## Partner Portal Care Plan or Edit Process- Equipment

This document outlines the process for entering equipment to a new Care Plan submission or Edit. For any Change Requests, you can navigate to the *Edit Equipment* area by using the toggle at the top right of the page

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## Entering Equipment to Create a Job (Order)

**Equipment Information** – Select the equipment for the subscriber (create a job.)

In this section, you can choose on of the following 3 options for selecting the equipment:

- 1. Select Serial/CS Number for the equipment from inventory.
- 2. Add a Serial/CS Number for the equipment if the inventory is not loaded.
- 3. Select the equipment and indicate that the Serial/CS Number will be provided later.

5. Equipment					
Equipment Informati	ion				
Celulur PERS with Halo	Colleger PERS with FDP	e 🔅	Mobile PERS		
Service Type	Device Type	Serial Number	CS#	Profile	
Choose Genter Type 🛛 🗸	Choose Desice Type 🛛 🛩	Choose Serial Humber 🛛 👻 Cho	ose CS # ~	Oren en	

Ontion 1 Salast Social/CS Number from Inventory				
Option	Jption 1 – Select Senal/CS Number from Inventory			
Step	Action			
	Select the type of equipment for the subscriber			
	Equipment Information			
1	Cellular PERS with Halo			
T				
	Collular DEPS			
	Landline PERS			
	Mobile PERS			
	Buttons			
	Folect S			
	Select the Device Type			
	Conduct PERS with Halo			
2				
	Service Type Device Type			
	HomeSafe Window 7000C(0)			
	Assure(2) HomeSafe Wireless 72002(1)			
	Column PERS × Foliort v Se			

	Select the Serial Number or CS Number via the dropdowns ( <b>Note:</b> Inventory has to be entered into Lifeline's CRM for the Serial/CS to display)
	CRIVI for the Serial/CS to display)
3	Collider PERS with Halo Collider PERS with FIDP Landline PERS with FIDP Landline PERS with Halo
	Service Type Device Type Servial Number CS#
	Culture PERS = HouseState Westers 200., v Endert v Endert v
	After selected, the Equipment Type with the Serial/CS Number is now in the Job (Order) for the Subscriber.
4	Collular PERS with Halo
	Service Type Device Type Serial Number CS# Profile
	Cellular PERS HomeSafe Wireless 7200.C11 - V 805T11117 V 8
	Add an associated button as applicable.
	Activity&Away
	Landline PERS
	Mobile PERS
	Buttons
	Buttons
-	Note: If a mobile device is being installed with fall detection, add fall detection by selecting <i>Mobile PERS</i>
5	Add-On
	Accessories
	Activity&Away Buttons
	Cellular PERS
	Landline PERS
	Medication
	Mobile PERS
	Mobile PERS Add-On
	Select
	Select the button type.
	Conduct PEDS with Net
6	Torriso Type  PDPUGE - Fair Deversion-Internet-Intel Culture PDB  PDPUGE - Fair Deversion-Internet-Intel  PDPUGE - Fair Deversion-Internet-In
	Had20 - Present High Sector (1) Rubble - Present High Sector (1) Rubble - Present High Sector (1)
	Batter 1 Enter State Sta
	<b>Note:</b> It fail detection is being added for a mobile device, select the appropriate fail detection offering.

	Micron F DP (U)
	OTG Mini FDP(0)
	Smart Watch FDP(0)
	Select
	Select the Serial Number/CS Number if it is in inventory or enter the Serial/CS Number
	Partner the serial number
	Active Active Pages Band 201223467
	Collifiar PERS with FBIP Collifiar PERS with FDP Landline PERS with FDP Landline PERS with FBIP
	Service Type Device Type Serial Number CS# Perilie Select Create Serial number
	if there is no serial number
	to select from drop downs
	Bettons × F0997-Fall Detection_ × Select v Select
	If there is existing equipment, indicate whether you are adding new equipment or swapping the existing
	device. If you select Swap you will still need to submit a change request to remove the equipment once it is
	removed from the home.
	Do you want to swap with existing equipment or just add a new one? $$ $$ $$ $$ $$ $$
7	Micron - Mytrex Portal (5) - MT01-15823
	Just Add Swap
	After you have all of the equipment for the desired service, your Job (Order) is complete.
	Equipment Information
	Celular PERS with Halo Celular PERS with FDP Landline PERS with FDP Landline PERS with Halo
	Service Type Device Type Serial Number CS# Profile
	Collador/FXIPS         HomeSale Wreless 2200C(1)         -         V         IOSTITUT7         V         Ei           Buttons         FIDP917-Fail Detection Button         V01224587         -         -         8         Ei
	Bettens (K) FDP97-Fall Detection X Select
Ontion	2 - Add a Serial/CS Number For the Equipment if the Inventory is not Loaded
Option	
Step	Action
	Select the type of equipment for the subscriber
	Equipment Information
	Y
1	Cellular PERS with Halo
	Activity8Away
	Cellular PERS
	Landline PERS
	Mobile PERS Billione
	Beleet
2	Select the Device Type

Contraction of the second seco	collidar PERS with Halo	CellWar PERS with FDP
Service	rvice Type	Device Type
		HomeSafe Wireless 7000C(0) Assure(2)
Constant	lar PERS ×	HomeSafe Wireless 7200C (1) Belect

	Click Create new to enter the Serial Number/CS Number for the equipment			
3	<ul> <li>Print Print Pri</li></ul>			
	After selected, the Equipment Type with the Serial/CS Number is now in the Job (Order) for the Subscriber.			
4	Service TypeDevice TypeSarial NumberCS.FMPrefileCeliliur PERSHomeSafe Wirelers 7200 (1)-\$ \$05111117\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$			
	Add an associated button as applicable.			
5	Activity&Away         Colludar PERS         Mobile PERS         Buttons         Puttons         Add-On			
6	Select the button type.			

