



CHRIS/HPG User Guide

March 2024

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What is CHRIS/HPG?

The Health Partner Gateway (HPG) provides a single electronic solution to securely exchange health information between Ontario's home healthcare agencies and their partners.

See the [Feature Overview](#) video for additional information.

And end to end User Guide on how to use and operate the CHRIS/HPG module can be found [here](#).

What are the benefits of Chris HPG V2?

Agencies using CHRIS/HPG Billing V2 can now expect the following:

- Optimized workflow that aligns with a unified billing vision for **future improvements**
- The ability to **generate, send, reconcile, resubmit, and export** invoice
- The ability to perform **bulk actions** on all tasks, saving time on repetitive tasks
- Improved **performance** and workflow **efficiency** over V1
- Improved error management, **exportable grids**, and more

CHRIS/HPG Videos in ACU Foundations and AlayaCare University

Review the **videos** on CHRIS/HPG Billing in [ACU Foundations](#) to gain an understanding of the workflow.

Additional tools, such as recaps and quizzes can be found in [AlayaCare University](#).

Community Ideas Board

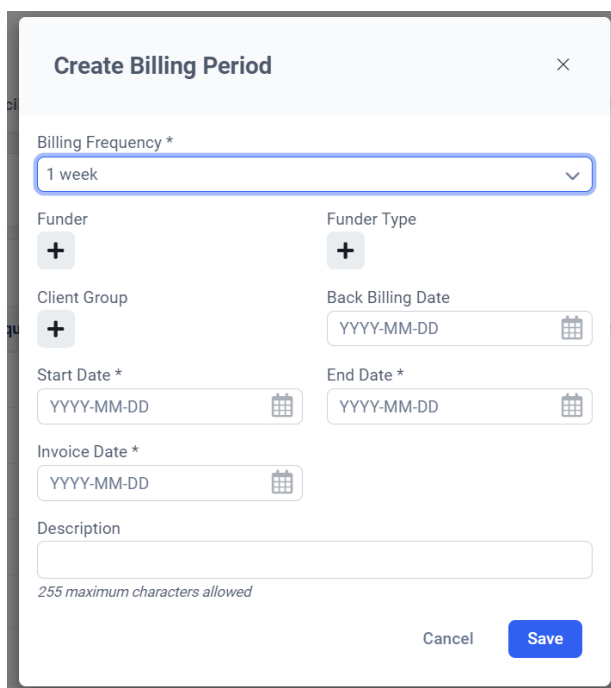
Have ideas on how to improve this feature? Post them on the [Community Ideas Board](#).

CHRIS/HPG Workflow

Step 1. Billing Period Creation

A **billing period** is used to capture visits within a **date range**. To help your agencies organize those invoices, **filters** can be applied when creating billing period. For example, filtering for all, or specific HCCSS funded visits will help separate those invoices from your private pay clients.

When creating a Billing Period:



The screenshot shows a 'Create Billing Period' form with the following fields and controls:

- Billing Frequency ***: A dropdown menu currently set to '1 week'.
- Funder**: A button with a '+' sign to add a funder.
- Funder Type**: A button with a '+' sign to add a funder type.
- Client Group**: A button with a '+' sign to add a client group.
- Back Billing Date**: A date input field with a calendar icon, showing the format 'YYYY-MM-DD'.
- Start Date ***: A date input field with a calendar icon, showing the format 'YYYY-MM-DD'.
- End Date ***: A date input field with a calendar icon, showing the format 'YYYY-MM-DD'.
- Invoice Date ***: A date input field with a calendar icon, showing the format 'YYYY-MM-DD'.
- Description**: A text input field with a placeholder and a note below it: '255 maximum characters allowed'.
- Buttons**: 'Cancel' and 'Save' buttons at the bottom right.

Billing Frequency will determine how often your agency bills. For example, if your agency processes invoices weekly, select "1 week". It is important to ensure that this billing frequency matches the billing frequency that is set up at the **client's service level**.

