

Health Partner Gateway Reference Guide for Health Partners

Document Exchange

April 14, 2023

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Introduction & Background

Please refer to the Health Partner Gateway Reference Guide for Health Partners Introduction and Common Functions for an overview of HPG.

This document is intended for **HPG Health Partners** that have been assigned roles providing them access to the **Document Exchange** area of HPG. This document will address the following areas in HPG:

- Document Status Posted and Processed Documents
- Send Document
- Sentbox
- Inbox
- CSR Upload Documents

Document Exchange

The Document Exchange area of HPG enables you to view incoming notifications and documents from CHRIS, send and/or upload documents to CHRIS (to document management system) as well as monitor the status of sent, uploaded, and received documents.

Не	alth Partnei	r Gateway							
Home	Document Exchange	Referral Management	Offer Management	Client View	Invoice Entry	Administration	Reports	Options	Help
Title: Messag	Send Document Sentbox	te ger supports Internet Ex	plorer 8 (IE8). Internet I	Explorer 9 will b	e supported only u	intil October 14 201	5. Users sho	ould move to	IE 11 or h
Status:	Inbox CSR Upload Document	per 14 2015, IE10 Supp	ort until December 2015						

Document Exchange is accessible by Health Partner users that have been assigned the following roles in HPG:

- Document Viewer
- Document Sender
- Document Receiver



Inbox

This page is accessible by HPG users with Document Receiver, Document Viewer and Document Sender role.

He	alth Partner	Gateway
Home	Document Exchange	Referral Management
Title: Messag	Send Document Sentbox	te ger supports Internet E
Status:	Inbox CSR Upload Document	er 14 2015, IE10 Supp s

The Inbox displays a log of the documents/notifications that are received by a particular HPG Team. The logged in user must be a member of the receiving HPG team to view these documents/notifications.

The types of documents that are received and displayed in the Inbox varies based on the logged in user's role and the team that user is associated with.

The default view of the Inbox page:

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He	alth Part	n	er Gateway					User	: lisa.anderson-steliz Version 3.12.0.8188
									Logout
Home	Document Excha	ange	e Offer Management Clien	t View Invoice En	try Admini	stration Reports Options Help			
Inbo	x								
Sea	arch Criteria - Sys	sten	Default 🚺						
• Sea	arch Results								
3 P	ause Last refre	esh:1	15-Jun-2022 04:10 PM 2					5 unvicess 6	Dawmana
	Document Type		Description	Tracking ID Urge	Status	4 From Team *	To Team	Posted	Processed
0	Frequency Updat	¥	BRN:610643601, Offer ID:19	ca44	Processed	Central East LHIN - CHRIS Mailbox	Central East LHIN - SC SAINT ELI	08-Jun-2022 11:35 PM EDT	15-Jun-2022 4
0	Service Referral	¥	BRN:610643601, Offer ID:19	17af	Posted	Central East LHIN - CHRIS Mailbox	Central East LHIN - SC SAINT ELI	08-Jun-2022 11:33 PM EDT	
	Frequency Updat	¥	Other Updates, BRN:610643	1f0c	Posted	Central East LHIN - CHRIS Mailbox	Central East LHIN - SC SAINT ELI	08-Jun-2022 11:31 PM EDT	
0	Service Referral	¥	BRN:610643601, Offer ID:19	683f	Processed	Central East LHIN - CHRIS Mailbox	Central East LHIN - SC SAINT ELI	08-Jun-2022 11:31 PM EDT	15-Jun-2022 4

- 1. Search Criteria: expands to provide filters/tools to narrow search results list
- 2. Last refresh: displays the date/time the Inbox was last refreshed (auto-refresh occurs every 60 seconds)

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3. **Pause** button: disables the HPG Inbox auto-refresh; when auto-refresh is turned off (Pause is on), the sort will remain intact; when auto refresh is turned on (Pause is off), the sort will return to the default sort; click Resume to turn off the Pause



- 4. Search Results list: displays the list of search results based on the current search criteria (default)
- 5. **Unprocess**: If a message is **Processed**, it sets the selected message status back to **Posted**. Processed Date is set back to empty. This button is only available to users with the 'Document Receiver' role.
- 6. Download: disabled if no document selected from the Inbox; available to users with the Document Receiver role; allows user to download one or multiple (max 10) documents; when multiple documents are selected, all the files are saved in a zip file. Unspecified documents cannot be downloaded along with other document types. (Single document downloads can be done by clicking on the download icon beside the Description link see #4 above).

Search Criteria

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The Search Criteria tool allows you to apply search filters to find a specific document/notification or group of documents/notifications. Search Criteria is available in both the Inbox and Sentbox. Use the Search Criteria to perform ad hoc searches.

To open the Search Criteria tool, expand the Search Criteria bar by clicking on it:





Note that 'Search Criteria' is hyphenated with 'System Default'. This indicates that the current search criteria settings are set to the system default.

System Default Search Criteria

The System Default search criteria filters are set up as follows:

earch Criter	ria				Saved Searches
* Search Name:	System Default				Add Search
* Date Range:	Last 30 Days		÷		Default
* From Date:	17-May-2022 12:00 AM		* To Date:	16-Jun-2022 11:20 AM	Saved Search Name Search
From Team:		p	To Team:		 System Default
Document Type:	18 of 18 selected	*	* Delivery Status:	3 of 3 selected	
* Status:	2 of 2 selected	141	Tracking ID:		
			* Port	Postod (Nowast Oldast)	

- Date Range: Last 30 Days
- From Date: Current Date and Time minus 30 days (Time 12:00AM)
- To Date: Current Date and Time
- No filter on From Team or To Team
- Document Type: 'All'
- Delivery Status: 'All'

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- Status: 'All'
- Tracking ID empty
- Description empty
- Sort: Posted (Newest to Oldest)

