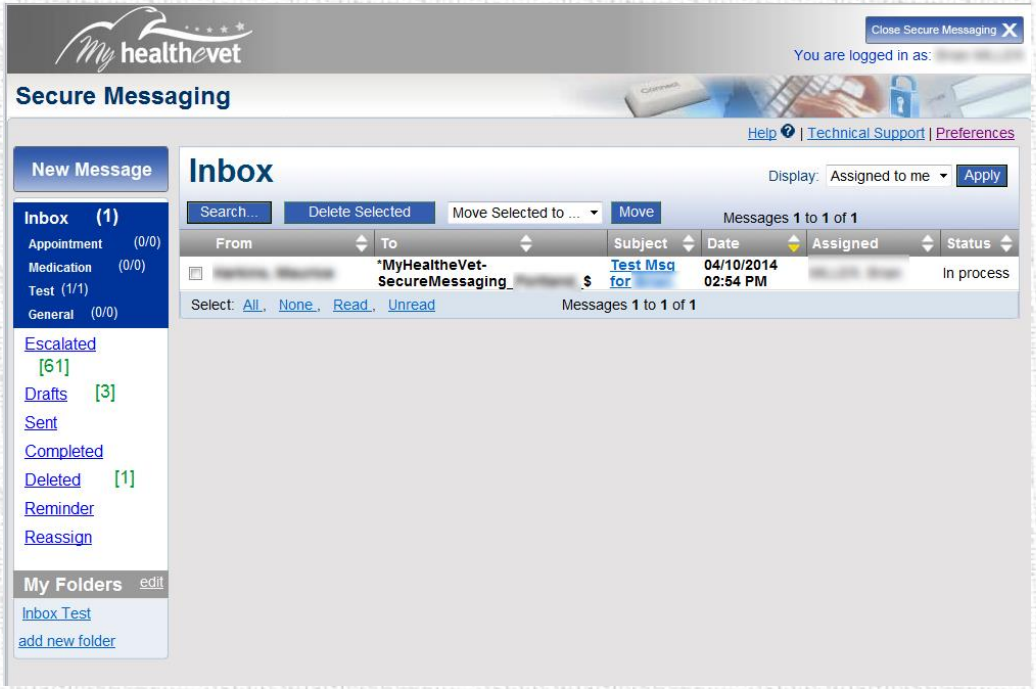




***NOTE:** Mobile devices may require User ID and Password

SECURE MESSAGING INBOX (1 OF 2)

- Upon log in, Secure Messaging opens to the Inbox.
- The Inbox contains Secure Messages received by the team(s) and not yet marked Complete

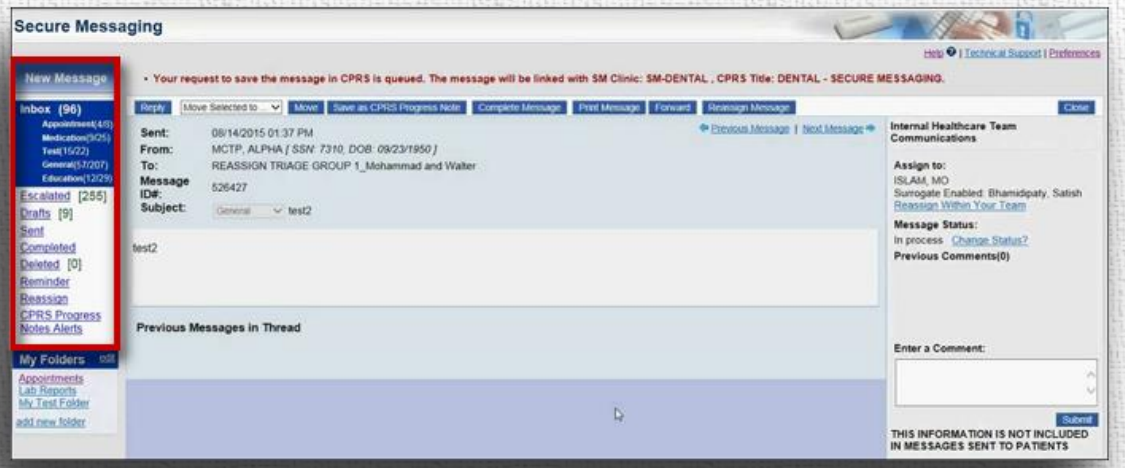


SECURE MESSAGING INBOX (2 OF 2)

- From the Inbox users can:
  - Create a new Secure Message by selecting the “New Message” button on the left side of the screen
  - Open various folders located under the “New Message” button
  - Create personal folders within their Secure Messaging account

Secure Messaging Terminology:

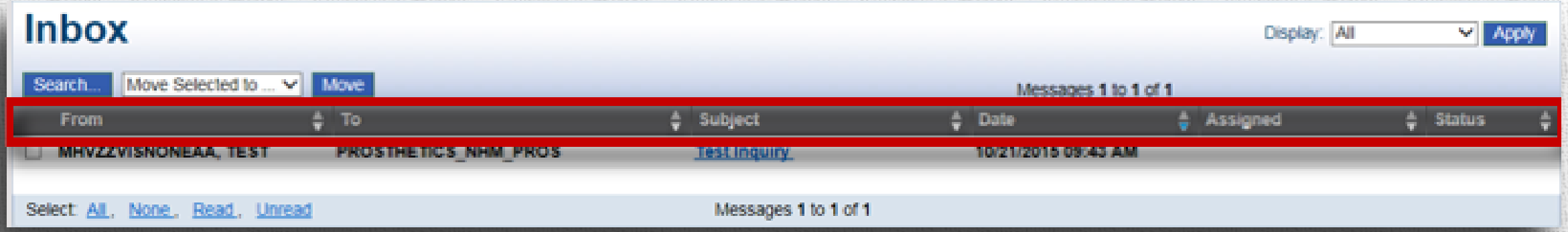
- **New Message Button**: Create and send a new message
- **Inbox**: All active messages, can also be selected to refresh screen
- **Escalated**: Messages that have exceeded the ***three (3) business day*** completion rule and still need to be completed
- **Drafts**: Messages saved as a draft, whether AutoSaved or manually saved



NAVIGATE THE INBOX (2 OF 2)

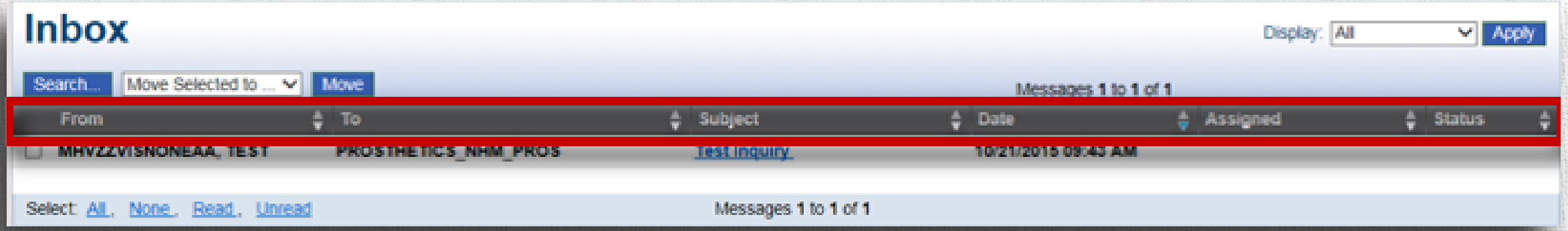
- **Sent**: Only messages YOU sent
- **Completed**: All messages the TEAM completes
- **Deleted**: This folder is no longer functional
- **Reminder**: If a reminder is set, the message will appear here
- **Reassign**: Message history can be tracked here
- **CPRS Progress Notes Alerts**: Messages that failed to save to CPRS with error explanation
- **My Folders**: Personal folders created within your Secure Messaging account

CONTENTS OF SECURE MESSAGES (1 OF 2)



- Each Secure Message will list:
  - ❑ From: Who the Secure Message is from
  - ❑ To: Secure Messaging Triage Group that this Secure Message is associated with
  - ❑ Subject: The subject of the Secure Message
  - ❑ Date: The date and time (Eastern Time) of the Secure Message

CONTENTS OF SECURE MESSAGES (2 OF 2)



- Each Secure Message will also list:
  - ❑ Assigned: To whom the Secure Message is Assigned action

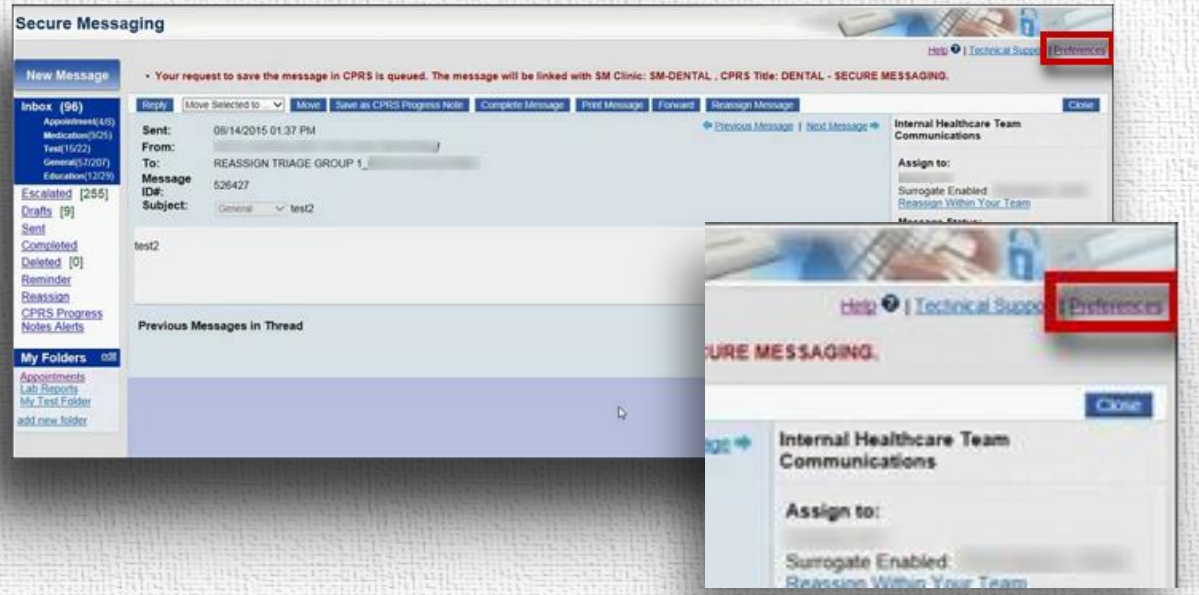
    (if 'Assigned' is blank, the message has not been opened by a team member)
  - ❑ Status: The status of the Secure Message

    (if 'Assigned' it will show 'In Process')

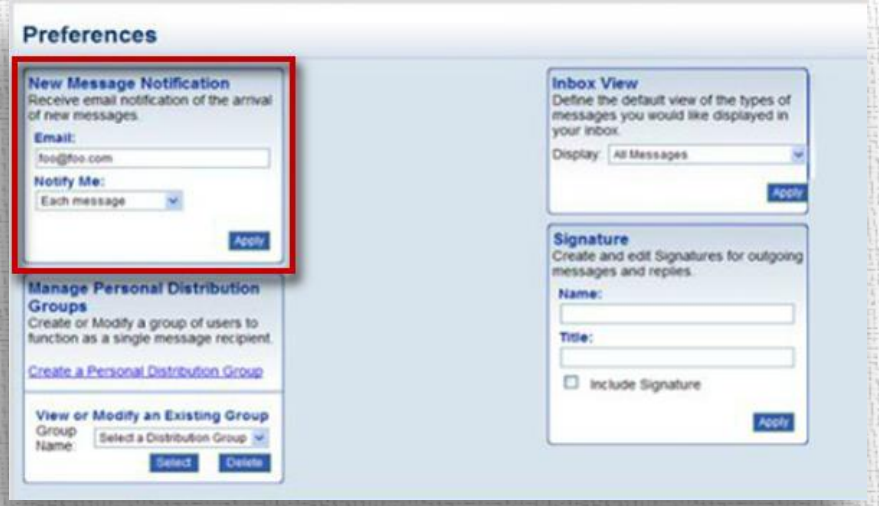
You must set the various preferences for your Secure Messaging account. It is very important that you set your Preferences correctly so you do not miss any messages. It is **RECOMMENDED** to set them the first time you log in to Secure Messaging.

To set Preferences:

1. Select **Preferences** from any screen within Secure Messaging



You will receive a notification alerting you when you receive a new Secure Message. There is a link within the notification that you can select to go to the Secure Message.



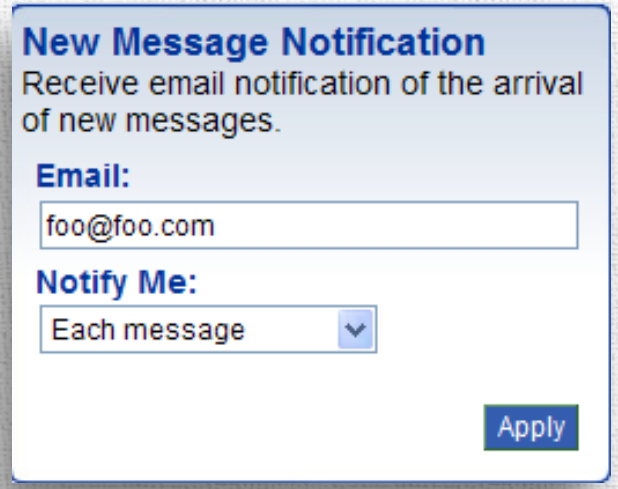
1. Under New Message Notification, enter the **email address** where you want to receive the notifications.
   a. The New Message Notification defaults to your VA email address used in Outlook.
   b. You can make changes to the email address but it cannot be left blank.

