



CHRIS 1.3.3/HPG 2.1.7 Release Notes (for Vendors & Providers) v0.04

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Revision History

Version	Author	Reviewed	Description	Date
0.01	LVJ		First Draft	2010.01.08
0.02	LVJ	MLS	Review updates	2010.01.11
0.03	LVJ	AQB, JFS, NPR, YMJ, MLS	Modifications and updates	2010.02.10
0.04	LVJ	MLS	Modifications and updates	2010.04.13

* Items in red have been added, since the posting of the official Release Notes (v0.03);

** Items in green have been modified, since the posting of the official Release Notes (v0.03);

*** Items in purple and stricken out have been removed since the posting of the official Release Notes (v0.03)-

INTRODUCTION

This document provides specific information on Enhancements and Defect Resolution items relating to Vendors and Providers, included in CHRIS Release 1.3.3 and HPG Release 2.1.7.

ENHANCEMENTS

Client 'On Hold' Efficiencies

The Client 'On Hold' functionality enhancements will enable a user to place a client 'On Hold' with a future start date. In addition, when placing a client 'On Hold', the system will display all active Provider assignments and enable the user to select Provider assignment frequencies that need to be removed. Users will also have the option to send notifications to selected Providers from the 'On Hold' screen. These notifications will contain the Frequency Change Report as well as the actual notification, containing the client's name and the 'On Hold' start and estimated end dates.

On Hold events with a future start date will have a new status – 'Pending On Hold'.

To manage billings during the client on hold period, a new billing edit check - ONHOLD will be implemented with the following 3 options:

- **Ignore** If there are frequencies available, the visit is paid.
If not, the system ignores this edit check and proceeds to the next edit check in the sequence;
- **Suspend** If there are frequencies available, any visits billed during the 'On Hold' period are suspended. CS staff are required to review the suspended visits and determine if those frequencies should be paid or rejected. If no frequencies are available, these visits are suspended by the the USEDUP edit check;
- **Reject** Any visits billed during the 'On Hold' period are rejected.

A message will be displayed to alert the user if there are any active equipment items or pending supply items, as of the specified 'Start Date', when placing a client 'On Hold'.

The user will be required to manually adjust frequencies, if the Estimated End Date is either backdated or extended.

When placing a client off hold, the user will have the option to select the 'On Hold' location as the client's Present Location, upon saving.

If the user does not specify the 'On Hold' location to be the client's 'Present Location' upon saving, he/she will be navigated to the 'Change Present Location' screen. If the 'On Hold' reason is 'Vacation' or 'Other', the user will be navigated to the Client Overview screen.

Enhancement List

The following is a list of all enhancements relating to Vendors and Providers that are included in this release:

CQ #	SMA #	Description
38293	121700 – CE 153095 – HNHB 154081 – HNHB 121395 – CE 194033 – CE 209364 – SE 163759 – CE 167893 – OACCAC	<p><i>Client Management – Client ‘On Hold’ Efficiencies and Enhancements</i></p> <ul style="list-style-type: none"> • Users are now able to delete frequencies and notify Providers for selected assignments, when placing a client ‘On Hold’; • The system now allows the ‘On Hold’ Start Date to be in the future; • When removing a client’s ‘On Hold’ status, the user is navigated to the Client Overview page, if the ‘On Hold’ reason is ‘Vacation’ or ‘Other’; • If the reason is ‘Hospital’, the user has the option to make the ‘On Hold’ location the client’s ‘Present Location’, otherwise he/she is navigated to the Change Present Location screen; • If backdating or extending the ‘On Hold’ Estimated End Date, a reminder message is displayed to the user to update frequencies and notify Providers; • The system displays a message to the user, if the ‘On Hold’ date range overlaps with a booked short stay referral; • A manual task is also generated, to remind the user to review pending ‘On Holds’; • A new edit check (ONHOLD) has been implemented, to help CCAC’s manage billing during the client’s ‘On Hold’ period. <p>For more details, see the Client ‘On Hold’ Efficiencies section, on page 2 of this document.</p>
41840		<p><i>Client Management – Service Offer Response – Provider Assignment Records Created for Each Treatment Location</i></p> <p>When an offer is accepted, CHRIS usually creates only one assignment record for each active Provider.</p> <p>It now compares the service treatment locations and if they are different for the same Provider, a second active Provider assignment record is created.</p>

