

Health Partner Gateway Reference Guide for Health Partners

Module 4 - Community Health Portal / Client View

June, 2026

Table Of Contents

Community Health Portal (CHP).....	3
Client Search.....	4
Information in the Community Health Portal.....	6
Details Tab (Client Summary).....	8
Shared Documents.....	10
Shared Notes	13
CSR Upload Documents	14
Coordinated Care Plan	20

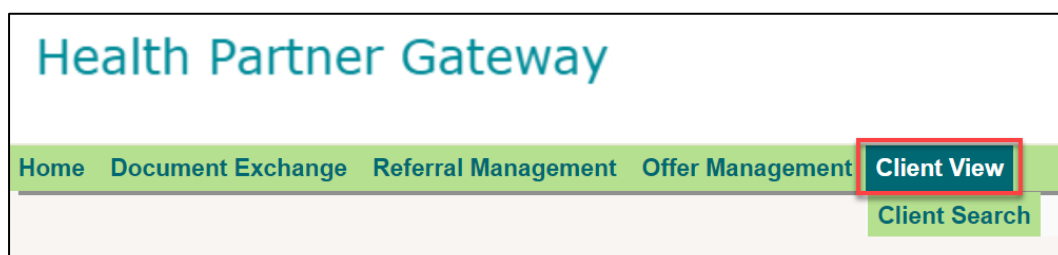
Community Health Portal (CHP)

The **Client View** tab, also referred to as the Community Health Portal (CHP), provides health partners such as service providers and hospitals with real time client information. The CHP uses the current Health Partner Gateway (HPG) and CHRIS integration to permit authorized Health Partner users to see real time active client information. HPG is integrated with CHRIS and related document management systems to enable more sophisticated methods of information sharing, including the access of client information through CHP and through Referral Management.

This document is intended for **Health Partners** that are actively providing service to clients under the care of Ontario Health at Home (OHaH, referred to in HPG by the former title, 'LHIN'). This document will address the following areas in HPG:

- Client View (aka CHP)
- Client Search
- Details
- Shared Documents
- Shared Notes
- Client Services Report (CSR) Upload Documents
- Outcome-Based Pathways (no longer being used)
- Coordinator Care Plan

Providers and Hospital HPG users must be assigned the **Client Viewer** role in HPG in order to access the CHP via the Client View:



The Client View (also known as CHP) provides the ability to search for a client by using search criteria and once in the context of a client's record, the users will have access to client's details, shared documents and assessments, selected notes, and CSR Upload Documents – depending on the organization type.

The components of the Client View tab include:

1. **Client Details:** includes viewable information contained in the Client Summary (in the Details tab)
2. **Shared Documents:** available only to Providers, all documents that have been selected for sharing by OHAH staff; within Shared Documents tab, **Shared Assessments** are also available to Providers & Hospitals (*includes interRAI CA and interRAI HC*)
3. **Shared Notes:** includes any client notes been selected for sharing by OHAH staff

4. **CSR Upload Documents:** the ability to upload client service related documents directly into the client's document library in CHRIS *(additional role assignments of Document Sender and Document Viewer must be granted to perform the functionalities in this tab)*
5. **Coordinated Care Plan:** displays information and care plan sharing among the interdisciplinary team or health care partners to enhance patient care



For Shared Documents and CSR Upload Documents, OHaH must have implemented Document Management System (DMS). The client information seen by provider and hospital users is slightly different.

Hospital users see:

- All Active Clients for OHAH (i.e., all clients with Admitted or Pending Referrals)
- No restricted access client information

Provider users see:

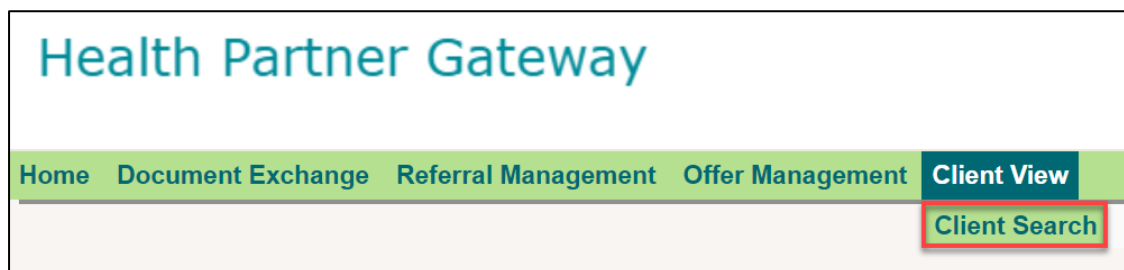
- Only Active clients who are assigned to the provider who is logged in
- Restricted access clients who are assigned to the logged in provider

The CHP is configured locally by OHaH which then grants privileges to the Provider and Hospital users who can view client information.

Client Search

Provider or Hospital users search for client information:

1. Select **Client Search** in the **Client View** tab:



2. HPG displays the Client Search page. Select the OHaH/LHIN* that is providing care to the client from the drop-down list (*Reminder: HPG currently uses the former 'LHIN' name for OHaH)



Provider users will only see LHINs that their HPG team provides service to. Hospital users can search all of OHaH.

3. Use one or both of the 'Search By' fields to find clients; available search parameters include:

- Surname
- Firstname
- Date of Birth (DOB)
- Health Card Number (HCN)
- Client Number
- Billing Reference Number (BRN)

It is generally recommended to search by HCN (which is a unique identifier).

4. Once the Search parameters are set, select the **Search** button:

The Community Health Portal presents a list of all the **Active** clients from that LHIN that meet the search criteria and the display varies depending on the type of user (Provider or Hospital).