The Search Results list below the Search Criteria is based on the filters set above:

lealth Partr	er Gateway					User	lisa.anderson-s
realerrater	ier oucenuj						Version 3.12.0.8
							Log
ne Document Exchange	ge Offer Management Clien	View Invoice Entr	y Adminis	stration Reports Options Help			
box							
Search Criteria - Syste	m Default						
Saarch Basulte							
Search Results							
Pause 1 ast refresh	15- Jun-2022 04-10 PM						
Fause Last reliest	10-0011-2022 04.10 FM						
						Unprocess	Download
Document Type	Description	Tracking ID Urge	Status	From Team *	To Team	Posted	Download Processed
Document Type Frequency Updat	Description BRN:610643601, Offer ID:19	Tracking ID Urge	Status Processed	From Team * Central East LHIN - CHRIS Mailbox	To Team Central East LHIN - SC SAINT EL	Posted 08-Jun-2022 11:35 PM EDT	Processed
Document Type Frequency Updat Service Referral	Description BRN:610643601, Offer ID:19 BRN:610643601, Offer ID:19	Tracking ID Urge ca44 17af	Status Processed Posted	From Team * Central East LHIN - CHRIS Mailbox Central East LHIN - CHRIS Mailbox	To Team Central East LHIN - SC SAINT EL Central East LHIN - SC SAINT EL	Posted 08-Jun-2022 11:35 PM EDT 08-Jun-2022 11:33 PM EDT	Download Processed 15-Jun-2022 *
Document Type Frequency Updat Service Referral Frequency Updat	Description BRN:610643601. Offer ID:19 BRN:610643601. Offer ID:19 Other Updates, BRN:610643	Tracking ID Urge ca44 17af 1f0c	Status Processed Posted Posted	From Team Central East LHIN - CHRIS Mailbox Central East LHIN - CHRIS Mailbox Central East LHIN - CHRIS Mailbox	To Team Central East LHIN - SC SAINT EL Central East LHIN - SC SAINT EL Central East LHIN - SC SAINT EL	Posted 08-Jun-2022 11:35 PM EDT 08-Jun-2022 11:33 PM EDT 08-Jun-2022 11:33 PM EDT 08-Jun-2022 11:31 PM EDT	Download Processed 15-Jun-2022 #

Saved Searches

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Each user who has access to the HPG **Inbox** has the ability to customize and save up to 5 sets of search criteria that can be used as desired. These 5 Saved Searches are in addition to the system default search.

Users can indicate which of their Saved Searches or System Default Search they want to use as their default search criteria when they access the HPG Inbox. For all users, the system default search shall be their default search until they specify otherwise.

To create a new Saved Search:

1. Click on the 'Add Search' button found in the Saved Searches box:



earch Crite	eria					Saved Searches
Search Name:	System Default					Add Search
* Date Range:	Last 30 Days	~				Default
* From Date:	17-May-2022 12:00 AM		* To Date:	16-Jun-2022 11:33 AM		Saved Search Name Search
From Team:			 To Team:		a.	

Search Name:						Add Search
* Date Range:	Today ~		+			Default
* From Date:	16-Jun-2022 12:00 AM		* To Date:	16-Jun-2022 11:34 AM		Saved Search Name Search
From Team:		μ	To Team:		P	System Default
Document Type:	18 of 18 selected		* Delivery Status:	3 of 3 selected	When the A system:	dd Search button is selected, the
* Status:	2 of 2 selected		Tracking ID:		1. Resets th	e Search Criteria Field t Search Name
Description:			* Sort:	Posted (Newest - Oldest) ~	3. Pauses th	e auto-refresh and disables the
Search Sa	ave Export				Resume but 4. Search Re	ton esults list is cleared
arch Results						

2. Complete the Search Criteria fields/filters – the '*' indicates mandatory fields

This is an example:

Search Name: * Date Range: * From Date:	New Service Offers Today 16-Jun-2022 12:00 AM	Mandatory fields (*) musi * To Date:	t be completed 16-Jun-2022 11:34 AM	Add Se Default Search Saved Search Name
From Team:	This is a smart lookup field Central East LHIN - CHRIS Mailbox	P To Team:	This is a smart lookup field	System Default
Document Type: * Status:	18 of 18 selected 2 of 2 selected	* Delivery Status: Tracking ID:	3 of 3 selected	

3. Click 'Save' and the new Search Criteria can be found in the Saved Searches list

xoo							
Search Criteria - Ne	w Service Offers *						
Search Crite	ria						Saved Searches
* Search Name:	New Service Offers						Add Sea
* Date Range:	Today	~					Default
* From Date:	16-Jun-2022 12:00 AM			* To Date:	16-Jun-2022 11:40 AM		Saved Search Name Search
From Team:			p.	To Team:			
	Central East LHIN - CHRI	S Mailbox			Central East LHIN: SC SAINT ELIZABET HEALTH CARE	н в	 System Default
							New Service Offers

To make the newly created Search Criteria your default search criteria, select the radio button beside it:

- The Search Criteria name will appear at the top of the page to indicate that is the Search Criteria being used
- You can repeat the process up until you have 5 custom Saved Searches (not including the



System Default)

• To execute a Saved Search, just click on the Saved Search Name and the Search Criteria will populate

To modify an existing Saved Search:

- Click on the Saved Search Name
- Modify the fields and filters you need to change and click Save

To remove/delete a Saved Search:

• Click the 'x' button beside the Saved Search Name and remove it

Export Search Results

The Export button in the Search Criteria allows search results to be exported to an Excel file. This button is available to users with the Document Receiver, Document Sender, or Document Viewer roles.

Search Criteria -	System Default			
- Search Criteria-				
* Search Name:	System Default			
* Date Range:	Last 30 Days			
* From Date:	27-Jan-2013 12:00 AM		* To Date:	26-Feb-2013 03:58 PM
From Team:		p	To Team:	
* Document Type:	5 of 5 selected	٥	* Delivery Status:	3 of 3 selected
* Status:	2 of 2 selected	٥	Tracking ID:	
Description:			* Sort:	Posted (Newest - Oldest)
Search	Save Export			

When you click the Export button, you will be prompted to 'Open' or 'Save' the Excel spreadsheet.