Select any desired **Funder**, **Funder Type**, and **Client Group** filters for this bill period. Filters can be very helpful if your agency would like to run different billing period of the same billing frequency.

The **Back Billing Date** is a threshold of how many back dated visits, visits that were missed in previous billing runs, can be pulled into this current billing period. If the Back Billing Date is not selected, it will automatically be set to 6-months before the billing period's end date.

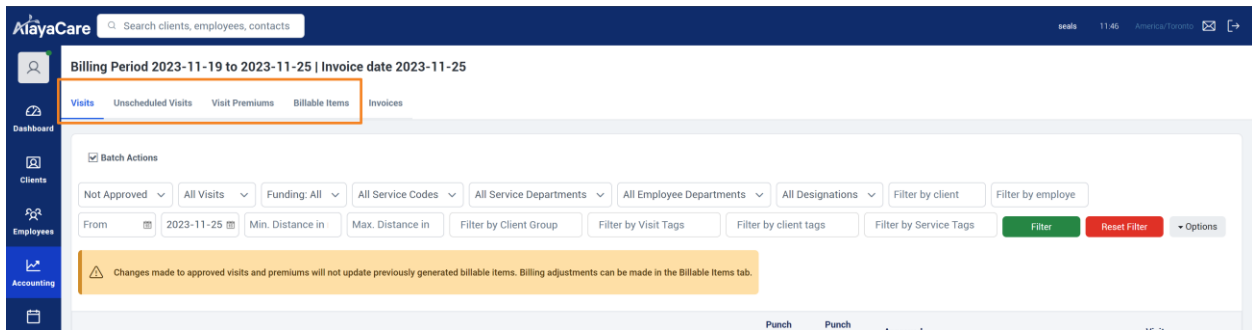
The **Start Date** is the start date of the billing period. It will be automatically pre-populated with the date after the end of the previous billing period of the same billing frequency.

The **End Date** is the end date of the period. This date can be adjusted so that agencies that use a 'bi-monthly' billing cycle can modify the end date when it should be changed between the 15th or 16th of a month. *Please note that the end date is inclusive.*

The **Invoice Date** is the date that will appear on the invoice. As well, as the date that the transaction will be posted in your subledger.

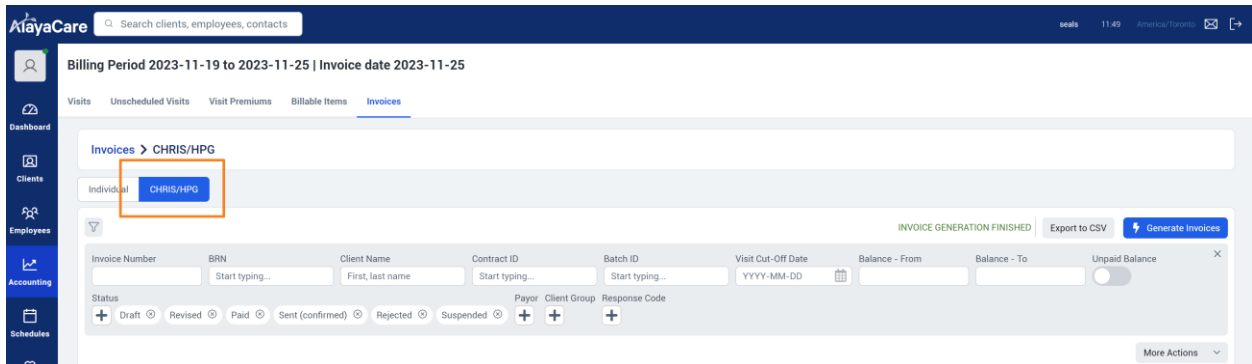
Step 2. Review Visits, Unscheduled Visits, Visit Premiums, and Billable Items

After creating the Billing Period, the **Visits**, **Unscheduled Visits**, **Visit Premiums**, and **Billable Items** tabs can be reviewed. Reviewing these tabs are specific to different agencies.



