Health Partner Gateway Reference Guide for Health Partners

Document Exchange

April 14, 2023

CONTENTS

Introduction & Background

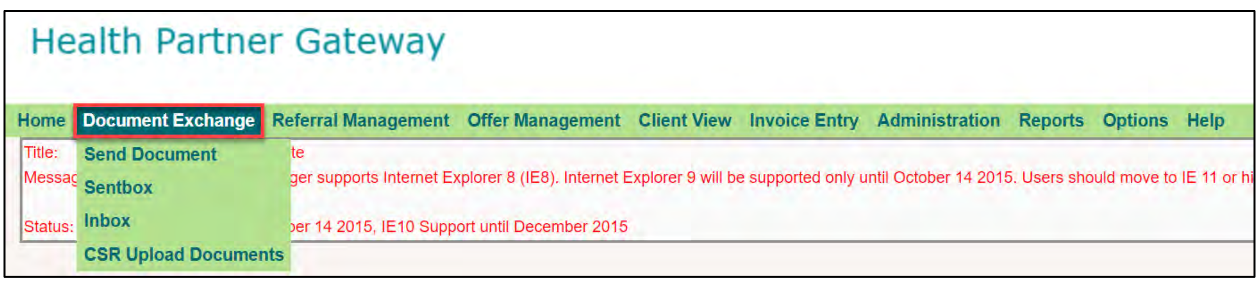
Please refer to the Health Partner Gateway Reference Guide for Health Partners Introduction and Common Functions for an overview of HPG.

This document is intended for **HPG Health Partners** that have been assigned roles providing them access to the **Document Exchange** area of HPG. This document will address the following areas in HPG:

- Document Status – Posted and Processed Documents
- Send Document
- Sentbox
- Inbox
- CSR Upload Documents

Document Exchange

The Document Exchange area of HPG enables you to view incoming notifications and documents from CHRIS, send and/or upload documents to CHRIS (to document management system) as well as monitor the status of sent, uploaded, and received documents.

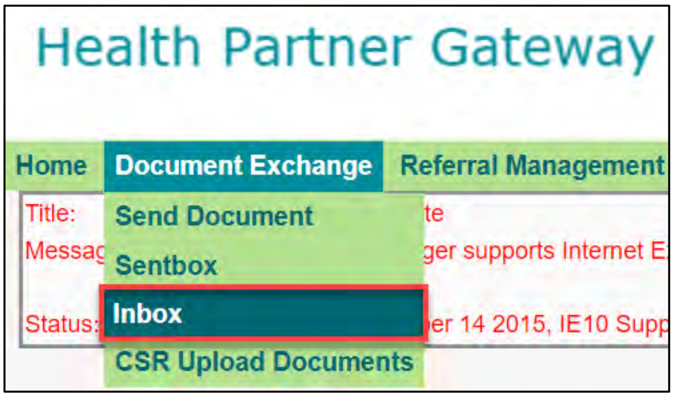


Document Exchange is accessible by Health Partner users that have been assigned the following roles in HPG:

- Document Viewer
- Document Sender
- Document Receiver

Inbox

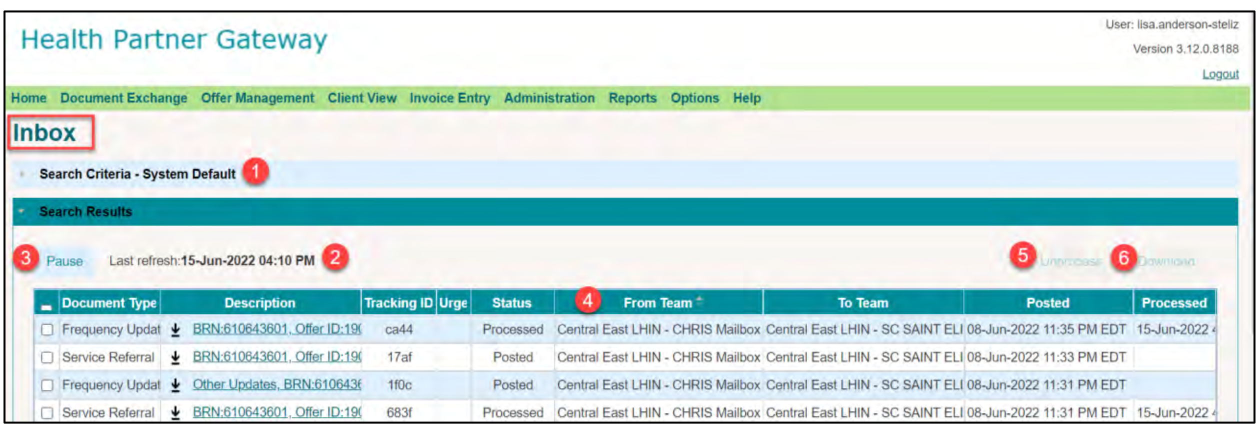
This page is accessible by HPG users with Document Receiver, Document Viewer and Document Sender role.



The Inbox displays a log of the documents/notifications that are received by a particular HPG Team. The logged in user must be a member of the receiving HPG team to view these documents/notifications.

The types of documents that are received and displayed in the Inbox varies based on the logged in user's role and the team that user is associated with.

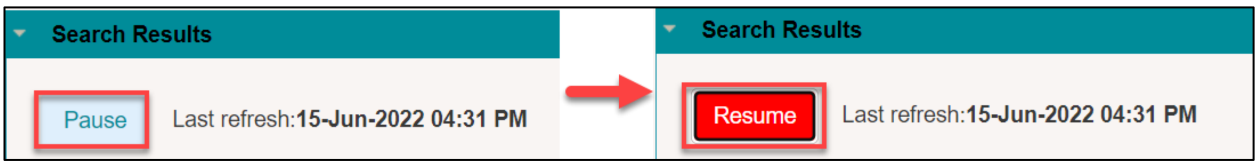
The default view of the Inbox page:



1. **Search Criteria:** expands to provide filters/tools to narrow search results list

2. **Last refresh:** displays the date/time the Inbox was last refreshed (auto-refresh occurs every 60 seconds)

3. **Pause** button: disables the HPG Inbox auto-refresh; when auto-refresh is turned off (Pause is on), the sort will remain intact; when auto refresh is turned on (Pause is off), the sort will return to the default sort; click Resume to turn off the Pause



4. **Search Results** list: displays the list of search results based on the current search criteria (default)

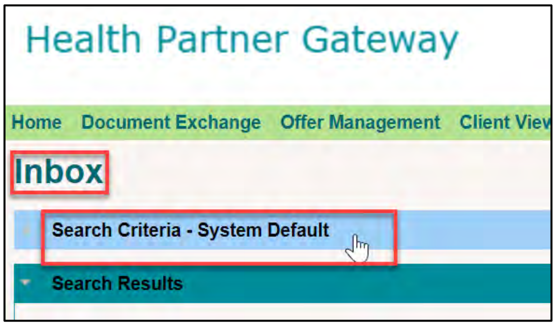
5. **Unprocess**: If a message is **Processed**, it sets the selected message status back to **Posted**. Processed Date is set back to empty. This button is only available to users with the 'Document Receiver' role.

6. **Download**: disabled if no document selected from the Inbox; available to users with the **Document Receiver** role; allows user to download one or multiple (max 10) documents; when multiple documents are selected, all the files are saved in a zip file. Unspecified documents cannot be downloaded along with other document types. (Single document downloads can be done by clicking on the download icon beside the Description link – see #4 above).

Search Criteria

The Search Criteria tool allows you to apply search filters to find a specific document/notification or group of documents/notifications. Search Criteria is available in both the Inbox and Sentbox. Use the Search Criteria to perform ad hoc searches.

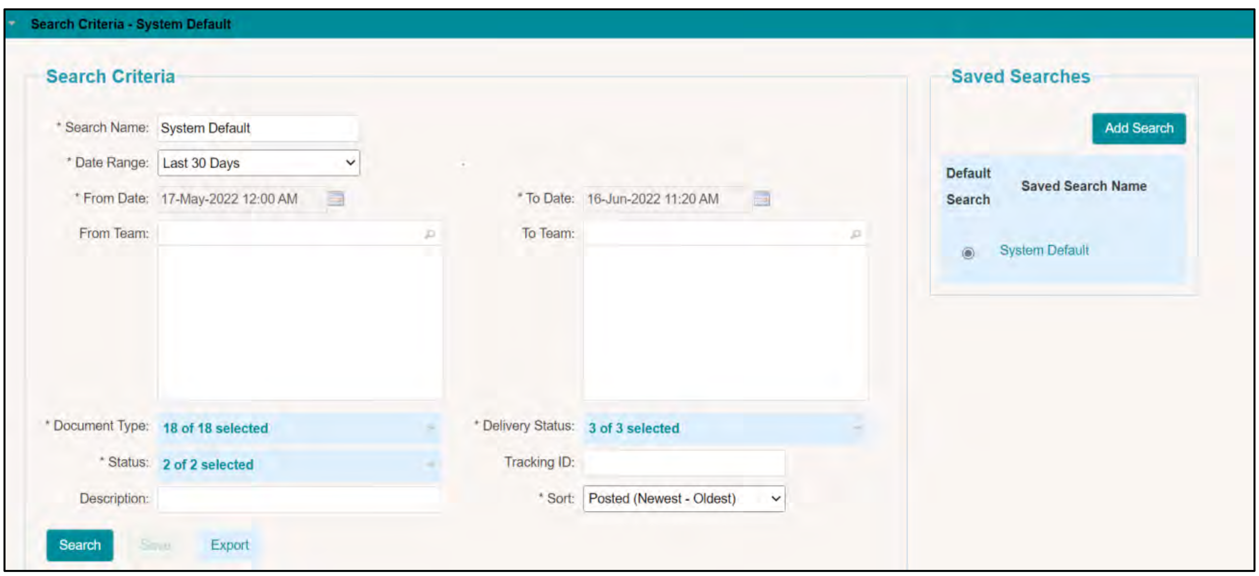
To open the Search Criteria tool, expand the Search Criteria bar by clicking on it:



Note that ‘Search Criteria’ is hyphenated with ‘System Default’. This indicates that the current search criteria settings are set to the system default.

