



Health Partner Gateway Reference Guide for Health Partners

MODULE 3 Offer Management

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 Wong | 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 Wong | Reference Guide divided into multiple modules focusing on different areas/functionalities. Updates to include CHRIS 2.2/ HPG 3.0 release enhancements. Module 3 – Updates to Offer Management GUI and navigation |

Table of Contents

| | | |
|---------|--|----|
| 1. | Introduction | 1 |
| 1.1 | Background & Overview | 1 |
| 1.2 | Overview of Functionality | 1 |
| 1.3 | Offer Management..... | 2 |
| 1.4 | Module 3 Layout..... | 2 |
| 2. | Offer Management | 4 |
| 2.1 | Offer Monitoring | 4 |
| 2.1.1 | Responding to an Offer | 6 |
| 2.1.1.1 | Accepting an Offer | 7 |
| 2.1.1.2 | Refusing an Offer | 7 |
| 2.1.1.3 | Delivery Failed Message | 9 |
| 2.1.2 | Automated Offer Management | 9 |
| 2.1.3 | Provider Email Notifications | 10 |
| 2.2 | Offer Query | 14 |
| 2.2.1 | Search by Service Offer ID Number | 14 |
| 2.2.2 | Search by Date Range, Status or Service Delivery Type..... | 15 |
| 2.3 | Offer Details | 16 |

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.

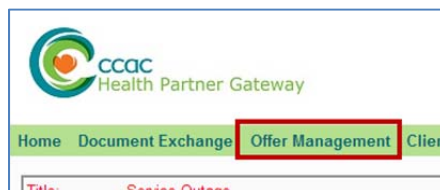
A user's account type, team membership and role assignments determine what that user is able to see and do within HPG.

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 Offer Management

The Offer Management tab 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 role of Offer Manager in order to access the Offer Monitoring and Offer Query functions in HPG.



The Offer Management area enables you to view incoming Service Offers from CHRIS, respond to those offers (accept/refuse), as well as perform a search on any past service offers in HPG that already has a response.

1.4 Module 3 Layout

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

- Section 2: Offer Management - *Offer Monitoring, Offer Query, Offer Details*

Other modules available include:

- Module 1: Introduction to HPG (*available March 2013*)
- Module 2: Document Exchange (*available March 2013*)
- Module 4: Community Health Portal (CHP) (*available March 2013*)
- Module 5: Referral Management (*available May 2013*)
- Module 6: Self-User Management (*available May 2013*)

2. OFFER MANAGEMENT

The Offer Management module allows HPG Service Provider users to view and respond to service offers sent to their organization.

HPG 3.0 included some navigation enhancements to this tab to enhance the user experience when managing service offers.

There are now three tabs within Offer Management:

- **Offer Monitoring** – displays current service offers in “Offered” state
- **Offer Query** – allows user to search for service offers
- **Offer Details** – allows user to view Service Offer details for a specific service offer and respond to the offer

2.1 Offer Monitoring

The Offer Monitoring tab is opened as default:



Offer Management

Offer Monitoring (7) Offer Query Offer Details

Open Service Offers (7)

Pause Last refresh: 13-Mar-2013 10:06 AM

| # | Offer ID | CCAC | Status | Service/Delivery | Priority Rating | Response Urgency | |
|---|-------------------------|------|---------|---|-----------------|------------------|-----|
| 1 | 1004997 | CENT | Offered | Adult Day Program - CCAC - Visit | | Regular | 18- |
| 2 | 1005023 | CENT | Offered | Adult Day Program - CCAC - Visit | | Regular | 27- |
| 3 | 1005048 | CENT | Offered | Adult Day Program - CCAC - Visit | | Regular | 07- |
| 4 | 1005134 | CENT | Offered | Outcome-Based Wound - Outcome-Based Wound - sdt | High | Urgent | 16- |

Note that the Offer Monitoring tab shows a count of outstanding offers in brackets (i.e. offers that are in “Offered” status) to assist users in monitoring any new incoming offers.

The Offer Monitoring page provides access to the list of Offers waiting for a response. The screen automatically refreshes every minute in order for the list to be constantly updated with new offers (the refresh can be paused if desired). Each column can be sorted to display the list as needed.

Offer Management

Offer Monitoring (7) Offer Query Offer Details

Open Service Offers (7)

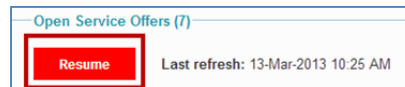
Pause Last refresh: 13-Mar-2013 10:08 AM

