



CHRIS/HPG Transition 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**

Time to go-live

For your agency to successfully transition to CHRIS/HPG billing, **testing** and **validation** will be required. To help prepare your agency prepare, these are some specific tasks, owners, and time expectations for this transition:

Tasks	Time (hrs)	User	Where
Reviewing User Guide Assets	3	Super User, Billing Specialist	Zendesk, Community, Assets
Reviewing Billing V2 Learning Plan	2	Super User, Billing Specialist	ACU, ACUFoundations
Reviewing CHRIS/HPG Learning Plan	2	Super User, Billing Specialist	ACU, ACUFoundations
Testing in UAT	5	Super User, Billing Specialist	UAT Environment

What are the Differences Between CHRIS/HPG V1 and V2?

Below are improvements that we have made to CHRIS/HPG Billing.

Functionality	CHRIS/HPG V1	CHRIS/HPG V2
Pre-Billing Checks		
Billable Items Management	✗	✓
Issue Resolutions / Issue Log	✗	✓
Creating a Pilling Period		
Creating Billing Cycles / Period	✓	✓
Billing Period Filters	✓	✓
Billing Cycle Tabs		
<ul style="list-style-type: none"> • Visits 		* Pre-Billing checks will replace these tabs' functionality
<ul style="list-style-type: none"> • Unscheduled Visits 	✓	
<ul style="list-style-type: none"> • Visit Premiums 		
<ul style="list-style-type: none"> • Issue Resolution 		
Invoice Generation and Sending		
Invoice Generation	✓	✓
Invoice Custom Batches	✗	✓
Invoice Sending – HPG Integration	✓	✓
View the Billing File PXML	✗	✓
Invoice Management Bulk Options		
Export Grid to CSV	✗	✓
Filtering the Selection for Bulk Actions	✗	✓
Bulk Sending to Multiple HCCSS	✗	✓
Bulk Regenerate Invoices	✗	✓
Bulk Delete Invoices	✗	✓
Bulk Revise	✗	✓
Bulk Void	✗	✓
Transaction Types		
Automatic Payment from RA File	✓	✓
Write Off	✓	✓
Manual Payment	✗	✗
Credit Note	✗	✗
Debit Note	✗	✗
Aggregate Export	✓	✓
Accounting Exports	✓	✓

Items in Progress

Please note that the following non-core HCCSS workflows are not presently available in CHRIS/HPG Billing.

- Custom file name
- Visit/Invoice history view
- Invoice export
- Dedicated reconciliation screen

While they should not impact your workflows, please reach out to your AlayaCare representative if you have any question.

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](#).

Transition Process

After deciding that your agency would like to transition to the new CHRIS/HPG module, please follow the testing steps below.

Step 1: Read User Guide

Before getting started, take this time to understand the new workflow for CHRIS/HPG billing by downloading and reading through this [CHRIS/HPG Billing User Guide](#).

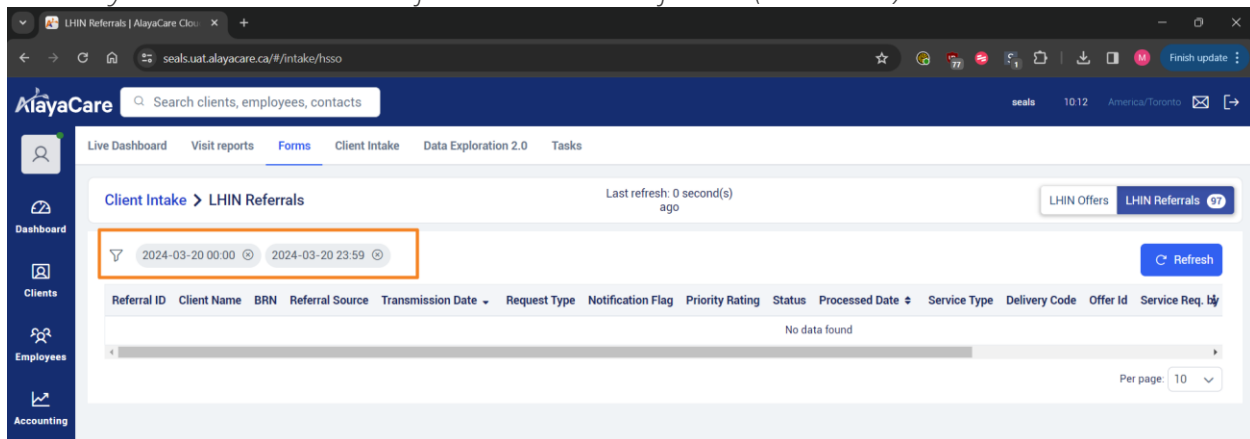
Step 2: Testing in UAT

UAT Referrals

For testing purposes, referrals will be created in your UAT environment. Using these referrals, you will be able to create test clients and further test the new features and workflows.

