

Health Partner Gateway (HPG)

Community Support Services User Guide

Version: January 2023



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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 of the HCCSS's. 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's
- Teams are either designated as a HCCSS Team or a Health Partner Team

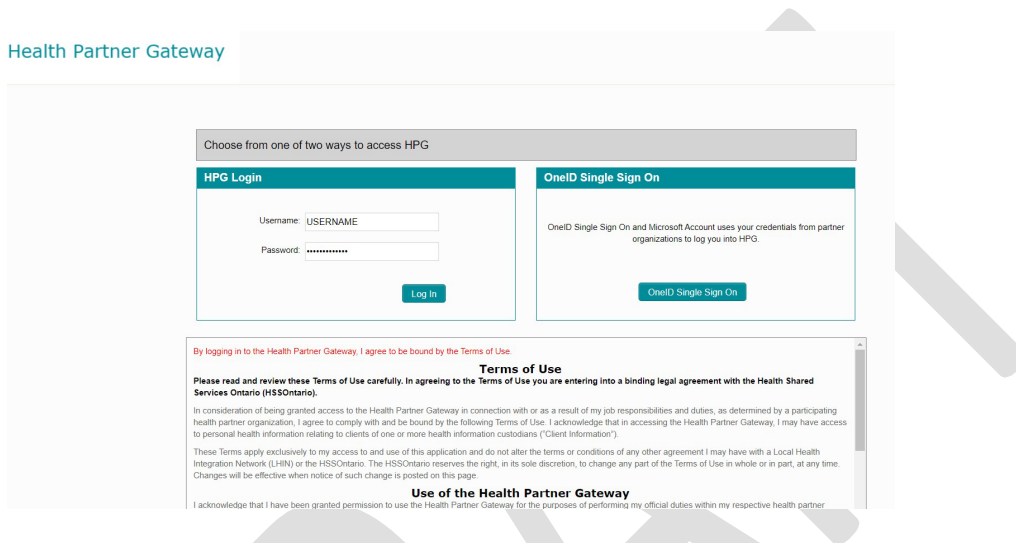
Accessing HPG

Login

Enter the below URL address in your current version of Internet Explorer:

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

The login screen displays:



The screenshot shows the Health Partner Gateway login interface. At the top, it says "Health Partner Gateway". Below that, a grey box prompts the user to "Choose from one of two ways to access HPG". There are two main options: "HPG Login" and "OneID Single Sign On".

HPG Login includes fields for "Username" (with "USERNAME" as a placeholder) and "Password" (with "*****" as a placeholder), and a "Log In" button.

OneID Single Sign On includes a "OneID Single Sign On" button and a note: "OneID Single Sign On and Microsoft Account uses your credentials from partner organizations to log you into HPG."

Below these options is a "Terms of Use" section. It starts with "By logging in to the Health Partner Gateway, I agree to be bound by the Terms of Use." and "Terms of Use". It states: "Please read and review these Terms of Use carefully. In agreeing to the Terms of Use you are entering into a binding legal agreement with the Health Shared Services Ontario (HSSOntario)." It then contains several paragraphs of fine print regarding access to personal health information and the HSSOntario's right to change terms.

At the bottom of the Terms of Use section is a "Use of the Health Partner Gateway" section with the text: "I acknowledge that I have been granted permission to use the Health Partner Gateway for the purposes of performing my official duties within my respective health partner organization."

