



Health Partner Gateway Reference Guide for Health Partners

MODULE 4

Community Health Portal

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 4 – Updates to Client View tab – GUI/navigation enhancements

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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 Community Health Portal (CHP)

The Community Health Portal provides providers and hospitals with real time client information. The CHP uses the current Health Partner Gateway and CHRIS integration to permit authorized Health Partner users to see real time Active Client Information.

With this electronic exchange of information as part of the normal process of doing business, it is hoped that communication with partners can be more efficient and provide improved client care.

Providers and Hospital HPG users must be assigned the **Client Viewer** role in HPG in order to access the module. In HPG, the CHP is accessed via the Client View tab:



1.4 Module 4 Layout

This document is intended for **Health Partners** that are actively providing service to clients belonging to one or more CCACs. This document will address the following areas in HPG:

- Section 2: Client Search
- Section 3: Details tab
- Section 4: Shared Documents
- Section 5: Shared Notes

- Section 6: CSR Upload
- Section 7: Outcome-Based Pathways

Other modules available include:

- Module 1: Introduction to HPG (*available March 2013*)
- Module 2: Document Exchange (*available March 2013*)
- Module 3: Offer Management (*available March 2013*)
- Module 5: Referral Management (*available May 2013*)
- Module 6: Self-User Management (*available May 2013*)

2. CLIENT VIEW

The Community Health Portal (CHP) provides Providers and Hospitals with real time client information.

Providers and Hospital users must be assigned the **Client Viewer** role in HPG in order to access the module via the Client View tab:



The Client View (used interchangeably with CHP) provides the ability to search for a client by using search criteria and once in the context of a client's record, the module will provide access to client's details, shared documents and assessments, selected notes, and CSR Upload Documents – depending on the organization type.

Access to the Client View/CHP also provides access to Outcome-Based Pathways where providers are able to submit reports to and receive payment authorizations from CHRIS. Refer to [Section 9](#) for additional information on Outcome-Based Pathways.

There are five components to the Community Health Portal at present. These are:

1. **Client Details** – includes viewable information contained in the Client Summary (in the Details tab)
2. **Shared Documents** – available to only Providers, all documents that have been marked by CCAC staff as shared; within Shared Documents tab, **Shared Assessments** are also available to Providers & Hospitals (*includes reports from RAI CA, RAI HC Hospital and RAI HC Community*)
3. **Shared Notes** – includes all client notes marked by CCAC staff as shared.
4. **CSR Upload Documents** – the ability to upload client service related documents directly into the client's document library in CHRIS (*additional role assignments of Document Sender and Document Viewer must be granted to perform the functionalities in this tab*)
5. **Outcome-Based Pathways** –



For Shared Documents and CSR Upload Documents, the CCAC must have implemented Document Management System (DMS).

The Client information seen by provider and hospital users is slightly different.

Hospital users see:

- All Active Clients for the CCAC. I.e. All clients with an Admitted or Pending Referrals.
- No restricted access client information

Provider users see:

- Only Active clients who are assigned to the provider who is logged in
- Restricted access clients who are assigned to the logged in provider

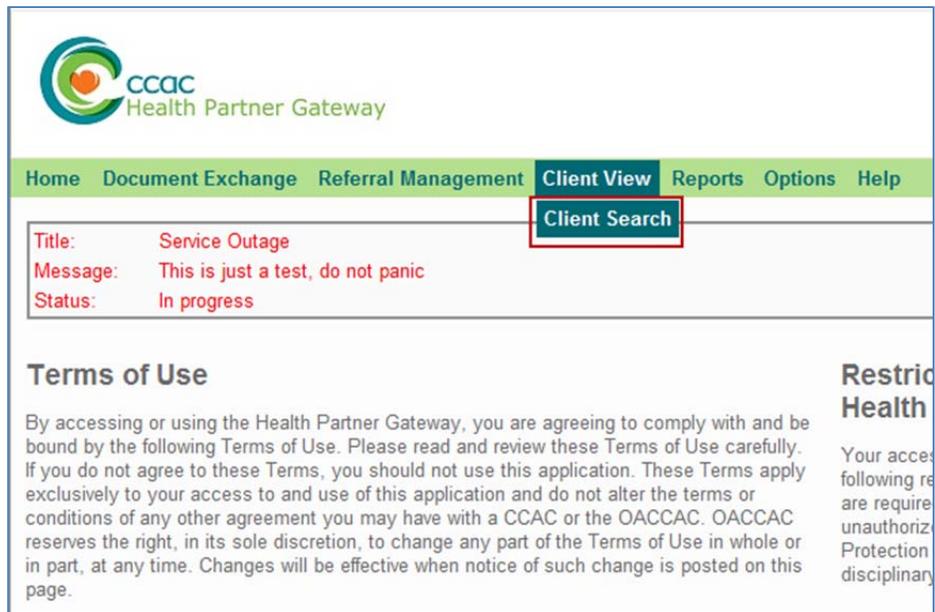
The CHP is configured locally by the CCAC which then grants privileges to the Provider and Hospital users who can view client information using this portal.

3. CLIENT SEARCH

3.1.1 Search for Information

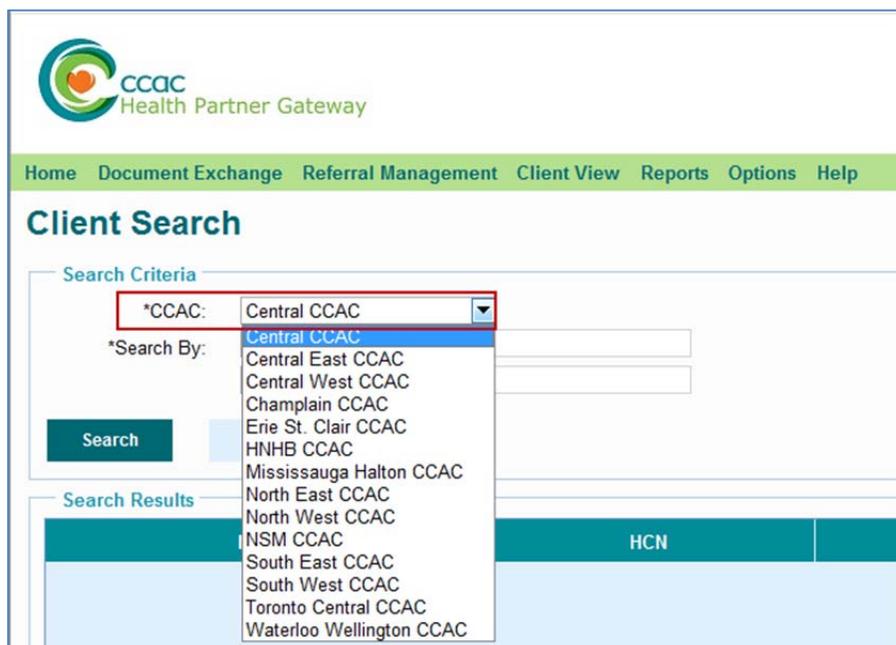
Provider or Hospital user Search for Client Information:

- Under the **Client View** tab, select the **Client Search** tab



HPG displays the **Client Search** page.

- Select the CCAC that is providing care to the Client from the drop down list of all CCACs.



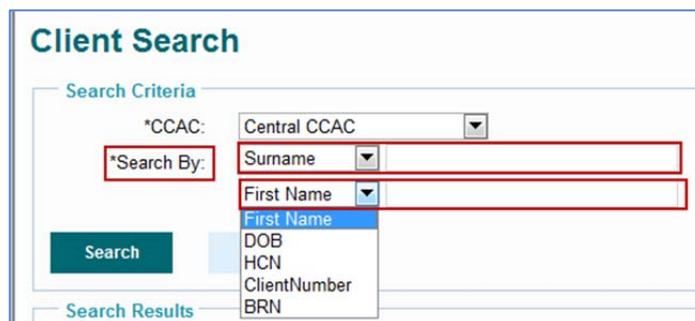
 Provider users will only see CCACs that their HPG team provides service to. Hospital users can search by all CCACs.

3. Use one or both of the two *Search By* fields which allow for searching by:

- Surname
- Firstname
- Date of Birth (DOB)
- Health Card Number (HCN)
- Client Number
- Billing Reference Number (BRN)

 If using the wildcard (*), the Community Health Portal only returns 200 records and you will not know that there are more than 200.

