

Partner Portal Release Notes (October 2024)

Below is a list of added/updated functions in the new Partner Portal release for October 2024

Care Plan – Affiliations

A section has been added to the Care Plan form for programs that have state-funded members. For more information, please see the document *Care Plan Tab*

Sites – Changes History

A new tab has been added to the main Site tab to display an audit history of the change requests. Please see the document *Sites Tab*.

Care Plan – Installation Comment

A section has been added to the Care Plan form to add notes for work orders as applicable. This function is only relevant if HSRs receive direct work orders from Lifeline's systems. Please see the document *Care Plan Tab*.

Care Plan – Household Warnings

The Household Warnings field has been added to the Care Plan Change Request form to make updates. Please see the document *Care Plan Tab*.

Agencies

A tab has been added to manage primary care physicians and hospitals related to individual sites. Please see the document *Agencies Tab*.

Users and Offices

A new tab has been created to manager user accounts and associated office (program code) details. This functionality is locked behind an Office Administrator role. Please see the documents *Partner Portal – Users Tab* and *Offices Tab*.

CPA Printing Update

We have added a Household Warnings section to printed CPA forms and a Date/Time stamp for when the form was printed. Please see the document *Sites Tab*.

Care Plan – Additional Responder Addresses

A new "Add Address" field has been added to the Care Plan form to add any alternate addresses for Responders/Notifies associated to the Site. Please see the document *Care Plan Tab*.

Sites Tab – Addresses (Alternate Addresses)

A new tab has been added to the Sites to save alternate addresses for a Site as applicable. Please see the document *Sites Tab*.

Care Plan – Saving Care Plan templates

Office Administrators now have the option to save Care Plan templates. This function will allow certain fields to be pre-populated based on business needs. These are saved from the Care Plan tab and managed through the Offices tab. Please see the documents *Care Plan Tab* and *Offices Tab*.

Misc Updates

Below is a list of some miscellaneous updates that were implemented:

- Sub Service Notes: The Subscriber Services Notes area has been removed. The affiliations function should now be used for state-funded services.
- Site Filtering: The Site tab has been updated to sort by First and Last name.
- Gender: A gender option of “Other” has been added.