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 not contain the user's name

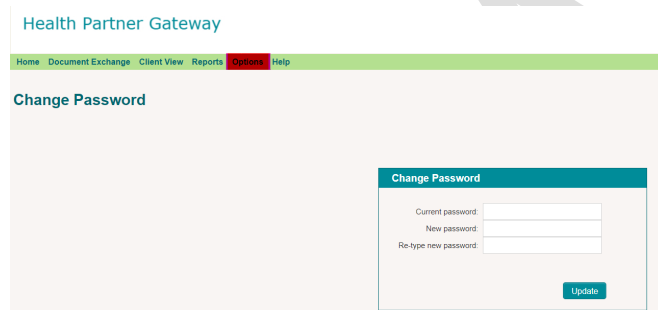
Must not contain any spaces

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:



The screenshot shows the 'Health Partner Gateway' interface. At the top, there is a navigation bar with links for 'Home', 'Document Exchange', 'Client View', 'Reports', 'Options', and 'Help'. Below this, the 'Change Password' page is displayed. It features a central form titled 'Change Password' with three input fields: 'Current password', 'New password', and 'Re-type new password'. An 'Update' button is located at the bottom right of the form.

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 password older than 365 days.

During login, HPG verifies the age of the password for the account and informs you if the password is about to expire within 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

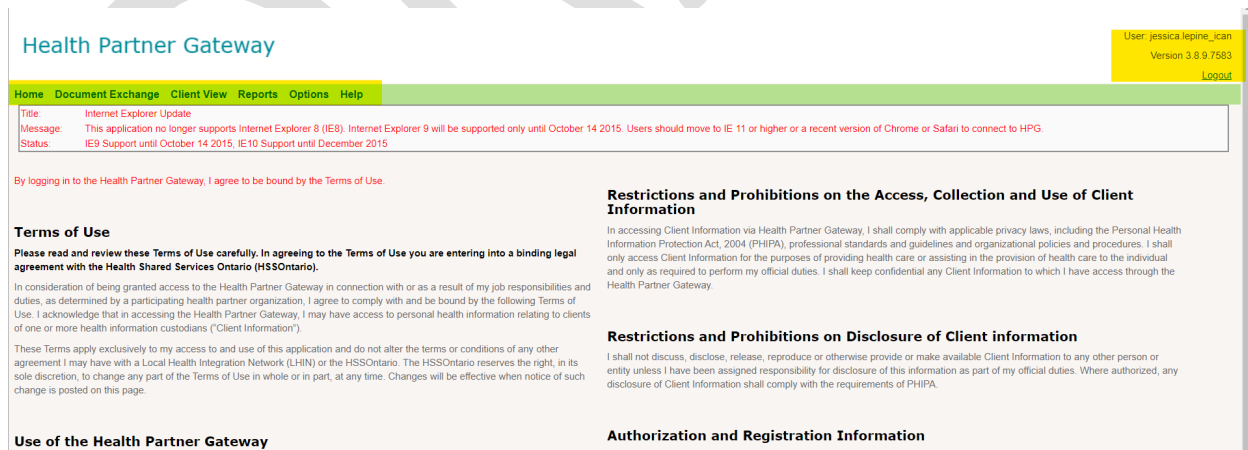
This policy allows the HPG system to de-activate all accounts with no activity for the past 120 days. Unsuccessful activities (e.g. failed attempt to login) are not considered as legitimate activities for this policy.

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.



The screenshot shows the Health Partner Gateway interface. At the top right, it displays the user name 'User: jessica.lepine_ican' and version 'Version 3.8.9.7583'. Below this is a 'Logout' link. A green navigation bar contains links for 'Home', 'Document Exchange', 'Client View', 'Reports', 'Options', and 'Help'. A message box indicates that Internet Explorer 9 is no longer supported and users should move to IE 11 or higher, or use Chrome or Safari. Below the message, there is a red warning: 'By logging in to the Health Partner Gateway, I agree to be bound by the Terms of Use.' The main content area is divided into several sections: 'Terms of Use' (with a sub-section for 'Please read and review these Terms of Use carefully...'), 'Restrictions and Prohibitions on the Access, Collection and Use of Client Information', 'Restrictions and Prohibitions on Disclosure of Client information', and 'Authorization and Registration Information'. The 'Use of the Health Partner Gateway' section is partially visible at the bottom.

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.

