



# Health Partner Gateway Reference Guide for Health Partners

## MODULE 6 Self-User Management

## Revision Table

Date	Version	Author	Comments
May 14, 2013	2.1	Darlene Patgunarajah	Module 6 – HPG 3.0 enhancement: Self-User Management for health partners
June 2013	2.1	Darlene Patgunarajah	<b>RFC – 2291 HPG Audit Report:</b> Section 7 – Audit Report – the date range option in the search criteria has been increased from 14 to 31 days; retrieved records in the report has been increased from 2000 to 10000 records
April 2019	3.0	Mark Boucher	Rebranding of name and logo from CCAC and OACCAC to LHIN and HSSOntario  updated to CHRIS Release 3.5 User Management functionality

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## 1. INTRODUCTION

### 1.1 Background & Overview

The Health Partner Gateway (HPG) provides a single solution to securely exchange health information between a LHIN 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 LHIN 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 LHINs 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 LHIN 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.

As of HPG Release 3.0 (coinciding with CHRIS Release 2.2), the **Self-User Management** enhancement was implemented to enable LHINs to have the option of transferring administration responsibilities to Health Partner Organizations. This module will address this functionality.

### 1.2 Overview of HPG Functionality

The HPG is one application, featuring a main area that links to each of the 14 LHINs. Each LHIN 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 LHIN network, logging in as a LHIN user/LHIN Admin user using Active Directory credentials
- Externally - from outside the LHIN 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 LHIN 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
- As of HPG 3.0, a team can be managed by either a LHIN or a Provincial Health Partner Organization
- A single user can belong to many teams
- A team can have members (users) from other LHINs
- A user can either be a person or a system (such as CHRIS)
- Teams are either designated as a LHIN Team or Health Partner Team (either a local organization or a provincial health partner organization)
- Only users set up as LHIN users can be members of LHIN (internal) Teams
- Only users that are set up as Health Partner users can be members of Health Partner Organization (external) Teams

### 1.3 Self-User Management

HPG Self User Management enables LHINs to transfer administration responsibilities to the Health Partner Organizations. Health Partners can:

- Manage the user accounts for their organization including functionality to add, edit, inactivate, and unlock user accounts
- Assign functional roles to user accounts
- Assign user membership to their organizational teams
- Have improved auditing reports to monitor user access and activity

These changes will result in the following benefits:

- Health Partner Organizations will have more autonomy and will remove obstacles in being able to access the most up-to-date information they need in order to provide quality care to clients.
- Health Partner Organizations will not be impacted by HSSOntario/LHIN timeliness and availability to respond to their requests.
- Expect a decrease in user account and password sharing among Health Partner Organization users
- Decrease in workload for LHIN's and HSSOntario to manage Health Partner User accounts
- Increased audit capabilities to monitor user activity and access to patient health information

Providers, Vendors and Hospital HPG users must be assigned the **Health Partner Administrator** or **Health Partner Support Admin** roles in HPG in order to access the module.



## 1.4 Module 6 Layout

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

- Section 2: Administration
- Section 3: Reports

Other modules available include:

- Module 1: Introduction to HPG
- Module 2: Document Exchange
- Module 3: Offer Management
- Module 4: Community Health Portal
- Module 5: Referral Management

## 2. ADMINISTRATION

The Administration menu is available to HPG Administrators and allows access to the various admin functions in HPG. The sub-menu options available will depend on the type of HPG Administrator accessing the menu.



This menu is available to:

- HSSOntario Based Administrator (internal HPG)
- LHIN Based Administrator (internal HPG)
- **Health Partner Administrator** (external HPG)
- **Health Partner Support Admin** (external HPG)
- Provider Team Administrator (external HPG)

Accessing Role	Administration Sub-Menu Items Available
LHIN Based Administrator	<ul style="list-style-type: none"> <li>• User Management</li> <li>• User-Team Management</li> <li>• Organization Delegation Management</li> <li>• External Communication Teams</li> <li>• Email Notification Management</li> </ul>
<b>Health Partner Administrator</b>	<ul style="list-style-type: none"> <li>• User Management</li> <li>• Email Notification Management</li> </ul>
<b>Health Partner Support Admin</b>	<ul style="list-style-type: none"> <li>• User Management</li> <li>• Email Notification Management</li> </ul>
Provider Team Administrator	<ul style="list-style-type: none"> <li>• Email Notification Management</li> </ul>
HSSOntario Based Administrator	<ul style="list-style-type: none"> <li>• User Management</li> <li>• User-Team Management</li> <li>• Local Org Delegation Management</li> <li>• Email Notification Management</li> <li>• External Communication Teams</li> <li>• Document Process Failures</li> <li>• Configuration</li> </ul>

Health Partners (providers, vendors and hospitals) users must be assigned the **Health Partner Administrator** role or the **Health Partner Support Admin** role in order to have the Administration tab available to them upon logging into external HPG.

**The assignment of the Health Partner Administrator role must be done by HSSOntario** (i.e. cannot be assigned by the LHIN once the organization has been delegated). An authorization form may be needed to initiate this process.

**Health Partner Administrators** can assign **Health Partner Support Admin** roles to other users.

Provider Team Administrator role can only be assigned to those users belonging to organizations that have NOT been delegated to a Provincial Health Partner Organization – and they are assigned by the managing LHIN.

When you log in as a **Health Partner Administrator** or a **Health Partner Support Administrator**, the Administration tab will be available - including the following two sub-tabs:

- User Management
- Email Notification



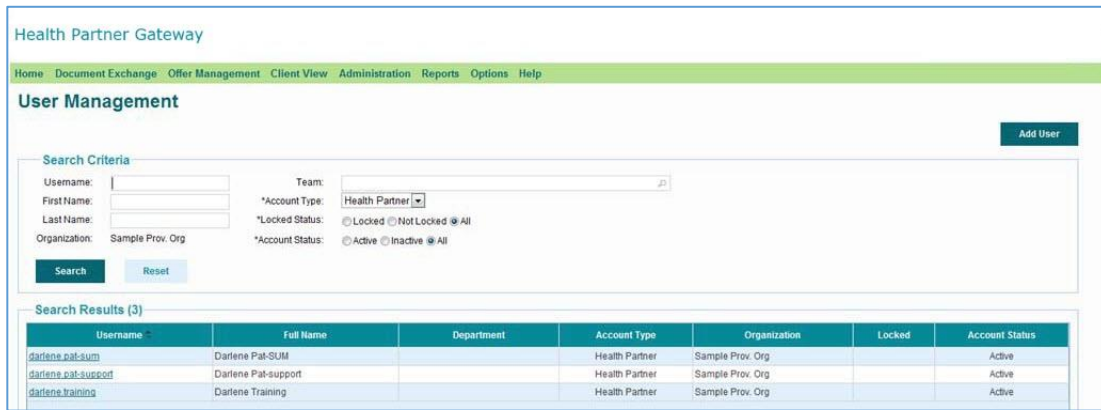
## 2.1 User Management

The User Management screen allows HPG Administrators to search for HPG user accounts they are associated with.

From this screen, **Health Partner Administrators** are able to view, add, edit and delete HPG users that belong to their Provincial Health Partner Organization. They are not able to search for System Accounts. (Note: accounts can only be deleted if they have never been accessed / logged into.)

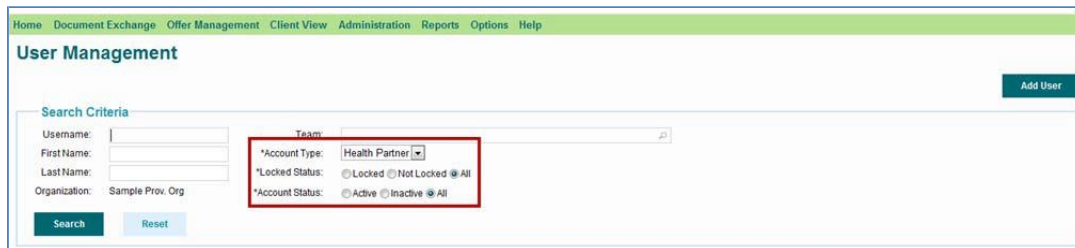


### Health Partner Administrator View:




The screen will display default search results based on the default search criteria (which varies based on the type of HPG Administrator.)

For **Health Partner Administrators**, the default search criteria displays: ALL user accounts owned by the PHPO (Account Type = “Health Partner”, Locked Status = “All”, Account Status = “All”):



### Custom Search

HPG features Smart Look-Up (SLU) functionality, which facilitates searching by displaying matching content as you type. SLU fields are identified by a magnifying glass symbol. 

