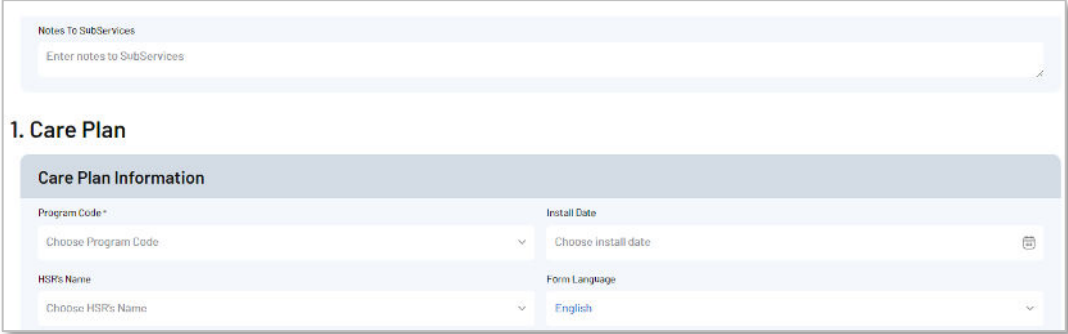



Partner Portal- Care Plan Tab

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.

Section	Detail
1	<p>Adding a new site (subscriber)</p> <p>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.</p>  <p>Notes to SubServices – This field is no longer in use.</p> <p>Care Plan Information – enter information according to program specifics. * indicates a mandatory field</p> <ul style="list-style-type: none"> 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
2	<p>Site – Details the location where the equipment will be utilized. All information will be utilized in the Response Center.</p>  <p>Residential Street Address – enter the subscriber’s street address</p> <p>Apartment - enter the apartment number if appropriate</p> <p>PO Box – This field should not be used. The Site address is intended to send help to the subscriber.</p> <p>Cross Street – enter cross street if available</p> <p>Directions To Home – enter directions to the subscriber’s home if available</p>

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

3

The screenshot shows a web form titled "3. Subscriber". At the top, there are two buttons: "+ Add subscriber" and "1st subscriber". Below this is a section titled "Personal Data" with a light blue header. The form contains several fields: "Salutation" (a dropdown menu with "Choose salutation" selected), "First Name*" (a text input field with "Enter first name" placeholder), "Last Name*" (a text input field with "Enter last name" placeholder), "Preferred Name" (a text input field with "Enter Preferred name" placeholder), "Last Name Sounds Like" (a text input field with "Enter last name sounds like" placeholder), "Email" (a text input field with "Enter Email" placeholder), "Language" (a dropdown menu with "Choose language" selected), "Phones" (a section with a "+ Add phone" button and a field for "Choose phone type" with a dropdown and "XXX-XXX-XXXX" placeholder).

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

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

4

The screenshot shows a web form titled "Medical Information" with a light blue header. The form contains several fields: "Date Of Birth*" (a date input field with "Choose date of birth YYYY-MM-DD" placeholder), "Gender*" (a dropdown menu with "Choose gender" selected), "Meds Location" (a text input field with "Enter meds location" placeholder), "Medical History (Important for EMS)" (a text input field with "Enter medical history (important for EMS)" placeholder), "Special Needs" (a toggle switch), "Medical Conditions" (a toggle switch), and "Impairments" (a toggle switch).

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

Responder Details – enter the subscriber’s responders

The screenshot shows the '4. Responder' form with the following fields and options:

- Type Of Responder:** Choose type of responder (dropdown)
- First Name:** Enter first name (text input)
- Last Name:** Enter last name (text input)
- Authority:** Choose authority (dropdown)
- Relation:** Choose relation (dropdown)
- Email:** Enter Email (text input)
- Communication Preferences:** Choose Communication Preferences (dropdown)
- Language:** Choose language (dropdown)
- Minutes Away:** Enter minutes away (text input)
- Hours Of Work:** Click to specify working days and hours (text input)
- Has Key:** Check box
- Phones:** Choose phone type (dropdown), XXX-XXX-XXXX (text input), + Add phone (button)

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.

The dropdown menu for 'Type Of Responder' shows the following options:

- Responder-Notify
- Notify
- Choose type of responder

5

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

The dropdown menu for 'Authority' shows the following options:

- All Authority
- Administrator
- Away Contact
- Choose authority

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

The 'Communication Preferences' section includes:

- Email
- SMS text messages
- Choose Communication Preferences (dropdown)

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

The 'Hours Of Work' section shows a calendar interface for selecting working days and hours. It includes fields for 'From' and 'To' dates and times, and a 'Click to specify working days and hours' instruction.

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

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.

5. Equipment

Equipment Information

Cellular PEERS with Halo Cellular PEERS with FDI* Landline PEERS with Halo Mobile PEERS

Service Type	Device Type	Serial Number	CS#	Profile
Choose Service Type	Choose Device Type	Choose Serial Number	Choose CS #	Create new

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

6

Create serial number and CS #

CS #

CS# must satisfy one of three rules: 1) 10 numeric characters; 2) 4 alpha numeric characters, followed by '-', and then 5 numeric characters; 3) 'C', followed by 7 numeric characters

Cancel To Be Selected Create

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.

Create serial number and CS #

CS #

CAAS-99300

CS# must satisfy one of three rules: 1) 10 numeric characters; 2) 4 alpha numeric characters, followed by '-', and then 5 numeric characters; 3) 'C', followed by 7 numeric characters

Cancel To Be Selected Create

Error
Entered CS # already exists

Submit Proceed to edit Profile Cancel Cancel site

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

Site Optional Information – opportunity to add additional household information to better support emergency situations.