NEW MESSAGE NOTIFICATION – NOTIFY ME

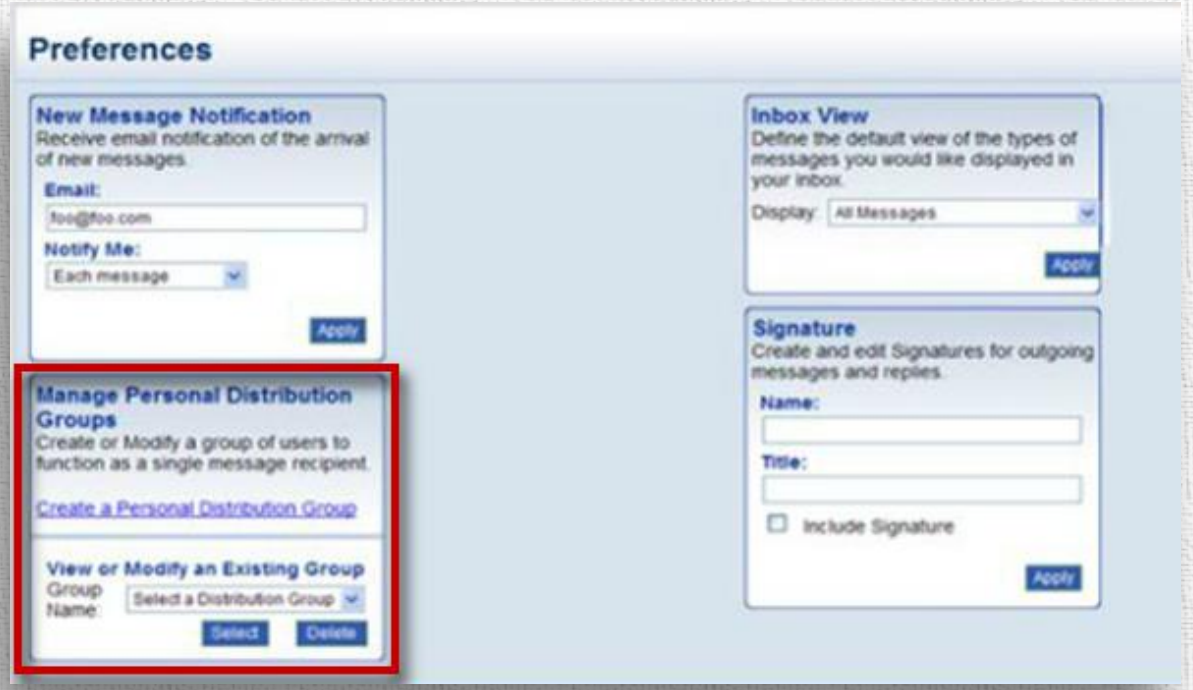
You decide when you receive notifications by selecting from the dropdown menu under Notify Me:

- Options:
  - ❑ Each message
  - ❑ Once daily (not recommended)
  - ❑ On assignment to me

1. Select **one of the three options** from the dropdown menu under Notify Me
2. Select **Apply**



SECURE MESSAGING PREFERENCE OPTIONS
MANAGE PERSONAL DISTRIBUTION GROUPS

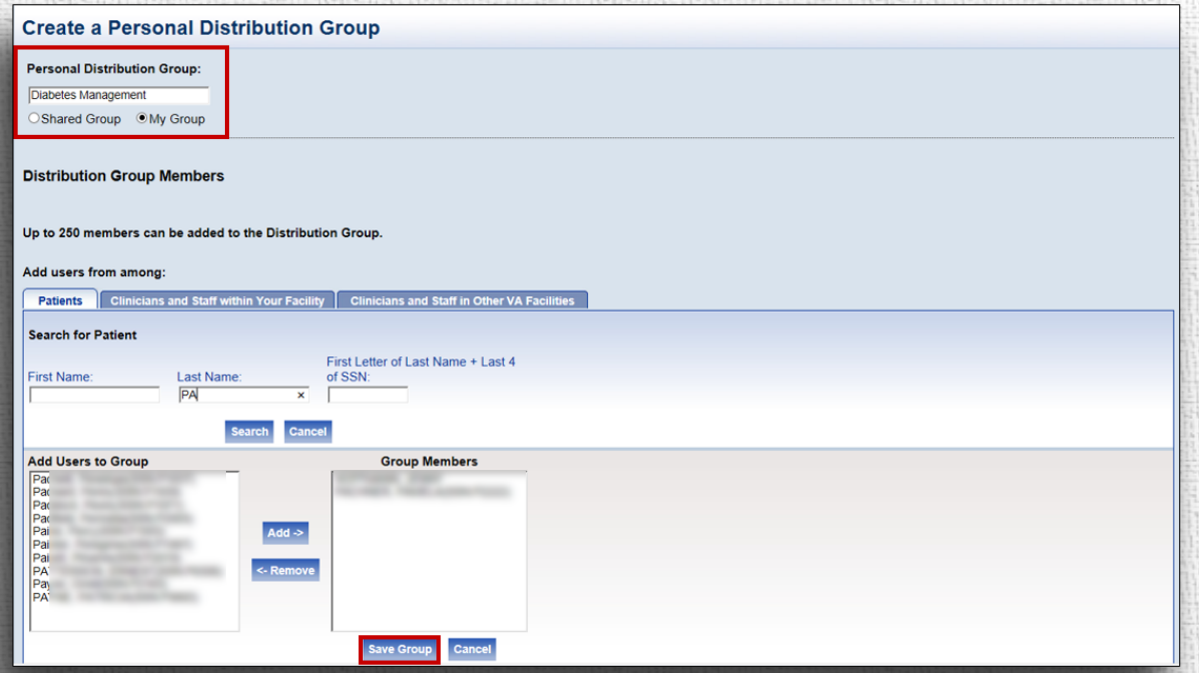


- You have the ability to create, view or modify personal Distribution Groups. You can communicate with a group all at once through the use of a Distribution Group.

1. Select **Create a Personal Distribution Group** under Manage Personal Distribution Groups

CREATE DISTRIBUTION GROUP (2 OF 2)

2. Enter name for Distribution Group
3. Select radio button in front of **My Group**
4. Select appropriate tab to search for members
5. Search for desired member(s)
6. Select **Add**
7. Select **Save Group**



SECURE MESSAGING PREFERENCE OPTIONS MODIFYING A DISTRIBUTION GROUP (1 OF 2)

If your group changes, you, as the creator or owner*, have the ability to modify your Distribution Group.

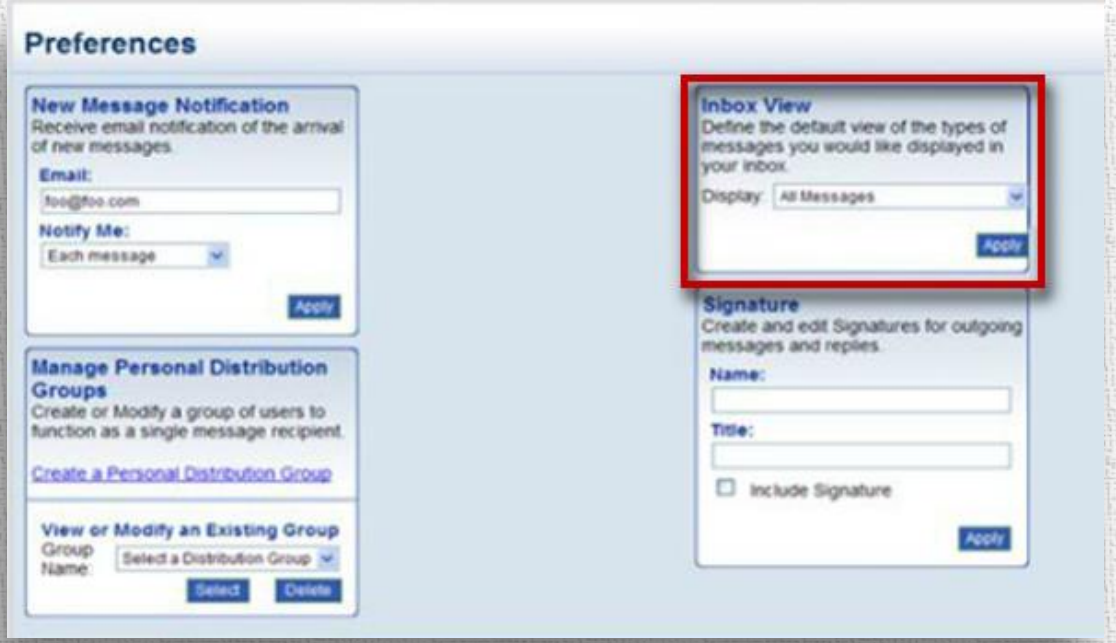
1. Under Manage Personal Distribution Groups, select **Group Name** from the dropdown menu and then choose **Select.**

***ONLY** the owner can make changes

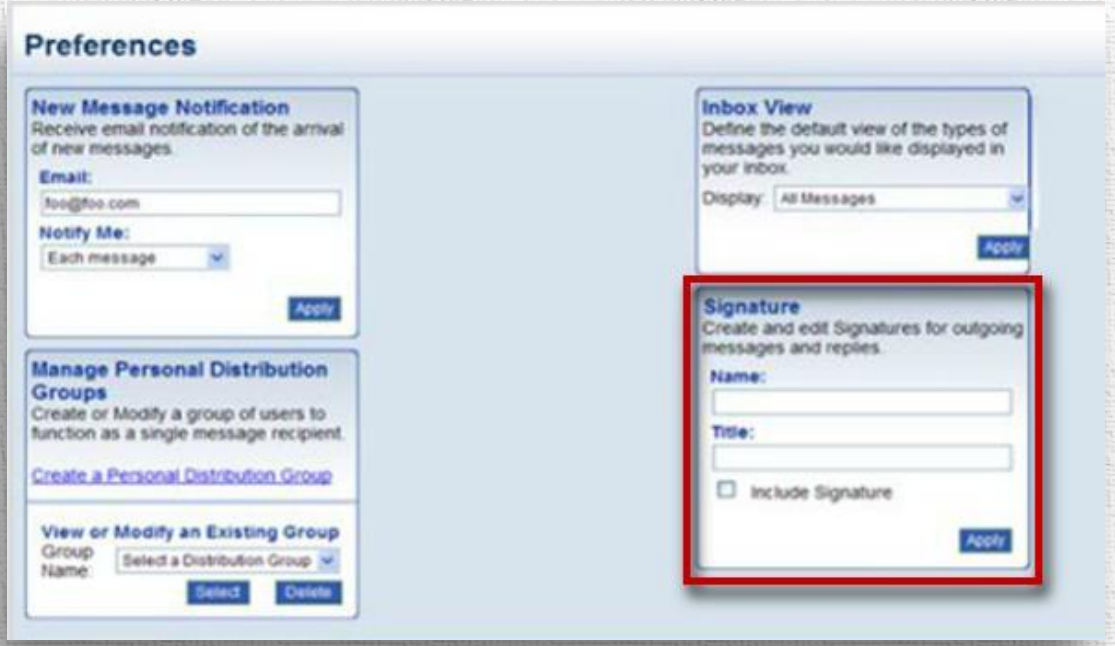
2. Select **Search for Users to Add to Group**
3. Search for new members and add to the Group Members list by selecting **Add**
4. Members to be removed from list can be selected from the right column under Group Members and selecting **Remove**
5. Select **Save Group**

You have the ability to set which messages you wish to display when you log into Secure Messaging.

1. Select the **option** desired from the dropdown menu next to Display under Inbox View
   a. All Messages
   b. Only Messages Assigned to Me
   c. Only Unassigned Messages
2. Select **Apply**

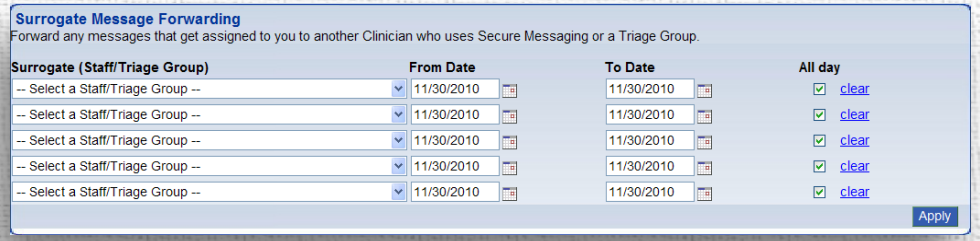


Set a signature that will be included in all outgoing Secure Messages.



1. Enter **name** as you wish it to appear in the signature block under Name in the Signature section.
2. Enter **title** as you wish it to appear in the signature block under Title
3. Select **check box** in front of include Signature
4. Select **Apply**

You have the ability to designate a surrogate to act in your place when you are unavailable to respond to Secure Messages.



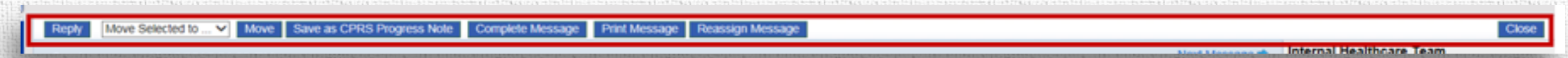
1. Select **Staff/Triage Group** to act as surrogate from the dropdown menu under Surrogate (Staff/Triage Group) in Surrogate Message Forwarding section.
2. Defaults to All Day. If the selected surrogate will only act for a specific time period for the specified day(s), select the **"All day" check box** (removes the check mark) – time options will become available
3. Enter start date (mm/dd/yyyy) or use calendar to select **Start Date** and **End Date**
4. Select **Apply**

- Designated Surrogate must make sure their Inbox View setting in Preferences is set to All Messages. Otherwise, they will not see the Secure Messages that have been forwarded to them!

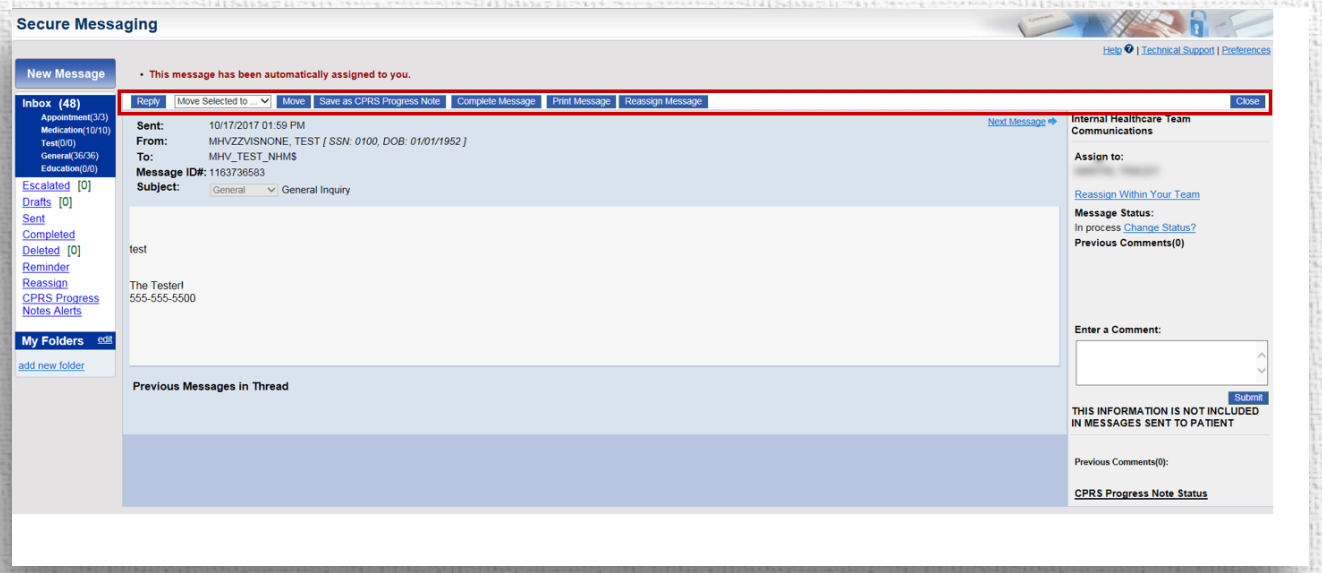
SECURE MESSAGING ACTIONS (1 OF 2)

Users have the ability to:

- Create a new message
- Reply to a Secure Message
- Move a Secure Message to a folder under My Folders
- Save a Secure Message as CPRS Progress Note
- Complete a Secure Message
- Print a Secure Message
- Reassign a Secure Message
- Close a Secure Message



SECURE MESSAGE ACTIONS (2 OF 2)



Users have the ability to:

- Triage a Secure Message and Reassign the message to:
  - ❑ A member of their Triage Group
  - ❑ A Triage Group within their facility
  - ❑ A Triage Group at an outside VA facility
- Reassign a Secure Message using the Internal Healthcare Team Communications box (right side of screen)

How to search for a recipient:

1. Select **New Message** from top of left column
2. **Select Search for a recipient** after To:

Important: Make sure you are sending the message from the Triage Group (Secure Messaging team) to which the patient is associated. **If you do not, the patient will not be able to reply to the message.**

