Partner Portal- Care Plan Tab

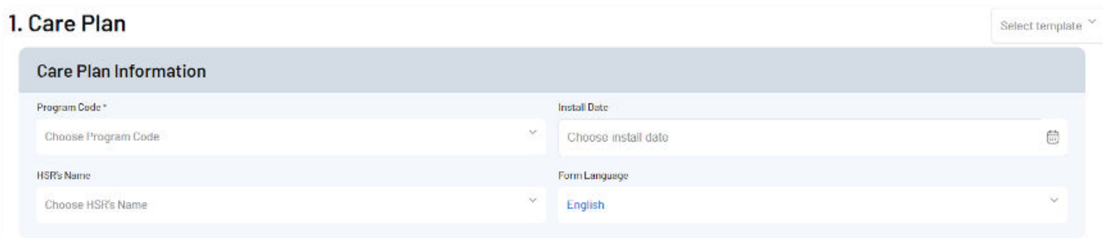
In the Care plans tab, there are two options; Create a New Careplan or List. New Careplan is adding a new subscriber to your program and List reviews the progress of the Care plans entered.

Care Plan

New Careplan – select New Careplan to add a new subscriber to your program.

<table>
<tr><th>Section</th><th>Detail</th></tr>
<tr><td>1</td><td>

Adding a new site (subscriber)



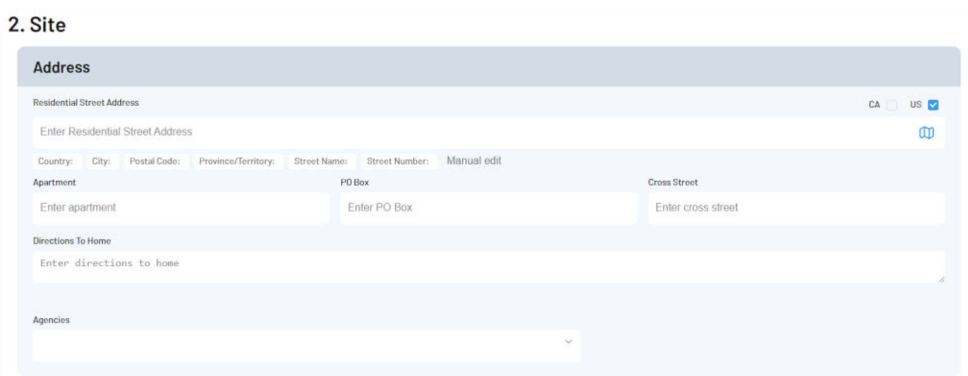
Care Plan Information – enter information according to program specifics. * indicates a mandatory field

Program Code – enter appropriate program code
Install Date – if known, enter the install date
HSR’s Name – enter HSR’s name who will complete the install
Form Language – enter language of the subscriber

Select Template – If your Office Administrator has saved any Care Plan templates, you can select them using the dropdown in the top right corner of the screen. These will populate any pre-configured information into the Care Plan from the template.

</td></tr>
<tr><td>2</td><td>

Site – Details the location where the equipment will be utilized. All information will be utilized in the Response Center.

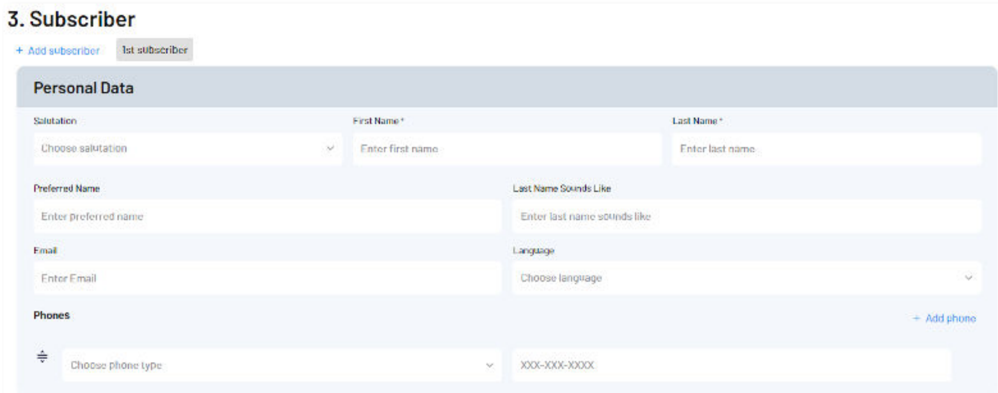


Residential Street Address – enter the subscriber’s street address
Apartment - enter the apartment number if appropriate
PO Box – This field should not be used. The Site address is intended to send help to the subscriber.
Cross Street – enter cross street if available
Directions To Home – enter directions to the subscriber’s home if available

