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.

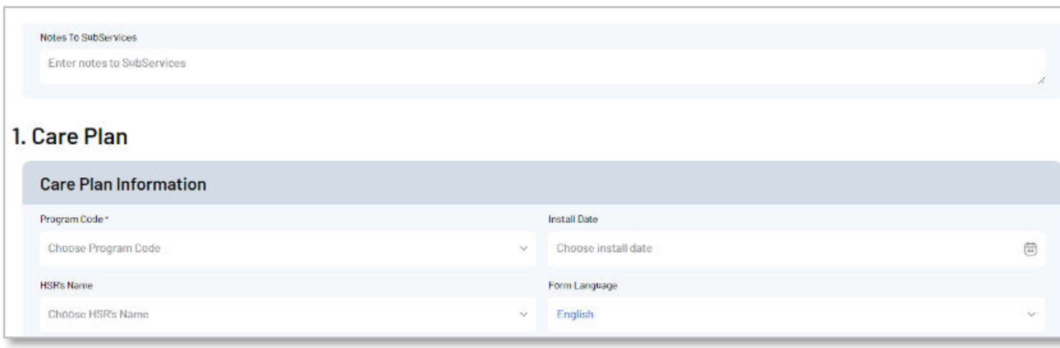
Care Plan

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)

Note: If a subscriber is state-funded, reach out to Program Services after submitting the Care Plan request to ask that they add the MRN/State-Funded information to the record.



Notes to SubServices – This field is no longer in use.

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

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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

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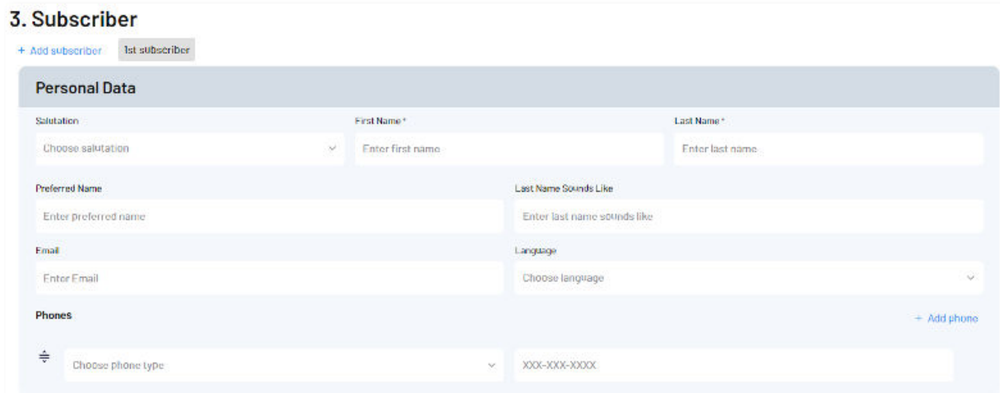
Subscriber Details – Enter subscriber details as appropriate. Ability to add additional subscriber to the site. * indicates mandatory fields.



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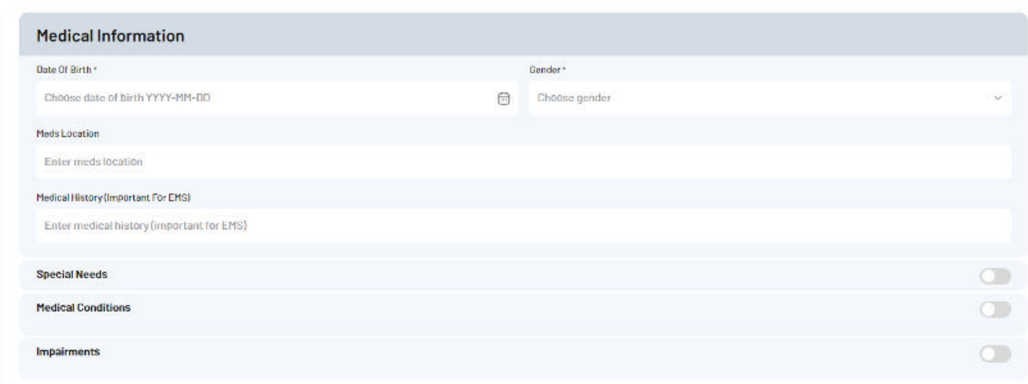
Medical Information – enter the subscriber medical information. * indicates mandatory fields.



