

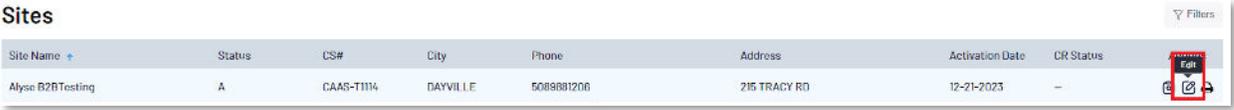
## Partner Portal - Edits

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 Name	Status	CS#	City	Phone	Address	Activation Date	CR Status	Actions
Francoette B2B Testing	PI	905711117	Marlborough	5089881234	200 Donald Lynch Boulevard	-	-	  
Jonathan Shapiro	PI	-	Long Island City	8775727742	30-30 47th Avenue	-	-	  
OTB MyConnect	PI	-	Long Island City	2124388891	30-30 47th Avenue	-	-	  
Saiima Hijir	A	-	Marlborough	4164453353	200 Donald Lynch Boulevard	-	-	  
Samir Hijir	A	1212121212	Marlborough	4164533027	200 Donald Lynch Boulevard	03-09-2024	-	  
Samir Hijir	PI	-	Marlborough	4164453387	200 Donald Lynch Boulevard	-	-	  
Samir2 Hijir2	PI	-	Marlborough	4164453387	200 Donald Lynch Boulevard	-	-	  
Test Portal 6	PI	-	Long Island City	2124388891	30-30 47th Avenue	-	-	  
Test Portal 9 / Test: Second	PI	-	Long Island City	2124388891	30-30 57th Street	-	-	  
Test Portal 5	PI	-	Long Island City	2124388891	30-30 47th Avenue	-	-	  

### Site Actions – Edit

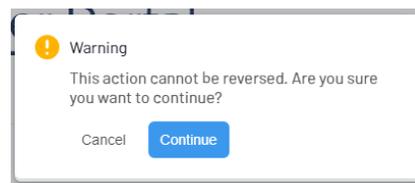
Section	Detail
1	<p><b>Change Request</b> – Use the Edit function to update the Site information or change Equipment. The edit function can be accessed from the main Site list or the Profile/Equipment tab of an individual Site:</p>  

**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.

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

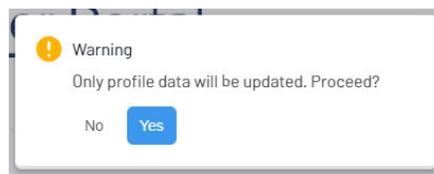
Once you select Submit a popup warning appears stating that the action cannot be reversed and asking for confirmation to continue



Select “Cancel” if you need to make revisions or “Continue” if you want the edit to be processed

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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)

The screenshot displays the Lifeline Partner Portal interface. At the top, the 'Lifeline' logo is on the left, and 'Partner Portal' is on the right. A navigation menu includes 'Home', 'Care plans', 'Sites', 'Jobs', 'Equipment', 'Actions', 'Activities', 'Reports', and 'Dashboards'. Below this, a secondary menu shows 'Summary', 'Profile', 'Alarms', 'Events', 'Jobs', 'Equipment', 'Actions', and 'Activities'. The main content area is divided into sections: '1. Common Information' (Program Code, HSR's Name, Install Date), '2. Site' (Residential Street Address), '3. Subscriber' (with a checkbox for 'Sumantestsixf...'), and '4. Responder' (with an 'Add reminder' button). A large 'Address' section is highlighted, showing '30 Edgell Road, Framingham, MA 01701, USA' and a map view. Below the map, it lists 'Country: USA', 'City: Framingham', 'Postal Code: 01701', 'Province/Territory: MA', 'Street Name: Edgell Road', and 'Street Number: 30'. There are input fields for 'Apartment', 'PO Box', and 'Cross Street'. A 'Directions To Home' button is present, with a text box containing 'opposite to school'. Two notification banners are visible at the top right: one stating 'Change request has been queued and will be processed' and another stating 'Loading completed for CarePlan #922, site #10000721'.

**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.