Using the Search Criteria fields, you can customize your user account search:

**Username** – this is the name the user has been assigned to use when logging into HPG;

**First Name & Last Name** – User’s first and last names **Organization** –

You will only be able to select your own PHPO **Team** – SLU search to find a specific team owned by your PHPO

**Account Type** – defaults to ‘Health Partner’; no other drop-down options **Locked**

**Status** – defaults to ‘All’ status; can filter by Locked or Not Locked **Account Status** –

defaults to ‘All’ status; can filter by Active or Inactive To reset the Search Criteria back to default, click the ‘Reset’ button.

### Search Results

The Search Results list will display results based on the default search criteria. The number of results returned is indicated in brackets beside the Search Results title:

Search Results (3)						
Username	Full Name	Department	Account Type	Organization	Locked	Account Status
<a href="#">darlene.pat.sum</a>	Darlene Pat-SUM		Health Partner	Sample Prov. Org		Active
<a href="#">darlene.pat-support</a>	Darlene Pat-support		Health Partner	Sample Prov. Org		Active
<a href="#">darlene.training</a>	Darlene Training		Health Partner	Sample Prov. Org		Active

The following information is provided in the results table:

**Username** – the login name following the firstname.lastname convention

**Full Name** – User’s first and last names as indicated in the account details

**Department** – displays the department the account user belongs to (if it was indicated in their account details – optional field)

**Account Type** – Health Partner

**Organization** – Your PHPO name

**Locked** – Will display ‘Yes’ if the user had 3 failed login attempts

**Account Status** – indicates whether an account is Active or Inactive



By clicking on any of the column headers, the list can be sorted by ascending or descending alphabetical order.

Click on a Username link to select it for viewing/editing.

Search Results (3)						
Username	Full Name	Department	Account Type	Organization	Locked	Account Status
<a href="#">darlene.pat.sum</a>	Darlene Pat-SUM		Health Partner	Sample Prov. Org		Active
<a href="#">darlene.pat-support</a>	Darlene Pat-support		Health Partner	Sample Prov. Org		Active
<a href="#">darlene.training</a>	Darlene Training		Health Partner	Sample Prov. Org		Active

### LHIN User Account Details

User Details

Details

Teams

**User Type:** Health Partner

**User Account Information:**

\* Organization: Sample Prov. Org

\* First Name:

\* Last Name:

\* Username:

\* Password:

Email:

Department:

Account Status:  Active  Inactive

Last Login Date: 15-May-2013 2:02 PM EDT

**\* User Roles:**

Document Sender

Document Receiver

Document Viewer

Offer Manager

Manual Invoice Subscriber

Client Viewer

Referral Manager

Health Partner Support Administrator

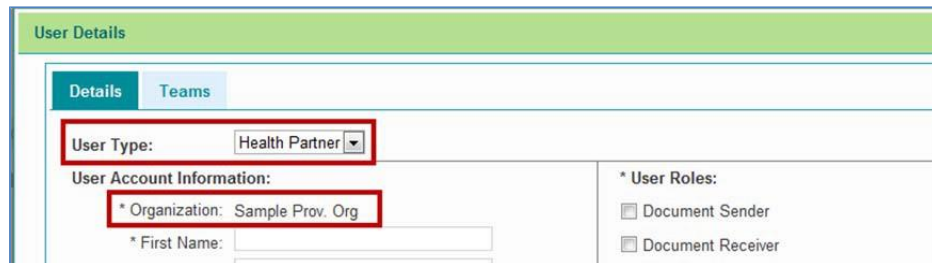
### 2.1.1 Adding a Health Partner User

Only **Health Partner Administrators** can add new users. The Add User button is not available for users logged in as **Health Partner Support Administrators**.

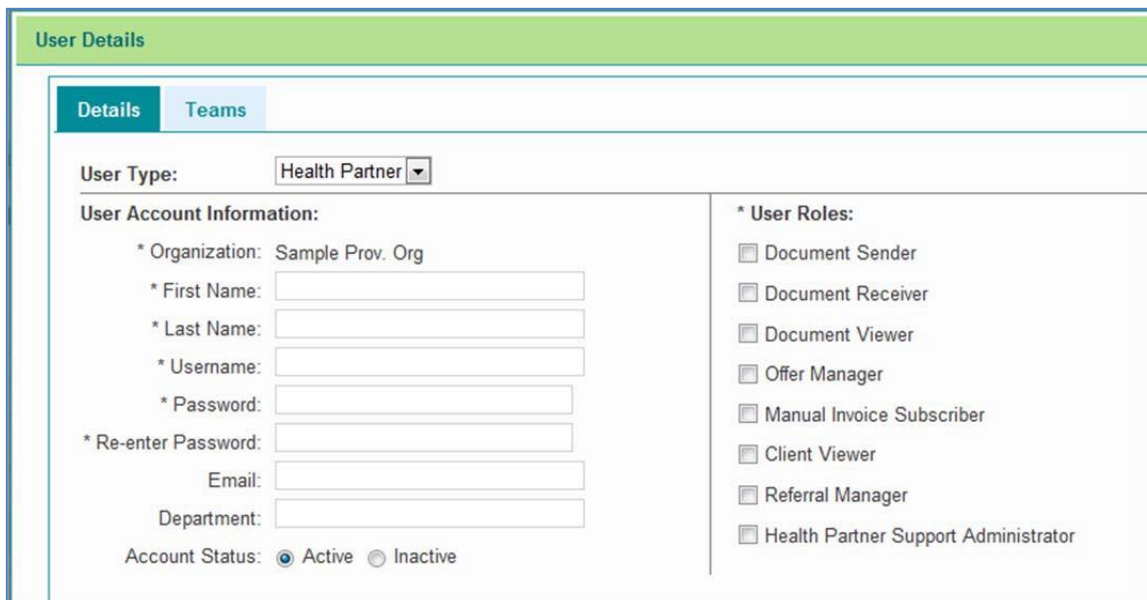
To add a new user, click on the Add User button at the top right of User Management screen:



User Type will automatically be Health Partner (no other choice) and Organization field will be your PHPO name:



Complete the mandatory (and optional) fields:



Complete the **First Name** and **Last Name** fields. As you enter each field, the **Username** field will begin to auto-populate with the first and last names as you type them out, in the 'firstname.lastname' format.

A '**Checking username**' message will pop up in red text as you type out the First and Last Names. This ensures that there are no duplications of usernames in both internal and external HPG across the province (each user account must have a unique username, so if you have 2 Jane Smiths, one of their usernames will have to be differentiated).

The **Password** field is also a mandatory field. Assign a temporary password that conforms to the Password rules (please refer to Module 1 Reference Guide for Health Partners) and provide this password to the user. Re-enter the password for confirmation in the **Re-enter Password** field.

Upon first login, the user will be prompted to change the temporary password to one of their choosing (it must also follow the Password rules).

Complete the **Email** and **Department** fields if desired. Ensure the **Account Status** is Active.

Assign one or more **User Roles** and **Save** the User Details screen (refer to the User Roles table in [Section 2.1.1.1](#))

### 2.1.1.1 HPG Roles

The following table describes the roles available to Health Partner account users:

HPG Role	Description
Document Sender	User can view the list of documents received and sent in the Inbox and Sentbox. They can send documents but cannot open or save documents received in the Inbox
Document Receiver	User can view the list of documents received and sent in the Inbox and Sentbox for the Teams they are associated with. They can open or save documents received in the Inbox.
Document Viewer	User can view the list of documents received and sent in the Inbox and Sentbox for the Teams they are associated with. They cannot open or save documents
Offer Manager	Provider user can access the Offer Management tab in external HPG where he/she can search, monitor, accept and refuse service offers
Manual Invoice Subscriber	User can search for and enter purchase services and rental invoices

Client Viewer	User can search for a client and view client information in the Community Health Portal (Client View tab)
Referral Manager	Users may be from a Hospital, Long Term Care Home, Complex Care facility, Short Stay Interim or Short Stay Convalescent facility, Community Services Organization, Rehab Facility or expanded role (Adult Day Programs, Assisted Living, Supportive Housing); users can access the Referral Management tab and sub tabs depending on the Health Partner Organization they belong to.
Health Partner Support Administrator	User has limited administrative capabilities for user accounts belonging to their Provincial Health Partner Organization – they are able to search and view user accounts, unlock accounts/reset passwords; add/manage email notification lists



Remember that the **Health Partner Administrator** role can only be assigned by HSSOntario.