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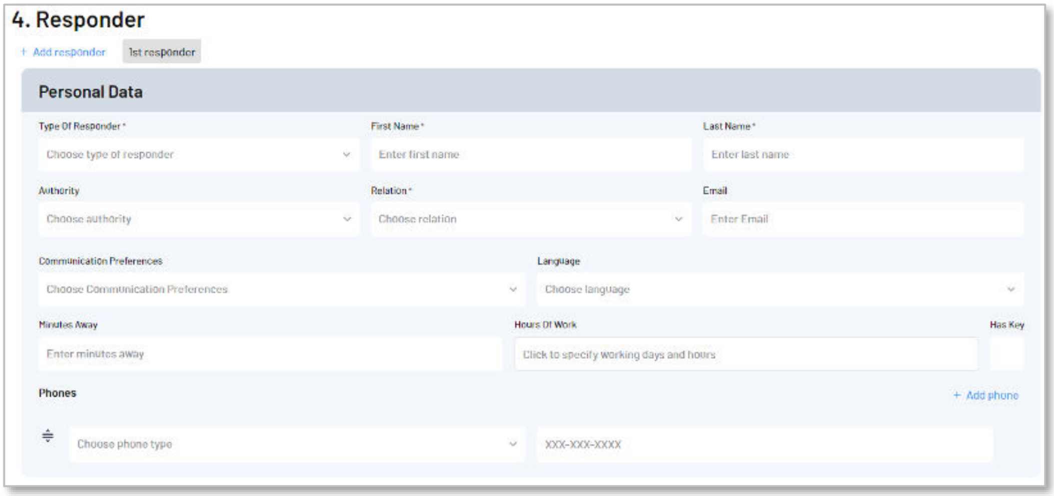
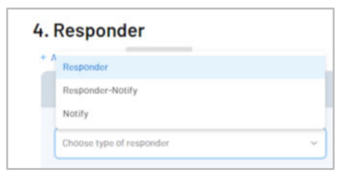
5	**Responder Details** – enter the subscriber's responders

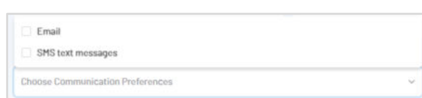


Type Of Responder – select appropriate responder type. Responder – Notify would be selected for someone who can be a responder and does wants to be notified of any incidents. Notify would be selected for someone who is not a responder but does want to be notified of incidents.

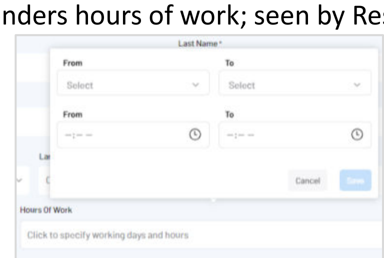


First Name – enter the first name of the responder
Last Name – enter the last name of the responder
Authority – enter the type of authority the responder should have. This is relevant to Away Service and Administrator on the account