SEARCH FOR PATIENT - SIMILAR TO CPRS

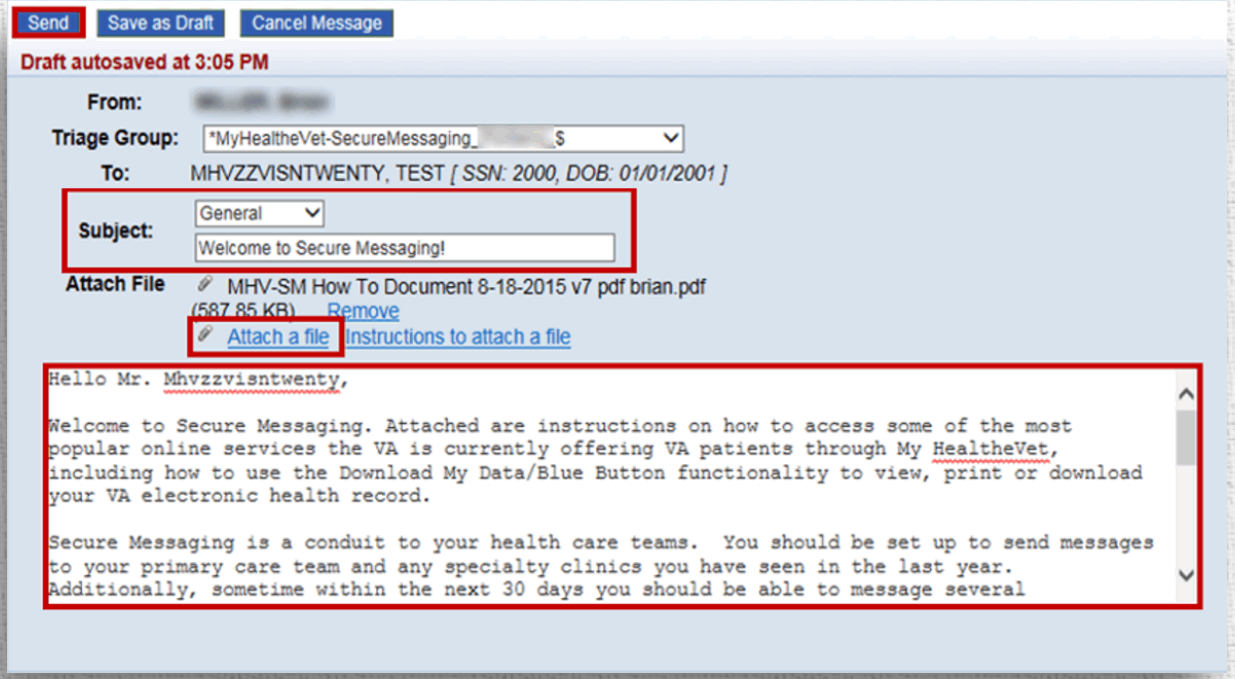
1. Enter Patient's first initial of last name with last 4 of Social Security Number (SSN) into **First Letter of Last Name + Last 4 of SSN** field
2. Select **Search**
3. When the patient's name appears in the "Select Recipient" field, highlight the name
4. Choose **Select** in order for the name and Recipient Information to show up in the "Select Recipient" field

IMPORTANT TIPS FOR SEARCHING (1 OF 2)

- Always include the first initial of the last name with the last 4 of SSN
  - If you only put in the last 4 of SSN, no results will show no matter what else you include. The two must go together.
- Searching by the last name field generates a list of patients and provides the last 4 of SSN and Date Of Birth (DOB) – beware of very common last names

IMPORTANT TIPS FOR SEARCHING (2 OF 2)

- Patient must have logged into Secure Messaging at least once before they can be found in a search
- If you cannot find the patient you wish to send a Secure Message to, make sure you have searched correctly



1. Select a **message topic** from the dropdown menu
2. Enter **message subject**
3. Enter **message**
   a. Internet links will not show up as hyperlinks while you are preparing the message but DO when they are opened by the recipient
4. If you wish to include a file, Select **Attach a file**

5. Proofread message
6. Verify recipient is correct
7. Review attachments
8. Select **Send**

Send | Save as Draft | Cancel Message

Draft autosaved at 3:05 PM

From:

Triage Group: *MyHealtheVet-SecureMessaging_ $

To: MHVZZVISNTWENTY, TEST [SSN: 2000, DOB: 01/01/2001]

Subject: General | Welcome to Secure Messaging!

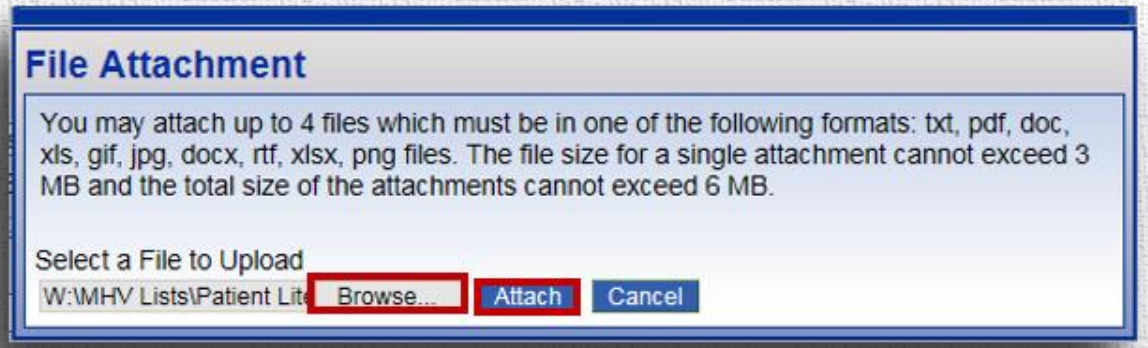
Attach File: MHV-SM How To Document 8-18-2015 v7 pdf brian.pdf (587.85 KB) Remove

Attach a file | Instructions to attach a file

Hello Mr. Mhvzzvisntwenty,

Welcome to Secure Messaging. Attached are instructions on how to access some of the most popular online services the VA is currently offering VA patients through My HealtheVet, including how to use the Download My Data/Blue Button functionality to view, print or download your VA electronic health record.

Secure Messaging is a conduit to your health care teams. You should be set up to send messages to your primary care team and any specialty clinics you have seen in the last year. Additionally, sometime within the next 30 days you should be able to message several

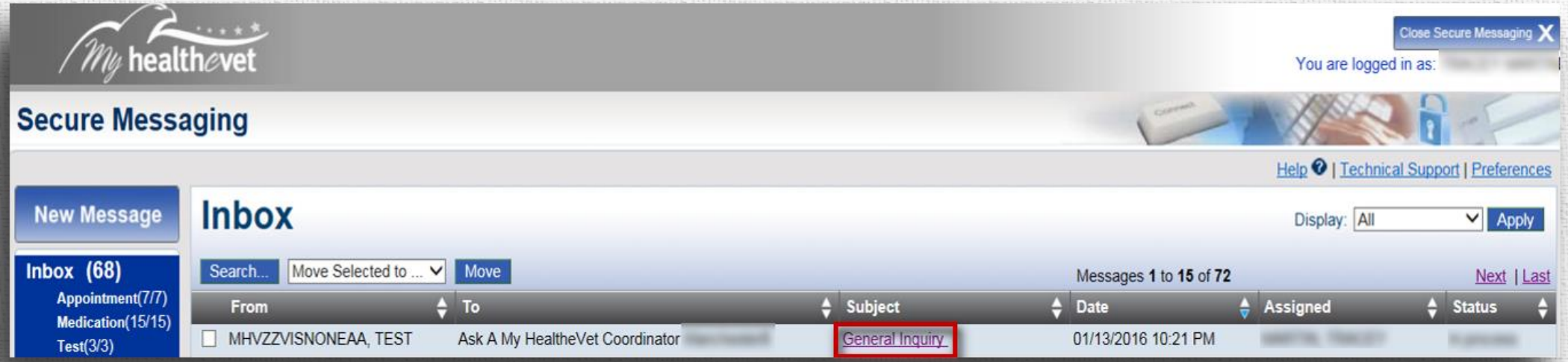


To include attachment(s):

1. Select **Browse**
2. Search for file you wish to attach
3. Double-select file you want to attach
4. Select **Attach**
   a. May attach up to 4 files
   b. Individual file size cannot exceed 3MB and total size of attachments cannot exceed 6MB
   c. Must be in: txt, pdf, doc, xls, gif, docx, rtf, xlsx or png format

- If an attachment is added to a Secure Message and the message goes into draft form, the attachment is dropped from the Secure Message
  - It is recommended to add the attachment to the message right before selecting the **Send** button
- The user can view Secure Messaging attachments once the message has been completed by selecting the Secure Message from the Completed folder
  - Secure Messages with attachments have a paperclip icon

To open a Secure Message from the Inbox, select the desired **hyperlink** under the "Subject" column.



- Attachments sent display as labeled by the sender

1. Select **hyperlink** to either open or view attachment
   a. Message displays to either open, save or cancel message
   b. Attachments cannot be saved directly to CPRS from Secure Messaging

To save attachment sent by patient:

- Can be directly saved to a VistA Imaging Import Folder and then indexed and saved to VistA Imaging (this is the preferred, paperless method)

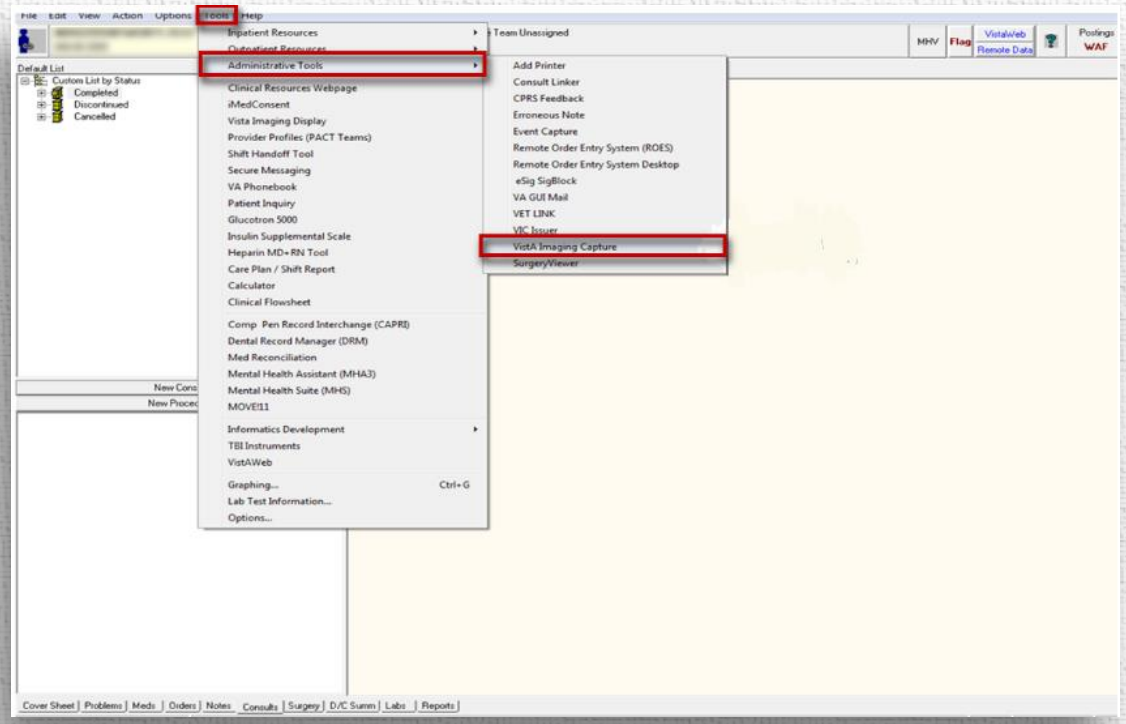
OR

- Can be printed and then captured to VistA Imaging using a flatbed scanner as is commonly done with outside medical records
  - ❑ Follow local process on scanning outside documents into the medical record

IMPORTANT INFORMATION ABOUT VIEWING ATTACHMENTS

- When saving attachments, follow your facility's process
- If you receive and open a PDF file, a message displays to inform the user that opening/downloading files creates a temporary file on the computer and the information in this file can be visible to other users on this computer
  - ❑ Select the **Agree** button to accept the risk prior to the file opening
  - ❑ If **Decline** is selected, the PDF file will not open

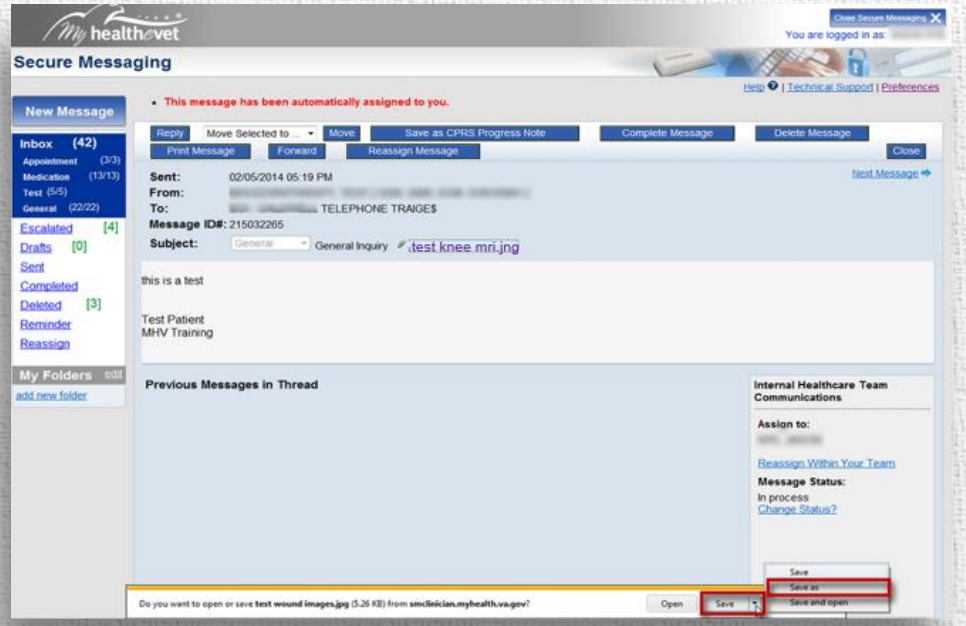
SAVING AN ATTACHMENT PAPERLESS (1 OF 6)



If you have access to save to a VistA Imaging Folder, you have the ability to save the attachment paperless:

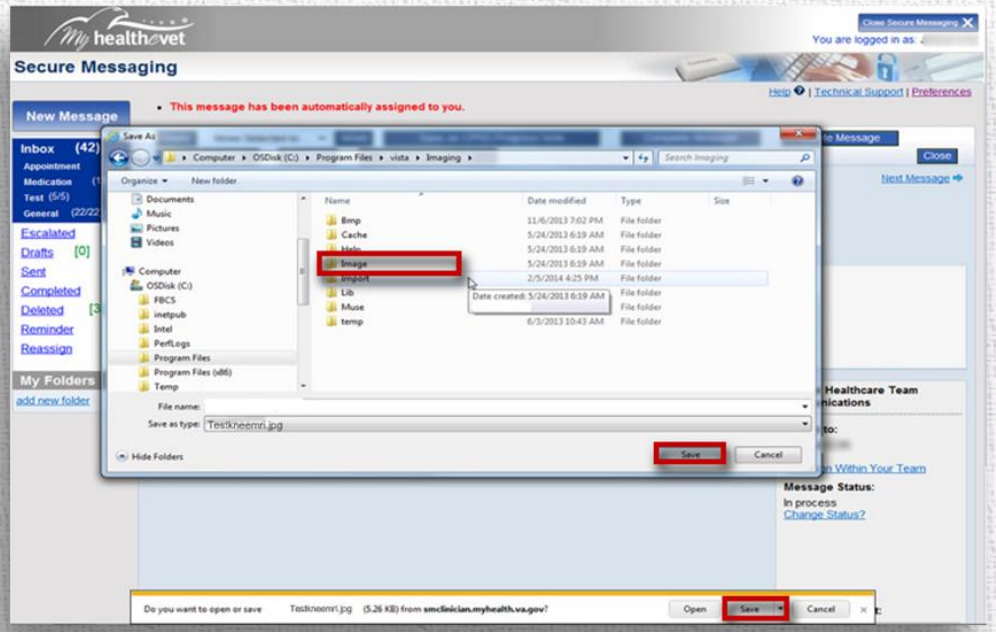
1. Select **Tools**
2. Select **Administrative Tools**
3. Select **VistA Imaging Capture**