5. Select the Client Name link from the list presented.

Client Search

Search Criteria

*Organization: Central East LHIN

*Search By: Surname anderson

First Name

Search Reset

Search Results

Name	HCN	DOB	Client Number
Anderson, Harold		25-Aug-1948	10055393

The Community Health Portal presents the client’s information.

Information in the Community Health Portal

The Community Health Portal is currently configured to share information between OHaH and providers, and between OHaH and hospitals. Each partner has a different view.

Information Viewed by Provider Users

Providers have access to Active clients currently assigned to this provider including Restricted Clients, information includes:

- Client Summary with displays in the Details Tab
- Shared Documents
- Shared Notes
- CSR Upload Documents
- Outcome-Based Pathways (no longer being used)
- Coordinated Care Plan

Organization: CE LHIN

Anderson, Harold (Lisa)
Client# 10050437
Status: Active

30 Scott St , Whitby, Ontario L1N 3L1
(905) 123-4567

Details
Shared Documents
Shared Notes
CSR Upload Documents
Outcome-Based Pathways
Coordinated Care Plan

Collapse All
Expand All
Refresh

Client Information

DOB: 01-May-1975 (47 yrs)
Gender: Male

Client Characteristics

interRAI CA 15-Mar-2022
Completion

! Discharged clients show in the search results for a specific time frame (time frame is set by OHaH in CHRIS under Sharing Authorizations), but no client information is displayed.

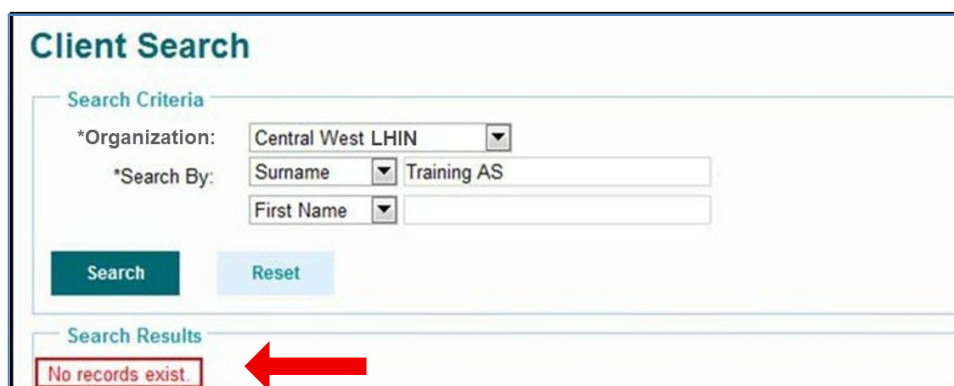
Information Viewed by Hospital Users

The Hospital user has access to all Active OHaH clients with one exception – restricted access clients are not displayed. Information includes:

- Details
- Shared Documents
- Shared Notes
- Coordinated Care Plan (when sharing authorization in CHRIS has been given by OHaH)

! Depending on how they're configured, Hospital users may also have Document Sharing capability, as Service Provider organizations do.

When the client file is closed and the status becomes inactive, the Hospital user can no longer see any of the patient's information using Client View:



The screenshot shows a 'Client Search' form. Under 'Search Criteria', there is a dropdown for '*Organization:' set to 'Central West LHIN'. Below it, '*Search By:' has two options: 'Surname' (selected) and 'First Name'. The 'Surname' field contains 'Training AS'. There are 'Search' and 'Reset' buttons. Below the search criteria, the 'Search Results' section displays a red box with the text 'No records exist.' A red arrow points to this message.

Update on Information in the CHP

The information in the Community Health Portal is updated as information is entered in CHRIS (real time). However, currently there is no notification when client information has changed in CHRIS and subsequently on the CHP. Service Providers can be notified of a change in client information by OHaH via Provider Notification.

Timeout for CHP

If the Provider or Hospital user does not change the view of Client Information in the CHP, HPG provides a timeout feature forcing the user to sign in again. The time frame for the timeout is 20 minutes.

Details Tab (Client Summary)

The default view when viewing client information is the **Details** tab. The information in the **Details** tab is the **Client Summary** view from the CHRIS Client level header. This information is presented in a view only mode (i.e., there is no hyperlink into CHRIS for further information).

All active client information entered in the CHRIS client's file displays in the appropriate section. If the active client has no information documented, the section contains the phrase, 'no information is available'. (Note: a client who has an Inactive Client File in CHRIS will be displayed for providers for a limited time based on the sharing authorization.)

Below is an example of the Details tab information:

Referral Type	Service Delivery Type	Initial Auth Date	Wait List Flag	Assigned Provider	Provider End Date	Current and Future Frequencies
Home Care	Nursing - Visit home	12-May-2022	No	WH - PARAMED HOME HEALTH SERVICE	25-May-2022	
Home Care	Occupational Therapy - Visit home	12-May-2022	No	WH - (CAR) Community Advantage Rehab (CENTRIC)	03-Aug-2022	
Home Care	Personal Support & Homemaking - Hourly combined	13-May-2022	Yes			

The default view expands **Client Information**, **Client Characteristics** and **Services** with the other sections displayed in collapsed mode.