When ready, the **invoices** for this Bill Period can be **generated**.

In the Invoices tab, be sure to select the **CHRIS/HPG** market toggle.



Billable Items Management (BIM)

After visits have been approved, utilize Billable Items Management (BIM) to ensure that the visits contain the HCCSSS required data. BIM can confirm that the **BRN, Service Type Code, Activity Code, and Bill Code** are recorded within the Visit.

The screenshot shows the Accounting software interface. The main navigation bar includes Billing, Reconciliation, Expense Reconciliation, Payroll, Payment, Bill-to Parties, Accounting Exports, and Accounting Settings. The current page is 'Billing > Billable Item Management'. On the left sidebar, there are options for Billable Item Management, Invoices, Billing Cycle, Billing Period, and Funder Summary. The main content area shows a table of billable items with columns for Billable Item ID, Source Type - ID, Source Date, Service/Premium Code, Billing Frequency, BRN, Client Name, and Activity Codes. A table with one entry is visible: Billable Item ID 7376, Source Type - ID Visit - 763, Source Date 2023-05-27 02:00, Service/Premium Code TC: Nursing - TC: Nursing, Billing Frequency 1 week, BRN 580202147, Client Name Clark Bauer, and Activity Codes Assessment. Above the table, there are buttons for 'Error Log' (highlighted with an orange box), 'Download as CSV', 'Generate', and '+ Add Billable Item'. There are also filters for dates (2023-05-24 to 2023-05-31) and a 'Ready' status indicator.

The screenshot shows the 'Error Log' dialog box. It contains the following text: 'Error log from last billable item generation'. Below this, there are two error messages: 'There was a problem generating the following billable items. Follow the suggested resolution to generate successfully.' and 'Once errors have been resolved, generate billable items to remove errors from log.' Below the messages, there is a filter for the date 2023-05-01 and an 'Export to CSV' button. A table with two entries is shown:

Source Type - ID	Client Name	Service date	Error description	Suggested resolution
Visit - 762	Gina Mcgrath	2023-05-25	Missing client service required field(s)	Add activity code to the client service
Visit - 764	Odessa Hoppe	2023-05-25	Missing client service required field(s)	Add activity code to the client service

At the bottom, it shows '1 - 2 of 2 entries' and a page size of 10.

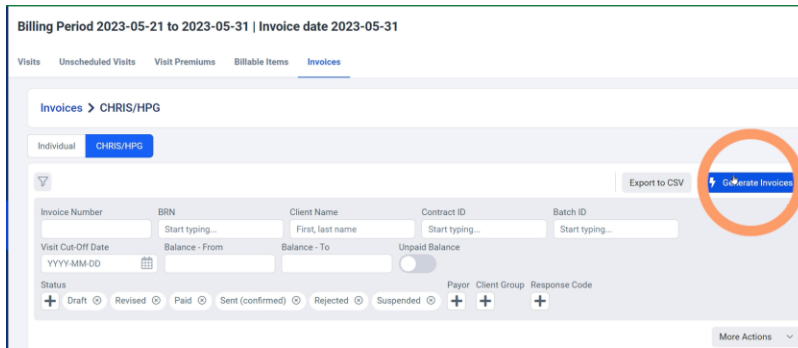
Using BIM, the **On-hold** status can also be utilized and prevent specific visits from being invoiced. This will help your agency control which visits are sent to CHRIS, at any given time.

The screenshot shows the Accounting software interface, similar to the first screenshot. The main navigation bar and sidebar are the same. The main content area shows the same table of billable items. Above the table, there are buttons for 'Set to On-hold' and 'Set to Ready' (both highlighted with an orange box), 'Regenerate', and '+ Add Billable Item'. There are also filters for dates (2023-05-24 to 2023-05-31) and a 'Ready' status indicator. The table shows one entry: Billable Item ID 7376, Source Type - ID Visit - 763, Source Date 2023-05-27 02:00, Service/Premium Code TC: Nursing - TC: Nursing, Billing Frequency 1 week, BRN 580202147, Client Name Clark Bauer, and Activity Codes Assessment. At the bottom, it shows '1-1 of 1 entries' and a page size of 10.

