HOME & COMMUNITY SUPPORT INNOVATION CENTRE

Health Partner Gateway (HPG)

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Introduction

Background & Overview

The Health Partner Gateway (HPG) provides a single solution to securely exchange health information between the Home and Community Care Support Services North East (HCCSS) and its partners. It was built to enable Health Partner access to client health information held within HCCSS tools and applications such as the Client Health and Related Information System (CHRIS).

HPG is implemented with CHRIS and serves as the Health Partner interface for Service Offers, Document Sharing, Orders, and Billing/Invoicing.

HPG is 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.

Overview of Functionality

HPG is one application, featuring a main area that links to each HCCSS. Each HCCSS 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 HCCSS network, logging in as a HCCSS user/HCCSS Admin user using Active Directory credentials
- Externally - from outside the HCCSS network – accessible via internet – logging in as a Health Partner user.

This reference guide will outline the functionalities within HPG for the External HPG User – i.e., health partner users that access HPG from outside the internal HCCSS network.

Each user is assigned an account type, team membership and role assignments that determine what that user can 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 HCCSS.

- A single user can belong to many teams.

- A team can have members (users) from other HCCSS networks.

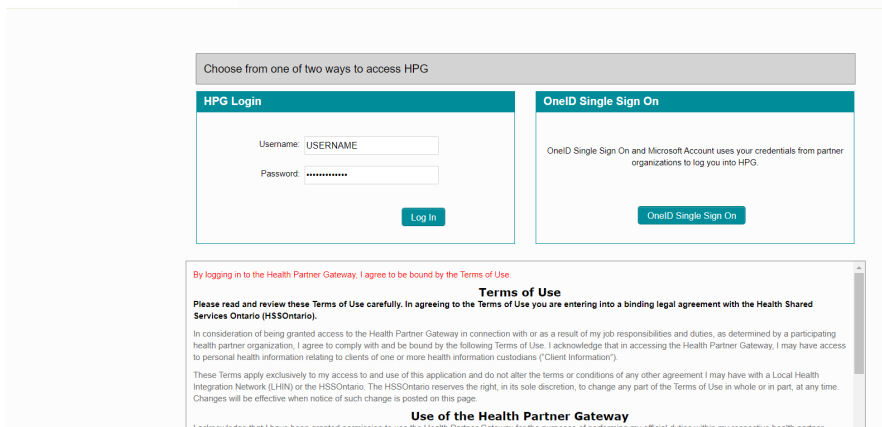- Teams are either designated as a HCCSS Team or a Health Partner Team.

Accessing HPG

Login

Enter the below URL address in your web browser:

https://hpg-chris.apps.HCCSS-ont.ca/Login.aspx

The login screen displays:

Enter the following:

Username – assigned to you by your organization; most will follow the convention: Firstname.Lastname

Password – when your account is first set up, you will be assigned a temporary password. You will be prompted to change your password the first time you login.

Passwords

When creating a new password, you must adhere to the following password rules:

Must contain a minimum of 12 characters and a maximum of 50.

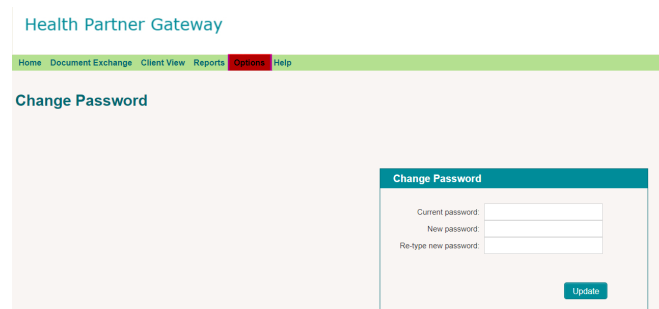Must <u>not</u> contain the user's name.

Must <u>not</u> contain any spaces.

Must contain characters from three out of the following four categories:

- Upper case characters (A - Z)
- Single digit numbers including zero (0 - 9)
- Lower case characters (a - z)
- Non-alphanumeric characters (!, $, &, @, *)

Changing Passwords

You can change your password at any time by selecting Options - Change Password on the navigation bar at the top of your screen and Complete the Change Password fields:

Failed Login

If you fail to login after 3 unsuccessful attempts, your account will become "locked".

