



Health Partner Gateway Reference Guide for Health Partners

MODULE 2 Document Exchange

Revision Table

Date	Version	Author	Comments
October 4, 2011	1.0	Darlene Patgunarajah	Update to Reference Guide to include functionality from 2010 and 2011 Releases
August 1, 2012	1.1	Darlene Patgunarajah, Kimberly Hanson	Update to include CHRIS 2.0 and 2.1 functionality (addition of Referral Management tab and addition of new sub tabs in Client View (CHP))
March 2013	2.0	Darlene Patgunarajah Kimberly Hanson	Reference Guide divided into multiple modules focusing on different areas/functionalities. Updates to include CHRIS 2.2/ HPG 3.0 release enhancements. Module 2 – Description of functionalities within the Document Exchange area of HPG: Inbox, Sentbox, Send Document & CSR Upload Documents
August 2013	2.1	Darlene Patgunarajah	Section 2.1.4 - Retention periods have been standardized provincially effective August 9, 2013

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1. INTRODUCTION

1.1 Background & Overview

The Health Partner Gateway (HPG) provides a single solution to securely exchange health information between a CCAC and its partners. It was built to interoperate with longer term e-Health initiatives and to enable Health Partner access to client health information held within CCAC tools and applications such as the Client Health and Related Information System (CHRIS).

HPG is deployed with CHRIS and serves as the Health Partner interface for Service Offers, Orders, Billing/Invoicing, and Document Sharing. Since the application was made available in 2007, it has evolved into a robust, integrated application that enables CCACs and Health Partners to communicate and share information in ways that go far beyond the initial applications of one way notifications, services offer responses and equipment/supply orders between CCAC and Services Providers/Vendors.

The HPG is now integrated with document management systems and more intricately with CHRIS to enable more sophisticated methods of information sharing, including the access of client information through the Community Health Portal (CHP) and through Referral Management.

1.2 Overview of Functionality

The HPG is one application, featuring a main area that links to each of the 14 CCACs. Each CCAC has its own secure area for their internal or external partners where information is exchanged.

There are two ways to access HPG:

- Internally - from within the CCAC network, logging in as a CCAC user/CCAC Admin user using Active Directory credentials
- Externally - from outside the CCAC network – accessible via internet – logging in as a Health Partner user.

This reference guide version update will outline the functionalities within HPG for the **External HPG User** – i.e. health partner users (providers, vendors, pharmacies, LTCHs, etc.) that access HPG from outside the CCAC network.

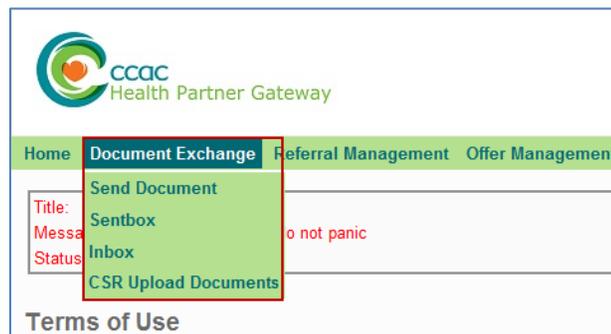
A user's account type, team membership and role assignments determine what that user is able to see and do within HPG.

Summary of functional principles in HPG:

- All communication in HPG occurs between teams, as opposed to between individual users
- A team is always owned by a single CCAC
- A single user can belong to many teams
- A team can have members (users) from other CCACs
- A user can either be a person or a system (such as CHRIS)
- Teams are either designated as a CCAC Team or a Health Partner Team
- Only users set up as CCAC users can be members of CCAC (internal) Teams
- Only users that are set up as Health Partner users can be members of Health Partner Organization (external) Teams

1.3 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.



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

- Document Viewer
- Document Sender
- Document Receiver

The updates to the HPG Inbox in HPG Release 3.0 were in response to numerous enhancement requests received from providers and vendors. After reviewing these requests and determining the business need, several enhancements were made.

1.4 Module 2 Layout

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:

- Section 2: Document Status – *Posted and Processed Documents*
- Section 3: Send Document
- Section 4: Sentbox
- Section 5: Inbox
- Section 6: CSR Upload Documents

Other modules available include:

- Module 1: Introduction to HPG (*available March 2013*)
- Module 3: Offer Management (*available March 2013*)
- Module 4: Community Health Portal (CHP) (*available March 2013*)
- Module 5: Referral Management (*available May 2013*)
- Module 6: Self-User Management (*available May 2013*)

2. DOCUMENT STATUS

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

- Posted
- Processed

2.1.1 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.

Search Results								
Resume		Last refresh: 12-Mar-2013 10:28 AM			Unprocess		Download	
Document Type	Description	Tracking ID	Urgent	Status	From Team	To Team	Posted	Processed
<input type="checkbox"/> Service Referral	BRN-104845_Offer ID:1005411	e5da		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 3:13 PM EST	
<input type="checkbox"/> Service Offer	Urgent Offer ID:1005411	f0ad	Yes	Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 3:13 PM EST	
<input type="checkbox"/> Service Referral	BRN-101251_Offer ID:1005410-Ur	9cac		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 2:07 PM EST	
<input type="checkbox"/> Service Referral	BRN-101251_Offer ID:1005410	c381		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 11:22 AM EST	
<input type="checkbox"/> Unspecified	Copy of Regression 2 2Feb26 (2)	a627	Yes	Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 11:11 AM EST	
<input type="checkbox"/> Unspecified	Physio.pdf	99ac		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 9:57 AM EST	
<input type="checkbox"/> Frequency Update	BRN-102705	aa9a		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	06-Mar-2013 10:16 AM EST	
<input type="checkbox"/> Frequency Update	BRN-102705	4b7a		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	06-Mar-2013 10:16 AM EST	
<input type="checkbox"/> Frequency Update	BRN-102705	8e7e		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Mountsiny Medical-K	06-Mar-2013 10:16 AM EST	

2.1.2 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.

Search Results								
Resume		Last refresh: 12-Mar-2013 10:31 AM			Unprocess		Download	
Document Type	Description	Tracking ID	Urgent	Status	From Team	To Team	Posted	Processed
<input type="checkbox"/> Service Referral	BRN-104845_Offer ID:1005411	e5da		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 EST
<input type="checkbox"/> Service Offer	Urgent Offer ID:1005411	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 EST
<input type="checkbox"/> Service Referral	BRN-101251_Offer ID:1005410-Ur	9cac		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 2:07 PM EST	

2.1.3 Unprocess

Prior to HPG 3.0, when a document was mistakenly 'Processed', there was no way to reverse it to be 'unprocessed'. Consequently, this required careful contingency planning to ensure that documents and notifications did not 'slip through the cracks'

when inadvertently opened by a user who was not responsible for it and no follow-up or further action was taken on it.

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:



Document Type	Description	Tracking ID	Urgent	Status	From Team	To Team	Posted	Processed	
<input checked="" type="checkbox"/>	Service Referral	BRN:104845, Offer ID:1005411	e5da	Processed	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 3:13 PM EST	12-Mar-2013 10:45 AM EST	
<input type="checkbox"/>	Service Offer	Urgent Offer ID:1005411	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 EST
<input type="checkbox"/>	Service Referral	BRN:101251, Offer ID:1005410-Jr	9cac	Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 2:07 PM EST		
<input type="checkbox"/>	Service Referral	BRN:101251, Offer ID:1005410	c381	Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 11:22 AM EST		
<input type="checkbox"/>	Unspecified	Copy of Regression 2 Feb26 (2)	a627	Yes	Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 11:11 AM EST	
<input checked="" type="checkbox"/>	Unspecified	Physio.pdf	99ac	Processed	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 9:57 AM EST	12-Mar-2013 10:52 AM EST	

By selecting the document(s), it will then make the 'Unprocess' button available for selection. Click on **Unprocess**:



To Team	Posted	Processed
Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 3:13 PM EST	12-Mar-2013 10:31 AM EST
Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 3:13 PM EST	12-Mar-2013 10:31 AM EST
Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 2:07 PM EST	

The selections are now Unprocessed:



Document Type	Description	Tracking ID	Urgent	Status	From Team	To Team	Posted	Processed	
<input type="checkbox"/>	Service Referral	BRN:104845, Offer ID:1005411	e5da	Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 3:13 PM EST		
<input type="checkbox"/>	Service Offer	Urgent Offer ID:1005411	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 EST
<input type="checkbox"/>	Service Referral	BRN:101251, Offer ID:1005410-Jr	9cac	Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 2:07 PM EST		
<input type="checkbox"/>	Service Referral	BRN:101251, Offer ID:1005410	c381	Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 11:22 AM EST		
<input type="checkbox"/>	Unspecified	Copy of Regression 2 Feb26 (2)	a627	Yes	Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 11:11 AM EST	
<input type="checkbox"/>	Unspecified	Physio.pdf	99ac	Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 9:57 AM EST		



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

2.1.4 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.

 CCACs can no longer make local decisions on the retention periods for posted and processed documents.

Effective August 9, 2013, the retention time for POSTED messages has been updated to 30 days. The retention time for PROCESSED messages has been updated to 14 days. This was determined by the Health Information Management (HIM) Committee in consultation with the Provincial Privacy Officers.

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 Inboxes and Sentboxes but will remain in the Audit Log – refer to Module 1 document.

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

3. INBOX

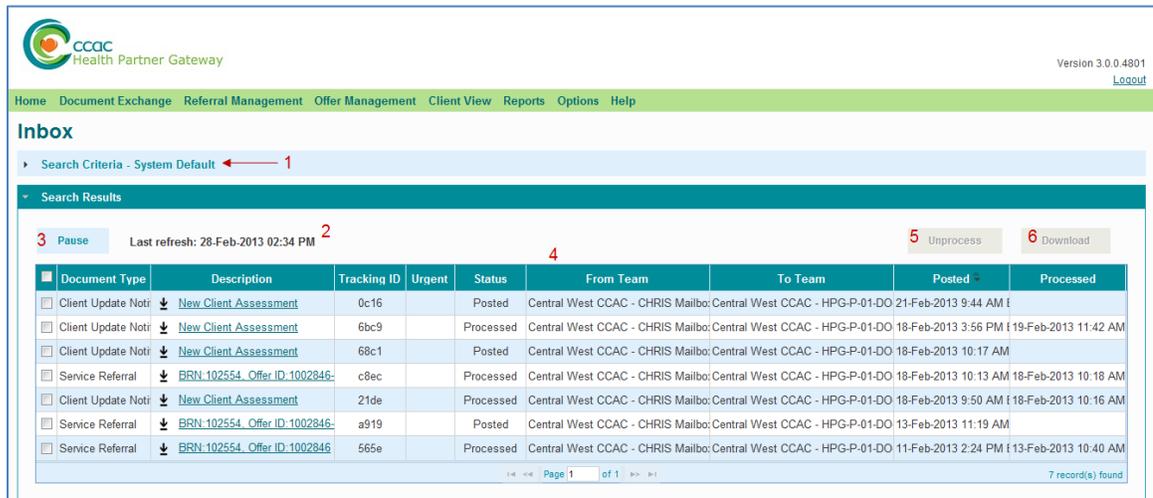
This page is accessible by HPG users with Document Receiver, Document Viewer and Document Sender role.

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.

From the Document Exchange drop down menu, select Inbox.