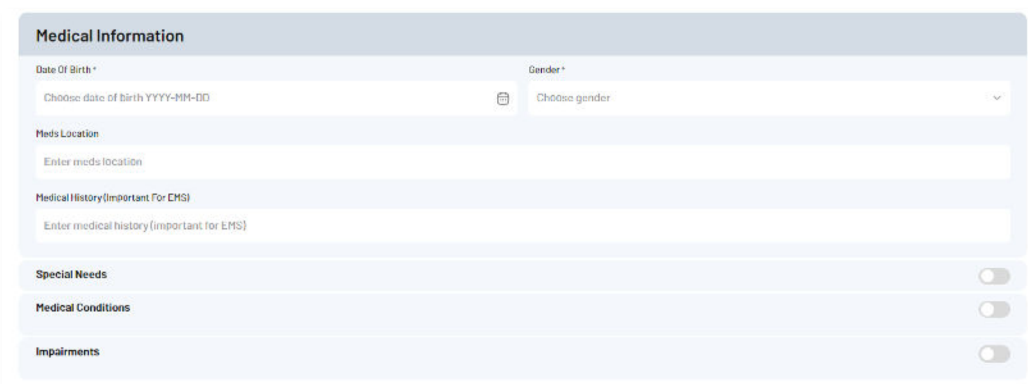
</td></tr>
</table>

	Agencies – Select any Hospitals or Primary Physicians that have been added by your Office Administrator as needed **Note:** If your user profile is an Office Administrator role, you can add/remove agencies from the Agencies tab. Please see the document Partner Portal – Agencies Tab for guidance

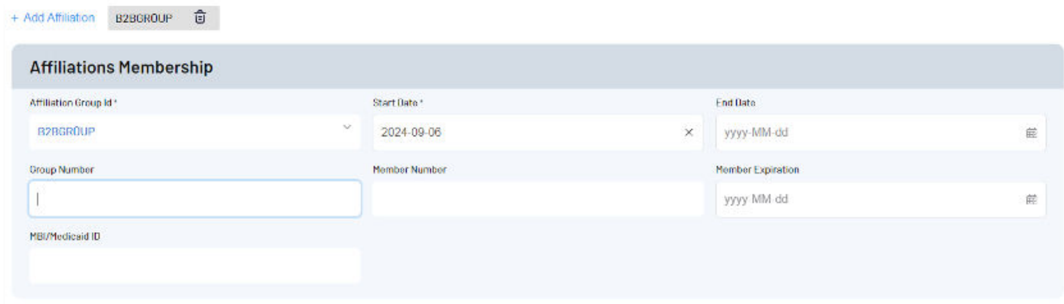
<table>
<tr>
<td>3</td>
<td>Subscriber Details – Enter subscriber details as appropriate. Ability to add additional subscriber to the site. * indicates mandatory fields.



