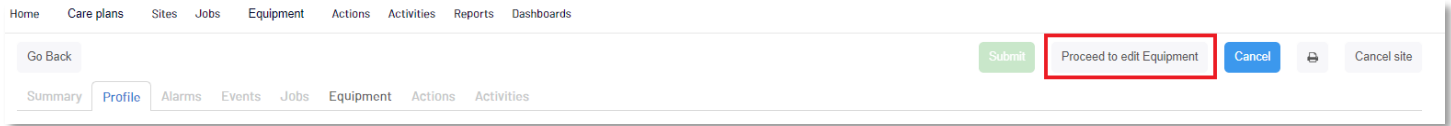


# Partner Portal Care Plan or Edit Process– Equipment

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

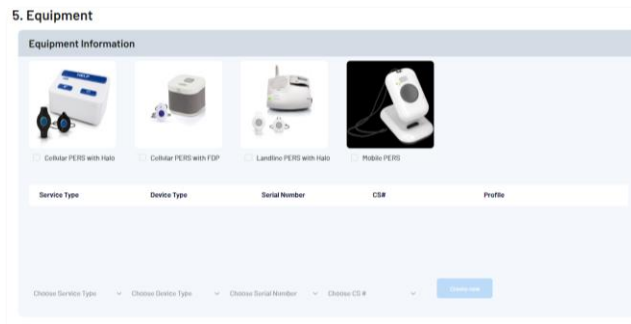


## Entering Equipment to Create a Job (Order)

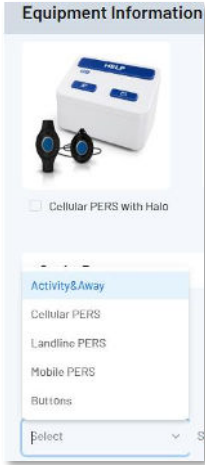

**Equipment Information** – Select the equipment for the subscriber (create a job.)

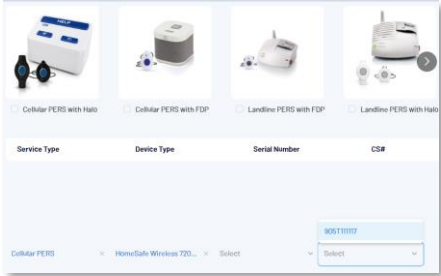
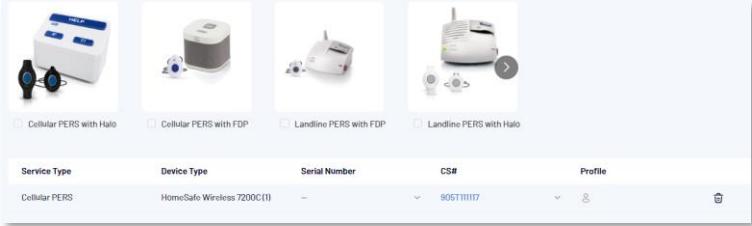
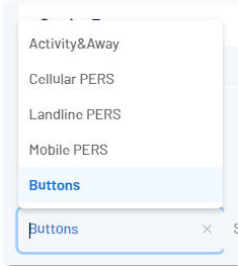
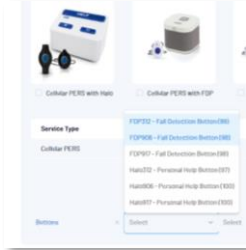
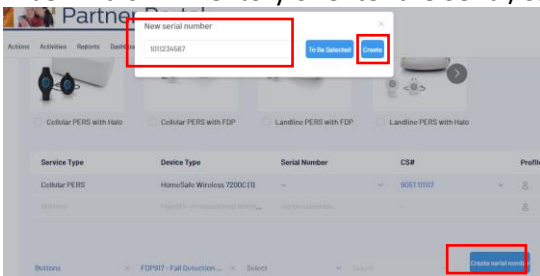
In this section, you can choose on of the following 3 options for selecting the equipment:

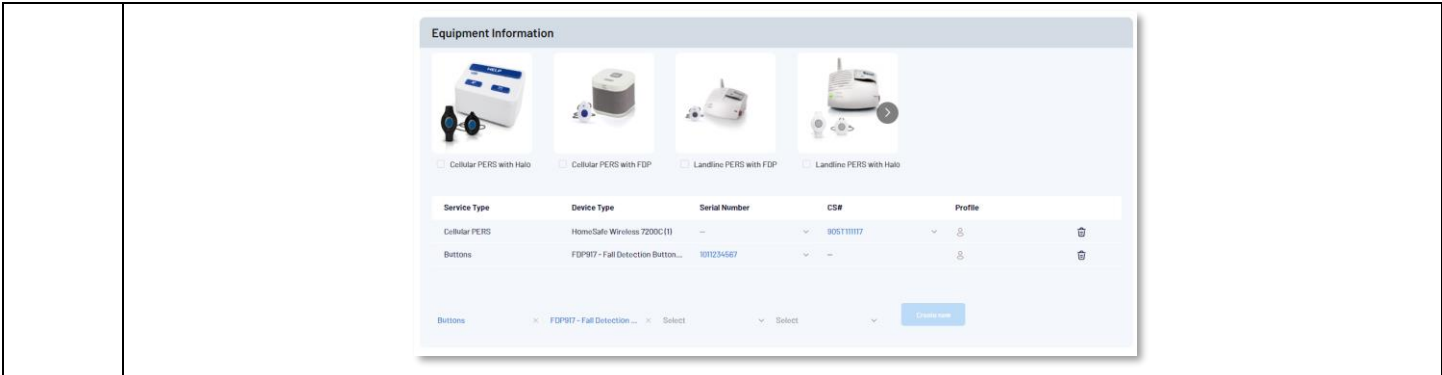
1. Select Serial/CS Number for the equipment from inventory.
2. Add a Serial/CS Number for the equipment if the inventory is not loaded.
3. Select the equipment and indicate that the Serial/CS Number will be provided later.



### Option 1 – Select Serial/CS Number from Inventory

Step	Action
1	<p>Select the type of equipment for the subscriber</p> 
2	<p>Select the <i>Device Type</i></p> 

3	<p>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)</p> 
4	<p>After selected, the Equipment Type with the Serial/CS Number is now in the Job (Order) for the Subscriber.</p> 
5	<p>Add an associated button as applicable.</p> 
6	<p>Select the button type.</p> 
7	<p>Select the Serial Number/CS Number if it is in inventory or enter the Serial/CS Number</p>  <div data-bbox="1149 1430 1393 1514" style="border: 1px solid black; padding: 5px;"> <p>Enter the Serial/CS # and then click Create</p> </div> <div data-bbox="1149 1570 1458 1675" style="border: 1px solid black; padding: 5px;"> <p>Select Create Serial number if there is no serial number to select from drop downs</p> </div> <p>After you have all of the equipment for the desired service, your Job (Order) is complete.</p>

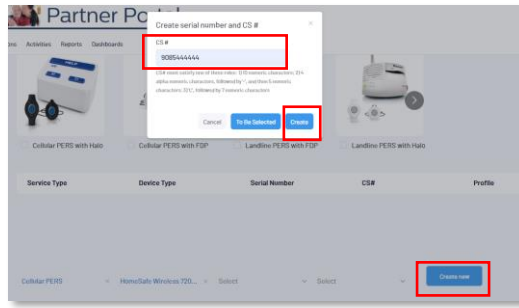


**Option 2 – Add a Serial/CS Number For the Equipment if the Inventory is not Loaded**

Step	Action
1	<p>Select the type of equipment for the subscriber</p>
2	<p>Select the <i>Device Type</i></p>

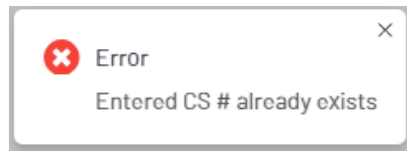
Click *Create new* to enter the Serial Number/CS Number for the equipment

3



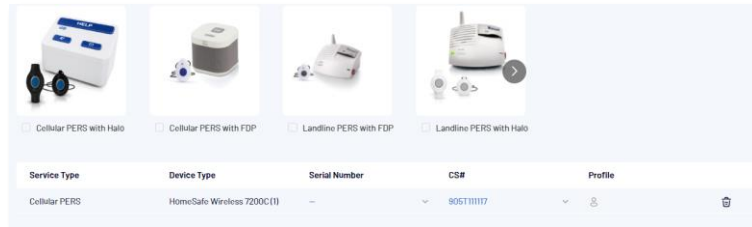
- Enter the Serial/CS Number
- Click *Create*

**Note:** If the Serial/CS Number is already assigned to another Site, you will receive an error message indicating the CS# already exists



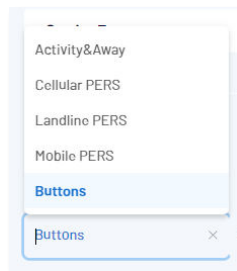
After selected, the Equipment Type with the Serial/CS Number is now in the Job (Order) for the Subscriber.

4



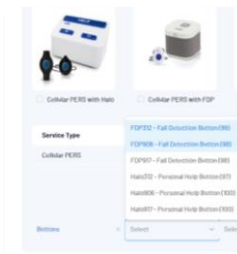
Add an associated button as applicable.

