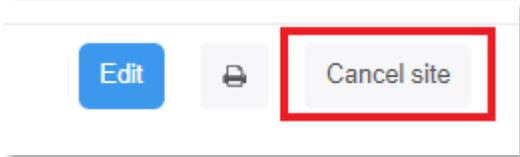
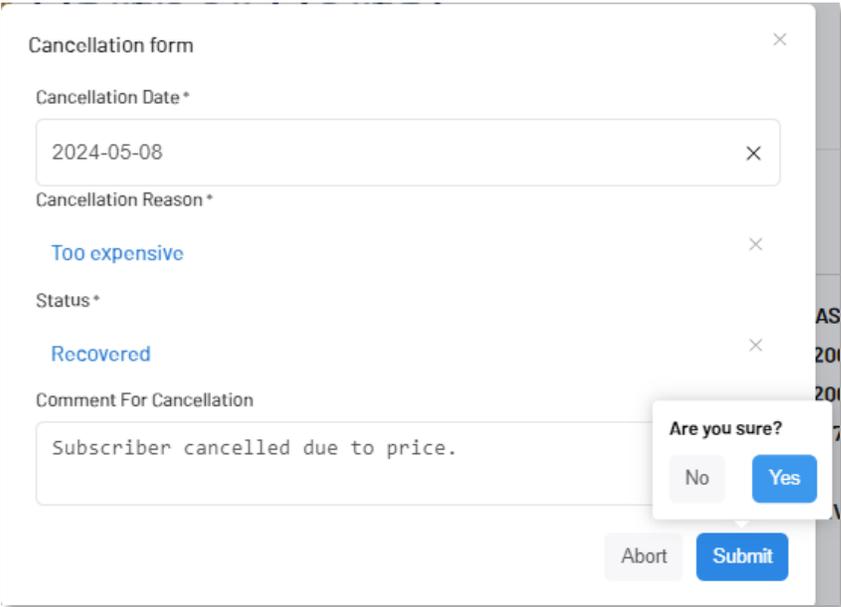


Partner Portal – Cancellations

Cancellations in the Partner Portal can be accessed while viewing an individual Site from the *Site* tab. The option to cancel will always be in the top right while viewing any of the various tabs for an individual Site.

The screenshot shows the 'Site' profile page in the Partner Portal. At the top right, there are three buttons: 'Edit', a printer icon, and 'Cancel site', with the 'Cancel site' button highlighted by a red rectangle. The main content area is divided into two sections: '1. Common Information' and '2. Site'. The 'Common Information' section includes fields for Program Code, Install Date, HSRs Name, and Form Language. The 'Site' section includes an address field with a map icon and a ZIP code field.

Step	Action
1	<p>From the <i>Site</i> select the <i>Cancel site</i> button at the top right of the screen</p> 
2	<p>Select the appropriate Cancellation Date, Cancellation Reason, and Equipment Status (Equipment recovered, Lost / Damaged, or Not Recovered) There is a field to add an option cancellation comment:</p>  <p>After clicking <i>Submit</i> the system will confirm that you want to cancel the Site. Select Yes to proceed with Cancellation or No if changes need to be made.</p> <p>Note: Cancellations do not appear as a Care Plan request on the Care Plan list. You will see a <i>Portal Cancellation</i> action display in the <i>Actions</i> tab to indicate a cancellation was requested. This Action will remain open until a Lifeline representative has gone in to cancel billing and update the Site status. The equipment will be available in your inventory if the status was labelled as “Recovered”</p>

Home Care plans Sites Jobs Equipment **Actions** Activities Reports Dashboards

Actions

Action #	Name	Type	Status	Site Name	Create Date	Due Date	Complete Date	Phone
100003329	Portal Cancellation	Accounting	Open	Andy.Flowwwwr	05-08-2024	05-08-2024	–	5081192345

Cancellation Criteria: Cancellation requests can only be submitted against Active accounts. If you are trying to cancel an account before it has been activated, contact Program Services to process the request.