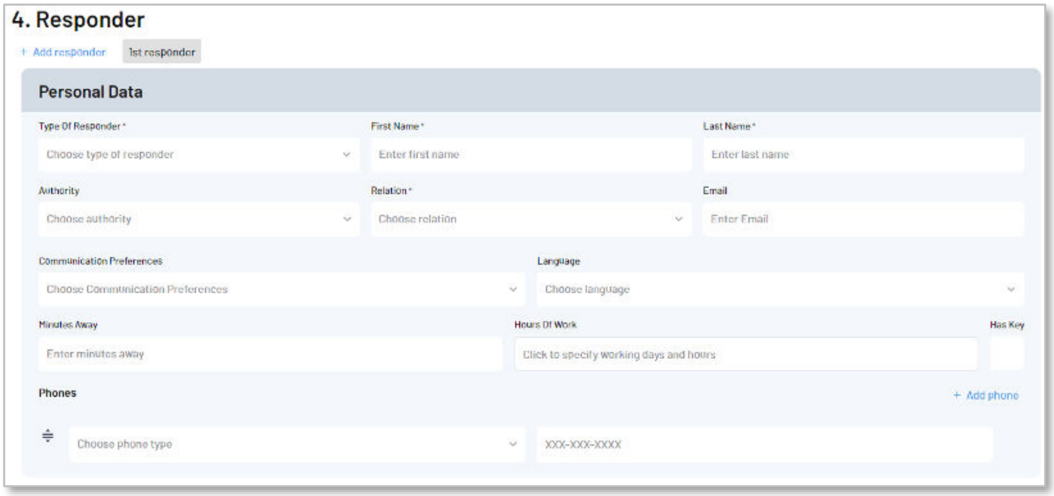
Salutation – select appropriate salutation, not a mandatory field
First Name – enter first name
Last Name – enter last name
Preferred Name – enter preferred name utilized by the Response Center
Last Name Sounds Like – enter sounds like information as appropriate
Email – enter subscriber email address
Language – enter subscriber’s language
Phones – enter subscriber phone numbers; indicate type of phone and the number</td>
</tr>
<tr>
<td>4</td>
<td>Medical Information – enter the subscriber medical information. * indicates mandatory fields.



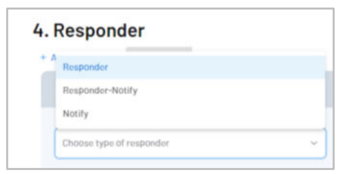
Date Of Birth – enter DOB in appropriate format
Gender – choose appropriate gender
Meds Location – enter location of meds in the subscriber’s home if available
Medical History (Important for EMS) – enter any medical history that would be important for EMS to know in an emergency situation
Special Needs – if the subscriber has any special needs, push the toggle for a pick list of Special Needs
Medical Conditions – if the subscriber has any medical conditions, push the toggle for a pick list of Medical Conditions
Impairments – if the subscriber has any impairments, push the toggle for a pick list of the impairments
Add Affilliation
The affiliation section is for state funded subscribers. If you do not have state funded subscribers, you do not need to access this section.
If a member needs to have any group member IDs associated to Medicaid, click the +Affiliation link to enable the Affiliations Membership window. Select the B2BGROUP Affiliation Group ID and</td>
</tr>
</table>

	populate the appropriate fields related to the member's policy/plan. Multiple affiliations can be added by click the + Add Affiliation link if the site is a multi-subscriber household 

5	**Responder Details** – enter the subscriber's responders

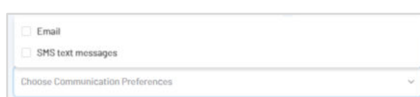


Type Of Responder – select appropriate responder type. Responder – Notify would be selected for someone who can be a responder and does wants to be notified of any incidents. Notify would be selected for someone who is not a responder but does want to be notified of incidents.

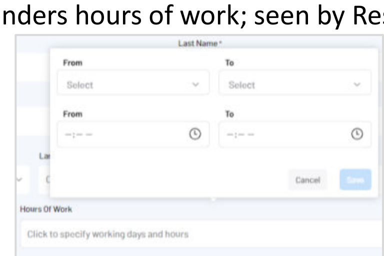


First Name – enter the first name of the responder
Last Name – enter the last name of the responder
Authority – enter the type of authority the responder should have. This is relevant to Away Service and Administrator on the account

Relation – choose the appropriate relationship to the subscriber
Email – enter the responder's email address
Communication Preferences – enter responder communication preference; Email or SMS text messages



Language – choose the appropriate responder's language
Minutes Away – enter the number of minutes away from the subscribers home
Hours Of Work – enter the responders hours of work; seen by Response Center associates



Has Key – check box if the responder has a key to the subscribers home
Phones – enter in responder phone details; type of phone and phone number

