Health Partner Gateway Reference Guide for Health Partners

Introduction and Common Functions

June 22, 2022

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Introduction & Background

The Health Partner Gateway (HPG) provides a single solution to securely exchange health information between a Home and Community Care Support Service (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 deployed with CHRIS and serves as the Health Partner interface for Service Offers, Orders, Billing/Invoicing, Document Sharing, eReferral and Equipment and Supplies orders. Since the application was made available in 2007, it has evolved into a robust, integrated application that enables HCCSS and Health Partners to communicate and share information in ways that go far beyond the initial applications.

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.

HPG is one application where 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

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 HCCSS

- A single user can belong to many teams

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

- A user can either be a person or a system (such as CHRIS)

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

- Only users set up as HCCSS users can be members of HCCSS (internal) Teams

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- Only users that are set up as Health Partner users can be members of Health Partner Organization (external) Teams
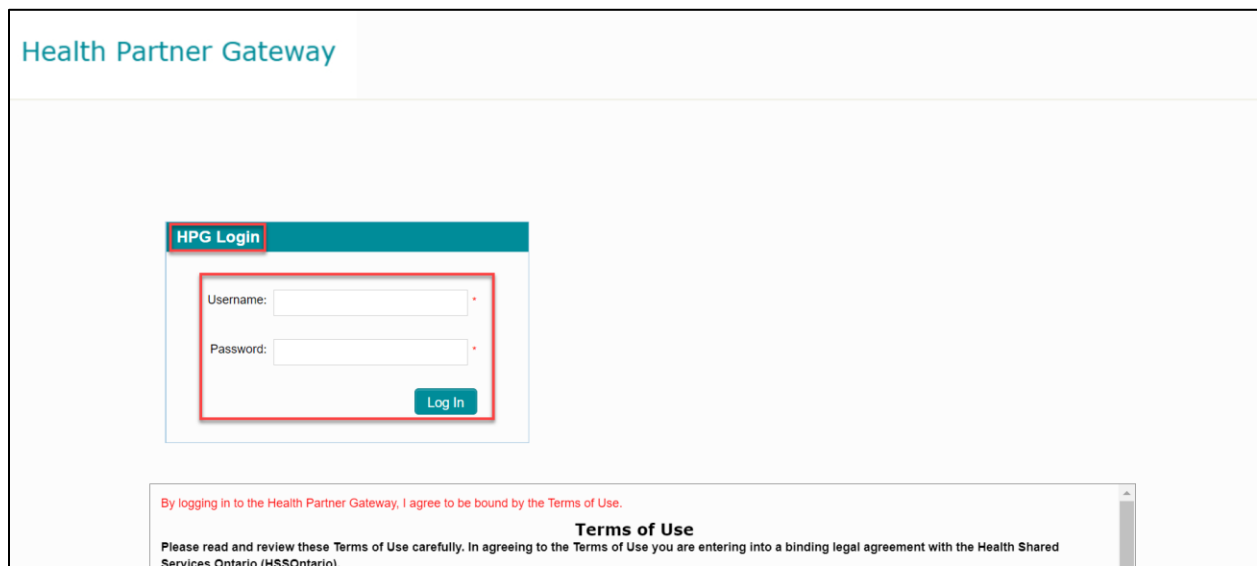
This reference guide will outline the functionalities within HPG for the **External HPG User** – i.e., health partner users (providers, vendors, pharmacies, LTCHs, etc.) that access HPG from outside the HCCSS network.

Accessing HPG

Login
Click on the HPG shortcut on your desktop (if it has been set up) or enter the URL address in your current Microsoft Edge (Chromium) or Google Chrome internet browser (link via public web):

https://hpg-chris.apps.ccac-ont.ca

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

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

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

  - *English upper-case characters (A - Z)*
  - *English lower-case characters (a - z)*
  - *Single digit numbers including zero (0 - 9)*
  - *Non-alphanumeric characters, e.g., !, $, &, @, * (Avoid _ or -)*

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:
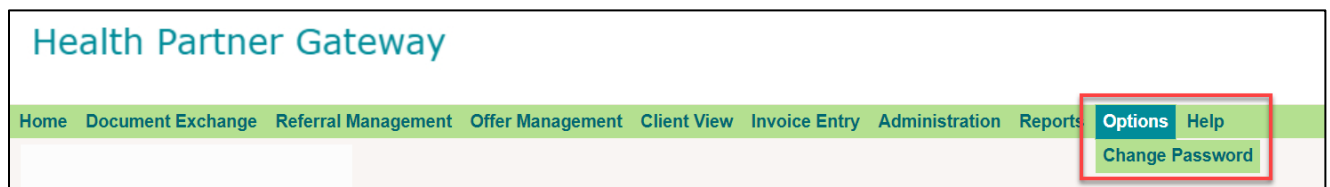
Complete the Change Password fields:

Ensure that the new password follows the above password rules.