### 2.1.2 Teams

In addition to the role(s) assigned, Team membership in HPG determines what information is accessible by a specific HPG user. Every HPG user must be associated with a team in order to have access to any information.

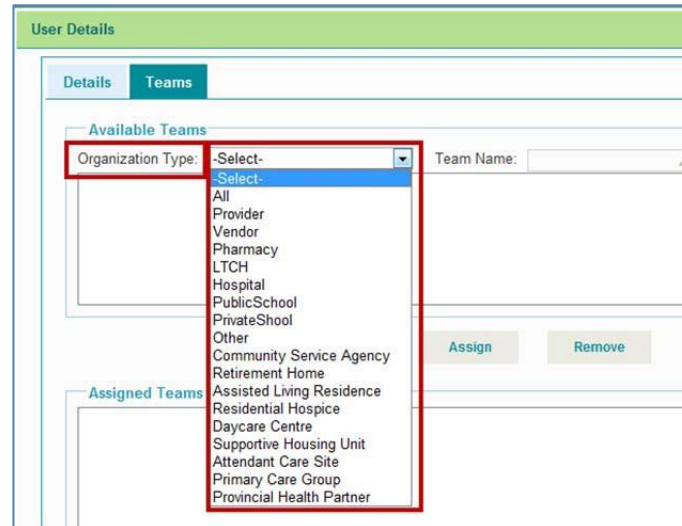
Each Health Partner Organization (based on the Provider/Vendor Org Code) per LHIN branch has one Team automatically created for them. This team is used to receive all documents/notifications from each of the LHINs' CHRIS that they partner with (*Offers, Referrals, Frequency Changes, etc.*). If additional teams are required by a Health Partner Organization, they will need to discuss this with the LHIN and submit a cST to HSSOntario.

E.g. Bayshore provides services to clients from both Central LHIN and Toronto LHIN. Therefore, Bayshore HPG users may be associated with both teams (Central LHIN – Bayshore Team and Toronto LHIN Bayshore Team) which mean that when they log in and view their Inbox, they will see documents/notifications from both LHINs.

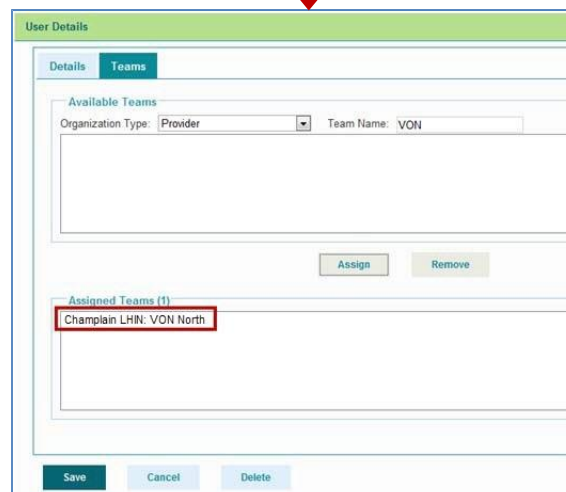
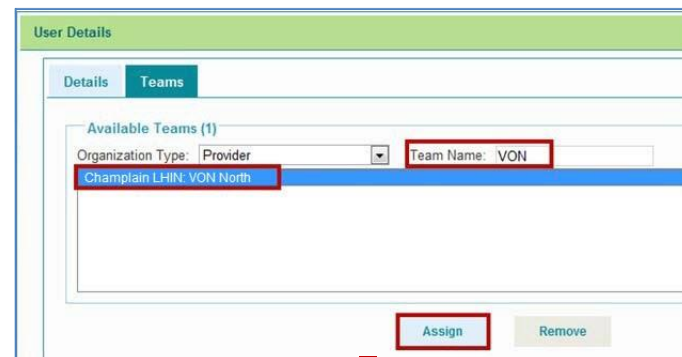
To add a user to a team, open the **Teams** tab, from within the user's account Details:



Under the 'Available Teams' section at the top, select the **Organization Type** from the drop down menu:



Use the **Team** SLU search to narrow your search, highlight your choice and click Assign:



To add additional teams, repeat the process.

Click **Save**.


### 2.1.3 User Account Maintenance

Access to User Accounts may be necessary when user account details have changed (e.g. name change), or when role or team assignments need to change. A common reason for accessing a user's account is when a user has locked him/herself out after having had 3 failed login attempts.

#### 2.1.3.1 Unlocking a User Account

**Health Partner Administrators** and **Health Partner Support Administrators** can unlock accounts for existing users that belong to their PHPO. To unlock an account:

1. Search for the locked user account

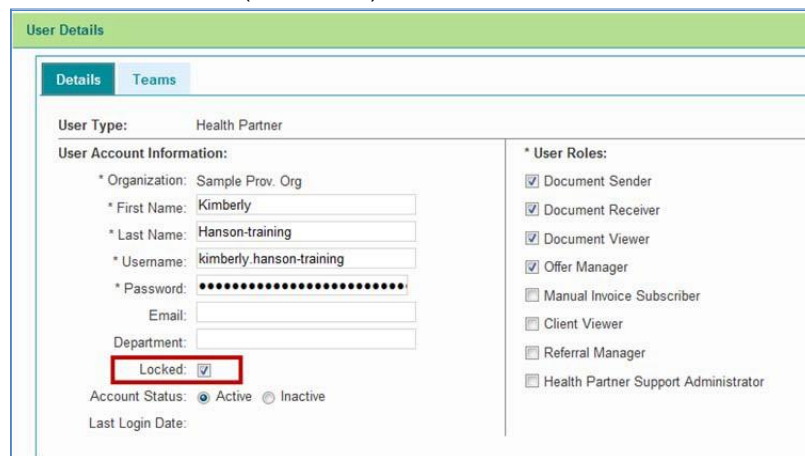
 Use the Locked Status search criteria to help narrow the results by selecting the 'Locked' radio button.

2. Click on the Username link to access the account details screen



Search Criteria						
Username:	Team:	*Account Type:	Health Partner			
First Name:		*Locked Status:	<input checked="" type="radio"/> Locked <input type="radio"/> Not Locked <input type="radio"/> All			
Last Name:		*Account Status:	<input type="radio"/> Active <input type="radio"/> Inactive <input checked="" type="radio"/> All			
Organization:	Sample Prov. Org					
Search		Reset				
Search Results (1)						
Username	Full Name	Department	Account Type	Organization	Locked	Account Status
<a href="#">kimberly.hanson-training</a>	Kimberly Hanson-training		Health Partner	Sample Prov. Org	Yes	Active

3. Clear the check mark for locked (uncheck it) and Save.



**User Details**

Details Teams

User Type: Health Partner

User Account Information:

\* Organization: Sample Prov. Org

\* First Name: Kimberly

\* Last Name: Hanson-training

\* Username: kimberly.hanson-training

\* Password: ●●●●●●●●●●

Email:

Department:

Locked:

Account Status:  Active  Inactive

Last Login Date:

\* User Roles:

Document Sender

Document Receiver

Document Viewer

Offer Manager

Manual Invoice Subscriber

Client Viewer

Referral Manager

Health Partner Support Administrator

 You do not need to assign a temporary password to unlock an account.

### 2.1.3.2 Removing a User Account

In order to ensure LHINs and external partners are able to successfully audit HPG user activity, the ability to delete an HPG User Account is not available (the exception being when the user account has never been accessed / logged into).

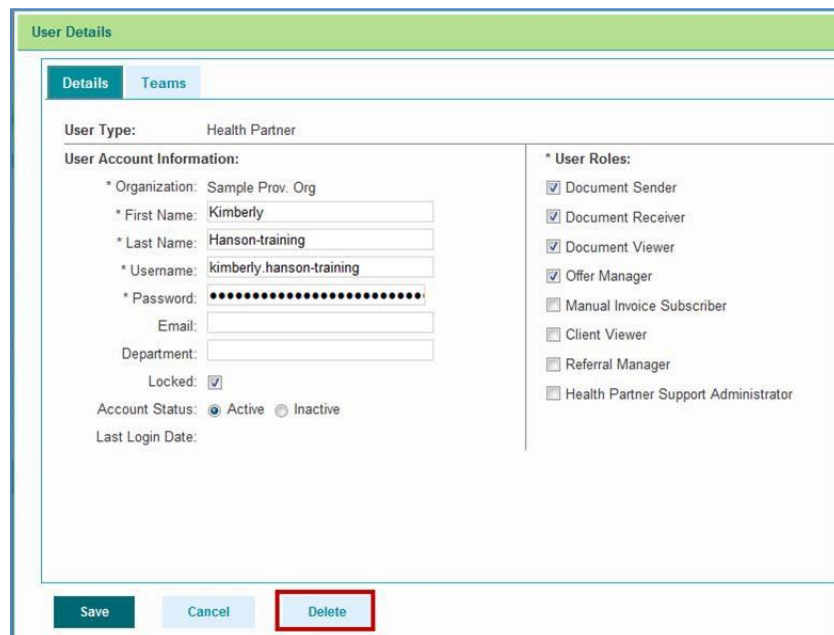
Only **Health Partner Administrators** can remove/delete a user account. This is different from being Inactive.