Search Results

The search results display results based on the Search Criteria filters selected:

Search Results	Search Results											
Resource	Last refresh: 12-Mar,2013 11:00 A	мс	d	е	f	g	h	Download				
Document Ty	pe Description	Tracking ID	Urgent	Status	From Team	To Team	Posted	Processed				
E Service Referral	BRN: 104845, Offer ID: 1005	4 <u>11</u> e5da		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 3:13 PM EST					
Service Offer	<u> <u>Urgent Offer ID:1005411</u> </u>	f0ad	Yes	Processed	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 3:13 PM EST	12-Mar-2013 10:31 AM EL				
Service Referral	BRN:101251. Offer ID:1005	410-Up 9cac		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 2:07 PM EST					
Service Referral	BRN:101251. Offer ID:1005	4 <u>10</u> c381		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 11:22 AM ES					
Unspecified		<u>526 (2)</u> a627	Yes	Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 11:11 AM ES					
🔲 Unspecified	<u> </u>	99ac		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 9:57 AM EST					
Frequency Upd	late 🛓 BRN: 102705	aa9a		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	06-Mar-2013 10:16 AM ES					
Frequency Upd	late 🛃 BRN: 102705	4b7a		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	06-Mar-2013 10:16 AM ES					

Document Type: See list of available document types below

Description: Each document type has a specified document description format that is displayed. Depending on the document type, it may include client's BRN, service offer ID, regular or urgent message and type of communication (e.g., referral package, external communication etc.). Beside each Description link there is a download icon:

Document Type	Description	Tracking ID	Urgent	Status	From Team
Client Update Noti	<u> </u>	0c16		Posted	Central West CCAC - CHRIS Mailbo:
Client Update Noti	▲ New Client Assessment	6bc9		Processed	Central West CCAC - CHRIS Mailbo:

Click on the icon to download that one single document.

Tracking ID: the last 4 characters of the 32-character Tracking ID assigned to every message/notification **Urgent**: Yes, if user who sent the message checked off the Urgent box (blank if not urgent) **Status**: either Pacted or Processed

Status: either Posted or Processed

From Team: prefixed with the organization the team belongs to

To Team: prefixed with the organization the team belongs to

Posted: date/time stamp of when the message got posted to Inbox

Processed: date/time stamp when the message was opened/viewed/ downloaded



Document Types

Document/Notification Type	Description
Unspecified	Any document type that is received that is not generated in or sent out of CHRIS
Service Offer	An offer from an organization to a Provider to deliver services to a client
Service Referral	Client information details sent to a Provider from an organization when a service offer has been accepted
Frequency Update	Change/update to client's service frequency
E&S Order	Equipment and Supply orders for vendors
BR – PS	Billing reconciliation file for purchased services
BR – E&S	Billing reconciliation file for equipment and supplies
ODB – Notif	Ontario Drug Benefit notification received by Pharmacy HPG users
PR Response	Provider Report Response – response from CHRIS Automated Provider Reports – receive as PXML file
Service Offer – Email Notification	Notifies provider team that an email has been sent to provider user(s) to let them know there is an offer waiting for a response in HPG
Client Update Notification	May either be Referral Package notification or a Provider Notification



Client Information	External Communication Package – PDF document containing client documents and/or notes
Outcome Based Pathway Notification	Outcome based pathway notification
Outcome-Based RA-PS	Outcome based pathway notification
Organization Delegation	Notification sent when a CHRIS Admin delegates or undelegates a local organization to manage their own administrative functions (Self User Management feature)
Adjustment Report – Purchased Services	If HCCSS has negotiated a rate change with the Vendor/Provider that is effective in the past, the Rate Adjustment Feature in the Utilities area of CHRIS Finance is used
Primary Care Patient Activity Report	Summary report generated for and sent to a selected Primary Care Group based on a selected list of events (i.e., Admission to HCCSS, Client on Hold, etc.) occurring from a specific start date

Document Status

Documents and notifications in Document Exchange (Inbox and Sentbox) can be in one of two statuses:

- Posted
- Processed

	and Cabaura					User	: lisa.anderson-s
lealth Parth	her Gateway						Version 3.12.0.
							Lo
ne Document Exchange	ge Offer Management Clien	t View Invoice En	try Adminis	stration Reports Options Help			
box							
JOA							
Search Criteria - Syste	em Default						
Course Desults							
Search Results							
Search Results	-45. Jun 2022 04:40 BM						Concerna .
Search Results Pause Last refresh	h:15-Jun-2022 04:10 PM					Chargess	Download
Search Results Pause Last refresh Document Type	h:15-Jun-2022 04:10 PM Description	Tracking ID Urge	Status	From Team =	To Team	Entercess	Downcard
Search Results Pause Last refresh Document Type Frequency Updat	h:15-Jun-2022 04:10 PM Description	Tracking ID Urge ca44	Status Processed	From Team ≜ Central East LHIN - CHRIS Mailbox	To Team Central East LHIN - SC SAINT EL	Ditaincess Posted 08-Jun-2022 11:35 PM EDT	Drownsad Processed 15-Jun-2022
Search Results Pause Last refresh Document Type Frequency Updat Service Referral	Description	Tracking ID Urge ca44	Status Processed Posted	From Team ≜ Central East LHIN - CHRIS Mailbox Central East LHIN - CHRIS Mailbox	To Team Central East LHIN - SC SAINT EL Central East LHIN - SC SAINT EL	Posted Posted 08-Jun-2022 11:35 PM EDT 08-Jun-2022 11:33 PM EDT	Download Processed 15-Jun-2022 -
Search Results Pause Last refrest Document Type Frequency Updat Service Referral Frequency Updat		Tracking ID Urge ca44 17af 1f0c	Status Processed Posted Posted	From Team ≐ Central East LHIN - CHRIS Mailbox Central East LHIN - CHRIS Mailbox Central East LHIN - CHRIS Mailbox	To Team Central East LHIN - SC SAINT EL Central East LHIN - SC SAINT EL Central East LHIN - SC SAINT EL	Posted Posted 08-Jun-2022 11:35 PM EDT 08-Jun-2022 11:33 PM EDT 08-Jun-2022 11:31 PM EDT	Download Processed 15-Jun-2022 -

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Posted

The status of 'Posted' means that the document has been received in the recipient team's **Inbox** and it has yet to have action taken on it – whether it is opened/viewed or downloaded.