The default view of the Inbox page:



CCAC Health Partner Gateway

Version 3.0.0.4801
Logout

Home Document Exchange Referral Management Offer Management Client View Reports Options Help

Inbox

Search Criteria - System Default ← 1

Search Results

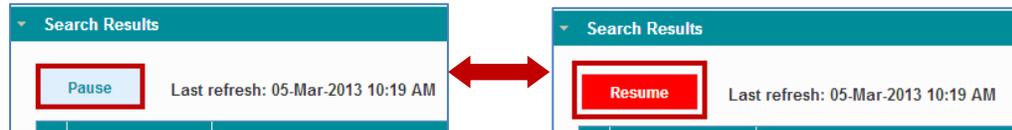
3 Pause Last refresh: 28-Feb-2013 02:34 PM 2

5 Unprocess 6 Download

Document Type	Description	Tracking ID	Urgent	Status	From Team	To Team	Posted	Processed
<input type="checkbox"/> Client Update Noti	↓ New Client Assessment	0c16		Posted	Central West CCAC - CHRIS Mailbo; Central West CCAC - HPG-P-01-DO	Central West CCAC - CHRIS Mailbo; Central West CCAC - HPG-P-01-DO	21-Feb-2013 9:44 AM	
<input type="checkbox"/> Client Update Noti	↓ New Client Assessment	6bc9		Processed	Central West CCAC - CHRIS Mailbo; Central West CCAC - HPG-P-01-DO	Central West CCAC - CHRIS Mailbo; Central West CCAC - HPG-P-01-DO	18-Feb-2013 3:56 PM	19-Feb-2013 11:42 AM
<input type="checkbox"/> Client Update Noti	↓ New Client Assessment	68c1		Posted	Central West CCAC - CHRIS Mailbo; Central West CCAC - HPG-P-01-DO	Central West CCAC - CHRIS Mailbo; Central West CCAC - HPG-P-01-DO	18-Feb-2013 10:17 AM	
<input type="checkbox"/> Service Referral	↓ BRN_102554_Offer_ID_1002846	c8ec		Processed	Central West CCAC - CHRIS Mailbo; Central West CCAC - HPG-P-01-DO	Central West CCAC - CHRIS Mailbo; Central West CCAC - HPG-P-01-DO	18-Feb-2013 10:13 AM	18-Feb-2013 10:18 AM
<input type="checkbox"/> Client Update Noti	↓ New Client Assessment	21de		Processed	Central West CCAC - CHRIS Mailbo; Central West CCAC - HPG-P-01-DO	Central West CCAC - CHRIS Mailbo; Central West CCAC - HPG-P-01-DO	18-Feb-2013 9:50 AM	18-Feb-2013 10:16 AM
<input type="checkbox"/> Service Referral	↓ BRN_102554_Offer_ID_1002846	a919		Posted	Central West CCAC - CHRIS Mailbo; Central West CCAC - HPG-P-01-DO	Central West CCAC - CHRIS Mailbo; Central West CCAC - HPG-P-01-DO	13-Feb-2013 11:19 AM	
<input type="checkbox"/> Service Referral	↓ BRN_102554_Offer_ID_1002846	565e		Processed	Central West CCAC - CHRIS Mailbo; Central West CCAC - HPG-P-01-DO	Central West CCAC - CHRIS Mailbo; Central West CCAC - HPG-P-01-DO	11-Feb-2013 2:24 PM	13-Feb-2013 10:40 AM

Page 1 of 1 7 record(s) found

- 1. Search Criteria** – expands to provide filters/tools to narrow search results list; see [Section 3.2](#);
- 2. Last refresh** – displays the date/time the Inbox was last refreshed (auto-refresh occurs every 60 seconds)
- 3. Pause** button – disables the HPG Inbox auto-refresh; when auto-refresh is turned off (Pause is on), the sort will remain intact – click Resume to turn off the Pause:



When auto refresh is turned on (Pause is off), the sort will return to the default sort

4. **Search Results** list – displays the list of search results based on the current search criteria (default); See [Section 3.3](#)
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).

3.1 Document Types

Document/Notification Type	Description
Unspecified Documents	Any document type that is sent by CCAC that is not generated in or sent out of CHRIS
Service Offer	An offer from a CCAC to a Provider to deliver services to a client.
Service Referral	Client information details sent to a Provider from a CCAC 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
Outcome Based Pathway Notification	Outcome based pathway notification
Outcome-Based RA-PS	Outcome based pathway notification
<i>Organization Delegation</i>	<i>Notification sent when a CCAC delegates or undelegates a local organization to manage their own administrative functions (Self User Management feature)</i>

3.2 Search Criteria

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 ([Section 5](#)). 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 (see next [Section 3.2.1](#)).

3.2.1 System Default Search Criteria

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

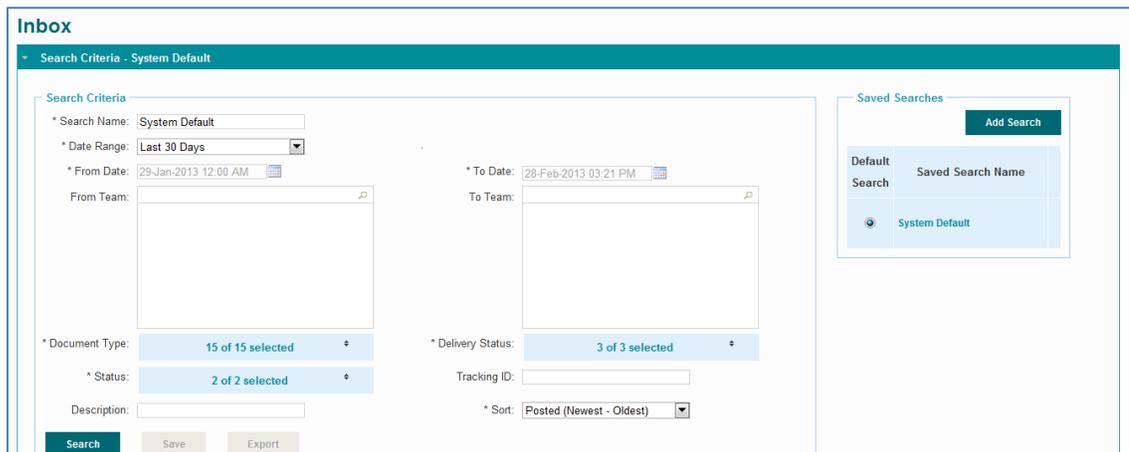
Date Range: Last 30 Days

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



Inbox

Search Criteria - System Default

Search Criteria

* Search Name: System Default

* Date Range: Last 30 Days

* From Date: 29-Jan-2013 12:00 AM

* To Date: 28-Feb-2013 03:21 PM

From Team:

To Team:

* Document Type: 15 of 15 selected

* Delivery Status: 3 of 3 selected

* Status: 2 of 2 selected

Tracking ID:

Description:

* Sort: Posted (Newest - Oldest)

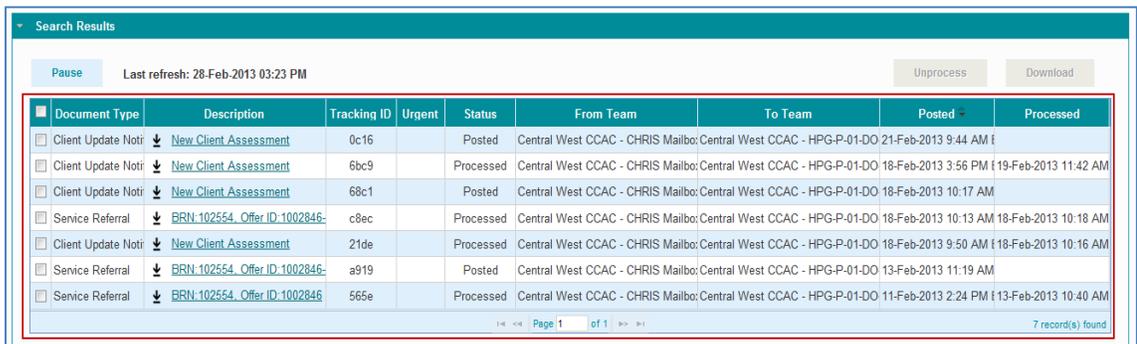
Search Save Export

Saved Searches

Add Search

Default Search	Saved Search Name
<input checked="" type="radio"/>	System Default

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



Search Results

Pause Last refresh: 28-Feb-2013 03:23 PM Unprocess Download

<input type="checkbox"/>	Document Type	Description	Tracking ID	Urgent	Status	From Team	To Team	Posted	Processed
<input type="checkbox"/>	Client Update Noti	New Client Assessment	0c16		Posted	Central West CCAC - CHRIS Mailbo;Central West CCAC - HPG-P-01-DO	Central West CCAC - HPG-P-01-DO	21-Feb-2013 9:44 AM	
<input type="checkbox"/>	Client Update Noti	New Client Assessment	6bc9		Processed	Central West CCAC - CHRIS Mailbo;Central West CCAC - HPG-P-01-DO	Central West CCAC - HPG-P-01-DO	18-Feb-2013 3:56 PM	19-Feb-2013 11:42 AM
<input type="checkbox"/>	Client Update Noti	New Client Assessment	68c1		Posted	Central West CCAC - CHRIS Mailbo;Central West CCAC - HPG-P-01-DO	Central West CCAC - HPG-P-01-DO	18-Feb-2013 10:17 AM	
<input type="checkbox"/>	Service Referral	BRN-102554_Offer_ID-1002846	c8ec		Processed	Central West CCAC - CHRIS Mailbo;Central West CCAC - HPG-P-01-DO	Central West CCAC - HPG-P-01-DO	18-Feb-2013 10:13 AM	18-Feb-2013 10:18 AM
<input type="checkbox"/>	Client Update Noti	New Client Assessment	21de		Processed	Central West CCAC - CHRIS Mailbo;Central West CCAC - HPG-P-01-DO	Central West CCAC - HPG-P-01-DO	18-Feb-2013 9:50 AM	18-Feb-2013 10:16 AM
<input type="checkbox"/>	Service Referral	BRN-102554_Offer_ID-1002846	a919		Posted	Central West CCAC - CHRIS Mailbo;Central West CCAC - HPG-P-01-DO	Central West CCAC - HPG-P-01-DO	13-Feb-2013 11:19 AM	
<input type="checkbox"/>	Service Referral	BRN-102554_Offer_ID-1002846	565e		Processed	Central West CCAC - CHRIS Mailbo;Central West CCAC - HPG-P-01-DO	Central West CCAC - HPG-P-01-DO	11-Feb-2013 2:24 PM	13-Feb-2013 10:40 AM

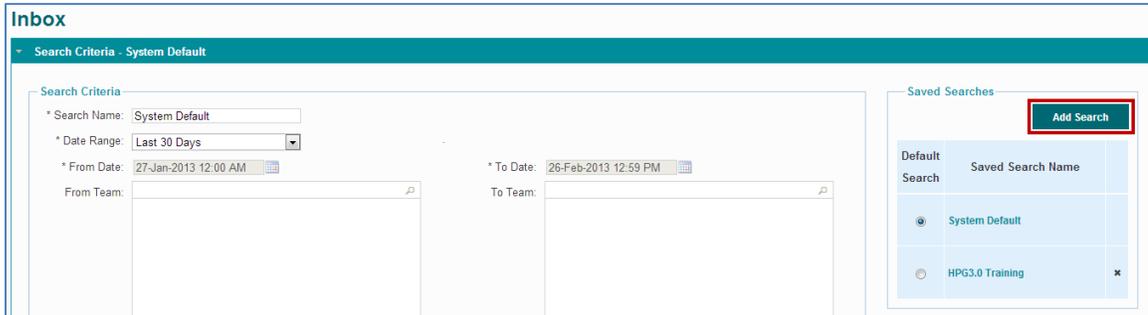
Page 1 of 1 7 record(s) found

3.2.2 Saved Searches

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.

