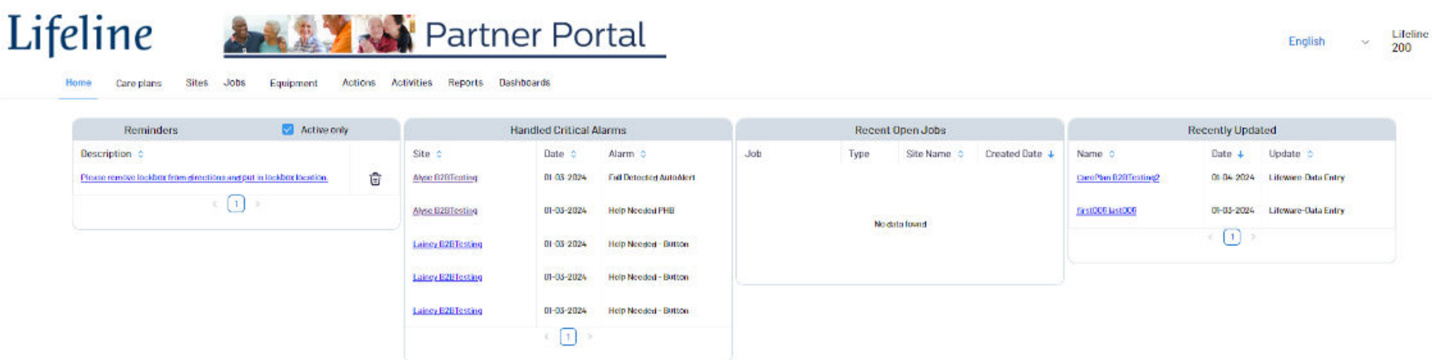
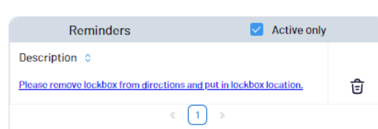
Program Partner Portal Dashboard

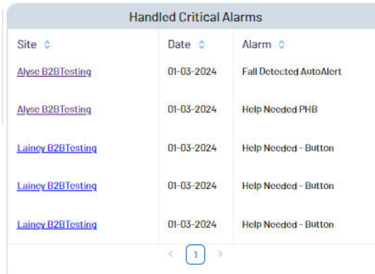
When you log into the portal it will bring you to the dashboard.

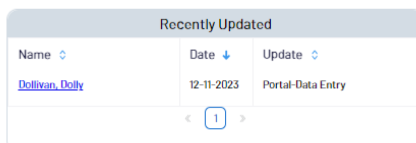
Dashboard Details

To update Subscriber demographic information (Date of Birth, Language, Contact information, Email) take the following actions.



Section	Detail
1	**Navigation Menu**  **Home** – Dashboard **Care Plans** – Option to add new subscribers or update existing subscriber care plan details **Sites** – View existing sites (location of subscriber equipment) **Jobs** – View job status (new install, swap, service) **Equipment** – Inventory of equipment **Actions** - **Activities** - **Reports** – Report on existing sites and inventory Dashboards
2	**Reminders** – The portal allows you to set reminders on any important actions you may need to complete. 

<table>
<tr><td>3</td><td>Handled Critical Alarms – Displays the site name, date of incident and type of alarm. There is a link available for each alarm that allows you to go to the site.

<table>
<tr><th colspan="3">Handled Critical Alarms</th></tr>
<tr><th>Site</th><th>Date</th><th>Alarm</th></tr>
<tr><td>Alyse B2BTesting</td><td>01-03-2024</td><td>Fall Detected AutoAlert</td></tr>
<tr><td>Alyse B2BTesting</td><td>01-03-2024</td><td>Help Needed PHB</td></tr>
<tr><td>Lainey B2BTesting</td><td>01-03-2024</td><td>Help Needed - Button</td></tr>
<tr><td>Lainey B2BTesting</td><td>01-03-2024</td><td>Help Needed - Button</td></tr>
<tr><td>Lainey B2BTesting</td><td>01-03-2024</td><td>Help Needed - Button</td></tr>
</table>
1</td></tr>
<tr><td>4</td><td>Recent Open Jobs – summary of any open jobs.

<table>
<tr><th colspan="4">Recent Open Jobs</th></tr>
<tr><th>Job</th><th>Type</th><th>Site Name</th><th>Created Date</th></tr>
<tr><td colspan="4">No data found</td></tr>
</table></td></tr>
<tr><td>5</td><td>Recently Updated – Presents any sites that with recent updates.

<table>
<tr><th colspan="3">Recently Updated</th></tr>
<tr><th>Name</th><th>Date</th><th>Update</th></tr>
<tr><td>Dollivan, Dolly</td><td>12-11-2023</td><td>Portal-Data Entry</td></tr>
</table>
1</td></tr>
</table>

Updating Contact Information

To Add/Remove or Update Contact Information, take the following steps.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

Response Center: After accessing the *Site* associated to the Subscriber, navigate to the *Contacts* tab (shortcut CTRL + F2)

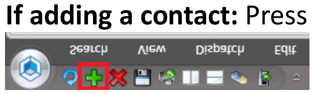
Customer Service: After accessing the *Customer/Site* associated to the subscriber, navigate to the *Cust Site* tab (shortcut CTRL + F1)

On the Customer/Site page, select the *Contacts* tab on the right

- **Result:** The *Contacts* page will open.