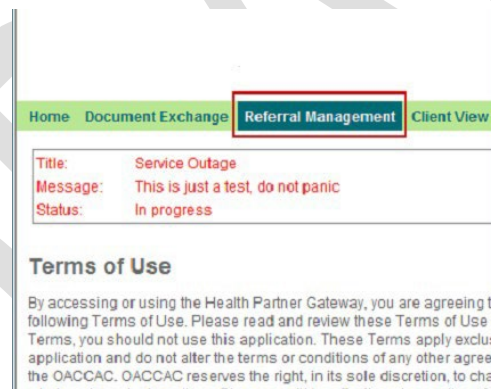
2. At the top right of the Home page, the Username of the person logged in will display and the current version of HPG will display beneath it. A user can log out of HPG immediately at any time by clicking on the 'Logout' link.

Note: If there is 20 minutes of inactivity, the session will time out automatically, and you will 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 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.

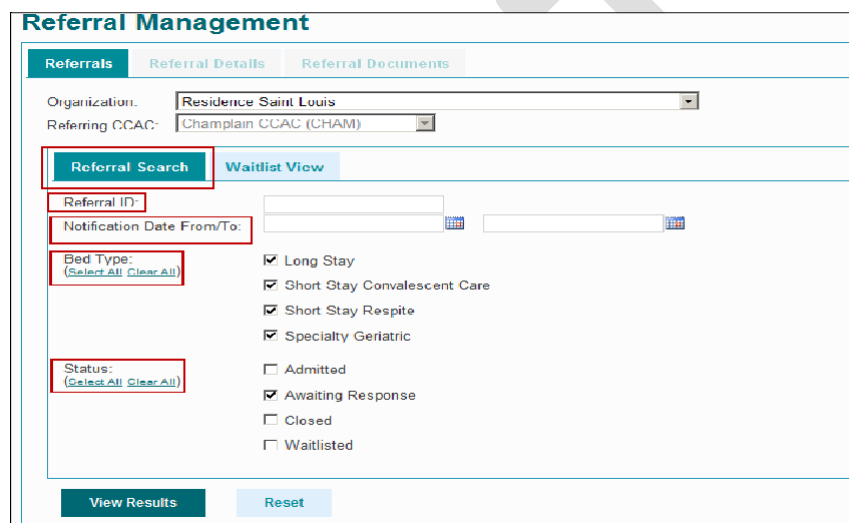
Referral Search

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



The screenshot shows the 'Referral Management' interface with the following search criteria filters:

- Organization: Residence Saint Louis
- Referring CCAC: Champlain CCAC (CHAM)
- Referral ID: [Empty field]
- Notification Date From/To: [Empty date range]
- Bed Type: (Select All) (Clear All)
- Status: (Select All) (Clear All)
- Service Type checkboxes:
 - Long Stay
 - Short Stay Convalescent Care
 - Short Stay Respite
 - Specialty Geriatric
 - Admitted
 - Awaiting Response
 - Closed
 - Waitlisted

Buttons: View Results, Reset

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.