HPG will display the date and time a notification/document reached or got 'posted' to HPG.

Processed

The status of 'Processed' means that the document has been retrieved - either opened/viewed or downloaded - by the recipient team.

The date and time will populate the Processed field when that document has had action taken on it.

A document/notification can be processed more than once, however, the date/time stamp from the original processing will remain.

Unprocessed

Users who have been assigned the 'Document Receiver' role now have the ability to reverse the Processed status (unprocess it) and leave it back to just being Posted. To unprocess a document/notification:

- Select the document(s)/notification(s) you would like to unprocess by putting a checkmark in the box beside it
- By selecting the document(s), it will then make the 'Unprocess' button available for selection. Click on Unprocess



Health P	artn	er Gateway					Use	r: lisa.anderson- Version 3.12.0.
								Lo
lome Document	Exchang	e Offer Management Clien	View Invoice En	ntry Admini	stration Reports Options Help			
nbox								
Search Criteria	a - Syster	n Default						
Search Result	5							
Pause Las	st refresh:	15-Jun-2022 04:13 PM					Unprocess	Download
_ Document	Туре	Description	Tracking ID Urge	Status	From Team	To Team	Posted	Processed
Frequency	Upda 🛓	BRN:610643601, Offer ID:190	ca44	Processed	Central East LHIN - CHRIS Mailbox	Central East LHIN - SC SAINT EL	08-Jun-2022 11:35 PM EDT	15-Jun-2022
Service Re	ierral 🛓	BRN:610643601, Offer ID:19	17af	Posted	Central East LHIN - CHRIS Mailbox	Central East LHIN - SC SAINT EL	08-Jun-2022 11:33 PM EDT	
Frequency	Updat 🛓	Other Updates, BRN:6106436	1f0c	Posted	Central East LHIN - CHRIS Mailbox	Central East LHIN - SC SAINT EL	08-Jun-2022 11:31 PM EDT	
Service Re	ferral 👱	BRN:610643601, Offer ID:190	683f	Processed	Central East LHIN - CHRIS Mailbox	Central East LHIN - SC SAINT EL	08-Jun-2022 11:31 PM EDT	15-Jun-2022

The selections are now Unprocessed:

Health Partner G	ateway				User	: lisa.anderson-s Version 3.12.0.8
Home Document Exchange Offer	Management Client View Invoice	Entry Adminis	stration Reports Options Help			Lo
Inbox	management onent view involu	Entry Adminis	station reports options help			
Search Criteria - System Default						
Search Results						
Pause Last refresh:15-Jun-2	022 04:14 PM					Download.
_ Document Type D	escription Tracking ID U	rge Status	From Team *	To Team	Posted	Processed
Frequency Updat BRN:61	10643601, Offer ID:19(ca44	Posted	Central East LHIN - CHRIS Mailbox	Central East LHIN - SC SAINT ELI	08-Jun-2022 11:35 PM EDT	
□ Service Referral 🛓 BRN:61	10643601, Offer ID:19(17af	Posted	Central East LHIN - CHRIS Mailbox	Central East LHIN - SC SAINT ELI	08-Jun-2022 11:33 PM EDT	
🗆 Frequency Updat 🞍 Other L	Ipdates. BRN:6106436 1f0c	Posted	Central East LHIN - CHRIS Mailbox	Central East LHIN - SC SAINT ELI	08-Jun-2022 11:31 PM EDT	
□ Service Referral BRN:61	10643601, Offer ID:19(683f	Processed	Central East LHIN - CHRIS Mailbox	Central East LHIN - SC SAINT ELI	08-Jun-2022 11:31 PM EDT	15-Jun-2022



The following Document Types cannot be unprocessed:

- Service Offer
- ODB Notification
- PR Response
- SO Email Notification
- Billing PS
- Billing E & S
- CSR Upload Document
- Organization Delegation Notification



Retention Periods

Posted and Processed documents are only retained inside HPG for a limited period of time. HPG is not meant to be a repository and for security and privacy reasons, information will only be retained for a certain amount of time.

The retention time for POSTED messages has been updated to 30 days. The retention time for PROCESSED messages has been updated to 14 days.

At the top of every hour, the HPG system will automatically perform a 'cleanup' process that removes documents from the system that has exceeded the standard retention periods. Cleared documents will be permanently removed from the **Inbox** and **Sentbox** but will remain in the **Audit Log**.

Users **cannot** manually delete documents from the **Inbox** or **Sentbox** – they must wait until the document has surpassed the retention period.

Open a Document

Click on the Document Description link:

Search Results							
Pause Last refresh:	28-Feb-2013 04:09 PM					Unprocess	Download
Document Type	Description	Track Urgen	Status	From Team	То Теат	Posted =	Processed
Client Update Notification		0c16	Posted	Central West CCAC - CHRIS Mailbo: C	Central West CCAC - HPG-P-01-DO	21-Feb-2013 9:44 AM	
Client Update Notification		6bc9	Processed	Central West CCAC - CHRIS Mailbo: C	Central West CCAC - HPG-P-01-DO	18-Feb-2013 3:56 PM	19-Feb-2013 11:42 AM
Client Update Notification	<u>▶ New Client Assessment</u>	68c1	Posted	Central West CCAC - CHRIS Mailbo: C	Central West CCAC - HPG-P-01-DO	18-Feb-2013 10:17 AM	
Service Referral		c8ec	Processed	Central West CCAC - CHRIS Mailbo: C	Central West CCAC - HPG-P-01-DO	18-Feb-2013 10:13 AM	18-Feb-2013 10:18 AM
Client Update Notification	▲ New Client Assessment	21de	Processed	Central West CCAC - CHRIS Mailbo: 0	Central West CCAC - HPG-P-01-DO	18-Feb-2013 9:50 AM	18-Feb-2013 10:16 Al
Service Referral		a919	Posted	Central West CCAC - CHRIS Mailbo: C	Central West CCAC - HPG-P-01-DO	13-Feb-2013 11:19 AM	
Service Referral	₩ BRN:102554. Offer ID:100284	565e	Processed	Central West CCAC - CHRIS Mailbo: 0	Central West CCAC - HPG-P-01-DO	11-Feb-2013 2:24 PM	13-Feb-2013 10:40 AM
							7 record(s) found

System will open a viewable format of the document/notification and sets the Status to 'Processed'. System will also update the Processed column with the date and time the document was opened.