Note that there is a Password History Policy force.

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 automatically unlock itself and try again or

- Contact your HCCSS Help Desk to have your HPG account manually unlocked. You must contact the HCCSS that originally set up your HPG user account.

If your Health Organization implements the 'Self User Management' functionality, your organization will have administrative rights to its own user accounts and be able to unlock your account

Account Automatic Unlock Policy

The HPG system automatically unlocks accounts that have been locked for 20 minutes and have had no login attempts during this period.

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This policy applies to all Health Partner users (external) including administrator type users.

The audit log message that will display is: User <username of user who is unlocked> was un-locked automatically by System.

Password Expiration Policy
The system enforces a password expiration policy. This means HPG monitors all Health Partner accounts and de-activates all accounts with password age greater 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. This activity should also log an action type of "Disable" in the Audit log table.

Password History Policy
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 Policy
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.

The audit log message that will display is: User <username of disabled user> disabled by System due to inactivity of the account.

This policy applies to all Health Partner users, including administrator type users.

Home

The home page screen is the initial screen displayed once you login to HPG. It displays the Terms of Use information to all users before they navigate to another screen. 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.

It is worth noting that since external HPG users do not require any specific software to be installed (i.e., accessible via the internet with secure, authenticated login and password), it is important that health partners have policies instituted to ensure that HPG is accessed by the appropriate people within the appropriate environments.

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1. Above the Terms of Use (in the red text), a message box displays when the Enterprise Service Desk (ESD) broadcasts a system advisory when applicable. The message box contains a Title field, a Message field and Status field. The system advisory is managed only by the ESD.

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

3. 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.

If there is 20 minutes of inactivity, the session will time out automatically, and you will need to log in again.

Teams

HPG communication between health partners and HCCSS occurs between **Teams** as opposed to users (i.e., nothing is sent to a specific person). A user's access to the team information is controlled by team membership, i.e., users can only access information from the team(s) they are a member of. Each team is owned by a single HCCSS.

Each Health Partner organization is automatically assigned one team per HCCSS branch they service. If additional teams need to be created for an organization (for example, to designate a north office and south office), discuss with the HCCSS you are servicing. Each HPG User at a health partner organization can be associated with one or more teams.

Each HPG user can only have one HPG account (one login username) regardless of how many teams he/she is a member of. It is the addition or removal of team associations that will determine his/her access to client information.

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Role Assignments

It is the Roles you are assigned during the account set up that defines what functionality you will have in HPG. Multiple roles can be assigned to you, depending on your role at the organization. Refer to the role definitions below:

Role	Permissions
Document Sender	HPG User can view the list of documents received and sent in the HPG Inbox and Sentbox. They can send documents but cannot open or save documents received in the HPG Inbox.
Document Receiver	HPG User can view the list of documents received and sent in the HPG Inbox and Sentbox for the Teams they are associated with. They can open and save documents received in the HPG Inbox.
Document Viewer	HPG User can view the list of documents received and sent in the HPG Inbox and Sentbox for the Teams they are associated with. They cannot open or save documents.
Offer Manager	HPG User can access the Offer Management Tab in HPG where they will be able to search, monitor, accept, and refuse service offers.
Client Viewer	HPG User can search for a client and view client information in the Client Health Portal.
Manual Invoice Subscriber	HPG User can search for and enter manual service, purchase, and rental invoices.
Provider Team Administrator	HPG User can update the Team email list for offer notifications.
Referral Manager	Hospital User in a Complex Care facility who can access the Referral Management module in HPG.
HCCSS(LHIN) Based Administrator	Manages HCCSS user accounts for their HCCSS. Also manages Health Partner user accounts for Health Partner Organizations that do not manage their own accounts.

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HSSOntario Administrator (Ontario Health)	Manages all user accounts in the system.
Health Partner Administrator	Manages user accounts for the user accounts for their Provincial Health Partner Organizations.
Health Partner Support Administrator	Performs limited administration activities for user accounts belonging to their Provincial Health Partner organization.

The role(s) you are assigned will determine which tabs (drop-down menus) in HPG will be available to you. If you have not been assigned a particular role, that option will not be visible at all on your menu selection.