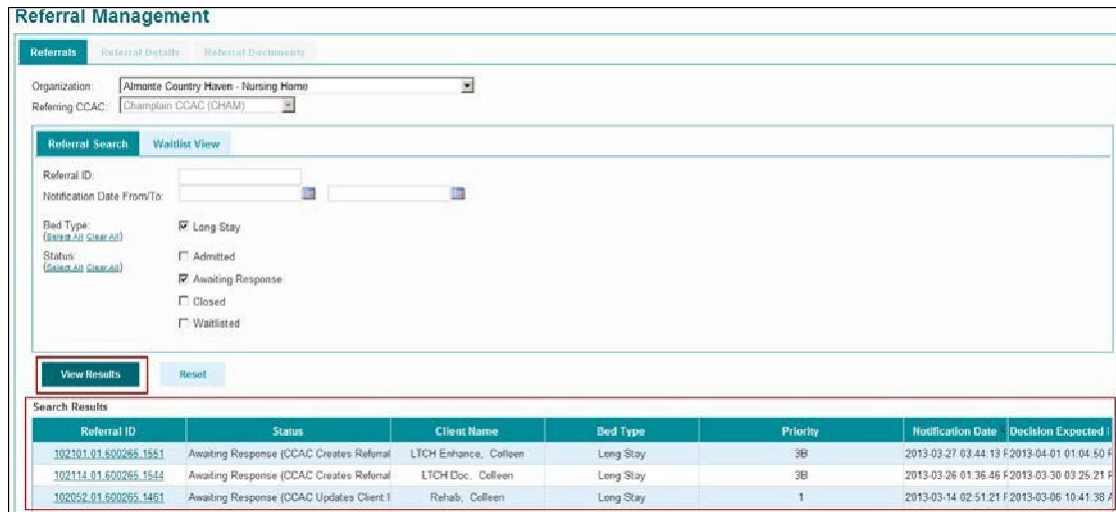
Referral Search Criteria and Descriptions:

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(s) 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:



The screenshot shows the 'Referral Management' interface. At the top, there are tabs for 'Referrals', 'Referral Details', and 'Referral Documents'. Below this, there are dropdown menus for 'Organization' (Alamonte Country Haven - Nursing Home) and 'Referring CCAC' (Champlain CCAC (CHAM)).

The 'Referral Search' section includes a 'Referral ID' field, a 'Notification Date From/To' range selector, and a 'Bed Type' dropdown menu. The 'Status' section has several checkboxes: 'Long Stay' (checked), 'Admitted', 'Awaiting Response' (checked), 'Closed', and 'Waitlisted'.

Below the search filters are 'View Results' and 'Reset' buttons. The 'View Results' button is highlighted with a red box.

The 'Search Results' table is displayed below the filters. It has the following columns: Referral ID, Status, Client Name, Bed Type, Priority, Notification Date, and Decision Expected. The table contains three rows of data:

Referral ID	Status	Client Name	Bed Type	Priority	Notification Date	Decision Expected
102101.01.600265.1551	Awaiting Response (CCAC Creates Referral	LTCH Enhance, Colleen	Long Stay	3B	2013-03-27 03:44:13 F	2013-04-01 01:04:50 F
102114.01.600265.1514	Awaiting Response (CCAC Creates Referral	LTCH Doc, Colleen	Long Stay	3B	2013-03-26 01:36:45 F	2013-03-30 00:25:21 F
102052.01.600265.1461	Awaiting Response (CCAC Updates Client I	Rehab, Colleen	Long Stay	1	2013-03-14 02:51:21 F	2013-03-06 10:41:38 F

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

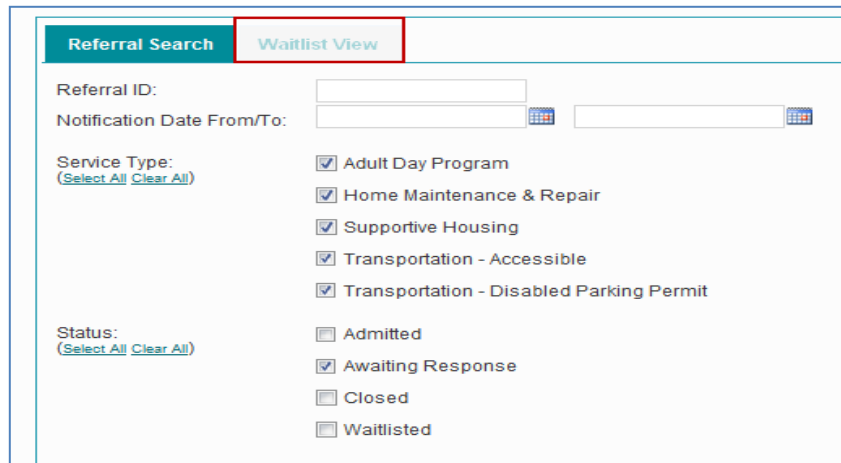
Priority (for LTCH Referral type only) – displays priority level assigned to the bed choice in CHRIS

