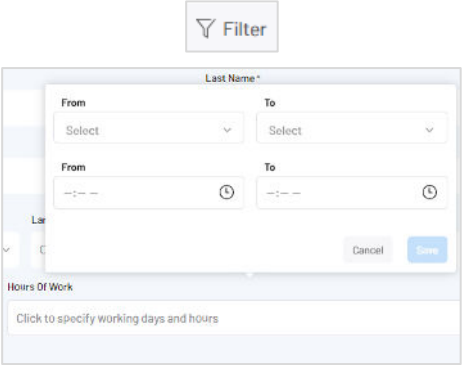# Partner Portal- Sites Tab

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.
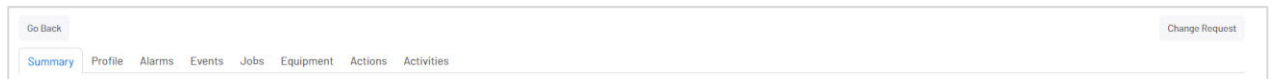
## Sites



| Section | Detail |
|---|---|
| | **Sites** – view of all sites within the program |
| 1 |  **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) <br><br> **Columns in the list** <br><br> Site Name – name on the site (subscriber or in the case of multi-sub household subscriber's names) <br> Status – status of the Site <br>       A – active status <br>       PI – Pending Install status <br>       Can – Cancel status <br> CS # - ID for the equipment <br> City – city address for the subscriber <br> Phone – phone number of the subscriber <br> Address – address of the site |

| | |
|---|---|
| | Activation Date – date the Care plan was activated<br>Actions – view the site detail or enter a change request for the site |
| 2 | **Detail Tabs**<br><br><br><br>Summary – summary of site<br><br>Profile – details the information entered from the care plan<br><br>Alarms – view of alarms received from the subscriber<br><br>Events – view of events for the site, includes alarms and actions taken on the site<br><br>Jobs – view of any jobs (orders) executed on the site<br><br>Equipment – displays equipment assigned to the site and assignment history<br><br>Actions – displays actions that need to be taken on the site including maintenance signals<br><br>Activities – displays any activities on the site |
| 3 | **Site Summary** – Quick view of the site details.<br><br> |

| | |
|---|---|
| | **Profile** – displays the profile information entered for the site through the Care Plan tab. |
| 4 |  |
| | Menu to the left allows you to navigate any section of the profile<br>Edit option allows you to edit/update the profile details<br>Printer option allows you to generate a PDF of the CPA to be printed<br>Cancel Site option allows you submit a cancellation request for the Site<br><br>      **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. |
| |  |
| | Add Reminder allows you to add a reminder on the site |

**Alarms** – displays alarms received from the site.



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

Filter – Alarms can be filtered to view desired alarm types
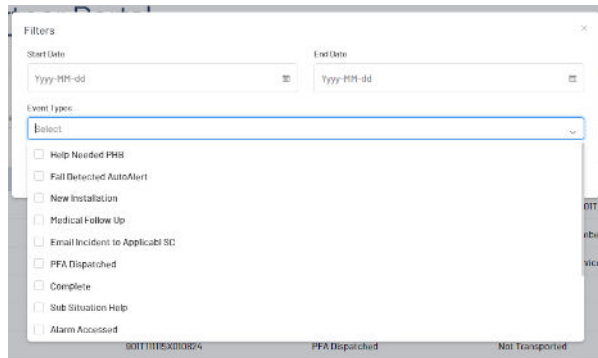


Alarm Details – select (highlight) an alarm and the details of that alarm will display at the bottom of the page