To expand the sections displayed in collapsed mode:

- Click on the arrow beside the section or click anywhere on the title band



- Or click on **Expand All/Collapse All** at the top to open and close all sections within the Details tab



Client Information

This area displays demographics and address information:

Client Information	
DOB:	25-Aug-1948 (73 yrs)
Gender:	Male
HCN:	
Client Consent:	Active as of 02-Jun-2022
Preferred Language:	English
Present Location:	30 Scott St , Whitby, Ontario L1N 3L1

Client Characteristics

Includes Assessment results:

Client Characteristics			
interRAI HC	26-May-2022	MAPLe	4 out of 5 / High
Completion		Score:	
Date:			
Capacity for	Incapable		
Placement:			
Client in	--	Crisis	--
Crisis Start:		Reason:	

Services

Services						Details
Referral Type	Service Delivery Type	Initial Auth Date	Wait List Flag	Assigned Provider	Provider End Date	Current and Future Frequencies
Home Care	Nursing - Visit home	12-May-2022	No	WH - PARAMED HOME HEALTH SERVICE	25-May-2022	
Home Care	Occupational Therapy - Visit home	12-May-2022	No	WH - (CAR) Community Advantage Rehab (CENTRIC)	03-Aug-2022	
Home Care	Personal Support & Homemaking - Hourly combined	13-May-2022	Yes			

Other sections include (all display active information only):

- Personal Contacts
- Community Support and Other Resources
- Medical Contacts
- Primary Care Groups
- Risks
- Allergies
- Safety Issues
- Client Diagnoses
- Referrals
- Equipment Rentals
- Purchases (in the last 30 days)
- LTCH Choices and Bookings

Shared Documents

Documents in CHRIS that are shared with the Provider/Hospital are available to users to view in HPG within the CHP **Shared Documents** tab. HPG users can view shared documents from OHaH organizations that have implemented a document management system for storing and sharing documents.

Organization: CE LHIN		
Anderson, Harold (Lisa)	Client# 10050437	Status: Active
30 Scott St , Whitby, Ontario L1N 3L1	(905) 123-4567	
Details Shared Documents Shared Notes CSR Upload Documents Outcome-Based Pathways Coordinated Care Plan		

Shared Documents contains **Shared Assessments** and **Shared Documents**.



For hospital users, ability to view Shared Documents depends on how OHaH configured hospital access.

Details Shared Documents Shared Notes CSR Upload Documents Outcome-Based Pathways Coordinated Care Plan			
Refresh			
Shared Assessments			
Assessment Report		Report Date	
InterRAI Contact Assessment Report		15-Mar-2022	
InterRAI Home Care Personal Health Profile (PHP) Report		24-Jun-2021	
InterRAI Home Care Assessment Report		24-Jun-2021	
Page 1 of 1		5	
3 record(s) found			
Shared Documents			
Search Criteria			
From Date: 19-Jan-2021		To Date: 20-Oct-2022	
Category:		Time Zone: EDT	
Document Name:			
Search		Reset	
Category	Document Name	Document Date	Document Date
Referral In/Orders/MD Comm	Request for Assessment	11-May-2021	11-May-2021 3:10 PM
Page 1 of 1		5	
1 record(s) found			

Shared Assessments

The most recently completed Assessments are available to be reviewed for client's who have authorized Assessment Sharing with providers and hospitals. This includes, but is not limited to:

Shared	Assessment Tool
☒	interRAI Child and Youth Mental Health
☒	interRAI Child and Youth Mental Health Screener+
☒	interRAI Contact Assessment
☒	InterRAI Home Care
☒	interRAI Palliative Care Comprehensive
☒	interRAI Palliative Care Hospice

The Shared Assessments tab can be expanded or collapsed using the down arrow:

Details	Shared Documents	Shared Notes	CSR Upload Documents	Outcome-Based Pathways	Coordinated Care Plan
Refresh					
Shared Assessments					
Assessment Report			Report Date		
interRAI Contact Assessment Report			15-Mar-2022		
interRAI Home Care Personal Health Profile (PHP) Report			24-Jun-2021		
interRAI Home Care Assessment Report			24-Jun-2021		
Page 1 of 1			5		
3 record(s) found					

At the bottom of the Shared Assessment Report table, you can navigate through additional pages when more than three Assessment Reports are shared:

Page 1 of 1	5
-------------	---

Open the Shared Assessment Report by clicking on the Assessment Report link:

Details	Shared Documents	Shared Notes	CSR Upload Documents	Outcome-Based Pathways	Coordinated Care Plan
Refresh					
Shared Assessments					
Assessment Report			Report Date		
interRAI Contact Assessment Report			15-Mar-2022		
interRAI Home Care Personal Health Profile (PHP) Report			24-Jun-2021		
interRAI Home Care Assessment Report			24-Jun-2021		
Page 1 of 1			5		
3 record(s) found					

The assessment report opens in a new window in PDF format and can be reviewed/saved/printed if needed:

interRAI Contact Assessment (CA) Form

Name: Harold (Lisa) CE
Anderson

Health Card Number: 1
Date Printed: 2023/01/12
Case Record No: 12213

Assessment Reference Date: 2022 / 03 / 15
Signature of Assessor: Lisa Anderson

**interRAI Contact Assessment (CA)©
Canadian Version**

Screening Level Assessment for Emergency
Department and Intake From Community/Hospital

(CODE FOR LAST 24 HOURS
UNLESS OTHERWISE SPECIFIED)

Addressograph

Searching for Shared Documents

Shared Documents

Search Criteria

From Date: 11-Oct-2022 To Date: 12-Jan-2023 Time Zone: EST

Category:

Document Name:

Search Reset

The following Search Criteria can be used:

- **Date Range:** indicate the **From Date** and **To Date** to find shared documents that fall within the date range – a search can be done with date range only
- **Category:** enter the Document Category using the smart look up – an * can be used as a wildcard to view the categories:

Category

- Acquired Brain Injury
- Adult Day Program
- Assessments/Consults
- Behavioural Supports Ontario
- Business Continuity Package (BCP)
- CDI
- Consents
- Correspondence
- CPCNP
- Family Managed Home Care
- Health Links
- MHAN
- Placement
- Records Management
- Referral In/Orders/MD Comm

- **Document Name:** type in the Document Name if known

Click **Search**

To review a document, select the Document Name link:

Category	Document Name	Document Date	Upload Date
Referral In/Orders/MD Comm	Request for Assessment	20-Oct-2022	20-Oct-2022 1:29 PM

The document opens in a new window in PDF format and can be reviewed/saved/printed if needed.