You can either: Wait 20 minutes for the account to automatically unlock and try again; **or** contact your HCCSS Help Desk to have your HPG account manually unlocked.

Password Expiration

With HPG, the system enforces a password expiration policy. This means HPG monitors all Health Partner accounts and de-activates all accounts with passwords older than 365 days.

During login, HPG verifies the age of the password for the account and informs you if the password is set to expires in the next 10 days. This provides you with a reminder to change the password prior to the account being disabled.

Password History

This policy enforces the number of unique new passwords that must be associated with a user account before an old password can be reused. When you choose to or are required to change your password, the system ensures that you use a different password than the ones that have been used in the last 10 password changes.

If you attempt to use a previously used password (i.e. one of the last 10 passwords), the system will display a warning message: "Cannot reuse a previously used password".
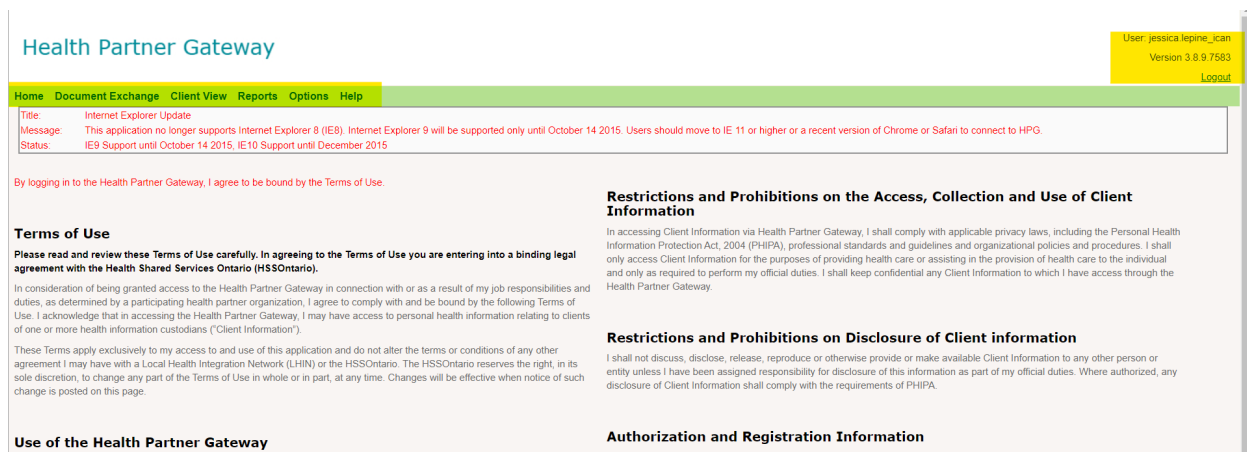
Account Expiration

This policy allows the HPG system to de-activate all accounts with no activity in the past 120 days. Unsuccessful activities (e.g. failed attempts to login) are not considered as legitimate activities for this policy.

Home

The home page screen is the initial screen displayed once you login to HPG, it displays the Terms of Use information.

The Terms of Use outlines the appropriate access and use of the HPG, restrictions and prohibitions to client data and on disclosure of client information.

NOTE: Since external HPG users do not require any specific software to be installed, it is important that health service providers have policies established to ensure that HPG is accessed by the appropriate people within the appropriate environments.

1. The main menu displays across the top of the page in the green bar, below the logo. (Highlighted in Yellow) The menu choices available depend on the role(s) that the user has been granted.

2. At the top right of the Home page, the Username of the person logged in will display and the current version of HPG will display beneath it. A user can log out of HPG immediately at any time by clicking on the 'Logout' link.

Note: If there are 20 minutes of inactivity, the session will time out automatically. You will then need to log in again.