<b>Note:</b> If fall detection is being added for	a mobile device, select the appropriate fall detection offering.
	OTG FDP (0)
	Micron FDP (0)
	OTG Mini FDP (0)
	Smart Watch FDP(0)
	Select

	Select the Serial Number/CS Number if it is in inventory or enter the Serial/CS Number
	Partner Wew serial number The serial / CS #
	Active Active Reports Readed Terror T
	Cellifar PERS with Halo Cellifar PERS with FDP Landlex PERS with FDP Landlex PERS with Falo
	Service Type Device Type CS# Prefix Contar PTRS Howstark Writes 2000(10 - 90011117) 2 2 Select Create Serial number
	if there is no serial number
	to select from drop downs
	Retros × 19997-fallowedow, × Sect. × Sect. × Inter × I
	Note: There is still an option to click < to be selected > if the iD information will be called in or selected later.
	If there is existing equipment, indicate whether you are adding new equipment or swapping the existing
	device. If you select Swap you will still need to submit a change request to remove the equipment once it is
	removed from the home.
7	Do you want to guine with evicting conjuggent or just add a new one?
	bo you want to awap with existing equipment of just aud a new ones
	Micron - Mytrex Portal (5) - MT01-15623
	Just Add Swap
	After you have all of the equipment for the desired service, your Job (Order) is complete.
	Equipment Information
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	Cellular PERS with Halo Cellular PERS with FDP Landline PERS with FDP Landline PERS with Halo
	Service Type Device Type Serial Number CS# Profile
	Buttons FIIP917-Fail Detection Button 101124567 V 8 G
	Bettons × FD997-Fall Detection × Select × Select ×
Option	3 – Select the Service/Equipment and Indicate that the ID Information will be
Provid	ed Later
Cham	
Step	Action Select the type of equipment for the subscriber
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1	
	Cellular PERS
	Landline PERS
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2	Select the Device Type
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Service	rvice Type	Device Type
		HomeSafe Wireless 7000C(0) Assure(2)
Constant	lar PERS ×	HomeSafe Wireless 7200C (1) Belect

	Indicate that the Equipment will be selected (To Be Selected)
3	Control to the total tot
	Add an associated button as applicable.
4	Activity&Away Collular PERS Landino PERS Wobile PERS Buttons Puttons Value of the constraints of the constraint of the constraints of the constrai
	Select the button type.
5	Note: If fall detection is being added for a mobile device, select the appropriate fall detection offering.
6	Select Create Serial Number to note that the ID information will be provided later

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heres room fatheres the fatheres Select	ct Create Serial number
device. If you select <i>Swap</i> you will still need to submit a change request to remove removed from the home.	ve the equipment once it is
Just Add Swap	
After you have all of the equipment for the desired service, your Job (Order) is co	implete.
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Service Type     Device Type     Service Type     CS#     Partice       Coldrar FDRG     Howerbalk Windows 2000(11)     - </td <td></td>	
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	Summary Profile Alarms Eve	ents Jobs Equipment Actions Act	stivities					
	Equipment Informatio	n						
	Service Type	Device Type	Serial Number	CS#	Profile			
	Collular PERS	Assure (0)	Select	<ul> <li>℃ CAAS-TII14</li> </ul>	× 8	Û		
	Mobile PERS	On The Gu (1)	-	¥ CA01-95959	× 8	B		
	Select ~	Select ~ Select	✓ Select	Create now				
( a	Once you select Submit a popup warning appears stating that the action cannot be reve and asking for confirmation to continue							
			Warning This action cannot be r you want to continue? Cancel Continue	eversed. Are you sure				
S	Select "Cancel" if you need to make revisions or "Continue" if you want the edit to be processed							
Þ	A second pop-up will appear if you have only made edits to the profile							
Plan			Warning		٦ C			
		· · · · · ·	) warning Only profile data will be	undated Proceed?				
osts			Unity profile data will be	updated. Proceed?				
2313			No Yes					
					4			
s	Select Yes if you want to continue with only edits to profile or No if you want to return a edits to the equipment							
	The edit(s) are sent directly to Lifeline's platform and once the changes have been acce							
E	he edit(s) are sent	and the updates are in the platform there are two popup messages that appear indicati						
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Note: After the Loading completed for CarePlan notification is received, the information has
been loaded into Lifeline's CRM. If there is any delay, you can confirm the status by navigating
to the <i>Care plans &gt; List</i> 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 <i>Completed</i> to review successful Change Request
submissions.