After the visits have been validated and all data is included, you will be able to **create** the invoices.

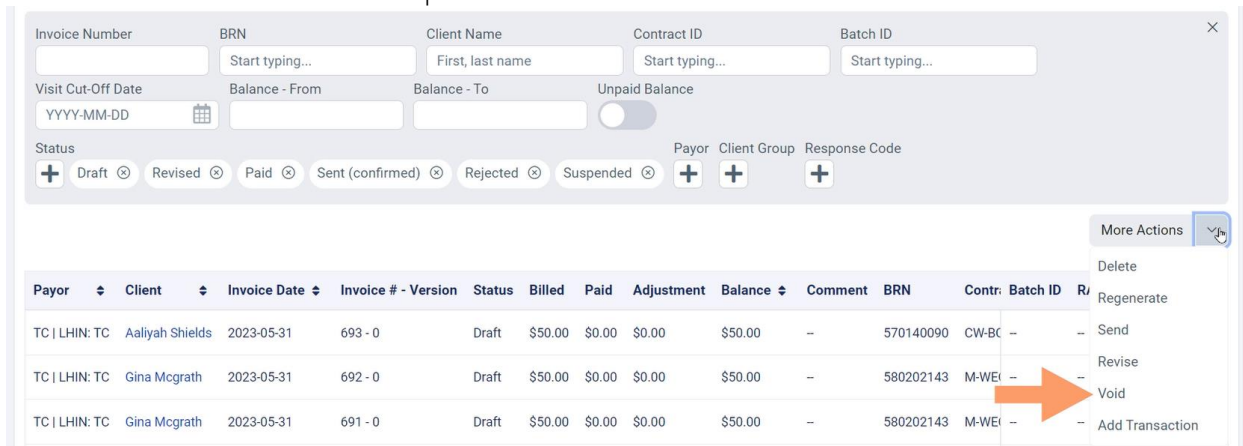
Step 4. Invoice Generation

To generate the invoices, click **Generate Invoices**.



Newly generated invoices are always in **draft** status. This means that they are ready to be sent to HPG.

Click on the **'More Action'** dropdown for additional actions.



Deleting an invoice could be helpful if your agency has a different team managing invoices for different groups of HCCSS or clients, and this billing period includes LHINs or clients of a different group. Only invoices in 'Draft' status can be deleted.

Regenerate is used to update invoice information. This is helpful if you are doing a pre-billing check.

Send will allow you to select all or specific visits to send to HCCSS.

Revise is used after HCCSS reconciliation and feedback has been provided, revisions made, and invoices for the revisions are ready to be generated.

Voiding invoices that have been sent in error can be reversed by using the void function. For visits with invoices that have been voided, they will need to have their invoices generated again.