Referral Package

When a Provider receives a Referral Package Notification after having accepted a Service Offer, the user would find the documents identified in the notification in the **Shared Documents** tab in the CHP.

Shared Notes

CHRIS client Notes can be shared with provider and hospital users if the OHaH user indicates this in CHRIS. Shared Notes are displayed in the **Shared Notes** tab:

Subject and Details	Note Type	Date Created	Author	Last Updated
Client Share Note with Provider., Note Created:12-Jan-2023 1:53 PM EST	Client Home Care Nursing	12-Jan-2023 EST	Anderson, Lisa	12-Jan-2023 1:53 PM EST



The most recent Note that has been labelled in CHRIS as Note Type 'Care Plan', that Note will also appear by default under the **Details** tab.

When no notes are shared, the provider/hospital user sees a message in the bottom right corner that states that **No Record Found**.

CSR Upload Documents

The CSR Upload functionality in HPG is made available only to Service Providers that are providing services to clients from one or more LHIN/OHaH (Purchase Services only).

Provider users must be assigned the roles of Document Sender (to upload documents), Document Viewer (to view the history of uploaded documents) and Client Viewer (if uploading documents from CHP).

The CSR Upload functionality allows Providers to upload documents directly into the client's document library in the Document Management System (DMS) through HPG. It supports the same document types for upload as DMS functionality.

In HPG, CSR Upload functionality is available in 2 areas:

1. **CSR Upload Documents** tab in the Community Health Portal (CHP)
2. Send Documents section of **Document Exchange** tab

A history of the uploaded documents is retained and a notification is created in CHRIS along with a confirmation message to the Provider. A system generated task is sent to the client's primary caseload advising of the document upload.

Providers are able to upload documents to any active client they are providing service for at the OHaH site that has implemented CSR Upload Enhancement. Each OHaH site has the ability to define how many days past service discharge that a Provider will have the ability to send documents against that service (setting determined in CHRIS Maintenance by Application Administrator). Once the number of days is past, the Provider users will no longer be able to send CSR Upload Documents to that service.

To upload, locate the client you are uploading documents for (steps to use Search function were described earlier in the document).

Select **CSR Upload Documents** Tab:

The screenshot displays the Health Partner Gateway (HPG) interface. At the top, the header includes the title "Health Partner Gateway" and user information: "User: lisa.anderson-steliz" and "Version 3.12.0.8206". A navigation bar contains links: Home, Document Exchange, Offer Management, Client View (highlighted with a red box), Invoice Entry, Administration, Reports, Options, and Help. Below the navigation bar, a section for "Organization: CE LHIN" displays client details for "Anderson, Harold (Lisa)" with Client# 10050437 and Status: Active. The address is "30 Scott St, Whitby, Ontario L1N 3L1" and the phone number is "(905) 123-4567". A tabbed interface below shows "Details", "Shared Documents", "Shared Notes", "CSR Upload Documents" (highlighted with a red box), "Outcome-Based Pathways", and "Coordinated Care Plan". Under the "CSR Upload Documents" tab, there are three expandable sections: "Send CSR Upload Document" (highlighted with a red box), "Search Criteria", and "Search Results".

In the Send CSR Upload Document complete the following fields:

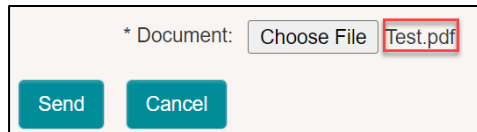
Service Delivery Type	Provider Assigned Date	Provider Discharged	Status
☒ Nursing - Visit nursing home	12-Jan-2023		Active
☐ Personal Support & Homemaking - Hourly Homemaking	14-Oct-2022		Active

- **From:** Default **From** Team will display the OHaH (displayed as 'LHIN') that is associated with the team followed by the Provider Team name. If the user belongs to only one Provider Team associated with the LHIN of the selected client, then the field is display only (no drop-down list). If the use belongs to more than one Provider Team that is associated with the LHIN of the selected client, then the field is a drop-down list and user must select the Provider Team.
- **Service Delivery Type:** Displays a list of service delivery types that the provider is currently providing (or has provided) to the client. The list includes services that the provider is:
 - Currently providing (active service)
 - No longer providing (discharged service) but the date of uploading the document falls within the # of days past service discharge window

This field is mandatory and the user may only select one option in this field. When an option is selected using the radio button, the **Provider Assigned Date** (or **Provider Discharge Date**, if applicable) as well as **Status** will be populated (either Active or Discharged).

- **Document Type:** Drop down list displays all document types available to the provider to send as a CSR Upload Document. Options displayed are the Document Types the OHaH site has created and indicated are available to the Provider to send CSR Upload Documents. The Document Types listed correspond to the OHaH of the client selected. The user may only select one option in this mandatory field.