It is suggested that you refine your search with the Search By fields above.



The screenshot shows a 'Client Search' form. Under 'Search Criteria', there is a dropdown for '*CCAC:' set to 'Central CCAC'. Below it are two dropdowns for '*Search By:'. The first dropdown is set to 'Surname' and the second is set to 'First Name'. A 'Search' button is located below these fields. A dropdown menu is open below the 'First Name' field, showing options: 'First Name', 'DOB', 'HCN', 'ClientNumber', and 'BRN'. The 'Search Results' section is visible at the bottom of the form.

4. Once the Search parameters are set, select the  button.

The Community Health Portal presents a list of All the **Active** Clients from that CCAC that meet the search criteria.

The display varies with the Client View user:

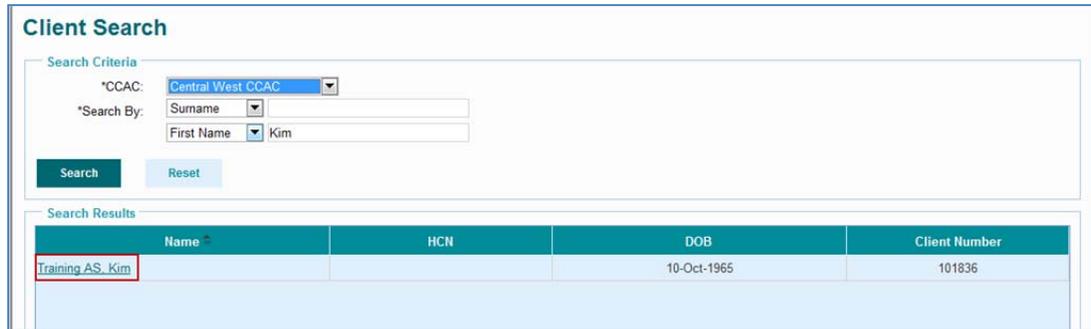
Hospital users see:

- All Active CHRIS Clients displayed in the list. (I.e. The client has Admitted or Pending Referrals)
- No Restricted Access client information

Provider users see:

- Only Active clients who are assigned to the provider who is logged in
- Restricted Access clients who are assigned to the logged in provider

5. Select the [Client Name](#) link from the list presented.



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

- *CCAC: Central West CCAC
- *Search By: Surname (dropdown)
- First Name: Kim

Buttons: Search, Reset

Search Results Table:

Name	HCN	DOB	Client Number
Training_AS_Kim		10-Oct-1965	101836

The Community Health Portal presents the client's information.

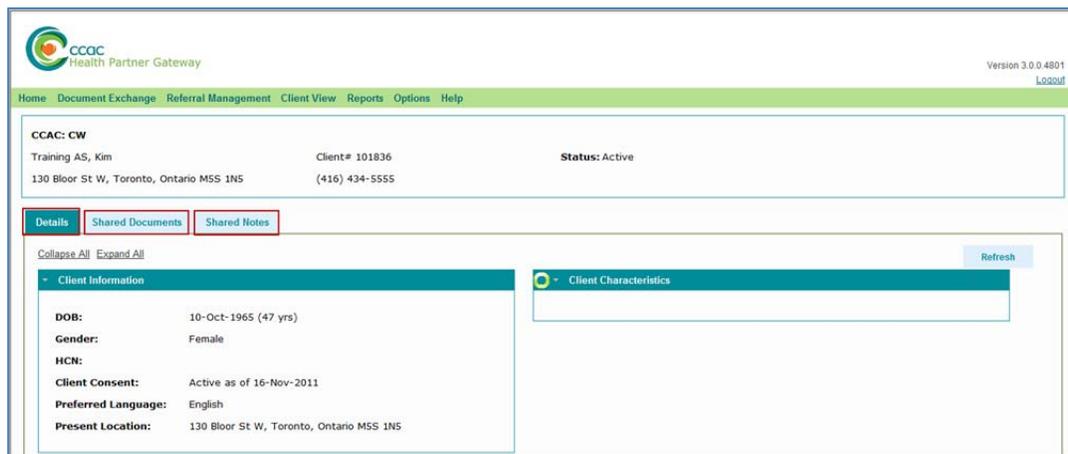
4. INFORMATION IN THE COMMUNITY HEALTH PORTAL

The Community Health Portal is currently configured to share information between CCACs and providers and between CCACs and hospitals. Each partner has a different view.

4.1.1 Information Viewed by Provider Users

Providers view only Active clients currently assigned to this provider including Restricted Clients. With this access the Provider has access to the following:

- Client Summary which displays in the **Details** tab
- Shared Documents
- Shared (Client) Notes



CCAC Health Partner Gateway

Version 3.0.0.4801
Logout

Home Document Exchange Referral Management Client View Reports Options Help

CCAC: CW
Training AS, Kim Client# 101836 Status: Active
130 Bloor St W, Toronto, Ontario M5S 1N5 (416) 434-5555

Details Shared Documents Shared Notes

Collapse All Expand All Refresh

Client Information

DOB: 10-Oct-1965 (47 yrs)
Gender: Female
HCN:
Client Consent: Active as of 16-Nov-2011
Preferred Language: English
Present Location: 130 Bloor St W, Toronto, Ontario M5S 1N5

Client Characteristics

⚠ Until your CCAC deploys Document Management, the provider user will only see two tabs: **Details** and **Shared Notes**.

Discharged clients show in the search results for a specific time frame (to be determined), but no client information is displayed.

4.1.2 Information Viewed by Hospital Users

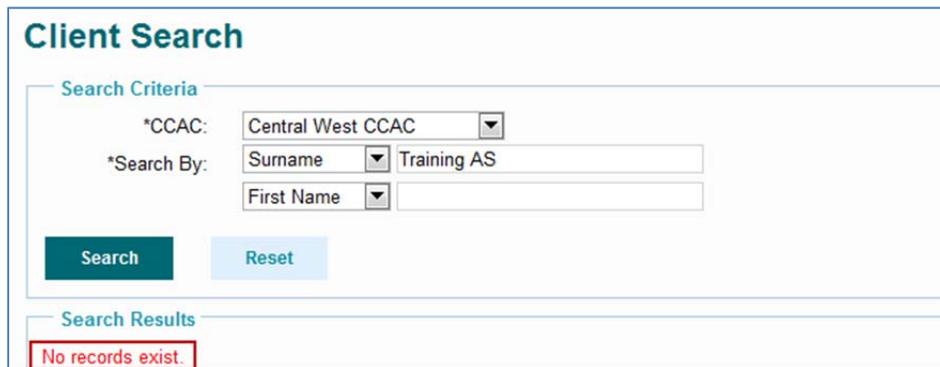
The hospital user has access to **all Active** CCAC Clients with one exception - restricted access clients are not displayed.

After the hospital user locates the client record, HPG presents three tabs:

- **Details**
- **Shared Documents**
- **Shared Notes**

 Hospital users do not have access to Document Sharing, even if the CCAC has implemented Document Management (DMS)

When the client CCAC File is closed and the client status becomes Inactive, the hospital user can no longer see any of this client's information using the Client View.



Client Search

Search Criteria

*CCAC:

*Search By:

Search Results

No records exist.

4.1.3 Update of Information in the CHP

The information in the Community Health Portal is updated as information is entered in CHRIS (real time). However, currently there is no notification when client information has changed in CHRIS and subsequently on the CHP.

Provider users can be notified of a change in Client information through the use of the Provider Notification

4.1.4 Timeout for CHP

If the provider or hospital user does not change the view of Client Information in the CHP, HPG provides a timeout feature forcing the user to sign in again. The time frame for the timeout is 20 minutes.

