





























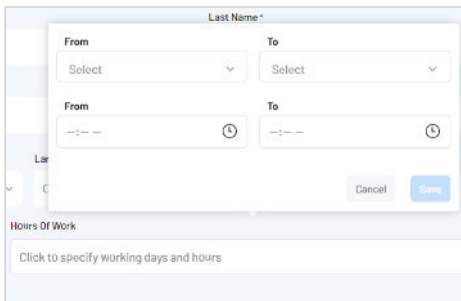


Partner Portal- Sites Tab

In the Sites tab, you can view all sites (subscribers) within your program. You can click the view action to see site detail, the change request action to make changes to the site (includes equipment replacements or swaps), or the cancel site action to request a cancellation for the subscriber (this will move the active equipment back to your inventory) Additionally, you can click the Printer icon to generate a PDF of the Care Plan Agreement (CPA) to be saved/printed.

Sites

Site Name	Status	CS#	City	Phone	Address	Activation Date	CR Status	Actions
Francette 82BTesting	PI	905711117	Marlborough	5089891234	200 Donald Lynch Boulevard	—	—	  
Jonathan Shapiro	PI	—	Long Island City	8775727742	30-30 47th Avenue	—	—	  
OTG MyConnect	PI	—	Long Island City	2124398891	30-30 47th Avenue	—	—	  
Salma Hidjir	A	—	Marlborough	4164453333	200 Donald Lynch Boulevard	—	—	  
Samir Hidjir	A	1212121212	Marlborough	4164533027	200 Donald Lynch Boulevard	03-09-2024	—	  
Samir Hidjir	PI	—	Marlborough	4164453387	200 Donald Lynch Boulevard	—	—	  
Samir2 Hidjir2	PI	—	Marlborough	4164453387	200 Donald Lynch Boulevard	—	—	  
Test Portal 6	PI	—	Long Island City	2124398891	30-30 47th Avenue	—	—	  
Test Portal 9 / Test Second	PI	—	Long Island City	2124398891	30-30 37th Street	—	—	  
Test Portal5	PI	—	Long Island City	2124398891	30-30 47th Avenue	—	—	  

Section	Detail
1	<p>Sites – view of all sites within the program</p>  <p>Filter – you can filter which site to access by selecting the filter and then putting the field(s) that will get to the desired site(s)</p> <p>Columns in the list</p> <p>Site Name – name on the site (subscriber or in the case of multi-sub household subscriber’s names)</p> <p>Status – status of the Site</p> <ul style="list-style-type: none"> A – active status PI – Pending Install status Can – Cancel status <p>CS # - ID for the equipment</p> <p>City – city address for the subscriber</p> <p>Phone – phone number of the subscriber</p> <p>Address – address of the site</p>

Activation Date – date the Care plan was activated
Actions – view the site detail or enter a change request for the site

Detail Tabs

Go Back



Summary Profile Alarms Events Jobs Equipment Actions Activities Addresses Changes History

Summary – summary of site

Profile – details the information entered from the care plan

Alarms – view of alarms received from the subscriber

Events – view of events for the site, includes alarms and actions taken on the site

Jobs – view of any jobs (orders) executed on the site

Equipment – displays equipment assigned to the site and assignment history

Actions – displays actions that need to be taken on the site including maintenance signals

Activities – displays any activities on the site

Changes History – Displays an audit trail for the change requests related to the Site.

Site Summary – Quick view of the site details.

Go Back Change Request

Summary Profile Alarms Events Jobs Equipment Actions Activities

Site Name	Alyse B2BTesting	CS ID	CAAS-T114
Date of Birth	01-18-1950	Program	20201 HealthCare Services #TT201
		Program Code	20201
		Install date	-
		Cancel date	-
		Status	ACTIVE

Notes

Temporary	-
Main	-
Special	Do not let pets out

[Program Notes](#)

Attached documents

Address

111 Lawrence Street 01702 MA

Contacts

Name	Relation	Responder	Home Phone	Cell Phone	Work Phone
Evan Test	8	Responder-Notify		5085567532	

Equipment

Type	Model	Description	CSID	Serial Number	PHR Freq	Assigned	Expires On
-	ASSURE	Assure	CAAS-T114	-	-	-	-

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Profile – displays the profile information entered for the site through the Care Plan tab.