5

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



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

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

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

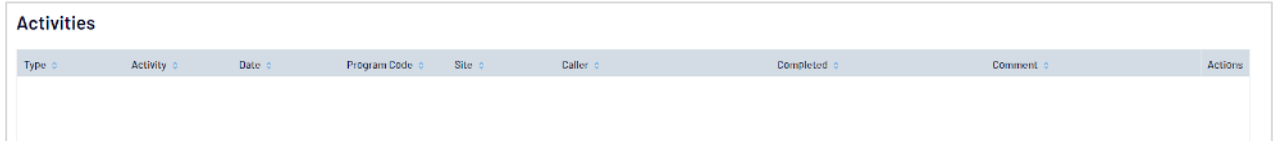| | |
|---|---|
| 8 | **Equipment –** details the equipment currently assigned to the site and if appropriate historical assignments.<br><br><br><br>Assigned Equipment – provides the details of the equipment assigned to the site<br>Assignment History – provides history of any equipment assigned to the site<br>Edit – Navigates to the Edit Equipment screen to add or remove equipment from the Site<br>Add reminder – option to add a reminder for the site which will show up in the dashboard |
| 9 | **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.<br><br><br><br>Action# – action number assigned by CRM<br>Name – name of action<br>Type – category of action<br>Status – status of action<br>Site Name – name of the site for the action<br>Create Date – date the action was created<br>Due date – date set for the action to be completed<br>Phone – phone number to contact<br>Comment – details of what action needs to be taken |

| | |
|---|---|
| 10 | **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 |
|---|---|---|---|---|---|---|---|---|

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
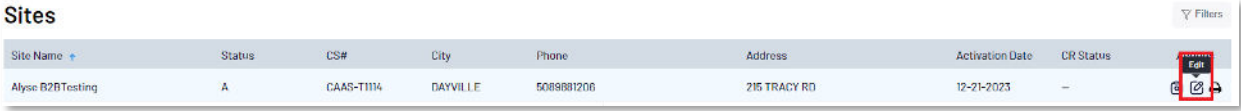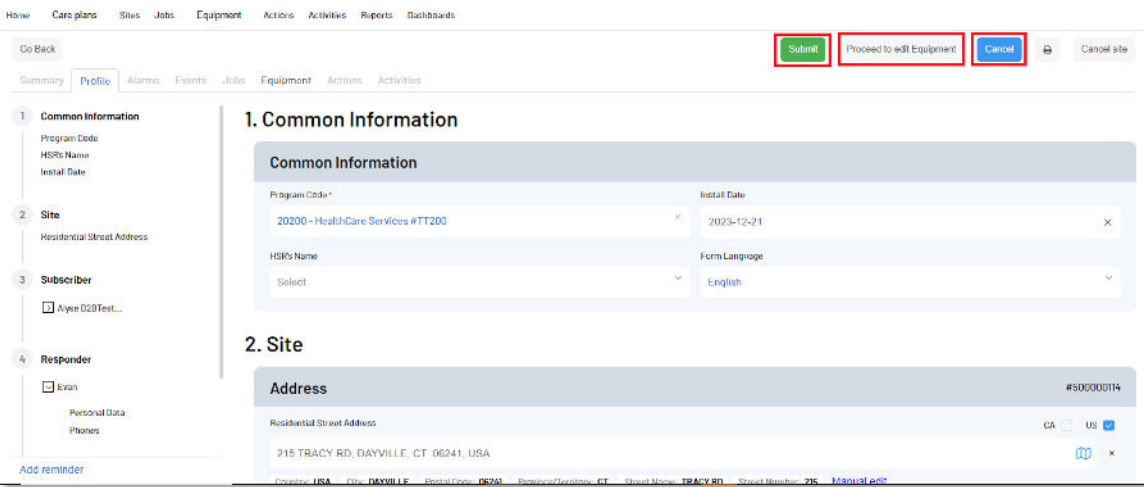Site – name on the site (household)
Caller – name of the person who called
Completed – status of the activity
Comment – summary of the call
Actions – any actions that need to be taken |

## Site Actions – Change Request

| Section | Detail |
|---------|--------|
| 1 | **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:<br><br><br><br>Change Request – Make the appropriate change(s) and use the buttons in the top right to help navigate, submit, or cancel the request<br><br>• **Submit:** Submits the request to be automatically loaded into Lifeline's CRM<br><br>• **Proceed to edit Equipment/Profile:** Toggles between editing profile information or equipment details<br><br>• **Cancel:** Cancels the current change request. |