Send Document

The Send Document screen allows you to send an unspecified document to an organization's HPG inbox. This method may be used to send either client related documents or non-client documents.



For those organizations and Health Partners that have implemented CSR (Client Services Report) Upload – which allows Health Partners to upload client related documents directly into the client's file in CHRIS, that would be the preferred method for sending client-related documents.

To send unspecified documents:

Mouse over **Document Exchange** drop-down menu and select Send Document.

He	alth Partner	Gateway
lome	Document Exchange	Referral Management
Title:	Send Document	e
Messag	Sentbox	ger supports Internet E
Status:	Inbox	per 14 2015, IE10 Sup
	CSR Upload Documents	5

The Send Document page will open:

Health Partr	ner Gateway
Home Document Exchan	ge Referral Management Offer Management Client View Invoice Entry Administration Reports Options Help
Send Docume	
* From:	Provincial LHIN - Altamont Care Community
* To:	Organization Type: All
	Available Teams: * Selected Teams:
	There are more than 200 Teams returned. Please refine filter criteria.
* Message Type:	Unspecified Business Action: New
Urgent:	
* Document:	Choose File No file chosen
Send Cancel	



Complete the following mandatory fields:

From: if you belong to more than one team - select the appropriate team in the drop-down list; or if you belong to one team - the field will auto-populate

To: Contains two search filters - Organization Type and Team Name

• Select LHIN from the Organization Type drop-down menu (default is All):

Send Document					
* From:	Provincial LHIN - Ber	ndale Acres - Long Term Care	Facility		
* To:	Organization Type:	LHIN	~		
	Available Teams: Central East LHIN - Central East LHIN - Central East LHIN - Central East LHIN - Central LHIN - [M] (Central LHIN - [M] C Central LHIN - [M] S	All LHIN Provider Vendor Pharmacy LTCH Hospital PublicSchool PrivateShool Other Community Service Agency Retirement Home Assisted Living Residence Residential Hospice	ox		
* Message Type:	Unspecified	Supportive Housing Unit	tion:		
Urgent:		Primary Care Group			
* Document:	Choose File No file	Provincial Health Partner EMS	-		

Health Partner users can only send documents to a LHIN – not to any other organization type.

- Select the **Team Name** directly from the list of **Available Teams** or perform a search in the **Team Name** smart look up field
- To move an **Available Team** to the **Selected Team**, highlight the name of the team and click the right arrow



Send Docume	ent
* From:	Provincial LHIN - Bendale Acres - Long Term Care Facility
* To:	Organization Type: LHIN Team Name: CE
	Available Teams: * Selected Teams: Central East LHIN - IMI CE LHIN CE LHIN
	Central East LHIN - [M] Subrogation - CE Central East LHIN - [M] Subrogation - CE Central LHIN - [M] (M)Central MMSS Central LHIN - [M] (M)Central MMSS Central LHIN - [M] Contact Centre Central LHIN - [M] Service Ordering
* Message Type:	Unspecified Business Action: New
Urgent:	
* Document:	Choose File No file chosen
Send Cancel	

Message Type: select the appropriate **Message Type** option available - options will depend on the Team the user belongs to:

- For Service Provider User (user who belongs to a Service Provider Team):
 - 1. Unspecified for any non-specific document type (any format)
 - 2. Billing PS for when billing/invoice files are being sent (and the billing is not being sent via Manual Invoice Entry)
 - 3. CSR Upload Document option available if provider is using CSR Upload



- For **Equipment and Supplies Vendor** User (user who belongs to a E&S Vendor Team):
 - 1. Unspecified for any non-specific document type (any format)
 - 2. Billing E&S for when billing/invoice files for equipment and supplies are being sent (and the billing is not being sent via Manual Invoice Entry)
- For all other **Local Organizations** (Community Service Agency, Assisted Living, Hospice, etc.) and **Provincial Teams** (Hospitals, LTCH, Pharmacies):



1. Unspecified – for any non-specific document type (any format)



Document: click Choose File and browse your local drive to attach the document you are sending



Once attached, the document name will appear in the **Document** field, see example below:

	_	
* Document:	Choose File	Test Document.pdf

Only one document can be sent at a time - multiple files can be sent in a .zip folder.

Optional Fields:

• Select the appropriate option in the **Business Action** field:

New 🗸
New
Update

 Select urgent if required (optional field) by adding a checkmark to the Urgent box – this will indicate in the recipient's HPG Inbox that the file is Urgent (will be indicated with a red checkmark)

Urgent: 🔽



Once all the fields are completed, click **Send** to send the document to the chosen recipient:



A Document Submission confirmation window will display, click OK:



Sentbox

The HPG Sentbox displays a log of the documents that are sent by a particular HPG team. The logged in user must be a member of the sending HPG team to view these records as well as have one of the following roles assigned:

- Document Receiver
- Document Viewer
- Document Sender

External users (i.e., health partner users) can view the following types of documents in the Sentbox:

- Unspecified an unspecified file
- Billing PS Purchased Services billing file
- Billing E&S Equipment and Supplies billing file



 CSR Upload Document – Client Service Report uploaded document sent by a service provider user

From the Document Exchange drop-down menu, select Sentbox.