Go Back Edit Cancel site

Summary Profile Alarms Events Jobs Equipment Actions Activities

1. Common Information

Program Code
HSRs Name
Install Date

2. Site

Residential Street Address

3. Subscriber

4. Responder

5. Site Optional Information

6. Internal Notes

Add reminder

1. Common Information

Common Information

Program Code *
20200 - HealthCare Services #TT200

Install Date
yyyy-MM-dd

HSRs Name
Select

Form Language
English

2. Site

Address

47 Georgetown Drive, Framingham, MA, 01702, USA

Country: USA City: Framingham Postal Code: 01702 Province/Territory: MA Street Name: Georgetown Drive Street Number: 47

Apartment PO Box Cross Street

Directions To Home

lives in the 4 house on the left

Menu to the left allows you to navigate any section of the profile

Edit option allows you to edit/update the profile details

Printer option allows you to generate a PDF of the CPA to be printed

Cancel Site option allows you submit a cancellation request for the Site

Note: After selecting *Cancel Site* the cancellation form will display. The *Cancellation Date*, *Cancellation Reason*, and *Status* are required fields. Clicking *Submit* will prompt the portal to have you confirm that the cancellation request should be submitted.

Cancellation form

Cancellation Date *

2024-04-25

Cancellation Reason *

Too expensive

Status *

Recovered

Comment For Cancellation

Are you sure?

No Yes

Abort Submit

Add Reminder allows you to add a reminder on the site

Alarms – displays alarms received from the site.

Go Back

Change Request

Summary

Profile

Alarms

Events

Jobs

Equipment

Actions

Activities

Filters

Alarm #	Site Name	Alarm	Local Time	Elapsed Time	CS#	System Type
37280	Alyse B2BTesting	Fail Detected AutoAlert	01-03-2024, 12:27 PM	—	901T11115X010824	LB900AT
37270	Alyse B2BTesting	Help Needed PHB	01-03-2024, 12:26 PM	—	901T11115X010824	LB900AT

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Alarm Details

Date And Time	Event	Contact Name	Comment
01-03-2024, 12:27 PM	Fail Detected AutoAlert		Manual Entry(Oper EBLA)Listen-In Pending
01-03-2024, 12:27 PM	Alarm Accessed		
01-03-2024, 12:27 PM	Medical Follow Up		Per sub, fell in kitchen, shoulder is in pain, EMS req. Per disp 1234, enrtie.

Alarms section – displays alarms that have been received from the site

Filter – Alarms can be filtered to view desired alarm types

Filters

Start Date

Yyyy-MM-dd

End Date

Yyyy-MM-dd

Event Types

Select

☐ Help Needed PHB

☐ Fail Detected AutoAlert

☐ New Installation

☐ Medical Follow Up

☐ Email Incident to Applicable SC

☐ HSA Dispatched

☐ Complete

☐ Sub: Sibration Help

☐ Alarm Accessed

Alarm Details – select (highlight) an alarm and the details of that alarm will display at the bottom of the page

Events – view of events for the site, includes alarms, disposition of the alarm and actions taken on the site.