System Default Search Criteria

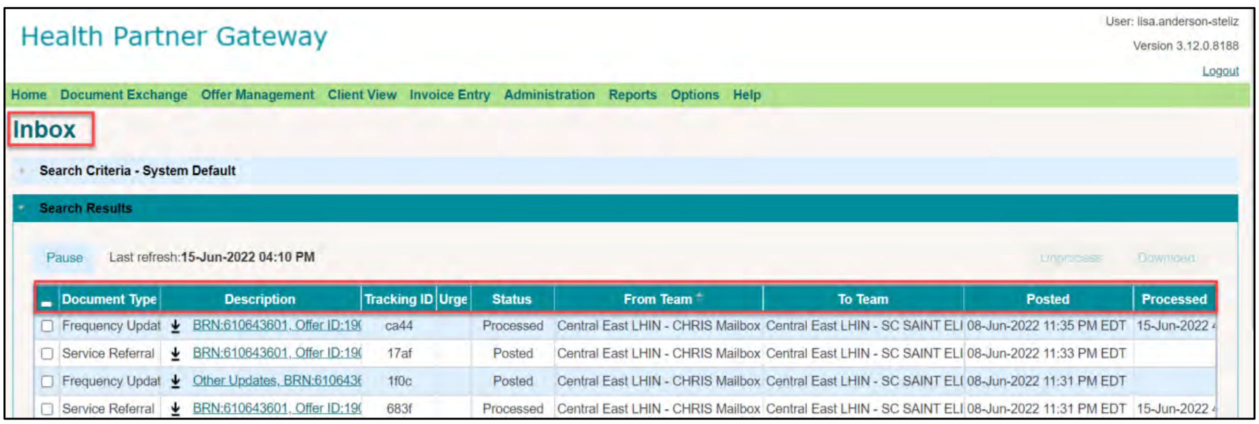
The **System Default** search criteria filters are set up as follows:



- **Date Range**: Last 30 Days
- **From Date**: Current Date and Time minus 30 days (Time 12:00AM)
- **To Date**: Current Date and Time
- No filter on **From Team** or **To Team**
- **Document Type**: ‘All’
- **Delivery Status**: ‘All’

- **Status**: ‘All’
- **Tracking ID** – empty
- **Description** - empty
- **Sort**: Posted (Newest to Oldest)

The Search Results list below the Search Criteria is based on the filters set above:



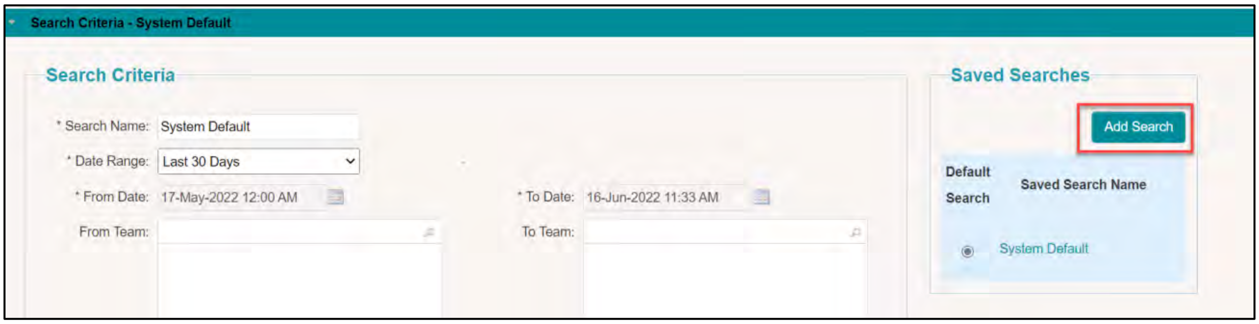
Saved Searches

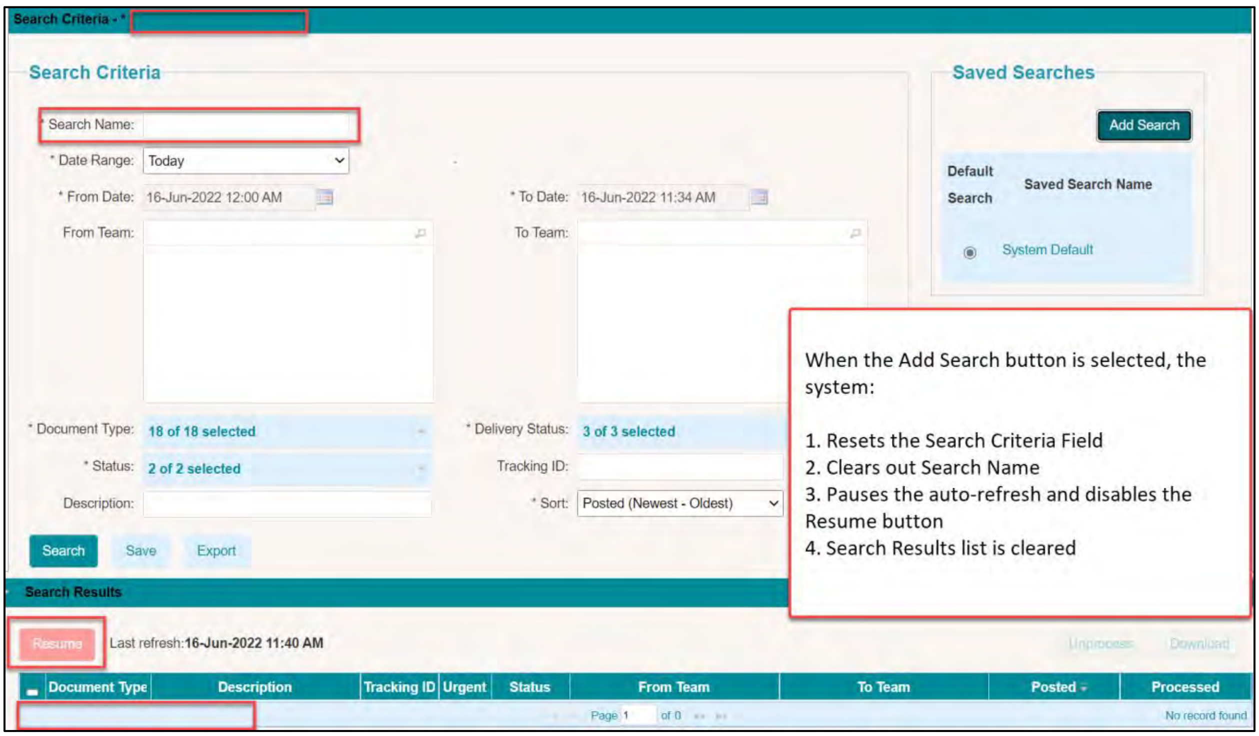
Each user who has access to the HPG **Inbox** has the ability to customize and save up to 5 sets of search criteria that can be used as desired. These 5 Saved Searches are in addition to the system default search.

Users can indicate which of their Saved Searches or System Default Search they want to use as their default search criteria when they access the HPG Inbox. For all users, the system default search shall be their default search until they specify otherwise.

To create a new Saved Search:

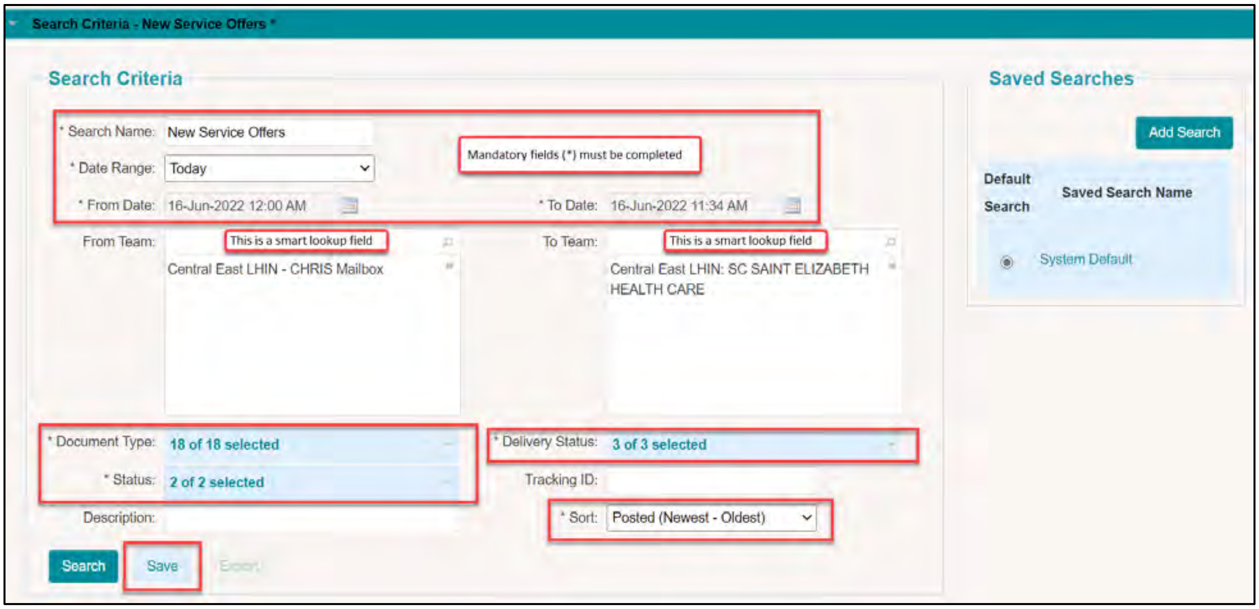
1. Click on the ‘**Add Search**’ button found in the Saved Searches box:



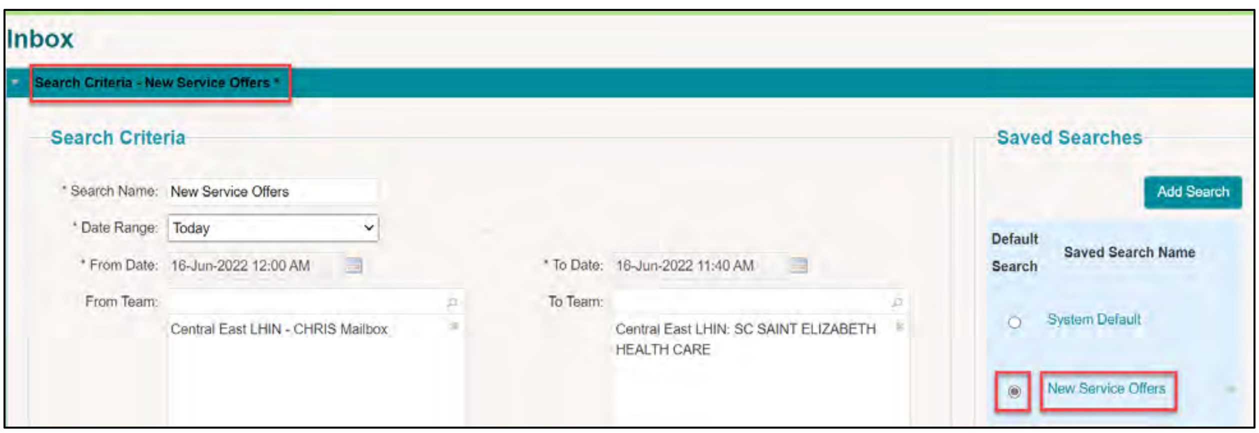


2. Complete the Search Criteria fields/filters – the ‘*’ indicates mandatory fields

This is an example:



3. Click '**Save**' and the new Search Criteria can be found in the Saved Searches list



To make the newly created Search Criteria your default search criteria, select the radio button beside it:

- The Search Criteria name will appear at the top of the page to indicate that is the Search Criteria being used
- You can repeat the process up until you have 5 custom Saved Searches (not including the

System Default)

- To execute a Saved Search, just click on the Saved Search Name and the Search Criteria will populate

To modify an existing Saved Search:

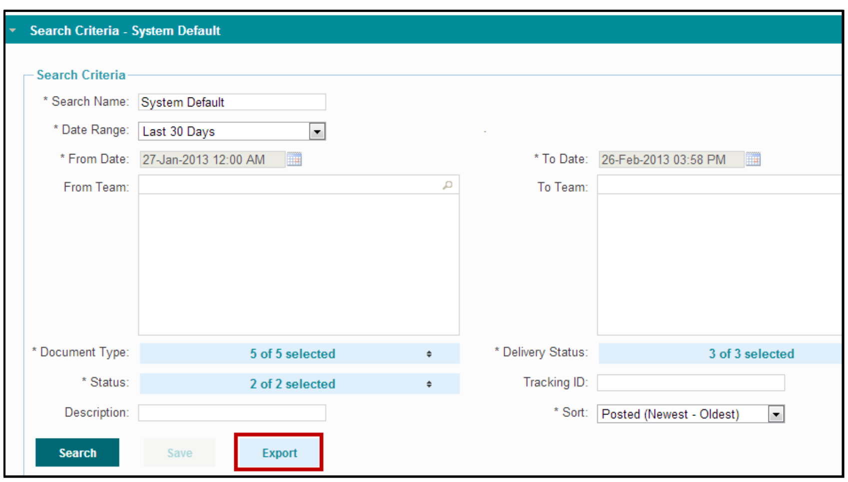
- Click on the Saved Search Name
- Modify the fields and filters you need to change and click Save

To remove/delete a Saved Search:

- Click the ‘x’ button beside the Saved Search Name and remove it

Export Search Results

The Export button in the Search Criteria allows search results to be exported to an Excel file. This button is available to users with the Document Receiver, Document Sender, or Document Viewer roles.



When you click the Export button, you will be prompted to ‘Open’ or ‘Save’ the Excel spreadsheet.

Search Results

The search results display results based on the Search Criteria filters selected:

Search Results

Resume Last refresh: 12-Mar-2013 11:00 AM Unprocess Download

	a	b	c	d	e	f	g	h	i
	Document Type	Description	Tracking ID	Urgent	Status	From Team	To Team	Posted	Processed
	Service Referral	BRN:104845, Offer ID:1005411	e5da		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 3:13 PM EST	
	Service Offer	Urgent Offer ID:1005411	f0ad	Yes	Processed	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 3:13 PM EST	12-Mar-2013 10:31 AM EI
	Service Referral	BRN:101251, Offer ID:1005410-Ur	9cac		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 2:07 PM EST	
	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 ES	
	Unspecified	Copy of Regression 2 2Feb26 (2).	a627	Yes	Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 11:11 AM ES	
	Unspecified	Physio.pdf	99ac		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	07-Mar-2013 9:57 AM EST	
	Frequency Update	BRN:102705	aa9a		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	06-Mar-2013 10:16 AM ES	
	Frequency Update	BRN:102705	4b7a		Posted	Central CCAC - CHRIS Mailbox	Central CCAC - Baxter Order of Nurses-K	06-Mar-2013 10:16 AM ES	

Document Type: See list of available document types below
Description: Each document type has a specified document description format that is displayed. Depending on the document type, it may include client's BRN, service offer ID, regular or urgent message and type of communication (e.g., referral package, external communication etc.).
Beside each Description link there is a download icon:

	Document Type	Description	Tracking ID	Urgent	Status	From Team
	Client Update Noti	New Client Assessment	0c16		Posted	Central West CCAC - CHRIS Mailbo:
	Client Update Noti	New Client Assessment	6bc9		Processed	Central West CCAC - CHRIS Mailbo:

Click on the icon to download that one single document.
Tracking ID: the last 4 characters of the 32-character Tracking ID assigned to every message/notification
Urgent: Yes, if user who sent the message checked off the Urgent box (blank if not urgent)
Status: either Posted or Processed
From Team: prefixed with the organization the team belongs to
To Team: prefixed with the organization the team belongs to
Posted: date/time stamp of when the message got posted to Inbox
Processed: date/time stamp when the message was opened/viewed/ downloaded

Document Types

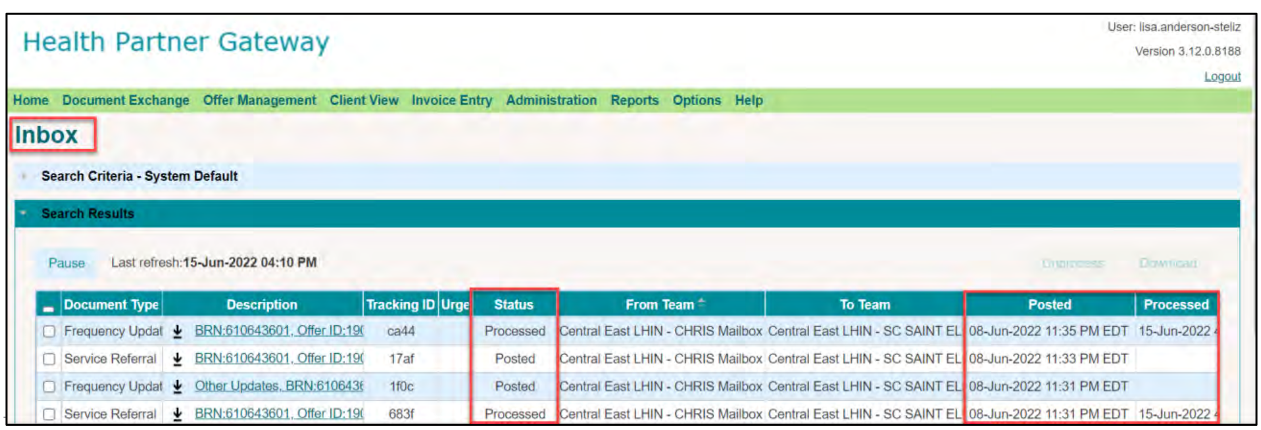
Document/Notification Type	Description
Unspecified	Any document type that is received that is not generated in or sent out of CHRIS
Service Offer	An offer from an organization to a Provider to deliver services to a client
Service Referral	Client information details sent to a Provider from an organization when a service offer has been accepted
Frequency Update	Change/update to client's service frequency
E&S Order	Equipment and Supply orders for vendors
BR – PS	Billing reconciliation file for purchased services
BR – E&S	Billing reconciliation file for equipment and supplies
ODB – Notif	Ontario Drug Benefit notification received by Pharmacy HPG users
PR Response	Provider Report Response – response from CHRIS Automated Provider Reports – receive as PXML file
Service Offer – Email Notification	Notifies provider team that an email has been sent to provider user(s) to let them know there is an offer waiting for a response in HPG
Client Update Notification	May either be Referral Package notification or a Provider Notification

Client Information	External Communication Package – PDF document containing client documents and/or notes
Outcome Based Pathway Notification	Outcome based pathway notification
Outcome-Based RA-PS	Outcome based pathway notification
Organization Delegation	Notification sent when a CHRIS Admin delegates or undelegates a local organization to manage their own administrative functions (Self User Management feature)
Adjustment Report – 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

Document Status

Documents and notifications in Document Exchange (**Inbox and Sentbox**) can be in one of two statuses:

- Posted
- Processed



Posted

The status of ‘Posted’ means that the document has been received in the recipient team’s **Inbox** and it has yet to have action taken on it – whether it is opened/viewed or downloaded.

HPG will display the date and time a notification/document reached or got ‘posted’ to HPG.

Processed

The status of ‘Processed’ means that the document has been retrieved - either opened/viewed or downloaded - by the recipient team.

The date and time will populate the Processed field when that document has had action taken on it.

