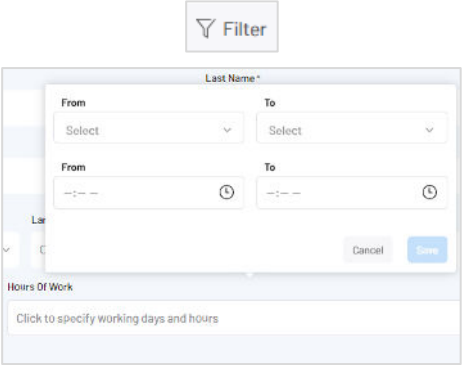


Partner Portal- Sites Tab

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.

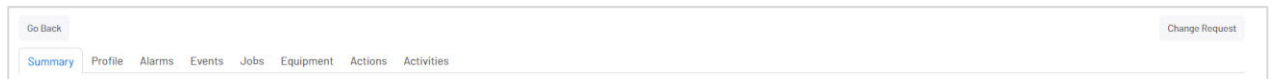
Sites

Site Name	Status	CS#	City	Phone	Address	Activation Date	CR Status	Actions
Francette B2B Testing	PI	905711117	Marlborough	5089881234	200 Donald Lynch Boulevard	-	-	
Jonathan Shapiro	PI	-	Long Island City	8775727742	30-30 47th Avenue	-	-	
OTG MyConnect	PI	-	Long Island City	2124398891	30-30 47th Avenue	-	-	
Salima Hidjir	A	-	Marlborough	4184453333	200 Donald Lynch Boulevard	-	-	
Samir Hidjir	A	1212121212	Marlborough	4184533027	200 Donald Lynch Boulevard	03-09-2024	-	
Samir Hidjir	PI	-	Marlborough	4184453387	200 Donald Lynch Boulevard	-	-	
Samir2 Hidjir2	PI	-	Marlborough	4184453387	200 Donald Lynch Boulevard	-	-	
Test Portal 6	PI	-	Long Island City	2124398891	30-30 47th Avenue	-	-	
Test Portal 9 / Test Second	PI	-	Long Island City	2124398891	30-30 37th Street	-	-	
Test Portal5	PI	-	Long Island City	2124398891	30-30 47th Avenue	-	-	

Section	Detail
1	<p>Sites – view of all sites within the program</p>  <p>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)</p> <p>Columns in the list</p> <p>Site Name – name on the site (subscriber or in the case of multi-sub household subscriber’s names)</p> <p>Status – status of the Site</p> <ul style="list-style-type: none"> A – active status PI – Pending Install status Can – Cancel status <p>CS # - ID for the equipment</p> <p>City – city address for the subscriber</p> <p>Phone – phone number of the subscriber</p> <p>Address – address of the site</p>

Activation Date – date the Care plan was activated
 Actions – view the site detail or enter a change request for the site

Detail Tabs



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Summary – summary of site
 Profile – details the information entered from the care plan
 Alarms – view of alarms received from the subscriber
 Events – view of events for the site, includes alarms and actions taken on the site
 Jobs – view of any jobs (orders) executed on the site
 Equipment – displays equipment assigned to the site and assignment history
 Actions – displays actions that need to be taken on the site including maintenance signals
 Activities – displays any activities on the site

Site Summary – Quick view of the site details.

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Site Name: Alyse B2BTesting
 Date of Birth: 01-18-1950
 CS ID: CAAS-T1114
 Program: 20201 HealthCare Services #TT201
 Program Code: 20201
 Install date: -
 Cancel date: -
 Status: ACTIVE

Notes

Temporary: -
 Main: -
 Special: Do not let pets out
[Program Notes](#)

Attached documents

Address
 111 Lawrence Street 01702 MA

Contacts

Name	Relation	Responder	Home Phone	Cell Phone	Work Phone
Evan Test	R	Responder-Notify		5085667532	

Equipment

Type	Model	Description	CSID	Serial Number	PHR Freq	Assigned	Expires On
-	ASSURE	Assure	CAAS-T1114	-	-	-	-

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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
- Edit option allows you to edit/update the profile details
- Printer option allows you to generate a PDF of the CPA to be printed
- Cancel Site option allows you submit a cancellation request for the Site

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.

Go Back Change Request

Summary Profile **Alarms** Events Jobs Equipment Actions Activities

Alarms Filters

Alarm #	Site Name	Alarm	Local Time	Elapsed Time	CS#	System Type
37280	Alyse B2BTesting	Fall Detected AutoAlert	01-03-2024, 12:27 PM	–	90111115X010824	L690AT
37270	Alyse B2BTesting	Help Needed PHB	01-03-2024, 12:26 PM	–	90111115X010824	L690AT

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Alarm Details

Date And Time	Event	Contact Name	Comment
01-03-2024, 12:27 PM	Fall Detected AutoAlert		Manual Entry(Oper EBLA)Listen-In Pending
01-03-2024, 12:27 PM	Alarm Accessed		
01-03-2024, 12:27 PM	Medical Follow Up		Per sub, fall in kitchen, shoulder is in pain, EMS req, Per disp 1234, enrt.