- **Urgent:** Checkbox is available if this feature is turned on by OHaH. It is selected by the Provider User if the document being uploaded requires urgent attention.
- **Document:** Click **Choose File** to select the file you want to upload – once the document has been selected, the document name displays on the screen:



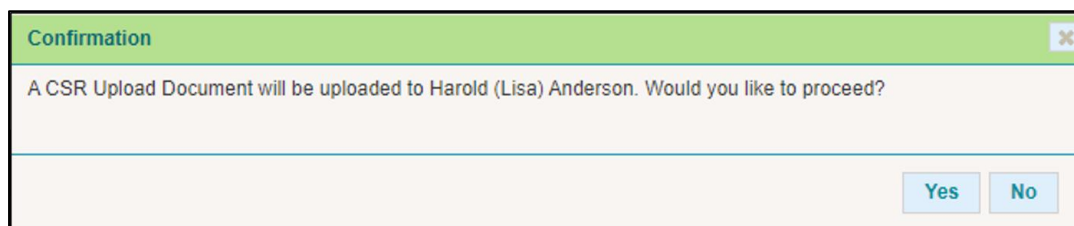
* Document: Choose File Test.pdf

Send Cancel

Click **Send**

Note: Only one document can be selected at a time and does not support the following document formats: .exe, .bat, .bin, .sql, .cmd

A Confirmation message will appear, click **Yes** to proceed:

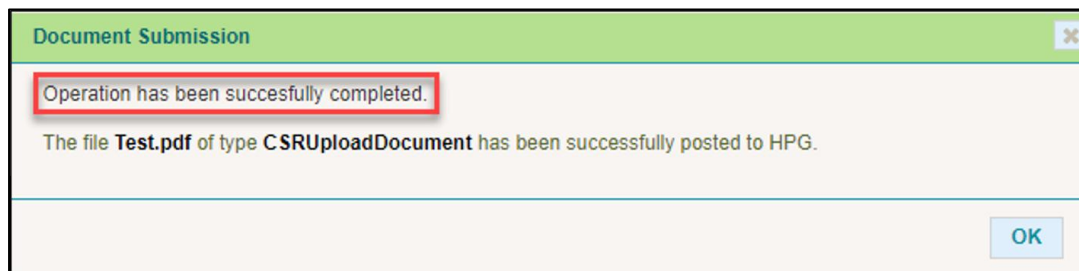


Confirmation

A CSR Upload Document will be uploaded to Harold (Lisa) Anderson. Would you like to proceed?

Yes No

A message that confirms that the document has been successfully uploaded or an error message to indicate an issue was encountered will appear. A successful upload does not address if it was successfully received in CHRIS.

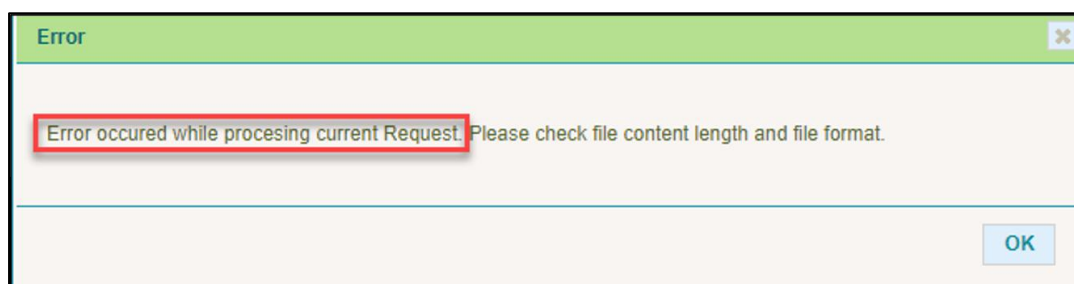


Document Submission

Operation has been successfully completed.

The file **Test.pdf** of type **CSRUploadDocument** has been successfully posted to HPG.

OK



Error

Error occured while procesing current Request. Please check file content length and file format.

OK

CSR Upload Document History

The CSR Upload Document History maintains a list of all the CSR documents that have been uploaded to DMS/CHRIS and is viewable from CSR Upload Documents tab. The Provider User must have Document Viewer role view the CSR Upload Document History in the CHP as well as in Document Exchange.

To view the document history, complete the following fields in the Document Search Criteria:

- **Document Set:** Select either Recent documents or Historical documents
- **From Team:** Default will display the OHaH site (displayed as 'LHIN') associated with the team followed by the Provider Team name. If the user belongs to only one Provider Team associated with the LHIN of the selected client, then the field is display only (no drop-down list). If the use belongs to more than one Provider Team that is associated with the LHIN of the selected client, then the field is a drop-down list and user must select the Provider Team.
- **From & To Date:** Can be used to set perimeters for your search and defaults to one week from current date. You can choose to use the Calendar widget to select the date you would like to enter in the field.

More information can be added to narrow your search:

- **Uploaded by:** type the first and last name of the Provider user who uploaded the document
- **Service Delivery Type:** select the appropriate type using the drop-down menu
- **Document Type:** select the appropriate type using the drop-down menu
- **Status:** select the appropriate option from the drop-down menu

Search Results

The **Recent CSR Upload Documents** search results displays the document records based on the document upload date/time – starting at the top of the grid with the most recent document uploaded and will only include those documents that have not yet been selected to be moved to the **Historical CSR Upload Documents** page.

Twenty (20) records will display at a time with paging.

Search Criteria

Document Search Criteria

Document Set: ☒ Recent documents ☐ Historical documents

From Team: SC SAINT ELIZABETH HEALTH CARE

From Date: To Date:

Uploaded by:

Service Delivery Type:

Document Type:

Status:

Search Reset

Search Results

Archive

☐ Submitted / Received ☐ Alert: Document Pending Review ☐ In Progress ☐ Reviewed

#	BRN	Client Name	Service Delivery Type	Document Type	Update Date/Time	Uploaded By	Actioned By	Actioned Date/Time	Status
1	610646178	Harold (Lisa) Anderson	Visit home	Nursing Interim	12-Jan-2023 3:02 PM EST	Lisa Anderson	Lisa Anderson	12-Jan-2023 3:05 PM EST	Reviewed
2	610646178	Harold (Lisa) Anderson	Visit home	Nursing Interim	12-Jan-2023 3:01 PM EST	Lisa Anderson	Lisa Anderson	12-Jan-2023 3:05 PM EST	In Progress
3	610646178	Harold (Lisa) Anderson	Visit home	Nursing Initial	12-Jan-2023 2:45 PM EST	Lisa Anderson			Received

Each document uploaded is identified on each line with the following attributes:

- Billing Reference Number (BRN)
- Client Name
- Service Delivery Type
- Document Type
- Upload Date/Time
- Uploaded By

The first six columns after the checkbox column refer HPG Provider side information collected during the CSR Upload process. The following 3 columns 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/Received (white)	Indicates that the document has been uploaded to HPG and saved in DocuShare. 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 the OHAH Administrator) and is pending review.
In Progress (yellow)	Indicates a document has been opened/viewed/processed and is in the process of being reviewed by OHAH.
Reviewed (green)	Indicates that the OHAH CHRIS user has completed their reviewed and marked the document as 'reviewed' in CHRIS.