Referral Management

The Referral Management tab in HPG enables Health Partners to manage electronic referrals (e-referrals) sent from a HCCSS user in CHRIS. Referral types that are managed in HPG Referral Management include:

- e-Referral to Long Term Care (LTCH)
- e-Referral to Complex Care Hospital
- e-Referral to Rehab Hospital
- e-Referral to Community Support Service Agencies Health Partners access e-Referrals in HPG Referral Management:
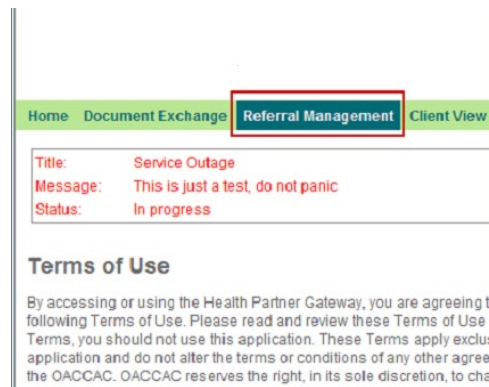
This allows the Health Partner user to:

- Search for Referrals.
- View the Waitlist.
- View Notification Logs.
- View Referral Details:
  - Client Information.
  - Referral Notification Log.
- View Referral Documents.
- Respond and update referral statuses.

Referral Status

There are four possible status categories for e-Referrals that are managed in HPG Referral Management:

- Awaiting Response
- Admitted
- Closed
- Waitlisted

Awaiting Response

Awaiting Response is the referral status assigned to any new referral created in CHRIS. This status indicates to the Health Partner that a response is required on the referral. Either from the Health Partner or from the HCCSS when 'Additional Information is requested'.

Admitted

A status of Admitted means that the client will be starting the community program or has been accepted to move into the residence. A HCCSS may set up some community referral types to automatically 'Close Upon Admission'. This means that the status will automatically change from Admitted to Close.

Closed

Means that the client no longer requires service related to the referral. This can be one of three reasons:

- the client withdrew their application prior to admission for service.
- the client was accepted/admitted to the service.
- the client was offered service and refused.

Waitlisted

Indicates that the agency has accepted the referral, but the client has not yet been admitted for service.
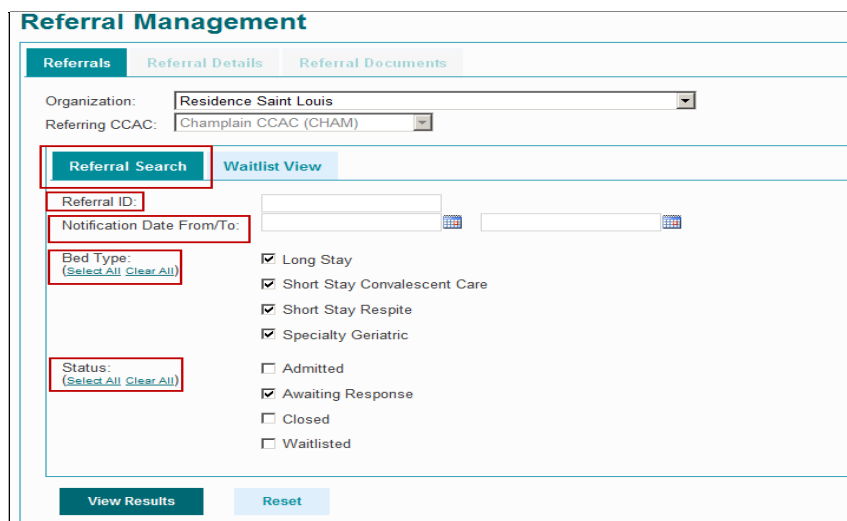
Referral Search

Search Criteria

When the Organization and Referring HCCSS is selected from the drop-down options, HPG displays the Referral Search tab to further refine your search results.

Available criteria include:

- Referral ID
- Notification Date From/To
- Bed Type or Service Type
- Status

To search for referrals:

1. Set the search criteria on the Referral Search page according to the table below.
2. Select **View Results** to see a list of referrals that match the refined criteria.
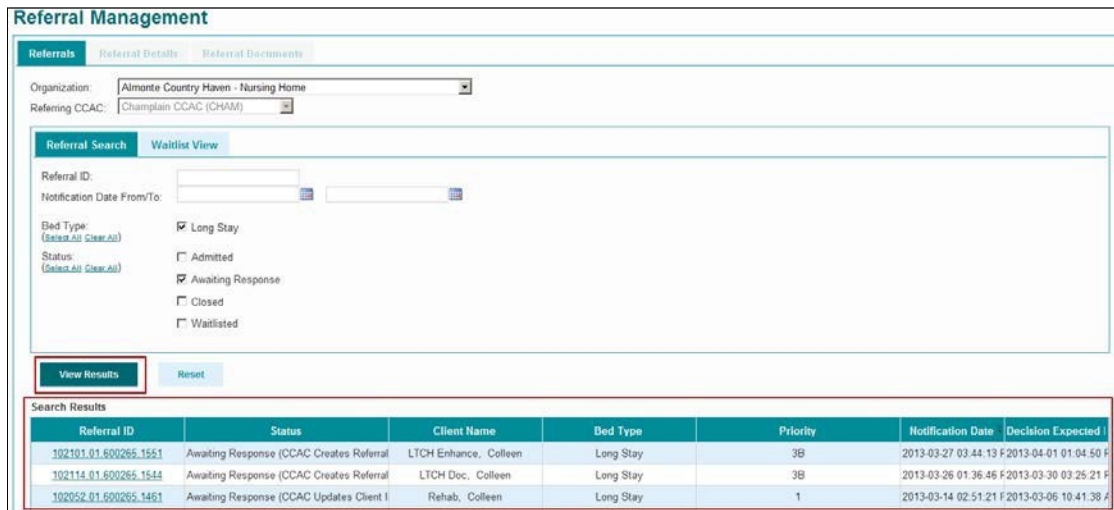
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Referral Search Criteria and Descriptions:

Criteria	Description/Comments
a) Referral ID	System generated identifier for the referral. If it is known, it can be entered here to find the specific referral.
b) Notification Date From/To	DD/MM/YYYY can be entered as an additional filter (calendar tool available). Select the dates to filter and display referrals based on the Notification Date - the date the notice was sent to the Health Partner.
d) Service Type (for Community referral types)	Multiple Check boxes available for Health Partners that offer more than one service type. Check the Service Type(s) that you wish to display in the Search Results. (**Select All**, **Clear All** available)
e) Status	Refers to the Referral Status, and defaults to 'Awaiting Response'. Other choices include Waitlisted, Admitted and Closed. Check the Status(es) that you wish to display in the Search Results. (**Select All**, **Clear All** available)

*Reset clears all criteria

Search Results

The information displays in the Search Results grid in several columns:

Referral ID – unique system generated identifier assigned to the client's referral. If you click on this link, the referral details for the selected referral will display in the Referral Details tab.

Status – displays the referral status followed by the most recent business action/event in brackets.

Client Name – the name of the referred client, in the format "Surname, First Name".

Bed Type (for LTCH, CC, Rehab referral types) – the name of the bed type related to the referral set in CHRIS.
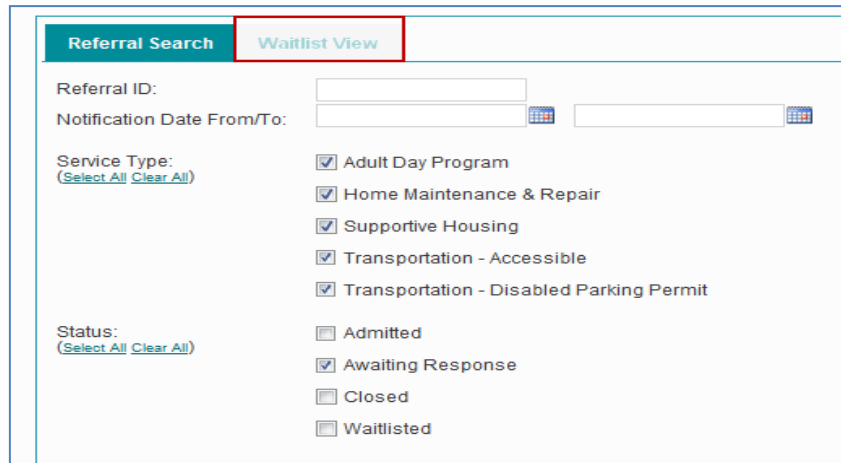
Priority (for LTCH Referral type only) – displays priority level assigned to the bed choice in CHRIS.

Notification Date – the date on which the most recent business event relating to the referral occurred.

Decision Expected By – the date by which the facility is expected to respond to a new/updated referral. This only applies to referrals in 'Awaiting Response' status.