| # | Offer ID | CCAC | Status | Service/Delivery | Priority Rating | Response Urgency | Offer Date/Time | Expiry Date/Time |
|---|-------------------------|------|---------|---|-----------------|------------------|-------------------------|-------------------------|
| 1 | 1004997 | CENT | Offered | Adult Day Program - CCAC - Visit | | Regular | 18-Dec-2012 9:09 AM EST | 18-Dec-2012 9:10 AM EST |
| 2 | 1005023 | CENT | Offered | Adult Day Program - CCAC - Visit | | Regular | 27-Dec-2012 8:11 AM EST | 27-Dec-2012 8:12 AM EST |
| 3 | 1005048 | CENT | Offered | Adult Day Program - CCAC - Visit | | Regular | 07-Jan-2013 8:41 AM EST | 07-Jan-2013 8:42 AM EST |
| 4 | 1005134 | CENT | Offered | Outcome-Based Wound - Outcome-Based Wound - sdt | High | Urgent | 16-Jan-2013 3:00 PM EST | 16-Jan-2013 3:01 PM EST |
| 5 | 1005243 | CENT | Offered | Adult Day Program - CCAC - Visit | | Regular | 04-Feb-2013 9:09 AM EST | 04-Feb-2013 9:10 AM EST |
| 6 | 1005275 | CENT | Offered | Adult Day Program - CCAC - Visit | | Regular | 06-Feb-2013 2:27 PM EST | 06-Feb-2013 2:28 PM EST |
| 7 | 1005322 | CENT | Offered | Adult Day Program - CCAC - Visit | | Regular | 15-Feb-2013 7:50 AM EST | 15-Feb-2013 7:51 AM EST |

- At the top of the page, the number of records in the offer monitoring list is displayed:



- The Pause button puts the automatic refresh on hold. Click again to Resume:



- Date and time stamp of when the last refresh occurred

The following attributes are displayed for each offer:

Offer ID - The Offer ID number is a unique identification number assigned to every service offer sent from CHRIS to HPG. In Service Offer Monitoring, the Offer ID is a link for the provider to open the offer details.

CCAC - Displays the CCAC that sent the offer.

Status - Displays the status of the offer – in this list, all statuses will be in the 'Offered' state. (i.e. the offer has not been responded to yet)

Service/Delivery - Displays the type of Service that is being offered (e.g. Nursing) and the Delivery Type (e.g. visit home, shift home, etc).

Priority Rating - Displays the service priority – an indicator of how urgently the client requires the selected service.

Offer Date/Time - The date and time the offer was sent from CHRIS

Expiry Date/Time - The date and time an offer expires.

2.1.1 Responding to an Offer

Click on the Offer ID link to view the details of the Service Offer.



Open Service Offers (2)

Pause Last refresh: 07-Mar-2013 11:13 AM

| # | Offer ID | CCAC | Status |
|---|-------------------------|------|---------|
| 1 | 1005023 | CENT | Offered |
| 2 | 1005134 | CENT | Offered |

The Offer Details page of the offer you selected will open:



Offer Management

Offer Monitoring (2) Offer Query Offer Details

Offer Status: Offered Central Community Care Access Centre Refuse

Service Offer Accept

Response Due Date/Time: 27-Dec-2012 8:12 AM EST

| Offer Details | | | |
|-------------------------|----------------------------------|-----------------------------|-------------------------|
| Provider Name: | Baxter Order of Nurses-K | Service Offer ID: | 1005023 |
| Referral Type: | Home Care | Offer Date/Time: | 27-Dec-2012 8:11 AM EST |
| Service/Delivery Type: | Adult Day Program - CCAC - Visit | Geographic Area: | Cherry hills |
| Provider Contract Code: | ADULTPROGRAM | Local Distinction: | Adult |
| Treatment Address | Bay St Toronto Ontario M5G 2C8 | Offer Address Instructions: | |
| Location: | | Preferred Language for | |
| Cluster Care Site: | No | Service: | |
| School: | Not Applicable | Service Priority Rating: | |

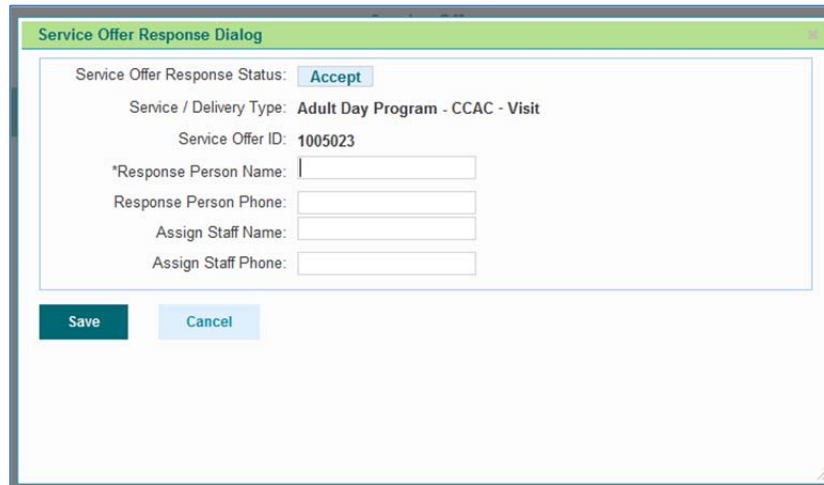
The information does not include any client identifying information.

If you do not want to provide a response to the CCAC at this time, you can select the [Offer Monitoring \(2\)](#) tab to go back to the Offer Monitoring page.