When an account is Inactive, the user’s profile still exists in the HPG database, even though the status is Inactive (e.g. user is off on maternity leave and the account is inactivated while the user is off).

When an account is deleted, all user account information is deleted (i.e. no record of the user exists in HPG).

To remove an account:

1. Search for the user account to be removed
2. Select the user account from results list by clicking on Username link
3. On the Account Details screen, click Delete at the bottom of the screen



The screenshot shows the 'User Details' interface. At the top, there are tabs for 'Details' and 'Teams'. Below this, the 'User Type' is 'Health Partner'. The 'User Account Information' section includes fields for Organization (Sample Prov. Org), First Name (Kimberly), Last Name (Hanson-training), Username (kimberly.hanson-training), Password (masked with dots), Email, and Department. There are also checkboxes for 'Locked' (checked) and 'Account Status' (Active selected, Inactive unselected). A 'Last Login Date' field is present but empty. On the right side, the '\* User Roles' section lists several roles with checkboxes: Document Sender (checked), Document Receiver (checked), Document Viewer (checked), Offer Manager (checked), Manual Invoice Subscriber (unchecked), Client Viewer (unchecked), Referral Manager (unchecked), and Health Partner Support Administrator (unchecked). At the bottom of the form, there are three buttons: 'Save', 'Cancel', and 'Delete'. The 'Delete' button is highlighted with a red rectangular border.

4. Confirmation box will appear ‘Are you sure you want to delete the user account for <firstname.lastname>?’ Click Yes.

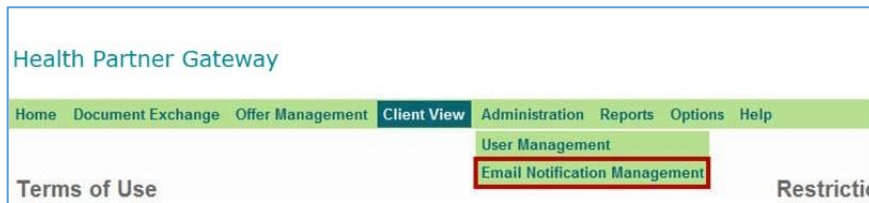


## 2.2 Email Notification

The Email Notification feature allows Health Partner Organizations to set up email notification lists for message types that they receive in the HPG Inbox. When they receive a message to their HPG Inbox, the system will automatically generate an email notification and send this notification to the email addresses indicated in the email notification list.

**Health Partner Administrators** and **Health Partner Support Administrators** have access to Email Notification Management and are able to search lists, add new lists and manage existing ones.

From the Administration drop-down menu, select **Email Notification Management**:



On the Email Notification Management page, all lists for local organization teams managed by the PHPO will display:

**Email Notification Management** Add List

Search Criteria  
 List name:   
 Team:

Search Results

Name	Team	Document Types	Email Addresses
DMS_TAs	Champlain - VON North	Unspecified Service Referral E&S Order ODB - Notif Client Update Notification Client Information	jemmali@outlook.com dpatgunarajah@email.com
Finance Group	Champlain - VON North	Unspecified BR - PS BR - E&S	jemmali@me.com stacey.grammick@ont.ca
HPG Admin Group	Champlain - VON North	Unspecified Outcome-Based - RA-PS Organization Delegation Notification	kimberly.hanson@ont.ca clare.corrado@ont.ca
VON - Offer Management Team	Champlain - VON North	Service Offer Service Referral PR Response Client Information Outcome-Based Pathway Notification	darlene.patgunarajah@ont.ca dsagoli@hotmail.com colleen.poirier@ont.ca

Use the scroll bar to view the entire list – note the total number of records indicated at the bottom right of the screen.

**Name** column – displays the List name (as determined by the user who created the list name)


**Team** column – displays the Team name with owner organization prefixed with the team name

**Document Types** – displays the of list document types selected for the email notification

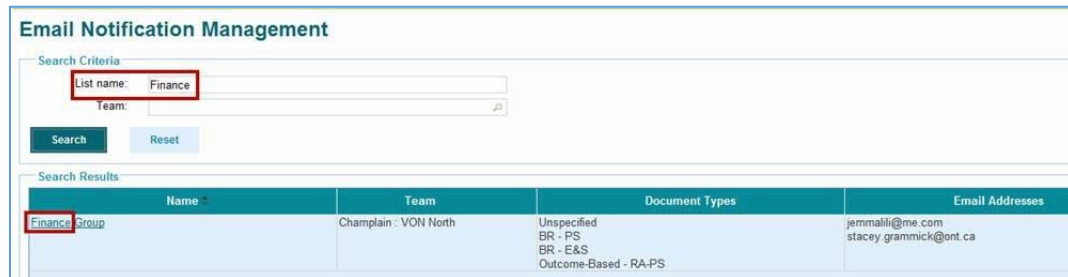
**Email Addresses** – displays the list of email addresses the email notification are sent to

### 2.2.1 Search Criteria

The Search Criteria allows users to search for specific notification lists that match the search filters:



The List name allows user to search by the 'list name' specified by the user who created the list. Type in a word contained in the list name and the results will display all list names that contain that word:



Name	Team	Document Types	Email Addresses
Finance Group	Champlain - VON North	Unspecified BR - PS DR - E&S Outcome-Based - RA-PS	jemmalili@me.com stacey.grammick@ont.ca

Search using SLU and select the Team by highlighting the correct one, then click 'Search':



Home Document Exchange Administration Reports Help

## Email Notification Management

Search Criteria

List name:

Team:

Search

Search Results

- Central LHIN : Bay Haven Retirement Lodge
- Central LHIN : Baycrest Centre for Geriatric Care - Elm Ridge Group Living Residence
- Central LHIN : Bayfield Manor - Retirement Home
- Central LHIN : Bayview Retirement Home
- Central LHIN : Georgian Bay Lodge

Service Update

### 3. REPORTS

The Reports menu is available to **Health Partner Administrators** and **Health Partner Support Administrators**.

**Health Partner Administrators** will have four sub-menu options under Reports:

- Audit Log
- Active User Last Login
- User-Team Membership Summary
- User-Role and Assignment Summary



However, the **Health Partner Support Administrator** user will only have access to one report – the Audit Log – and can only view reports on their own activities within HPG.



#### 3.1 Audit Log


The Audit Log report displays a listing of all user actions that are audited.

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.

**Health Partner Administrators** are able to view the audit log for any user that belongs to their PHPO.

**Health Partner Support Administrators** and non-admin users may also run this report to view the audit activity for their own user accounts.


Generate a report by using the Search Criteria on the Audit Log Report page:



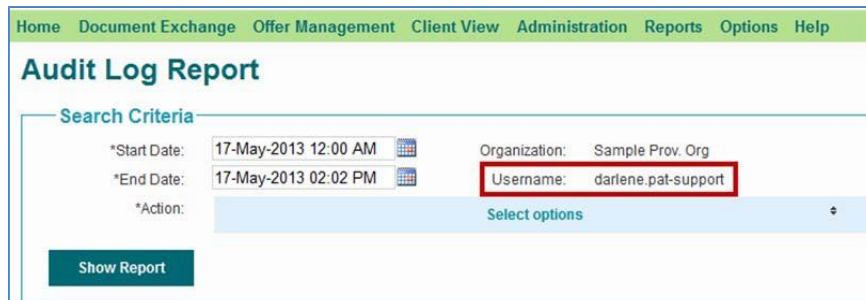
The **Organization** field will be pre-populated with your PHPO name.

You can specify the **Start Date** and **End Date** of the report results (date range). The date corresponds to when the Action took place).