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

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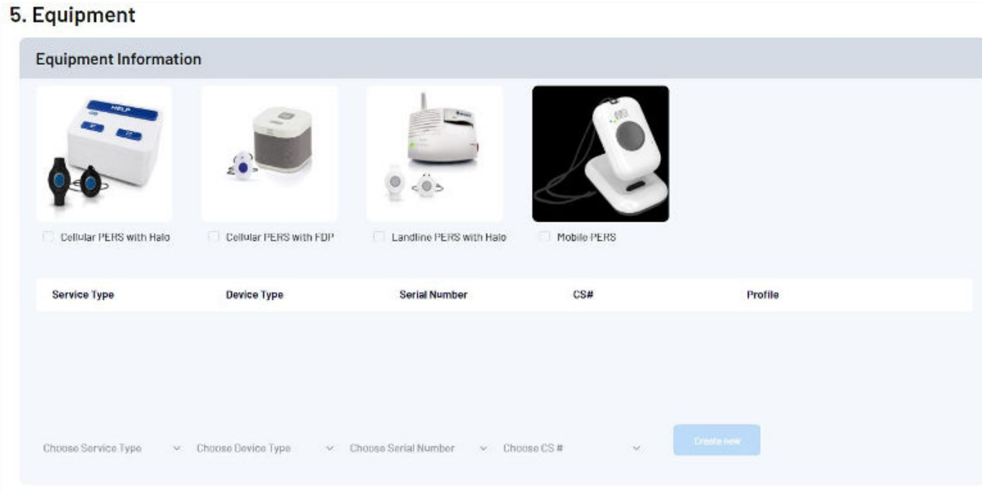
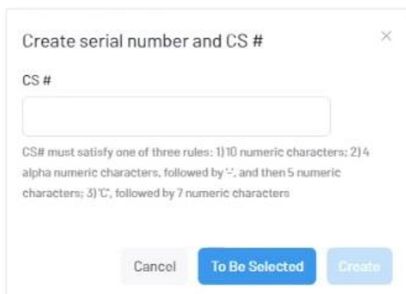
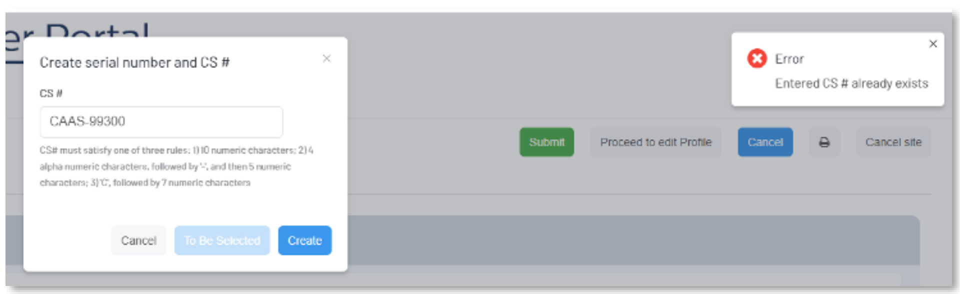
Equipment Information – select the equipment for subscriber. In this section you can select equipment from inventory, add a Serial Number or CS# if the inventory is not loaded. Another option is to select the service and indicate that the device will be selected later.



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



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

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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

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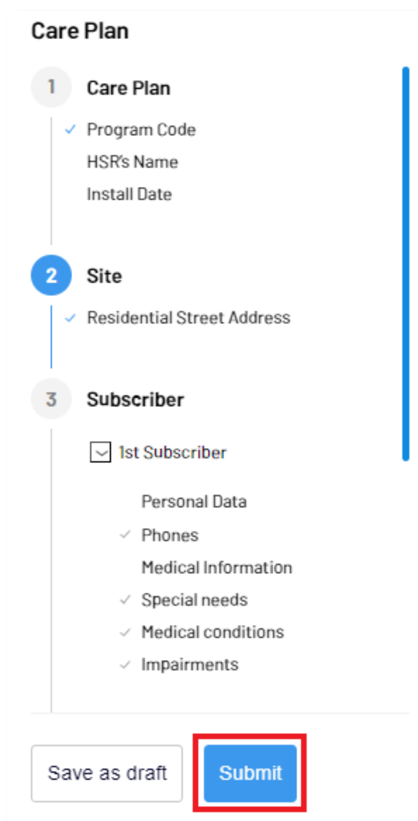
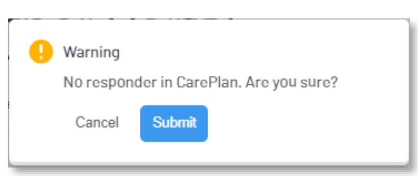
After all relevant information is filled out, press the *Submit* button on the left side of the screen