2.1.1.1 Accepting an Offer

To Accept the Offer, click on the  button at the top right of the screen.

The 'Service Offer Response Dialog' will open with a status of 'Accept':



The screenshot shows a dialog box titled "Service Offer Response Dialog". Inside, the "Service Offer Response Status" is set to "Accept". Below this, the "Service / Delivery Type" is "Adult Day Program - CCAC - Visit" and the "Service Offer ID" is "1005023". There are five input fields: "*Response Person Name", "Response Person Phone", "Assign Staff Name", and "Assign Staff Phone". At the bottom of the dialog are "Save" and "Cancel" buttons.

Complete the fields:

Response Person Name (required) – enter the name of the logged in user accepting the offer

Response Person Phone and **Ext.** (optional)

Assign Staff Name (optional) – enter the name of the assigned staff that will be providing the service to the client, if known

Assign Staff Phone (optional) – contact number for person assigned to the service

Select 

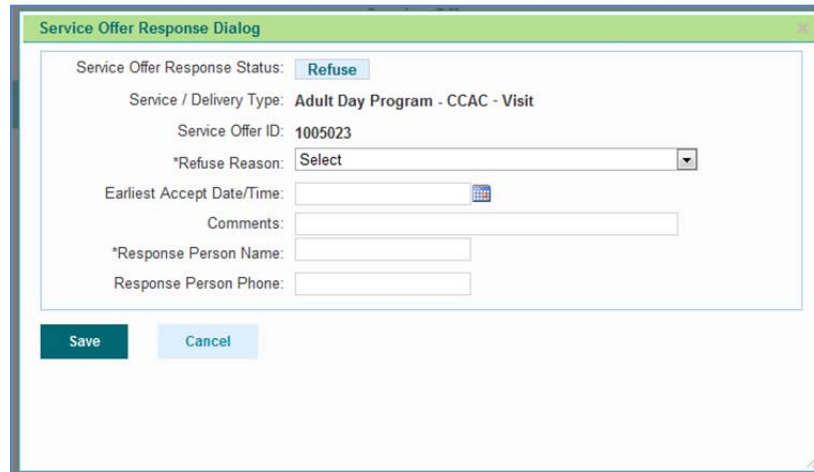
Once the offer has been accepted, CHRIS will automatically be updated and the Referral will be posted in your HPG Inbox. The Refuse and Accept buttons will grey out on the Offer Detail page and can no longer be selected.

The Offer also disappears off the list on the Service Offer Monitoring page but is still accessible via the Offer Query – refer to [Section 2.2](#).

2.1.1.2 Refusing an Offer

To Refuse the Offer, click on the button at the bottom right of the screen.

The 'Service Offer Response Dialog' will open with a status of 'Refuse':

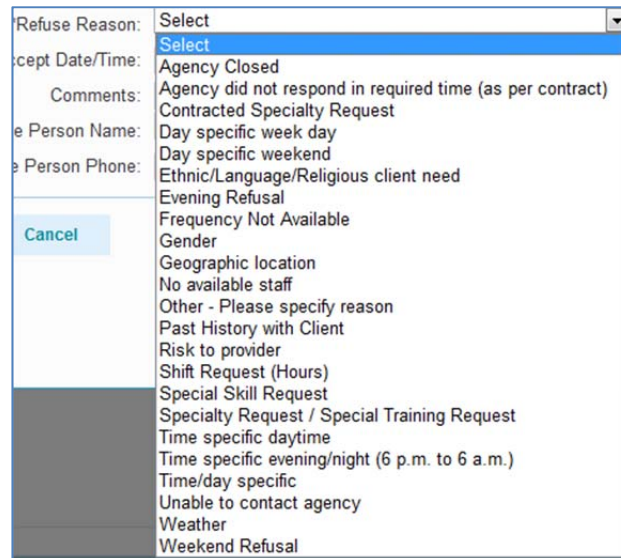


The screenshot shows a 'Service Offer Response Dialog' window. It contains the following fields and controls:

- Service Offer Response Status:** A button labeled 'Refuse'.
- Service / Delivery Type:** 'Adult Day Program - CCAC - Visit'.
- Service Offer ID:** '1005023'.
- *Refuse Reason:** A dropdown menu currently showing 'Select'.
- Earliest Accept Date/Time:** A date and time selection field with a calendar icon.
- Comments:** A text input field.
- *Response Person Name:** A text input field.
- Response Person Phone:** A text input field.
- Buttons:** 'Save' (dark green) and 'Cancel' (light blue).

Complete the fields:

Refuse Reason (required) –select a reason from the drop down list:



The screenshot shows the dropdown list for the 'Refuse Reason' field. The list includes the following options:

- Select
- Agency Closed
- Agency did not respond in required time (as per contract)
- Contracted Specialty Request
- Day specific week day
- Day specific weekend
- Ethnic/Language/Religious client need
- Evening Refusal
- Frequency Not Available
- Gender
- Geographic location
- No available staff
- Other - Please specify reason
- Past History with Client
- Risk to provider
- Shift Request (Hours)
- Special Skill Request
- Specialty Request / Special Training Request
- Time specific daytime
- Time specific evening/night (6 p.m. to 6 a.m.)
- Time/day specific
- Unable to contact agency
- Weather
- Weekend Refusal

Earliest Accept Date/Time (optional) – if unable to accept the terms of the offer, you are able to respond with the first available date and time you can provide service for the client.