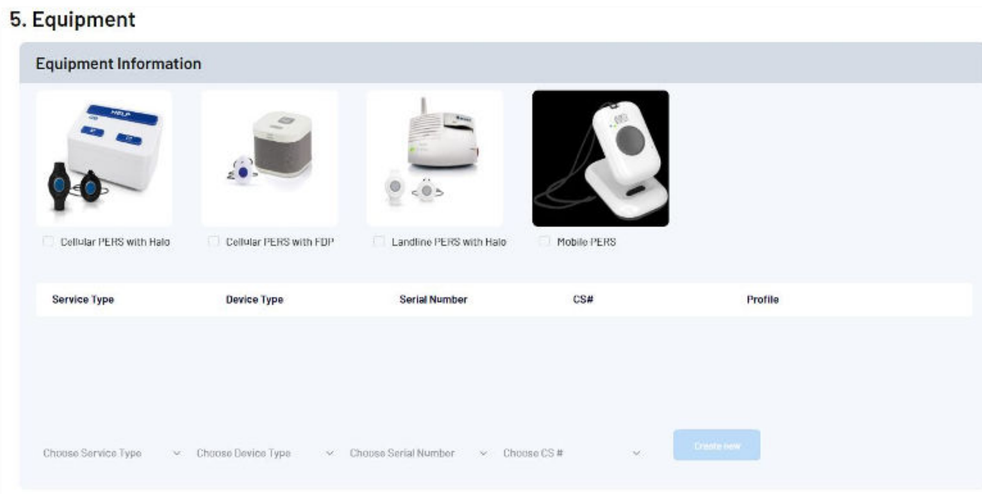
<table>
<tr><td></td><td>

Responder Address

There is a toggle below the Responder information that can be turned on to add an address related to the selected responder. The format for adding addresses is the same as the subscriber address field. There is an additional field to add a comment as needed.

</td></tr>
<tr><td>6</td><td>

Equipment Information – select the equipment for subscriber. In this section you can select equipment from inventory, add a Serial Number or CS# if the inventory is not loaded. Another option is to select the service and indicate that the device will be selected later.

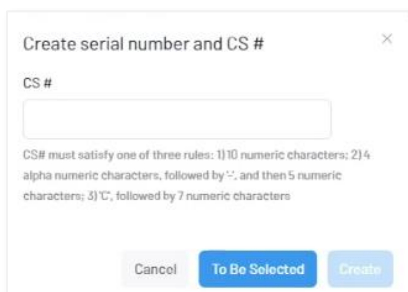


Select Service Type and Device Type using the drop downs in Service Type and Device Type

Note: If adding a mobile device with fall detection, select *Mobile PERS Add-On* and then the appropriate fall detection after the mobile device has been selected.

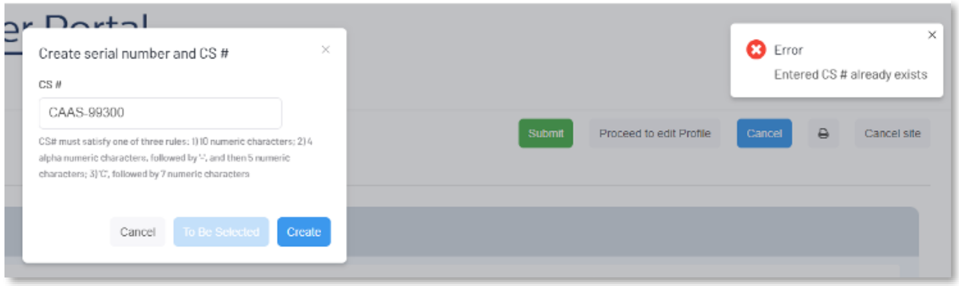
Select Serial Number or CS# via dropdowns if inventory is entered in MAS

Select Create New to enter the ID information or To Be Selected to call the ID information when installing



If the device already exists in the system, you will receive an error message indicating the CS# already exists. If this is the case, call Program Services to verify the status of the equipment.