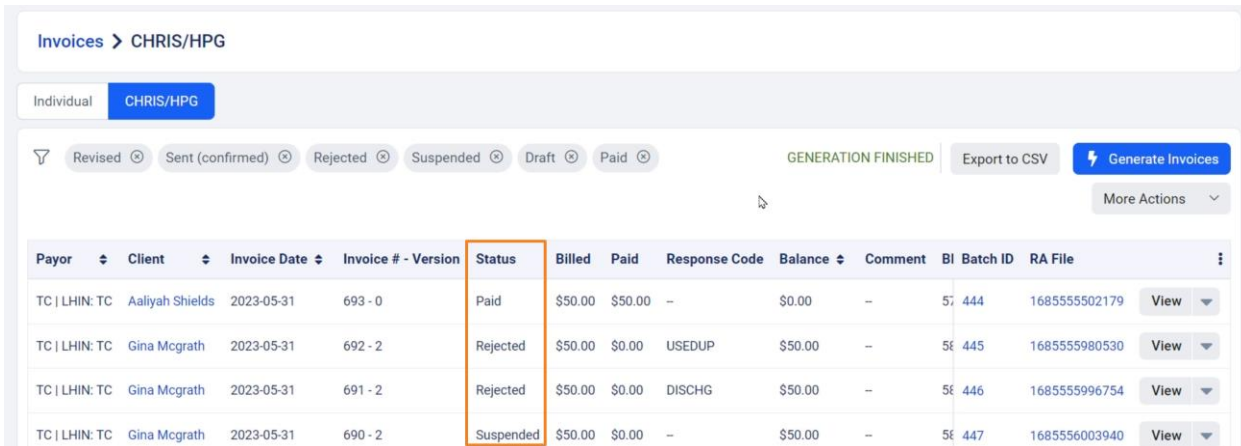
At this point, review the draft invoices, ensuring that they are correct and that the visits have bill codes, activity codes, and service codes. **Send** the desired invoices to the HCCSS.

Step 5. Reconciliation, Revision, and Resubmission

After the HCCSS has received the invoice batch and completed their review, their responses will be **sent back** through **AlayaCare**.

Located in the **same** Invoices page of the Billing period, we can see that visits will have HCCSS statuses, such as **paid**, **suspended**, and **rejected**, in the status column.

Additionally, the Response Code column will display any response codes that the HCCSS has attached to a **suspended** or **rejected** visit.

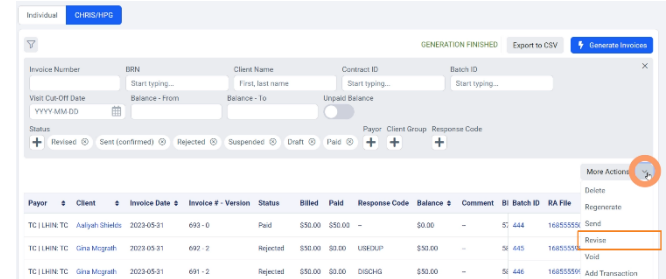


Payor	Client	Invoice Date	Invoice # - Version	Status	Billed	Paid	Response Code	Balance	Comment	BI Batch ID	RA File	
TC LHIN: TC	Aaliyah Shields	2023-05-31	693 - 0	Paid	\$50.00	\$50.00	-	\$0.00	-	56 444	1685555502179	View
TC LHIN: TC	Gina McGrath	2023-05-31	692 - 2	Rejected	\$50.00	\$0.00	USEDUP	\$50.00	-	56 445	1685555980530	View
TC LHIN: TC	Gina McGrath	2023-05-31	691 - 2	Rejected	\$50.00	\$0.00	DISCHG	\$50.00	-	56 446	1685555996754	View
TC LHIN: TC	Gina McGrath	2023-05-31	690 - 2	Suspended	\$50.00	\$0.00	-	\$50.00	-	56 447	1685556003940	View

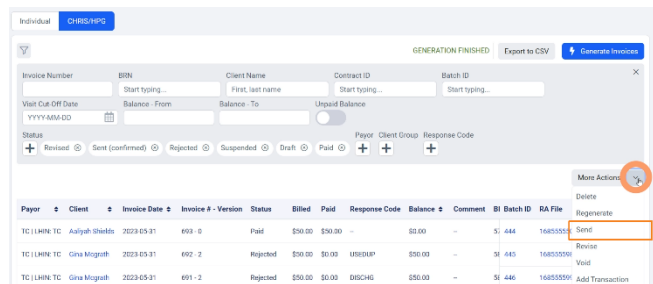
At this point, you will be able to **revise the visit details**, as per the HCCSS's feedback.

Some common revision scenarios include a change in the **BRN**, **Updating the service type code**, **updating a visit's activity code**, or perhaps even **'no revision'**, as the HCCSS is contacted, and a change is made on their end.