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

Filter – Alarms can be filtered to view desired alarm types

Filters

Start Date: Yyyy-MM-dd End Date: Yyyy-MM-dd

Event Types

- Select
- Help Needed PHB
- Fall Detected AutoAlert
- New Installation
- Medical Follow Up
- Email Incident to Applicable SC
- H/A Dispatched
- Complete
- Sub: Sibration Help
- Alarm Accessed

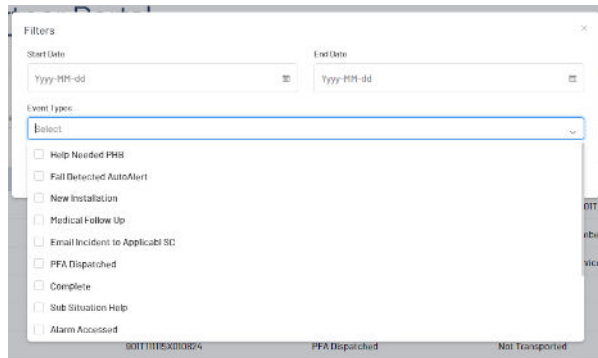
Alarm Details – select (highlight) an alarm and the details of that alarm will display at the bottom of the page

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

Event Date	Alarm#	CS Number	Event	Information
01-08-2024, 02:10 PM		90IT11115X010624	CS# Changed	CS# changed from 90IT111115 to 90IT11115X010624
01-08-2024, 02:10 PM		90IT11115X010624	Système hors' Out of Service	DOS Cat: Xed CS Number
01-08-2024, 02:10 PM		CAAS-T1114	System moved	from HealthCare Services #TT200
01-03-2024, 12:28 PM	37260	90IT11115X010624	Complete	
01-03-2024, 12:28 PM	37260	90IT11115X010624	Email Incident to Applicabl SC	
01-03-2024, 12:28 PM	37260	90IT11115X010624	PFA Dispatched	Not Transported
01-03-2024, 12:28 PM	37260	90IT11115X010624	Sub Situation Help	Per sub, has been assisted, no transport.
01-03-2024, 12:28 PM	37260	90IT11115X010624	Contacted	Notified
01-03-2024, 12:27 PM	37260	90IT11115X010624	Alarm Accessed	
01-03-2024, 12:27 PM	37260	90IT11115X010624	Medical Follow Up	Per sub, fell in kitchen, shoulder is in pain. EMS req. Per disp 1234, enrie.

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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#	Status	Type	Site Name	City	Sys Type	CS#	Created Date	Comp	Actions
500000104	Completed	Installation	Alyse #28 Testing	Framingham	L660AT	00111115X010824	12-21-2023, 01:36 PM	12-21-2023	

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Job #	Site Name
100001858	Theolina Training

Status	Site Address
Completed	123 Main Street, 01238, MA

Type	Sys Type
Service	ASSURE

Assigned To	Create Date
	2023-12-11

CS #	Complete Date
THELMA125	2023-12-11

Equipment Type	CS#	Serial Number
ASSURE	THELMA125	-

Change Date	Emp	Comment
11.12.2023 15:09	Eylan Blanchard	Test

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

Equipment – details the equipment currently assigned to the site and if appropriate historical assignments.

The screenshot shows the 'Equipment' management interface. At the top right, there are buttons for 'Edit' and 'Cancel site'. Below the navigation bar, there are two tables:

Assigned Equipment

Type	Model	Description	CSID	Serial Number	PHB Freq	Assigned	Expires On
-	ASSURE	Assure	CAAS-1114	-	-	02-09-2024	-

Assignment History

Type	Model	Description	CSID	Serial Number	PHB Freq	Assigned	Unassigned
-	L690AT	CarePartner Model B800AT	901B45494X01524	-	-	01-15-2024	01-15-2024
-	L690AT	CarePartner Model B800AT	901T11112X01524	-	-	11-16-2023	01-15-2024
-	L690AT	CarePartner Model B800AT	901T11115X01624	-	-	11-16-2023	01-08-2024

At the bottom left, there is a button labeled 'Add reminder'.

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Assigned Equipment – provides the details of the equipment assigned to the site

Assignment History – provides history of any equipment assigned to the site

Edit – Navigates to the Edit Equipment screen to add or remove equipment from the Site

Add reminder – option to add a reminder for the site which will show up in the dashboard

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.