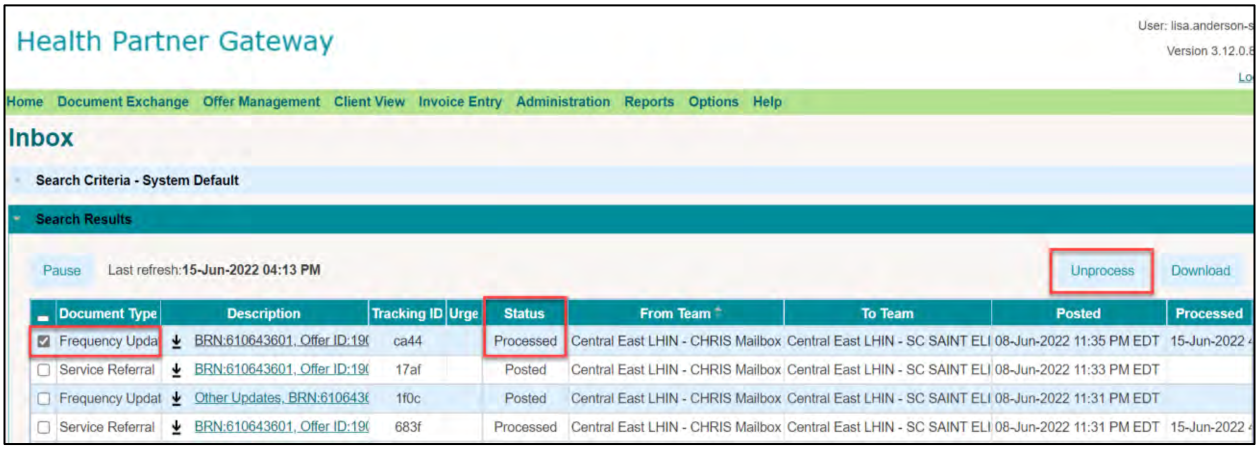
A document/notification can be processed more than once, however, the date/time stamp from the original processing will remain.

Unprocessed

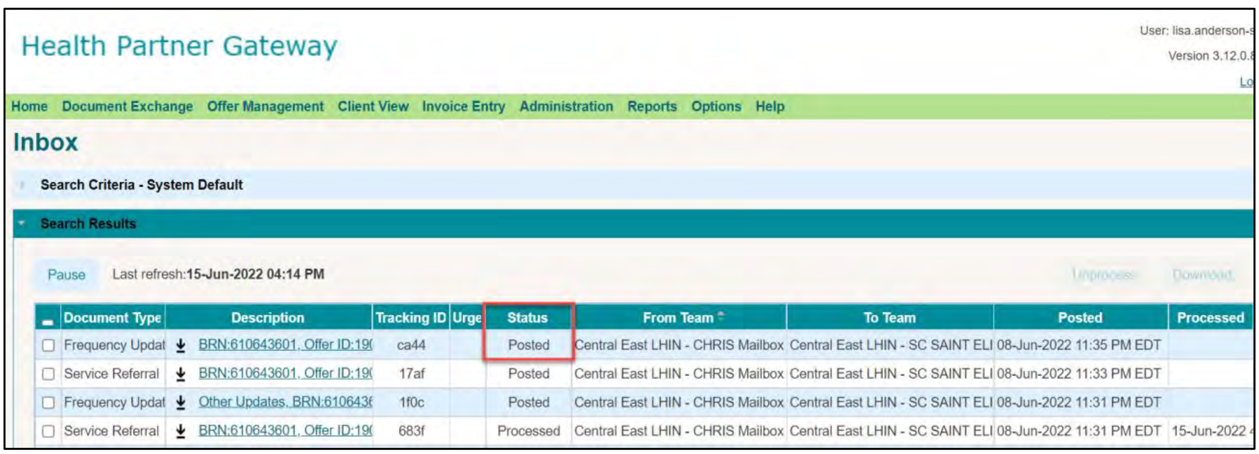
Users who have been assigned the ‘Document Receiver’ role now have the ability to reverse the Processed status (unprocess it) and leave it back to just being Posted. To unprocess a document/notification:

- Select the document(s)/notification(s) you would like to unprocess by putting a checkmark in the box beside it

- By selecting the document(s), it will then make the ‘Unprocess’ button available for selection. Click on Unprocess



The selections are now Unprocessed:



The following Document Types cannot be unprocessed:

- Service Offer
- ODB Notification
- PR – Response
- SO – Email Notification
- Billing PS
- Billing E & S
- CSR Upload Document
- Organization Delegation Notification

Retention Periods

Posted and Processed documents are only retained inside HPG for a limited period of time. HPG is not meant to be a repository and for security and privacy reasons, information will only be retained for a certain amount of time.

The retention time for POSTED messages has been updated to 30 days. The retention time for PROCESSED messages has been updated to 14 days.

At the top of every hour, the HPG system will automatically perform a 'cleanup' process that removes documents from the system that has exceeded the standard retention periods. Cleared documents will be permanently removed from the **Inbox** and **Sentbox** but will remain in the **Audit Log**.

Users **cannot** manually delete documents from the **Inbox** or **Sentbox** – they must wait until the document has surpassed the retention period.

Open a Document

Click on the Document Description link:


Search Results

Pause Last refresh: 28-Feb-2013 04:09 PM

Unprocess Download

Document Type	Description	Track	Urgen	Status	From Team	To Team	Posted	Processed
Client Update Notification	New Client Assessment	0c16		Posted	Central West CCAC - CHRIS Mailbo:	Central West CCAC - HPG-P-01-DO	21-Feb-2013 9:44 AM	
Client Update Notification	New Client Assessment	6bc9		Processed	Central West CCAC - CHRIS Mailbo:	Central West CCAC - HPG-P-01-DO	18-Feb-2013 3:56 PM	19-Feb-2013 11:42 AM
Client Update Notification	New Client Assessment	68c1		Posted	Central West CCAC - CHRIS Mailbo:	Central West CCAC - HPG-P-01-DO	18-Feb-2013 10:17 AM	
Service Referral	BRN:102554, Offer ID:100284	c8ec		Processed	Central West CCAC - CHRIS Mailbo:	Central West CCAC - HPG-P-01-DO	18-Feb-2013 10:13 AM	18-Feb-2013 10:18 AM
Client Update Notification	New Client Assessment	21de		Processed	Central West CCAC - CHRIS Mailbo:	Central West CCAC - HPG-P-01-DO	18-Feb-2013 9:50 AM	18-Feb-2013 10:16 AM
Service Referral	BRN:102554, Offer ID:100284	a919		Posted	Central West CCAC - CHRIS Mailbo:	Central West CCAC - HPG-P-01-DO	13-Feb-2013 11:19 AM	
Service Referral	BRN:102554, Offer ID:100284	565e		Processed	Central West CCAC - CHRIS Mailbo:	Central West CCAC - HPG-P-01-DO	11-Feb-2013 2:24 PM	13-Feb-2013 10:40 AM

Page 1 of 1 7 record(s) found

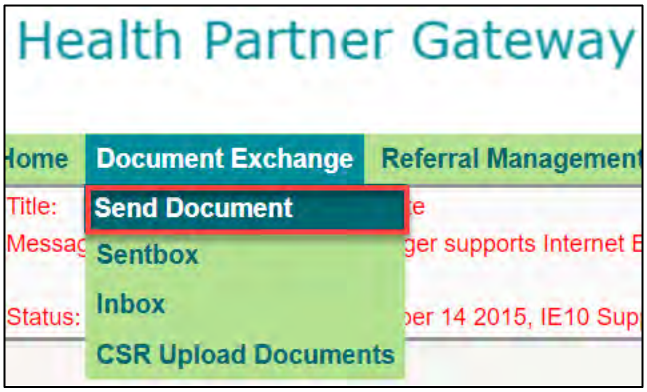
System will open a viewable format of the document/notification and sets the Status to 'Processed'. System will also update the Processed column with the date and time the document was opened.

Send Document

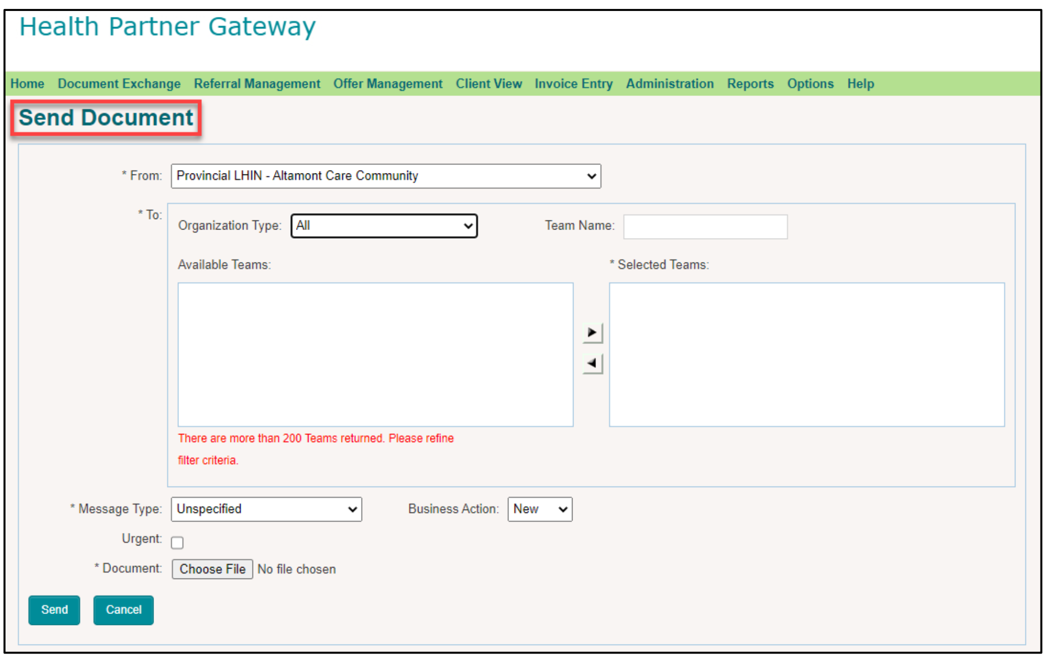
The Send Document screen allows you to send an unspecified document to an organization's HPG inbox. This method may be used to send either client related documents or non-client documents.