He	alth Partner Gateway
Home	Document Exchange Referral Management
Sol	Send Document
Sei	Sentbox
	Inbox
	CSR Upload Documents ncial LHIN - Bendale

The Sendbox page will open:

Ligalth Dartney	- Cataway								User lisa anderson-
Health Partner	Gateway								Version 3 12 0.820
									Lousy
Home Document Exchange	Referral Management Offer Managemen	at ClientView Invoice	Entry Admini	istration Re	ports Options Help	P I			
Sentbox									
Search Criteria									
 Search Results 									1
									Recall
- Document Type	Description	Tracking ID	Urgent	Status	From User	From Team	To Team	Posted +	Processed
Unspecified	Test Document pdf.	f949	Yes	Posted	lisa anderson-ce	Provincial LHIN - Altamont Care Community	Central East LHIN - (M) CE LHIN	08-Jul-2022 4:15 PM EDT	
						Page 1 of 1			1 record(4) found

Search Results list provides all results that reflect the Search Criteria default (i.e., all sent items from the last 30 days from all teams, all document types, either posted or processed, with delivery status of either not attempted, delivered, and failed –sorted from newest at the top to the oldest at the bottom).

Search Criteria

To customize your search results, expand the Search Criteria section by clicking on the light blue **Search Criteria** band at the top:





Use the filters to customize your search:

ntbox							
Search Crite	ria						
* Date Range	Today			* To Date: 08, Int 2022 04:20 PM	-		
From Team:	Provincial LHIN: Attamont Care Community			To Team. Central East LHIN - [M] CE	ELHIN	-	
* Document Type:	4 of 4 selected			* Delivery Status:) of 3 selected			
* Status Description	2 of 2 selected.			Tracking ID * Sort Posted (Newest - Oldest)	v		
Search Re	eset						
learch Results							Racall
Document Ty	ype Description	Tracking ID Urgent S	tatus From User	From Team	To Team	Posted -	Processed
Unspecified	Test Document pdf	1949 Yes P	osted lisa anderson-ce	Provincial LHIN - Altamont Care Community	Central East LHIN - [M] CE LHIN	08-Jul-2022 4:15 PM EDT	
			Pag	e 1 of t			T (ecord(s) for

Date Range: default is set to Last 30 days; select the correct date range from the drop-down menu:

* Date Range:	Last 30 Days	*
	Today	
	Yesterday	
	Last 7 days	
	Last 14 Days	
	Last 30 Days	
	Fixed	
	Custom	
	Contraction of the second seco	

From Date and To Date: default current date and time minus 30 days – the **From Date** and **To Date** will automatically reflect the date range selected

• If **Date Range** selected is **Fixed**, the **From Date** and **To Date** will be empty for you to complete:

* Date Range:	Fixed	~		
* From Date:			* To Date:	



If Date Range selected is Custom, select the From Date from the options in the drop-down list, • the To Date will default to Now and current time

* Date Range:	Custom	~			
* From Date:	Now 🗸	hours	* To Date:	Now	×
From Team:	Now Today Yesterday Last 7 Days				

- Other Custom options for From Date are: Today; Yesterday; or Last 7 days
- o Another Custom option for To Date is: Today (specify the time using the Hour and Minute slide bars)

From Team: use the smart look up to filter the Sentbox to only show documents from a selected From **Team**; you can select all teams you are a member of:

From Team:	Provincial LHIN:
	Provincial LHIN: Ballycliffe Lodge
	Provincial LHIN: Orchard Villa - Pickering
	Provincial LHIN: Fairview Lodge
	Provincial LHIN: Hillsdale Estates
	Provincial LHIN: Glen Hill Marnwood
	Provincial LHIN: Reachview Village - Uxbridge
	Provincial LHIN: Thornton View
	Provincial LHIN: Sunnycrest Nursing Home
	Provincial LHIN: Glen Hill Strathaven
	Provincial LHIN: Lakeview Manor
	Provincial LHIN: Fosterbrooke Long Term Care Facility
	Provincial LHIN: Extendicare - Oshawa
	Provincial LHIN: Port Perry Place - Port Perry
	Provincial LHIN: Bon-Air Residence
	Provincial LHIN: Winbourne Park Long Term Care Centre

To Team: use the smart look up to filter the Sentbox to show documents from a selected To Team; one or more teams can be selected:

To Team:	central
	Central East LHIN - [M] CCAC MOH-Reporting
	Central East LHIN - [M] CE LHIN
	Central East LHIN - [M] Central East Placement Mailbox
	Central East LHIN - [M] CMH
	Central East LHIN - [M] HHHS
	Central East LHIN - [M] LHB
	Central East LHIN - [M] LHO
	Central East LHIN - [M] LHPP
	Central East LHIN - [M] LHW
	Central East LHIN - [M] MSU



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Document Type: default to 'All'; user can select a document type to show the selected type only:



Delivery Status: default to 'All'; user can filter for 'Not Attempted', 'Delivered' and 'Failed':



Status: default to All; user can select Posted or Processed:

* Status:	2 of 2 selected	
	Check all 👘 Uncheck all	
	Posted	
	Processed	

Tracking ID: the tracking ID is a 32-character alphanumeric string; to search by the Tracking ID, enter the last 4 characters of the ID:

Tracking ID:	

Description: free text field where you may search by the document description:

|--|--|

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Sort: default to 'Posted (Newest – Oldest); select from the drop-down the primary sort order for the search results to be displayed:



Search: click to review results

Reset: click to reset filters to default settings



Search Results

The **Search Results** list provides results that reflect the filter selections in the Search Criteria. The results details display the same attributes as the Inbox (i.e., Document Type, Description, Tracking ID, Urgent, Status, From Team, To Team, Posted and Processed columns).



There is no download icon beside the document description and there is no option to unprocess a document. Download icon looks like this:

Frequency Update 👱 BRN:102705	4b7a	Posted
-------------------------------	------	--------

You do, however, have the ability to Recall a sent unspecified document.

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Recalling a Document

Unspecified documents that have been sent from the Send Documents screen can be recalled so long as the document is still in **Posted** state in the recipient's Inbox. If the document has been processed (opened, viewed, downloaded), then the recall function is not available for that document.