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

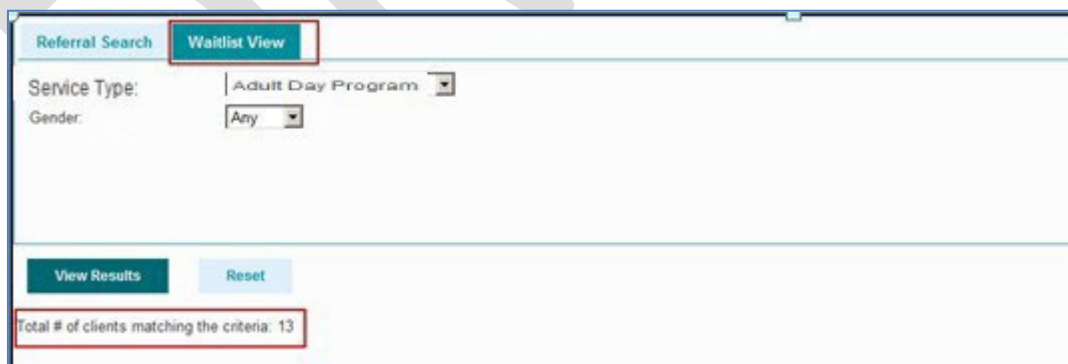


The screenshot shows the 'Referral Search' interface with the 'Waitlist View' tab selected. The 'Service Type' section has the following checked options: Adult Day Program, Home Maintenance & Repair, Supportive Housing, Transportation - Accessible, and Transportation - Disabled Parking Permit. The 'Status' section has the following checked options: Awaiting Response. Other options like Admitted, Closed, and Waitlisted are unchecked.

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



The screenshot shows the 'Referral Search' interface with the 'Waitlist View' tab selected. The 'Service Type' dropdown is set to 'Adult Day Program' and the 'Gender' dropdown is set to 'Any'. Below the filters are 'View Results' and 'Reset' buttons. A red box highlights the text 'Total # of clients matching the criteria: 13'.

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:

Referral ID	Status	Client Name	Bed Type	Priority	Notification Date	Decision Expected
102116.01.700981.1585	Waitlisted (CCAC – Client Accepts Bed Off)	Complex Care May, Colleen	Geriatric Assessment	All Others	2013-05-14 03:56:04 F	
102102.01.700981.1496	Waitlisted (CCAC – Client Accepts Bed Off)	CC R2.2, Colleen	Geriatric Assessment	All Others	2013-05-09 04:59:46 F	

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

Referrals | **Referral Details** | Referral Documents

Referral ID: [102116.01.700981.1585](#) Client: Complex Care May, Colleen (102116)

Referral Status: Waitlisted Action:

Referral Details

Organization:	BRUYERE CONTINUING CARE INC. ELISABETH BRUYERE HOSPITAL	Referral Date/Time:	14-May-2013 02:21 PM
Complex care hosp/unit:		Referring CCAC:	Champlain Community Care Access Centre
Address:	43 Bruyere St. Ottawa, Ontario K1N 5C8	CCAC Team:	North Team
Bed Type:	Geriatric Assessment	Caseload:	Poinier north
Priority:	3 - All Others	Care Coordinator:	-
Waitlist Date:	14-May-2013		
Notes:	New Referral -		

Client Information

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 LHCCSS 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 and demographics and selected information.