Comments (optional) – Type in any additional information that is relevant to the offer refusal.

Response Person Name (required) – enter the name of the logged in user refusing the offer

Response Person Phone and Ext. (optional)

Once the offer has been refused, the client file will immediately be updated in CHRIS with the refusal. Refuse and Accept buttons will grey out on the Offer Detail page and can no longer be selected

The Offer also disappears off the list on the Service Offer Monitoring page but is still accessible via the Offer Query – refer to [Section 2.2](#).

Any changes to the status of an Offer made in CHRIS by the CCAC, (e.g. an Offer is cancelled or manually marked as accepted/refused) will be reflected in HPG Offer Query screen. Only offers that have a status of Offered will be displayed on the Service Offer Monitoring screen.

If an offer goes past the expiry time stated on the offer and the status is still 'Offered', the Offer will still remain on the Service Offer Monitoring screen and can be actioned on by you (provider). Only when CHRIS considers an offer to be expired will it appear as such in HPG. I.e. If the offer is marked by a CCAC user in CHRIS as expired (refused – agency did not respond in time) then it will no longer be available on the Service Offer Monitoring screen in HPG and the Status will change to Refused. The Accept and Refuse buttons will be disabled on the offer when pulled from the Offer Query screen.

UNLESS... the CCAC has enabled Automated Offer Management (see [Section 2.1.2](#)).

2.1.1.3 Delivery Failed Message

If you receive a delivery failed message when saving an acceptance or refusal, then the offer response failed to be delivered to CHRIS. You may attempt to resend the offer response or phone the acceptance/refusal to the CCAC at this time. The CCAC can mark an Offer in CHRIS as being accepted or refused and the status of the offer will update in HPG – it will be removed from the Offer Monitoring screen and can be accessed from the Offer Query screen.

2.1.2 Automated Offer Management

Automated Offer Management is an extension of the service offer process. The main features of Auto Offer Management include two processes:

1. Automated Offer Expiration Process

The system will automatically respond to a service offer as a refusal on behalf of the provider if they do not respond by the contracted response date/time (i.e. the

offer expires). The system has the ability to automatically calculate when an offer is to expire based on a main schedule (e.g. CCAC business hours, provider business hours) and users will have the ability to add over rides that will supersede the main schedule and prevent the system from expiring offers during the designated grace period (e.g. holidays, weekend hours, etc.)

2. Automated Service Re-Offer Process

The system will automatically detect a refusal response (via HPG, system expiration refusal, P-XML or CHRIS system) and send an offer to the next provider on the rotation list. This sending of new offers will end when a provider accepts the offer, a CCAC user cancels the offer or the last provider on the rotation list has been sent an offer and has refused.

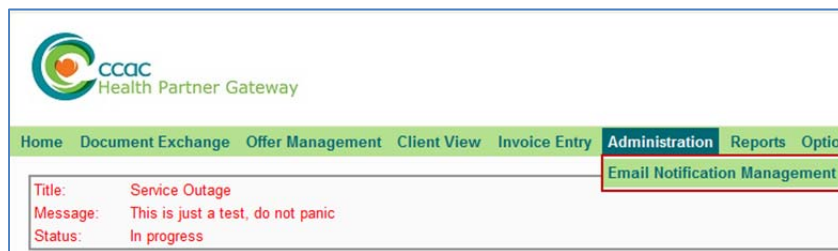
CCACs have the ability to enable or disable Auto Offer Expiration functionality.

2.1.3 Provider Email Notifications

Providers can be sent an email notification to their email inbox when a service offer has been sent to their HPG Inbox. Providers can enable this functionality by saving one or more valid provider email address(es) in the Provider HPG Administration screen.

A Provider User must be assigned 'Provider Team Administrator' role in order to set this up for their organization.

Mouse over **Administration** drop down menu and select Team Management:



The Email Notification Management page will open:



The screenshot shows the 'Email Notification Management' page. It features a search criteria section with the following fields and buttons:

- Search Criteria**
- List name:
- Team:
- Search** button
- Reset** button

Search for the team to which the email address needs to be added.