System Access Authorization Forms

There are two main forms to complete when setting up HPG user accounts. These forms need to be completed, authorized, and sent to the HCCSS to administer and maintain the user accounts. These forms are located on the HCCSS public website:

http://healthcareathome.ca/serviceproviders/en/Health-Partner-Gateway

1. **Multiple User Account Set Up Form**

The Multiple User Set-Up Form is most frequently used when an organization is initially registering users in HPG:

> Multiple User Account Set-Up Form - used when an organization is initally registering users in HPG.

2. **Health Partner Gateway System Access Authorization Form**

This form is used when either adding or removing individual users from HPG or an update needs to be made to an existing user's account (e.g., name change or a change in role assignments, etc.).

> Health Partner Gateway System Access Authorization Form (PDF) - used when either adding or removing individual users from Health Partner Gateway or an update needs to be made to an existing user's account (e.g. name change, change in role assignments, etc.)

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Administration

Email Notification Management

The Administration tab in external HPG is accessible by those users who have been assigned the Provider Team Administrator role (assuming that their organization is still under administrative management by the HCCSS – not a delegated Health Partner organization for Self-User Management).
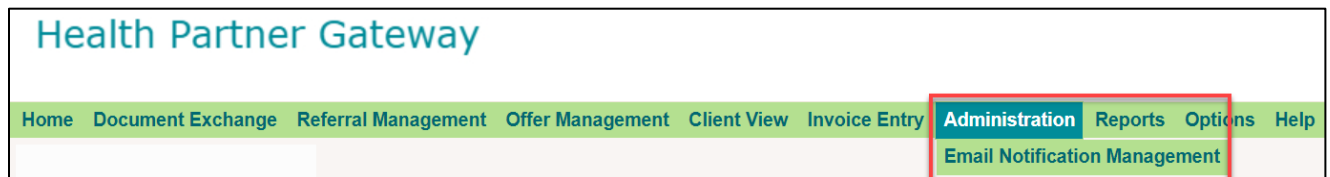
This tab allows users that have been assigned this role to send notifications to individuals via email to let them know that a particular document type/notification has been posted to HPG (previously, this had been limited to Service Offers only). This page will display all email lists for teams that their user account has been assigned to.
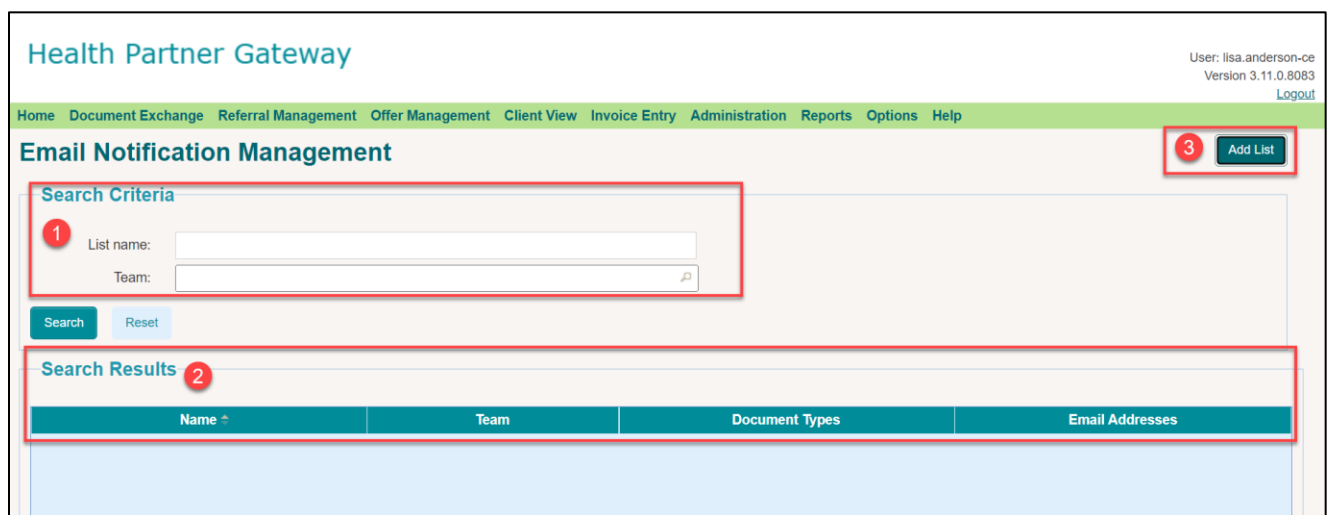
The Email Notification Management page displays:

1. **Search Criteria:** allows user to filter by List Name and Team

2. **Search Results:** use the scroll bar to view the entire list (if needed); results are displayed including the list Name, Team, Document Types (list of document types selected for the email notification) and Email Addresses (list of email addresses the email notifications are sent to)