5

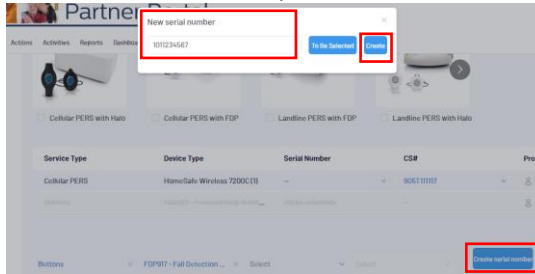


Select the button type.

6



Select the Serial Number/CS Number if it is in inventory or enter the Serial/CS Number



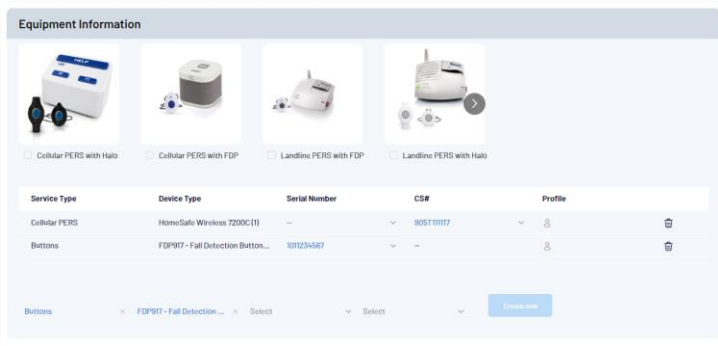
Enter the Serial/CS # and then click Create

Select Create Serial number if there is no serial number to select from drop downs

- **Note:** There is still an option to click <To Be Selected> if the ID information will be called in or selected later.

7

After you have all of the equipment for the desired service, your Job (Order) is complete.



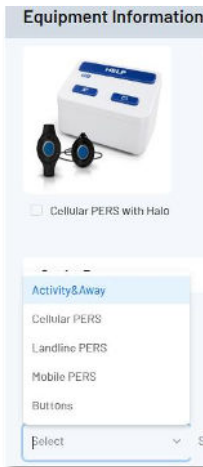
### Option 3 – Select the Service/Equipment and Indicate that the ID Information will be Provided Later

Step

Action

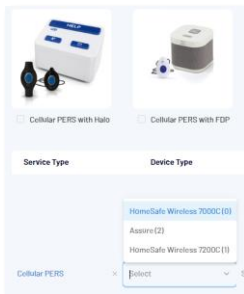
1

Select the type of equipment for the subscriber



2

Select the *Device Type*



3 Indicate that the Equipment will be selected (To Be Selected)

Click To Be Selected

Click Create New

4 Add an associated button as applicable.

5 Select the button type.

6 Select *Create Serial Number* to note that the ID information will be provided later

Click To Be Selected

Select Create Serial number

After you have all of the equipment for the desired service, your Job (Order) is complete.

Service Type	Device Type	Serial Number	CS#	Profile
Cellular PERS	HomeSafe Wireless T200C10		not for selection	
Buttons	FSP707 - Full Detection Button...	not for selection		

## Submit the new Care Plan or Change Request using the Submit button

Home Care plans Sites Jobs Equipment

### Care Plan

- Care Plan**
  - Program Code
  - HSR's Name
  - Install Date
- Site**
  - Residential Street Address
- Subscriber**
  - 1st Subscriber
    - Personal Data
    - ✓ Phones
    - Medical Information
    - ✓ Special needs
    - ✓ Medical conditions
    - ✓ Impairments

Save as draft Submit

### New Care Plan Submissions

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

Warning  
No responder in CarePlan. Are you sure?  
Cancel Submit

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

Warning  
This action cannot be reversed. Are you sure you want to submit to CM?  
Cancel Submit

**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.

Warning  
Unable to submit care plan, because you have invalid fields

**Care Plan**

1 **Care Plan**

- ✓ Program Code
- HSR's Name
- Install Date

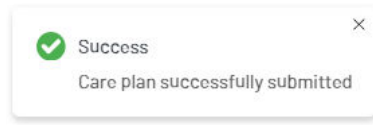
2 **Site**

- ✓ Residential Street Address

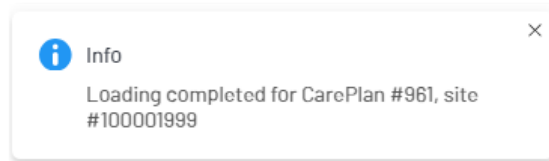
3 **Subscriber**

- July Testing
- ✓ Personal Data
- ✓ Phones
- Medical Information
- ✓ Special needs
- ✓ Medical conditions
- ✓ Impairments