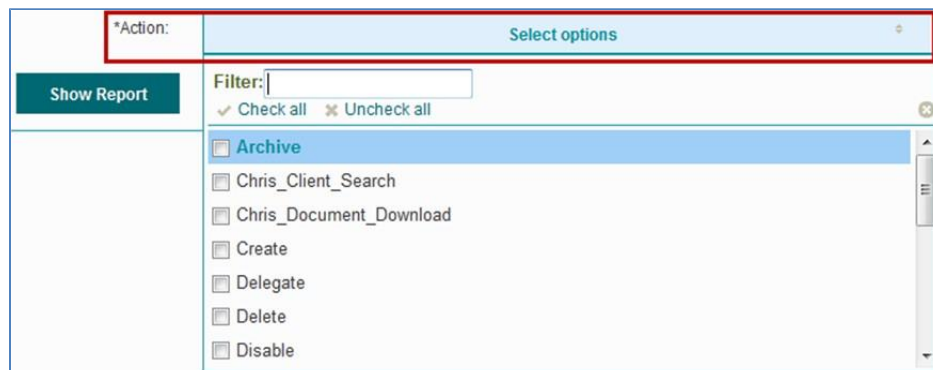
The default for the **Start Date** is 12:00AM of the current date. The default for the **End Date** is the current date and time.

 The date range cannot be more than 31 days.

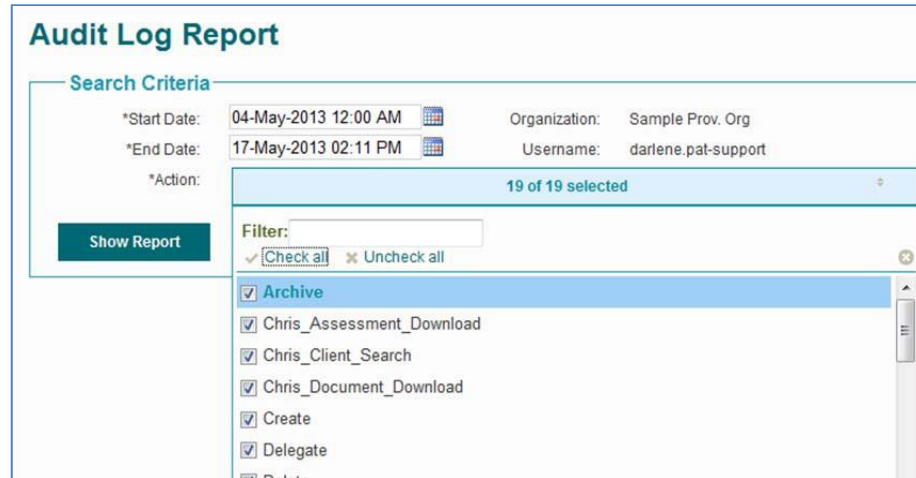
For **Health Partner Administrators**, the **Username** field is a smart look-up that allows you to search and select a particular user that belongs to your PHPO. For **Health Partner Support Administrators** and non-admin users, the username field will display the logged in user's username:



The **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):



For Health Partner Administrators view, when a Username is selected (i.e. Username field is not left blank), then you can select one, multiple or all Actions:



**Audit Log Report**

**Search Criteria**

\*Start Date: 04-May-2013 12:00 AM      Organization: Sample Prov. Org  
 \*End Date: 17-May-2013 02:11 PM      Username: darlene.pat-support  
 \*Action: 19 of 19 selected

**Show Report**

Filter:

Check all     Uncheck all

- Archive
- Chris\_Assessment\_Download
- Chris\_Client\_Search
- Chris\_Document\_Download
- Create
- Delegate

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



\*Action: Select options

**Show Report**

Filter: De|

Check all     Uncheck all

- Delegate
- Delete

Click **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.

The example below displays results for 'All' actions for a specific user:

Organization			
Time	Action	Username	Description
<b>Sample Prov. Org</b>			<b>3 Total: 20</b>
17-May-2013 02:02 PM EDT	Login	darlene.pat-support	User darlene.pat-support Login
17-May-2013 01:29 PM EDT	Login	darlene.pat-support	User darlene.pat-support Login
16-May-2013 03:25 PM EDT	Logout	darlene.pat-support	User darlene.pat-support Logged out.
16-May-2013 03:24 PM EDT	Login	darlene.pat-support	User darlene.pat-support Login
15-May-2013 05:04 PM EDT	Logout	darlene.pat-support	User darlene.pat-support Logged out.
15-May-2013 04:45 PM EDT	Edit	darlene.pat-support	User darlene.training password reset by darlene.pat-support
15-May-2013 04:45 PM EDT	Edit	darlene.pat-support	User darlene.training unlocked by darlene.pat-support
15-May-2013 04:45 PM EDT	Edit	darlene.pat-support	User darlene.training updated by darlene.pat-support
15-May-2013 04:40 PM EDT	Login	darlene.pat-support	User darlene.pat-support Login
15-May-2013 02:04 PM EDT	Edit	darlene.pat-support	User darlene.training password reset by darlene.pat-support
15-May-2013 02:04 PM EDT	Create	darlene.pat-support	User darlene.training assigned role Document Sender by darlene.pat-support
15-May-2013 02:04 PM EDT	Create	darlene.pat-support	User darlene.training assigned role Document Receiver by darlene.pat-support
15-May-2013 02:04 PM EDT	Create	darlene.pat-support	User darlene.training assigned role Document Viewer by darlene.pat-support
15-May-2013 02:04 PM EDT	Create	darlene.pat-support	User darlene.training assigned role Offer Manager by darlene.pat-support
15-May-2013 02:04 PM EDT	Create	darlene.pat-support	User darlene.training assigned role Client Viewer by darlene.pat-support
15-May-2013 02:04 PM EDT	Create	darlene.pat-support	User darlene.training assigned role Referral Manager by darlene.pat-support
15-May-2013 02:04 PM EDT	Create	darlene.pat-support	User darlene.training created by darlene.pat-support
15-May-2013 02:03 PM EDT	Edit	darlene.pat-support	User darlene.pat-support changed password
15-May-2013 02:02 PM EDT	Login	darlene.pat-support	User darlene.pat-support Login
15-May-2013 02:02 PM EDT	Login	darlene.pat-support	User darlene.pat-support Login
			<b>Grand Total: 20</b>

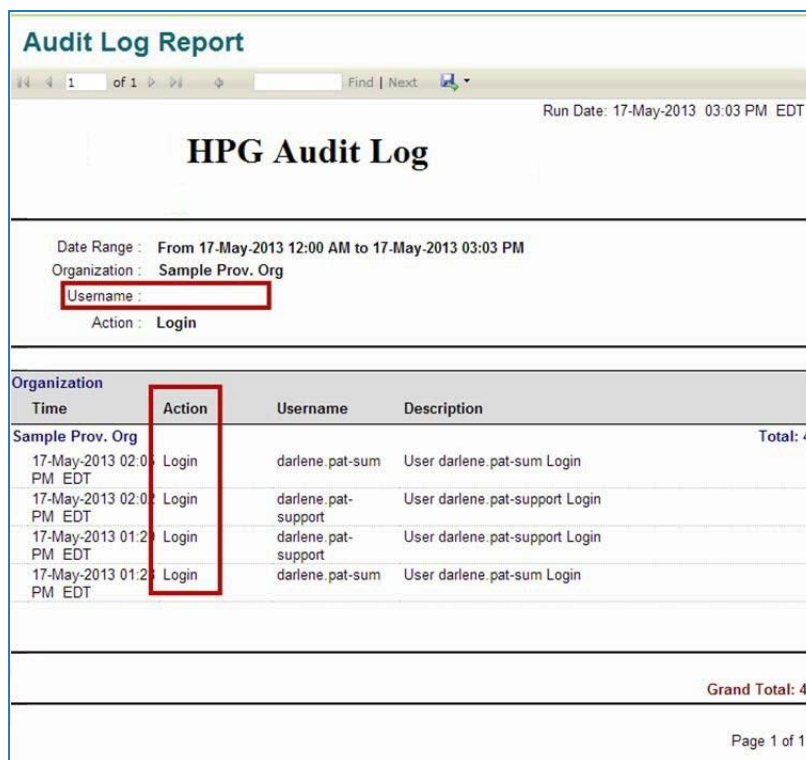
1. The top of the report displays the Search Criteria selected to generate the report
2. The Organization name is displayed at top left of report
3. The total number of records in the grouping is displayed at the top right of report