To recall a document, select the un-processed document you wish to recall by placing a checkmark beside the Document Type in the first column (select one or multiple documents to recall) and click the **Recall** button:

Sentbox									
Search Criteria *									
- Smarch Results									1
									Recall
- Document Type	Description	Tracking ID	Urgent	Status	From User	From Team	To Team	Posted -	Processed
E Unspecified	Test Document pdf	1949	Yes	Posted	lise anderson-ce	Provincial LHIN - Altamont Care Community	Central East LHIN - [M] CE LHIN	08-Jul-2022 4:15 PM EDT	
Document Type Unspecified	Description Test Document pdf	Tracking ID 1949	Urgent Yes	Status Posted	From User lise anderson-ce	From Team Provincial LHIN - Altamont Care Community	To Team Central East LHIN - [M] CE LHIN	Posted = 08-Jul-2022 4 15 PM EDT	Processed

The selected document(s) will disappear from the Search Results list, indicating that it has been successfully recalled.

• You cannot recall a CSR Upload Document or a Billing file – only Unspecified documents can be recalled.

CSR Upload Documents

Providers are able to upload documents to any active client they are providing service for at an organization that has implemented the Client Service Report (CSR) Upload functionality.

In order to do this, the provider user will require a Client Viewer and Document Sender roles assigned to them.

In HPG, CSR Upload Document history is available in 2 areas:

- 3.2 CSR Upload Documents tab in the Community Health Portal (CHP)
- 3.3 Send Documents section of Document Exchange

This section will address the CSR Upload in the **Document Exchange** area of HPG.



CSR Upload from Document Exchange

A Provider User with a **Document Sender** role can access the Send Documents page in Document Exchange (where CSR Upload Documents are sent from). The **Document Viewer** role will give access to the CSR Upload Documents History.

Select Send Documents from the Document Exchange drop-down menu in HPG:



The Send Document page will open:

Send Docume	ent
* From:	Provincial LHIN - Altamont Care Community
* To:	Organization Type: All Team Name:
	Available Teams: * Selected Teams:
	There are more than 200 Teams returned. Please refine
	filter criteria.
* Message Type:	Unspecified Business Action: New
Urgent:	
* Document:	Choose File No file chosen
Send Cancel	

From: drop-down menu will display a list of Provider HPG Teams that the logged Provider User is a member of and is associated with the organization of the selected client. The default **From Team** will display the organization that owns the team followed by the Provider Team name.



- If the user belongs to only one Provider Team associated with the organization of the selected client, then the field is display only (no drop-down list).
- If the user belongs to more than one Provider Team that is associated with the organization of the selected client, then the field is a drop-down list and user must select the Provider Team.

To: select LHIN from the drop-down list for Organization Type. Select the CHRIS Mailbox of the organization that the client belongs to and use the icon to move the organization team from the Available Teams window to the Selected Teams window.

• Alternatively, you can search for the Team Name using the smart look up.

* To: Organization Type: LHIN	Team Name: CE
Available Teams:	* Selected Teams:
Central East LHIN - [M] CE LHIN Central East LHIN - [M] Central East Placement Mailbox Central East LHIN - [M] Subrogation - CE Central East LHIN - [M] TSH Grace Central LHIN - [M] (M)Central MMSS Central LHIN - [M] Central Placement Central LHIN - [M] Contact Centre Central LHIN - [M] Service Ordering	Central East LHIN - [M] CE LHIN

When the CHRIS Mailbox is selected, CSR Upload Document becomes available for selection in the **Message Type** drop-down list. Select **CSR Upload Document**:



Once selected, a **BRN** field will appear. You must enter the BRN of the client you are uploading documents for (no other search parameters are available here) and click **Search**:

* Message Type:	CSR Upload Document		
* BRN:		Search	

If it doesn't find a match, you will see an Error Message. Select Clear Search Result to enter another BRN.

A successful match will result in the **Client Name** and **HCN** displaying for validation and a prompt to select the **Service Delivery Type** pertinent to the document being uploaded.



If you are delivering more than one service type, they will all be listed for you to select. Use the radio button to select the correct Service Delivery Type.

* Message Type:	CS	R Upload Document					
° BRN:	101	251	Clear Search Resu	lit			
Client:	Kim	, Training1	HCN:				
* Service Delivery Type:		Servi	ce Delivery Type 🗢		Provider Assigned Date	Provider Discharged	Status
	0	Outcome-Based Wo	ound - Outcome-Based W	ound -	s 07-Mar-2013		Active
* Document Type:	<	Select>	•				
* Document: Browse							
Send Cancel							

From the **Document Type** drop-down menu, select the Document Type name for the document that will be uploaded.

The Document Type list is pre-determined in CHRIS and each Document Type is set to file at a specific level in DocuShare[®]

Attach the document for upload by clicking on **Choose File** and finding the document in your local folders for upload and click **Send**:

	* Document:	Choose File	Test Document.pdf
Send	Cancel		

A **Confirmation** window will appear, click **Yes** to proceed. At that point, a **Document Submission** message will appear to confirm success upload to HPG.

A record of the uploaded document can be viewed in the **Sentbox** of **Document Exchange** (Provider User must have Document Viewer role assigned to do this).

The CSR Upload document will be **Posted** and **Processed** in the **Sentbox** while the document is still in **Submitted** state in the CSR Upload Document page.



CSR Upload Document History

The **CSR Upload Documents** history maintains a list of all the CSR documents that have been uploaded to DMS/CHRIS and is viewable from.

Mouse over Document Exchange drop-down menu and select CSR Upload Documents:

He	alth Partne	r Gateway
Home	Document Exchange	Referral Management
	Send Document	
	Sentbox.	
	Inbox	
	CSR Upload Documen	its

The **CSR Documents** page will open – the **Search Criteria** will be expanded (default) to display the Document Search Criteria filters:

С	SR Document	5		
•	Search Criteria			
	Document Searc	ch Criteria		
	Document Set:	Recent documents	rical documents	
	From Team:	~		
	From Date:		To Date:	
	Client Last Name:		Client First Name:	
	Uploaded by:		BRN:	
	Service Delivery Type:	-All- 🗸		
	Document Type:	-All- 🗸		
	Status:	-All- 🗸		
	Search Reset			
Þ	Search Results			



The CSR Upload Documents history is separated into two pages:

- Recent documents
- Historical documents

A document becomes a **Historical Document** when a user has selected and archived a **Reviewed** document record from the **Recent Documents** page.