Test referrals can be accessed by in the Client Intake > LHIN Referral module.

You may need to edit the date filters to see the referrals (See below).



The screenshot shows the AlayaCare web interface. The main content area is titled "Client Intake > LHIN Referrals". At the top right of this section, it says "Last refresh: 0 second(s) ago" and "LHIN Offers LHIN Referrals 97". Below this, there are two date filters: "2024-03-20 00:00" and "2024-03-20 23:59", both with circular refresh icons. A "Refresh" button is located to the right of the filters. Below the filters is a table with the following columns: Referral ID, Client Name, BRN, Referral Source, Transmission Date, Request Type, Notification Flag, Priority Rating, Status, Processed Date, Service Type, Delivery Code, Offer Id, and Service Req. The table currently displays "No data found". At the bottom right of the table area, there is a "Per page: 10" dropdown menu. The left sidebar contains navigation icons for Dashboard, Clients, Employees, and Accounting.

Use these referrals to create new test clients. When creating Client Services, be sure to include the Billing Frequency. Please see the [Billing Period Introduction](#) video to review Billing Frequencies.

Creating and Approving Visits

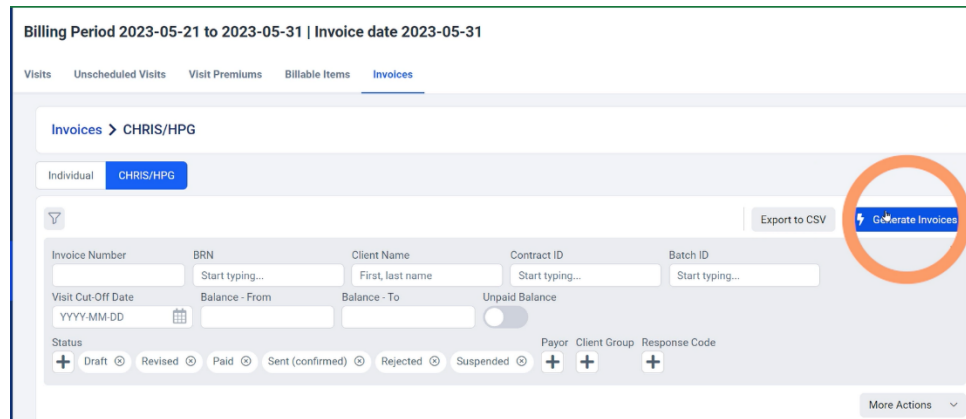
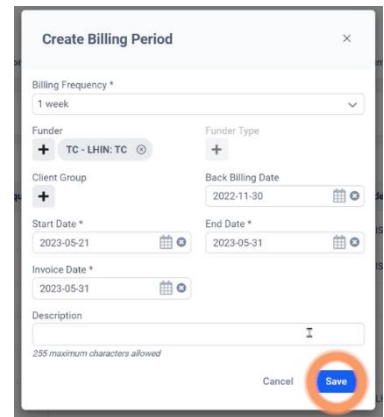
The workflow for creating and approving visits remains unchanged.

Creating a Billing Period, Invoices, and Sending Invoices

Next, create the **Billing Period**, Invoices, and submit to HPG. [Please see this video to review the new billing workflow.](#)

When creating a **Billing Period**:

1. Set the date range of visits
2. Select the billing frequency
3. Select a back billing date, if desired
4. Filter by Funder, Funder Type, or Client Group.
5. Select CHRIS/HPG Market.
6. Generate Invoices



Additional features include the introduction of **Billing Periods**, **Billable Items**, **Billable Items - Error Logs**, and **Billable Items - Statuses**.

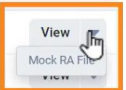
After the invoices have been marked as sent a new UAT feature will allow your agency to test **Reconciliation**, **Revisions**, and **Resubmissions**.

Reconciliation, Revisions, and Resubmissions

Using the **Mock RA** tool, available only in your UAT environment, you will be able to **mimic reconciliations** from HCCSS. This will allow you to test all the subsequent workflows, including revisions and resubmissions.