The list can be sorted by clicking on any of the column headers (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**.

Select the check box to select the document and click the **Archive** button to move the document into the historical documents:

Search Results										
Archive		☐ Submitted / Received ☐ Alert: Document Pending Review ☐ In Progress ☒ Reviewed								
#	BRN	Client Name	Service Delivery Type	Document Type	Update Date/Time	Uploaded By	Actioned By	Actioned Date/time	Status	
1	610646178	Harold (Lisa) Anderson	Visit home	Nursing Interim	12-Jan-2023 3:02 PM EST	Lisa Anderson	Lisa Anderson	12-Jan-2023 3:05 PM EST	Reviewed	☒



If accessing a **Recent document** upload or **Historical document** from within a client profile in CHP, the corresponding document list will be limited to those that have been uploaded for that specific client. In Document Exchange, the list includes ALL clients that have been uploaded from HPG, both recent and historical.

To search for the Historical CSR Upload Documents, select the corresponding radial button and complete any of the fields to narrow your search:

Search Criteria										
Document Search Criteria										
Document Set: ☐ Recent documents ☒ Historical documents										
From Team: SC SAINT ELIZABETH HEALTH CARE										
From Date: 05-Jan-2023 To Date: 12-Jan-2023										
Uploaded by:										
Service Delivery Type: -All-										
Document Type: -All-										
Status: Reviewed										
Search Reset										
Search Results										
#	BRN	Client Name	Service Delivery Type	Document Type	Update Date/Time	Uploaded By	Actioned By	Actioned Date/time	Status	
1	610646178	Harold (Lisa) Anderson	Visit home	Nursing Interim	12-Jan-2023 3:02 PM EST	Lisa Anderson	Lisa Anderson	12-Jan-2023 3:05 PM EST	Reviewed	☐

Coordinated Care Plan

The Coordinated Care Plan (CCP) facilitates the sharing of care plan details across health care partners. With the appropriate permissions enabled through CHRIS, Health Partners using HPG can start a new care plan or view, update, or print an existing care plan.

For a Health Partner to have access to the coordinated care plan, the patient must be active in CHRIS. The level of access is set through CHRIS by the managing organization:

View: can read a patient's care plan

Edit: can make changes to an existing care plan that is **In Progress**

Add: can create a new care plan for a patient using the **Add Care Plan** button.

A care plan can only be added when there are no other care plans in progress.

When a user has navigated to a patient chart within HPG, the user is able to locate the Coordinated Care Plans when clicking on the Coordinated Care Plan tab.

Details	Shared Documents	Shared Notes	CSR Upload Documents	Outcome-Based Pathways	Coordinated Care Plan
Coordinated Care Plan List - Client Care Plan HNHB-110331 (v2.0)					

If there is only one Coordinated Plan available, it will automatically be displayed open. When there are multiple care plans available, a Coordinated Care Plan List hyperlink will display. Click the list hyperlink to view a list of all available care plans. Select the desired care plan by **Document Number** to view a specific care plan.

Home

Document Exchange

Referral Management

Offer Management

Client View

Invoice Entry

Administration

Reports

Options

Help

Organization: HNHB

Blaise, Palmer

Client# 10034745

Status: Active

#200-130 Bloor St W, Toronto, Ontario M5S 1N5

(416) 750-1720

Details

Shared Documents

Shared Notes

CSR Upload Documents

Outcome-Based Pathways

Coordinated Care Plan

Coordinated Care Plans

Add Care Plan

Document Number	Status	Updated Date	Updated By	Created Date	Created By
HNHB-110331 (v2.0)	In Progress	21-Feb-2019 06:01:53 PM	HPGIQA@nhb.reg	21-Feb-2019 05:30:12 PM	HPGIQA@nhb.reg
HNHB-110304 (v2.0)	Completed	21 Feb 2019 05:19:09 PM	Nsiah Yeboah,Akos	13 Dec 2018 10:27:00 AM	Nsiah Yeboah,Akos

Status

- **In Progress:** The current, active care plan
- **Complete:** The care plan has been marked as complete and can be printed, saved, or shared
- **Completed Revised:** Changes have been made to a completed care plan
- **Strike Out:** The care plan has been **Struck Out** and is no longer viewable e.g., if added in error

The Coordinated Care Plan is comprised of 3 parts:

1. **Document Details:** when the care plan was created and by whom, the document number and coordinated care plan status
2. **Care Plan Navigation with Section Links:** hyperlinks to specific sections within the care plan
3. **Care Plan Sections:** organized by topic, the parts of the care plan used to view or update information

The screenshot displays the 'Coordinated Care Plan' interface. At the top, a navigation bar includes tabs for 'Details', 'Shared Documents', 'Shared Notes', 'CSR Upload Documents', 'Outcome-Based Pathways', and 'Coordinated Care Plan'. The 'Coordinated Care Plan' tab is active.