Summary Profile Alarms Events Jobs Equipment Actions Activities				
Filters				
Event Date	Alarm#	CS Number	Event	Information
01-06-2024, 02:10 PM		90IT11115X010624	CS# Changed	CS# changed from 90IT111115 to 90IT11115X010624
01-06-2024, 02:10 PM		90IT11115X010624	Système hors's Out of Service	DOS Cat: Xed CS Number
01-06-2024, 02:10 PM		CAAS-T1114	System moved	from HealthCare Services #TT200
01-03-2024, 12:28 PM	37280	90IT11115X010624	Complete	
01-03-2024, 12:28 PM	37280	90IT11115X010624	Email Incident to Applicabl SC	
01-03-2024, 12:28 PM	37280	90IT11115X010624	PFA Dispatched	Not Transported
01-03-2024, 12:28 PM	37280	90IT11115X010624	Sub Situation Help	Per sub, has been assisted, no transport.
01-03-2024, 12:28 PM	37280	90IT11115X010624	Contacted	Notified
01-03-2024, 12:27 PM	37280	90IT11115X010624	Alarm Accessed	
01-03-2024, 12:27 PM	37280	90IT11115X010624	Medical Follow Up	Per sub, fell in kitchen, shoulder is in pain. EMS req. Per disp 1234, enrie.
Page Size 10 < 1 2 >				

The events tab can be filtered to view a specific type of event or an individual event

Filters

Start Date

Yyyy-MM-dd

End Date

Yyyy-MM-dd

Event types

Select

☐ Help Needed PHS

☐ Fall Detected AutoAlert

☐ New Installation

☐ Medical Follow Up

☐ Email Incident to Applicabl SC

☐ PFA Dispatched

☐ Complete

☐ Sub Situation Help

☐ Alarm Accessed

Jobs – list view and detail of job(s) (orders) for the site.


Summary Profile Alarms Events Jobs Equipment Actions Activities									
Jobs Filter									
Job#	Status	Type	Site Name	City	Sys Type	CS#	Created Date	Comp	Actions
500000104	Completed	Installation	Alyse #28 Testing	Framingham	LOGGAT	00111015X010824	12-21-2023, 01:36 PM	12-21-2023	

Equipment		
Type	CS#	Serial Number

Actions	
Action Type	Comment

Comments		
Change Date	Emp	Comment

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LIFELINE USA		 PORTAL USA		English	Lifeline Program
Home	Care plans	Sites	Jobs	Equipment	Actions
Activities	Reports	Dashboards			

Go Back

Job Details

Job #

100001858

Site Name

Thelma Training

Status

Completed

Site Address

123 Main Street, 01238, MA

Type

Service

Sys Type

ASSURE

Assigned To

Create Date

2023-12-11

CS #

THELMA123

Complete Date

2023-12-11

Add comment

Close job

Add reminder

Equipment

Type	CS#	Serial Number
ASSURE	THELMA123	—

Actions

Action Type	Comment

No data found.

Comments

Change Date	Emp	Comment
11/12/2023 15:09	Evan Blanchard	Test

Job Details – view the details of the job (order)

Equipment – details the type of equipment in the job

Actions - details actions added to the job

Comments – view of the comments added to the job

Equipment – details the equipment currently assigned to the site and if appropriate historical assignments.

Go Back Edit Cancel site

Summary Profile Alarms Events Jobs **Equipment** Actions Activities

Assigned Equipment

Type	Model	Description	CSID	Serial Number	PHB Freq	Assigned	Expires On
—	ASSURE	Assure	CAAS-THH4	—	—	02-09-2024	—

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Assignment History

Type	Model	Description	CSID	Serial Number	PHB Freq	Assigned	Unassigned
—	L690AT	CarePartner Model 6900AT	901B45454X011524	—	—	08-16-2024	08-16-2024
—	L690AT	CarePartner Model 6900AT	901T111112X011524	—	—	11-16-2023	01-15-2024
—	L690AT	CarePartner Model 6900AT	901T111115X010624	—	—	11-16-2023	01-08-2024

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[Add reminder](#)

Assigned Equipment – provides the details of the equipment assigned to the site

Assignment History – provides history of any equipment assigned to the site

Edit – Navigates to the Edit Equipment screen to add or remove equipment from the Site

Add reminder – option to add a reminder for the site which will show up in the dashboard

Actions – details actions that need to be executed on the site. Actions could be maintenance signals on the equipment or follow up activities from the Program Services team.

