Partner Portal - Edits

In the Partner Portal, the *Sites* tab will display all Sites related to your program and allow you to *Edit* an individual Site's Profile details or Equipment details. This document outlines how to access the Change Request feature and submit these updates to be loaded to Lifeline's platform.

Sites

Site Actions – Edit

Section	Detail
1	**Change Request –** Use the Edit function to update the Site information or change Equipment. The edit function can be accessed from the main Site list or the Profile/Equipment tab of an individual Site:
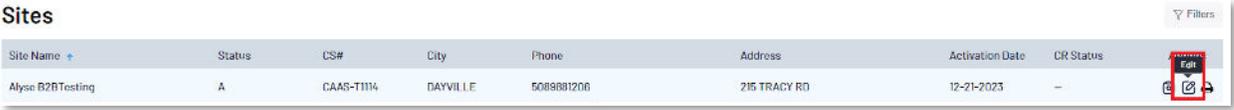
Note: The Edit page has a similar format to the Care Plan creation tab with the major difference being Site (Profile) information and Equipment information are updated on separate tabs. You can edit Profile data and Equipment information in the same transaction by making the edits to the Profile and then selecting "Proceed to edit Equipment" or vice versa.

- **Submit:** Submits the request to be automatically loaded into Lifeline's CRM
- **Proceed to edit Equipment/Profile:** Toggles between editing profile information or equipment details
- **Cancel:** Cancels the current change request

| 2 | After the appropriate updates are made to the Profile and/or Equipment sections, press *Submit* in the top right corner |

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Once you select Submit a popup warning appears stating that the action cannot be reversed and asking for confirmation to continue
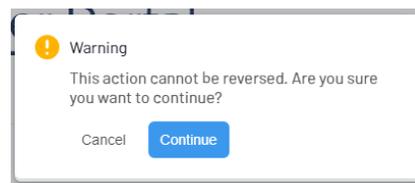
Select "Cancel" if you need to make revisions or "Continue" if you want the edit to be processed

A second pop-up will appear if you have only made edits to the profile
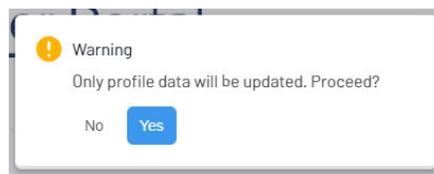
Select Yes if you want to continue with only edits to profile or No if you want to return and add edits to the equipment

The edit(s) are sent directly to Lifeline's platform and once the changes have been accepted and the updates are in the platform there are two popup messages that appear indicating the progress of the edit(s)

Note: After the *Loading completed for CarePlan* notification is received, the information has been loaded into Lifeline's platform.

If there is any delay, you can confirm the status by navigating to the *Care plans > List* tab and reviewing the submission request.

If the request Status indicates *Not Completed* then there was an error that Program Services will need to review.

After the submission is successfully loaded, it will not display on the Care Plan List tab with the default filters. You can filter on a status of *Completed* to review successful Change Request submissions.