Select the Team Name from the Search Results

| Name | Team | Document Types | Email Addresses |
|---|--|--|--|
| Central CCAC - Baxter Order of Nurses-K Email Subscripton | Central CCAC: Baxter Order of Nurses-K | Unspecified Service Offer Service Referral Frequency Update E&S Order BR - PS BR - E&S ODB - Notif. PR Response Client Update Notification Client Information Outcome-Based Pathway Notification Outcome-Based - RA-PS Organization Delegation Notification | max.gromov@ccac-ont.ca elizabeth.vidal@ccac-ont.ca lilia.dobkin@ccac-ont.ca lnna.goldenberg@ccac-ont.ca snezana.lucic@ccac-ont.ca Eugene.Morozov@ccac-ont.ca QA2@test.com-ont.ca |
| Finance Department | Central CCAC: Baxter Order of Nurses-K | Service Offer BR - PS | x@x.com |

Select the Document Types you are setting up the email notifications for:

Edit Notification List

* List name:

* Team:

* Document Types:

| | | |
|--|--|--|
| <input checked="" type="checkbox"/> Unspecified | <input checked="" type="checkbox"/> BR - PS | <input checked="" type="checkbox"/> Client Information |
| <input checked="" type="checkbox"/> Service Offer | <input checked="" type="checkbox"/> BR - E&S | <input checked="" type="checkbox"/> Outcome-Based Pathway Notification |
| <input checked="" type="checkbox"/> Service Referral | <input checked="" type="checkbox"/> ODB - Notif. | <input checked="" type="checkbox"/> Outcome-Based - RA-PS |
| <input checked="" type="checkbox"/> Frequency Update | <input checked="" type="checkbox"/> PR Response | <input checked="" type="checkbox"/> Organization Delegation Notification |
| <input checked="" type="checkbox"/> E&S Order | <input checked="" type="checkbox"/> Client Update Notification | |

Add the email address(es) to where the service offer notification is/are to be sent (enter the email addresses in the box in the 'Email Address' text box and select **Add**):

* Email Addresses:

Once you have added your email address, you can either select the **Save** button to save the information or add another email address.

After the email address(es) has/have been added, CHRIS/HPG will send an email to those emails addresses when a Service Offer is sent.

When a Service Offer from CHRIS is sent, the following are received in the Provider's HPG:

1. The Service Offer in the Offer Monitoring screen for the provider to respond to:

Offer Monitoring (2) Offer Query Offer Details

Open Service Offers (2)

Pause Last refresh: 07-Mar-2013 11:33 AM

| # | Offer ID | CCAC | Status | Service/Delivery | Priority Rating | Response Urgency | Offer Date/Time | Expiry Date/Time |
|---|----------|------|---------|---|-----------------|------------------|-------------------------|-------------------------|
| 1 | 1005023 | CENT | Offered | Adult Day Program - CCAC - Visit | | Regular | 27-Dec-2012 8:11 AM EST | 27-Dec-2012 8:12 AM EST |
| 2 | 1005134 | CENT | Offered | Outcome-Based Wound - Outcome-Based Wound - sdt | High | Urgent | 16-Jan-2013 3:00 PM EST | 16-Jan-2013 3:01 PM EST |

2. The Service Offer document in the Inbox:

Inbox

Search Criteria - System Default

Search Results

Pause Last refresh: 07-Mar-2013 11:33 AM

Unprocess Download

| Document Type | Description | Tracking ID | Urgent | Status | From Team | To Team | Posted | Processed |
|---------------------|-------------------------------------|-------------|--------|--------|------------------------------|---|--------------------------|-----------|
| Service Referral | BRN_101251_Offer_ID_1005410 | c381 | | Posted | Central CCAC - CHRIS Mailbox | Central CCAC - Baxter Order of Nurses-K | 07-Mar-2013 11:22 AM EST | |
| Unspecified | Copy of Regression 2 2E4b25_02.xlsx | a627 | Yes | Posted | Central CCAC - CHRIS Mailbox | Central CCAC - Baxter Order of Nurses-K | 07-Mar-2013 11:11 AM EST | |
| Unspecified | Physio.pdf | 99ac | | Posted | Central CCAC - CHRIS Mailbox | Central CCAC - Baxter Order of Nurses-K | 07-Mar-2013 9:57 AM EST | |
| Outcome-Based Pathw | Internal_past_due_-_BRN_103289 | 976b | | Posted | Central CCAC - CHRIS Mailbox | Central CCAC - Baxter Order of Nurses-K | 07-Mar-2013 5:05 AM EST | |
| Outcome-Based Pathw | Internal_past_due_-_BRN_103289 | 1270 | | Posted | Central CCAC - CHRIS Mailbox | Central CCAC - Baxter Order of Nurses-K | 07-Mar-2013 5:05 AM EST | |
| Outcome-Based Pathw | Internal_past_due_-_BRN_100036 | 0435 | | Posted | Central CCAC - CHRIS Mailbox | Central CCAC - Baxter Order of Nurses-K | 07-Mar-2013 5:00 AM EST | |
| Outcome-Based Pathw | Internal_coming_due_-_BRN_104324 | a2v0 | | Posted | Central CCAC - CHRIS Mailbox | Central CCAC - Baxter Order of Nurses-K | 07-Mar-2013 5:00 AM EST | |
| Outcome-Based Pathw | Internal_past_due_-_BRN_100036 | 91a8 | | Posted | Central CCAC - CHRIS Mailbox | Central CCAC - Baxter Order of Nurses-K | 07-Mar-2013 4:55 AM EST | |
| Outcome-Based Pathw | Internal_coming_due_-_BRN_104491 | 5d1a | | Posted | Central CCAC - CHRIS Mailbox | Central CCAC - Baxter Order of Nurses-K | 07-Mar-2013 4:55 AM EST | |