5. DETAILS TAB (CLIENT SUMMARY)

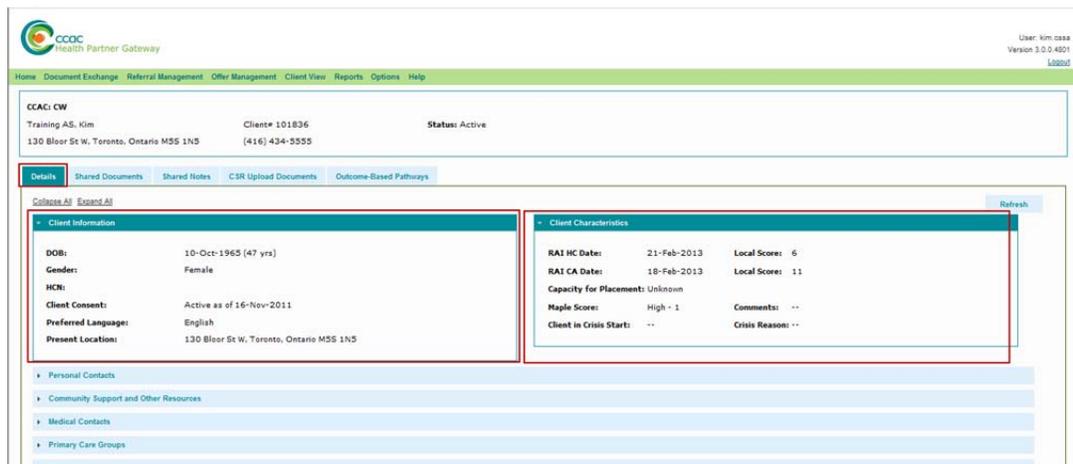
The default view when viewing client information is the **Details** tab. The information in the **Details** tab is the **Client Summary** view from the CHRIS Client level header. This information is presented in a view only mode i.e. there is no hyperlink into CHRIS for further information.

All active client information entered in the CHRIS client's file displays in the appropriate section. If the active client has no information documented, the section contains the phrase, "No data exists".

Only the most recent Care Plan note and Community Support note display.

In the future, a client who has an Inactive Client File in CHRIS will be displayed for providers for a limited time.

Below is an example of the Details tab information:



The screenshot shows the 'Details' tab for a client. At the top, it displays 'CCAC: CW' and 'Training AS: Kim'. Below this, it shows the client's name 'Kim', client number '101836', and status 'Active'. The address is '130 Bloor St W, Toronto, Ontario M5S 1N5' and the phone number is '(416) 434-5555'. The page is divided into several sections: 'Client Information', 'Client Characteristics', 'Personal Contacts', 'Community Support and Other Resources', 'Medical Contacts', 'Primary Care Groups', and 'Risks'. The 'Client Information' and 'Client Characteristics' sections are expanded, showing details like DOB, Gender, HCN, Client Consent, Preferred Language, Present Location, RAI MC Date, Local Score, RAI CA Date, Capacity for Placement, Maple Score, Client in Crisis Start, and Crisis Reason.

The Client View Details view includes the following sub sections. With the exception of Client Information, Client Characteristics and Services, all sections display in collapsed mode as a default. This update in HPG 3.0 has contributed to enhanced performance and speed.

Client Information

This area display demographics and Address information.



The screenshot shows the 'Client Information' section with the following details:

DOB:	10-Oct-1965 (47 yrs)
Gender:	Female
HCN:	
Client Consent:	Active as of 16-Nov-2011
Preferred Language:	English
Present Location:	130 Bloor St W, Toronto, Ontario M5S 1N5

Client Characteristics

Includes Assessment results:

Client Characteristics		
RAI HC Date:	21-Feb-2013	Local Score: 6
RAI CA Date:	18-Feb-2013	Local Score: 11
Capacity for Placement:	Unknown	
Maple Score:	High - 1	Comments: --
Client in Crisis Start:	--	Crisis Reason: --

Personal Contacts

Will only display the Active contacts for the client:

Personal Contacts				
Name	Relationship/Role/Legal	Phone	Consent to Share PHI	Consent Restrictions
Tin, Tin	Brother / Emergency Contact	(905) 555-5555	Share All PHI	--

Community and Other Resources

Will only display the Active resources for the client:

Community Support and Other Resources				
Organization	Contact Name	Phone	Consent to Share PHI	Consent Restrictions
Seniors First Care	Betsy	(555) 555-5555	Share No PHI	--
Miss Mary's Meal Delivery Service	Mary	(123) 546-7890	Share No PHI	--

Medical Contacts

Will only display the Active medical contacts for the client:

Medical Contacts					
Name	Specialty	Phone	Consent to Share PHI	Consent Restrictions	Comments
MANDEL, HOWARD	--	(416) 532-1939	Share All PHI	--	--
PORTER, GAIL	FAMILY MEDICINE	(905) 852-3339	Share All PHI	--	Family doctor

Primary Care Groups

Will only display the Active primary care groups:

Primary Care Groups		
Primary Care Group	Start Date	Additional Information
3101 BLOOR WEST MEDICAL GROUP FHG	01-Mar-2013	--

Risks

Will only display the Active risks:

Risks			
Risk Code	Description	Start Date	Additional Information
Hydro	Client is dependent on electricity for essential treatment modalities	01-Mar-2013	--
Inf Diseas	Infectious Disease - Please specify the specific illness in the Additional Risk Information field.	01-Mar-2013	MRSA
Pet	Vicious animal in the home.	01-Mar-2013	--

Allergies

Will only display the Active allergies:

Allergies					
Allergy Category	Allergy Name	Description	Severity	Start Date	Additional Information
Environmental	Silicone	break lubricant, breast implants, parchment paper	Unknown	01-Mar-2013	--
Drug	Aspirin	ASA; Acetylsalicylic acid	Unknown	01-Mar-2013	--

Safety Issues

Will only display the Active safety issues:

Safety Issues			
Safety Issue	Description	Start Date	Additional Information
Physical environment	--	01-Mar-2013	Hoarder
Someone other than client smoking in the home	--	01-Mar-2013	Roommate who smokes

Care Plan Note

Includes the date and displays the most recent for active CCAC file. If no note is documented in the current CCAC file time frame, "No Care Plan Note exists" displays. If the client is Inactive, this section is blank even if there is a Care Plane note:

Care Plan Note as of 01-Mar-2013
NOTE DATE: 01-Mar-2013
Client Need: Rehabilitation Services
Date Need Identified: RAI CA completed on 02-21-2013
Client/Family/Community Support: lives with roommate not supportive, client mostly alone
Service Type/Treatment Goals : refer to service referral
Expected outcome: Community Independence 3-6 months, Note Created:01-Mar-2013 11:29 AM EST

Community Support Note

Displays the most recent for active CCAC file. If no note is documented in the current CCAC file time frame, "No Care Plan Note exists" displays. If the client is Inactive, this section is blank even if there is a Care Plane note:

Community Support Note as of 01-Mar-2013
NOTE DATE: 01-Mar-2013
The community support note is also intended to be shared through CHP for providers and hospitals. This note should outline any external resources to the CCAC that assist and contribute to the client's overall careplan.
Your CCAC may decide to configure a template to ensure all appropriate information is captured., Note Created:01-Mar-2013 11:18 AM EST

Client Diagnoses

Will only displays the Active diagnoses (ICD-9 code or case manager description of no ICD-9 code):

Client Diagnoses			
DX Code	Description	Start Date	Additional Information
Uncoded	Infected wound right arm	01-Dec-2010	--
Uncoded	delayed motor skills	09-Dec-2010	--

Referrals

Will display Pending and Admitted Referrals:

Referrals							
Referral Type	Referral Date to CCAC	Admit Date	SRC	CM Only	Team	Caseload/Care Coordinator	Status
Supportive Housing BRN:104057	19-Feb-2013	19-Feb-2013 Primary DX: --	39-Referred In-No Recovery	No	Primary:North Team Secondary: --	Primary:PalliativeA (Hanson, Kimberly; Lewis, Vickie) Secondary: --	Admit
Community Services BRN:104064	19-Feb-2013	19-Feb-2013 Primary DX: --	39-Referred In-No Recovery	No	Primary:North Team Secondary: --	Primary:PalliativeA (Hanson, Kimberly; Lewis, Vickie) Secondary: --	Admit
Short Stay Respite BRN:102569	13-Dec-2010	-- Primary DX: --	--	No	Primary:North Team Secondary: --	Primary:Robertson, Susan Secondary: --	Pending
School BRN:102554	09-Dec-2010	09-Dec-2010 Primary DX:delayed motor skills	92-Rehabilitation	No	Primary:North Team Secondary: --	Primary:LewisVicki North (Lewis, Vickie) Secondary: --	Admit
Long Term Placement BRN:102557	30-Nov-2010	09-Dec-2010 Primary DX: --	47-Residential Long Stay	No	Primary:North Team Secondary:North Team	Primary:LewisVicki North (Lewis, Vickie) Secondary:RoberSusan (Robertson, Susan)	Admit
Home Care	30-Nov-2010	01-Dec-2010 Primary DX:infected	92-Rehabilitation	No	Primary:North Team Secondary:North	Primary:LewisVicki North (Lewis, Vickie) Secondary:PalliativeA (Hanson, Kimberly;	Admit

Secondary Team will display if applicable. If the Referral is Pending the Assessing Team displays. Primary Caseload/Case Manager displays and Secondary if it exists. If the Referral is Pending, the Assessing CM displays.