Update the visit or client service, as per the HCCSS's request, and you will be able to mark the selected visits as **revised**.



When ready, the revised visits can be **sent** to the HCCSS again, for review.



Voiding

Voiding an invoice will **reverse all transactions**, including **allocations**, that were previously recorded against a previously **sent** invoice. The voided invoice will no longer be valid and so, the associated visits to that invoice will need to generate to a new invoice, with a new invoice number, or they can be written off, if required.

Writing-off Invoices

For invoices sent to CHRIS-HPG with **outstanding balances** that the agency no longer expects to collect, they can be **'written-off'**.

To help identify only invoices with only outstanding balances, select the **"Unpaid Balances"** toggle. Only invoices in **"paid"**, **"rejected"**, or **"suspended"** status can be written off.

Invoices > CHRIS/HPG

Individual CHRIS/HPG

INVOICE GENERATION FINISHED Export to CSV Generate Invoices

Invoice Number BRN Client Name Contract ID Batch ID Visit Cut-Off Date Balance - From Balance - To

Unpaid Balance Status Draft Revised Sent (confirmed) Voided Paid Deleted Rejected Suspended Payor Client Group Response Code

More Actions

Payor	Client	Invoice Date	Invoice # - Version	Status	Billed	Paid	Adjustment	Balance	Comment	BRN	Contract ID	Visit Date	Respon	Batch ID	RA File
Champlain - CHRIS/HPG Champlain	Emmet Hoeger	2023-08-26	901 - 1	Paid	\$10.00	\$5.00	\$0.00	\$5.00	-	1234	12345	2023-08-20	-	511	1692996995964
Champlain - CHRIS/HPG Champlain	Emmet Hoeger	2023-08-26	903 - 1	Paid	\$10.00	\$5.00	\$0.00	\$5.00	-	1234	12345	2023-08-22	-	511	1692997002454
CHRIS/HPG Mississauga Halton	Hermann Rippin	2023-08-26	868 - 3	Paid	\$10.00	\$5.00	\$0.00	\$5.00	-	2574235	24356234562	2023-08-13	-	512	1692997007408

1-3 of 3 entries Per page: 10

Batch management

Batch management allows users to **view** batches across different billing periods, access invoices within a batch, and **export** batches into various formats.

The definition of a batch is the grouping of all invoices that were sent to the same LHIN or HPG funder, up to a limit of **8,000 invoices per funder**. For funders with over 8,000 invoices, AlayaCare will create multiple batches.

The **“balance”, “billed”, “payments”, and “adjustments”** column will display the financial details for the batch. As well, you can easily see any outstanding payments for a batch, where you can follow-up if needed. To quickly see visits with an unpaid balance, select the **Batch ID** to see all visits and then select the **“unpaid balance”** toggle.

The last column on the list is the export function. This will allow you to export all the invoices within the batch to an available **export**.

Accounting

Billing LHIN Reconciliation Expense Reconciliation Payroll Payment Bill-to Parties Accounting Exports Accounting Settings

Billing > Batch Management

Batch ID	Total Items	Payor	Sent Date	Sent By	Balance	Billed	Payments	Adjustments	Export
509	2	CHRIS/HPG South East	2023-08-25 13:39	Administrator	\$20.00	\$20.00	\$0.00	\$0.00	Export
508	1	CHRIS/HPG Central West	2023-08-25 13:39	Administrator	\$10.00	\$10.00	\$0.00	\$0.00	Export
507	7	CHRIS/HPG - WEST CHRIS/HPG - WEST	2023-08-25 13:39	Administrator	\$70.00	\$70.00	\$0.00	\$0.00	Export
506	2	North Simcoe Muskoka CHRIS/HPG North Simcoe Muskoka	2023-08-25 13:39	Administrator	\$20.00	\$20.00	\$0.00	\$0.00	Export