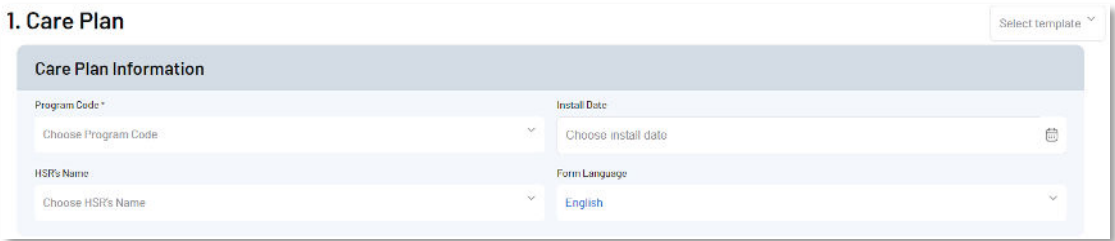
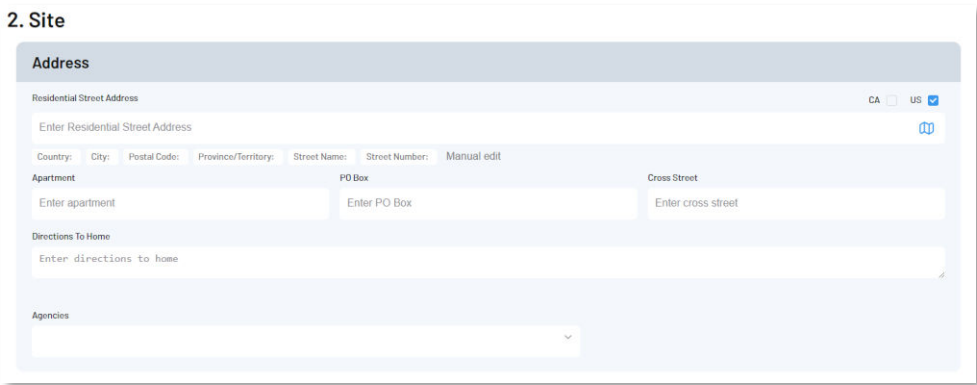


## Partner Portal- Care Plan Tab

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.

Section	Detail
1	<p><b>Adding a new site (subscriber)</b></p> <p><b>1. Care Plan</b></p>  <p><b>Care Plan Information</b> – enter information according to program specifics. * indicates a mandatory field</p> <p>Program Code – enter appropriate program code</p> <p>Install Date – if known, enter the install date</p> <p>HSR's Name – enter HSR's name who will complete the install</p> <p>Form Language – enter language of the subscriber</p> <p><b>Select Template</b> – 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.</p>
2	<p><b>Site</b> – Details the location where the equipment will be utilized. All information will be utilized in the Response Center.</p> <p><b>2. Site</b></p>  <p><b>Residential Street Address</b> – enter the subscriber's street address</p> <p><b>Apartment</b> - enter the apartment number if appropriate</p> <p><b>PO Box</b> – This field should not be used. The Site address is intended to send help to the subscriber.</p> <p><b>Cross Street</b> – enter cross street if available</p> <p><b>Directions To Home</b> – enter directions to the subscriber's home if available</p>

	<p>Agencies – Select any Hospitals or Primary Physicians that have been added by your Office Administrator as needed</p> <p><b>Note:</b> 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</p>
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**Subscriber Details** – Enter subscriber details as appropriate. Ability to add additional subscriber to the site. \* indicates mandatory fields.

3

**3. Subscriber**

+ Add subscriber    - Add phone

**Personal Data**

Salutation: Choose salutation (dropdown)    First Name\*: Enter first name (text)    Last Name\*: Enter last name (text)

Preferred Name: Enter preferred name (text)    Last Name Sounds Like: Enter last name sounds like (text)

Email: Enter Email (text)    Language: Choose language (dropdown)

Phones: Choose phone type (dropdown)    XXX-XXX-XXXX (text)    + Add phone

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

**Medical Information** – enter the subscriber medical information. \* indicates mandatory fields.

4

**Medical Information**

Date Of Birth\*: Choose date of birth YYYY-MM-DD (text)    Gender\*: Choose gender (dropdown)

Meds Location: Enter meds location (text)

Medical History (Important for EMS): Enter medical history (important for EMS) (text)

Special Needs: [Toggle Switch]

Medical Conditions: [Toggle Switch]

Impairments: [Toggle Switch]

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 Affiliation

**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

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

+ Add Affiliation

B2BGR0UP

Affiliations Membership

Affiliation Group Id \*

B2BGR0UP

Start Date \*

2024-09-06

X

End Date

yyyy-MM-dd

Group Number

Member Number

Member Expiration

yyyy MM dd

MBI/Medicaid ID

## Responder Details – enter the subscriber's responders

**4. Responder**

+ Add responder   test responder

**Personal Data**

Type Of Responder \*   First Name \*   Last Name \*

Choose type of responder   Enter first name   Enter last name

Authority   Relation \*   Email

Choose authority   Choose relation   Enter Email

Communication Preferences   Language

Choose Communication Preferences   Choose language

Minutes Away   Hours Of Work   Has Key

Enter minutes away   Click to specify working days and hours

Phones

Choose phone type   XXX-XXX-XXXX   + Add phone

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.