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3. **Add List button:** will display the Add Notification List Pop-Up screen:

Complete the fields:

List Name: mandatory field; create a name for this email list (max 100 characters)

- To search for the Email Notification list you just created, use the Search Criteria
- You can click on the List Name to modify/edit the list (i.e., change the list name, team, document types and/or email recipients). The **Edit Notification List** window will open
- To delete the Email Notification List, click the **Delete** button

Team: mandatory field; specify the Team associated with the email notifications (you are able to choose from Teams that your user account has been assigned to)

Document Types: displays the document types that can be selected for the email notification – see table below for descriptions

Email Address: enter the recipient email address to receive the notification
- Click the **Add** button to add the email address. To add more email recipients, add another email address and click Add again. The list of recipients will display:

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* To remove email recipients, click the 'x' beside the email address. Once you've added all the email recipient addresses, click Save at the bottom of the pop-up screen.

Document Types

Document Type	Description
Unspecified	Any document type that is sent by a HCCSS that is not generated in or sent out of CHRIS
Service Offer	Contains the same client information as the offer in the Offer Management tab
Service Referral	Contains client information details needed by a Provider to deliver service
Frequency Update	Notifies provider of an update has been made to client's service frequencies
E&S Order	Equipment and Supply Order received by vendor org
BR-PS	Billing Reconciliation – Purchased Services; intended for finance staff at provider org
BR-E&S	Billing Report – Equipment & Supplies; intended for finance staff and vendor org
ODB Notification	Ontario Drug Benefit Notification (may be a new, renew or remove notification type)
PR Response	Provider Report Response
Client Update Notification	Contains updates from the HCCSS re: a particular client. It may be a Provider Notification (a message that can be sent from CHRIS to all providers of a specific client) or it may be a Referral Package details (sent with the Service Referral)

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Client Information	External Communication Package – PDF document containing client documents and/or notes
Outcome-Based Pathway Notification	Notification for when interval is coming due or when interval is past due
Outcome-Based – RA-PS	Reconciliation Report for Outcome-Based Purchased Services
Organization Delegation Notification	Notification for when a Health Partner Org is delegated to manage own administrative functions
Rate Adjustment – Purchased Services	If HCCSS has negotiated a rate change with the Vendor/Provider that is effective in the past, the Rate Adjustment Feature in the Utilities area of CHRIS Finance is used
Primary Care Patient Activity Report	Summary report generated for and sent to a selected Primary Care Group based on a selected list of events (i.e., Admission to HCCSS, Client on Hold, etc.) occurring from a specific start date

Reports

Audit Log
The Audit Log report allows you to view a report of all your user actions that are audited. You are only able to view your own activities (those with administrator roles are able to audit activities of users on their team).

Audit log records are viewable for a maximum of 3 years in the past from the current date. Content of the audit log table is monitored on a weekly basis and records older than 3 years are archived.

The report is accessible from the Reports drop-down menu on the Audit Log page:
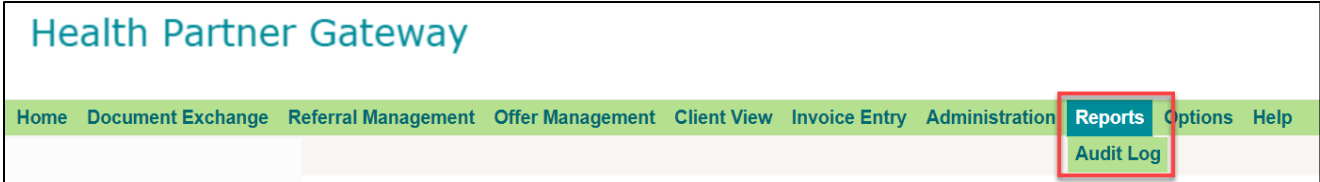
Generate a report by using the Search Criteria on the Audit Log Report page:

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Organization field will be pre-populated with your managing HCCSS (i.e., the HCCSS that owns your user account).

Username field is pre-populated with your username.

Start Date and **End Date** of the report results (date range) can be specified:

- The date corresponds to when the Action took place
- Default for the Start Date is 12:00AM of the current date
- Default for the End Date is the current date and time

The date range cannot be more than 31 days.

Action options list allows you to select one or more actions to report on (use the scroll bar to see all the available Action options). You can select one or multiple actions, or select All actions:

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Filter field allows you to search for a specific action by typing in letters or sets of letters contained in the Action name.

Show Report button to generate the report. The audit report will return a maximum of 10,000 records (regardless of the date range) – if the results are greater than 10,000, it will indicate that not all records were retrieved.