<p>43265</p>	<p><i>Finance – Line Items/Requisition/Purchase Order (PO) Details Enhancements</i></p> <ul style="list-style-type: none"> • The system now filters ‘Master Item Codes’ that are associated with at least one ‘Vendor Item Code’, for Vendor contracts where the ‘Order Stop Date’ at the contract level is less than the system date; • Entering ‘Order Stop Dates’ that are less than the system date, at the contract level, controls the filtering of geographic areas and Vendor contracts displayed on the ordering screens when the related master items get selected; • The following have been appended to the ‘Delivery Priority’ drop-down list: <ul style="list-style-type: none"> ○ Regular (default); ○ Immediate; ○ Individually Scheduled; ○ CCAC Rate 1; ○ CCAC Rate 2; ○ CCAC Rate 3; ○ CCAC Rate 4.
<p>42334</p> <p>143636—NSM 233548—ESC 202841—CE 202280—CE 233226—CE 137197—HNHB 203571—SE</p>	<p><i>Purchase Services – Modifications to the Service Referral Report</i></p> <ul style="list-style-type: none"> • The ‘Treatment Address’ is the Service Treatment Address at the time of the acceptance of the offer. This address is displayed in the Provider header. The phone number and directions from this address are also displayed in this report; • No longer displays inactive practitioner information; • Added active allergies to the Service Referral (and Report); • Added active safety issues to the Service Referral (and Report), if the local CCAC requests it to be shown, in the maintenance area of CHRIS. <p>These changes to the Service Referral report will not be available through Provincial XML until the release of CHRIS 1.3.4.</p>
<p>42335</p> <p>135742—NSM 233548—ESC 202280—CE 135659—OACCAC</p>	<p><i>Purchase Services – Modifications to the Frequency Change Report</i></p> <ul style="list-style-type: none"> • The ‘Treatment Address’ is now the ‘Service Treatment Location’ displayed in the Provider header; • Add active allergies to the Frequency Change (and Report); • Added active safety issues to the Frequency Change (and Report), if the local CCAC requests it to be shown, in the maintenance area of CHRIS. <p>These changes to the Frequency Change report will not be available through Provincial XML until the release of CHRIS 1.3.4.</p>

42342 232412 – NSM
 203571 – SE
 236895 – NE
 268695 – ESC

Purchase Services – Modifications to the Service Offer Report

- All grey areas in the report are now a lighter shade;
- The 'Treatment Address' is now the 'Service Treatment Location' from the 'Service Authorization', at the time that the offer is sent;
- Add active allergies to the Service Offer (and Report);
- Added active safety issues to the Service Offer (and Report), if the local CCAC requests it to be shown, in the maintenance area of CHRIS.

These changes to the Service Offers report will not available through Provincial XML until the release of CHRIS 1.3.4.

42109 235583 – WW

Inbox and Sentbox Enhancement

Functionality has been added to allow the user to filter the HPG Inbox and Sentbox, by 'Document Type', 'From Team' and 'To Team'.

The ability to search by 'From User' has also been removed.

DEFECT RESOLUTION

The following is a list of defects relating to Vendors and Providers that have been resolved in this release:

CQ #	SMA #	Description & Resolution
38681	242179 – HNHB 242124 – HNHB	<p><i>Purchase Services – Service Offer Could Be Modified Even After Being Sent</i></p> <p>If an offer was modified after it was already sent to the Provider, the changes would still be applied and displayed in the Offer Details Screen.</p> <p><i>Fixed as follows:</i></p> <p>The system will not update the details once the offer has been created.</p>
41244	249923 – ESC	<p><i>HPG Audit Log Report Cannot be Exported to Microsoft Excel</i></p> <p>Trying to export the Audit Log Report to Excel would generate a timeout error.</p> <p><i>Fixed as follows:</i></p> <p>The issue has been fixed.</p> <p>Also, due to the volume of data involved and to make the report function more quickly, the ALL option has been removed from Organization/CCAC and Event/Action.</p>
41395		<p><i>'SAF Type' Field Validation Issues</i></p> <p>If the 'SAF Type' field did not contain a numeric value, HPG would post and process the file successfully. The file was not visible however, in CHRIS.</p> <p>Also, if the 'SAF Type' field contained a numeric value other than 3 or 4, HPG would post and process the file successfully. The file would then fail in CHRIS and could only be deleted by the CCAC. Also, the entire file would fail if a single line had an invalid value.</p> <p><i>Fixed as follows:</i></p> <p>The 'SAF Type' in Equipment & Supply Billing (Line Item level only) is now validated as a whole number and only 3 and 4 are acceptable values. Anything else will fail.</p>
41663		<p><i>Send Document Screen – 'Technical Error' When Sending an E&S Billing File to a Provider Instead of a Vendor and Vice-Versa</i></p> <p>If, by accident, the user would try to send an Equipment and Supply invoice to a Provider, an error message would appear stating that the Purchase Services file is wrong, which is the correct behavior. Changing a Vendor without leaving the screen and trying to send the billing file again however, would generate a 'Technical Error' and crash the system.</p> <p>The opposite is also true when trying to send Purchase Services invoice to a Vendor instead of a Provider.</p> <p><i>Fixed as follows:</i></p> <p>The issue has been fixed.</p>

45788 283463 – CE ***Billing File With Zero Detail Lines Allowed for Submittal***
An invoice file with no line items was allowed to be submitted. It should have been considered as invalid by HPG validation.
Fixed as follows:
The issue has been fixed.