Services

Services for all Referral Types display. Active and Future Frequencies display:

Services							Details
Referral Type	Service Delivery Type	Initial Auth Date	Wait List Flag	Assigned Provider	Provider End Date	Active Frequency	
Home Care	Nursing - Visit home	18-Feb-2013	No	Baxter Order of Nurses	21-Jul-2013		
Home Care	Nursing - Visit Palliative	25-Feb-2013	No				
School	Nursing - Visit private/home school	11-Feb-2013	No	HPG-P-01-DO-NOT-TOUCH	23-Apr-2013		

Equipment Rentals

Displays the active rentals, including line items that are Requested, Approved, Ordered or Capped (no End Date):

Equipment Rentals					
Referral Type	Item Description	Start Date	Estimated End Date	Vendor Name	Status
Home Care	3200 - Walker - Folding	01-Mar-2013	28-Mar-2013	Happy Path	Ordered
Home Care	3102 - Aluminum Crutches	01-Mar-2013	28-Mar-2013	Happy Path	Ordered

Purchases

Includes Approved and Requested within the last 30 days:

Purchases (in the last 30 days)					
Referral Type	Item Description	Qty	Delivery pick up Date	Vendor Name	Status
Home Care	1501 - Toilet Seat Raised With Arms	1	01-Mar-2013	Happy Path	Ordered
Home Care	3309 - Foam Seat Cushion	3	01-Mar-2013	Happy Path	Ordered

LTCH Choices and Bookings

LTCH Choices and Bookings							
Referral Type	Rank	Associated CCAC	LTC Home	Waitlist Date	Accommodation	Priority	Status
Long Term Placement	4	CW	Peel Manor	19-Feb-2013	Basic Semi-Private Private	2	LTCH Applied
Long Term Placement	3	TC	Kensington Gardens Health Centre	18-Feb-2013	Basic Semi-Private Private	4B	LTCH Applied
Long Term Placement	2	TC	Fudger House	18-Feb-2013	Basic Semi-Private Private	4B	LTCH Applied
Long Term Placement	1	HNHB	Cedarwood Village	18-Feb-2013	Basic Semi-Private Private	4B	LTCH Accepted

5.1.1 Navigating the Details Tab

The Client Summary information displays in the Details tab in the Expanded/Collapsed view described above. Although there is no link to more information in CHRIS, the provider or hospital user has the ability to expand the information in the panes in order to view more information. There are three options to change from the default view:

- Use the [Collapse All](#) or [Expand All](#) hyperlink



- Use the  or 
- Click anywhere on the title band



6. SHARED DOCUMENTS

The Shared Documents enhancement in CHRIS requires that Document Management System (DMS) be implemented at the CCAC. Documents within the client's document library that are marked to be "shared" makes it available for you (Provider User) to view in HPG within the CHP. Shared Documents are not available for Hospital Partners.

A new section found in the Shared Documents section includes **Shared Assessments**. DMS does not need to be implemented in order for a CCAC to Share a client's Assessment tools. This functionality is available to the Provider and Hospital user.

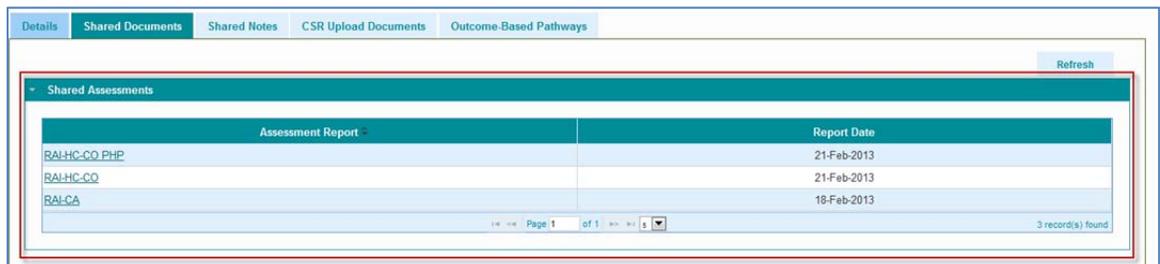
Open the **Shared Documents** tab:



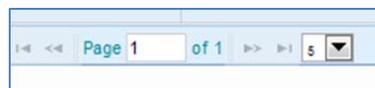
6.1.1 Shared Assessments

The most recently Completed & Locked Assessments are available to be viewed/saved for client's who have authorized Assessment Sharing with providers and hospitals.

The Shared Assessments tab can be Expanded or Collapsed:



At the bottom of the Shared Assessment Report table you can navigate through additional pages when more than three Assessment Reports are shared.

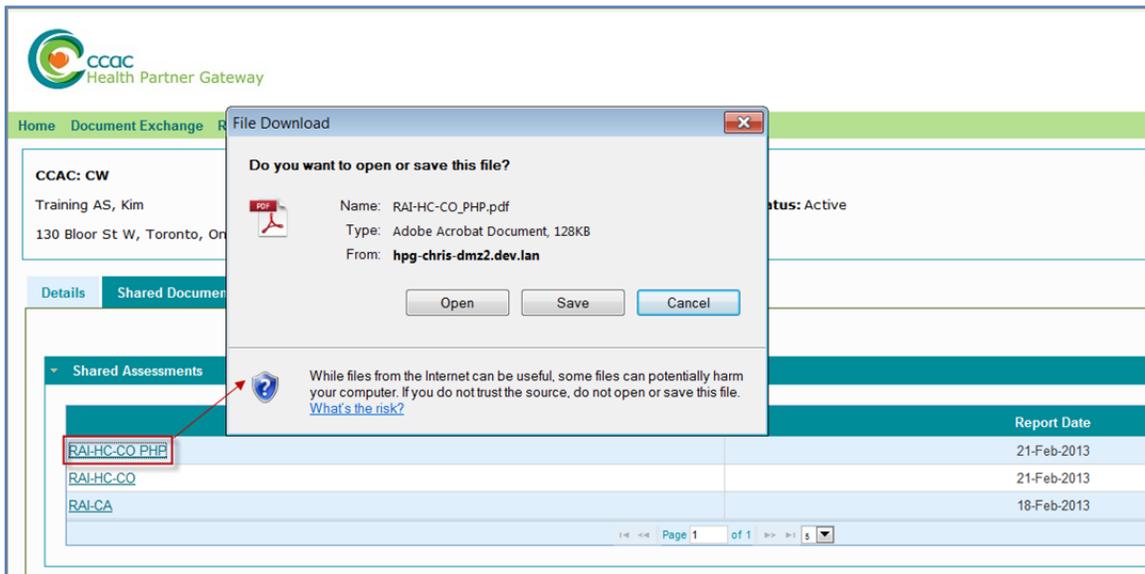


Open or Save Shared Assessment Reports by Clicking on the [Assessment Report](#) link.