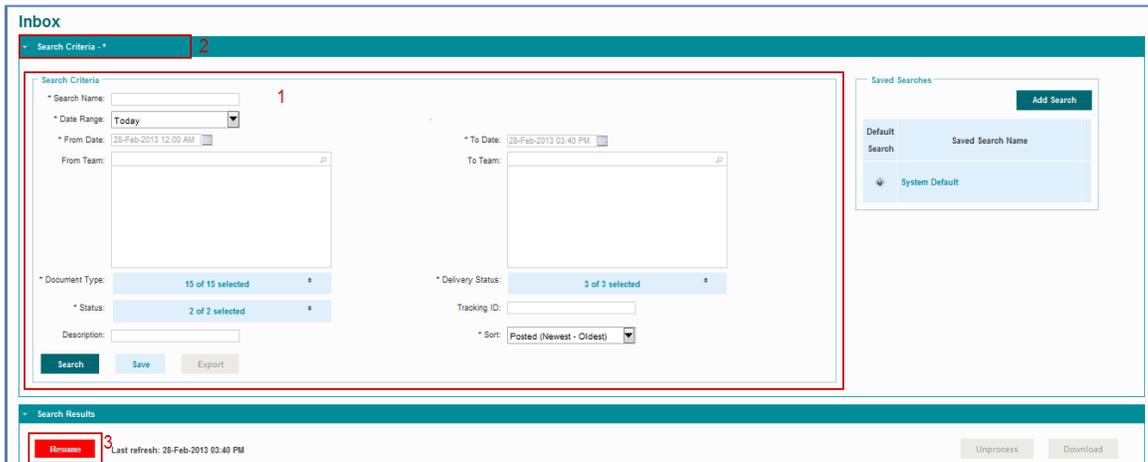
To create a new Saved Search:

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



When the Add Search button is selected, the system:

1. Resets the Search Criteria fields
2. Clears out Search Name
3. Pauses the auto-refresh and disables the Resume button
4. The Search Results list also get cleared out (not seen in screenshot below)

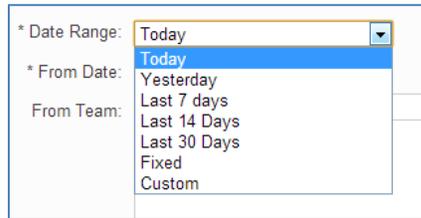


Complete the Search Criteria fields/filters.

Create a search name and enter it in the Search Name field (mandatory):



Enter the Date Range (mandatory)(select from the drop-down menu):



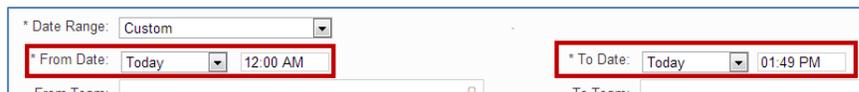
* Date Range: Today
 * From Date: Today
 Yesterday
 Last 7 days
 Last 14 Days
 Last 30 Days
 Fixed
 Custom

If Fixed is selected, complete the From Date and To Date:



* Date Range: Fixed
 * From Date: [calendar icon]
 * To Date: [calendar icon]
 From Team: [text field]
 To Team: [text field]

If Custom is selected, complete the From Date (drop-down menu) and Time (slide bar) and To Date (drop-down menu) and Time (slide bar) (if applicable):



* Date Range: Custom
 * From Date: Today 12:00 AM
 * To Date: Today 01:49 PM
 From Team: [text field]
 To Team: [text field]

Indicate one or more **From Team(s)** using SLU field (optional):



From Team: Central West CCAC - CHRIS Mailbox
 Central CCAC - CHRIS Mailbox
 Central East CCAC - CHRIS Mailbox
 Central West CCAC - CHRIS Mailbox
 Toronto Central CCAC - CHRIS Mailbox

Indicate the **To Team** (optional) – the SLU provides a list of teams you are a member of – you can add more than one team:



From Team: Central West CCAC - CHRIS Mailbox
 To Team: Baxter Order of Nurses North Team
 Baxter Order of Central District

Select one or more options for the following fields:

Document Type (use the scroll bar to see all options):



* Document Type: 15 of 15 selected

* Status: Check all Uncheck all

Description: L&S Order

BR - PS

BR - E&S

ODB - Notif.

PR Response

Search

Delivery Status:



Delivery Status: 1 of 3 selected

Tracking ID: Check all Uncheck all

* Sort: Not Attempted

Delivered

Failed

Status:



* Status: 2 of 2 selected

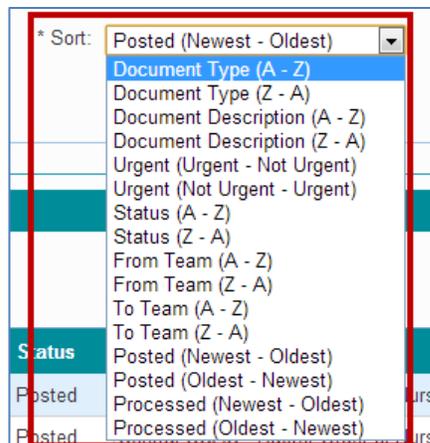
Description: Check all Uncheck all

Posted

Processed

Search

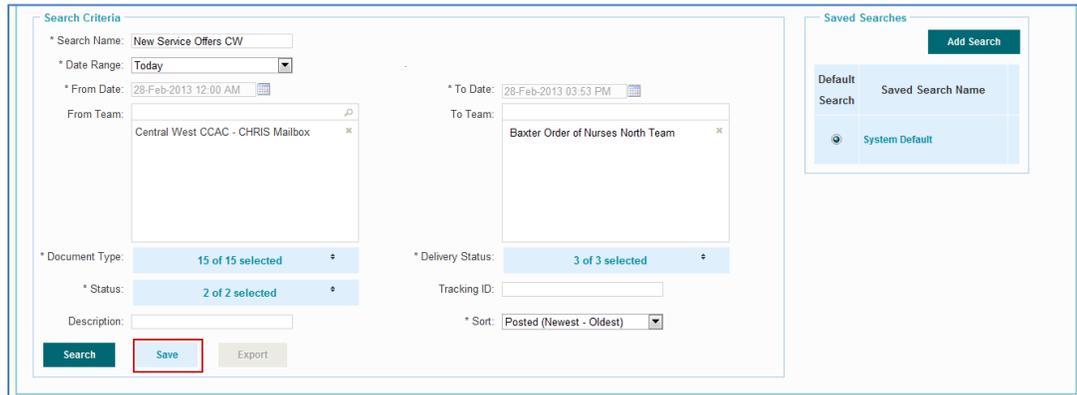
Select a **Sort Order** (optional):



* Sort: Posted (Newest - Oldest)

- Document Type (A - Z)
- Document Type (Z - A)
- Document Description (A - Z)
- Document Description (Z - A)
- Urgent (Urgent - Not Urgent)
- Urgent (Not Urgent - Urgent)
- Status (A - Z)
- Status (Z - A)
- From Team (A - Z)
- From Team (Z - A)
- To Team (A - Z)
- To Team (Z - A)
- Status
- Posted (Newest - Oldest)
- Posted (Oldest - Newest)
- Posted Processed (Newest - Oldest)
- Posted Processed (Oldest - Newest)

Click **Save**:

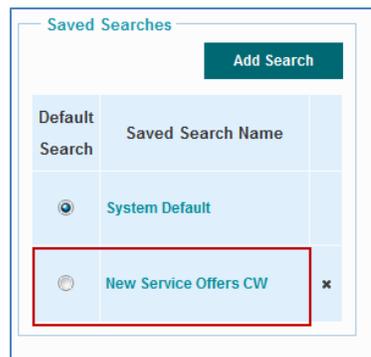


The screenshot shows the 'Search Criteria' form with the following fields and values:

- Search Name: New Service Offers CW
- Date Range: Today
- From Date: 28-Feb-2013 12:00 AM
- To Date: 28-Feb-2013 03:53 PM
- From Team: Central West CCAC - CHRIS Mailbox
- To Team: Baxter Order of Nurses North Team
- Document Type: 15 of 15 selected
- Delivery Status: 3 of 3 selected
- Status: 2 of 2 selected
- Tracking ID: (empty)
- Sort: Posted (Newest - Oldest)

The 'Save' button is highlighted with a red border.

The new Search Criteria is now saved in the Saved Searches list:

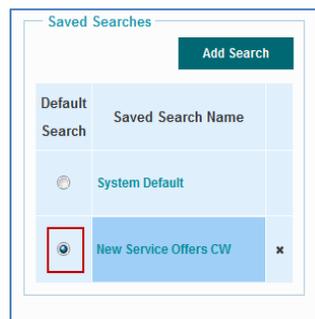


The screenshot shows the 'Saved Searches' list with the following entries:

Default Search	Saved Search Name
<input checked="" type="radio"/>	System Default
<input type="radio"/>	New Service Offers CW

The 'New Service Offers CW' entry is highlighted with a red border.

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



The screenshot shows the 'Saved Searches' list with the following entries:

Default Search	Saved Search Name
<input type="radio"/>	System Default
<input checked="" type="radio"/>	New Service Offers CW

The radio button for 'New Service Offers CW' is highlighted with a red border.

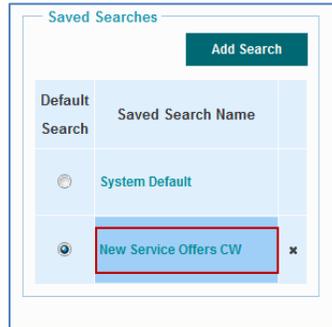
The Search Criteria name will appear at the top of the page to indicate that is the Search Criteria being used.

You can repeat the process up until you have 5 custom Saved Searches (not including the System Default).

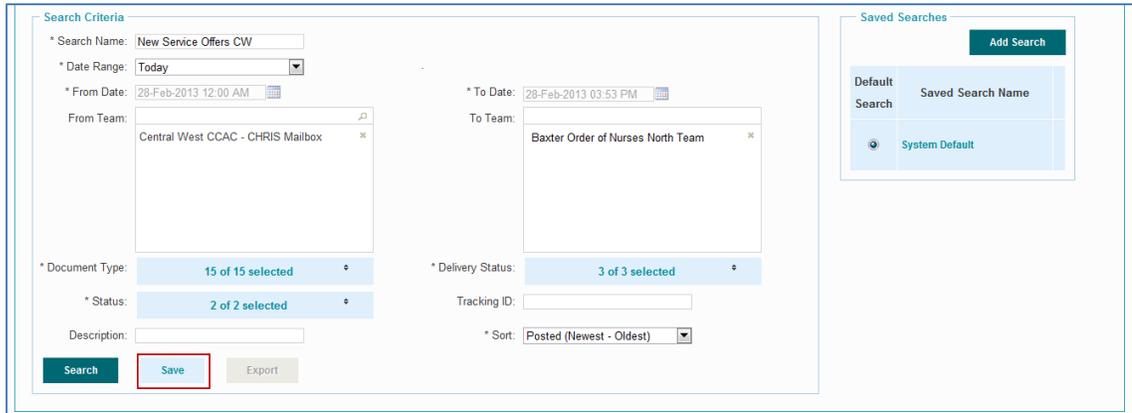
To execute a Saved Search, just click on the Saved Search Name and the Search Criteria will populate with that Saved Search's settings.

To modify an existing Saved Search:

Click on the **Saved Search Name**:

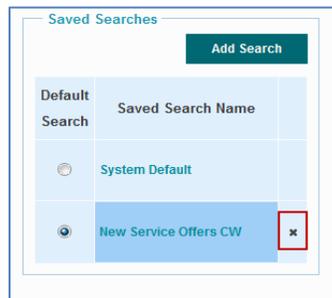


Modify the fields and filters you need to change and click **Save**:



To remove/delete a Saved Search:

Click on the 'x' button beside the Saved Search Name to remove it:



3.3 Search Results

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

Search Results										
Resume		Last refresh: 12-Mar-2013 11:00 AM						Unprocess		Download
a	b	c	d	e	f	g		h	i	
Document Type	Description	Tracking ID	Urgent	Status	From Team	To Team		Posted	Processed	
<input type="checkbox"/>	Service Referral	BRN:104845_Offer ID:1005411	e5da		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 3:13 PM EST		
<input type="checkbox"/>	Service Offer	Urgent Offer ID:1005411	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 EST	
<input type="checkbox"/>	Service Referral	BRN:101251_Offer ID:1005410-Ur	9cac		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 2:07 PM EST		
<input type="checkbox"/>	Service Referral	BRN:101251_Offer ID:1005410	c381		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 11:22 AM EST		
<input type="checkbox"/>	Unspecified	Copy of Regression 2_2Feb26 (2)	a627	Yes	Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 11:11 AM EST		
<input type="checkbox"/>	Unspecified	Physio.pdf	99ac		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 9:57 AM EST		
<input type="checkbox"/>	Frequency Update	BRN:102705	aa9a		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	06-Mar-2013 10:16 AM EST		
<input type="checkbox"/>	Frequency Update	BRN:102705	4b7a		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	06-Mar-2013 10:16 AM EST		

- a. Document Type (see [Section 3.1](#))
- b. 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
<input type="checkbox"/> Client Update Noti	 New Client Assessment	0c16		Posted	Central West CCAC - CHRIS Mailbox
<input type="checkbox"/> Client Update Noti	 New Client Assessment	6bc9		Processed	Central West CCAC - CHRIS Mailbox

Click on the icon to download that one single document.