4. Select arrow next to Save
5. Select **Save as**
   a. Save as allows you to save the attachment directly into a VistA Imaging Import Folder

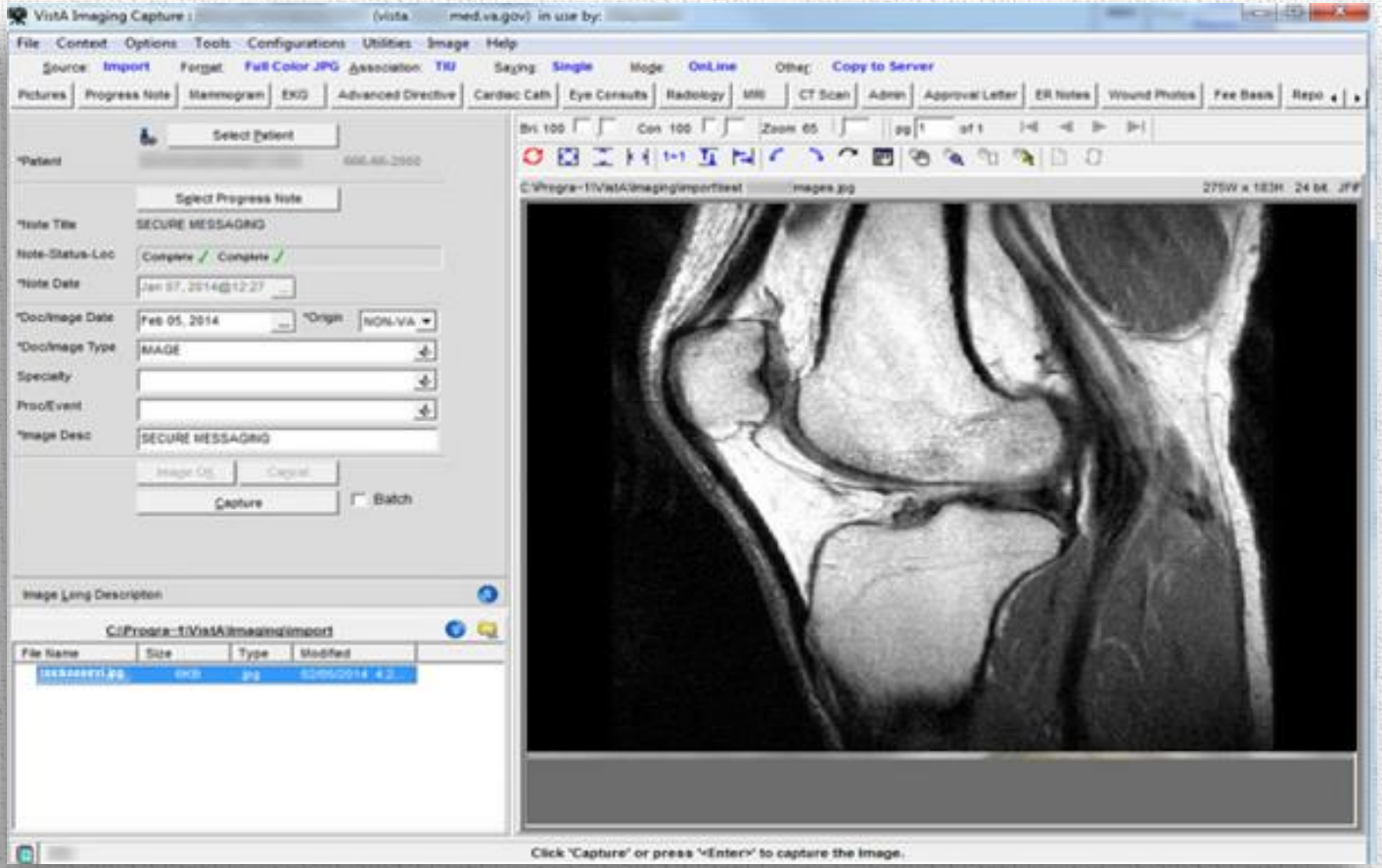


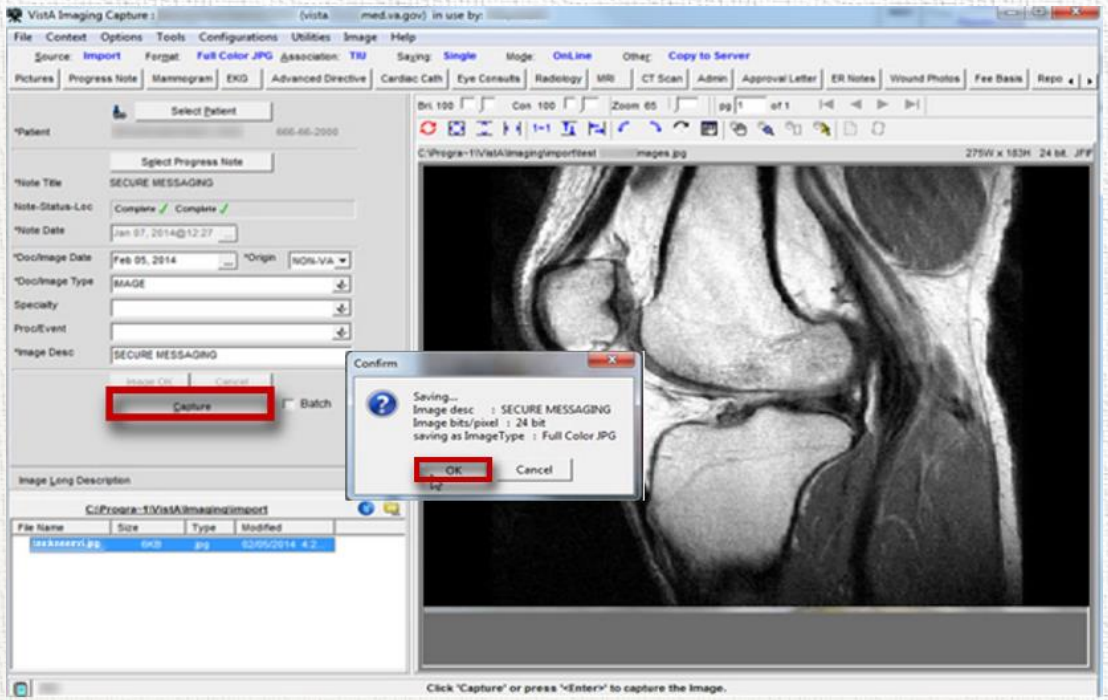
SAVING AN ATTACHMENT PAPERLESS (3 OF 6)

6. Select **folder**
7. Name file
8. Select **Save**



9. The attachment is now in the VistA Import Folder

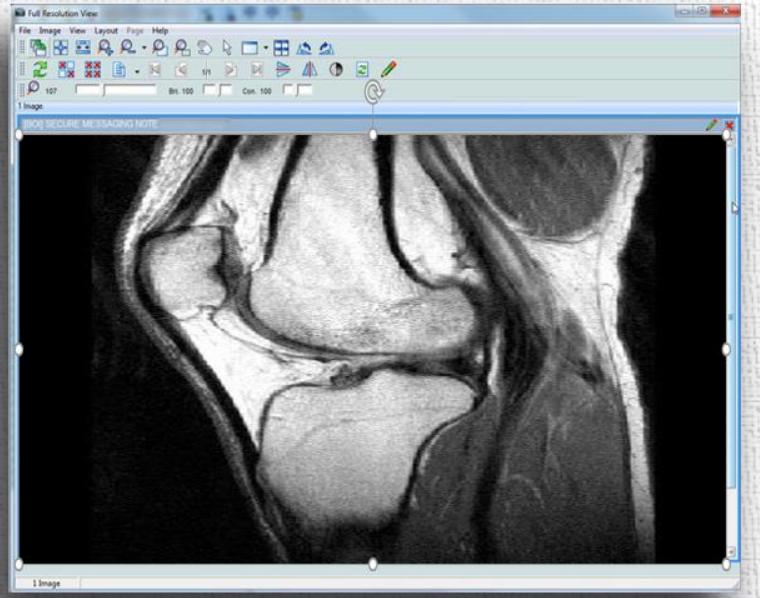




10. Select **Capture**
    a. Confirmation message displays
11. Select **OK**

SAVING AN ATTACHMENT PAPERLESS (6 OF 6)

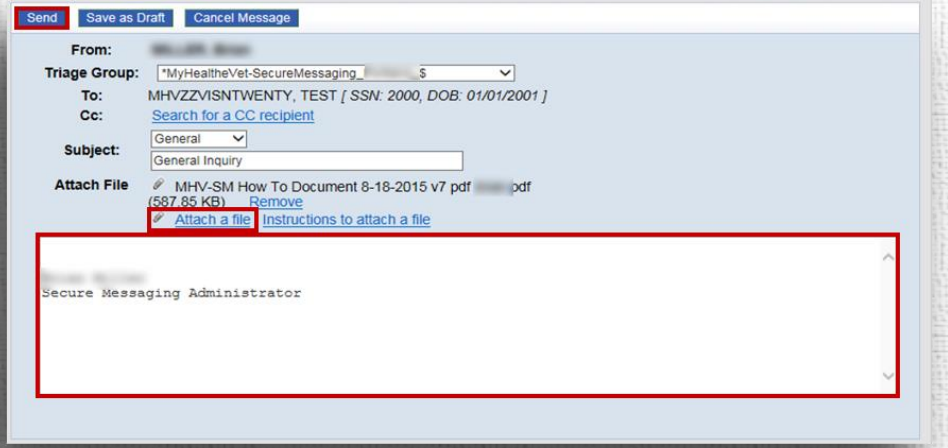
- The image is now in the Display Application
  - If the image is in color, it will save in color
- Your local HIMS staff are the experts.
- Be sure to confer with local HIMS staff to determine the best way to capture Secure Message attachments to VistA Imaging at your site
- If you print the JPG and use a flat bed scanner to save the attachment, it displays in lower quality, black and white and is less defined



REPLYING TO A SECURE MESSAGE (1 OF 2)

1. Read through and determine if you are the appropriate person to respond
   a. Yes-Select **Reply**
   b. No- Reassign to appropriate team member

2. Enter response in message area
3. Attach file(s) if desired
4. Select **Send**

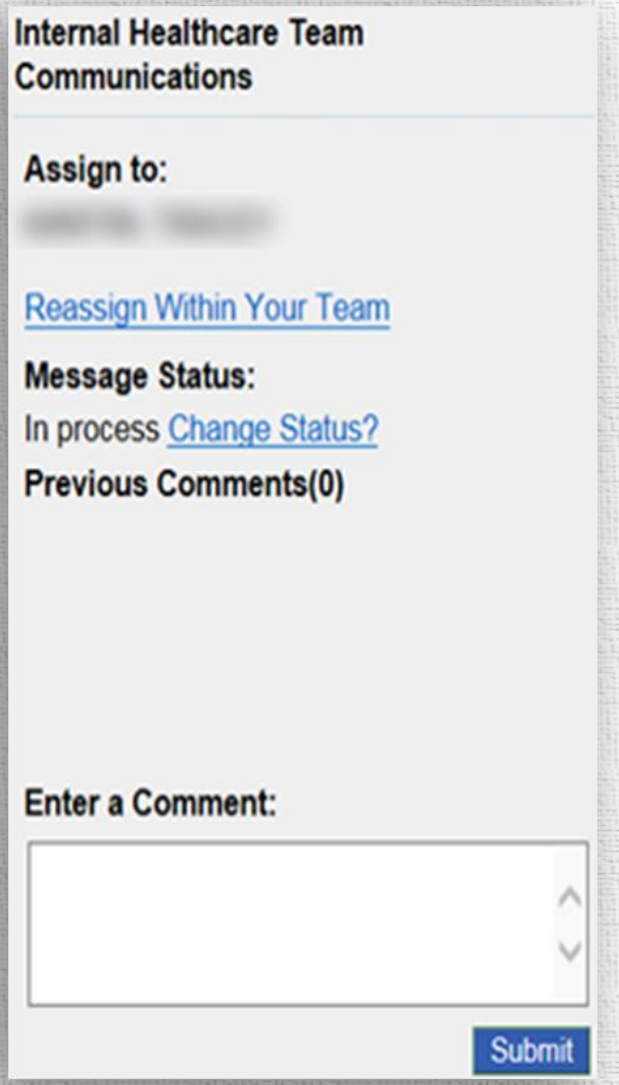


REASSIGNING A SECURE MESSAGE INTENDED FOR SOMEONE ELSE

- There are two ways to reassign a Secure Message to another staff member:
  - ❑ Link in the Internal Healthcare Team Communications box
  - ❑ **Reassign Message** button

INTERNAL HEALTHCARE TEAM COMMUNICATIONS BOX

- The Internal Healthcare Team Communications allows users to:
  - View who the message is assigned to
  - Reassign a message to someone else within their team
  - View and change the message status
  - Communicate internally using the Comments field



INTERNAL HEALTHCARE TEAM COMMUNICATIONS BOX – REASSIGN (1 OF 2)

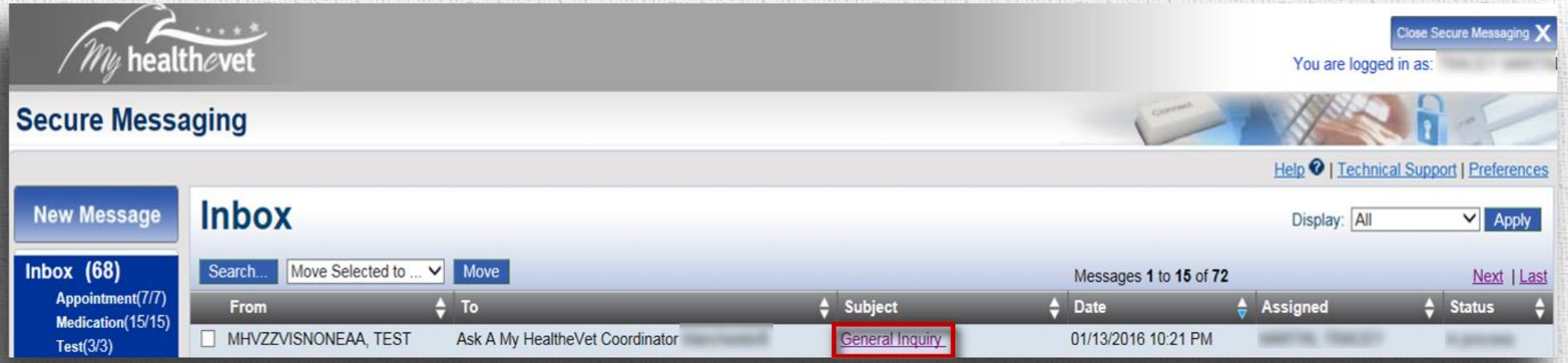
- The original team member that opened the message will see their name under the "Assign to" heading
- To reassign the message to someone else:
  1. Select the **Reassign Within Your Team** hyperlink