[Please watch this video to see the new Reconciliation, Revisions, and Resubmissions workflows.](#)

[Please watch this video to review how the Mock RA tool can help your agency test the new workflows.](#)

Payor	Client	Invoice Date	Invoice # - Version	Status	Billed	Paid	Adjustment	Balance	Batch ID	RA File	
CHRIS/HPG - WEST CHRIS/HPG - WEST	Odessa Hoppe	2023-10-09	1031 - 1	Sent (confirmed)	\$10.00	\$0.00	\$0.00	\$10.00	555	--	
CHRIS/HPG - WEST CHRIS/HPG - WEST	Odessa Hoppe	2023-10-09	1030 - 1	Sent (confirmed)	\$10.00	\$0.00	\$0.00	\$10.00	555	--	

The invoice's reconciliation status can be manually updated to "payable", "rejected", or "suspended", along with a payable amount, and a reason code attached.

Mock RA File ✕

Reconciliation Status

▼

- Payable**
- Rejected
- Suspended

Reason Code

▼

Cancel Receive Mock RA File

After visits have been manually reconciled with "rejected" and "suspended" statuses, they can be revised and "re-sent" to the test HPG.

Individual CHRIS/HPG

GENERATION FINISHED Export to CSV Generate Invoice

Invoice Number: Client Name: Contract ID: Batch ID:

Visit Cut-Off Date: Balance-From: Balance-To:

Status: + Revised Sent (confirmed) Rejected Suspended Draft Paid + + +

Payor: Client Group: Response Code:

More Actions Delete Regenerate

Payor	Client	Invoice Date	Invoice # - Version	Status	Billed	Paid	Response Code	Balance	Comment	BI	Batch ID	RA File	
TC LHN-TC	Aalyah Shields	2023-05-31	693 - 0	Paid	\$50.00	\$50.00	-	\$0.00	-	5	444	16855556	Send
TC LHN-TC	Gina McGrath	2023-05-31	692 - 2	Rejected	\$50.00	\$0.00	USKOLP	\$50.00	-	56	445	16855556	Revise
TC LHN-TC	Gina McGrath	2023-05-31	691 - 2	Rejected	\$50.00	\$0.00	DISCHG	\$50.00	-	56	446	16855559	Void

Add Transaction

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. [Please see this video to see how visits can be voided in this new workflow.](#)

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'. [Please see this video for more information on HCCSS Write-Offs.](#)

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.

The screenshot shows the 'Invoices > CHRIS/HPG' interface. At the top, there are search filters for Invoice Number, BRN, Client Name, Contract ID, Batch ID, Visit Cut-Off Date, Balance - From, and Balance - To. Below these filters is a status filter section with a toggle for 'Unpaid Balance' (which is turned on) and a 'Status' dropdown menu. The status options include Draft, Revised, Sent (confirmed), Voided, Paid, Deleted, Rejected, and Suspended. Below the filters is a table of invoices with columns for Payor, Client, Invoice Date, Invoice # - Version, Status, Billed, Paid, Adjustment, Balance, Comment, BRN, Contract ID, Visit Date, Respon, Batch ID, and RA File. The table contains three entries, all with a status of 'Paid'. At the bottom left, it says '1-3 of 3 entries' and at the bottom right, 'Per page: 10'.

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	View
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	View
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	View

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 HCCSS funder, up to a limit of **8,000 invoices per funder**. For funders with over 8,000 invoices, AlayaCare will create multiple batches.

[Additional details on Batch Management can be found in this video.](#)

The screenshot shows the Accounting software interface with the following table:

Batch ID	Total Items	Payor	Sent Date	Sent By	Balance	Billed	Payments	Adjustments	
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

Step 3: Requesting for Production

When ready, reach out to your AlayaCare representative to enable the new module for your production environment.

Please note the workflow below for visits that have already been invoiced to the HPG.

Visit In-Flight (LHIN to CHRIS/HPG visits)

If your agency has been on the previous version of LHIN billing, you will have **outstanding visits, invoices, and reconciliations** to manage, as the new CHRIS/HPG billing module will not account for those previous submissions.

- If you have sent invoices to HCCSS using the LHIN billing workflow (billing V1) before the CHRIS/HPG feature was activated in your production environment and a resubmission is required for any of those visits, after the CHRIS/HPG feature has been enabled in

your environment, [please watch this transitional video to understand the best workflow to manage resubmissions.](#)

- For any invoices submitted after the CHRIS/HPG Billing was enabled in your production environment, please follow the user guide and videos in ACU foundations for the new workflow.