For those organizations and Health Partners that have implemented CSR (Client Services Report) Upload – which allows Health Partners to upload client related documents directly into the client's file in CHRIS, that would be the preferred method for sending client-related documents.

To send unspecified documents:
Mouse over **Document Exchange** drop-down menu and select Send Document.



The Send Document page will open:

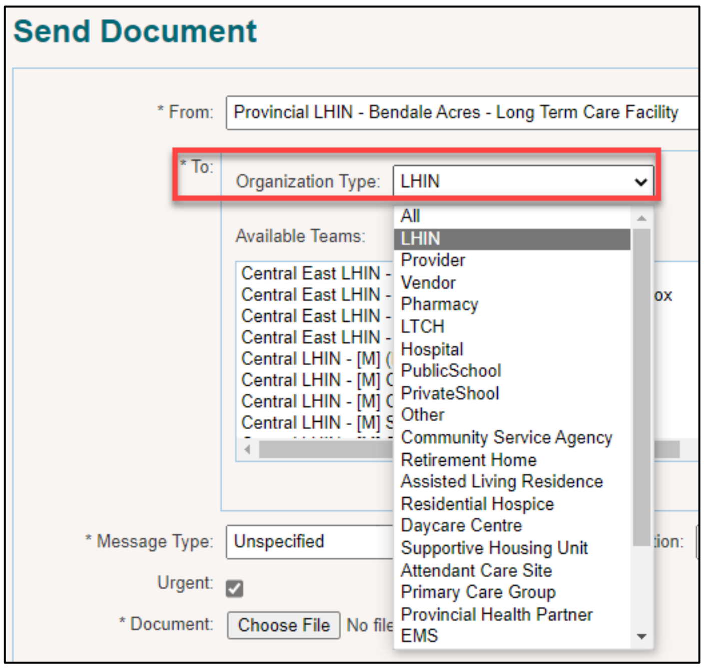


Complete the following mandatory fields:

From: if you belong to more than one team - select the appropriate team in the drop-down list; or if you belong to one team - the field will auto-populate

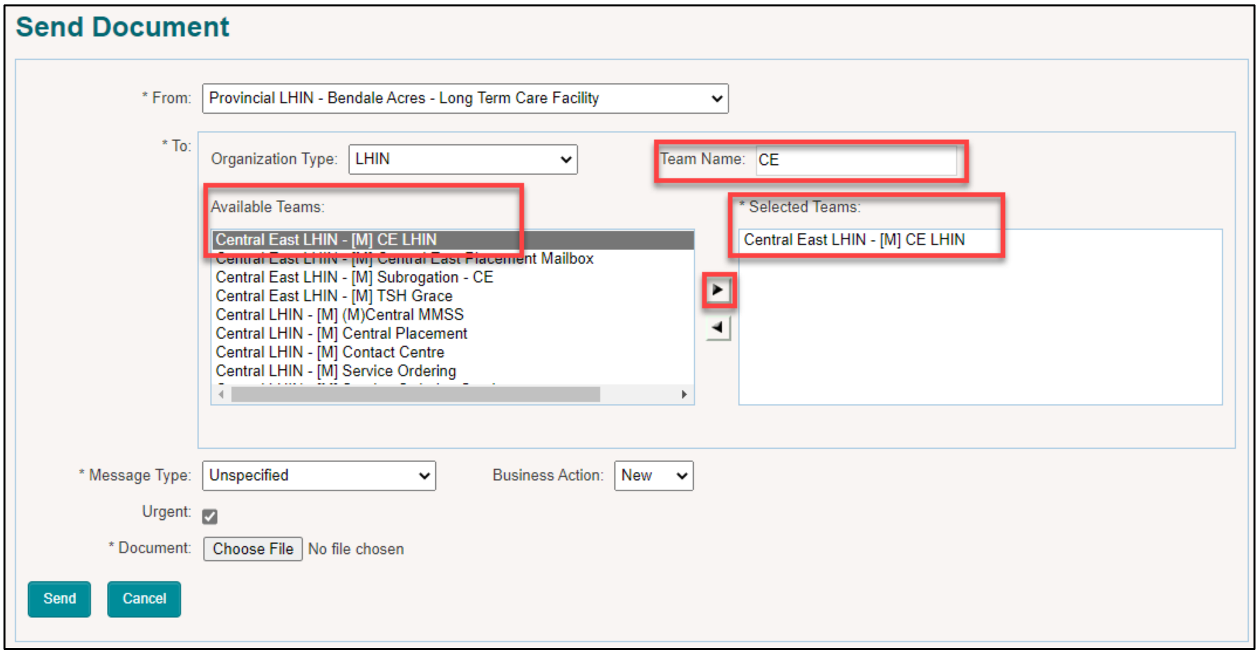
To: Contains two search filters - **Organization Type** and **Team Name**

- Select **LHIN** from the **Organization Type** drop-down menu (default is All):



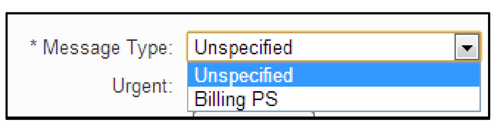
Health Partner users can only send documents to a LHIN – not to any other organization type.

- Select the **Team Name** directly from the list of **Available Teams** or perform a search in the **Team Name** smart look up field
- To move an **Available Team** to the **Selected Team**, highlight the name of the team and click the right arrow



Message Type: select the appropriate **Message Type** option available - options will depend on the Team the user belongs to:

- For **Service Provider** User (user who belongs to a Service Provider Team):
    1. Unspecified – for any non-specific document type (any format)
    2. Billing PS – for when billing/invoice files are being sent (and the billing is not being sent via Manual Invoice Entry)
    3. CSR Upload Document – option available if provider is using CSR Upload

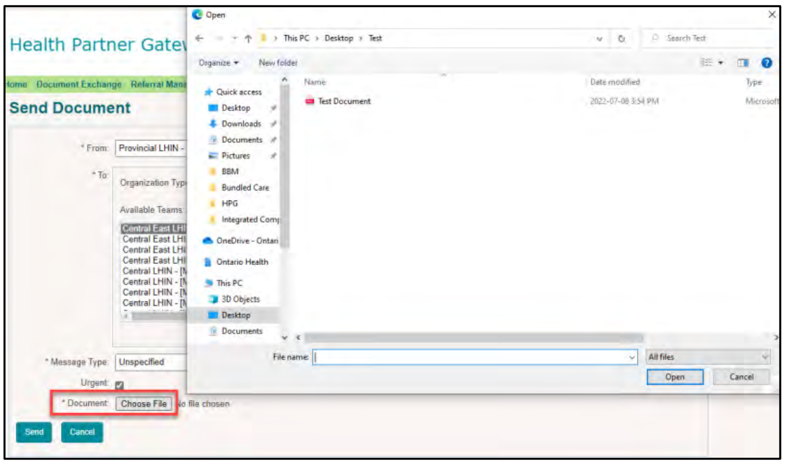


- For **Equipment and Supplies Vendor** User (user who belongs to a E&S Vendor Team):
    1. Unspecified – for any non-specific document type (any format)
    2. Billing E&S – for when billing/invoice files for equipment and supplies are being sent (and the billing is not being sent via Manual Invoice Entry)

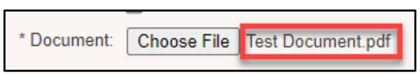
- For all other **Local Organizations** (Community Service Agency, Assisted Living, Hospice, etc.) and **Provincial Teams** (Hospitals, LTCH, Pharmacies):

1. Unspecified – for any non-specific document type (any format)

Document: click **Choose File** and browse your local drive to attach the document you are sending



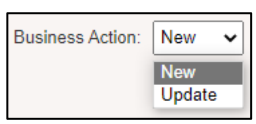
Once attached, the document name will appear in the **Document** field, see example below:



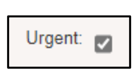
Only one document can be sent at a time - multiple files can be sent in a .zip folder.

Optional Fields:

- Select the appropriate option in the **Business Action** field:



- Select urgent if required (optional field) by adding a checkmark to the **Urgent** box – this will indicate in the recipient's HPG Inbox that the file is Urgent (will be indicated with a red checkmark)



Once all the fields are completed, click **Send** to send the document to the chosen recipient:

A Document Submission confirmation window will display, click OK:

Sentbox

The HPG Sentbox displays a log of the documents that are sent by a particular HPG team. The logged in user must be a member of the sending HPG team to view these records as well as have one of the following roles assigned:

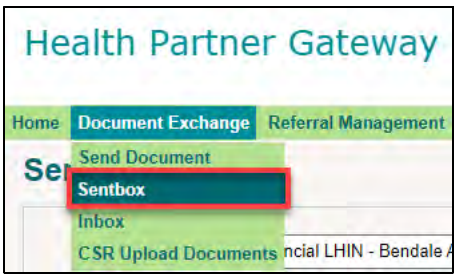
- Document Receiver
- Document Viewer
- Document Sender

External users (i.e., health partner users) can view the following types of documents in the Sentbox:

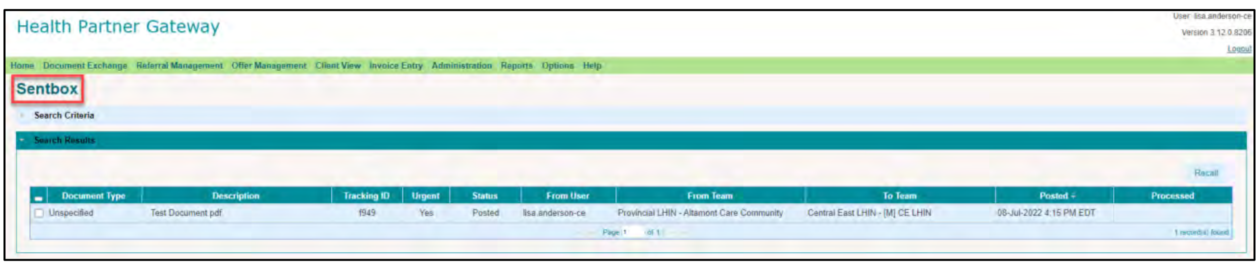
- Unspecified – an unspecified file
- Billing PS – Purchased Services billing file
- Billing E&S – Equipment and Supplies billing file

- CSR Upload Document – Client Service Report uploaded document sent by a service provider user

From the Document Exchange drop-down menu, select Sentbox.