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

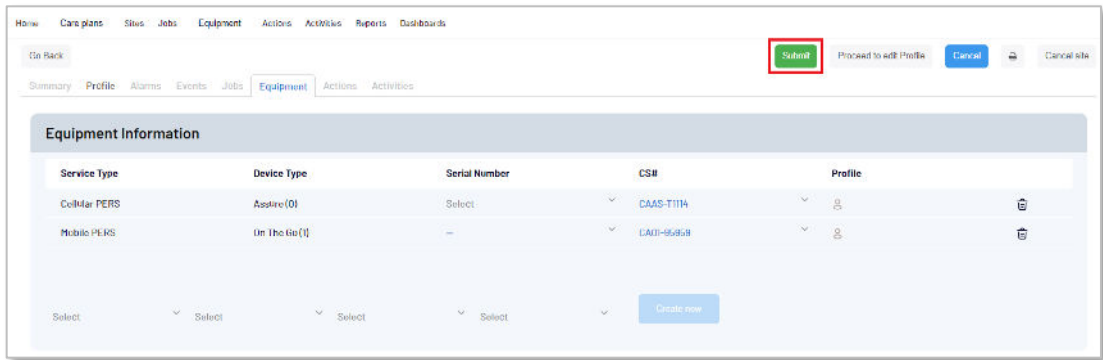


The Care Plan submission will now be loaded into Lifeline's CRM and you will see notifications indicating that the loading is completed

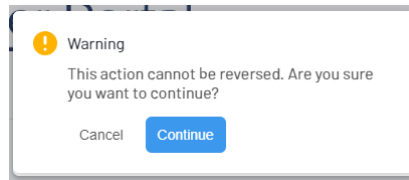


**Note:** If the *Loading completed for CarePlan* notification does not display or there is a delay, navigate to the *Care plans > List* tab to review the status. If the status indicates *Not Completed* then Program Services will need to review any issues. Successfully loaded Care Plan requests are automatically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



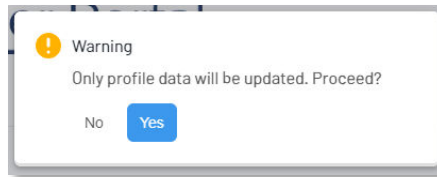


Once you select Submit a popup warning appears stating that the action cannot be reversed and asking for confirmation to continue



Select "Cancel" if you need to make revisions or "Continue" if you want the edit to be processed

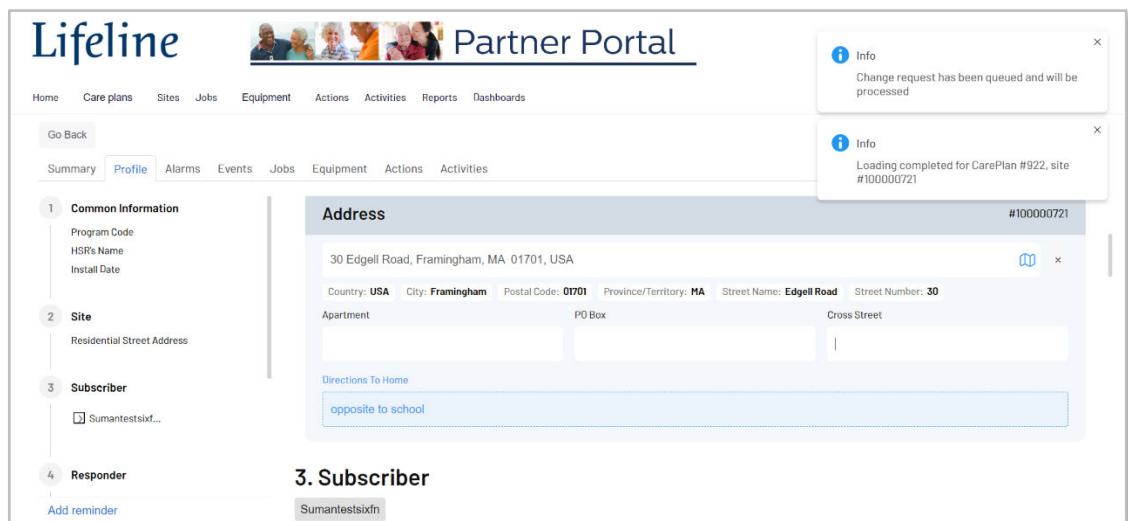
A second pop-up will appear if you have only made edits to the profile



Select Yes if you want to continue with only edits to profile or No if you want to return and add edits to the equipment

The edit(s) are sent directly to Lifeline's platform and once the changes have been accepted and the updates are in the platform there are two popup messages that appear indicating the progress of the edit(s)

**Care Plan  
Change  
Requests**



	<p><b>Note:</b> After the <i>Loading completed for CarePlan</i> 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 <i>Not Completed</i>, 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.</p>
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