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

**Description** – displays a description of the action

When a **Username is not selected**, (i.e. Username field is left blank) then you can **only specify a single Action**. The report below displays results for one action (Process) for all users belonging to the LHIN:



**Audit Log Report**

Run Date: 17-May-2013 03:03 PM EDT

**HPG Audit Log**

Date Range : From 17-May-2013 12:00 AM to 17-May-2013 03:03 PM  
 Organization : Sample Prov. Org  
 Username :   
 Action : Login

Organization	Time	Action	Username	Description	Total
Sample Prov. Org					Total: 4
	17-May-2013 02:0 PM EDT	Login	darlene.pat-sum	User darlene.pat-sum Login	
	17-May-2013 02:0 PM EDT	Login	darlene.pat-support	User darlene.pat-support Login	
	17-May-2013 01:2 PM EDT	Login	darlene.pat-support	User darlene.pat-support Login	
	17-May-2013 01:2 PM EDT	Login	darlene.pat-sum	User darlene.pat-sum Login	
<b>Grand Total: 4</b>					

Page 1 of 1

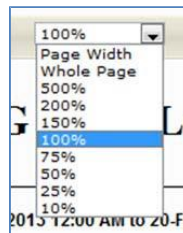
Only **Health Partner Administrators** will be able to see this type of activity report

### 3.1.1 Audit Log Tools

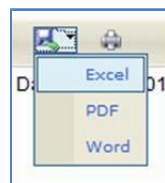
The Audit Log tools found at the very top of the report, right under the HPG menu tabs are similar to the report tools found in CHRIS and function the same way:



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. Page size – select from drop-down menu page view % (zoom/shrink):



3. 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.
4. Export icon allows you to export the report to an Excel, PDF or Wordfile.



5. Print icon allows you to print the report.

### 3.1.2 Action Descriptions

For reference, this table lists all of 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 (from DMS within CHP)

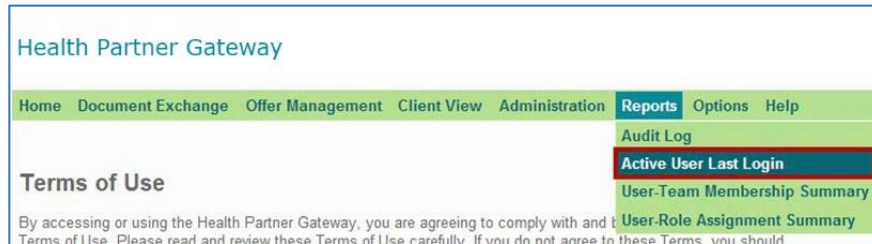


Create	User creates a new user account upon saving the account details OR user has been added to a team OR user assigned a role
Delegate	A local organization is delegated to a provincial organization OR a local organization is un-delegated from a provincial organization (part of Self-User Management feature)
Delete	User's account unassigned role or unassigned from Teams or account removed (accounts can only be deleted if they have never been accessed / logged into.)
Disable	User's account disabled by administrator due to account inactivity – set to 'Inactive'
Edit	User account updated or unlocked, or password reset,
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 logs out
Post	Document posted to the HPG Inbox
Process	Document processed in HPG Inbox (document was opened/ downloaded)
Recall	Recall a posted document
Session_Timeout	Session timed out for user
UnProcess	User has reversed the status of a 'Processed' document/notification back to 'Posted'

### 3.2 Active User Last Login

The Active User Last Login report provides a Team-based summary of active users, their last login date, and the user roles they are assigned. It is available to **Health Partner Administrators**.

From the Reports drop-down menu, select '**Active User Last Login**':

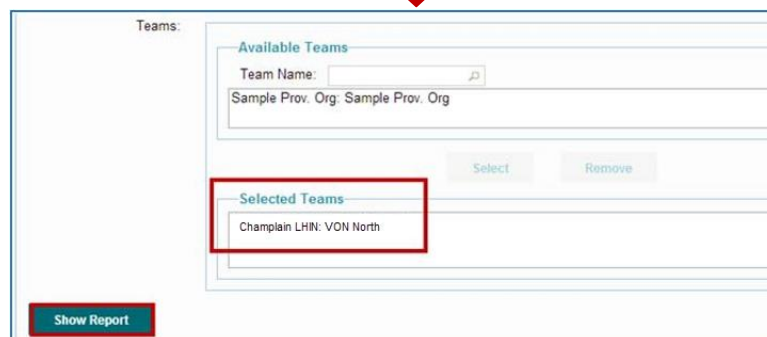
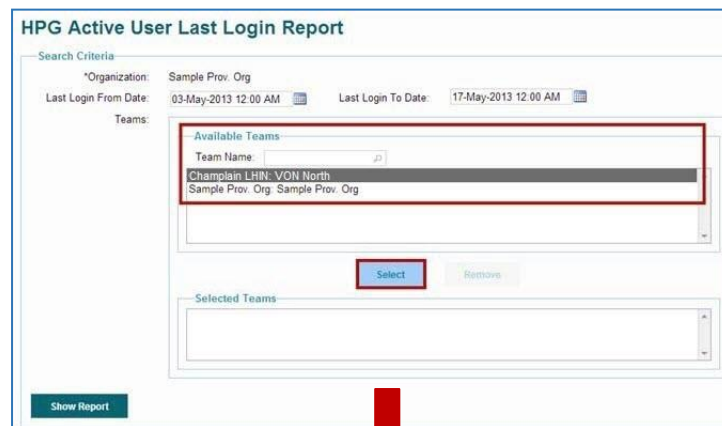


Use the Search Criteria fields to narrow down your report results:

**Organization** field – will default to your PHPO (no other options)

**Last Login From Date** and **Last Login To Date** – select a date range to report on; optional fields

**Teams** - you can use the Team Name SLU search to find an Available Team to select and move to the 'Selected Teams' list, or just highlight a team from the Available Teams list:



If you wish to select more than one team, repeat the process. Click 'Show Report':

An example of how the report would look like (this is a LHIN view with multiple teams selected – the report categories and layout would be the same)

HPG Active User Last Login Report											Run Date: 20-Feb-2013 08:52 PM EST	
Organization:	Central LHIN											
Filter Teams By:	Managed Teams											
Last Login Date Range:	From 01-Sep-2012 12:00 AM to 20-Feb-2013 12:00 AM											
Teams:	Central LHIN : Bathurst nursing service, Central LHIN : Baxter Order of Nurses-K, Central LHIN : Home Medics - k											
Team: Central LHIN : Bathurst nursing service										Total: 13		
User Name	Last Login Date	User Type	Client Viewer	Document Receiver	Document Sender	Document Viewer	Health Partner Administrator	Health Partner Support Administrator	Manual Invoice Subscriber	Offer Manager	Provider Team Administrator	Referral Manager
alireza.user	31-Jan-2013 11:42 AM	Health Partner		X	X	X						
cent.hpprovider.maribel	18-Feb-2013 12:29 PM	Health Partner	X			X			X	X	X	X
darlene.pat-hpg	08-Feb-2013 9:48 AM	Health Partner	X	X	X	X			X	X	X	X
jorge.provider	15-Feb-2013 5:32 PM	Health Partner	X	X	X	X			X	X	X	X
marylou.smith-provider	15-Feb-2013 7:58 AM	Health Partner	X	X	X	X				X		X
na.local.provider.baxter	16-Jan-2013 9:48 AM	Health Partner	X	X	X	X			X	X		
na.new.style.test	12-Feb-2013 10:05 AM	Health Partner	X	X	X	X			X	X		
na.newuserpasswordchangetest	29-Jan-2013 3:02 PM	Health Partner	X	X	X	X			X	X		
na.provider.team.admin	12-Feb-2013 10:08 AM	Health Partner									X	
OI.Provider.User	15-Feb-2013 2:58 PM	Health Partner	X	X	X	X			X			
SL.CENT	04-Jan-2013 9:10 AM	Health Partner	X	X	X	X			X	X	X	X
ST.Provider.HP.User	28-Dec-2012 1:18 PM	Health Partner		X	X	X						
Umer.Shah-Provider	18-Jan-2013 2:58 PM	Health Partner	X	X	X	X			X	X	X	X
Team: Central LHIN Baxter Order of Nurses-K										Total: 17		
User Name	Last Login Date	User Type	Client Viewer	Document Receiver	Document Sender	Document Viewer	Health Partner Administrator	Health Partner Support Administrator	Manual Invoice Subscriber	Offer Manager	Provider Team Administrator	Referral Manager
alireza.user	31-Jan-2013 11:42 AM	Health Partner		X	X	X						
cent.hpprovider.maribel	18-Feb-2013 12:29 PM	Health Partner	X			X			X	X	X	X
Fatima.Al-Zahra-Provider	21-Jan-2013 12:34 PM	Health Partner	X	X	X	X			X	X	X	X
Jessica.Provider	11-Jan-2013 1:35 PM	Health Partner	X	X	X	X				X		X
jorge.provider	15-Feb-2013 5:32 PM	Health Partner	X	X	X	X			X	X	X	X
kevin.provider	18-Feb-2013 10:48 AM	Health Partner	X	X	X	X			X	X	X	X
Confidential: This report contains personal health information and must be protected accordingly											1 of 2	