The Sendbox page will open:



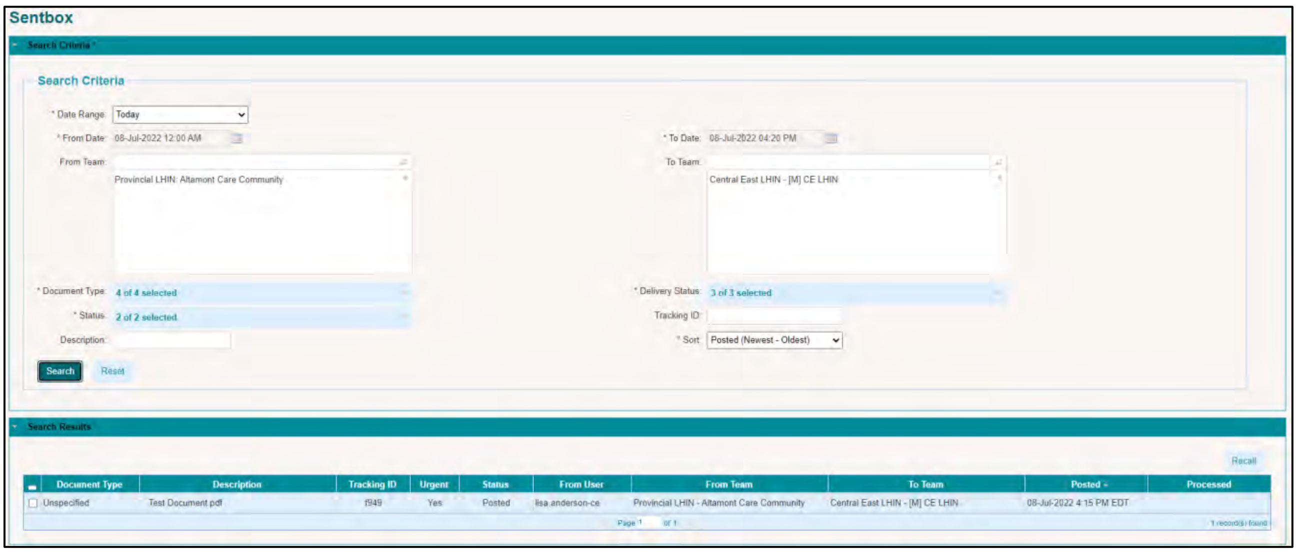
Search Results list provides all results that reflect the Search Criteria default (i.e., all sent items from the last 30 days from all teams, all document types, either posted or processed, with delivery status of either not attempted, delivered, and failed –sorted from newest at the top to the oldest at the bottom).

Search Criteria

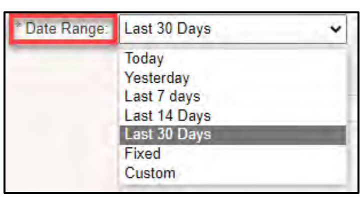
To customize your search results, expand the Search Criteria section by clicking on the light blue **Search Criteria** band at the top:

Ontario Health

Use the filters to customize your search:

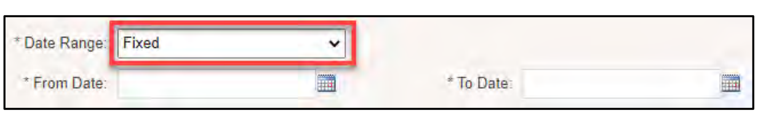


Date Range: default is set to Last 30 days; select the correct date range from the drop-down menu:

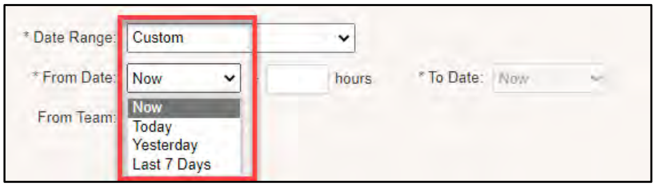


From Date and To Date: default current date and time minus 30 days – the **From Date** and **To Date** will automatically reflect the date range selected

- If **Date Range** selected is **Fixed**, the **From Date** and **To Date** will be empty for you to complete:

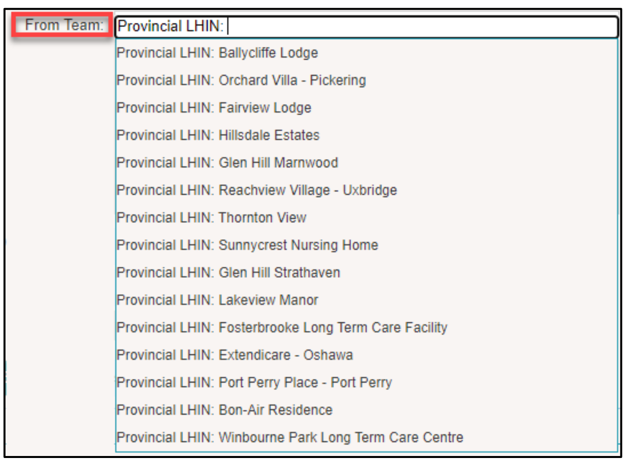


- If **Date Range** selected is **Custom**, select the **From Date** from the options in the drop-down list, the **To Date** will default to **Now** and current time

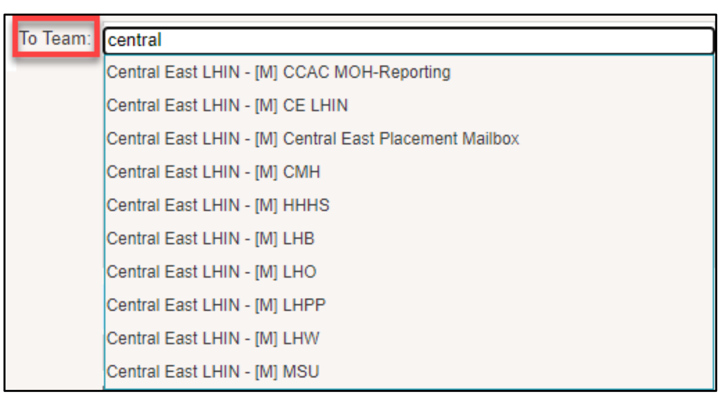


  - Other **Custom** options for **From Date** are: **Today; Yesterday;** or **Last 7 days**
  - Another **Custom** option for **To Date** is**: Today** (specify the time using the Hour and Minute slide bars)

From Team: use the smart look up to filter the Sentbox to only show documents from a **selected From Team**; you can select all teams you are a member of:

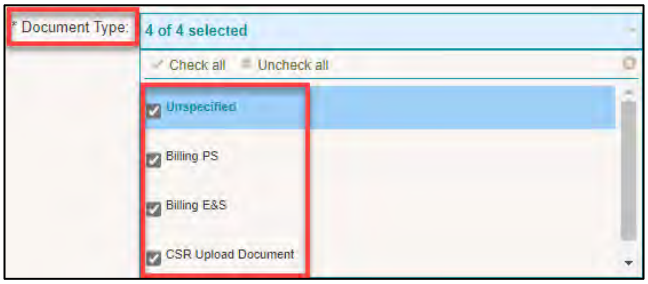


To Team: use the smart look up to filter the Sentbox to show documents from a selected **To Team**; one or more teams can be selected:

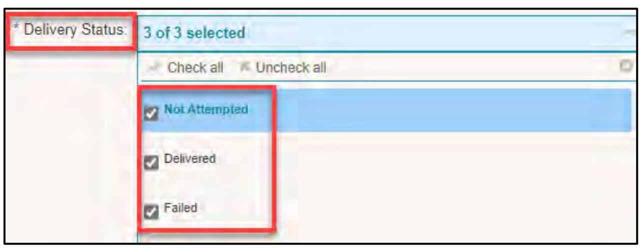


Ontario Health

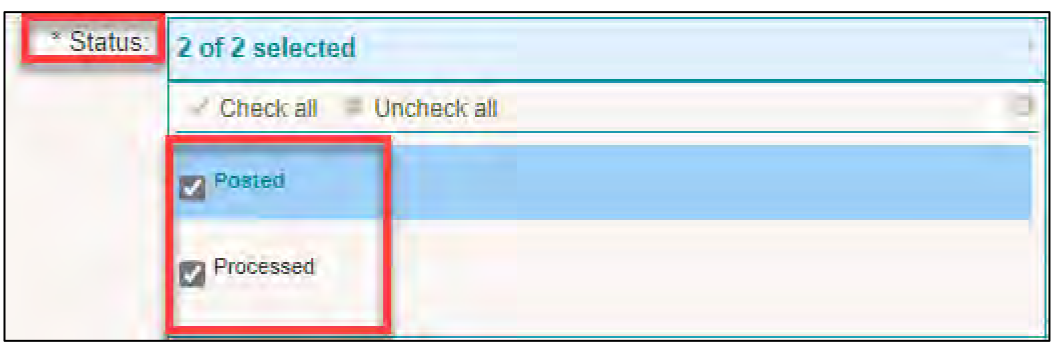
Document Type: default to ‘All’; user can select a document type to show the selected type only:



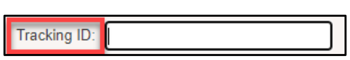
Delivery Status: default to ‘All’; user can filter for ‘Not Attempted’, ‘Delivered’ and ‘Failed’:



Status: default to **All**; user can select **Posted** or **Processed**:



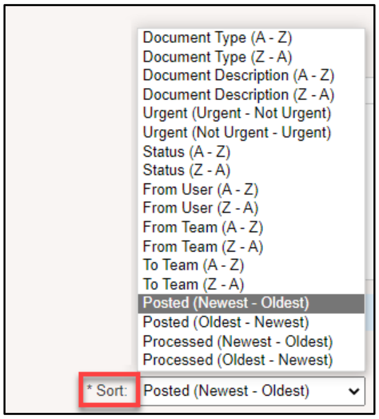
Tracking ID: the tracking ID is a 32-character alphanumeric string; to search by the Tracking ID, enter the last 4 characters of the ID:



Description: free text field where you may search by the document description:

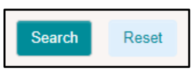
Ontario Health

Sort: default to 'Posted (Newest – Oldest); select from the drop-down the primary sort order for the search results to be displayed:



Search: click to review results

Reset: click to reset filters to default settings



Search Results

The **Search Results** list provides results that reflect the filter selections in the Search Criteria. The results details display the same attributes as the Inbox (i.e., Document Type, Description, Tracking ID, Urgent, Status, From Team, To Team, Posted and Processed columns).