**4. Responder**

+ A   Responder

Responder-Notify

Notify

Choose type of responder

5

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

**Personal Data**

All Authority

Administrator

Away Contact

Choose authority

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

☐ Email

☐ SMS text messages

Choose Communication Preferences

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

Last Name \*

From   To

Select   Select

From   To

Click to specify working days and hours

Cancel   Save

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

## 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.

**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.

### 5. Equipment

6

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.

The screenshot shows a web portal interface. A modal dialog box titled "Create serial number and CS #" is open. It contains a text input field for "CS #" with the value "CAAS-99300". Below the input field, there is a note: "CS# must satisfy one of three rules: 1) 10 numeric characters; 2) 4 alpha numeric characters, followed by '-', and then 5 numeric characters; 3) 'C', followed by 7 numeric characters". At the bottom of the dialog are three buttons: "Cancel", "To Be Selected", and "Create". In the background, there is a form with a green "Submit" button, a link "Proceed to edit Profile", a blue "Cancel" button, a printer icon, and a "Cancel site" link. An error message box in the top right corner says "Error" with a red 'x' icon and the text "Entered CS # already exists".

**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.

The screenshot shows a text input field labeled "Installation Comment". The field is empty and has a character count "0/255" on the right side.

7

**Site Optional Information** – opportunity to add additional household information to better support emergency situations.

**Optional Information**

Special Instructions  
Enter special instructions

Note  
Enter note

Household Hidden Key / Lock Box Location  
Enter household hidden key / lock box location

Entry Code  
Enter entry code

Lock Box Code  
Enter lock box code

Location Of Unit  
Enter location of unit

Household Warning  
Enter Household Warning

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.

8

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)

**Care Plan**

1 **Care Plan**  
✓ Program Code  
HSR's Name  
Install Date

2 **Site**  
✓ Residential Street Address

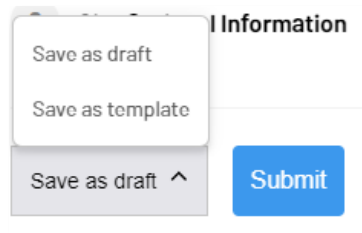
3 **Subscriber**  
✓ 1st Subscriber  
Personal Data  
✓ Phones  
Medical Information  
✓ Special needs  
✓ Medical conditions  
✓ Impairments

Save as draft Submit

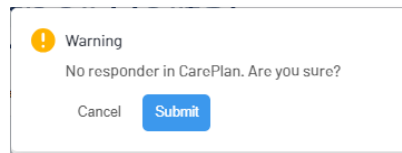
**Office Administrator Note for Templates:**



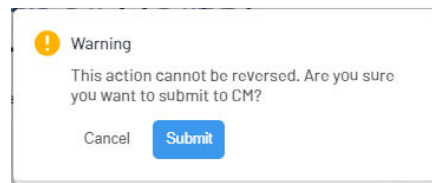
If your user account is an office administrator, the *Save as draft* button will have a ^ symbol to bring up a pick list. You can either save the Care Plan as a draft to follow-up before submitting, or if you've entered generic information that needs to be saved as a template, you can choose "Save as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



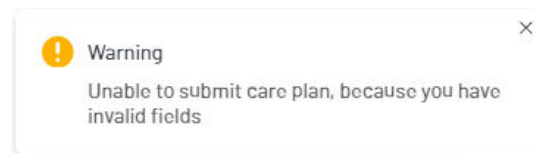
If no responder was selected, you will receive a prompt to confirm you want to submit without a responder



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.

A screenshot of a 'Care Plan' form. It is divided into three numbered sections. Section 1, 'Care Plan', includes 'Program Code', 'HSR's Name', and 'Install Date'. Section 2, 'Site', includes 'Residential Street Address'. Section 3, 'Subscriber', includes a 'July Testing' checkbox and several checked items: 'Personal Data', 'Phones', 'Medical Information' (highlighted in red), 'Special needs', 'Medical conditions', and 'Impairments'.

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

Success

Care plan successfully submitted

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

Info

Loading completed for CarePlan #961, site #100001999



**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.

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.

Home Care plans Sites Jobs Equipment Actions Activities Reports Dashboards												
Care plans New Careplan Refresh Filter												
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	-	
Page Size 10 1 2 3 4 5 6 7 8 9 >												

Section	Detail
1	<p><b>List</b> – Any Care plan that is entered into the portal will be visible as it goes through the stage of completion</p> <p><b>Columns in the list</b></p> <p>ID – The number of the Careplan entry</p> <p>Type – hover over the picture symbol and it will show you the type of Care plan entry</p> <p>Care Plan</p> <p>Change Request</p> <p>Status – status of the Care Plan</p> <p>Draft – program started the Care plan, but has not submitted it</p> <p>Submitted – Care plan has been submitted to be loaded into Lifeline’s CRM</p>

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

2

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

Filters

Active Only

☐

Name

Enter Name

CS Includes

Enter CS includes

Field Name

Field Name

▼

Condition

Condition

▼

Reset

Apply