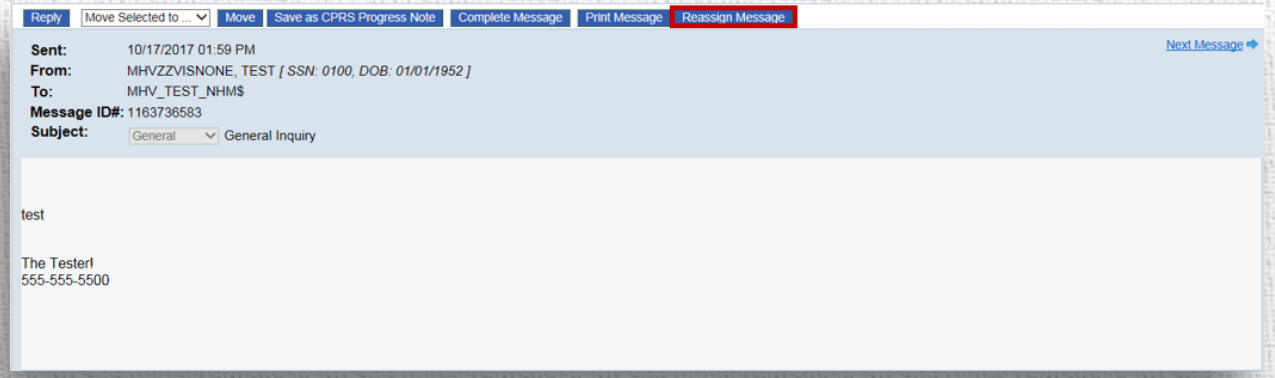
INTERNAL HEALTHCARE TEAM COMMUNICATIONS BOX – REASSIGN (2 OF 2)

2. Once the hyperlink is selected, the “Assign to” field becomes a dropdown. Use the dropdown to select a Triage Team member to assign the message.
3. Select **Submit**

REASSIGNING MESSAGE BUTTON (1 OF 3)

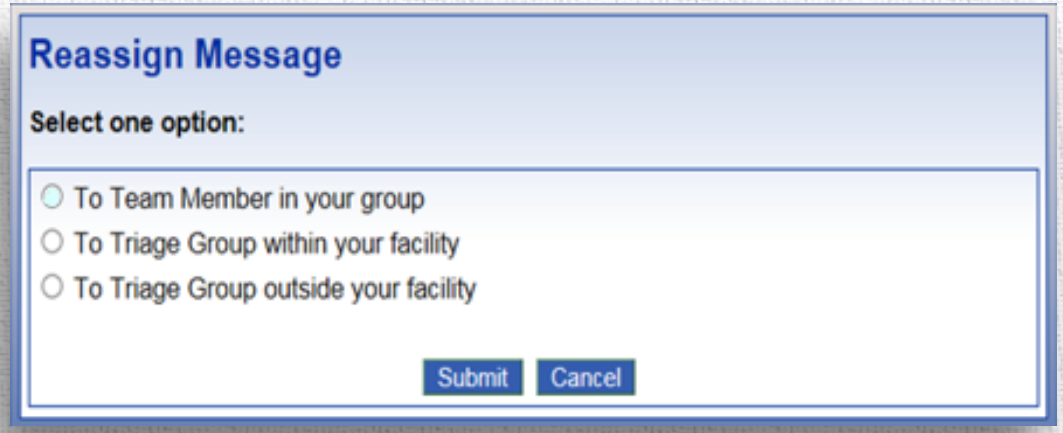
- If a message should be addressed by someone outside of your immediate Triage Group, the **Reassign Message** button can be used
- To navigate to the Reassign Message button:
  1. From the Inbox, open a Secure Message by selecting the **"Subject"** hyperlink



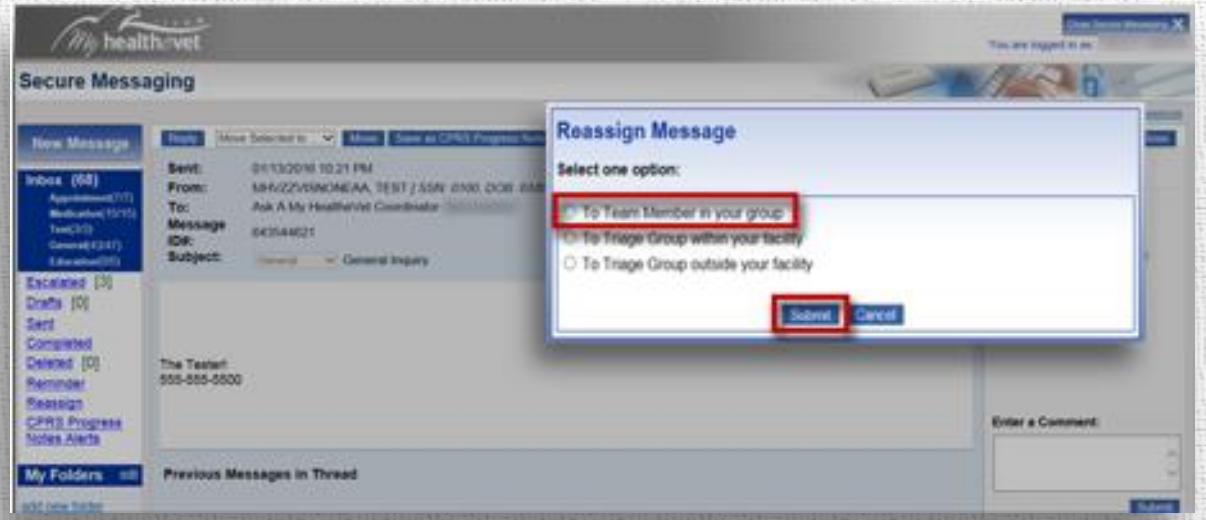


2. Select **Reassign Message**

REASSIGNING MESSAGE BUTTON (3 OF 3)



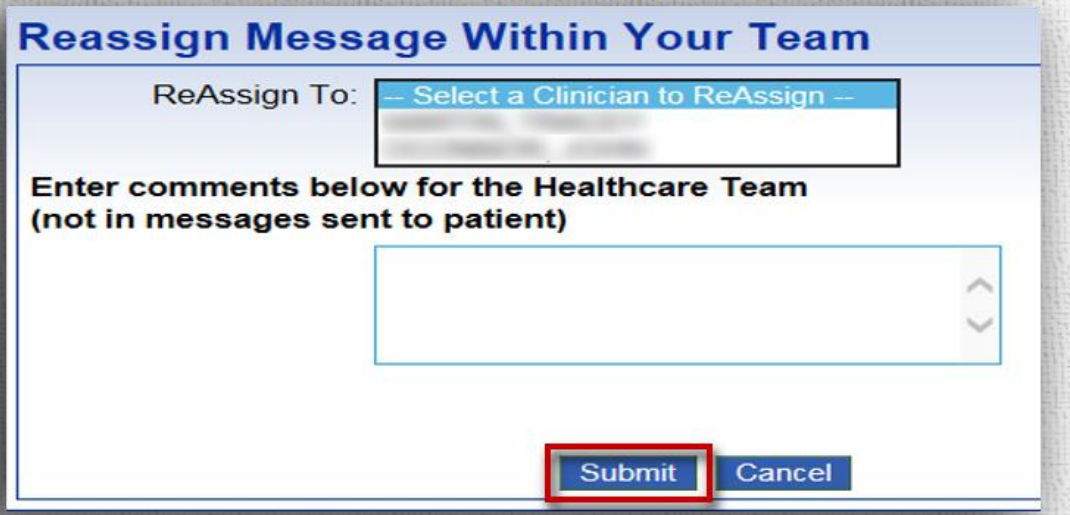
3. Choose from one of the three options displayed in the Reassign Message pop up:
   a. To Team Member in your group
   b. To Triage Group within your facility
   c. To Triage Group outside your facility

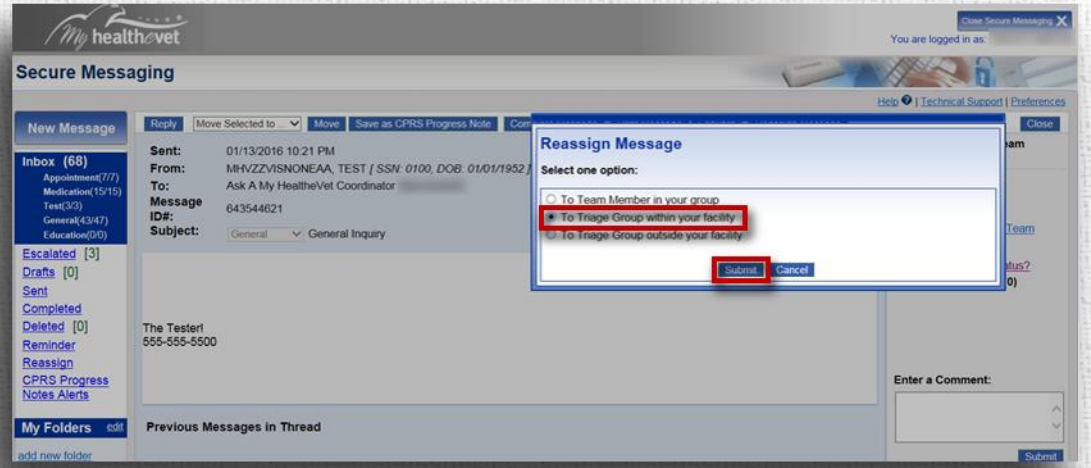


To a Team Member in your group:

1. Select **To Team Member in your group**
2. Select **Submit**

- If the radio button is selected to reassign the message **To Team Member in your group**, the Reassign Message Within Your Team popup displays
  1. Select a **clinician** to reassign the message to
  2. Enter comments for the health care team (optional)
  3. Select **Submit**





To (a different) Triage Group Within Your Facility:

1. Select **To Triage Group within your Facility**
2. Select **Submit**

REASSIGNING TO TRIAGE GROUP WITHIN YOUR FACILITY (2 OF 2)

3. Choose from the two options:

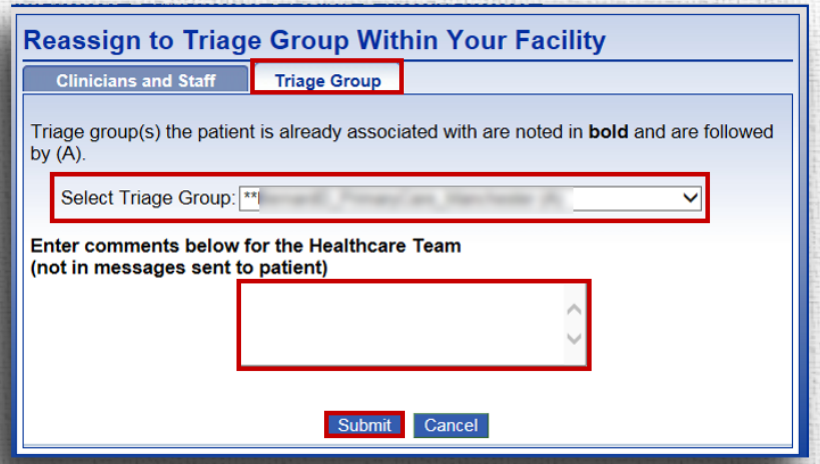
   a. Triage Group (Best Option)
      - Sending to entire team aligns with team based care and helps the Veteran receive a prompt response
   b. Clinicians and Staff (Default)
      - Sending to a specific person may delay response

If you choose to reassign to a specific clinician or staff member via the Clinicians and Staff tab:

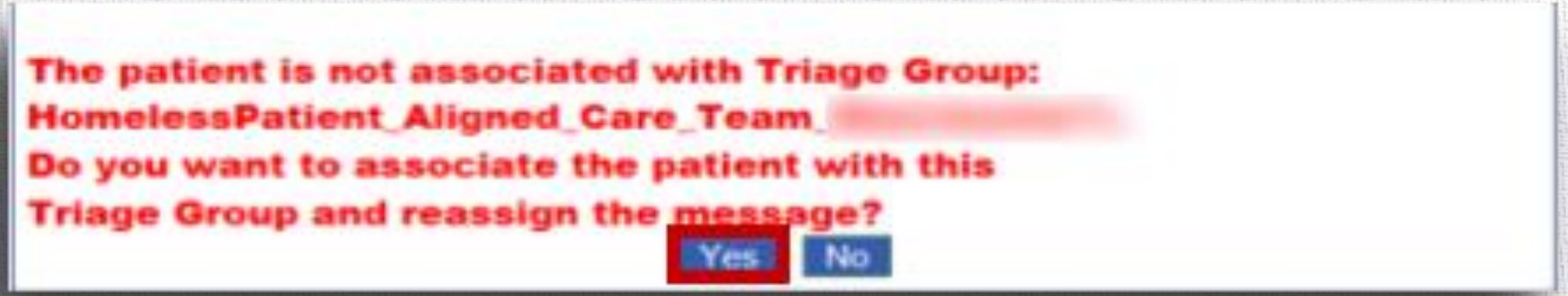
1. Enter at least one letter into the **Last Name** field to begin a search. It is best to enter the last name in its entirety. Additionally, entering as much of the name as possible speeds up the search
2. Select **Search**
3. Highlight the **Staff Member** in the dropdown menu and then choose **Select**

4. Select desired **Triage Group** from dropdown menu of teams to which the selected clinician belongs
   a. Triage Group(s) that the patient is already associated with are noted in bold and are followed by (A)
5. Enter any comments
6. Select **Submit**

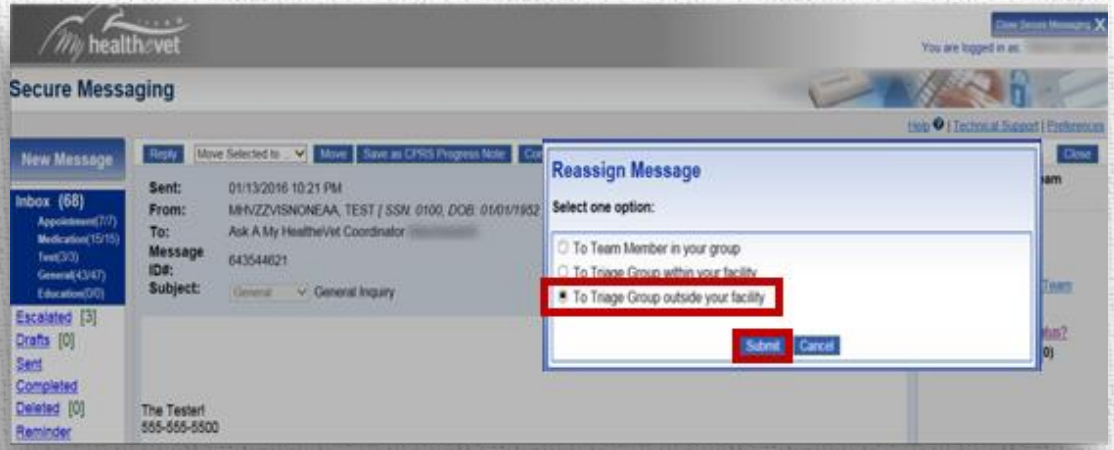
1. Select the **Triage Group Tab**
2. Select the **Triage Group** from the list of all the Secure Messaging Triage Groups
   a. Triage Group(s) that the patient is already associated with are noted in bold and are followed by (A)
3. If you reassign to an unassociated Triage Group, add an optional comment for the health care team
4. Select **Submit**