- c. Tracking ID – the last 4 characters of the 32 character Tracking ID assigned to every message/notification
- d. Urgent – Yes if user who sent the message checked off the Urgent box (blank if not urgent)
- e. Status – either Posted or Processed
- f. From Team – prefixed with the CCAC the team belongs to
- g. To Team - prefixed with the CCAC the team belongs to
- h. Posted - date/time stamp of when the message got posted to Inbox
- i. Processed - date/time stamp when the message was opened/viewed/downloaded

3.3.1 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	To Team	Posted	Processed
<input type="checkbox"/> Client Update Notification	New Client Assessment	0c16		Posted	Central West CCAC - CHRIS Mailbo	Central West CCAC - HPG-P-01-DO	21-Feb-2013 9:44 AM	
<input type="checkbox"/> Client Update Notification	New Client Assessment	6bc9		Processed	Central West CCAC - CHRIS Mailbo	Central West CCAC - HPG-P-01-DO	18-Feb-2013 3:56 PM	19-Feb-2013 11:42 AM
<input type="checkbox"/> Client Update Notification	New Client Assessment	68c1		Posted	Central West CCAC - CHRIS Mailbo	Central West CCAC - HPG-P-01-DO	18-Feb-2013 10:17 AM	
<input type="checkbox"/> Service Referral	BRN:102554_Offer ID:100284	c8ec		Processed	Central West CCAC - CHRIS Mailbo	Central West CCAC - HPG-P-01-DO	18-Feb-2013 10:13 AM	18-Feb-2013 10:18 AM
<input type="checkbox"/> Client Update Notification	New Client Assessment	21de		Processed	Central West CCAC - CHRIS Mailbo	Central West CCAC - HPG-P-01-DO	18-Feb-2013 9:50 AM	18-Feb-2013 10:16 AM
<input type="checkbox"/> Service Referral	BRN:102554_Offer ID:100284	a919		Posted	Central West CCAC - CHRIS Mailbo	Central West CCAC - HPG-P-01-DO	13-Feb-2013 11:19 AM	
<input type="checkbox"/> Service Referral	BRN:102554_Offer ID:100284	565e		Processed	Central West CCAC - CHRIS Mailbo	Central West CCAC - HPG-P-01-DO	11-Feb-2013 2:24 PM	13-Feb-2013 10:40 AM

Page 1 of 1 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.

3.3.2 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:

To Team:

* Document Type: 5 of 5 selected

* Delivery Status: 3 of 3 selected

* Status: 2 of 2 selected

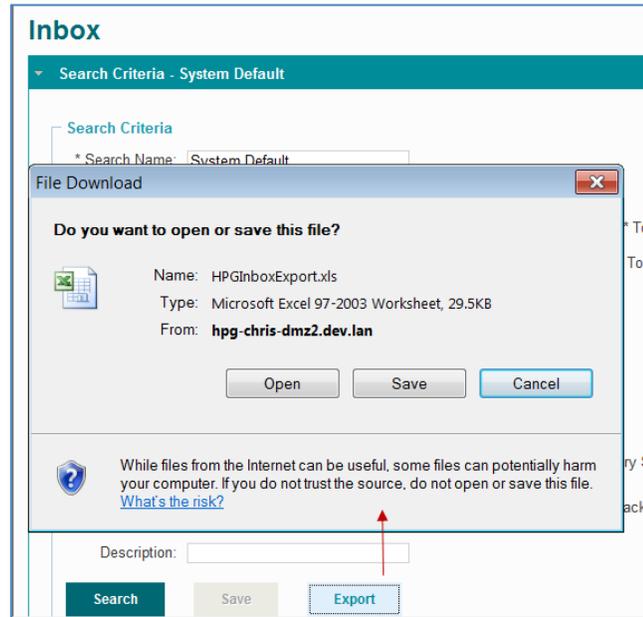
Tracking ID:

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:



The Excel spreadsheet will look like this:

Date: 26-02-2013 15:59 PM EST



HPG Inbox

Parameters Summary:

From Date	27-Jan-2013 12:00 AM EST
To Date	26-Feb-2013 3:58 PM EST
From Teams	ALL
To Teams	ALL
Document Type	Unspecified,Billing PS,Billing E&S,Client Information,Organization Delegation Notification
Delivery Status	Not Attempted,Delivered,Failed
Status	Posted,Processed
Tracking ID	
Description	
Sort	Posted (Newest - Oldest)
Run Date	26-Feb-2013 3:59 PM EST

Document Type	Description	Tracking ID	Urgent	Status	From Teams	To Teams	Posted	Processed
Unspecified	Assessment Sharing Authorization Template Processing UC.docx	6071		Posted	Central CCAC - Baxter Order of Nurses-K	Central CCAC - CHRIS Mailbox	26-Feb-2013 11:16 AM EST	
Unspecified	OA Letterhead.docx	788e		Posted	Central CCAC - Baxter Order of Nurses-K	Central CCAC - CHRIS Mailbox	26-Feb-2013 11:15 AM EST	
Client Information	Chris, Susan Testing (3621): 102066 Subject: susan's Feb 26 docushare upload.jpg	a242		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - CHRIS Mailbox	26-Feb-2013 8:53 AM EST	
Unspecified	Chris, Smoke Test Nov 21: 102628 Subject: merge failed Feb 22	4604		Processed	Central CCAC - CHRIS Mailbox	Central CCAC - CHRIS Mailbox	22-Feb-2013 12:42 PM EST	25-Feb-2013 9:40 PM EST
Client Information	Chris, Smoke Test Nov 21: 102628 Subject: merge failed Feb 22	7847		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - CHRIS Mailbox	22-Feb-2013 11:23 AM EST	
Unspecified	ICCP_Client_Deta(1).pdf	da56		Posted	Central CCAC - ST Provider For Home Care	Central CCAC - CHRIS Mailbox	22-Feb-2013 9:35 AM EST	
Organization Delegation Notification	Delegation: ST-PHO-Provider#11	604c		Processed	Central CCAC - CHRIS Mailbox	Central CCAC - CHRIS Mailbox	21-Feb-2013 3:22 PM EST	22-Feb-2013 11:30 AM EST
Organization Delegation Notification	Delegation: Cent-ST-PHO-Provider #2	3e89		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - CHRIS Mailbox	21-Feb-2013 3:22 PM EST	

You can save or print the Excel report.

4. SEND DOCUMENT

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

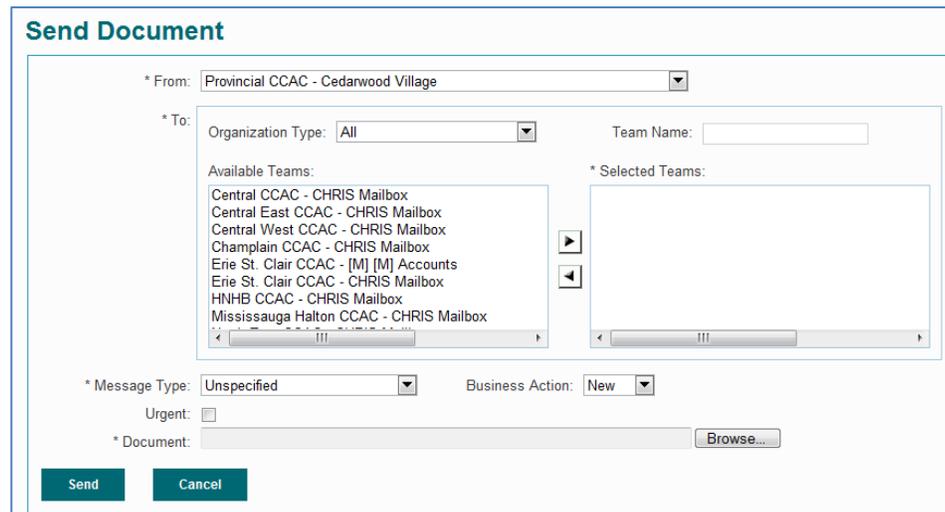
For those CCACs and Health Partners that have implemented CSR (Client Services Report) Upload – which allows Health Partners to upload client related documents directly into the client's file in CHRIS, that would be the preferred method for sending client-related documents.

To send unspecified documents to a CCAC:

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



The Send Document page will open:

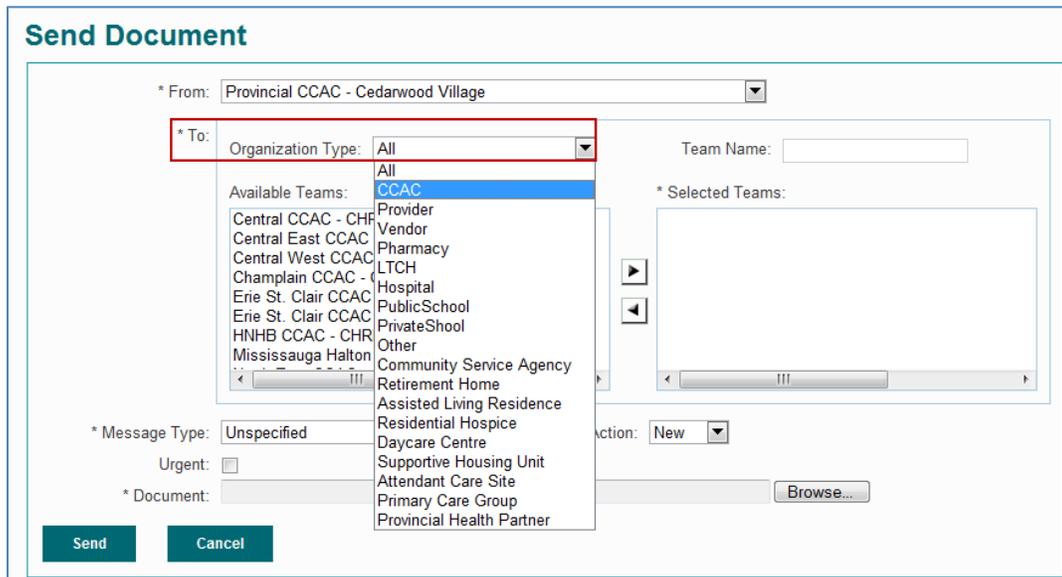


Complete the following fields:

From (mandatory) – If you belong to multiple teams, then select the appropriate 'From' team from the drop down list; if you only belong to one, it will be auto-populated in the field without the drop down menu option to select another.

To (mandatory) – the 'To' section contains two search filters - **Organization Type** and **Team Name**.

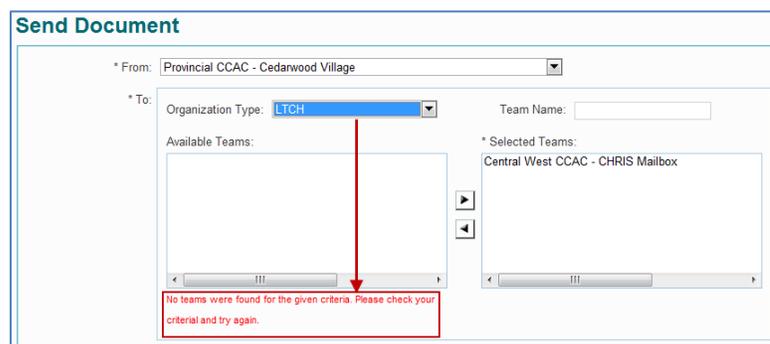
Select '**CCAC**' from the **Organization Type** drop down menu (default is 'All'):



The screenshot shows the 'Send Document' interface. The 'From' field is set to 'Provincial CCAC - Cedarwood Village'. The 'To' section has 'Organization Type' set to 'All' and 'Team Name' is empty. A dropdown menu for 'Organization Type' is open, showing a list of options: All, CCAC (highlighted), Provider, Vendor, Pharmacy, LTCH, Hospital, PublicSchool, PrivateSchool, Other, Community Service Agency, Retirement Home, Assisted Living Residence, Residential Hospice, Daycare Centre, Supportive Housing Unit, Attendant Care Site, Primary Care Group, and Provincial Health Partner. Below the dropdown, there are fields for 'Message Type' (Unspecified), 'Urgent' (checkbox), and 'Document' (with a 'Browse...' button). 'Send' and 'Cancel' buttons are at the bottom left.