Waitlist View
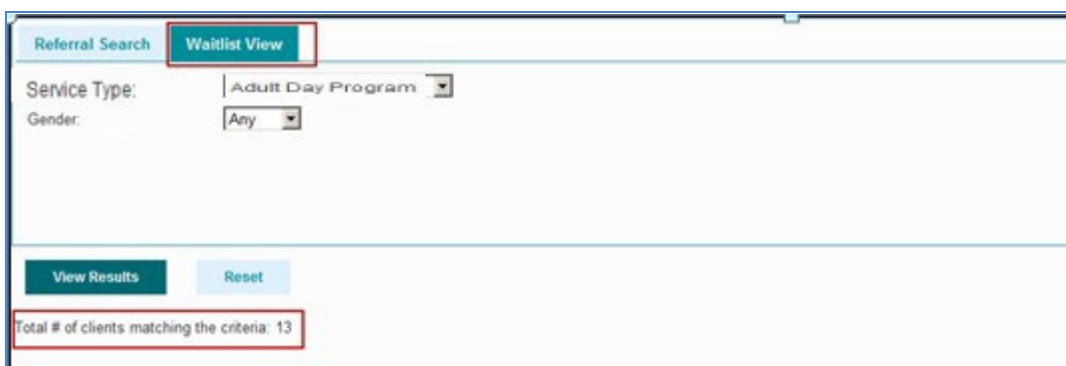
The Waitlist View tab is (greyed out) for community referral types.

The expanded role referral types (Adult Day Program, Assisted Living and Supportive Housing) have access to the Waitlist View tab.

You can refine the list using the **Filter Criteria** with the filters of:

- Service Type:
  - Options on the pick list are based on the Service Types available in the selected Agency or Residence.
  - You can only select one Service Type at a time.
- Gender:
  - Choices of Any, Female and Male.

Referral Details

The **Referral Details** tab allows you to view the details of the referral, the notification logs, as well as perform an action on the notification. The Referral Details tab is disabled (greyed out) on first entry until a referral is selected for viewing. Once you have opened the Referral Details view, you will be able to toggle between the Referral and Referral Details tabs without losing the focus/settings.

You can access the Referral Details tab by selecting the Referral ID link from the referral results:

Once the Referral ID link is selected, the Referral Details are displayed.

Referral Details Section

Organization – the name of CC/Rehab/LTCH Facility or Community Agency to which the client has been referred.

Address of the above organization.

Bed Type (for LTCH, CC, Rehab referrals) - type of bed client requires.

Priority (for LTCH, CC, Rehab referrals) - Priority of the choice entered in CHRIS.

Waitlist Date - the date the client is added to the waitlist.

Notes - additional information relevant to the referral.

Referral Date/Time - date and time when the referral was initially sent to the organization.

Referring HCCSS - the HCCSS that referred the client to the facility/agency.

HCCSS Team - the team at the HCCSS primarily responsible for the client.

Caseload - name of the primary caseload responsible for the client.

Care Coordinator - name of care coordinator responsible for the client.

Client Information Section

All information is derived from the Client Information screen in CHRIS; client identifiers, demographics, and selected information.

Health Profile - selected information taken from the Client Health Profile in CHRIS.

Health Profile			
Infection Status:	Clear from Infection		

Diagnoses:

Dx Code	Description	Start Date
Uncoded	Multiple Sclerosis	08-May-2013
Uncoded	COPD	08-May-2013

Surgical/Other Procedures:

Date	Code	Description

Allergies:

Category	Specifics	Additional Information	Start Date
Animal	Cat dander		08-May-2013

Contacts - contains Active Personal and Medical Contacts information derived from CHRIS.

Contacts				

Personal Contacts:

Name	Relationship/Role/Legal	Contact Restriction Details	Phone	Additional Information
May, Jane	Daughter / Caregiver - Informal / POA - Personal Care	Share All PHI	(454) 545-4545	

Medical Contacts:

Name	Specialty	Contact Restriction Details	Phone	Additional Information

Notification Log - records all the actions and updates sent/completed between the Health Partner and the HCCSS. It is located at the bottom of the Referral Details page.