3. The Service Offer Email Notification in the Inbox:

Inbox

Search Criteria - System Default *

Search Results

Resume Last refresh: 07-Mar-2013 02:11 PM

Unprocess Download

| Document Type | Description | Track | Urgent | Status | From Team | To Team | Posted | Process |
|----------------------------------|------------------------|-------|--------|--------|-------------|------------|------------------------|---------|
| Service Offer email notification | Urgent Offer ID:100541 | 5c8f | Yes | Posted | Central CCA | Central CC | 04-Mar-2013 4:14 PM E | |
| Service Offer | Regular Offer ID:1005 | 2116 | | Posted | Central CCA | Central CC | 25-Feb-2013 12:34 PM E | |
| Service Offer | Regular Offer ID:1005 | 29aa | | Posted | Central CCA | Central CC | 25-Feb-2013 12:34 PM E | |
| Service Offer | Regular Offer ID:1005 | ebed | | Posted | Central CCA | Central CC | 22-Feb-2013 6:06 PM E | |
| Service Offer | Regular Offer ID:1005 | b517 | | Posted | Central CCA | Central CC | 21-Feb-2013 8:26 PM E | |

The Service Offer Email Notification appears in the Provider's Inbox with a status of either Posted or Processed. The Service Offer and Service Offer Email Notification are independent of each other and may have different statuses.

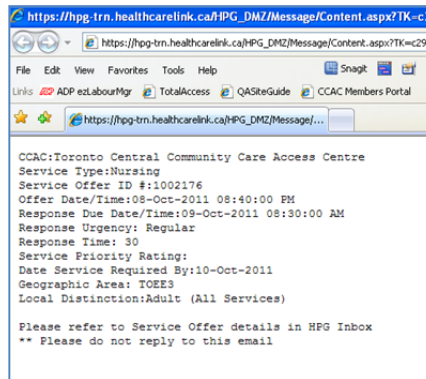
If a Service Offer Email Notification has a status of 'Processed', it means HPG has tried to send the email. The Processed date and time reflects the time the email was sent.



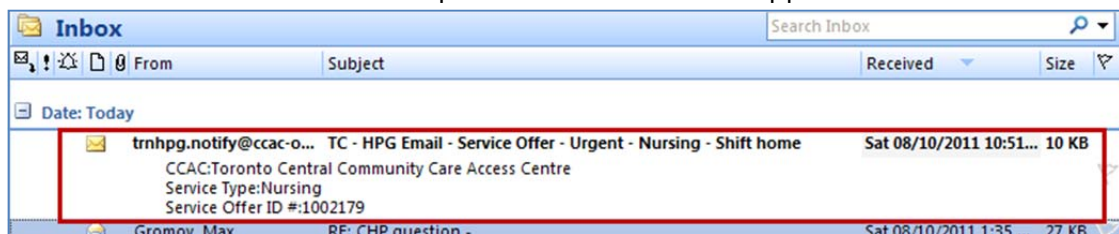
It is important to note that a status of 'Processed' in no way means the receiver of the email has read or even received the email.


If a Service Offer Email Notification has a status of Posted after 1-2 minutes, the email has failed to transmit. If the status remains Posted for an extended period of time, contact the CCAC and request an SMA to be submitted on your behalf.

If you open the Service Offer Email Notification in the Inbox, the message will display in this way:

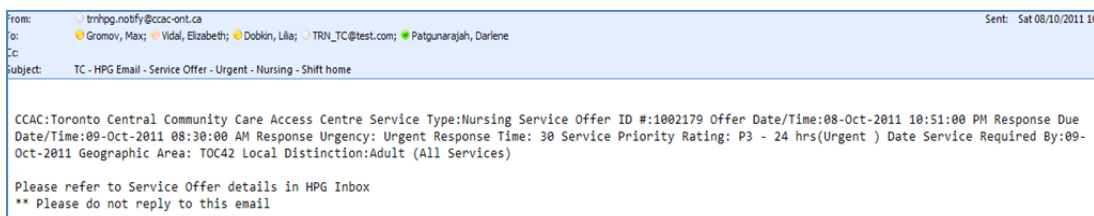


The email notification in the recipient's email inbox will appear as follows:



 It is suggested that you check your SPAM filters and your Junk Inbox to ensure that Service Offer Notifications are not being identified as SPAM.

The notification will include the following information:



The information is the same as what was received in the HPG Inbox.