Although you are given the option to select other organization types (provider, vendor, pharmacy, LTCH, etc.), selecting anything other than 'CCAC' will result in the following message:

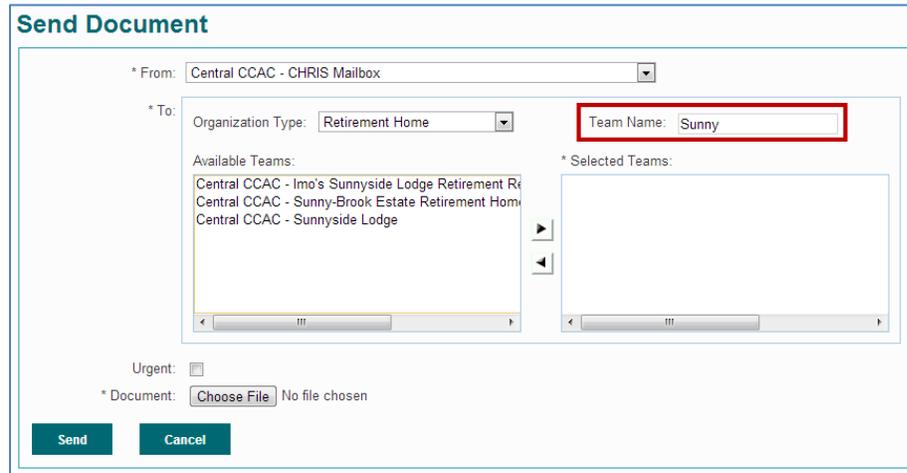
"No teams were found for the given criteria. Please check your criteria and try again"



The screenshot shows the 'Send Document' interface with 'Organization Type' set to 'LTCH'. The 'Available Teams' list is empty. A red arrow points from the 'LTCH' selection in the dropdown to a red-bordered box containing the error message: "No teams were found for the given criteria. Please check your criteria and try again." The 'Selected Teams' list contains 'Central West CCAC - CHRIS Mailbox'.

Health Partner users can only send documents to a CCAC – not to any other organization types.

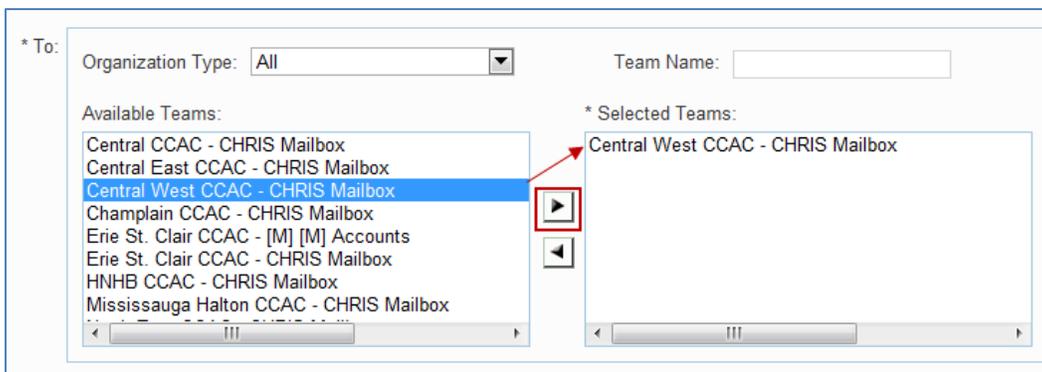
Next, select the Team Name you are sending the document to. You can either select the Team directly from the list of **Available Teams** or perform a search in the '**Team Name**' smart-lookup (SLU) field if the Available Teams list is lengthy.



 After typing in the letters in the **Team Name** field, click inside the Available Teams results box to generate the results.

Highlight the correct Team in the Available Teams list and click on the right arrow [>] to select the Team (move it to the Selected Team list).

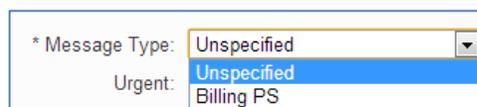
If the file is going to more than one Team, repeat the filter process (select Organization Type, Team Name, etc.).



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):

- Unspecified – for any non-specific document type (any format)
- Billing PS – for when billing/invoice files are being sent (and the billing is not being sent via Manual Invoice Entry)
- CSR Upload Document – option available if provider is using CSR Upload; refer to [Section 6](#)



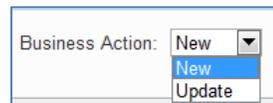
For **Equipment and Supplies Vendor** User (user who belongs to a E&S Vendor Team)

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

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

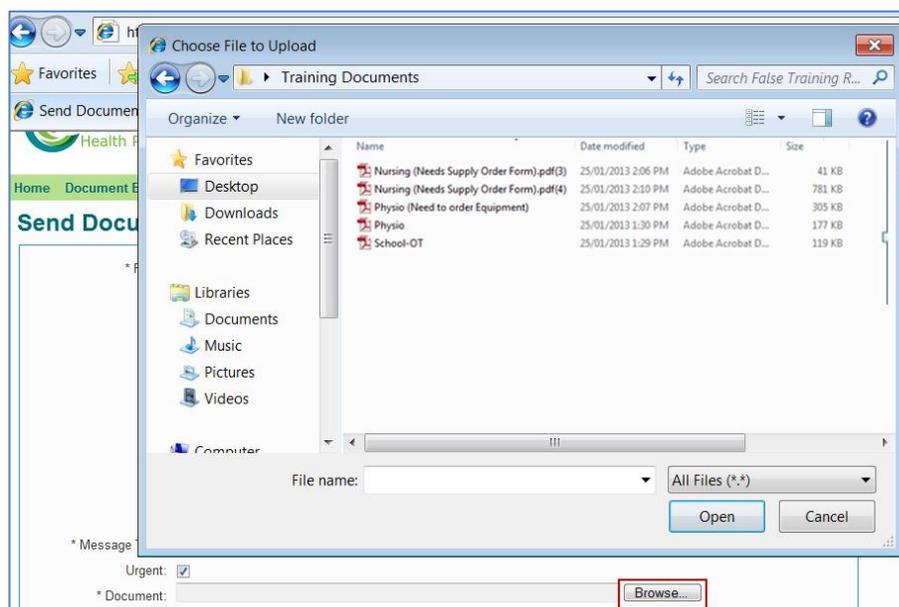
Select the appropriate option in the 'Business Action' field (optional); the choices are New or Update:



The **Urgent** check box is optional. Check the box if you want to indicate in the recipient's HPG Inbox that the file is Urgent (will be indicated with a red checkmark).



Attach the document you are sending by selecting the 'Browse' button and finding the document on your local drive using the file chooser dialogue window:



The file path of the selected document will appear in the Document field:

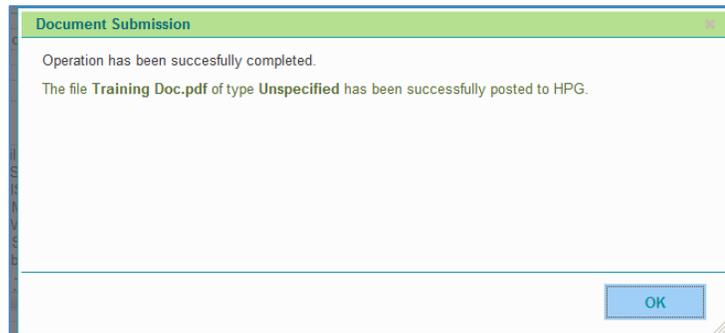
* Document:

Click **Send** to send the document to the chosen recipients.



Only one document can be sent at a time. Multiple files can be sent if they are contained in a .zip folder and selected.

A Document Submission confirmation window will pop up (click OK):



If the wrong document was sent, the document can be recalled. Refer to [Section 5.2.1](#).

5. 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.



The Sentbox page will open:



Sentbox

Search Criteria

Search Results

Document Type	Description	Tracking ID	Urgent	Status	From Team	To Team	Posted	Processed
<input type="checkbox"/> Unspecified	Training Doc.pdf	d6d3	Yes	Posted	Provincial CCAC - Peel Manor	Central West CCAC - CHRIS Mailbox	28-Feb-2013 12:43 PM	

Page 1 of 1
1 record(s) found

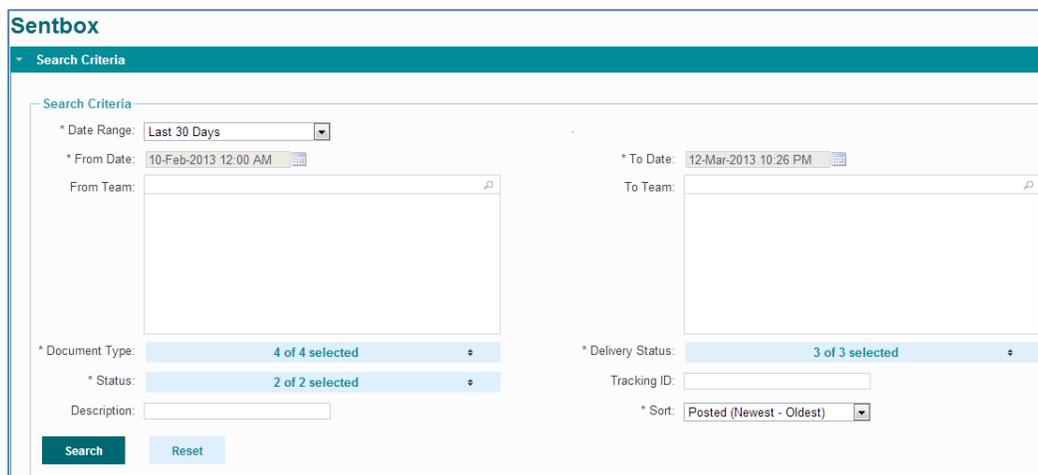
Search Results list provides all results that reflect the Search Criteria default (i.e. all sent items from the last 30 days from all teams, all document types, either posted or processed, with delivery status of either not attempted, delivered and failed –sorted from newest at the top to the oldest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

5.1 Search Criteria

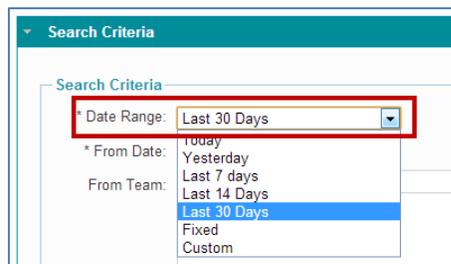
To customize your search results, expand the Search Criteria section by clicking on the light blue 'Search Criteria' band at the top:



Use the filters to customize your search:

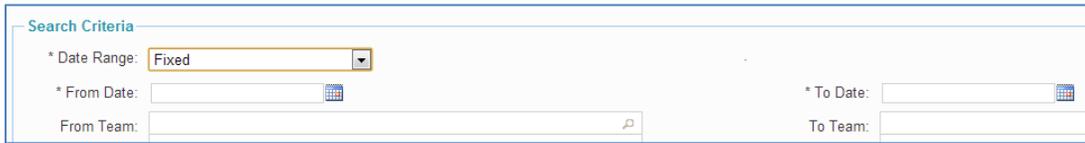


Date Range – default is 'Last 30 Days'; other options are 'Today', 'Yesterday', 'Last 7 Days', 'Last 14 Days', 'Fixed' and 'Custom'



From Date and **To Date** - default Current Date and Time minus 30 days. The 'From' and 'To' Dates will automatically reflect the Date Range selection above.

