

Lifeline Partner Portal Release Q & A

Will the address autofill be fixed with this release?

We made adjustments based on your feedback and we are optimistic that you will see an improvement. If you do have an address that updates incorrectly, please utilize the Manual Edit button to update the address. It may be a good idea to validate the address in Google Maps as extra confirmation.

If the address is displaying incorrectly, escalate the issue with the address details to Program Services to review.

Is there a blank care plan I can print somewhere?

Yes, the blank care plan will still be available in the resource library.

Is the equipment update instant?

Yes, it is in real time. The update will generally take under a minute, but at times you will see longer processing times with equipment swaps/replacements as the system does complete extra validation.

Do we still enter police and fire phone numbers?

Police, Fire, and Ambulance numbers are automatically updated via Lifeline's current integrations within our platform.

Do I need to enter the new subscriber information prior to going to the subscriber's home?

It is best to have at least the basic information entered and the equipment that the subscriber wants for service added. You can call Program Services while in the home to update the equipment if it has not already been assigned in order to make a successful test call with the subscriber.

I now see the buttons needing replacement coming through under actions. Will this be a complete list, or do we have to cross reference faxes?

Actions are created for replacement events such as low battery buttons, button/fall detector and Hardware and Software failures. You will also see actions if one of the service team members took a call from your subscriber and felt it best to send an action to address the subscriber's needs.

The faxes you receive include replacement events plus other device related notices such as missed ATCs and failed supervision. You can choose which medium is most efficient to manage the work on replacement events, but the other notices will only be received via fax.

Where is the resource center located?

<https://www.connectamerica.com/2024-lifeline-new-partner-portal-training/>

Will the Partner Portal ever have allow us to do our purchases?

This has been submitted for future enhancements.

The Manual Edit button is greyed out. We're unable to use it.

We made enhancements to the address validation in the portal. You should not find as many addresses that are changed, but if you do the Manual Edit button right after the address should now be functional and allow you update the address.

Any chance updates are done after 5 pm PST?

The Partner Portal is available to you anytime and now adding new Care Plans (subscribers) and changes that you make to the profile or equipment will flow directly to our platform, so you can have more flexibility with your installations.

Is there a time delay of when the information entered will be accessible to us and our installer?

The time delay should be around a minute or two before you see the updates flowing from Partner Portal to our platform. Once you receive confirmation that it was completed you will be able to see the information in portal.

Will the portal have the application available as a pdf so we can take it over the phone without having to an actual application then enter it into portal?

You can always enter the Care Plan into the portal while you are on the phone with a subscriber. You can also print out a completed subscriber CPA and bring it with you to home and fill out additional details. If you can access the portal at the home of the subscriber, you can enter the subscriber's profile details at their home.

Have you solved the issue of taking a returned unit and giving it to another client?

After the release, when you process a cancellation and you indicate in the transaction that the equipment was "recovered" in the drop down, the equipment will be removed from the subscriber's account and placed back into your inventory site. If you indicate the equipment was "Not Recovered" because you have not retrieved the equipment from the subscribers home yet, the equipment will remain assigned to the subscriber.

Do you need both serial number and CS number?

No, you would only have one or the other based on the type of equipment. If it is a 6900, 7200C or OTG you would have a serial number and the Assure along with the newer devices have CS numbers. When you create new it is called CS#, but that could be either based on the equipment.