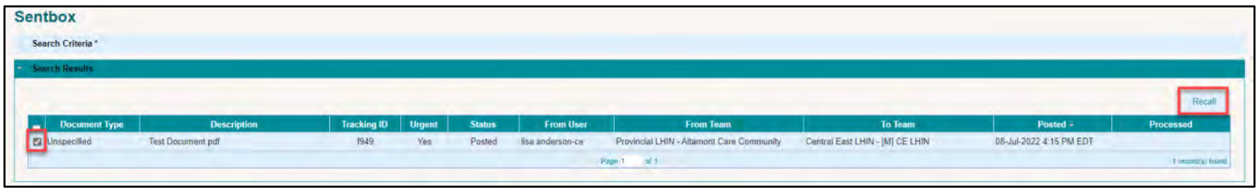
There is no download icon beside the document description and there is no option to unprocess a document. Download icon looks like this:

You do, however, have the ability to Recall a sent unspecified document.

Recalling a Document

Unspecified documents that have been sent from the Send Documents screen can be recalled so long as the document is still in **Posted** state in the recipient's Inbox. If the document has been processed (opened, viewed, downloaded), then the recall function is not available for that document.

To recall a document, select the un-processed document you wish to recall by placing a checkmark beside the Document Type in the first column (select one or multiple documents to recall) and click the **Recall** button:



The selected document(s) will disappear from the Search Results list, indicating that it has been successfully recalled.

You cannot recall a CSR Upload Document or a Billing file – only Unspecified documents can be recalled.

CSR Upload Documents

Providers are able to upload documents to any active client they are providing service for at an organization that has implemented the Client Service Report (CSR) Upload functionality.

In order to do this, the provider user will require a Client Viewer and Document Sender roles assigned to them.

In HPG, CSR Upload Document history is available in 2 areas:

3.2 CSR Upload Documents tab in the Community Health Portal (CHP)
3.3 Send Documents section of Document Exchange

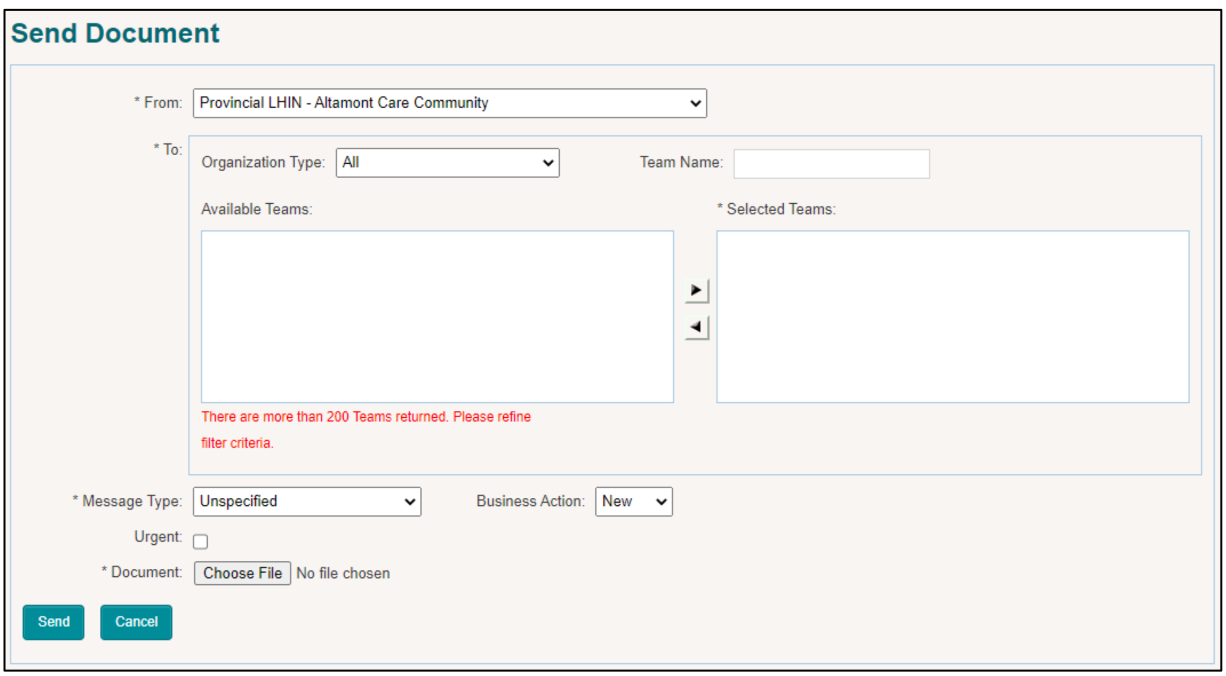
This section will address the CSR Upload in the **Document Exchange** area of HPG.

CSR Upload from Document Exchange

A Provider User with a **Document Sender** role can access the Send Documents page in Document Exchange (where CSR Upload Documents are sent from). The **Document Viewer** role will give access to the CSR Upload Documents History.

Select **Send Documents** from the Document Exchange drop-down menu in HPG:

The Send Document page will open:

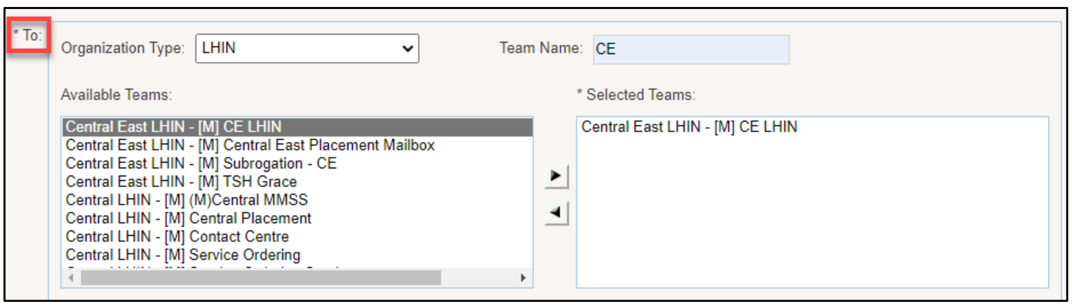


From: drop-down menu will display a list of Provider HPG Teams that the logged Provider User is a member of and is associated with the organization of the selected client. The default **From Team** will display the organization that owns the team followed by the Provider Team name.

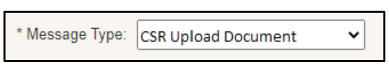
- If the user belongs to only one Provider Team associated with the organization of the selected client, then the field is display only (no drop-down list).
- If the user belongs to more than one Provider Team that is associated with the organization of the selected client, then the field is a drop-down list and user must select the Provider Team.

To: select **LHIN** from the drop-down list for **Organization Type**. Select the CHRIS Mailbox of the organization that the client belongs to and use the ▶ icon to move the organization team from the **Available Teams** window to the **Selected Teams** window.

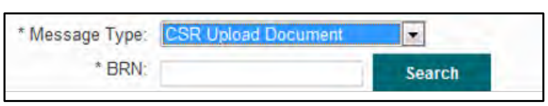
- Alternatively, you can search for the Team Name using the smart look up.



When the CHRIS Mailbox is selected, CSR Upload Document becomes available for selection in the **Message Type** drop-down list. Select **CSR Upload Document**:



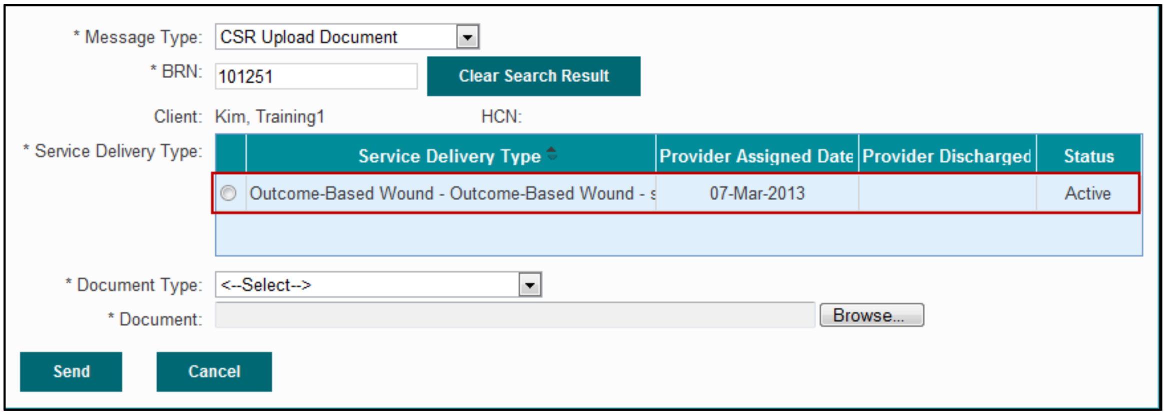
Once selected, a **BRN** field will appear. You must enter the BRN of the client you are uploading documents for (no other search parameters are available here) and click **Search**:



If it doesn't find a match, you will see an **Error Message.** Select **Clear Search** Result to enter another **BRN.**

A successful match will result in the **Client Name** and **HCN** displaying for validation and a prompt to select the **Service Delivery Type** pertinent to the document being uploaded.