Actions

Action #	Name	Type	Status	Site Name	Create Date	Due Date	Complete Date	Phone	Comment	Actions
100001226	Program Communication	Data Quality	Open	HealthCare Services #11200	01-16-2024	01-16-2024	—	—	Please update protocol, unable to call notifies on every signal.	
100000958	Program Communication	Data Quality	Open	HealthCare Services #11200	01-15-2024	01-15-2024	—	—	Please update address to valid address 111 Lawrence St, Framingham MA 01702	
100000940	Program Communication	Data Quality	Open	Alyse B2B Testing	01-15-2024	01-15-2024	—	5088001206	Please reach out to Alyse @ 5085556874 to swap from 906FD to 906 PHB.	

Action# – action number assigned by CRM

Name – name of action

Type – category of action

Status – status of action

Site Name – name of the site for the action

Create Date – date the action was created

Due date – date set for the action to be completed

Phone – phone number to contact

Comment – details of what action needs to be taken

Activities – if a subscriber calls into the service teams and they document the call, an activity will be added to this tab

Activities								
Type	Activity	Date	Program Code	Site	Caller	Completed	Comment	Actions

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Type – category of interaction

Activity – what activity took place during the interaction

Date – date of call

Program Code – program code for the subscriber’s program

Site – name on the site (household)

Caller – name of the person who called

Completed – status of the activity

Comment – summary of the call

Actions – any actions that need to be taken

Addresses – If a subscriber has an alternate address that needs to be referenced, the *Addresses* tab can be utilized to add any alternate address.

Go Back									Cancel site	
Summary	Profile	Alarms	Events	Jobs	Equipment	Actions	Activities	Addresses	Changes History	
Addresses									+ Add address	
Name	Type	Address	Attention	City	Zip Code	Province	Country	Phone	Comment	Actions
Alternate Ship...	SH	200 Donald Ly...		Marlborough	01752	MA	US		–	

Select the **+ Add address** button to pull up the *New address* window

New address

Residential Street Address

CA ☐ US ☒

111 Lawrence Street, Framingham, MA 01702, US

Country: US City: Framingham Postal code: 01702 Province/Territory: MA Street name: Lawrence Street Street number: 111 Manual edit

Apartment PO Box Attention

Name * Type * Phone

Nancy Test Shipping

Comment

Cancel Add




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Inputting the address is similar to the Care Plan creation. There are two additional fields that are required:





- Name: The name associated to the address.
- Type: The alternate address type (currently only Shipping is available)

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Changes History – If a change request is processed for an account, the Changes History tab will display the date/time, type, and user history for the request.

Summary Profile Alarms Events Jobs Equipment Actions Activities Addresses Changes History							
ID	Type		Date	Created By	Submitted By	Completed By	Actions
13747		✓	09-09-2024 10:10 AM	Samir Hidjir	Samir Hidjir	Samir Hidjir	
444		✓	01-04-2024 09:24 AM	Lifeline 200	Lifeline 200	—	