An Audit Log Report example:

1. The top of the report displays the Search Criteria selected to generate the report
2. The Organization name is displayed at top left of report
3. The total number of records in the grouping is displayed at the top right of report

The following information is displayed in the report:

Time: displays the date and time the action took place
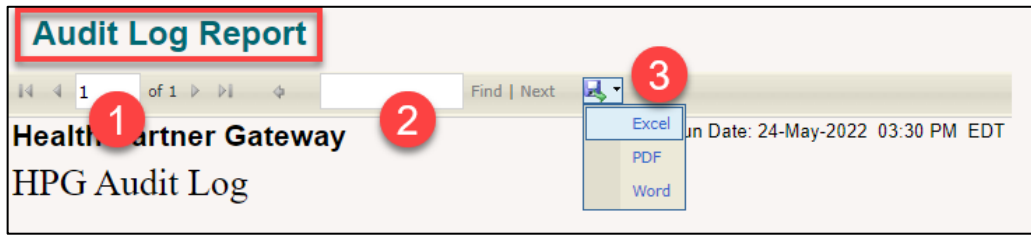
Action: displays the action that occurred

Username: displays the username of the user who performed the action (it will always be your own)

Description: displays a description of the action

Audit Log Tools
The Audit Log tools found at the very top of the report, right under the HPG menu tabs are similar to the report tools found in CHRIS and function the same way:

Audit Log Report

◄◄ ◄ 1 of 1 ► ►► ◄►		Find | Next	🖫 ▼	③	

Health Partner Gateway | Excel | un Date: 24-May-2022 03:30 PM EDT
HPG Audit Log | PDF |
| Word |

1. Page scroll – either enter the page number you want to view (if there is more than one page) or use the forward and back arrows to scroll through the pages.

2. Use this field to search for a specific word/name in the report. Enter the word and click Find. Click Next to find the next instance of the word.

3. Export icon allows you to export the report to an Excel, PDF, or Word file.

Action Descriptions

For reference, this table lists all the audit log actions and their descriptions:

Action	Description
Archive	HPG Message Archiving Job started
CHRIS_Client_Search	User performs search for CHRIS client
CHRIS_Document_Download	Download a Shared Document (DMS)
CHRIS_Assessment_Download	User access and assessment report in CHP Shared Documents
Create	User creates a new user account upon saving the account details OR user has been added to a team OR user assigned a role
Delegate	A local organization is delegated to a provincial organization OR a local organization is un-delegated from a provincial organization (part of Self-User Management feature)
Delete	User's account unassigned role or unassigned from Teams or account removed
Disable	User's account disabled by administrator due to account inactivity – set to 'Inactive'
Edit	User account updated or unlocked, or password reset

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Enable	Setting a user account's status from Inactive to Active
Lock	User has locked themselves out of their account due to 3 failed login attempts
Login	User login to HPG
Login_Failure	User fails to login to HPG
Logout	User logout
Post	Document posted to the HPG Inbox
Process	Document processed in HPG Inbox (document was downloaded) or Fax delivery
Recall	Recall a posted document
Session_Timeout	Session timed out for user
View_CHRIS_Client_Details	User clicks a client name from the CHP client search results viewing client details
OneID_SSO_Login	User logs in to HPG via ONE ID SSO
OneID_SSO_Login_Failure	User login failure via ONE ID SSO
Microsoft_SSO_Login	User logs in to HPG via Microsoft SSO
Microsoft_SSO_Login_Failure	User login failure via Microsoft SSO
HCCSS Active Directory Login	User logs in to HPG via HCCSS active directory SSO
HCCSS Active Directory Login Failure	HCCSS active directory SSO login failure

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Help

The Help option in the Main Menu is a link that will open a new window containing HPG resources for Service Providers and other Health Partners:
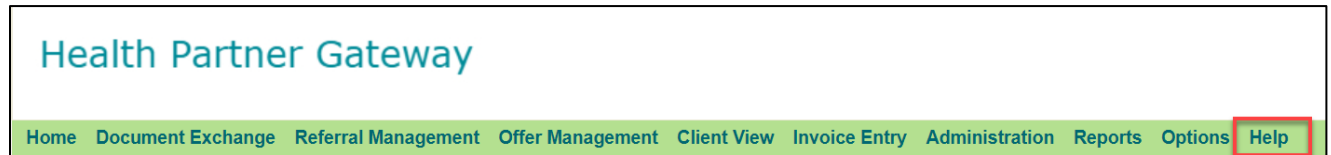
Clicking on Help will navigate you to the HPG page for Service Providers on the HCCSS public website:

Health Partner Gateway (healthcareathome.ca)

*The term LHIN and HCCSS are interchangeable for this training