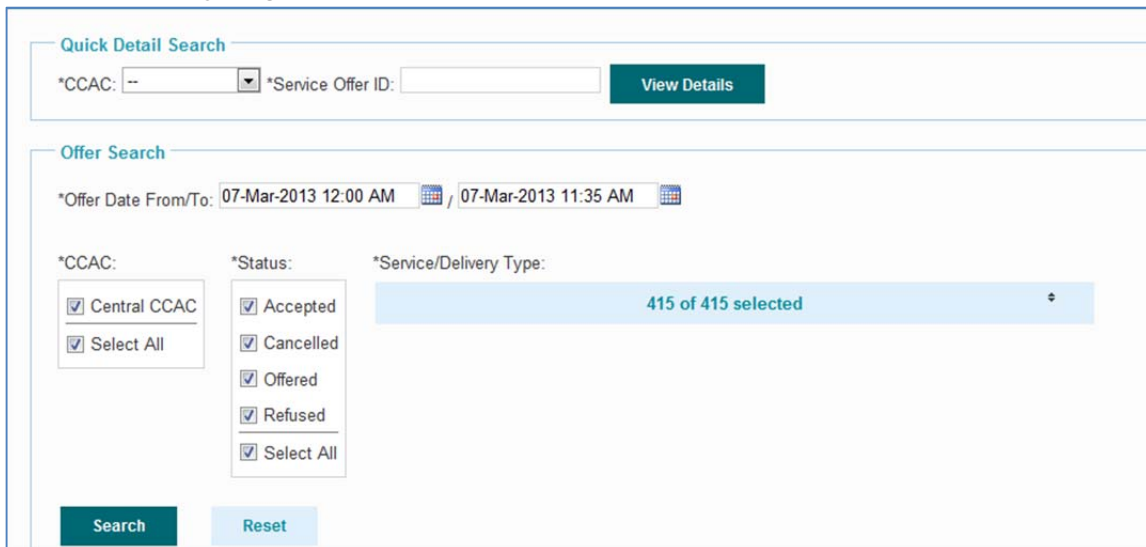
2.2 Offer Query

The Service Offer Query screen is used to view all offers, current and previous, received from any CCAC that have been sent to the associated Provider. The offer details and the status (accepted, refused, cancelled, offered) will display, however, the response details (name, comments, etc.) will not be available.

Select the **Offer Query** tab:



The Offer Query page will open:

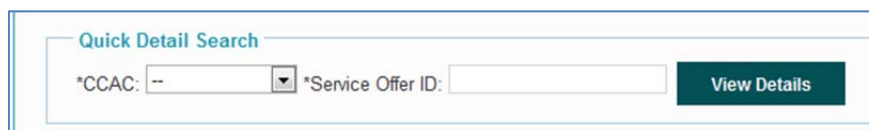


The screenshot displays the "Offer Search" section with the following elements:


- Quick Detail Search:** *CCAC: -- (dropdown), *Service Offer ID: (text input), View Details (button)
- Offer Search:**
 - *Offer Date From/To: 07-Mar-2013 12:00 AM (calendar icon) / 07-Mar-2013 11:35 AM (calendar icon)
 - *CCAC:
 - Central CCAC
 - Select All
 - *Status:
 - Accepted
 - Cancelled
 - Offered
 - Refused
 - Select All
 - *Service/Delivery Type: 415 of 415 selected (dropdown arrow)
- Search (button) and Reset (button) at the bottom.

2.2.1 Search by Service Offer ID Number

The search functionality at the top of the screen allows you to search for an offer by CCAC and by Service Offer ID. This is the easiest way to search.



This close-up shows the "Quick Detail Search" section with the *CCAC dropdown menu and the *Service Offer ID text input field, with a "View Details" button to the right.

- Select the **CCAC** that sent the offer (mandatory)
- Enter the **Service Offer ID** (mandatory)
- Select 
- The offer will open on the page (Offer Detail page)

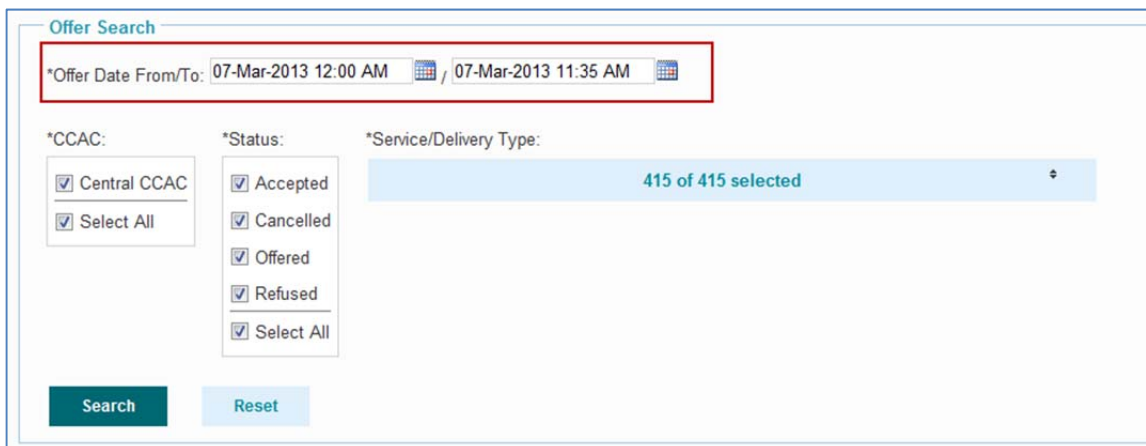
Offers with a status of 'Offered' can be responded to from this screen and will remove the offer from the Service Offer Monitoring page. Click [Go Back](#) to return to the Service Query page.