- If reassigned to unassociated Triage Group, a red message will display asking if you wish to associate the patient to this Triage Group and reassign the message
  - Yes-Message is reassigned and receiving Triage Group will see another red colored alert upon opening message informing them that the patient is now associated with their Triage Group
  - No- Action is cancelled and message is not reassigned



TO TRIAGE GROUP OUTSIDE YOUR FACILITY



1. Select the “To Triage Group outside your Facility” radio button
2. Select **Submit**
3. Select a **VISN** from dropdown menu then choose **Select**
4. Select a **Facility** from the “VISN Facility” dropdown menu then choose **Select**
   a. Two choices:
      - Triage Group (Recommended)
      - Clinicians and Staff

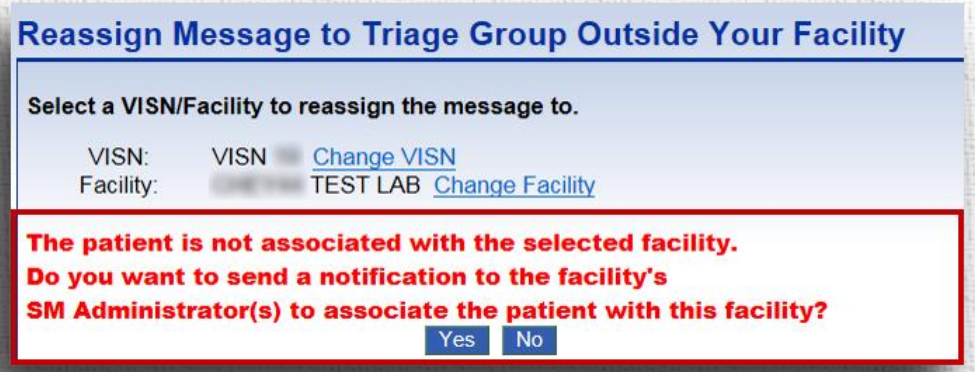
TO A TRIAGE GROUP OUTSIDE YOUR FACILITY – TRIAGE GROUP TAB

Reassigning to a Triage Group is the recommended path

1. Select **Triage Group Tab**
2. Select **Triage Group** from the list of all the Secure Messaging Triage Groups
   a. If the patient is already associated with a Triage Group, will be bold and have (A) after the group name
   b. If you reassign to unassociated Triage Group, add an optional comment
3. Select **Submit**

UNASSOCIATED TRIAGE GROUP MESSAGE

- If reassigned to unassociated Triage Group, a red message will display asking if you wish to send a notification to associate the patient with this facility
  - ❑ No- Action is cancelled
  - ❑ Yes-System sends an Outlook email notification to receiving facility Secure Message Administrator(s)
    - Work with facility's Business Office staff to add patient to VistA system
    - When successful, reassignment initiator will be contacted to again reassign the Secure Message



TO A TRIAGE GROUP OUTSIDE YOUR FACILITY – CLINICIAN AND STAFF TAB

If you choose to reassign to a specific clinician or staff member via the Clinicians and Staff tab:

1. To begin your search, you must enter at least one letter into the last name field to. It is best to enter the last name in its entirety. Additionally, entering the first name narrows the search
2. Select **Search**
3. Highlight the **staff member** in the dropdown menu then choose **Select**
4. Select a **team** that the clinician is associated with from dropdown menu of teams then choose **Submit**

SAVING SECURE MESSAGES

- Secure Messaging allows VA staff to save all or part of a Secure Message or message thread that is deemed clinically relevant as a Text Integration Utilities (TIU) note in CPRS.
  - These TIU notes are then accessible to all VA staff with appropriate access to the individual's VHA Electronic Health Record
  - Prospective subjects must be informed that any research related notes saved in CPRS could be viewed by any VA staff with appropriate access to view the subject's VHA Electronic Health Record. They are also viewable by patients via Blue Button functionality.

CERTIFICATE OF CONFIDENTIALITY (1 OF 3)

- Some studies, however, have a Certificate of Confidentiality
- A Certificate of Confidentiality (CoC) is issued for applicable Department of Veterans Affairs (VA) research by several Department of Health and Human Services (DHHS) agencies to protect research subjects by preventing investigators and institutions from being forced or compelled to release identifiable information on research subjects

CERTIFICATE OF CONFIDENTIALITY (2 OF 3)

- It allows the investigator and others who have access to research records to refuse to disclose identifying information on research subjects in any civil, criminal, administrative, legislative, or other proceeding, whether at the federal, state, or local level. The CoC helps to minimize risks by adding an additional level of protection for maintaining the privacy and confidentiality of research subjects in a VA study

CERTIFICATE OF CONFIDENTIALITY (3 OF 3)

- Current ORD policy in VHA Handbook 1200.05, Paragraph 21 states that for studies with a Certificate of Confidentiality that do not involve a medical intervention (e.g., observational studies, including interviews and questionnaire studies), no annotation may be made in the health record

Studies that do not involve medical intervention:

- No annotation may be made in the health record
- Cannot be saved as a TIU note in VHA health record
- Document the communication in the investigator's research file
  - ❑ Secure Messages are considered part of the investigator records
  - ❑ Must be retained as required by VHA's Record Control Schedule 10-1
  - ❑ Investigators are strongly encouraged to copy all communication from Secure Messaging
  - ❑ Secure Messages are viewable in the Secure Messaging folders for one year. Messages older than a year can be obtained through the facility Release Of Information (ROI) Office

HOW TO DOCUMENT COMMUNICATION VIA SECURE MESSAGING INVOLVING MEDICAL INTERVENTION

Studies that involve medical intervention:

- Secure Messaging allows VA Staff to save all or part of a message or message thread that is deemed clinically relevant as a TIU note in CPRS

Studies that involve medical intervention AND has a Certificate of Confidentiality:

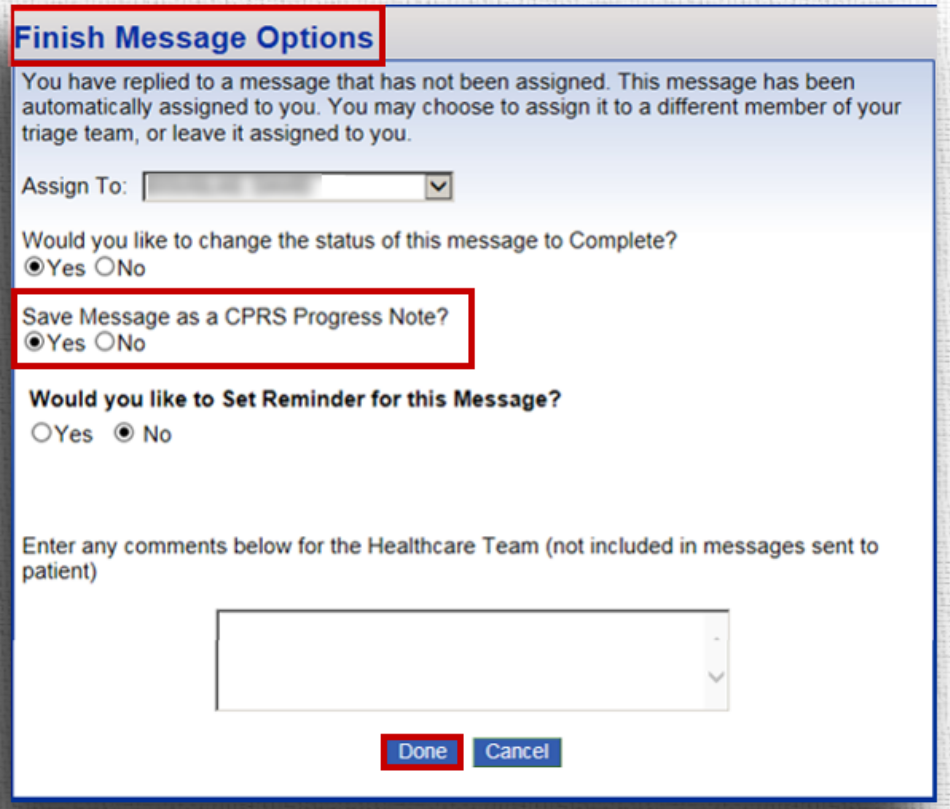
- ORD policy states that any details that would affect the subject's clinical care are to be included in Progress Notes

- The VA Principal Investigator (PI) is responsible for determining when Secure Messaging communications will be placed in CPRS
- If the Secure Messaging communication for a medical intervention study with a Certificate of Confidentiality involves a subject safety issue as determined by the VA PI, it must be placed into a TIU note in CPRS
- Subject safety is always the first priority and should never be compromised by withholding information needed by a VA research subject's healthcare team

BUSINESS RULES FOR TIMELY SECURE MESSAGE RESPONSE

- It is very important that Secure Messages are responded to within a timely manner and marked as complete within the Secure Messaging application
- Secure Messages must be marked as complete within three (3) federal business days or they will escalate within the Secure Messaging application
- Secure Messages are completed by the user by changing the message status to Complete in the Healthcare Communication Box

- Once you reply and select **Send**, the response is sent to the patient and you will see the Finish Message Options box.
  1. Leave default of **Yes** to changing message status to Complete
  2. Select **Yes** to Save Message as a CPRS Progress Note
  3. Set Reminder if desired
  4. Enter any desired comments for Healthcare Team
  3. Select **Done**

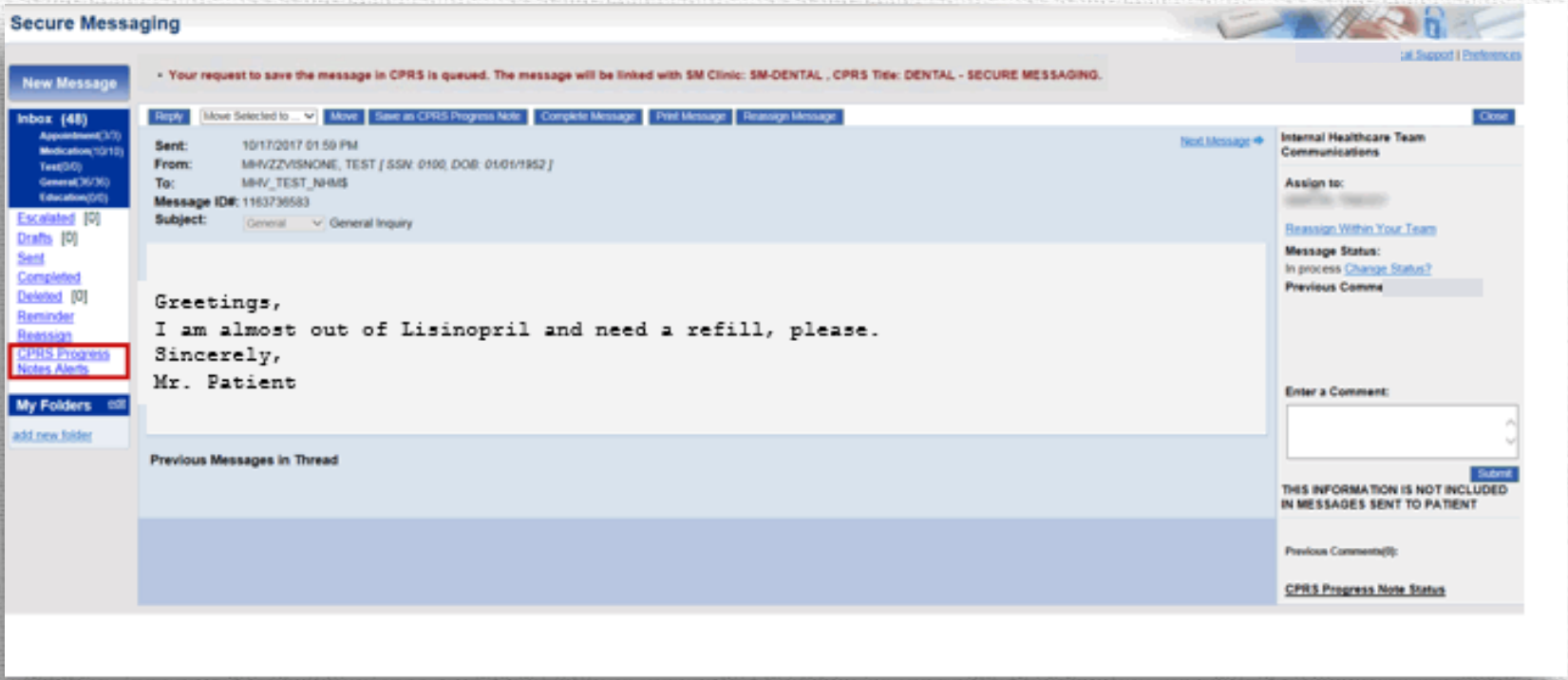


- Select **all message threads**
  - ❑ saves all messages to Progress Note

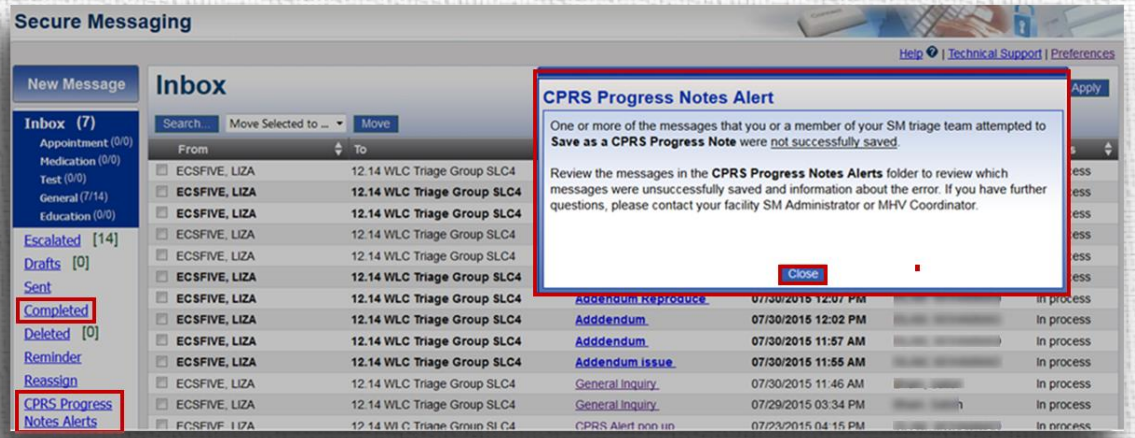
OR

- Select individual messages within the message thread if not all are desired to be saved to Progress Note

Your request to save the Secure Message in CPRS has been sent. If this Secure Message fails to save, you will receive a notification in the CPRS Progress Notes Alerts Folder.



CPRS PROGRESS NOTES ALERT POP-UP



Sent successfully:

- No CPRS Progress Notes Alert when you log in
- Not in CPRS Progress Notes Alerts folder
- In Completed folder

- You can find any Secure Messages that failed to save in your CPRS Progress Notes Alerts folder.

Secure Messaging

Help | Technical Support | Preferences

New Message

Inbox (96)
Appointment(4/8)
Medication(9/25)
Test(15/22)
General(56/207)
Education(12/29)
Escalated [255]
Drafts [9]
Sent
Completed
Deleted [0]
Reminder
Reassign
CPRS Progress Notes Alerts

My Folders edit
Appointments
Lab Reports
My Test Folder
add new folder

CPRS Progress Notes Alerts

Search... Remove Selected

Messages 1 to 1 of 1

From	To	Subject	Date	CPRS Alert Date	Assigned	Status
MCTP, ALPHA	REASSIGN TRIAGE GROUP 1_ and	test2	08/14/2015 01:37 PM	08/14/2015 01:42 PM		In process

Select: All, None, Read, Unread

Messages 1 to 1 of 1

- The Error Message text will be in red above the message when opened. It will give you instructions on what to do to successfully save the message.