Responding to Referrals

The Referral header in the Referral Details tab contains an Action drop down menu that enables the Health Partner to respond to a referral based on its current status;
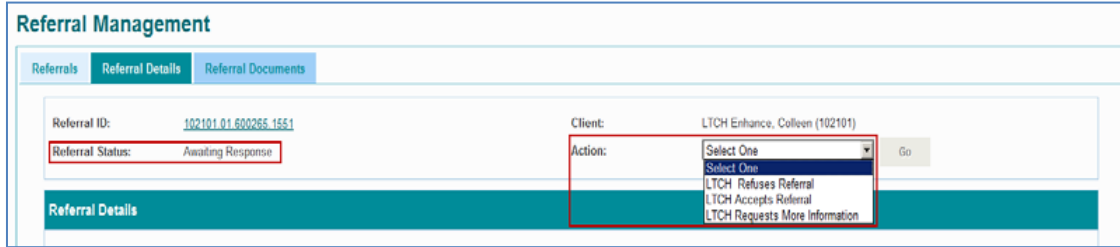

The following table displays all the possible actions for each CSSA referral status:

| Referral Status	Possible Actions
Awaiting Response	CSSA Accepts Referral
	CSSA Refuses Referral
	CSSA Admits Referral
Waitlisted	CSSA Admits Referral
Admitted	CSSA Discharges Referral
Closed	None

Referral Documents

As part of the e-Referral 'Referral Package', CHRIS users have the ability to share documents from their Document Management System (DMS) library and interRAI Assessments from PointClickCare. Only those documents and assessments associated with the referral will be displayed
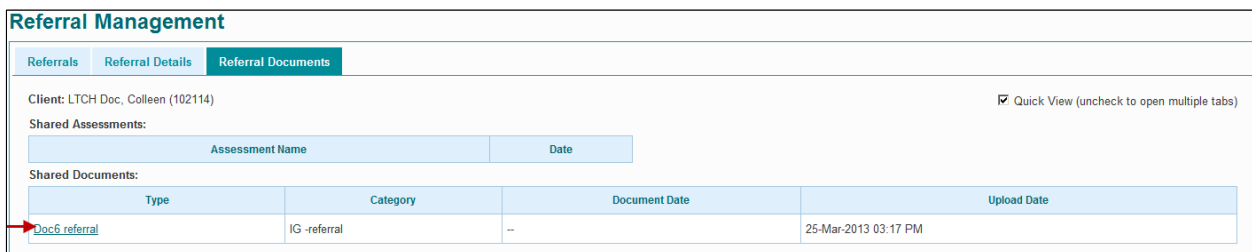
Email Notification

In order to make the referral and application process seamless, e-mail notifications may be enabled for the Health Partner user to be notified of any changes or updates made to the Referral application.

Example of email notification for a new Complex Care referral:
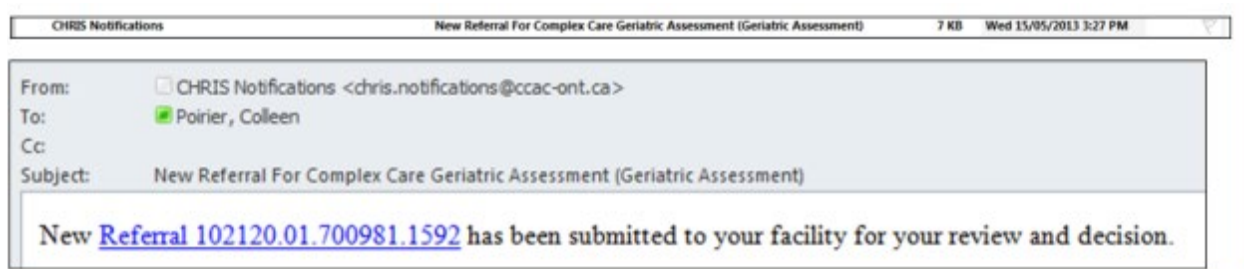
The **Referral ID** hyperlink sends you to HPG Referral Management for you to respond to the referral.

Email notifications will be sent for the following events:

- HCCSS creates a referral.
- HCCSS withdraws a referral.
- HCCSS send an update to the referral.
- HCCSS creates a data entry correction, i.e. status is rolled back.