Clicking on a specific entry will display the change history


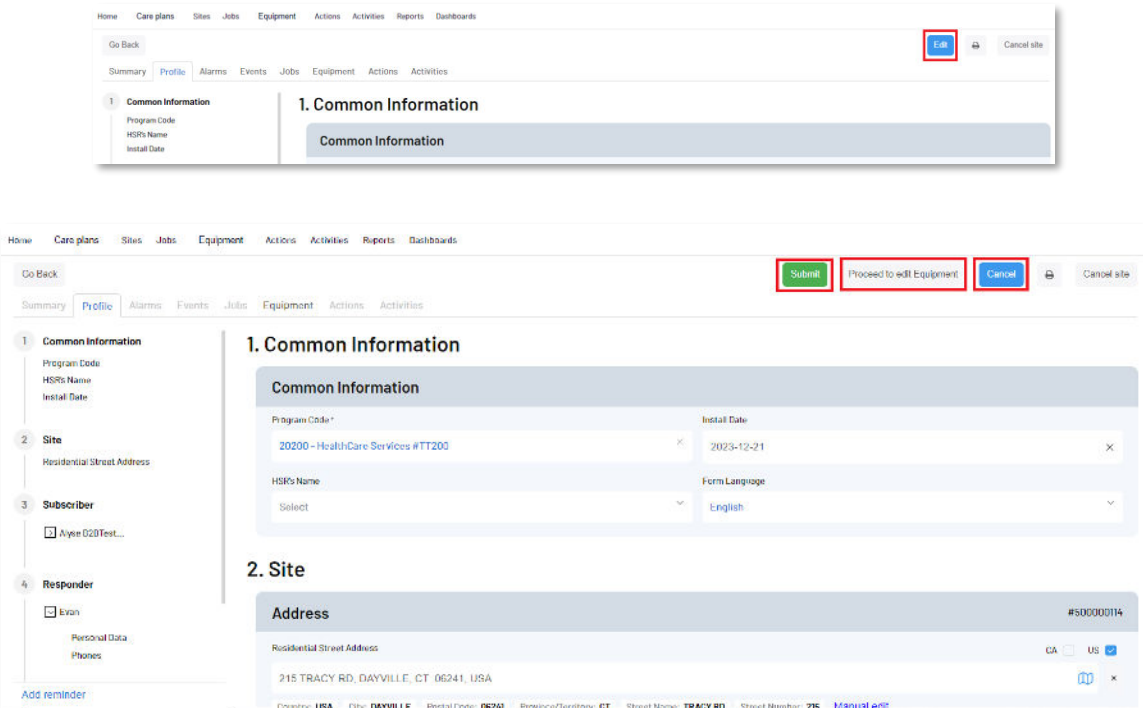

Summary Profile Alarms Events Jobs Equipment Actions Activities Addresses Changes History							
ID	Type		Date	Created By	Submitted By	Completed By	Actions
13747		✓	09-09-2024 10:10 AM	Samir Hidjir	Samir Hidjir	Samir Hidjir	
444		✓	01-04-2024 09:24 AM	Lifeline 200	Lifeline 200	—	

Changes

- Site address: country
USA → US
- + Equipment: LDL, DT1000

Click the clipboard magnifying glass icon next to the entry to display the specific Care Plan Change Request.

Site Actions – Change Request

Section	Detail																		
1	<p>Change Request – use the Change Request function (Edit) to update the site information or change equipment. The Change Request tab has a similar format to the Care Plan creation tab. The edit function can be accessed from the main Site list or the Profile tab of an individual Site:</p> <div> <div> <p>Sites</p> <table> <tr> <th>Site Name</th><th>Status</th><th>CS#</th><th>City</th><th>Phone</th><th>Address</th><th>Activation Date</th><th>CR Status</th><th></th></tr> <tr> <td>Alyse R2BTesting</td><td>A</td><td>CAAS-T1114</td><td>DAYVILLE</td><td>5089881206</td><td>215 TRACY RD</td><td>12-21-2023</td><td>–</td><td></td></tr> </table> </div> <div>  </div> </div> <p>Change Request – Make the appropriate change(s) and use the buttons in the top right to help navigate, submit, or cancel the request</p> <ul style="list-style-type: none"> • Submit: Submits the request to be automatically loaded into Lifeline’s CRM • Proceed to edit Equipment/Profile: Toggles between editing profile information or equipment details • Cancel: Cancels the current change request. 	Site Name	Status	CS#	City	Phone	Address	Activation Date	CR Status		Alyse R2BTesting	A	CAAS-T1114	DAYVILLE	5089881206	215 TRACY RD	12-21-2023	–	
Site Name	Status	CS#	City	Phone	Address	Activation Date	CR Status												
Alyse R2BTesting	A	CAAS-T1114	DAYVILLE	5089881206	215 TRACY RD	12-21-2023	–	