Secure Messaging

Help | Technical Support | Preferences

New Message

Inbox (96)
Appointment(4/8)
Medication(9/25)
Test(15/22)
General(56/207)
Education(12/29)
Escalated [255]
Drafts [9]
Sent
Completed
Deleted [0]
Reminder
Reassign
CPRS Progress Notes Alerts

My Folders edit
Appointments
Lab Reports
My Test Folder
add new folder

• Previous attempt to save message as Progress Note failed: AUTHOR/DICTATOR name discrepancy between HL7 message IEN/SSN & the HL7 message name .
Note: Please contact your SM Administrator and/or MHV Coordinator to assist in correcting the error.

Save as CPRS Progress Note | Close

Sent: 08/14/2015 01:37 PM
From: MCTP, ALPHA [SSN: 7310, DOB: 09/23/1950]
To: REASSIGN TRIAGE GROUP 1
Message ID#: 526427
Subject: General test2

test2

Previous Messages in Thread

Internal Healthcare Team Communications

Assign to:

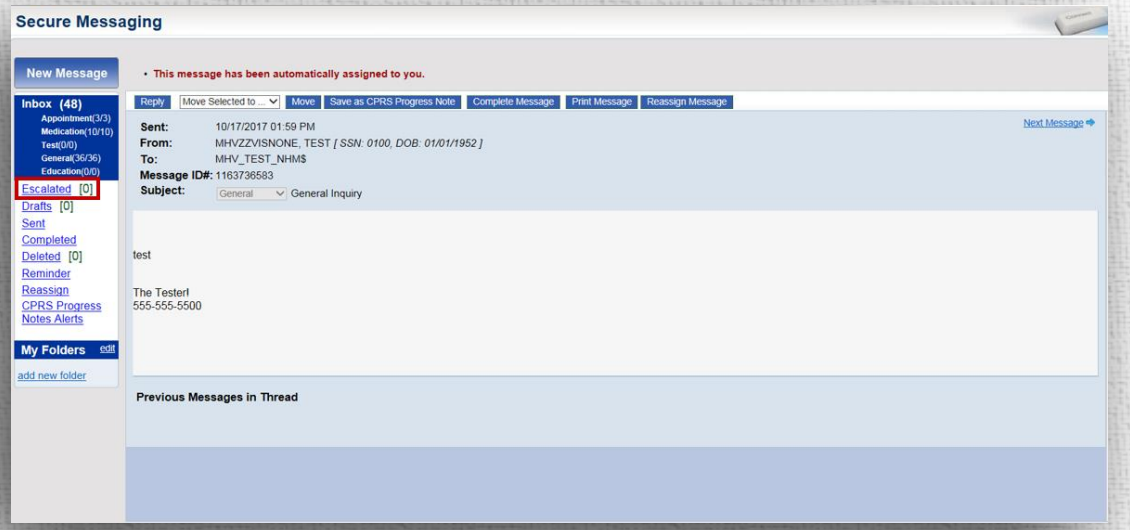
Message Status:

THIS INFORMATION IS NOT INCLUDED IN MESSAGES SENT TO PATIENTS

Previous Comments(0):

CPRS Progress Note Status
08/14/2015 01:42 PM
Unsuccessful in saving message as CPRS Progress Note by

ESCALATED MESSAGES



- Messages not “Complete” within 3 business days become “escalated” and should be resolved and responded to immediately
- Once a message is escalated, **ALL** team members receive an Outlook Email Notification regardless of their Preference settings
- Teams are responsible for ensuring escalated messages are responded to and completed immediately and that steps are put in place to prevent future escalations
- The local My Health***e***Vet Coordinator/Secure Messaging Administrator tracks all escalated messages and will notify the Supervisors of teams failing to meet the 3-day standard of Completion

COMPLAINTS SENT THROUGH SECURE MESSAGING

Complaints sent by a Subject through Secure Messaging are evaluated in the same way as any complaint received from a VA Subject in a VA research study.

- Refer to local Human Research Protection Policy procedures to determine when the complaint should be reported to the IRB of Record for the specified study

CONSIDERATIONS FOR VA RESEARCH STUDY SUBJECTS INSTRUCTIONS

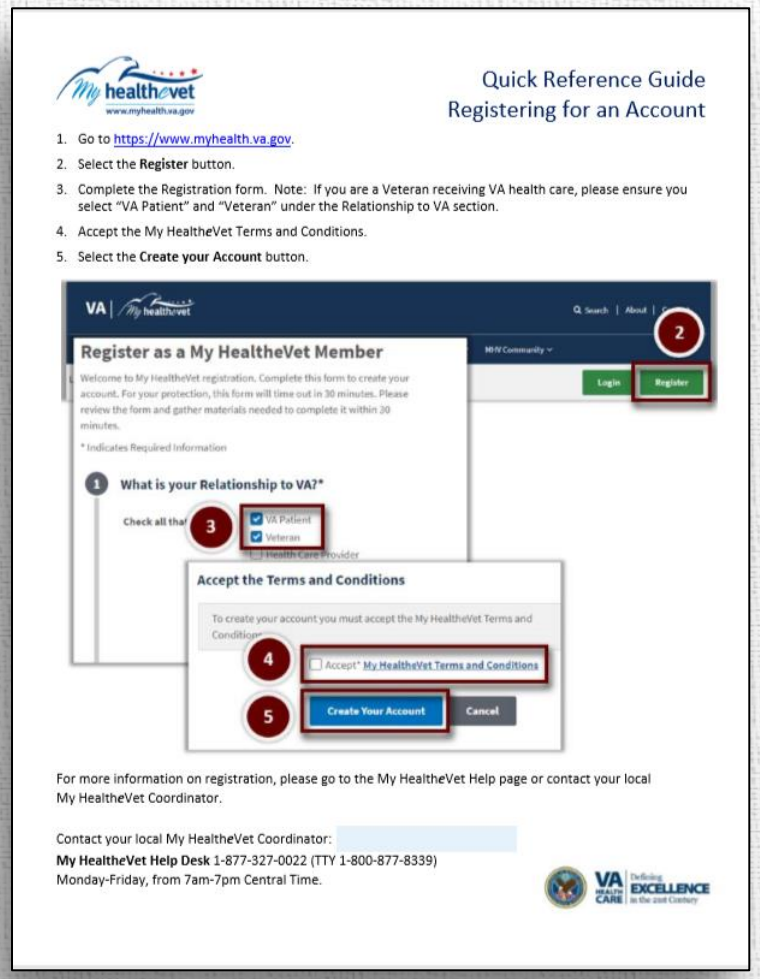
When planning a study that will use Secure Messaging for study related communication, consider:

- How will instructions be given to subjects
  - ❑ Orally
  - ❑ Written
  - ❑ Both
- When will instructions be given

- Instructions should be specific for:
  - ❑ How to identify communication from the study
  - ❑ How to contact the study team
- Identify training needs for both staff and subjects before study is submitted

- My Health*e*Vet Product Site @ http://vaww.va.gov/MYHEALTHEVET/index.asp
- Secure Messaging SharePoint Site @ http://vaww.oed.portal.va.gov/development/target/veteran_health/myHealtheVet/SMChampions/default.aspx
- My Health*e*Vet website at https://www.myhealth.va.gov

- On My HealtheVet Product Site: https://vaww.va.gov/MYHEALTHEVET/Training.asp
  - ❑ Registering for an Account
  - ❑ Upgrading an Account
  - ❑ Accessing Secure Messaging
  - ❑ Viewing a Secure Message
  - ❑ How to view an Attachment
  - ❑ Replying to a Secure Message
  - ❑ How to include Attachments
  - ❑ Getting Help



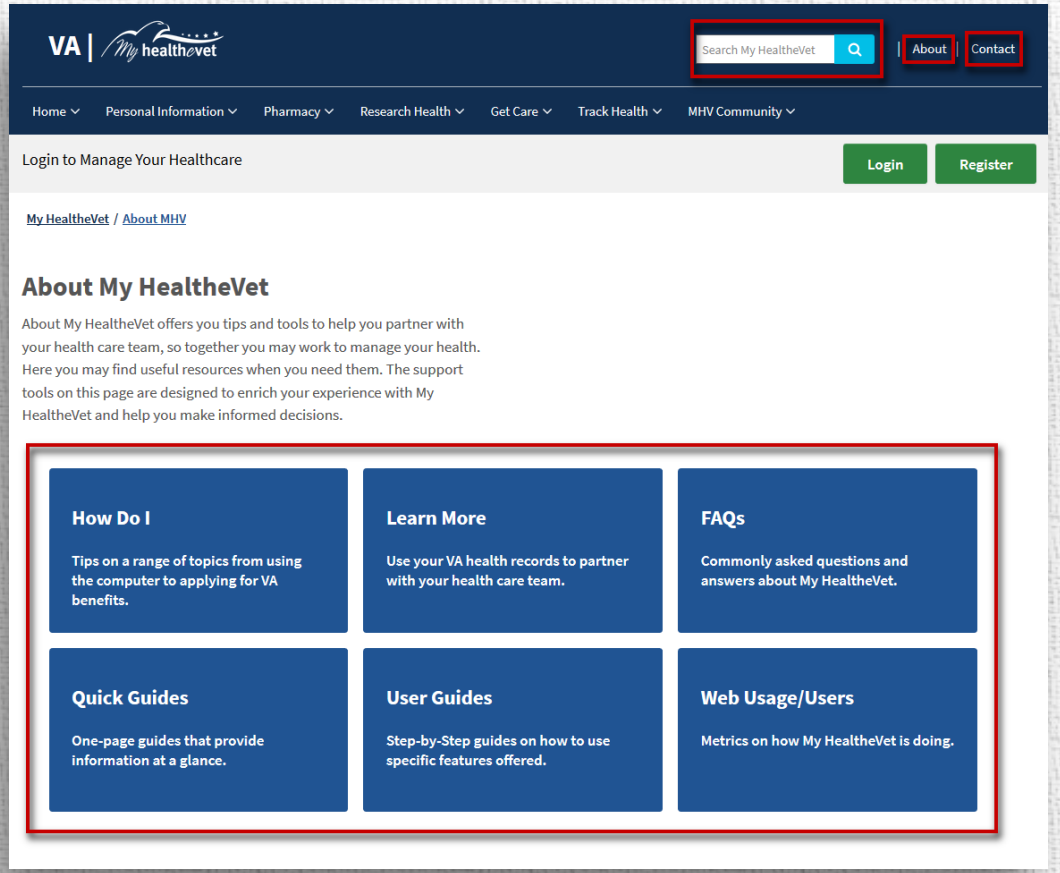
Quick Reference Guide
Registering for an Account

1. Go to https://www.myhealth.va.gov.
2. Select the **Register** button.
3. Complete the Registration form. Note: If you are a Veteran receiving VA health care, please ensure you select "VA Patient" and "Veteran" under the Relationship to VA section.
4. Accept the My HealtheVet Terms and Conditions.
5. Select the **Create your Account** button.

For more information on registration, please go to the My HealtheVet Help page or contact your local My HealtheVet Coordinator.

Contact your local My HealtheVet Coordinator:
My HealtheVet Help Desk 1-877-327-0022 (TTY 1-800-877-8339)
Monday-Friday, from 7am-7pm Central Time.

- On My Health*e*Vet website at https://www.myhealth.va.gov
  - ❑ My Health*e*Vet Navigation Guide
  - ❑ Quick Reference Guides
  - ❑ Quick Guides
  - ❑ User Guides
  - ❑ Search
  - ❑ About



- On My HealtheVet Product Site: https://vaww.va.gov/MYHEALTHEVET/Training.asp
  - ❑ Decision Tree for Researchers
  - ❑ Naming Convention for Research Secure Messaging Triage Groups
  - ❑ How to Document Communication with Subjects-Not Involving Medical Intervention
  - ❑ How to Document Communication with Subjects - Involving Medical Intervention
  - ❑ How to Document Communication with Subjects- Involving Medical Intervention and has Certificate of Confidentiality

- On My Health*e*Vet Product Site: https://vaww.va.gov/MYHEALTHEVET/Training.asp
  - ❑ Setting Preferences:
    - Secure Messaging Email Notifications
    - Surrogate Secure Message Forwarding
    - Secure Messaging Inbox
    - Secure Messaging Signature

- ❑ Accessing Secure Messaging
- ❑ Viewing a Secure Message
- ❑ Saving an Attachment
- ❑ Replying to a Secure Message

ADDITIONAL RESOURCES FOR ALL VA STAFF

- Additional QRG's:
  - ❑ Modifying a Distribution Group
  - ❑ How to Reassign a Message- Using Healthcare Team Communication Box
  - ❑ How to Reassign a Message- Using Reassign Message Button
  - ❑ Escalated Messages
  - ❑ How to Complete a Secure Message
  - ❑ How to Save to CPRS
  - ❑ CPRS Progress Notes Alert

- Secure Messaging Examples, Documentation and Information Handbook at http://vaww.va.gov/MYHEALTHEVET/docs/secure_messaging/VMH132_MHV_Secure_Messaging_Handbook.pdf

- Secure Messaging Section on My Health*e*Vet Product Site at https://vaww.va.gov/MYHEALTHEVET/Secure_Messaging.asp:
  - ❑ Information for Healthcare Teams
    - Secure Messaging Team User Guide
    - Secure Messaging Tactical Guide
  - ❑ Frequently Asked Questions (FAQ's)
  - ❑ Training and Education
    - Secure Messaging Administrator User Manual
  - ❑ PowerPoint Presentations
  - ❑ Promotional Materials
    - Patients
    - Healthcare Team

- You can email MHVSecureMessagingFieldQuestions@va.gov with specific questions about accessing and using My Health*e*Vet Secure Messaging.

What type of My Health*e*Vet user access must a research study subject have in order to use Secure Messaging?

a. Visitor
b. Basic
c. Advanced
d. Premium

Select as many as applicable

KNOWLEDGE CHECK QUESTION #4

All Secure Messages in a Research Study are saved to the health records.

- True
- False

During this session, you learned to:

- Describe My Health***e***Vet and Secure Messaging
- Explain how Secure Messaging can be used by VA Researchers
- State why Secure Messaging can't be used for Research Recruitment
- Explain the requirements to use Secure Messaging to communicate with consented VA subjects
- Understand the decision making process for using Secure Messaging for research
- Describe the format for naming a Secure Messaging Triage Group for a specific study

RECAP (2 OF 2)

- List the steps to use Secure Messaging by VA researchers for an approved VA study
- Explain how to ensure messages from subjects in the VA study are received
- Describe how VA study subjects can register for My Health***e***Vet
- List considerations for instructions for Veterans for the use of Secure Messaging with the study team
- Describe the steps to handle a Secure Messaging received in error for healthcare team
- List the Business Rules for timeliness of response to a Veteran Secure Message
- Explain the process to handle complaints sent through Secure Messaging
- Explain how to document communication with VA research subjects

Veterans Health Administration
Research & Development
Improving Veterans' Lives www.research.va.gov

VETERANS HEALTH ADMINISTRATION

Guidance for VA Researchers on the Use of My Health*e*Vet Secure Messaging

Date: March 12, 2018

This is a new Guidance document. Please submit comments and suggestions regarding this document to the VHA Office of Research and Development (ORD) at VHACOORDRegulatory@va.gov.