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



Search Criteria

* Date Range: Fixed

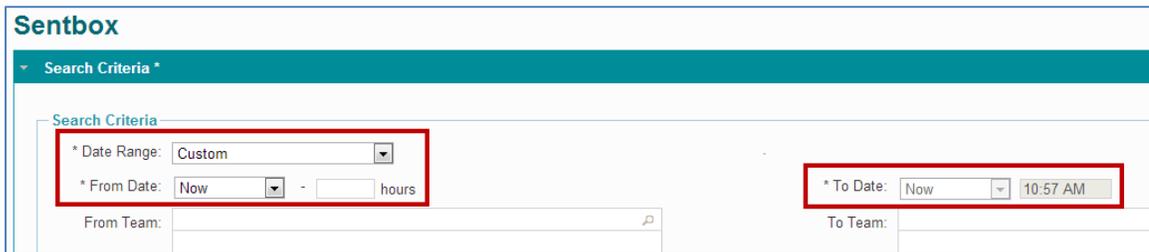
* From Date: [Calendar icon]

From Team: [Text input]

* To Date: [Calendar icon]

To Team: [Text input]

If Date Range selected is **Custom**, it will allow you to specify day and time (default is 'Now'):



Sentbox

Search Criteria *

Search Criteria

* Date Range: Custom

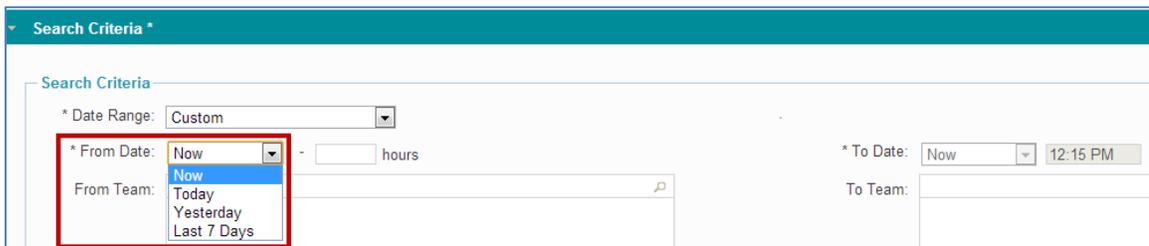
* From Date: Now - [] hours

From Team: [Text input]

* To Date: Now 10:57 AM

To Team: [Text input]

Other Custom options for the 'From Date' are: 'Today', 'Yesterday' and 'Last 7 Days':



Search Criteria *

Search Criteria

* Date Range: Custom

* From Date: Now - [] hours

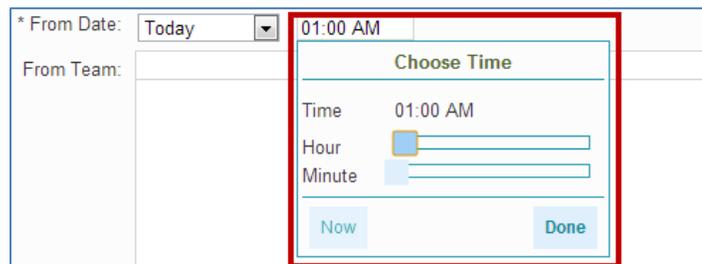
From Team: [Text input]

* To Date: Now 12:15 PM

To Team: [Text input]

From Date dropdown menu options: Now, Today, Yesterday, Last 7 Days

Specify a time using the Hour and Minute slide bars:



* From Date: Today

From Team: [Text input]

01:00 AM

Choose Time

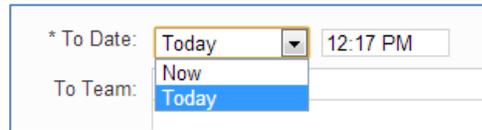
Time 01:00 AM

Hour [Slide bar]

Minute [Slide bar]

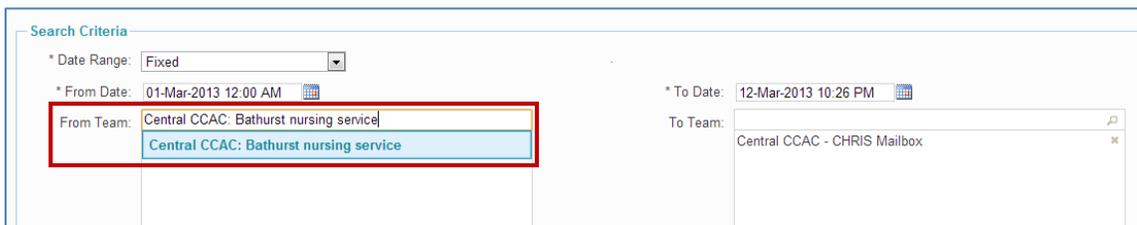
Now Done

Set the 'To Date'; your options are either 'Now' or 'Today'. If you select 'Now' the time will default to current time. If you select 'Today', you can specify the time using the Hour and Minute slide bars:



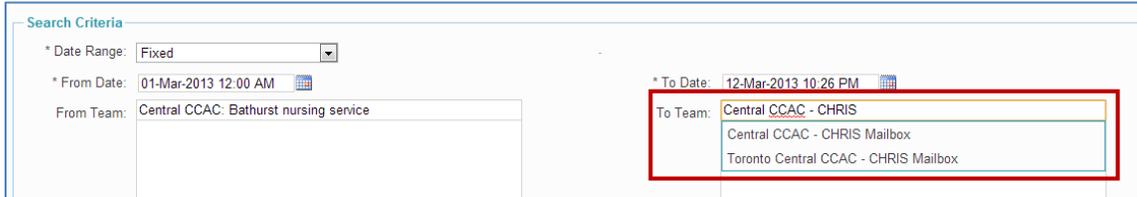
* To Date: Today 12:17 PM
To Team: Now Today

From Team – Use the SLU to filter the Sentbox to only show documents from a selected 'From Team'. You can select from all teams you are a member of:



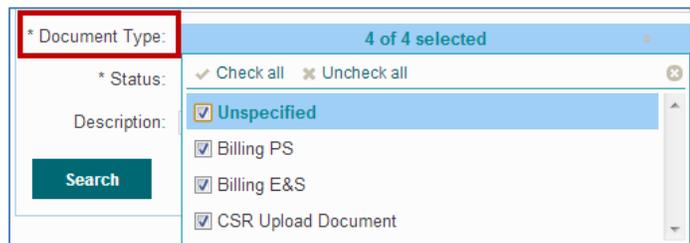
Search Criteria
* Date Range: Fixed
* From Date: 01-Mar-2013 12:00 AM
* To Date: 12-Mar-2013 10:26 PM
From Team: Central CCAC: Bathurst nursing service
To Team: Central CCAC - CHRIS Mailbox

To Team – Use the SLU to filter the Sentbox to only show documents from a selected 'To Team'; one or more teams can be selected:



Search Criteria
* Date Range: Fixed
* From Date: 01-Mar-2013 12:00 AM
* To Date: 12-Mar-2013 10:26 PM
From Team: Central CCAC: Bathurst nursing service
To Team: Central CCAC - CHRIS
Central CCAC - CHRIS Mailbox
Toronto Central CCAC - CHRIS Mailbox

Document Type – default 'All'; this multi-select control filters the Inbox to only show documents of a selected 'Document Type':

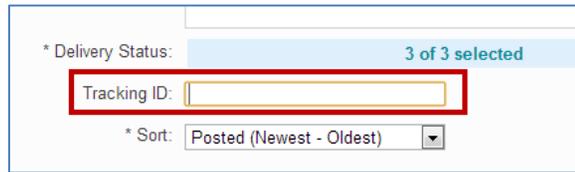


* Document Type: 4 of 4 selected
* Status: Check all Uncheck all
Description: Unspecified
Billing PS
Billing E&S
CSR Upload Document
Search

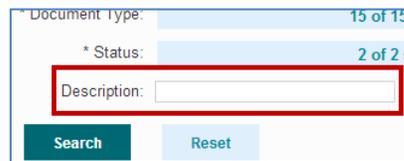
Delivery Status – default 'All'; multi-select control filters for documents of a selected Delivery Status – 'Not Attempted', 'Delivered' and 'Failed':



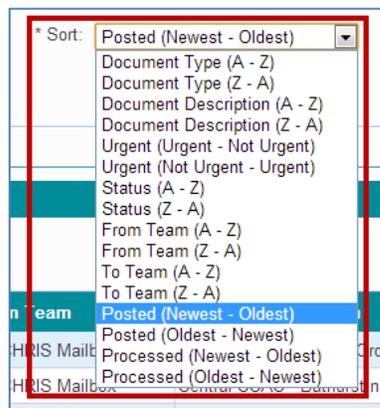
Tracking ID - the tracking ID is a 32 character alphanumeric string. To search by Tracking ID, enter the last 4 characters of the ID:



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



Sort – use to specify the primary sort order for the search results displayed:



Click '**Search**' to view results. Click '**Reset**' to reset filters to default settings:



5.2 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).

Search Results									
								Recall	
<input type="checkbox"/>	Document Type	Description	Tracking ID	Urgent	Status	From Team	To Team	Posted	Processed
<input type="checkbox"/>	CSR Upload Doc	RAI-HC-CO_PHP[1].pdf	34ed		Processed	Central CCAC - Baxter Order of Nu	Central CCAC - CHRIS Mailbox	07-Mar-2013 2:18 PM	07-Mar-2013 2:19 PM
<input type="checkbox"/>	CSR Upload Doc	Training Doc.pdf	4ae0		Processed	Central CCAC - Baxter Order of Nu	Central CCAC - CHRIS Mailbox	07-Mar-2013 11:48 AM	07-Mar-2013 11:49 AM
<input type="checkbox"/>	Unspecified	Assessment Sharing Authorizati	6071		Posted	Central CCAC - Baxter Order of Nu	Central CCAC - CHRIS Mailbox	26-Feb-2013 11:16 AM	
<input checked="" type="checkbox"/>	Unspecified	OA Letterhead.docx	788e		Posted	Central CCAC - Baxter Order of Nu	Central CCAC - CHRIS Mailbox	26-Feb-2013 11:15 AM	
<input type="checkbox"/>	CSR Upload Doc	~Image TIF File.tif	2e1e		Processed	Central CCAC - Max HC services -	Central CCAC - CHRIS Mailbox	25-Feb-2013 11:07 AM	25-Feb-2013 11:08 AM
<input type="checkbox"/>	CSR Upload Doc	~Image TIF File.tif	3717		Processed	Central CCAC - Max HC services -	Central CCAC - CHRIS Mailbox	25-Feb-2013 10:34 AM	25-Feb-2013 10:35 AM
<input type="checkbox"/>	CSR Upload Doc	~Image GIF File.gif	8ca1		Processed	Central CCAC - Max HC services -	Central CCAC - CHRIS Mailbox	25-Feb-2013 10:34 AM	25-Feb-2013 10:35 AM
<input type="checkbox"/>	CSR Upload Doc	~Image GIF File.gif	b989		Processed	Central CCAC - Max HC services -	Central CCAC - CHRIS Mailbox	25-Feb-2013 10:33 AM	25-Feb-2013 10:34 AM
<input type="checkbox"/>	CSR Upload Doc	newfile.txt	6584		Processed	Central CCAC - Baxter Order of Nu	Central CCAC - CHRIS Mailbox	22-Feb-2013 10:08 AM	22-Feb-2013 10:09 AM
<input type="checkbox"/>	CSR Upload Doc	~MS.Project 2010.File.mpp	1317		Processed	Central CCAC - Max HC services -	Central CCAC - CHRIS Mailbox	22-Feb-2013 10:06 AM	22-Feb-2013 10:07 AM

There is no download icon beside the document description and there is no option to 'unprocess' a document.