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



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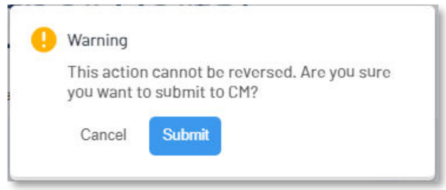
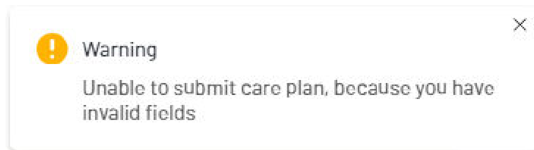
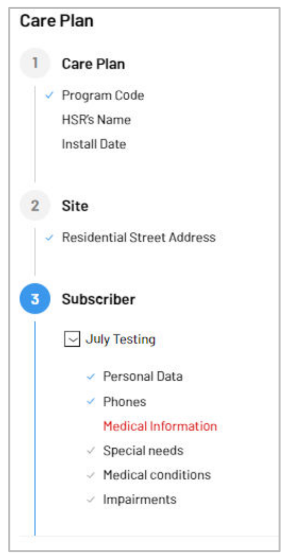
The system will advise that the submission will be final and the data will be loaded into Lifeline's CRM.



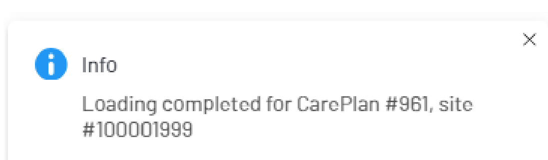
Note: If there is any required information missing, you will receive an error message and the left side of the screen will highlight the fields missing. Update the missing fields and submit again.





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

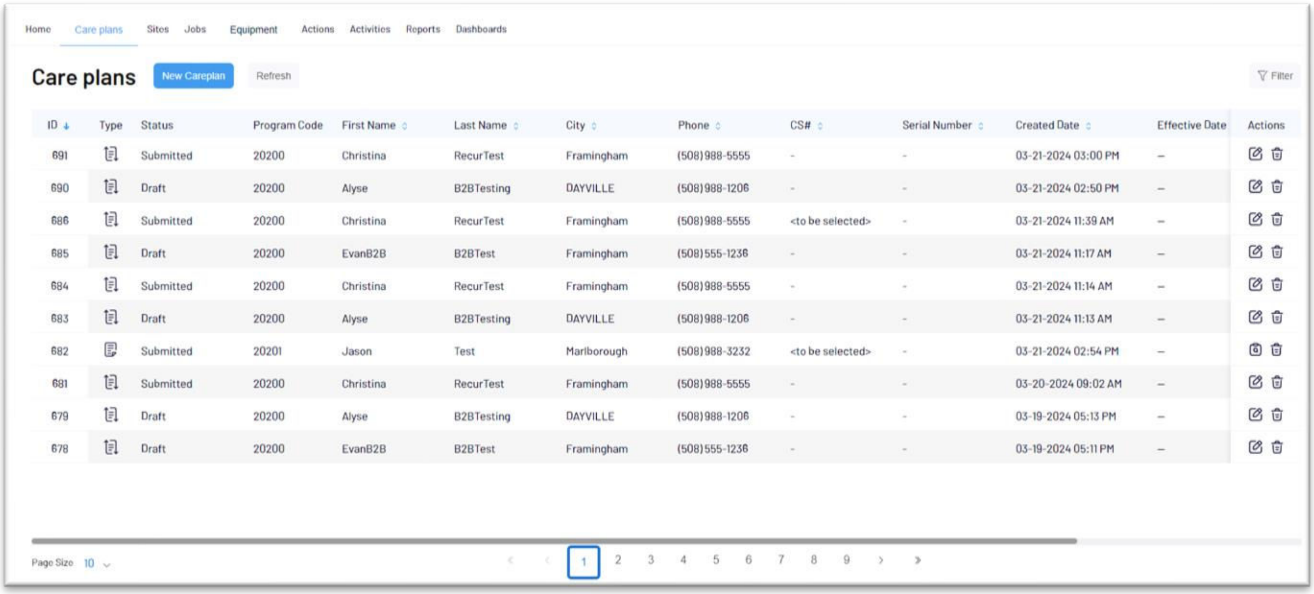
The Care Plan submission will now be loaded into Lifeline's CRM and you will see notifications indicating that the loading is completed



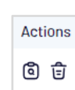
Note: If the *Loading completed for CarePlan* notification does not display or there is a delay, navigate to the *Care plans > List* tab to review the status. If the status indicates *Not Completed* then Program Services will need to review any issues. Successfully loaded Care Plan requests are automatically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

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.



Section	Detail

1	**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
	    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.
	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.