Health Profile – selected information taken from the Client Health Profile in CHRIS

Health Profile			
Infection Status: <input type="button" value="Clear from Infection"/>			
Diagnoses:			
Lix Code	Description	Start Date	
Uncoded	Multiple Sclerosis	08-May-2013	
Uncoded	CCPD	08 May 2013	
Surgical/Other Procedures:			
Date	Code	Description	
Allergies:			
Category	Specifics	Additional Information	Start Date
Animal	Cat dander		08 May 2013

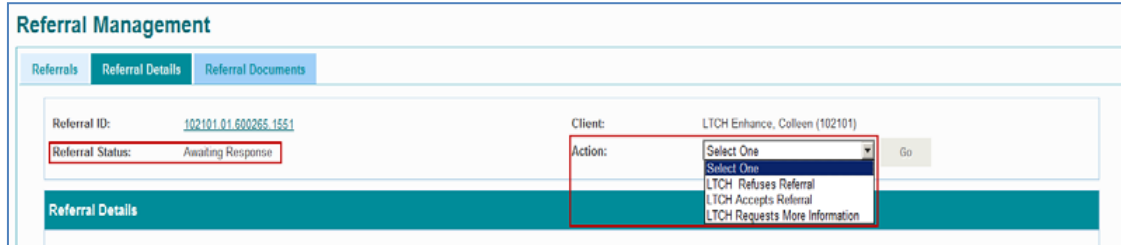
Contacts- contains Active Personal and Medical Contacts information derived from CHRIS

Contacts				
Personal Contacts:				
Name	Relationship/Role/Legal	Contact Restriction Details	Phone	Additional Information
May, Jane	Daughter / Caregiver - Informal / POA - Personal Care	Share All F/II	(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;

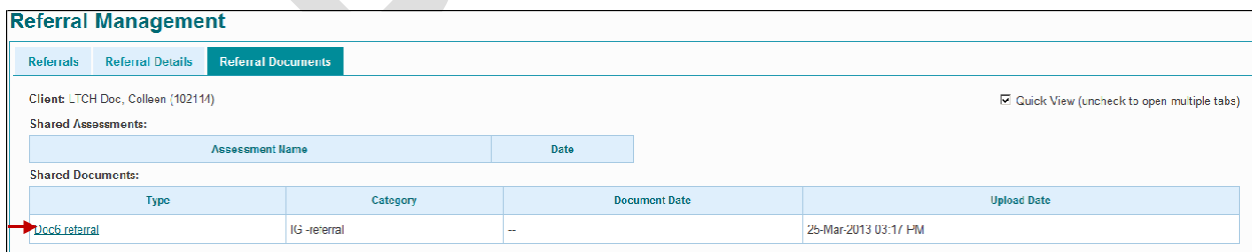


The following table displays all the possible actions for each CSSA referral status:

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

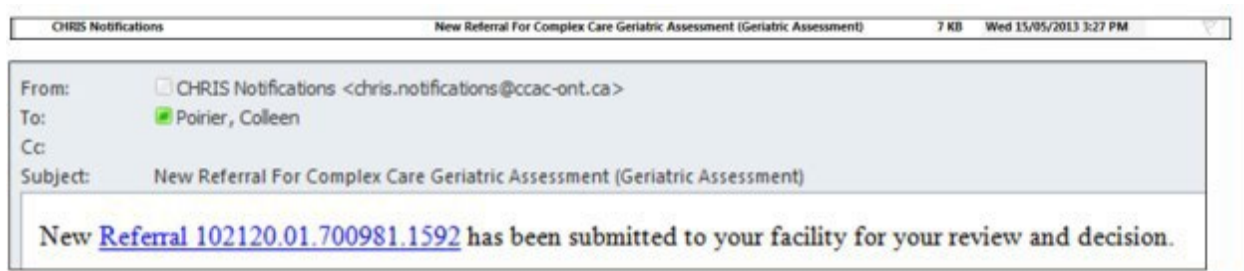
As part of the e-Referral 'Referral Package', CHRIS users have the ability to share documents from their Document Management System (DMS) library and interRAI Assessments from PointClickCare. Only those documents and assessments associated with the referral will be displayed



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