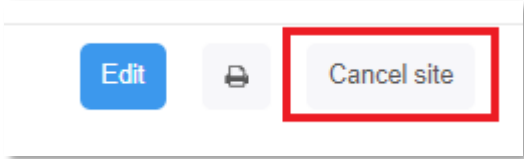
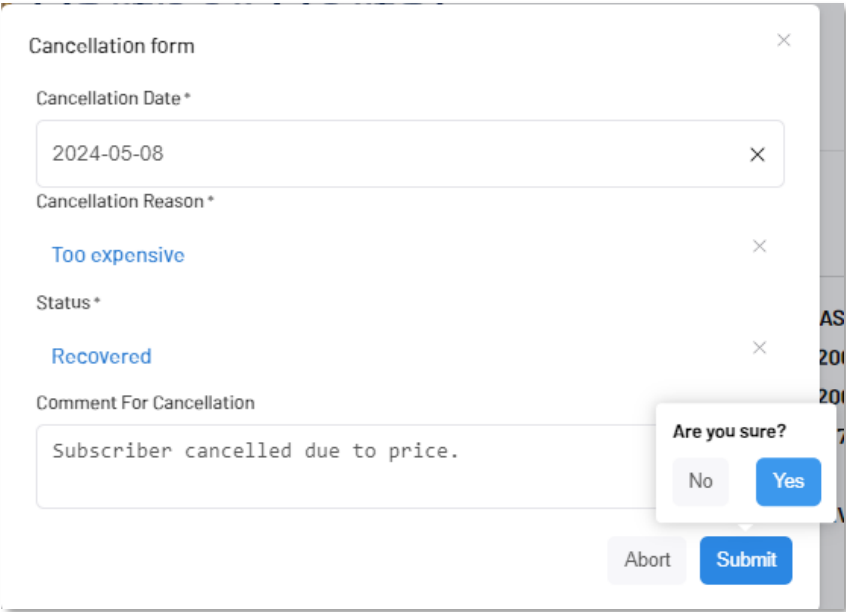


Partner Portal – Cancellations

Cancellations in the Partner Portal can be accessed while viewing an individual Site from the *Site* tab. The option to cancel will always be in the top right while viewing any of the various tabs for an individual Site.

Step	Action
1	<p>From the <i>Site</i> select the <i>Cancel site</i> button at the top right of the screen</p> 
2	<p>Select the appropriate Cancellation Date, Cancellation Reason, and Equipment Status (Equipment recovered, Lost / Damaged, or Not Recovered) There is a field to add an option cancellation comment:</p>  <p>After clicking <i>Submit</i> the system will confirm that you want to cancel the Site. Select Yes to proceed with Cancellation or No if changes need to be made.</p> <p>Note: Cancellations do not appear as a Care Plan request on the Care Plan list. You will see a <i>Portal Cancellation</i> action display in the <i>Actions</i> tab to indicate a cancellation was requested. This Action will remain open until a Lifeline representative has gone in to cancel billing and update the Site status. The equipment will be available in your inventory if the status was labelled as “Recovered”</p>

Home Care plans Sites Jobs Equipment **Actions** Activities Reports Dashboards

Actions

Action #	Name	Type	Status	Site Name	Create Date	Due Date	Complete Date	Phone
100003329	Portal Cancellation	Accounting	Open	Andy Flower	05-08-2024	05-08-2024	--	508182345

Cancellation Criteria: Cancellation requests can only be submitted against Active accounts. If you are trying to cancel an account before it has been activated, contact Program Services to process the request.