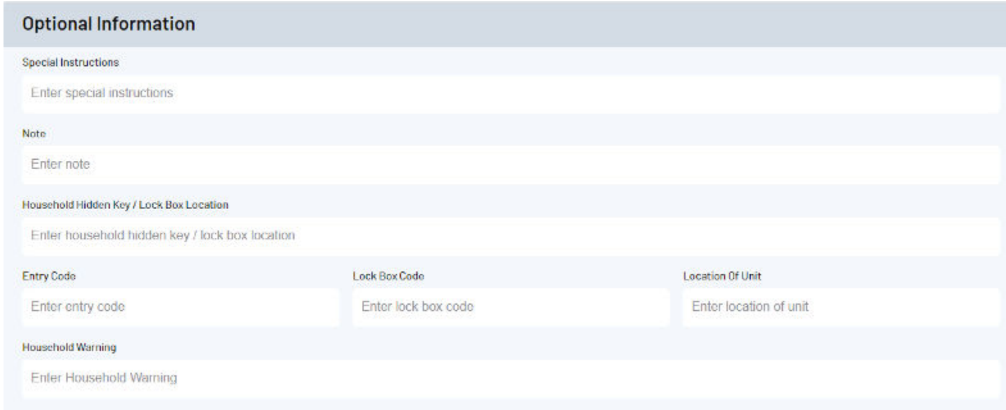
</td></tr>
</table>

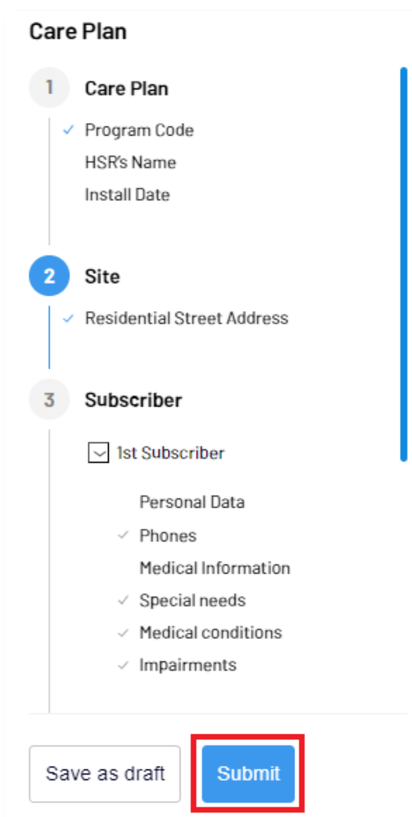


Note: it is an option to leave the device ID information and have the Installer call in with the equipment ID by using the “To Be Selected” option

Installation Comment

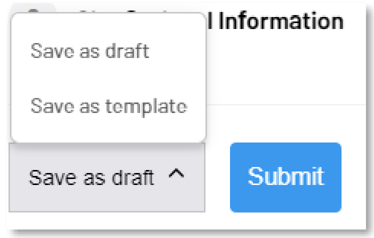
Below the Equipment Information is a field to add any installation comments as needed. This will display on the associated Job that is created to reference as needed.

<table>
<tr>
<td>7</td>
<td>
Site Optional Information – opportunity to add additional household information to better support emergency situations.


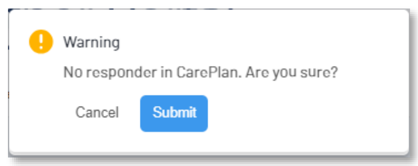
Special instructions – enter any special instructions
Note – add any notes for the account (notes be visible by the Emergency Response Center Team)
Household Hidden Key/Lock Box Location – enter hidden key or lock box location details
Entry Code – enter entry code
Lock Box Code – enter lock box code
Location of Unit – enter location of the unit
Household Warning – Any specific warnings for the household that the Emergency Response Center Team needs to relay to Emergency Services.
</td>
</tr>
<tr>
<td>8</td>
<td>
After all relevant information is filled out, press the Submit button on the left side of the screen (Note: If you wish to return to the Care Plan to finish it at a later date, you can click Save as draft to save the form. It will display in the Care Plan list as a Draft)


Office Administrator Note for Templates:
</td>
</tr>
</table>

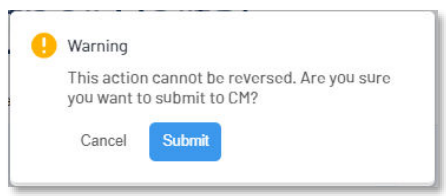
If your user account is an office administrator, the *Save as draft* button will have a ^ symbol to bring up a pick list. You can either save the Care Plan as a draft to follow-up before submitting, or if you've entered generic information that needs to be saved as a template, you can choose "Save as template" to add it to the list of available templates for office users.