6. Site Optional Information

The screenshot shows a form titled 'Optional Information' with the following sections and fields:

- Special instructions:** A text input field with the placeholder 'Enter special instructions'.
- Note:** A text input field with the placeholder 'Enter note'.
- Household Hidden Key / Lock Box Location:** A text input field with the placeholder 'Enter household hidden key / lock box location'.
- Entry Code:** A text input field with the placeholder 'Enter entry code'.
- Lock Box Code:** A text input field with the placeholder 'Enter lock box code'.
- Location Of Unit:** A text input field with the placeholder 'Enter location of unit'.

7

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

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

The screenshot shows a 'Care Plan' form with a progress indicator on the left side. The steps are:

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

At the bottom of the form, there are two buttons: 'Save as draft' and 'Submit'. The 'Submit' button is highlighted with a red box.

8

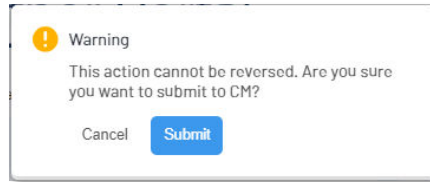
If no responder was selected, you will receive a prompt to confirm you want to submit without a responder

The screenshot shows a warning dialog box with the following text:

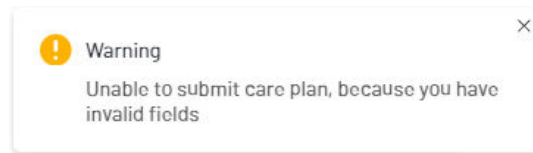
Warning
No responder in CarePlan. Are you sure?

Buttons: Cancel, Submit

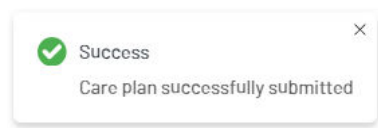
The system will advise that the submission will be final and the data will be loaded into Lifeline's CRM.



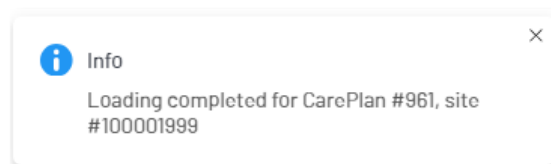
Note: If there is any required information missing, you will receive an error message and the left side of the screen will highlight the fields missing. Update the missing fields and submit again.

A vertical form titled "Care Plan" with a progress indicator on the left. Step 1 "Care Plan" is completed, showing "Program Code", "HSR's Name", and "Install Date". Step 2 "Site" is completed, showing "Residential Street Address". Step 3 "Subscriber" is the current step, showing "July Testing" (unchecked), "Personal Data", "Phones", "Medical Information" (highlighted in red), "Special needs", "Medical conditions", and "Impairments" (all checked).

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.

ID	Type	Status	Program Code	First Name	Last Name	City	Phone	CS#	Serial Number	Created Date	Effective Date	Actions
691		Submitted	20200	Christina	RecurTest	Framingham	(508)988-5555	-	-	03-21-2024 03:00 PM	-	
690		Draft	20200	Alyse	B2BTesting	DAYVILLE	(508)988-1206	-	-	03-21-2024 02:50 PM	-	
686		Submitted	20200	Christina	RecurTest	Framingham	(508)988-5555	<to be selected>	-	03-21-2024 11:39 AM	-	
685		Draft	20200	EvanB2B	B2BTest	Framingham	(508)555-1238	-	-	03-21-2024 11:17 AM	-	
684		Submitted	20200	Christina	RecurTest	Framingham	(508)988-5555	-	-	03-21-2024 11:14 AM	-	
683		Draft	20200	Alyse	B2BTesting	DAYVILLE	(508)988-1206	-	-	03-21-2024 11:13 AM	-	
682		Submitted	20201	Jason	Test	Marlborough	(508)988-3232	<to be selected>	-	03-21-2024 02:54 PM	-	
681		Submitted	20200	Christina	RecurTest	Framingham	(508)988-5555	-	-	03-20-2024 09:02 AM	-	
679		Draft	20200	Alyse	B2BTesting	DAYVILLE	(508)988-1206	-	-	03-19-2024 05:13 PM	-	
678		Draft	20200	EvanB2B	B2BTest	Framingham	(508)555-1238	-	-	03-19-2024 05:11 PM	-	

Section	Detail
1	<p>List – Any Care plan that is entered into the portal will be visible as it goes through the stage of completion</p> <p>Columns in the list</p> <p>ID – The number of the Careplan entry</p> <p>Type – hover over the picture symbol and it will show you the type of Care plan entry Care Plan Change Request</p> <p>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.</p> <p>Program Code – Program code for the Care Plan</p> <p>First Name – first name of the subscriber</p> <p>Last Name – last name of the subscriber</p> <p>City – city address for the subscriber</p> <p>Phone – phone number of the subscriber</p> <p>CS # - ID for the equipment</p> <p>Serial Number – serial number for the equipment</p> <p>Created Date – date the Care plan was created</p> <p>Actions – hover over the symbols to see option to view or delete the Care plan</p> <div style="border: 1px solid gray; padding: 5px; width: fit-content; margin-left: auto; margin-right: auto;"> Actions </div>

2

Filter – you can filter the Care Plan to allow quicker access to the Care plan you are working on.

The image shows a 'Filters' dialog box with a close button (X) in the top right corner. It contains the following elements:

- Active Only:** A checkbox that is currently unchecked.
- Name:** A text input field with the placeholder text 'Enter Name'.
- CS Includes:** A text input field with the placeholder text 'Enter CS includes'.
- Field Name:** A dropdown menu with 'Field Name' selected.
- Condition:** A dropdown menu with 'Condition' selected.
- Buttons:** A 'Reset' button and a blue 'Apply' button.