Assessment Report	Report Date
RAI-HC-CO-PHP	21-Feb-2013
RAI-HC-CO	21-Feb-2013
RAI-CA	18-Feb-2013

Page 1 of 1 3 record(s) found

A pop up window appears for you Open or Save the report as PDF



All Assessment Reports and Tools are available to Providers and Hospitals when shared from CHRIS; this includes:

- RAI-CA
 - Full report
- RAI-HC Community
 - Full Report & PHP only
- RAI HC Hospital
 - Full Report & PHP only

6.1.2 Searching for Shared Documents

Shared Documents			
Search Criteria			
From Date:	30-Nov-2012	To Date:	01-Mar-2013
Category:		Time Zone:	EST
Document Name:			
<input type="button" value="Search"/> <input type="button" value="Reset"/>			

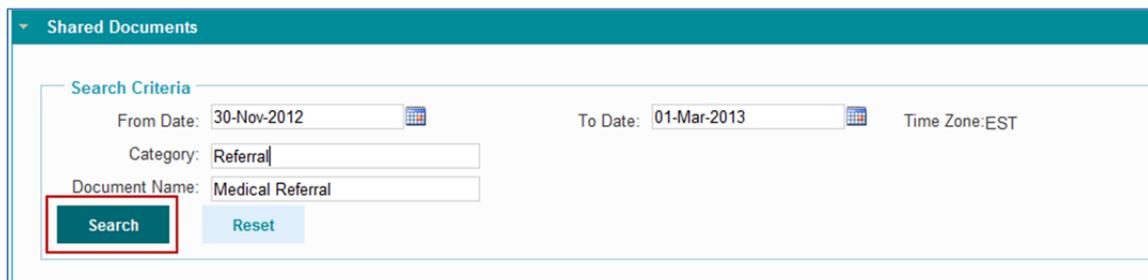
The following **Search Criteria** can be used:

Date Range – indicate the '**From Date**' and '**To Date**' to find shared documents that fall within the date range.

Category – select the Document Category from the drop down list

Document Name – type in the Document Name if known.

Select 



Shared Documents

Search Criteria

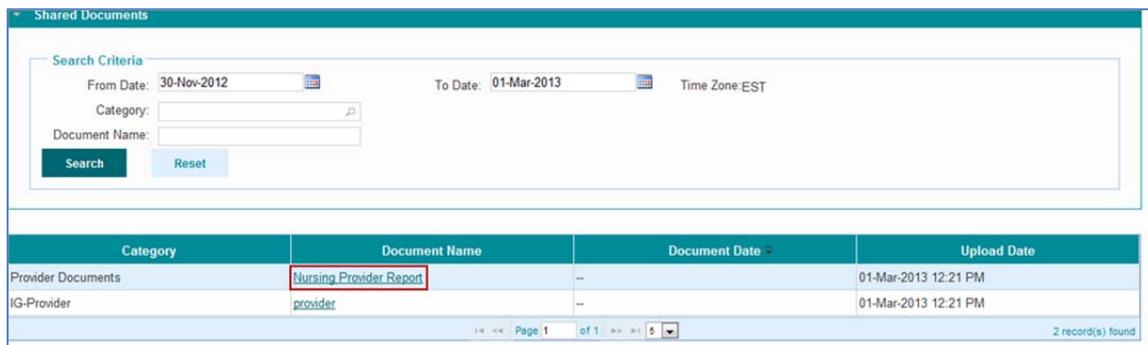
From Date: 30-Nov-2012 To Date: 01-Mar-2013 Time Zone: EST

Category: Referral

Document Name: Medical Referral

Search **Reset**

Select the document you want to view from the results list:



Shared Documents

Search Criteria

From Date: 30-Nov-2012 To Date: 01-Mar-2013 Time Zone: EST

Category:

Document Name:

Search **Reset**

Category	Document Name	Document Date	Upload Date
Provider Documents	Nursing Provider Report	--	01-Mar-2013 12:21 PM
IG-Provider	provider	--	01-Mar-2013 12:21 PM

Page 1 of 1 2 record(s) found

The search results in the above example were searched by date range only.

6.1.3 Referral Package

When a Provider receives a Referral Package Notification (refer to [Section 11.2.4](#)) after having accepted a Service Offer, the user would find the documents identified in the notification in the **Shared Documents** tab in the CHP. You would select the [Client Details](#) hyperlink within the notification to open the CHP:



The screenshot displays the CCAC Health Partner Gateway interface. At the top left is the CCAC logo. Below it is a navigation menu with the following items: Home, Document Exchange, Referral Management, Offer Management, Client View, Reports, Options, and Help. The main content area shows client information for a client named Kim AS, Training AS. The client's address is 130 Bloor St W, Toronto, Ontario M5S 1N5. The client number is 101836 and the phone number is (416) 434-5555. The status is listed as Active. At the bottom of the client information section, there are five tabs: Details, Shared Documents, Shared Notes, CSR Upload Documents, and Outcome-Based Pathways. The Shared Documents tab is highlighted with a red border.

Navigate to the **Shared Documents** tab and search for the documents identified in the notification using the Search Criteria.

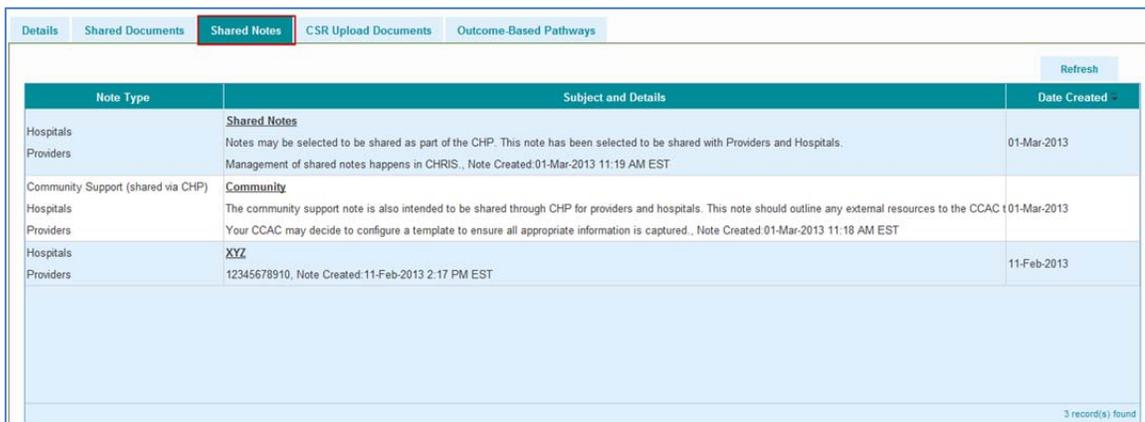
7. SHARED NOTES

CHRIS Client notes can be shared with providers and hospital Client View users if the CCAC Client Services user indicates this in CHRIS.

The most recent Client Care Plan Note and the Community Support Note are already displayed in the Client Summary under the Details tab and are shared with provider users and hospital users who have access to the CHP. Therefore it is not necessary to share the Client Care Plan Note and Community Support Note in this manner. The Shared Notes are in addition to these notes.

In CHRIS, the CCAC user indicates that a Client Note is shared with Provider and Hospital Client View users by using a new section titled: **Sharing Privileges**.

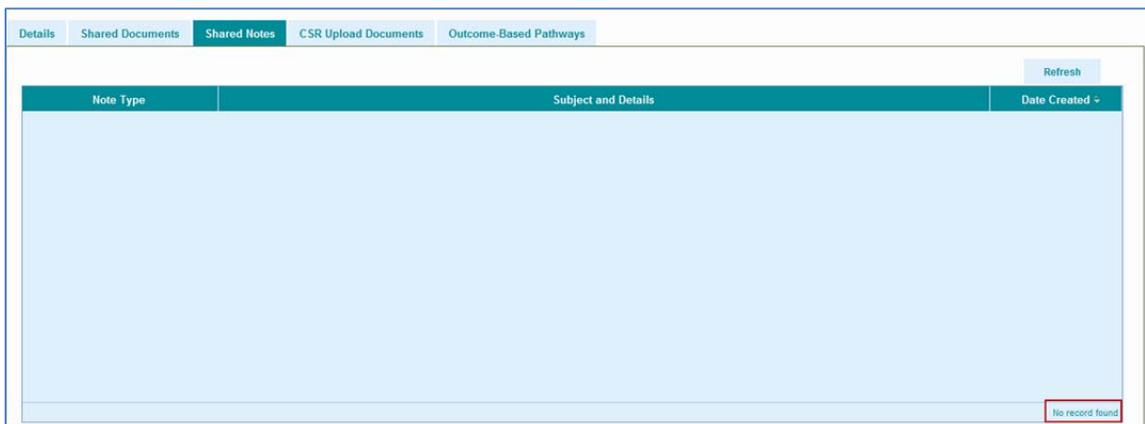
The provider or hospital Client Viewer can now see the note under the **Shared Notes** tab.