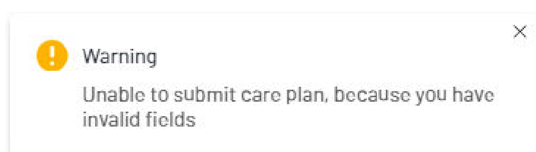
If no responder was selected, you will receive a prompt to confirm you want to submit without a responder

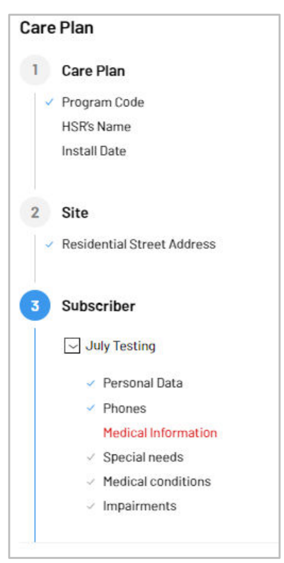


The system will advise that the submission will be final and the data will be loaded into Lifeline's CRM.

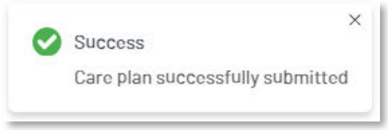


Note: If there is any required information missing, you will receive an error message and the left side of the screen will highlight the fields missing. Update the missing fields and submit again.

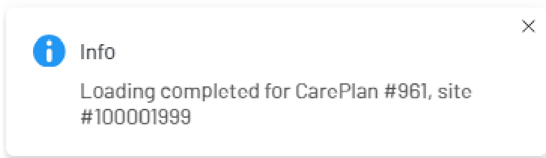




If all field are valid, the system will confirm that the submission was a success

<table>
<tr><td></td><td>


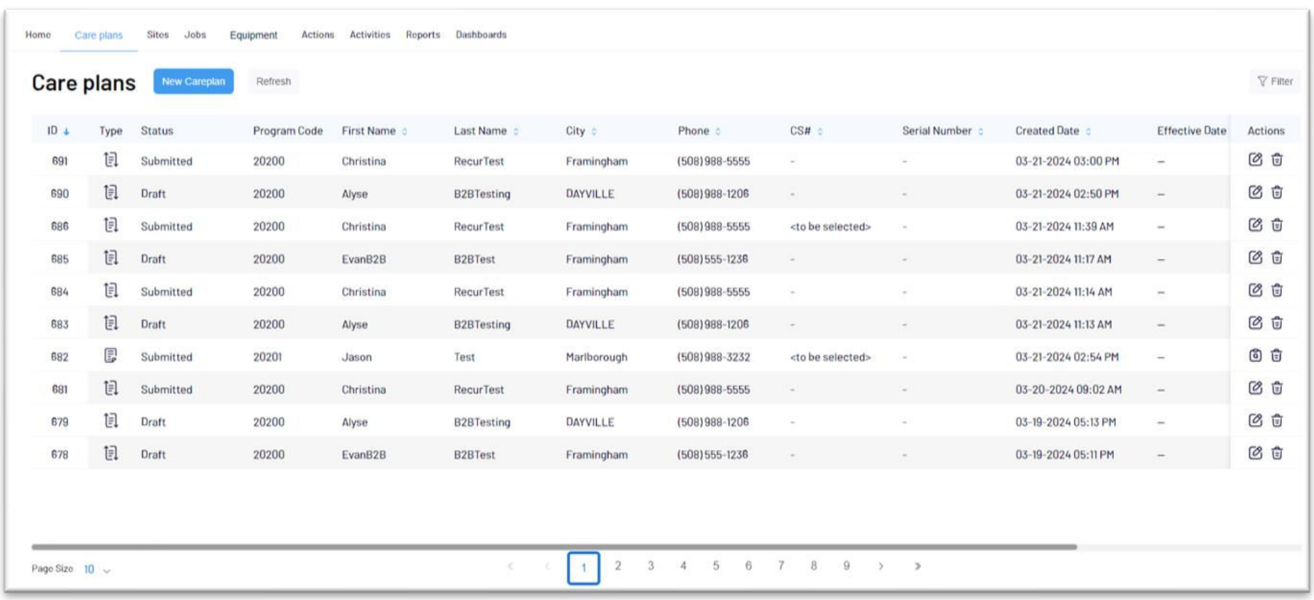
The Care Plan submission will now be loaded into Lifeline's CRM and you will see notifications indicating that the loading is completed