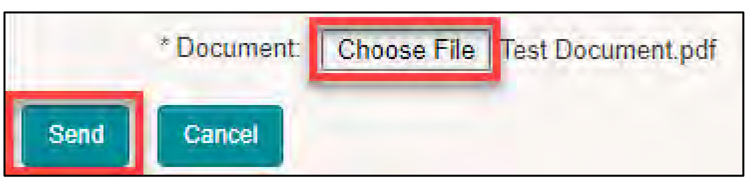
If you are delivering more than one service type, they will all be listed for you to select. Use the radio button to select the correct Service Delivery Type.



From the **Document Type** drop-down menu, select the Document Type name for the document that will be uploaded.

The Document Type list is pre-determined in CHRIS and each Document Type is set to file at a specific level in DocuShare®

Attach the document for upload by clicking on **Choose File** and finding the document in your local folders for upload and click **Send**:



A **Confirmation** window will appear, click **Yes** to proceed. At that point, a **Document Submission** message will appear to confirm success upload to HPG.

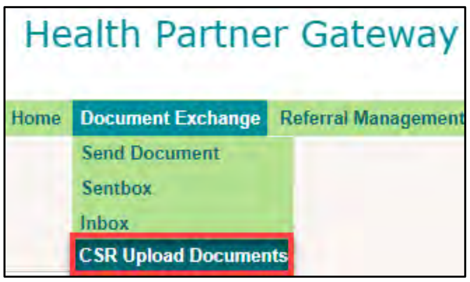
A record of the uploaded document can be viewed in the **Sentbox** of **Document Exchange** (Provider User must have Document Viewer role assigned to do this).

The CSR Upload document will be **Posted** and **Processed** in the **Sentbox** while the document is still in **Submitted** state in the CSR Upload Document page.

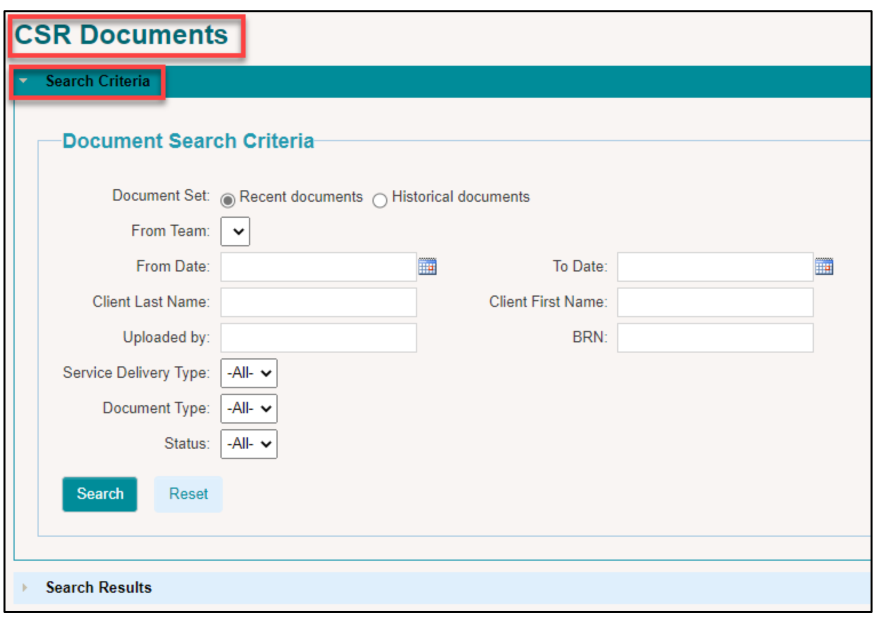
CSR Upload Document History

The **CSR Upload Documents** history maintains a list of all the CSR documents that have been uploaded to DMS/CHRIS and is viewable from.

Mouse over Document Exchange drop-down menu and select **CSR Upload Documents**:



The **CSR Documents** page will open – the **Search Criteria** will be expanded (default) to display the Document Search Criteria filters:



The CSR Upload Documents history is separated into two pages:

- Recent documents
- Historical documents

A document becomes a **Historical Document** when a user has selected and archived a **Reviewed** document record from the **Recent Documents** page.

Move a **Reviewed** document record from the **Recent CSR Upload Documents** page to the **Historical Upload Documents** page by clicking on the **Archive** button:

CSR Upload Documents Search Results – Recent CSR Upload Documents:

- Default view displays the **Recent CSR Upload Documents** page (list will display only those documents that have not been selected to be moved to the **Historical CSR Upload Documents** page)
- The list includes **ALL** clients that have been uploaded from HPG
- The document records are sorted based on the document upload date – from the oldest (at the top) to the newest
- 20 records will display at a time with paging

You can search for a particular **CSR Upload Document** record on the **Recent CSR Upload Documents** page by viewing the **Search Results** list. However, if the list is very long, or you need to find a specific document record, open the **Search Criteria,** and add filters.

Each document uploaded is identified on each line with the following attributes (highlighted in red) and refer to the HPG Provider side information collected during the CSR Upload process:

- BRN

- Client Name
- Service Delivery Type: as selected by the Provider from the client profile
- Document Type: as selected by the Provider from the drop-down menu
- Upload Date/Time: when document was successfully uploaded
- Uploaded By: the Provider User that uploaded the document

The 3 columns (highlighted in purple) provide information from CHRIS:

- Actioned By: the CHRIS user that has opened or processed/reviewed the document
- Actioned Date/Time: the date and time the above action was taken by the CHRIS user
- Status: the current Status of the document in CHRIS

Each **Status** is colour coded:

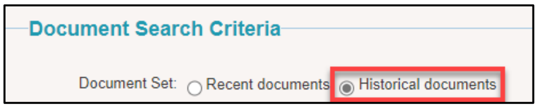
Status	Description
Submitted (white)	Indicates that the document has been uploaded to HPG but has not reached DocuShare® and CHRIS yet. A message is sent to CHRIS to notify that a document has been uploaded in HPG – the message is received in **Tasks** tab > **Provider Reports** and in the client record Provider level **Details** tab > **Provider Notifications** > **Inbound Notification**
Received (white)	Indicates that the document has been saved in DocuShare® and a link has been created in CHRIS.
Alert: Document Pending Review (pink)	Indicates that a received document has not been viewed/accessed within a specific period of time (time period determined by CHRIS Administrator) and is pending review.
In Progress (yellow)	A document has been opened/viewed/processed and is in the process of being reviewed.
Reviewed (green)	Indicates that the CHRIS user has completed his/her reviewed and has marked the document as reviewed in CHRIS.

The list can be sorted by any of the column names (e.g., you can sort by BRN, Service Delivery Type, Document Type, Upload Date/Time, Uploaded By, Actioned By, Actioned Date/Time and by document Status).

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

Historical CSR Upload Documents

- To search for a document upload stored in **Historical CSR Upload Documents**, select the corresponding radio button.

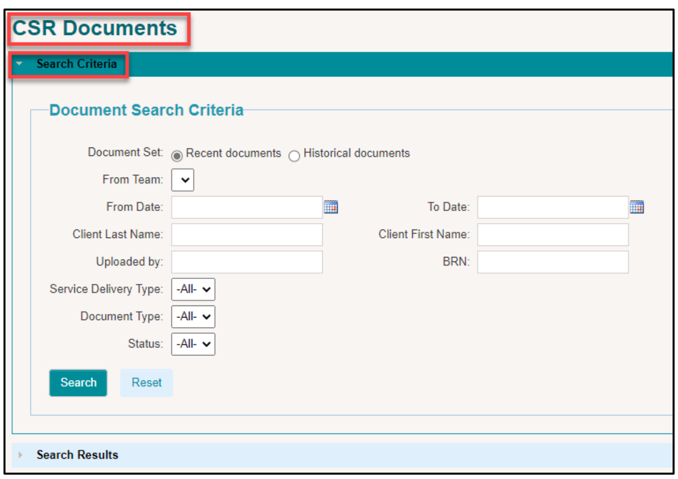


- No history will be displayed upon initially navigating to this screen.
- You must open the Search tool and enter **Search Criteria** and click **Search** before any upload records can be displayed.

If accessing from within a client profile in CHP, the document list will be limited to those document records stored in the **Historical CSR Upload Documents** that have been uploaded for that specific client.

In Document Exchange, the list includes ALL uploaded documents that have been moved to **Historical CSR Upload Documents** (for all clients).

Search Criteria



From: drop-down menu will display a list of Provider HPG Teams that the logged Provider User is a member of and is associated with the organization of the selected client. The default **From Team** will display the organization that owns the team followed by the Provider Team name.

- If the user belongs to only one Provider Team associated with the organization of the selected client, then the field is display only (no drop-down list).
- If the user belongs to more than one Provider Team that is associated with the organization of the selected client, then the field is a drop-down list and user must select the Provider Team.

From Date and To Date: the date range fields will default one week from current date and can be changed but cannot exceed the maximum searchable date range of 7 days.

- Both the **From Date** and the **To Date** are free-text fields, however you can choose to use the Calendar widget to select the date you would like to enter in the field.

Complete 1 or more of the following Search Criteria:
Client Last Name: will be populated if in CHP Client profile, otherwise blank field
Client First Name: will be populated if in CHP Client profile, otherwise blank field
Uploaded by: First and Last name of the Provider User that uploaded the document
BRN: enter in the Billing Reference Number
Service Delivery Type: defaults to All
Document Type: defaults to All
Status: IF document set was set to recent docs = defaults to all; IF document set was set to historical document = greyed out

Click **Search** to view the **Search Results**.
Click **Reset** to clear the **Search Criteria** (defaults restored and other fields empty).