Details Shared Documents Shared Notes CSR Upload Documents Outcome-Based Pathways		
		Refresh
Note Type	Subject and Details	Date Created
Hospitals Providers	Shared Notes Notes may be selected to be shared as part of the CHP. This note has been selected to be shared with Providers and Hospitals. Management of shared notes happens in CHRIS. Note Created:01-Mar-2013 11:19 AM EST	01-Mar-2013
Community Support (shared via CHP)	Community	
Hospitals Providers	The community support note is also intended to be shared through CHP for providers and hospitals. This note should outline any external resources to the CCAC (Your CCAC may decide to configure a template to ensure all appropriate information is captured. Note Created:01-Mar-2013 11:18 AM EST	01-Mar-2013
Hospitals Providers	XYZ 12345678910. Note Created:11-Feb-2013 2:17 PM EST	11-Feb-2013

3 record(s) found

When no notes are shared, the provider/hospital user sees a message in the bottom right corner that states that No record Found.



Details Shared Documents Shared Notes CSR Upload Documents Outcome-Based Pathways		
		Refresh
Note Type	Subject and Details	Date Created

No record found

8. CSR UPLOAD DOCUMENTS

The CSR Upload functionality in HPG is made available only to Service Providers that are providing services to clients from one or more CCACs (Purchase Services only).

Provider users must be assigned the roles of Document Sender (to upload documents), Document Viewer (to view the history of uploaded documents) and Client Viewer (if uploading documents from CHP).

The CSR Upload functionality allows Providers to upload documents directly into the client's document library in the Document Management System (DMS) through HPG.

This enhancement improves documentation workflows between providers and CCACs. It supports the same document types for upload as DMS functionality.

The functionality occurs in HPG - either in the Community Health Portal (CHP), also called Client View or in Document Exchange. A history of the uploaded documents is retained and a notification is created in CHRIS along with a confirmation message to the Provider. A system generated task is sent to the client's primary caseload advising of the document upload.

The enhancement also features automatic linkages to uploaded documents viewable in CHRIS with a status report of changes, auto notification to providers, as well as system generated tasks sent to client's primary caseload advising of the document upload.

In HPG, CSR Upload functionality is available in 2 areas:

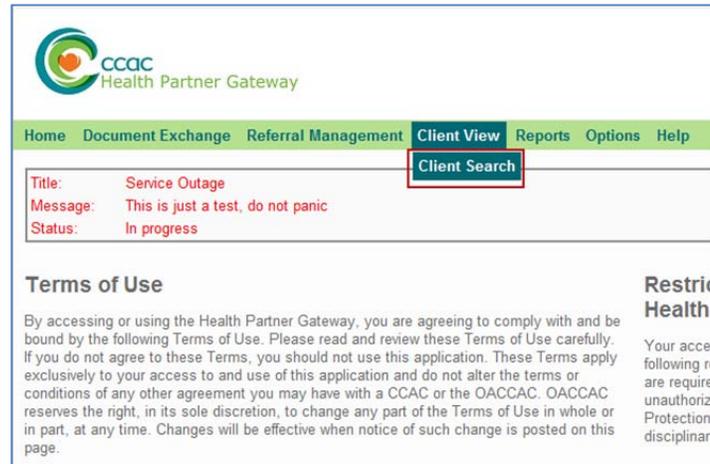
1. **CSR Upload Documents** tab in the Community Health Portal (CHP)
2. Send Documents section of **Document Exchange** tab

Providers are able to upload documents to any active client they are providing service for at a CCAC that has implemented CSR Upload Enhancement. Each CCAC has the ability to define how many days past service discharge that a Provider will have the ability to send documents against that service (setting determined in CHRIS Maintenance by Application Administrator). Once the number of days is past, the Provider Users will no longer be able to send CSR Upload Documents to that service.

8.1 CSR Upload from the Community Health Portal

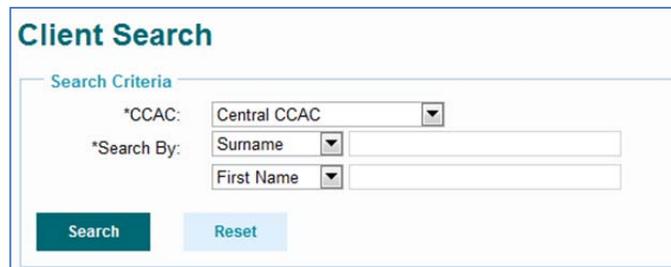
A Provider User with a **Client Viewer** + **Document Sender** role can access the **CSR Upload Documents** tab in the CHP.

1. Select 'Client Search' from the Client View drop down menu in HPG:



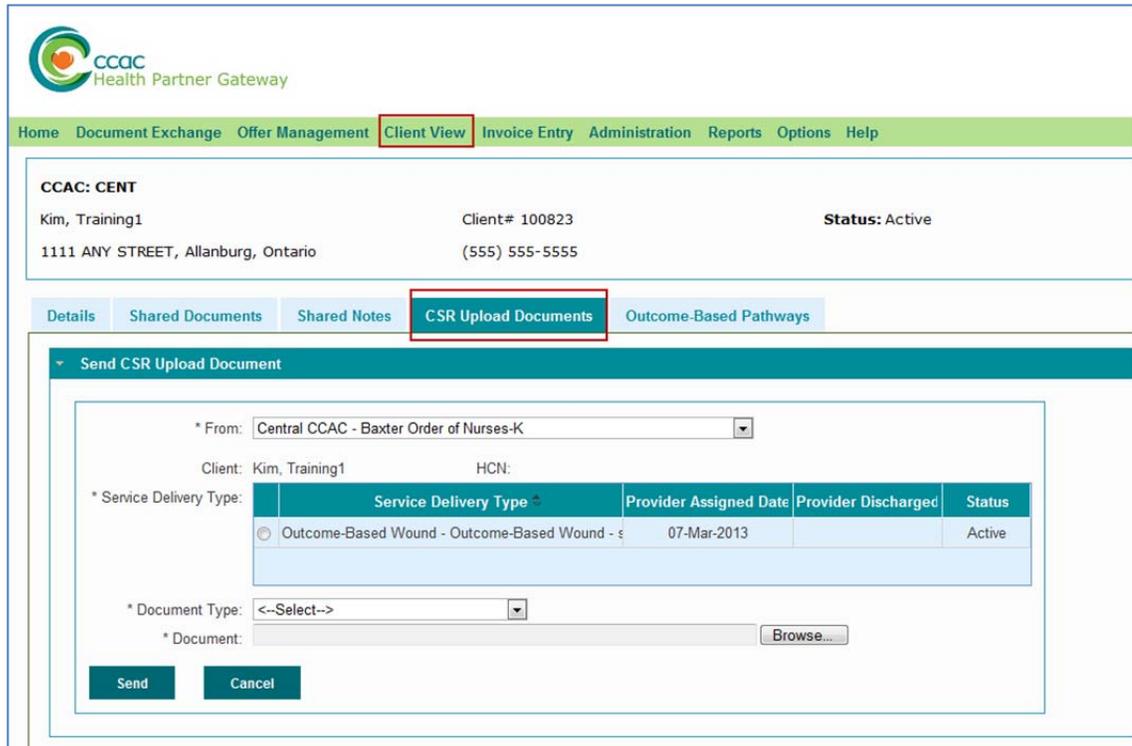
2. Use the Search Criteria on the Client Search page to find the client you are uploading documents for. Select from the drop down menu the CCAC that the client belongs to in the **CCAC** field (mandatory). There are two 'Search By' filters you can use to find your client. Each filter can be searched by the following criteria: Surname, FirstName, DOB, HCN, Client Number or BRN. You can use one or both filters (the second filter further narrows the search).

From the results list, select your client.



The screenshot shows the 'Client Search' form. It has a title 'Client Search' and a section 'Search Criteria'. Under 'Search Criteria', there is a field for '*CCAC:' with a dropdown menu showing 'Central CCAC'. Below that is a field for '*Search By:' with two dropdown menus: 'Surname' and 'First Name'. There are two input fields next to the 'Surname' and 'First Name' dropdowns. At the bottom of the form, there are two buttons: 'Search' and 'Reset'.