Note: If the Loading completed for CarePlan notification does not display or there is a delay, navigate to the Care plans > List tab to review the status. If the status indicates Not Completed then Program Services will need to review any issues. Successfully loaded Care Plan requests are automatically filtered off of the List tab and can be reviewed by filtering on the Completed status.
</td></tr>
</table>

Care Plan- List

List – this is a view of activity of the Care plans (subscribers) added in the portal, but have not been installed. Any item entered is visible immediately following entry as Submitted. Once the item is added to the Lifeline systems, the item will not longer be visible in the list view and all updates are visible in Sites.

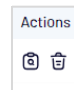


ID	Type	Status	Program Code	First Name	Last Name	City	Phone	CS#	Serial Number	Created Date	Effective Date	Actions
691		Submitted	20200	Christina	RecurTest	Framingham	(508) 988-5555	-	-	03-21-2024 03:00 PM	–	
690		Draft	20200	Alyse	B2BTesting	DAYVILLE	(508) 988-1206	-	-	03-21-2024 02:50 PM	–	
686		Submitted	20200	Christina	RecurTest	Framingham	(508) 988-5555	<to be selected>	-	03-21-2024 11:39 AM	–	
685		Draft	20200	EvanB2B	B2BTest	Framingham	(508) 555-1236	-	-	03-21-2024 11:17 AM	–	
684		Submitted	20200	Christina	RecurTest	Framingham	(508) 988-5555	-	-	03-21-2024 11:14 AM	–	
683		Draft	20200	Alyse	B2BTesting	DAYVILLE	(508) 988-1206	-	-	03-21-2024 11:13 AM	–	
682		Submitted	20201	Jason	Test	Marlborough	(508) 988-3232	<to be selected>	-	03-21-2024 02:54 PM	–	
681		Submitted	20200	Christina	RecurTest	Framingham	(508) 988-5555	-	-	03-20-2024 09:02 AM	–	
679		Draft	20200	Alyse	B2BTesting	DAYVILLE	(508) 988-1206	-	-	03-19-2024 05:13 PM	–	
678		Draft	20200	EvanB2B	B2BTest	Framingham	(508) 555-1236	-	-	03-19-2024 05:11 PM	–	

<table>
<tr><th>Section</th><th>Detail</th></tr>
<tr><td>1</td><td>
List – Any Care plan that is entered into the portal will be visible as it goes through the stage of completion

Columns in the list

ID – The number of the Careplan entry
Type – hover over the picture symbol and it will show you the type of Care plan entry
Care Plan
Change Request
Status – status of the Care Plan
Draft – program started the Care plan, but has not submitted it
Submitted – Care plan has been submitted to be loaded into Lifeline's CRM
</td></tr>
</table>

	Completed – The Care Plan has been processed into the CRM Not Completed – There was an error processing the Care Plan into the CRM, contact Program Services to review. Awaiting Validation – Indicates that there was an error when attempting to upload, contact Program Services to review. Program Code – Program code for the Care Plan First Name – first name of the subscriber Last Name – last name of the subscriber City – city address for the subscriber Phone – phone number of the subscriber CS # - ID for the equipment Serial Number – serial number for the equipment Created Date – date the Care plan was created Actions – hover over the symbols to see option to view or delete the Care plan 

2	**Filter** – you can filter the Care Plan to allow quicker access to the Care plan you are working on.