2.2.2 Search by Date Range, Status or Service Delivery Type

The search functionality on the lower half of the screen allows you to search by a Date Range, CCAC and Service Delivery Type. Determine the search criteria you wish to apply as this will determine the results to the query.

- Enter the '**From Offer Date/Time**' and '**To Offer Date/Time**' using the calendar links (optional – defaults to current date)
- Select the appropriate CCAC, Status and Service Type (mandatory). Each section has a Select All option.

- Select [Search](#)



The screenshot shows the 'Offer Search' interface. At the top, there is a date range selector: '*Offer Date From/To: 07-Mar-2013 12:00 AM / 07-Mar-2013 11:35 AM'. Below this are three sections: '*CCAC:' with 'Central CCAC' and 'Select All' options; '*Status:' with 'Accepted', 'Cancelled', 'Offered', 'Refused', and 'Select All' options; and '*Service/Delivery Type:' with a dropdown menu showing '415 of 415 selected'. At the bottom are 'Search' and 'Reset' buttons.

The search results will display at the bottom of the page - use the scroll bar to view (there is only one result in this example):

| # | Offer ID | CCAC | Status | Service/Delivery | Priority Rating | Response Urgency | Offer Date/Time | Expiry Date/Time | Response Date/Time |
|---|----------|------|----------|---|-----------------|------------------|-------------------------|-------------------------|-------------------------|
| 1 | 1005411 | CENT | Accepted | Outcome-Based Palliative - Outcome-Based Palliative | | Urgent | 07-Mar-2013 3:13 PM EST | 07-Mar-2013 3:57 PM EST | 07-Mar-2013 3:14 PM EST |

Each column is sortable by clicking on the column heading.

Click on the 'Offer ID' link to view the offer.

Offers with a status of 'Offered' can be responded to from the [Offer Details](#) screen and will remove the offer from the Service Offer Monitoring page.

2.3 Offer Details

The Offer Details screen provides the following information:

- Offer Details (no identifying client information)
- Health Information: Active Diagnosis, Client Allergies, Risk Codes, etc.

Offer Management

Offer Monitoring (6) Offer Query **Offer Details**

Offer Status: Offered Central Community Care Access Centre Refuse Accept

Service Offer
 Response Due Date/Time: 27-Dec-2012 8:12 AM EST

Offer Details

| | | | |
|------------------------------|----------------------------------|---------------------------------|-------------------------|
| Provider Name: | Baxter Order of Nurses-K | Service Offer ID: | 1005023 |
| Referral Type: | Home Care | Offer Date/Time: | 27-Dec-2012 8:11 AM EST |
| Service/Delivery Type: | Adult Day Program - CCAC - Visit | Geographic Area: | Cherry hills |
| Provider Contract Code: | ADULTPROGRAM | Local Distinction: | Adult |
| Treatment Address | Bay St Toronto Ontario M5G 2C8 | Offer Address Instructions: | |
| Location: | | Preferred Language for Service: | |
| Cluster Care Site: | No | Service Priority Rating: | |
| School: | Not Applicable | Response Time for Referral: | 0 |
| Service Response Time: | Regular | Additional Information: | |
| Provider Notification Notes: | | | |
| Focus of Intervention: | | | |
| Service Plan Goals: | | | |
| Treatment Orders: | | | |
| Provider Instructions: | 104697 | | |

Active Diagnoses

| Code | Description | Date | Additional Information |
|------|---------------------------------|-------------|------------------------|
| 0011 | CHOLERA D/T VIBRIO CHOL. EL TOR | 27-Dec-2012 | |

Client Allergies

| Category | Specifics | Start Date | Additional Information |
|----------|-----------|------------|------------------------|
| | | | |

Client Risk Codes

| Code | Description |
|------|-------------|
| | |

Client Safety Issues

| Issue | Start Date | Additional Information |
|-------|------------|------------------------|
| | | |

Service Pathways

| Pathway Name | URL |
|--------------|-----|
| | |

Outcome-Based Pathways

| Title | Additional Information | Client Assignment Start Date | Document Url |
|-------|------------------------|------------------------------|--------------|
| | | | |

Active Diagnoses

| Code | Description | Date | Additional Information |
|------|---------------------------------|-------------|------------------------|
| 0011 | CHOLERA D/T VIBRIO CHOL. EL TOR | 27-Dec-2012 | |

Client Allergies

| Category | Specifics | Start Date | Additional Information |
|----------|-----------|------------|------------------------|
| | | | |

Client Risk Codes

| Code | Description |
|------|-------------|
| | |

Client Safety Issues

| Issue | Start Date | Additional Information |
|-------|------------|------------------------|
| | | |

Service Pathways

| Pathway Name | URL |
|--------------|-----|
| | |

Outcome-Based Pathways

| Title | Additional Information | Client Assignment Start Date | Document Url |
|-------|------------------------|------------------------------|--------------|
| | | | |