SCOPE: This document provides guidance for VA Investigators and VA research team members on the use of My Health***e***Vet Secure Messaging for communicating with VA subjects in the conduct of approved VA research. My Health***e***Vet is an online portal created by the Department of Veterans Affairs to help Veterans, active-duty service members, and their dependents in managing their health care, work with healthcare providers to reach informed decisions, and improve their overall health. My Health***e***Vet offers a suite of tools including access to their health records and a Secure Messaging system to communicate with their healthcare team and other VA staff. This ORD guidance is based on the recognition that (a) the privacy and confidentiality of VA subject information sent and received by VA researchers is a component of the Institutional Review Board (IRB) of Record's evaluation of the human subjects research activity, (b) My Health***e***Vet's Secure Messaging application cannot presently be used to recruit VA subjects or as part of any recruitment activities in research, (c) the clinical functionality of My Health***e***Vet's Secure Messaging must always be considered in relation to the research functionality, and (d) all existing research policies apply. The following questions are discussed in this guidance document:

1. What is My Health***e***Vet?

2. Can My Health***e***Vet Secure Messaging be used by VA researchers?

3. Why can't My Health***e***Vet Secure Messaging be used for research recruitment activities?

4. What is a VA researcher required to submit to an Institutional Review Board if they want to use My Health***e***Vet Secure Messaging to communicate with consented VA subjects?

5. Is a VA researcher required to use a specific format for naming the Secure Messaging Triage Group for a specific study?

6. What do VA researchers need to do to use My Health***e***Vet Secure Messaging once the IRB of Record and R&D Committee have approved a VA study?

7. If I already receive My Health***e***Vet Secure Messages from patients in the context of my clinical service at VA, what do I need to do to establish a separate Secure Messaging triage group for messages from study participants in the context of my research?

8. What do VA researchers need to do if a Veteran has been enrolled into a VA study but does not yet have a Premium My Health***e***Vet account?

9. What instructions should VA researchers give to Veterans regarding communicating with the study team using My Health***e***Vet Secure Messaging?

10. If a Veteran sends a complaint about the research study through My Health***e***Vet Secure Messaging, does it require reporting to the IRB of Record or is there a special reporting system?

11. What happens if a VA research team member receives a Secure Message from a Veteran that is intended for the Veterans' healthcare team?

12. How should communication with VA research subjects via My Health***e***Vet Secure Messaging be documented? What if a VA research study has a Certificate of Confidentiality?

13. What are the business rules for timeliness of response to a Veteran Secure Message?

14. How can I learn more about My Health***e***Vet Secure Messaging?

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1. What is My Health*e*Vet?

My Health***e***Vet (www.myhealth.va.gov) is an online portal created by the Department of Veterans Affairs to help Veterans, active-duty service members, and their dependents work with healthcare providers to reach informed decisions and improve their overall health. My Health***e***Vet offers a suite of tools designed to assist Veterans in managing their health care. VA patients with a Premium My Health***e***Vet account can access their health records, refill VA prescriptions, receive email reminders about appointments, and communicate with members of their healthcare team and other VA staff using Secure Messaging.

2. Can My Health*e*Vet Secure Messaging be used by VA researchers?

Yes, My Health***e***Vet Secure Messaging can be used by VA researchers to communicate securely with VA subjects who have consented to participate in a VA approved research activity as approved by the VA Facility's Institutional Review Board (IRB) of Record as described in VHA Handbook 1200.05: Requirements for the Protections of Human Subjects in Research. VA researchers can use Secure Messaging to send VA sensitive information to VA research subjects. However, Secure Messaging cannot be used to recruit VA subjects or as part of any recruitment activities in research.

3. Why can't My Health*e*Vet Secure Messaging be used for research recruitment activities?

At the present time, there is no option available for individuals with a My Health***e***Vet account to "opt-in" or "opt-out" of receiving research recruitment messages. Individuals with an account should have the ability to decide whether or not they wish to receive research

recruitment messages or flyers through Secure Messaging. Therefore, until functionality is expanded to allow individuals with a My Health***e***Vet account to choose whether or not they wish to receive recruitment information or advertisements for research, use of Secure Messaging to recruit research subjects is not permitted.

4. What is a VA researcher required to submit to an Institutional Review Board if they want to use My Health*e*Vet Secure Messaging to communicate with consented VA subjects?

As part of an IRB's evaluation of non-exempt research, the IRB must apply the approval criteria in 38 CFR 16.111 as described in VHA Handbook 1200.05, Paragraph 10. These criteria include evaluation of communications provided to study participants in order to ensure that appropriate safeguards exist to protect the rights and welfare of research subjects and, when appropriate, that there are adequate provisions to protect the privacy of subjects and to maintain the confidentiality of data (38 CFR 16.111(a)(7)).

A research activity may use multiple methods to communicate with research subjects, such as face-to-face communication, telephone calls, letters sent by U.S. mail, My Health***e***Vet Secure Messaging, email, or text messaging. The specific types of communication that will be utilized in a particular research study must be specified in the study protocol, IRB application, or supplement to the IRB application as part of the IRB application process. Please note that applicable information security and privacy requirements described in VA 6500: Information Security Handbook and VHA Directive 1605.01: Privacy and Release of Information must be adhered to in addition to IRB approval requirements for non-exempt human subjects research activities. The study team will need to specify in the study protocol, IRB application, or supplement to the IRB application if Veterans can choose Secure Messaging, traditional methods such as telephone calls or letters sent by U.S. Mail, or a combination of communication methods. If a VA researcher is planning to use standardized messages that will be sent to research participants through Secure Messaging, the content of these messages must be reviewed by the IRB of Record for the research activity.

In addition, My Health***e***Vet Secure Messaging allows VA staff to save all or part of a Secure Message or message thread that is deemed clinically relevant as a Text Integration Utilities (TIU) note in the Computerized Patient Record System (CPRS). These TIU notes are then accessible to all VA staff with appropriate access to the individual's VHA Electronic Health Record. Therefore, as part of the informed consent process, prospective subjects must be informed that any research related notes saved in CPRS could be viewed by any VA staff with appropriate access to view the subject's VHA Electronic Health Record.

5. Is a VA researcher required to use a specific format for naming the My Health*e*Vet Secure Messaging Triage Group for a specific study?

A study-specific name must be used when My Health***e***Vet Secure Messaging is used for a research study. This study-specific name allows the individual with a My Health***e***Vet account to distinguish between Secure Messages that are related to his or her healthcare versus research related communication. The study-specific name is created using a combination of four items: two standardized phrases and two study-specific phrases. The required format is a combination of three letters indicating the study site, the word "Research", the study name or a short phrase that would allow identification of the message with the study, and "STUDY_RES". Note that the character limit for the Secure Messaging

Triage Group is 50 characters. The My Health***e***Vet Coordinator at the local VA facility should be consulted when a VA researcher is ready to establish a study-specific name for the study's Secure Messaging Triage Group. For example, if the Baltimore VA was a participating site in a multisite study called, "A comparison of Type II Diabetes and three modalities of activity to evaluate short-term and long-term effects on physical and psychological complications of Diabetes", the study-specific name for the associated Secure Messaging Triage Group would be:

BAL-RESEARCH-DIABETES AND ACTIVITY-STUDY_RES

The above applies the following in creating a specific study-name for use of Secure Messaging: [3 Character Site]-RESEARCH-[Study Name]-STUDY_RES

6. **What do VA researchers need to do to use My Health*e*Vet Secure Messaging once the IRB of Record and R&D Committee have approved a VA study?**

To participate in My Health***e***Vet Secure Messaging, VA researchers, including any research team member using Secure Messaging, must receive education and training on the use of Secure Messaging. Each Veterans Integrated Service Network (VISN) and VA Facility has a My Health***e***Vet Coordinator/Secure Messaging Administrator to help facilitate and implement Secure Messaging within their purview. Once the necessary training has been completed, the My Health***e***Vet Coordinator/Secure Messaging Administrator will activate the research team member's account within the Secure Messaging Administrative Portal.

The My Health***e***Vet Coordinator at the local VA facility should be consulted to finalize the study-specific name that will be used for the Secure Messaging Triage Group. Once the study-specific name has been finalized and the research team members' accounts are activated, the VA research study team should identify the triage process that will be used for incoming Secure Messages. Any/all members of the study team Secure Messaging Triage Group can set their individual preferences to be alerted when a message is received from a VA subject. Research subjects can then be manually associated with the study team Secure Messaging Triage Group once they are consented into the study so that an association is created between the research team and the subject. The My Health***e***Vet Coordinator at the local VA facility can assist with setting up a Secure Messaging Triage Group and adding individuals by manual association.

7. **If I already receive My Health*e*Vet Secure Messages from patients in the context of my clinical service at VA, what do I need to do to establish a separate Secure Messaging triage group for messages from study participants in the context of my research?**

If you are a VA researcher who also provides primary or specialty care, you may already be using Secure Messaging. Although VA staff can belong to multiple Secure Messaging Triage Groups, it is important to note that <u>all</u> Secure Messaging users *have one set of preferences for New Message Notification and Inbox View*. For example, if the Secure Message User has his or her Secure Messaging Preferences set to be notified of a Secure Message **only** when it is specifically assigned to him or her, and to **only see** Secure Messages that have been specifically assigned to the them in the Secure Messaging Inbox; he or she would not see a new message that came in for the triage team unless someone else on the team opened it and reassigned it to the them. This "on assignment" preference works for most primary and specialty care teams because an RN, LPN or an MSA that is also on the team is typically the initial reviewer of messages for that team, handling what

they can and reassigning what they cannot resolve. The VA research team can also designate a study team member to review and triage incoming secure messages and respond or assign them to other team members as needed. This may be an effective strategy for VA researchers who are also providers and therefore, may want to keep their Message Notification and Inbox View Preferences to “On Assignment” and “Only Messages Assigned to me” respectively.

8. What do VA researchers need to do if a Veteran has been enrolled into a VA study but does not yet have a Premium My Health*e*Vet account?

There are three different types of My Health***e***Vet user accounts: Basic, Advanced, and Premium. In order to use My Health***e***Vet Secure Messaging, the Veteran must be registered for an account (Basic), correlated with the Master Veteran Index or MVI (Advanced), and complete a onetime authentication process (Premium). Authentication is a process by which VA verifies a Veterans’ identity before allowing access to all of the features of the My Health***e***Vet patient portal, including Secure Messaging. The Authentication process can be done in-person or online. Please refer the Veteran to the local VA Facility’s My Health***e***Vet Coordinator if the Veteran wishes to utilize My Health***e***Vet Secure Messaging but does not yet have a Premium My Health***e***Vet account. Please note that the Veteran will need to select “VA Patient” when they register for their My Health***e***Vet account or update their profile.

Please keep in mind that a Veteran’s participation in research and use of My Health***e***Vet Secure Messaging is voluntary. VA researchers are encouraged to develop alternative strategies of communicating sensitive information to VA research subjects if the use of My Health***e***Vet Secure Messaging is not desired by the Veteran. Alternatively, if a particular study requires access to Secure Messaging as an integral part of the study design, this should be noted in study eligibility criteria and also outlined in the study protocol.

9. What instructions should VA researchers give to Veterans regarding communicating with the study team using My Health*e*Vet Secure Messaging?

VA researchers should consider how and when instructions will be given to VA research subjects when Secure Messaging is used for study related communication. Instructions may need to be given orally and/or in writing. Instructions should be specific enough that the VA research subject is able to identify when the study team is communicating with him or her through the use of the study-specific Secure Messaging Triage Group and how to contact the study team through My Health***e***Vet Secure Messaging.

Operationally, both Veterans and the research team may have training needs, including training on use of My Health***e***Vet Secure Messaging. These learning needs should be identified as part of standard operating procedures for the study before the study is submitted to the IRB of Record. Veterans and staff may need to be provided with training on the use of Secure Messaging by the Research Staff and/or the local VA Facility My Health***e***Vet Coordinator.

10. If a Veteran sends a complaint about the research study through My Health*e*Vet Secure Messaging, does it require reporting to the IRB of Record or is there a special reporting system?

Complaints sent by a Veteran thru My Health*e*Vet Secure Messaging are evaluated in the same way as any complaint received from a VA subject in a VA research study. The Investigator or Research Team member must refer to local Human Research Protection Policy procedures to determine when the complaint is to be reported to the IRB of Record for the specific study.

11. What happens if a VA research team member receives a Secure Message from a Veteran that is intended for the Veterans' health care team?

Secure Messages can be reassigned to another Secure Messaging Triage Group or individual using the Internal Healthcare Team Communications Box. Instructions on how to reassign a Secure Message can be found on the My Health*e*Vet Product Website on the VA Intranet. If a VA research team member receives a Secure Message from a Veteran that was intended for the Veteran's health care team, it must be properly reassigned to the appropriate Secure Messaging Triage Group or individual to ensure delivery to the intended recipient.

12. How should communication with VA subjects via My HealtheVet Secure Messaging be documented? What if a VA research study has a Certificate of Confidentiality?

Secure Messages to and from VA subjects, as part of a VA approved study, are considered part of the investigator records that must be retained as required by VHA's Record Control Schedule 10-1. VA researchers are strongly encouraged to routinely save a copy of all messages sent and received using My Health*e*Vet Secure Messaging since messages are only available for display for one year.

Some studies, however, have a Certificate of Confidentiality. A Certificate of Confidentiality (CoC) is issued for applicable Department of Veterans Affairs (VA) research by several Department of Health and Human Services (DHHS) agencies to protect research subjects by preventing investigators and institutions from being forced or compelled to release identifiable information on research subjects. It allows the investigator and others who have access to research records to refuse to disclose identifying information on research subjects in any civil, criminal, administrative, legislative, or other proceeding, whether at the federal, state, or local level. The CoC helps to minimize risks by adding an additional level of protection for maintaining the privacy and confidentiality of research subjects in a VA study. Current ORD policy in VHA Handbook 1200.05, Paragraph 21 states that for studies with a Certificate of Confidentiality that do not involve a medical intervention (e.g., observational studies, including interviews and questionnaire studies), no annotation may be made in the health record. Therefore, if the VA study does not involve a medical intervention, My Health*e*Vet Secure Messaging communications cannot be saved as a TIU note in the subject's VHA health record. In this case, the VA research team should document the communication in the investigator's research file.

For studies that do involve a medical intervention, My Health*e*Vet Secure Messaging allows VA staff to save all or part of a Secure Message or set of related messages (message thread) that is deemed clinically relevant as a TIU note in CPRS.

For studies that involve a medical intervention but that also have a CoC, ORD policy states that any details that would affect the subject's clinical care are to be included in progress notes. The VA Principal Investigator (PI) is responsible for determining which My Health*e*Vet Secure Messaging communications will be documented in CPRS. If the Secure

Messaging communication involves a subject safety issue as determined by the VA PI, it must be documented as a TIU note in CPRS and follow all other reporting requirements as dictated by facility, regional (state) and national regulations, including verbal and written communication to patients, facility operations, and local authorities. Subject safety is always the first priority and should never be compromised by withholding information needed by a VA research subject's health care team

13. What are the business rules for the timeliness of response to a Veteran Secure Message?

It is very important that Secure Messages are responded to within a timely manner and marked as complete within the Secure Messaging application. Secure Messages must be marked as complete within three (3) federal business days or they will escalate within the Secure Messaging application. Secure Messages are completed by the user by changing the message status to Complete. Secure messaging response time will be stated clearly to all participants when the participant enrolls in the study.

14. How can I learn more about My Health*e*Vet Secure Messaging?

The My Health***e***Vet Product website on the VA intranet provides a variety of resources to learn more about how to use My Health***e***Vet Secure Messaging.

You can also email MHVSecureMessagingFieldQuestions@va.gov with specific questions about accessing and using Health***e***Vet Secure Messaging.

References:

- VHA Handbook 1200.05: Requirements for the Protections of Human Subjects in Research
- VHA Directive 1605.01: Privacy and Release of Information
- VA Handbook 6500: Information Security Handbook