Document Details (Part 1): A red box highlights the top section containing the following information:

- Coordinated Care Plan List > Client Care Plan HNHB-110304 (v2.0)**
- Document Number:** HNHB-110304 (v2.0)
- Created:** 13-Dec-2018 10:27:50 AM
- Updated:** 16-Jan-2019 01:20:11 PM
- Status:** In Progress
- Created By:** Nsiah-Yeboah, Akos
- Updated By:** Nsiah-Yeboah, Akos

Care Plan Navigation with Section Links (Part 2): A red box highlights a list of 13 sections:

- 1. My Identifiers
- 2. What's Most Important To Me and My Concerns
- 3. My Care Team
- 4. Health Care Consent and Advance Care Planning
- 5. My Health
- 6. More About me
- 7. My Goals and Action Plan
- 8. My Medication Coordination
- 9. My Allergies
- 10. Appendix 1 - My Medication List
- 11. Appendix 2 - My Health Assessments
- 12. Appendix 3 - My Most Recent Hospital Visit
- 13. Appendix 4 - Palliative Approach to Care

Care Plan Sections (Part 3): A red box highlights the 'My Identifiers' section, which includes a table of personal information:

My Identifiers		Update Section	
Last updated:	17-Dec-2018 09:23:57 AM	Last updated by:	HPG/QA/nhb.reg (Smoketest Provider (DO NOT USE))
Given Name:	Palmer	Health Card #:	Not Available: No HC No. Available
Preferred Name:	Palmer	Issued By:	--
Surname:	Blaise	Date of Birth:	16-May-1950
Address:	130 Bloor St W, #200	Gender:	Female
City:	Toronto	Preferred pronoun:	--
Province:	ON	Ancestry/culture:	--
Postal Code:	M5S 1N5	Identify as First Nation, Métis, or Inuit? :	No
Telephone number:	Home: (416)750-1720	If "yes," specify which nation:	--
Alternate Telephone number:	--	Communication accommodations :	None
Language of comfort:	English		

At the bottom left of the 'My Identifiers' section, there is a link: [Back to top](#).

When the care plan is open, the top of the care plan will display the following **Document Details**:

- **Document Number:** a unique reference number assigned to each care plan
- **Status:** the state or current status of the care plan
- **Created Date & Created By:** shows the date and the name of the user who created the plan
- **Updated & Updated By:** shows when the plan was last updated and by whom
- **The Generate PDF Button** is used to print or save the care plan

Coordinated Care Plan List > Client Care Plan HNHB-110304 (v2.0)

Coordinated Care Plan

Document Number: HNHB-110304 (v2.0) Created: 13-Dec-2018 10:27:50 AM Updated: 22-Feb-2019 12:42:24 PM

Status: Completed Created By: [redacted] Updated By: HPG\QAhhnb.reg

Care Plan Document Audit Log [Generate PDF](#)

Care Plan Navigation

Scroll up and down, or use **Section Links** to quickly navigate to view or edit specific a specific **Care Plan Section**.

A Back to top button is available in each section to quickly return to the section links at the top.

1. My Identifiers	8. My Medication Coordination
2. What's Most Important To Me and My Concerns	9. My Allergies
3. My Care Team	10. Appendix 1 - My Medication List
4. Health Care Consent and Advance Care Planning	11. Appendix 2 - My Health Assessments
5. My Health	12. Appendix 3 - My Most Recent Hospital Visit
6. More About me	13. Appendix 4 - Palliative Approach to Care
7. My Goals and Action Plan	

My Care Team (Include active family/caregivers, providers)

Last updated: 16-Jan-2019 01:11:34 PM Last updated by:

Coordinating Lead (notify if patient is hospitalized)		Name: --	Phone Number: --		Share Coordinated Care Plan	Coordinating Lead
Name of Team Member	Role	Organization	Primary Number	Secondary Number		
Liese Smith	Care Coordinator	HNHB LHIN	--	--	Yes	☐

[Back to top](#)

Editing a Care Plan

With Add and Edit permissions enabled, health partners using HPG can edit/update a care plan when the status is **In Progress** (i.e., active). Changes made either in HPG or in CHRIS are visible in both systems in real time.

To edit a care plan:

1. Click on a **Section Link**
(Care plan will scroll to that section)
2. Click the **Update Section** button
3. Update the section as needed
4. Click **Save Care Plan** to save changes

1. My Identifiers	8. My Medication Coordination
2. What's Most Important To Me and My Concerns	9. My Allergies
3. My Care Team	10. Appendix 1 - My Medication List
4. Health Care Consent and Advance Care Planning	11. Appendix 2 - My Health Assessments
5. My Health	12. Appendix 3 - My Most Recent Hospital Visit
6. More About me	13. Appendix 4 - Palliative Approach to Care
7. My Goals and Action Plan	

My Health (Include physical health, mental health and addictions [i.e. smoking], functional issues, assistive devices) Update Section

Last updated: 21-Feb-2019 06:01:54 PM Last updated by: HPG\QAhhnb.reg Cancel Changes Clear Form

Issues	Details (onset, considerations)
Knee Injury	injured knee from fall on stairs, July 17, 2019

⬆ Back to top Save Care Plan

You can undo section changes made using the **Cancel Changes** or the **Clear Form** buttons.

Thirty (30) minutes after the last change is made a Task notification will be triggered in CHRIS to the Care Coordinator at the managing organization.

Adding a Care Plan

To create a new care plan, click on the **Add Care Plan** button at the top of the screen.

 The **Add Care Plan** button will appear faded and cannot be used if there is a care plan **In Progress**.