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

5.2.1 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. You may select one or multiple documents to recall:

Search Results									
								Recall	
<input type="checkbox"/>	Document Type	Description	Tracking ID	Urgent	Status	From Team	To Team	Posted	Processed
<input type="checkbox"/>	CSR Upload Doc	RAI-HC-CO_PHP[1].pdf	34ed		Processed	Central CCAC - Baxter Order of Nu	Central CCAC - CHRIS Mailbox	07-Mar-2013 2:18 PM	07-Mar-2013 2:19 PM
<input type="checkbox"/>	CSR Upload Doc	Training Doc.pdf	4ae0		Processed	Central CCAC - Baxter Order of Nu	Central CCAC - CHRIS Mailbox	07-Mar-2013 11:48 AM	07-Mar-2013 11:49 AM
<input checked="" type="checkbox"/>	Unspecified	Assessment Sharing Authorizati	6071		Posted	Central CCAC - Baxter Order of Nu	Central CCAC - CHRIS Mailbox	26-Feb-2013 11:16 AM	
<input checked="" type="checkbox"/>	Unspecified	OA Letterhead.docx	788e		Posted	Central CCAC - Baxter Order of Nu	Central CCAC - CHRIS Mailbox	26-Feb-2013 11:15 AM	
<input type="checkbox"/>	CSR Upload Doc	~Image TIF File.tif	2e1e		Processed	Central CCAC - Max HC services -	Central CCAC - CHRIS Mailbox	25-Feb-2013 11:07 AM	25-Feb-2013 11:08 AM
<input type="checkbox"/>	CSR Upload Doc	~Image TIF File.tif	3717		Processed	Central CCAC - Max HC services -	Central CCAC - CHRIS Mailbox	25-Feb-2013 10:34 AM	25-Feb-2013 10:35 AM

Click the '**Recall**' button:

Team	Posted	Processed
CHRIS Mailbox	07-Mar-2013 2:18 PM	07-Mar-2013 2:19 PM
CHRIS Mailbox	07-Mar-2013 11:48 AM	07-Mar-2013 11:49 AM
CHRIS Mailbox	26-Feb-2013 11:16 AM	

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

Search Results									
	Document Type	Description	Tracking ID	Urgent	Status	From Team	To Team	Posted	Processed
<input type="checkbox"/>	CSR Upload Doc	RAI-HC-CO_PHP[1].pdf	34ed		Processed	Central CCAC - Baxter Order of Nu	Central CCAC - CHRIS Mailbox	07-Mar-2013 2:18 PM	07-Mar-2013 2:19 PM
<input type="checkbox"/>	CSR Upload Doc	Training Doc.pdf	4ae0		Processed	Central CCAC - Baxter Order of Nu	Central CCAC - CHRIS Mailbox	07-Mar-2013 11:48 AM	07-Mar-2013 11:49 AM
<input type="checkbox"/>	CSR Upload Doc	~Image TIF File.tif	2e1e		Processed	Central CCAC - Max HC services	Central CCAC - CHRIS Mailbox	25-Feb-2013 11:07 AM	25-Feb-2013 11:08 AM
<input type="checkbox"/>	CSR Upload Doc	~Image TIF File.tif	3717		Processed	Central CCAC - Max HC services	Central CCAC - CHRIS Mailbox	25-Feb-2013 10:34 AM	25-Feb-2013 10:35 AM
<input type="checkbox"/>	CSR Upload Doc	~Image GIF File.gif	8ca1		Processed	Central CCAC - Max HC services	Central CCAC - CHRIS Mailbox	25-Feb-2013 10:34 AM	25-Feb-2013 10:35 AM



You cannot recall a CSR Upload Document or a Billing file – only Unspecified documents.

6. CSR UPLOAD DOCUMENTS

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

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

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

1. 'CSR Upload Documents' tab in the Community Health Portal (CHP)
2. Send Documents section of Document Exchange

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

For information on CSR Upload Documents in CHP, please refer to Module 4.

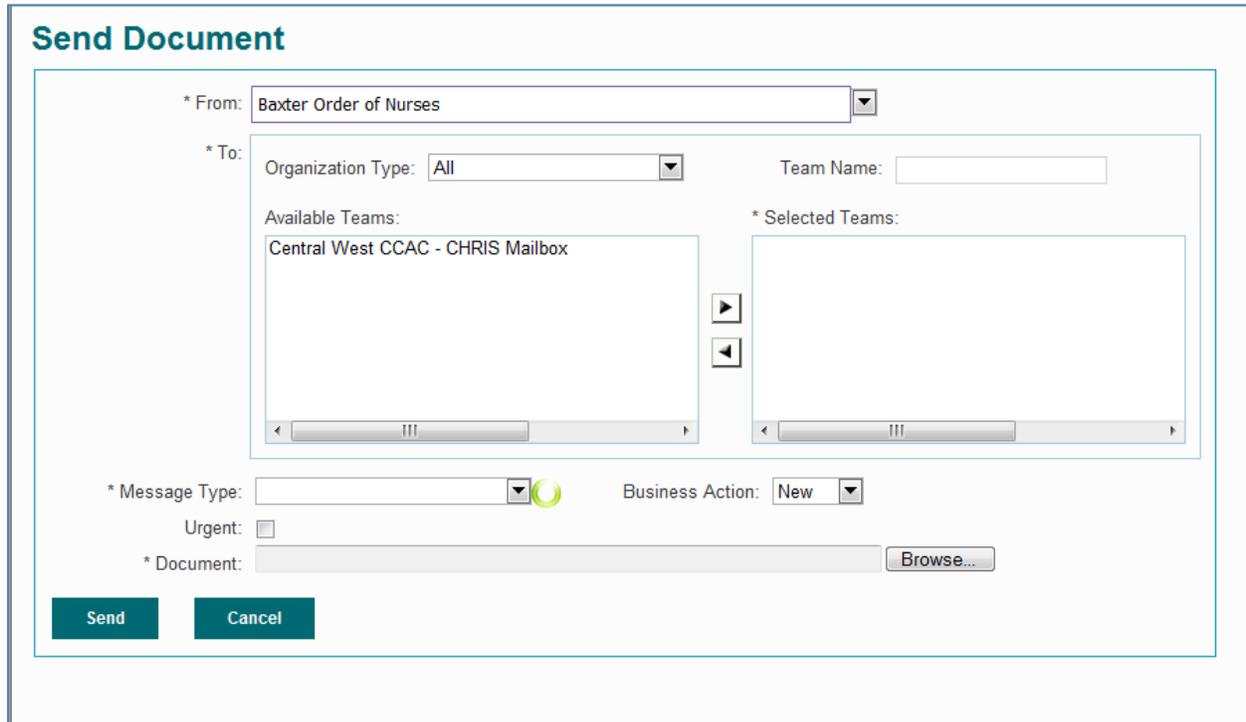
6.1 CSR Upload from Document Exchange

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.

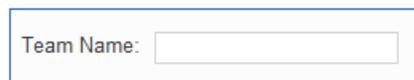


The screenshot shows a 'Send Document' form with the following fields and controls:

- * From:** A dropdown menu currently showing 'Baxter Order of Nurses'.
- * To:** A section containing:
 - Organization Type:** A dropdown menu set to 'All'.
 - Team Name:** An empty text input field.
 - Available Teams:** A list box containing 'Central West CCAC - CHRIS Mailbox'.
 - * Selected Teams:** An empty list box.
 - Two arrow buttons (right and left) between the list boxes for moving items.
- * Message Type:** A dropdown menu with a green status indicator.
- Business Action:** A dropdown menu set to 'New'.
- Urgent:** An unchecked checkbox.
- * Document:** A text input field with a 'Browse...' button to its right.
- Buttons:** 'Send' and 'Cancel' buttons at the bottom left.

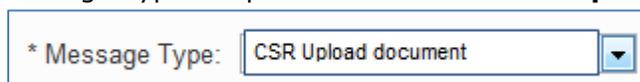
The '**From**' drop down menu will display the list of Provider HPG Teams that the logged in Provider User is a member of and is associated with the CCAC of the selected client. The default 'From Team' will display the CCAC that owns the team followed by the Provider Team name. If the user belongs to only one Provider Team associated with the CCAC of the selected client, then the field is display only (no drop down list). If the use belongs to more than one Provider Team that is associated with the CCAC of the selected client, then the field is a drop down list and user must select the Provider Team.

In the '**To**' section, select 'CCAC' from the drop down list for '**Organization Type**'. Select the CHRIS Mailbox of the CCAC that the client belongs to and use the  icon to move the CCAC team from the 'Available Teams' window to the 'Selected Teams' window. Alternatively, you can search for the Team Name using the SLU:



Team Name:

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



* Message Type:

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):

* Message Type:

 * BRN:

 * Document:

After entering a BRN and clicking :

If it doesn't find a match, you will see the following message:

Error

 No records exist for the entered BRN.

To search again, click and 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:

 * BRN:

 Client: Kim, Training1 HCN:

 * Service Delivery Type:

	Service Delivery Type	Provider Assigned Date	Provider Discharged	Status
<input type="radio"/>	Outcome-Based Wound - Outcome-Based Wound - s	07-Mar-2013		Active

 * Document Type:

 * Document:

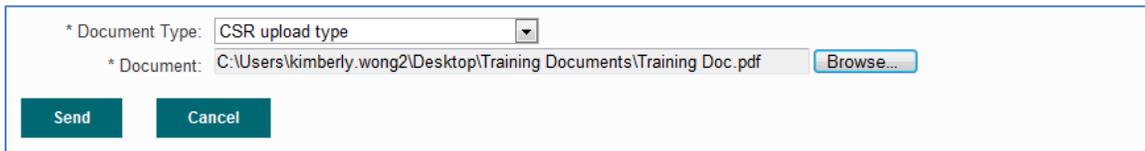
From the Document Type drop down menu, select the Document Type name for the document that will be uploaded.



The Document Type list is pre-determined in CHRIS and each Document Type

is set to file at a specific level in DocuShare® (e.g. Client level, File level, Referral level, Service level)

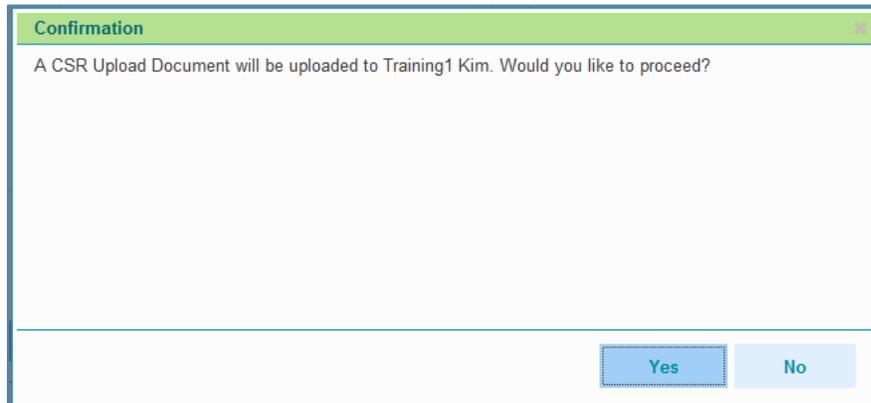
Attach the document for upload by clicking on and finding the document in your local folders for upload.



* Document Type:

* Document:

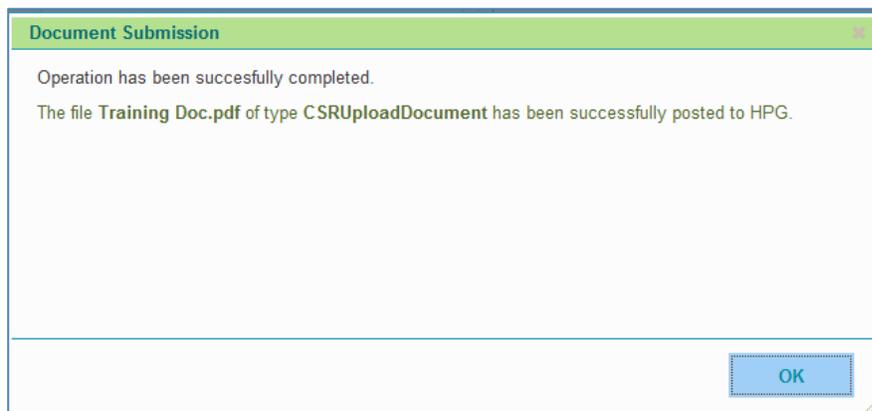
When finished, click . A confirmation window will appear. Click 'Yes' to proceed.