Move a **Reviewed** document record from the **Recent CSR Upload Documents** page to the **Historical Upload Documents** page by clicking on the **Archive** button:

= Searc	ch Results									
Ar	chive						Submitted / Received	Alert: Document Pending Review	In Progress	Reviewed
# 1	BRN	Client Name	Service Delivery Type	Document Type	Update Date/Time	Uploaded By	Actioned By	Actioned Date/time	Status	
1 1	101251	Training1 Kim	Outcome-Based Wound - so	tt CSR upload type	07-Mar-2013 2:18 PM EST	kimberly hanson-provider	The second secon		Received	*
2 0	01251	Training1 Kim	Outcome-Based Wound - so	t CSR upload type	07-Mar-2013 11:48 AM EST	kimberly hanson-provider	Kimberly Hanson	07-Mar-2013 2:00 PM EST	Reviewed	
3 (100072	John Storm	Shift home	~ MG - CCAC File Level	Nev 22-Feb-2013 10:08 AM EST	Max Gromov	Kimberly Hanson	07-Mar-2013 2:01 PM EST	Reviewed	
4 8	100072	John Storm	Shift home	~ MG - CCAC File Level	Nev 22-Feb-2013 10.03 AM EST	Max Gromov	Kimberly Hanson	07-Mar-2013 2:01 PM EST	Reviewed	

CSR Upload Documents Search Results – Recent CSR Upload Documents:

- Default view displays the Recent CSR Upload Documents page (list will display only those documents that have not been selected to be moved to the Historical CSR Upload Documents page)
- The list includes ALL clients that have been uploaded from HPG
- The document records are sorted based on the document upload date from the oldest (at the top) to the newest
- 20 records will display at a time with paging

You can search for a particular **CSR Upload Document** record on the **Recent CSR Upload Documents** page by viewing the **Search Results** list. However, if the list is very long, or you need to find a specific document record, open the **Search Criteria**, and add filters.

Each document uploaded is identified on each line with the following attributes (highlighted in red) and refer to the HPG Provider side information collected during the CSR Upload process:



• BRN

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- Client Name
- Service Delivery Type: as selected by the Provider from the client profile
- Document Type: as selected by the Provider from the drop-down menu
- Upload Date/Time: when document was successfully uploaded
- Uploaded By: the Provider User that uploaded the document

The 3 columns (highlighted in purple) provide information from CHRIS:



- Actioned By: the CHRIS user that has opened or processed/reviewed the document
- Actioned Date/Time: the date and time the above action was taken by the CHRIS user
- Status: the current Status of the document in CHRIS



Each **Status** is colour coded:

Status	Description
Submitted (white)	Indicates that the document has been uploaded to HPG but has not reached DocuShare [®] and CHRIS yet.
	A message is sent to CHRIS to notify that a document has been uploaded in HPG – the message is received in Tasks tab > <u>Provider Reports</u> and in the client record Provider level Details tab > <u>Provider Notifications</u> > <u>Inbound</u> <u>Notification</u>
Received (white)	Indicates that the document has been saved in DocuShare [®] and a link has been created in CHRIS.
Alert: Document Pending Review (pink)	Indicates that a received document has not been viewed/accessed within a specific period of time (time period determined by CHRIS Administrator) and is pending review.
In Progress (yellow)	A document has been opened/viewed/processed and is in the process of being reviewed.
Reviewed (green)	Indicates that the CHRIS user has completed his/her reviewed and has marked the document as reviewed in CHRIS.

The list can be sorted by any of the column names (e.g., you can sort by BRN, Service Delivery Type, Document Type, Upload Date/Time, Uploaded By, Actioned By, Actioned Date/Time and by document Status).

When the status changes to **Reviewed** in HPG, a check box opens in the first column for the Provider user to select the document upload record and move it to the **Historical CSR Upload Documents**. The document upload record will disappear from the **Recent CSR Upload Documents list**.

Historical CSR Upload Documents

• To search for a document upload stored in **Historical CSR Upload Documents**, select the corresponding radio button.





- No history will be displayed upon initially navigating to this screen.
- You must open the Search tool and enter **Search Criteria** and click **Search** before any upload records can be displayed.

If accessing from within a client profile in CHP, the document list will be limited to those document records stored in the **Historical CSR Upload Documents** that have been uploaded for that specific client.

In Document Exchange, the list includes ALL uploaded documents that have been moved to **Historical CSR Upload Documents** (for all clients).

Search Criteria

CSR Document	S		
 Search Criteria 			
Document Sear	ch Criteria		
Document Set:	Recent documents His	torical documents	
From Team:	~		
From Date:		To Date:	
Client Last Name:		Client First Name:	
Uploaded by:		BRN:	
Service Delivery Type:	-All- 🗸		
Document Type:	-All- 🗸		
Status:	-All- 🗸		
Search Reset			
▹ Search Results			

From: drop-down menu will display a list of Provider HPG Teams that the logged Provider User is a member of and is associated with the organization of the selected client. The default **From Team** will display the organization that owns the team followed by the Provider Team name.

- If the user belongs to only one Provider Team associated with the organization of the selected client, then the field is display only (no drop-down list).
- If the user belongs to more than one Provider Team that is associated with the organization of the selected client, then the field is a drop-down list and user must select the Provider Team.



From Date and To Date: the date range fields will default one week from current date and can be changed but cannot exceed the maximum searchable date range of 7 days.

• Both the **From Date** and the **To Date** are free-text fields, however you can choose to use the Calendar widget to select the date you would like to enter in the field.

Complete 1 or more of the following Search Criteria:

Client Last Name: will be populated if in CHP Client profile, otherwise blank field Client First Name: will be populated if in CHP Client profile, otherwise blank field Uploaded by: First and Last name of the Provider User that uploaded the document BRN: enter in the Billing Reference Number Service Delivery Type: defaults to All Document Type: defaults to All Status: IF document set was set to recent docs = defaults to all; IF document set was set to historical document = greyed out

Click **Search** to view the **Search Results**. Click **Reset** to clear the **Search Criteria** (defaults restored and other fields empty).