Details Shared Documents Shared Notes CSR Upload Documents Outcome-Based Pathways **Coordinated Care Plan**

Add Care Plan

Coordinated Care Plans

Document Number	Status	Updated Date	Updated By	Created Date	Created By
HNHB-110331 (v2.0)	Completed	21-Feb-2019 06:01:53 PM	HPG\QAhhnb.reg	21-Feb-2019 05:30:12 PM	HPG\QAhhnb.reg
HNHB-110304 (v2.0)	Completed	21 Feb 2019 05:19:09 PM	Nsiah Yeboah,Akos	13 Dec 2018 10:27:50 AM	Nsiah Yeboah,Akos

When a new care plan is created in HPG, some sections (i.e., My Identifiers, My Care Team) have information auto-populated from CHRIS. Care plans initiated in HPG are visible in CHRIS and to health partners sharing the Coordinated Care Plan in HPG. Update the new care plan following the same steps as described above.

Copying & Completing Care Plans

To indicate that all care plan sections have been updated, or when a new care plan should be added in addition to the current one in progress, use the **Complete Care Plan** button to save all information and change the status to **Completed**.

Details Shared Documents **Shared Notes** CSR Upload Documents Outcome-Based Pathways **Coordinated Care Plan**

[Coordinated Care Plan List](#) > Client Care Plan CENT-100142 (v2.0)

Coordinated Care Plan

Document Number: CENT-100142 (v2.0) Created: 28-Jul-2019 01:29:55 PM Updated: 28-Jul-2019 01:29:55 PM

Status: In Progress Created By: HPG\mark.boucher.StElizabeth Updated By: HPG\mark.boucher.StElizabeth

Care Plan Document Audit Log

☐ 1. [My Identifiers](#)

☐ 2. [What's Most Important To Me and My Concerns](#)

☐ 3. [My Care Team](#)

☐ 4. [Health Care Consent and Advance Care Planning](#)

☐ 5. [My Health](#)

☐ 6. [More About me](#)

☐ 7. [My Goals and Action Plan](#)

☐ 8. [My Medication Coordination](#)

☐ 9. [My Allergies](#)

☐ 10. [Appendix 1 - My Medication List](#)

☐ 11. [Appendix 2 - My Health Assessments](#)

☐ 12. [Appendix 3 - My Most Recent Hospital Visit](#)

☐ 13. [Appendix 4 - Palliative Approach to Care](#)

Copy Latest Completed **Complete Care Plan** Generate PDF



The Coordinated Care Plan serves as a dynamic document accommodating regular review and updates to the patient's health status and plan of care. Updates can still be made to a care plan with a status of **Completed**, but when future edits are made, the status will change to **Completed Revised**.

When creating a new care plan, you have the option to copy the last completed plan details into to the new plan. This can minimize retyping when much of the information remains the same as the previous care plan.

Copy Latest Completed button is used to overwrite a care plan that is **In Progress** with information from the last completed care plan.

Editing a Completed Care Plan

1. Select the most recent **Completed** care plan from the Care Plan List
2. Navigate to the sections requiring revision
3. Use the **Update Section** button to make Changes
4. Click the **Save Care Plan** button to save the updates
5. Provide a **Revision Reason** after saving (optional)
6. Click OK

Strike Out Feature

If a care plan is added in error (e.g., to the wrong patient record) the information can be removed from the care plan using the **Strike Out** feature. To have a care plan struck out, contact the health partner organization that manages the Coordinated Care Plan through CHRIS.

- When a plan has been **Struck Out**:
- It will appear on the Coordinated Care Plan list with a line through all the fields
- The status will display as **Struck Out**
- The care plan cannot be opened to view

Details	Shared Documents	Shared Notes	CSR Upload Documents	Outcome-Based Pathways	Coordinated Care Plan
Coordinated Care Plans					Add Care Plan
Document Number	Status	Updated Date	Updated By	Created By	
HNHB-110334 (v2.0)	Struck Out	24-Feb-2019 09:12:06 PM	HPG\QA\hnb.reg	HPG\QA\hnb.reg	
HNHB-110331 (v2.0)	Completed	24-Feb-2019 09:11:49 PM	HPG\QA\hnb.reg	HPG\QA\hnb.reg	
HNHB-110304 (v2.0)	Completed-Revised	24-Feb-2019 05:27:17 PM	HPG\QA\hnb.reg	Nsiah-Yeboah Akos	



The **Strike Out** can be reversed by contacting the health partner organization that manages the Coordinated Care Plan through CHRIS. When a **Strike Out** is reversed, the care plan returns to its former status and will appear in the Coordinated Care Plan List to be viewed and edited as needed.

Audit Log

Changes made to a care plan are captured and displayed in the Audit Log, including what updates were made, when, and by whom. The following events are captured in the Audit Log:

- When a new care plan is created using the **Add Care Plan** button
- When a care plan section is opened by using the **Update Section** button
- Saving a section of the care plan, by using the **Save Care Plan** button
- When a PDF Report is generated by using the **Generate PDF** button
- When a care plan is completed by using the **Complete Care Plan** button

Care Plan Document

Audit Log

Date	User	Event	New Care Plan Status	Reason Note
28-Jul-2019 01:29:41 PM	HPG\mark.boucher.STElizabeth (ST.ELIZABETH HEALTH CARE)	Completed	Completed	In Progress
28-Jul-2019 01:29:34 PM	HPG\mark.boucher.STElizabeth (ST.ELIZABETH HEALTH CARE)	Viewed	In Progress	Care Plan Viewed
28-Jul-2019 11:30:50 AM	HPG\mark.boucher.STElizabeth (ST.ELIZABETH HEALTH CARE)	Viewed	In Progress	Care Plan Viewed
28-Jul-2019 11:29:54 AM	HPG\mark.boucher.STElizabeth (ST.ELIZABETH HEALTH CARE)	Viewed	In Progress	Care Plan Viewed
26-Jul-2019 10:29:25 AM	HPG\reena.tabing.STElizabeth (ST.ELIZABETH HEALTH CARE)	PDF Report Generated	In Progress	--