Confirmation

A CSR Upload Document will be uploaded to Training1 Kim. Would you like to proceed?

The following message will appear to confirm successful upload to HPG.



Document Submission

Operation has been successfully completed.

The file **Training Doc.pdf** of type **CSRUploadDocument** has been successfully posted 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).

Sentbox

Search Criteria

Search Results

Document Type	Description	Tracking ID	Urgent	Status	From Team	To Team	Posted	Processed
CSR Upload Document	Training Doc.pdf	4ae0		Posted	Central CCAC - Baxter Order of Nurses-K	Central CCAC - CHRIS Mailbox	07-Mar-2013 11:48 AM EST	
Unspecified	Assessment Sharing Authorization Template	6071		Posted	Central CCAC - Baxter Order of Nurses-K	Central CCAC - CHRIS Mailbox	26-Feb-2013 11:16 AM EST	
Unspecified	OA Letterhead.docx	788e		Posted	Central CCAC - Baxter Order of Nurses-K	Central CCAC - CHRIS Mailbox	26-Feb-2013 11:15 AM EST	

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.

See [Section 6.2.1](#) for more details on CSR Upload Document statuses.

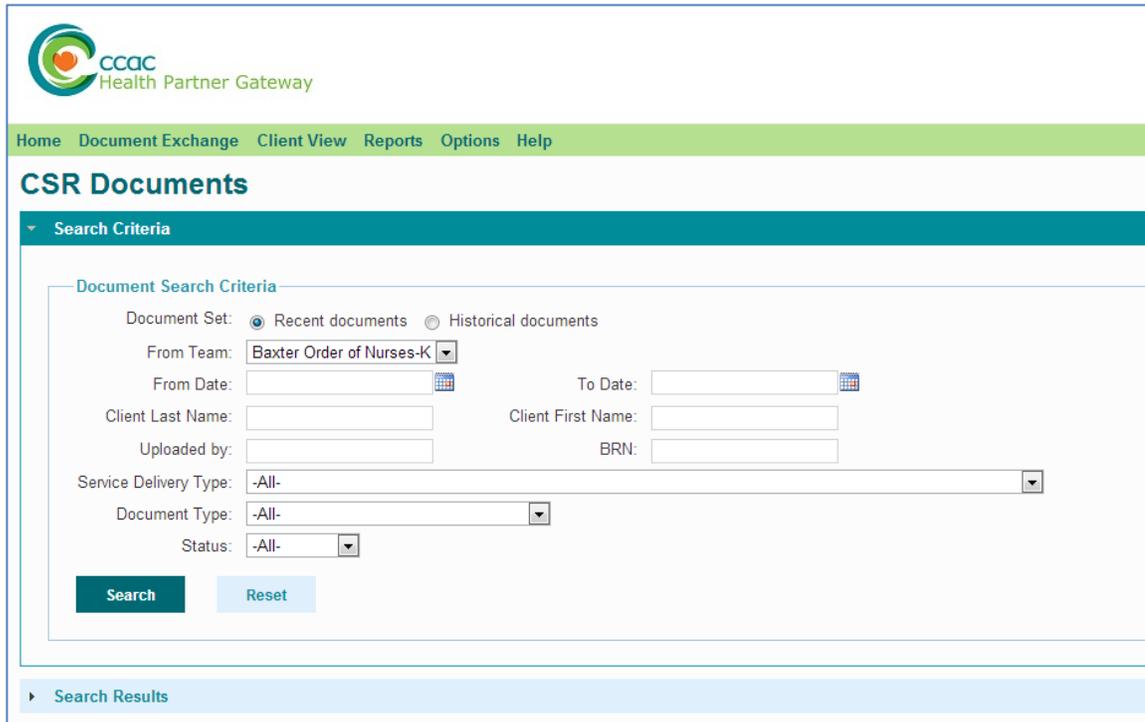
6.2 CSR Upload Document History

The CSR Upload Document 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 Document:

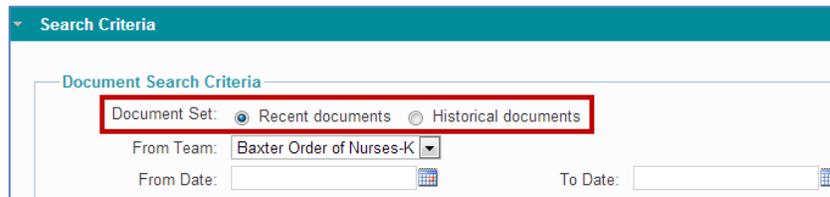


The CSR Documents page will open – the Search Criteria will be expanded (default) to display the Document Search Criteria filters:



The CSR Upload Document 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' (green) 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:



#	BRN	Client Name	Service Delivery Type	Document Type	Update Date/Time	Uploaded By	Actioned By	Actioned Date/Time	Status
1	101251	Training1 Kim	Outcome-Based Wound - sdt	CSR upload type	07-Mar-2013 2:18 PM EST	kimberly hanson-provider			Received
2	101251	Training1 Kim	Outcome-Based Wound - sdt	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	Kimberly Hanson	07-Mar-2013 2:01 PM EST	Reviewed
4	100072	John Storm	Shift home	~ MG - CCAC File Level: Nev 22-Feb-2013 10:03 AM EST	Max Gromov	Kimberly Hanson	Kimberly Hanson	07-Mar-2013 2:01 PM EST	Reviewed

The CSR Upload Documents search results grid default view displays the “Recent CSR Upload Documents” page and 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.

6.2.1 Recent CSR Upload Documents

This section applies to the Recent CSR Upload Documents page in Document Exchange. When selected, the recent document upload history will display.

In Document Exchange, the list includes ALL clients that have been uploaded from HPG.

The line items included in the document upload grid will only be those documents that have not yet been selected to be moved to the ‘Historical CSR Upload Documents’ page. The page displays by default upon loading the CSR Upload Documents page.

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

CSR Documents

Search Criteria

Search Results

Archive Submitted / Received Alert: Document Pending Review In Progress Reviewed

#	BRN	Client Name	Service Delivery Type	Document Type	Update Date/Time	Uploaded By	Actioned By	Actioned Date/Time	Status
61	103527	Tester7 Chris	Visit	CSR integration -File	15-Jan-2013 11:15 AM EST	Max Gromov	Susan Yin	15-Jan-2013 11:31 AM EST	In Progress
62	100072	John Storm	Shift home	~ MG - Client Level Oversizer	15-Jan-2013 10:40 AM EST	Max Gromov			Received
63	103527	Tester7 Chris	Visit	CSR integration -Client	15-Jan-2013 10:13 AM EST	Max Gromov	Susan Yin	15-Jan-2013 10:24 AM EST	In Progress
64	104725	Jan102013 Zou	Visit	~ MG - Service Level: New	11-Jan-2013 3:28 PM EST	Max Gromov	Yanbing Zou	15-Jan-2013 9:28 PM EST	Reviewed
65	102162	Build 3411	Shift home	~ MG - Referral Level: New	10-Jan-2013 4:03 PM EST	Max Gromov	Inna Goldenberg	10-Jan-2013 4:07 PM EST	In Progress
66	104710	Jack Doe	Visit home	~ MG - Client Level Oversizer	09-Jan-2013 2:58 PM EST	Max Gromov	Yanbing Zou	11-Jan-2013 2:50 PM EST	In Progress
67	102397	Build 1.7.0.4287 Smoke	Visit home	IG - all providers can see this	04-Jan-2013 10:46 AM EST	Max Gromov	Kevin Liu	04-Jan-2013 10:56 AM EST	In Progress
68	102319	Marilyn CSRTTest	Shift home	IG - all providers can see this	03-Jan-2013 12:01 PM EST	Omar Provider			Submitted
69	101030	27 March	Shift home	IG - all providers can see this	18-Dec-2012 11:01 AM EST	Max Gromov			Submitted
70	104423	TT Testing 4692 CHRIS	Visit	~ MG - CCAC File Level: Nev	15-Nov-2012 11:30 AM EST	Max Gromov			Received
71	100699	1 Lock	Visit public school	~ MG - CCAC File Level: Nev	13-Nov-2012 10:57 AM EST	Max Gromov			Submitted
72	100699	1 Lock	Visit public school	Document Type 2.2.0	12-Nov-2012 1:46 PM EST	Max Gromov			Submitted
73	103853	Build 3471	Outcome-Based Wound - sdt	~ MG - CCAC File Level: Nev	24-Jul-2012 3:03 PM EDT	Umer Shah-Provider	Susan Yin	30-Nov-2012 2:32 PM EST	In Progress

Page 4 of 9 172 record(s) found

Refer to [Section 6.2.2](#) on how to use the Search Criteria window – it functions the same way in the Recent CSR Upload Documents page as it does on the Historical CSR Upload Documents page.

Each document uploaded is identified on each line with the following attributes:

- BRN
- 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 first six columns after the checkbox column refer HPG Provider side information collected during the CSR Upload process.

The following 3 columns 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 > Provider Reports and in the client record Provider level Details tab > Provider Notifications > Inbound Notification
<input type="checkbox"/> 102282 Darlene Training Visit home ~ MG - Service Level: New 27-Sep-2011 10:49 PM EDT Max Gromov Submitted	
Received (white)	Indicates that the document has been saved in DocuShare® and a link has been created in CHRIS.
<input type="checkbox"/> 102282 Darlene Training Visit home CCAC update client doc 27-Sep-2011 10:02 PM EDT Max Gromov Received	
Received 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 CCAC Administrator) and is pending review.
<input type="checkbox"/> 102282 Darlene Training Visit home Nursing Provider Report 22-Sep-2011 10:23 PM EDT Max Gromov Received	
In Progress (yellow)	A document has been opened/viewed/processed and is in the process of being reviewed.
<input type="checkbox"/> 102117 Jessica Whiting Visit home CCAC new client doc 06-Sep-2011 11:22 AM EDT Max Gromov 06-Sep-2011 11:24 AM EDT In Progress	
Reviewed (green)	Indicates that the CCAC CHRIS user has completed his/her reviewed and has marked the document as reviewed in CHRIS.
<input type="checkbox"/> 102282 Darlene Training Visit home Nursing Provider Report 20-Sep-2011 12:26 PM EDT Max Gromov Darlene Pat 26-Sep-2011 9:37 AM EDT Reviewed	

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.

The legend on the page indicates the status of each colour.

6.2.2 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).

CSR Documents

▼ Search Criteria

Document Search Criteria

Document Set: Recent documents Historical documents

From Team:

From Date: To Date:

Client Last Name: Client First Name:

Uploaded by: BRN:

Service Delivery Type:

Document Type:

Status:

Search Criteria

The ‘**From Team**’ drop down menu will display the list of Provider HPG Teams that the logged in Provider User is a member of and is associated with the CCAC of the selected client. The default ‘From Team’ will display the CCAC that owns the team

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

The Date Range fields will default one week from current date (e.g. Sept 20 – Sept 27). You can change the '**From Date**' and '**To Date**', however, it 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 one 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)

Service Delivery Type

Document Type

Status (defaults to Reviewed if in Historical CSR Upload Documents page)

Click  to view results.

CSR Documents

Search Criteria

Document Search Criteria

Document Set: Recent documents Historical documents

From Team:

From Date: To Date:

Client Last Name: Client First Name:

Uploaded by: BRN:

Service Delivery Type:

Document Type:

Status:

Search Results

#	BRN	Client Name	Service Delivery Type	Document Type	Update Date/Time	Uploaded By	Actioned By	Actioned Date/time	Status
1	101251	Training1 Kim	Outcome-Based Wound - sdi	CSR upload type	07-Mar-2013 11:48 AM EST	kimberly hanson-provider	Kimberly Hanson	07-Mar-2013 2:00 PM EST	Reviewed

Click  to clear search criteria (defaults restored, other fields empty).