Action #	Name	Type	Status	Site Name	Create Date	Due Date	Complete Date	Phone	Comment	Actions
100001226	Program Communication	Data Quality	Open	HealthCare Services #11200	01-16-2024	01-16-2024	-	-	Please update protocol, unable to call notifies on every signal.	
100000958	Program Communication	Data Quality	Open	HealthCare Services #11200	01-15-2024	01-15-2024	-	-	Please update address to valid address 111 Lawrence St, Framingham MA 01702.	
100000940	Program Communication	Data Quality	Open	Alyse B2B Testing	01-15-2024	01-15-2024	-	5098001206	Please reach out to Alyse @ 5095556874 to swap from 906FD to 906 PHB.	

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Action# – action number assigned by CRM

Name – name of action

Type – category of action

Status – status of action

Site Name – name of the site for the action

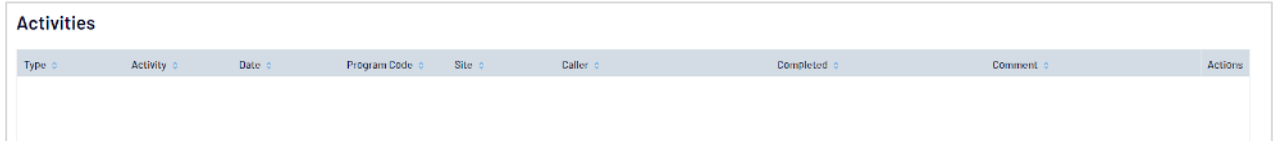
Create Date – date the action was created

Due date – date set for the action to be completed

Phone – phone number to contact

Comment – details of what action needs to be taken

Activities – if a subscriber calls into the service teams and they document the call, an activity will be added to this tab



Type	Activity	Date	Program Code	Site	Caller	Completed	Comment	Actions
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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)

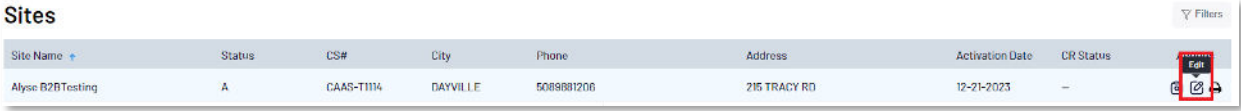

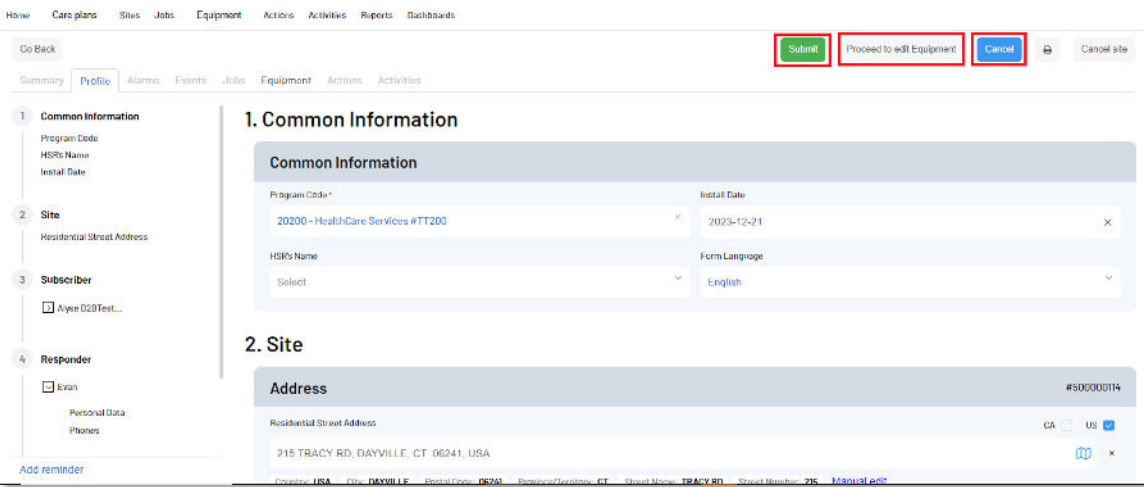
Caller – name of the person who called

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	<p>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:</p>    <p>Change Request – Make the appropriate change(s) and use the buttons in the top right to help navigate, submit, or cancel the request</p> <ul style="list-style-type: none"> • Submit: Submits the request to be automatically loaded into Lifeline’s CRM • Proceed to edit Equipment/Profile: Toggles between editing profile information or equipment details • Cancel: Cancels the current change request.