The Client Summary view (**Details** tab) will display for the selected client. Select the **CSR Upload Documents** tab.



The screenshot shows the 'Health Partner Gateway' interface. The 'Client View' tab is selected. Client information for 'Kim, Training1' is displayed, including address and phone number. The 'CSR Upload Documents' tab is active, showing a form to 'Send CSR Upload Document'. The form includes a 'From' dropdown menu, client details, a 'Service Delivery Type' table, a 'Document Type' dropdown, and a 'Document' input field with a 'Browse...' button. 'Send' and 'Cancel' buttons are at the bottom.

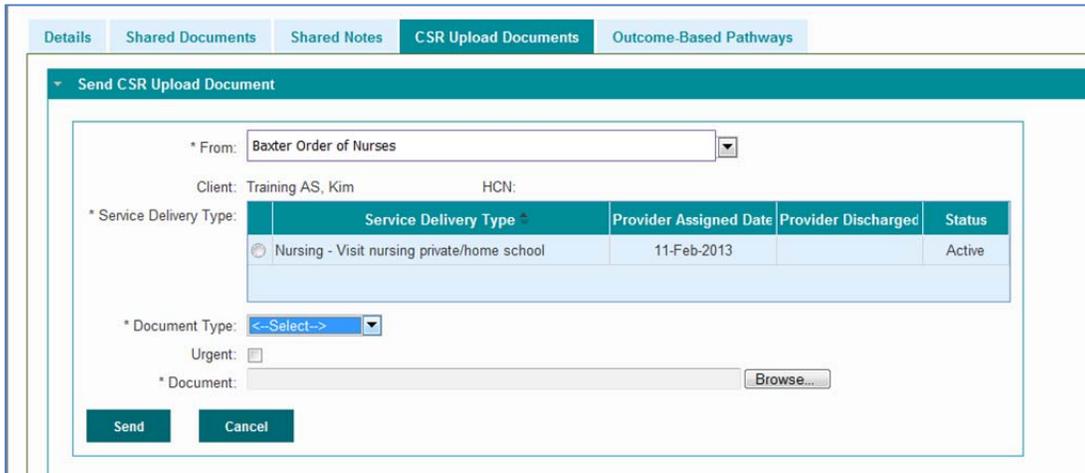
Service Delivery Type	Provider Assigned Date	Provider Discharged	Status
Outcome-Based Wound - Outcome-Based Wound - ε	07-Mar-2013		Active

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.

The '**Service Delivery Type**' section displays a list of service delivery types that the provider is currently providing (or has provided) to the client. Each service listed represents a specific instance of a service delivery type that the provider (that has been selected in the 'From Team' field) is providing or (has provided) to the client. The list includes services that the provider is:

- Currently providing (active service)
- No longer providing (discharged service) but the date of uploading the document falls within the '# of days past service discharge' window

The data elements shown in this list field include the Service and the **Service Delivery Type**. This field is mandatory and the user may only select on option in this field. When an option is selected using the radio button, the **Provider Assigned Date** (or **Provider Discharge Date**, if applicable) as well as **Status** will be populated (either Active or Discharged).



The screenshot shows a web interface for sending a CSR Upload Document. It features several tabs: Details, Shared Documents, Shared Notes, CSR Upload Documents (selected), and Outcome-Based Pathways. The main form area is titled 'Send CSR Upload Document' and contains the following elements:

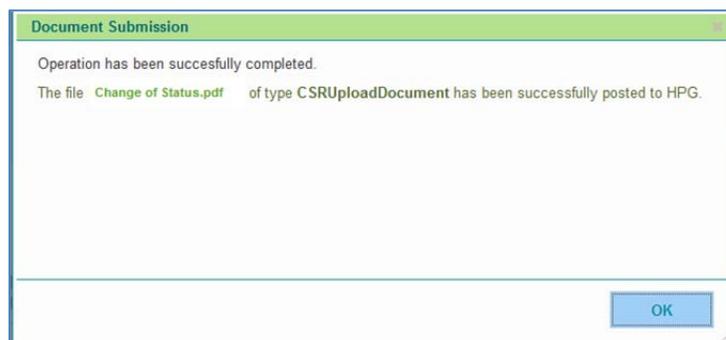
- * From: Baxter Order of Nurses (dropdown menu)
- Client: Training AS, Kim HCN:
- * Service Delivery Type: A table with columns for Service Delivery Type, Provider Assigned Date, Provider Discharged, and Status. The row shows 'Nursing - Visit nursing private/home school', '11-Feb-2013', and 'Active'.
- * Document Type: <--Select--> (dropdown menu)
- Urgent:
- * Document: Browse...
- Buttons: Send, Cancel

The **Document Type** drop down list displays all document types available to the provider to send as a CSR Upload Document. Options displayed are the Document Types the CCAC has created and indicated are available to the Provider to send CSR Upload Documents. The Document Types listed correspond to the CCAC of the client selected. The user may only select one option in this mandatory field.

An **Urgent** checkbox is available if this feature is turned on by the CCAC. It is selected by the Provider User if the document being uploaded requires urgent attention.

The **Document** field (mandatory) displays the path to the document that has been selected for upload. Only one document can be selected. Browse for the document that you want to upload to the client's document library and select it. Click 

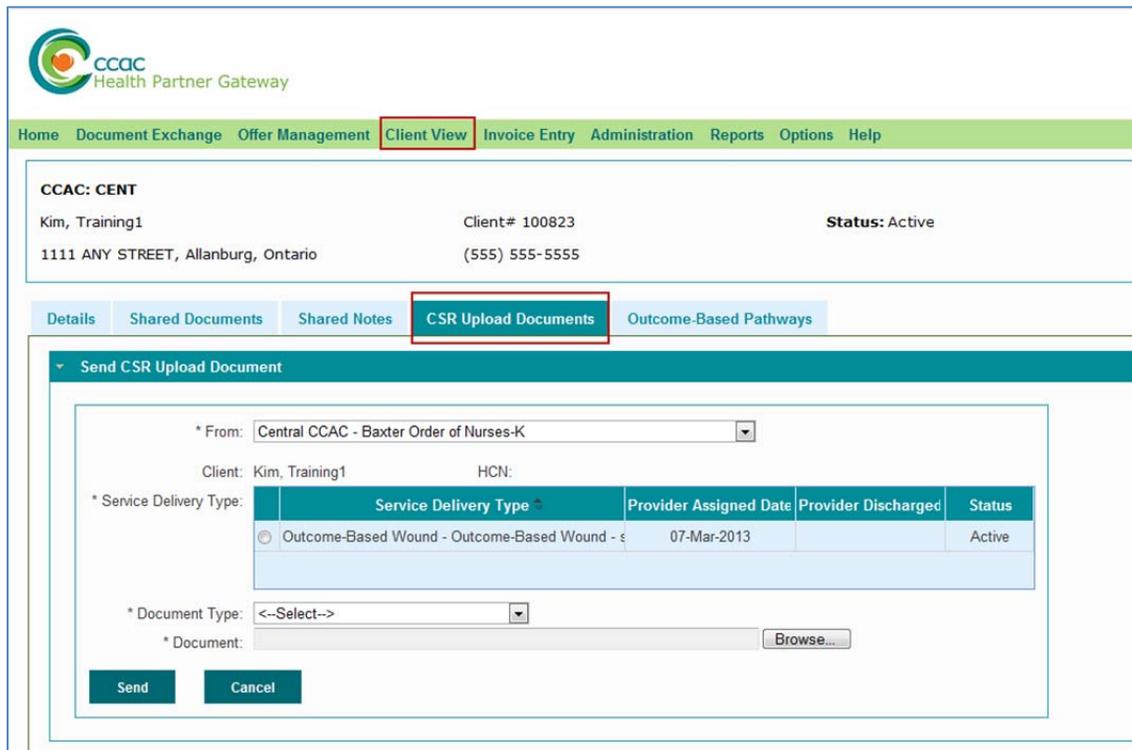
Upon successful upload, you will receive the following confirmation message:



-  The message confirms that the document has been successfully uploaded but does not address if it was successfully received in CHRIS.
-  CSR Upload does not support the following document formats: .exe, .bat, .bin, .sql, .cmd

8.2 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 CSR Upload Documents tab in **CHP**:

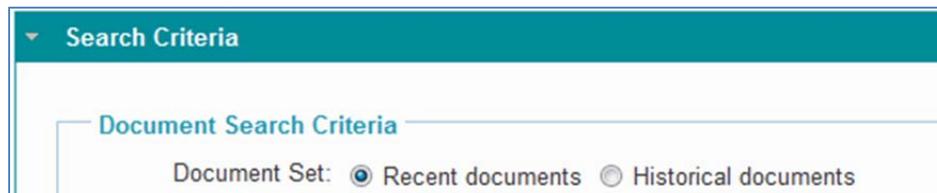


The screenshot shows the 'Health Partner Gateway' interface. The navigation menu includes 'Home', 'Document Exchange', 'Offer Management', 'Client View', 'Invoice Entry', 'Administration', 'Reports', 'Options', and 'Help'. The 'Client View' tab is active, displaying client information for 'CCAC: CENT' (Kim, Training1) with Client# 100823 and Status: Active. Below this, the 'CSR Upload Documents' tab is selected. A 'Send CSR Upload Document' dialog box is open, showing a table of service delivery types. The table has columns for 'Service Delivery Type', 'Provider Assigned Date', 'Provider Discharged', and 'Status'. One record is visible: 'Outcome-Based Wound - Outcome-Based Wound - s' with a date of '07-Mar-2013' and status 'Active'. There are also fields for 'From', 'Client', 'HCN', 'Document Type', and 'Document' with a 'Browse...' button. 'Send' and 'Cancel' buttons are at the bottom.

Provider User must have Document Viewer role view the CSR Upload Document History in the CHP as well as in Document Exchange.

The CSR Upload Document History is separated into two pages:

- Recent CSR Upload Documents
- Historical CSR Upload Documents



The screenshot shows a 'Search Criteria' dialog box. It has a title bar 'Search Criteria' and a section titled 'Document Search Criteria'. Below this, there is a 'Document Set:' label with two radio buttons: 'Recent documents' (which is selected) and 'Historical documents'.

By selecting a 'Reviewed' uploaded document record using the check box you can move a 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	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	07-Mar-2013 2:01 PM EST	Reviewed

The CSR Upload Documents History 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.

(Example above shows newest Upload Date/Time at the top and older ones below – this column had been re-sorted by clicking on the Upload Date/Time column header).

8.2.1 Recent CSR Upload Documents

When selected, the recent document upload history will display.

If accessing from within a client profile in CHP, the document list will be limited to those that have been uploaded for that specific client. 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 in CHP or in Document Exchange.

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.

#	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 Oversize	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	104726	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	Buld 3411	Shift home	- MG - Referral Level: New	10-Jan-2013 4:03 PM EST	Max Gromov	Insa Goldenberg	10-Jan-2013 4:07 PM EST	In Progress
66	104710	Jack Doe	Visit home	- MG - Client Level Oversize	05-Jan-2013 2:58 PM EST	Max Gromov	Yanbing Zou	11-Jan-2013 2:50 PM EST	In Progress
67	102397	Buld 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 CSRTest	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	Buld 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

Refer to [Section 8.2.2](#) 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.

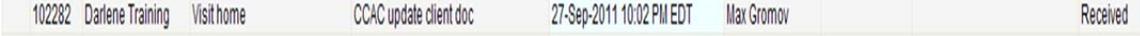
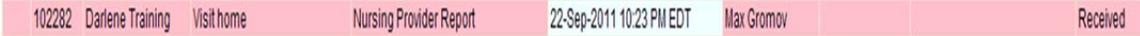
Each document uploaded is identified on each line with the following attributes:

- 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
	
Received (white)	Indicates that the document has been saved in DocuShare® and a link has been created in CHRIS.
	
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.
	
In Progress (yellow)	A document has been opened/viewed/processed and is in the process of being reviewed.
	

Reviewed (green)	Indicates that the CCAC 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).

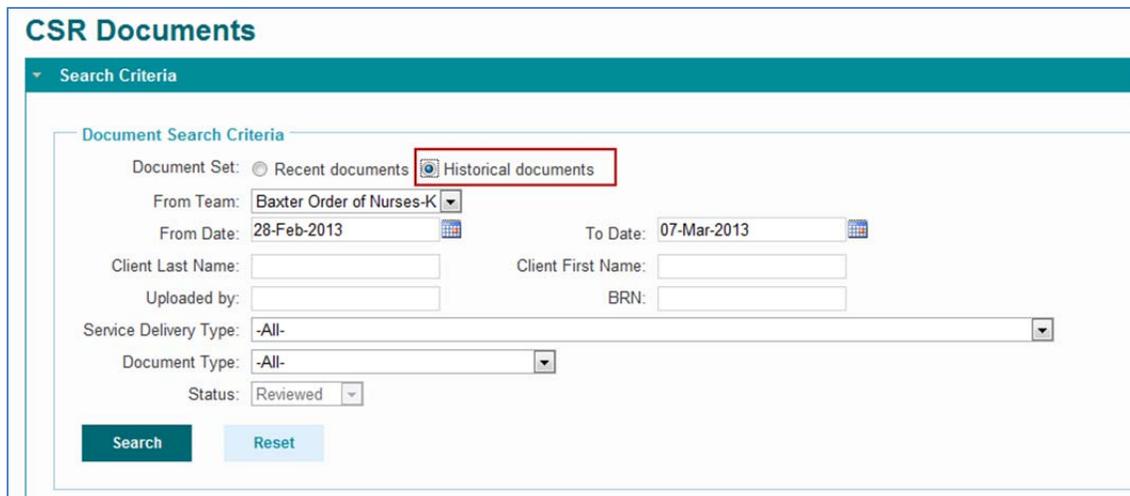
When the status changes to “Reviewed” in HPG, a check box opens in the first column for the Provider user to select the document upload record and move it to the Historical CSR Upload Documents. The document upload record will disappear from the Recent CSR Upload Documents list.

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

8.2.2 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: Baxter Order of Nurses-K

From Date: 28-Feb-2013 To Date: 07-Mar-2013

Client Last Name: Client First Name:

Uploaded by: BRN:

Service Delivery Type: -All-

Document Type: -All-

Status: Reviewed

Search Reset

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)

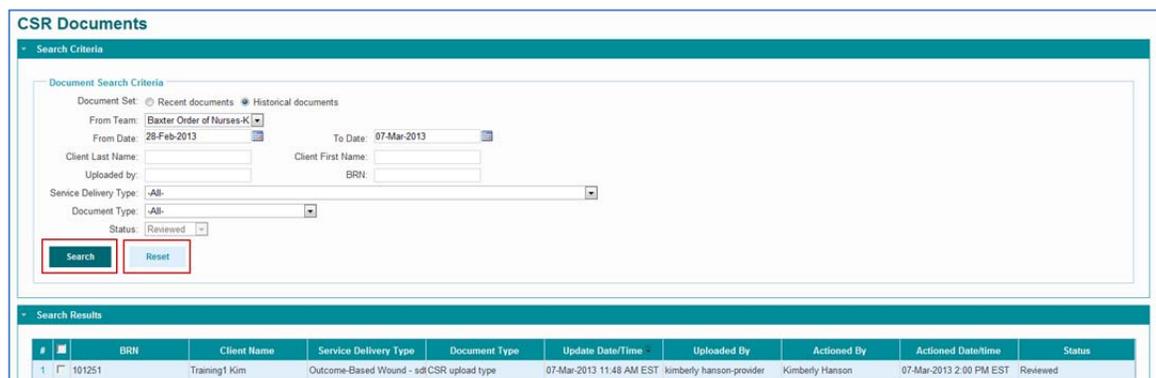
Uploaded by (First and Last name of the Provider User that uploaded the document)

Service Delivery Type

Document Type

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

Click  to view results.



The screenshot shows the 'CSR Documents' search interface. It includes a 'Search Criteria' section with the following fields:

- 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:

Below the search criteria are 'Search' and 'Reset' buttons. The 'Search Results' section shows a table with the following data:

#	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 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)

9. OUTCOME-BASED PATHWAYS

The Outcome-Based Pathway/Outcome-Based Reimbursement initiative is currently still in Proof of Concept phase and testing.

This document will be updated with detailed information once a release is scheduled for provincial roll-out.