Continued on page 2:

HPG Active User Last Login Report												
14	4	2	of 2	100%	Find   Next							
naena.local.provider.baxter	16-Jan-2013 9:46 AM	Health Partner	X	X	X	X			X	X		
naena.new style test	12-Feb-2013 10:05 AM	Health Partner	X	X	X	X			X	X		
naena.newuserpasswordohangetest	29-Jan-2013 3:02 PM	Health Partner	X	X	X	X			X	X		
naena.provider team admin	12-Feb-2013 10:08 AM	Health Partner									X	
OI.Provider.User	15-Feb-2013 2:58 PM	Health Partner	X	X	X	X			X			
olga.cent.provider.User	14-Feb-2013 10:34 AM	Health Partner	X	X	X	X			X		X	
omar.provider	03-Jan-2013 11:57 AM	Health Partner	X	X	X	X			X	X	X	X
P2P.User	31-Jan-2013 2:55 PM	Health Partner		X	X	X						
ren.chen	16-Jan-2013 1:37 PM	Health Partner	X	X	X	X						
SL.CENT	04-Jan-2013 9:10 AM	Health Partner	X	X	X	X			X	X	X	X
Umer.Shah-Provider	18-Jan-2013 2:58 PM	Health Partner	X	X	X	X			X	X	X	X
<b>Team:Central LHIN: Home Medics - k</b>											<b>Total: 3</b>	
User Name	Last Login Date	User Type	Client Viewer	Document Receiver	Document Sender	Document Viewer	Health Partner Administrator	Health Partner Support Administrator	Manual Invoice Subscriber	Offer Manager	Provider Team Administrator	Referral Manager
EM.Vendor.User	12-Feb-2013 11:01 AM	Health Partner	X	X	X	X			X	X	X	X
jorge.provider	15-Feb-2013 5:32 PM	Health Partner	X	X	X	X			X	X	X	X
omar.provider	03-Jan-2013 11:57 AM	Health Partner	X	X	X	X			X	X	X	X
												<b>Grand Total: 33</b>

The top of the report will display the Search Criteria selected to generate the report; Organization, Filter Teams By, Last Login Date Range and the Teams selected:

HPG Active User Last Login Report		Run Date: 20-Feb-2013 08:52 PM EST
Organization:	Central LHIN	
Filter Teams By:	Managed Teams	
Last Login Date Range:	From 01-Sep-2012 12:00 AM to 20-Feb-2013 12:00 AM	
Teams:	Central LHIN : Bathurst nursing service, Central LHIN : Baxter Order of Nurses-K, Central LHIN : Home Medics - k	

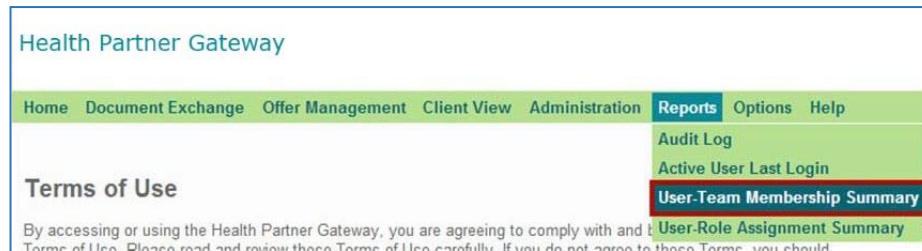
Beneath the header, each team is represented in a table containing User Names, Last Login Date, User Type and all of the roles assigned to each user.

Use the Report tools found at the top of the report to scroll forward and back between pages, to search for words, to export or print (see [Section 3.1.1](#)).

### 3.3 User-Team Membership Summary

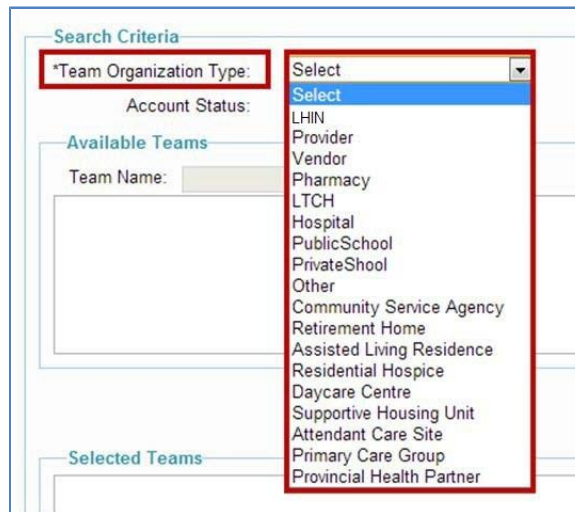
This report allows **Health Partner Administrators** to view a summary of user account membership to Teams.

From the Reports drop-down menu, select '**User-Team Membership Summary**':

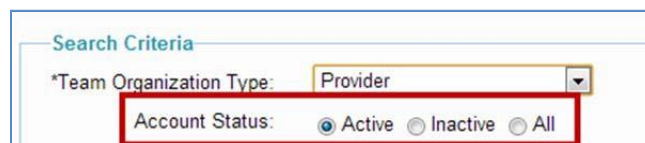


Use the Search Criteria fields to narrow down your report results:

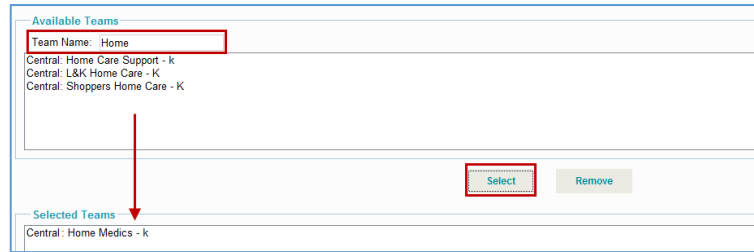
**Team Organization Type** - mandatory field that allows user to select the Team Organization Type (e.g. LHIN, Provider, Vendor, Pharmacy, Hospital, etc.):



**Account Status** – select Active, Inactive or All



Use the Team Name SLU search to find an Available Team to select and move to the 'Selected Teams' list by clicking on 'Select'.




Repeat the process if you want to add additional teams to the report.

Click 'Show Report' to generate the Team Membership Summary Report:

An example of how the report would look like (this is a LHIN view with multiple teams selected – the report categories and layout would be the same):

**HPG User - Team Membership Summary Report**

Run Date: 20-Feb-2013 10:17 PM EST

**HPG User - Team Membership Summary Report**

Team Owner Organization: **Central LHIN**  
 Team Organization Type: **Vendor**  
 Teams: **Central LHIN: Home Medics - k**  
 Account Status: **Active**

Team: Central LHIN: Home Medics - k Total: 11

User Name	First Name	Last Name	User Type	Account Status	Organization
CENTProvider.User	Max	Gromov	Health Partner	Active	Central
darlene.pat-provider	Darlene	Pat-Provider	Health Partner	Active	Central
EM.Provider.User	Eugene	Morozov	Health Partner	Active	Central
EM.Vendor.User	Eugene	Morozov	Health Partner	Active	Central
fiona.provider	Fiona	Provider	Health Partner	Active	Central
jorge.provider	Jorge	Provider	Health Partner	Active	Central
omar.provider	Omar	Provider	Health Partner	Active	Central
Prov1.Xml	Max	Gromov	System	Active	Central
PXML.CENT	Max	Gromov	System	Active	Central
role.test3	role	test3	Health Partner	Active	Central
wayne.provider	Wayne	Provider	Health Partner	Active	Central

Grand Total: 11  
Page 1 of 1

If more than one Team was selected, it would display beneath the first one:

Team: Central LHN: Happy Path - K						Total: 13
User Name	First Name	Last Name	User Type	Account Status	Organization	
CENTProvider.User	Max	Gromov	Health Partner	Active	Central	
dariene.pat-provider	Dariene	Pat-Provider	Health Partner	Active	Central	
EM.Provider.User	Eugene	Morozov	Health Partner	Active	Central	
EM.Vendor.User	Eugene	Morozov	Health Partner	Active	Central	
fiona.provider	Fiona	Provider	Health Partner	Active	Central	
inna.goldenbergCent	Inna	Goldenberg	Health Partner	Active	Central	
jorge.provider	Jorge	Provider	Health Partner	Active	Central	
olga.cent.provider.User	olga	CENT.Provider	Health Partner	Active	Central	
omar.provider	Omar	Provider	Health Partner	Active	Central	
Prov1.Xml	Max	Gromov	System	Active	Central	
PXML_CENT	Max	Gromov	System	Active	Central	
role.test3	role	test3	Health Partner	Active	Central	
wayne.provider	Wayne	Provider	Health Partner	Active	Central	

Team: Central LHN: Home Medics - k						Total: 11
User Name	First Name	Last Name	User Type	Account Status	Organization	
CENTProvider.User	Max	Gromov	Health Partner	Active	Central	
dariene.pat-provider	Dariene	Pat-Provider	Health Partner	Active	Central	
EM.Provider.User	Eugene	Morozov	Health Partner	Active	Central	
EM.Vendor.User	Eugene	Morozov	Health Partner	Active	Central	
fiona.provider	Fiona	Provider	Health Partner	Active	Central	
jorge.provider	Jorge	Provider	Health Partner	Active	Central	
omar.provider	Omar	Provider	Health Partner	Active	Central	
Prov1.Xml	Max	Gromov	System	Active	Central	
PXML_CENT	Max	Gromov	System	Active	Central	
role.test3	role	test3	Health Partner	Active	Central	
wayne.provider	Wayne	Provider	Health Partner	Active	Central	

Grand Total: 24

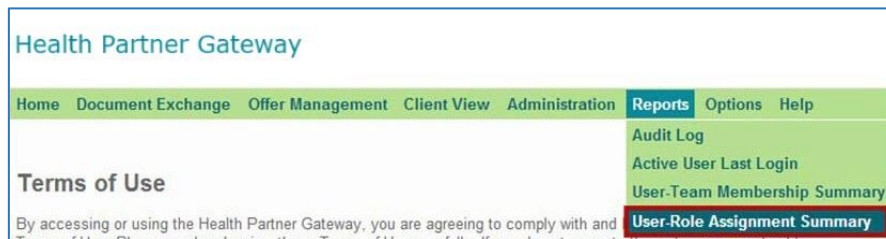
The report displays the User Name, First Name, Last Name, User Type (would be Health Partner only), Account Status (Active/Inactive) and the Organization the user account belongs to.

Use the Report tools found at the top of the report to scroll forward and back between pages, to search for words, to export or print (see [Section 3.1.1](#)).

### 3.4 User-Role Assignment Summary

This report allows **Health Partner Administrators** to view a summary of the user accounts that belong to their respective organizations and the functional role assignments of those users.

From the Reports drop-down menu, select **'User-Role Assignment Summary'**:



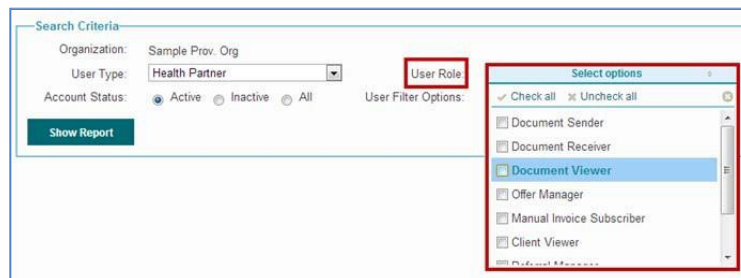
Use the Search Criteria fields to narrow down your report results:



**Organization** field – will display your PHPO  
**User Type** – Health Partner is the only option



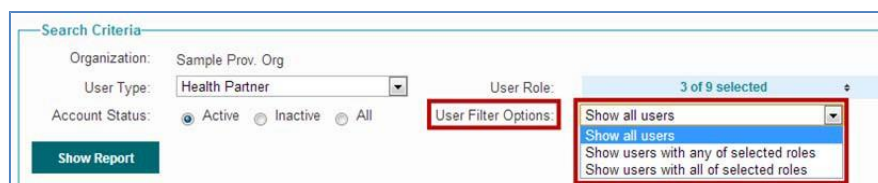
**User Role** – mandatory field requires user to specify one, multiple or all user roles; click on the **Select options** (blue bar) and the box will expand to display all available roles – use scroll bar to view all roles:



**Account Status** – Active, Inactive or All

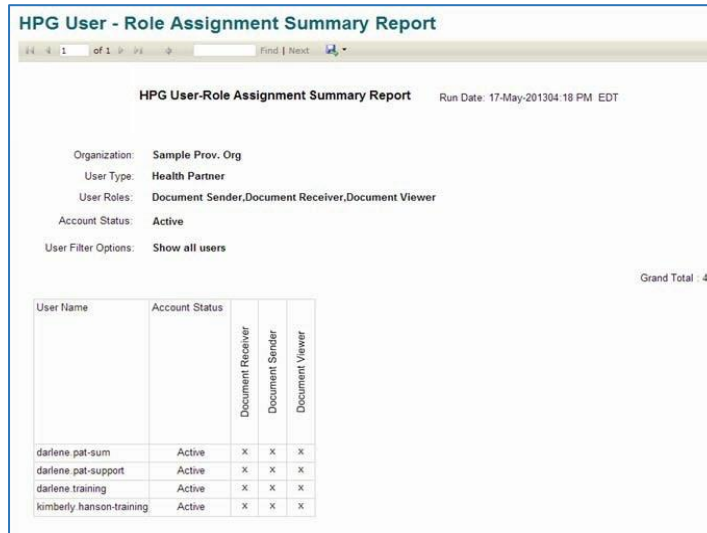


**User Filter Options** – options include: Show all users; Show users with any of selected roles; show users with all of selected roles:





Click on **Show Report** to generate the **User-Role Assignment Summary Report**:



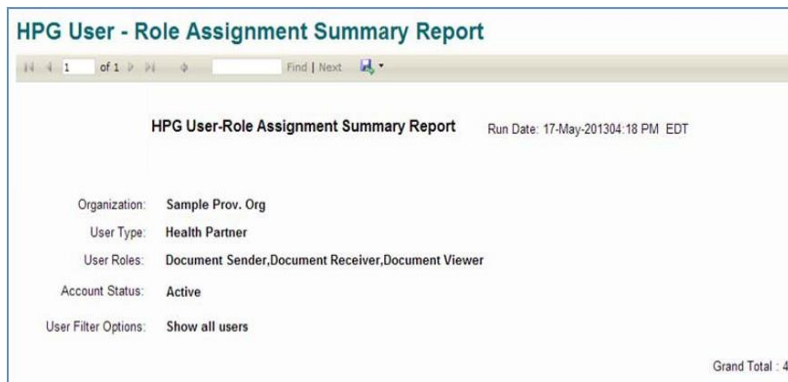
**HPG User - Role Assignment Summary Report** Run Date: 17-May-201304:18 PM EDT

Organization: Sample Prov. Org  
 User Type: Health Partner  
 User Roles: Document Sender, Document Receiver, Document Viewer  
 Account Status: Active  
 User Filter Options: Show all users

Grand Total : 4

User Name	Account Status	Document Receiver	Document Sender	Document Viewer
darlene.pat-sum	Active	x	x	x
darlene.pat-support	Active	x	x	x
darlene.training	Active	x	x	x
kimberly.hanson-training	Active	x	x	x

The top of the report will display the Search Criteria selected to generate the report; Organization, User Type, User Roles, Account Status and User Filter Options:



**HPG User - Role Assignment Summary Report** Run Date: 17-May-201304:18 PM EDT

Organization: Sample Prov. Org  
 User Type: Health Partner  
 User Roles: Document Sender, Document Receiver, Document Viewer  
 Account Status: Active  
 User Filter Options: Show all users

Grand Total : 4

The report includes the User Name, Account Status and the roles selected in the Search Criteria

User Name	Account Status	Document Receiver	Document Sender	Document Viewer
darlene.pat-sum	Active	x	x	x
darlene.pat-support	Active	x	x	x
darlene.training	Active	x	x	x
kimberly.hanson-training	Active	x	x	x