</td></tr>
<tr><td>2</td><td>

- **If adding a contact:** Press the green + button in the top left corner or press CTRL + A.

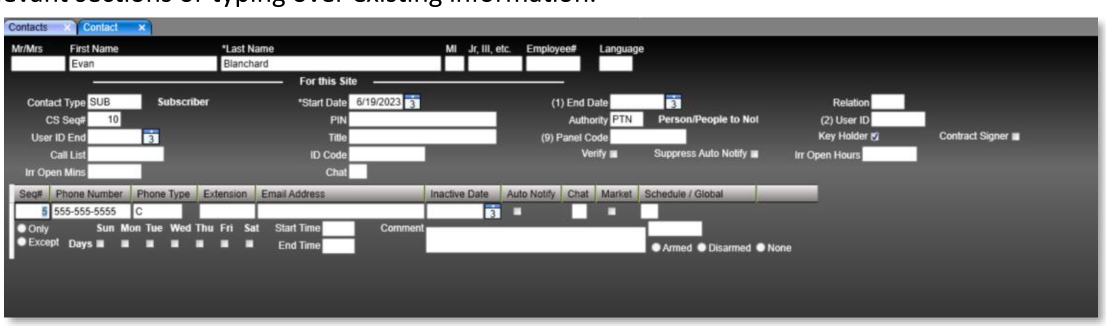


- **If updating or removing a contact:** Double click the contact you wish to update or remove.

Move to step 3.

</td></tr>
<tr><td>3</td><td>

Update the appropriate information on the following screen by adding the information in the relevant sections or typing over existing information.



- **If removing a contact:** Populate the *(1) End Date* field with the date the contact should be removed (type *T* if to populate today's date if removing the day of the call)
- **Contact Type:** Select whether the Contact is a Responder, Notify, Both (Responder-Notify) or a Caregiver (used when the contact is only listed in regards to the My Lifeline application)
- **Note:** If a contact is utilizing My Lifeline, select the Authority of Away Contact (if they are to be notified as an Away Contact), Administrator (If they are to be listed as an admin for My Lifeline) or All Authorities (if they are to be both an Away Contact and an Administrator)

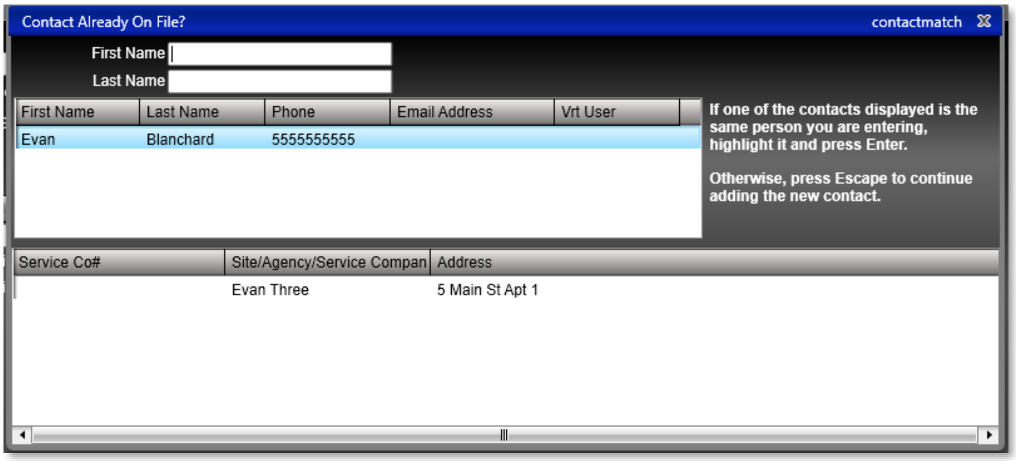
</td></tr>
</table>

	• **Relation:** Select the contact's relation to the subscriber • **Key Holder:** Check this box if the contact is a keyholder. • **Note:** To Add a phone number, click anywhere in the Phone section (e.g. select the existing phone number) and press CTRL + A (or click the + button in the top left corner of MASterMind) and a new line will appear in the Phone Number section. To delete a number, press CTRL + D (or click the red X in the top left corner of MASterMind) while selecting the phone number to be deleted. • **Sequence #:** To re-order the phone numbers or contact order, update the sequence #s to go from lowest to highest in the order you want the numbers or contacts called. For contact order, update the CS Seq# in the top section (e.g. Responder 1 is sequence # 20, Responder 2 is sequence # 30, etc…) For Phone numbers, update the Seq# in the phone number section (e.g. Phone 1 is Seq# 5, Phone 2 is Seq# 10) • **Phone Number Availability:** For contact's that have numbers that are only available at certain times or days, you can navigate to the phone number affected and select either *Only* or *Except* to specify when the number is available (e.g. *Only* with Sun, Mon, and Tue populated will display the phone number only on Sundays, Mondays, and Tuesdays. *Except* with only Sat and Sun selected will display the phone number on weekdays only) Press *Enter* • **Result:** The contact information is updated.

Mirroring Existing Contact Guidelines

MASterMind has a function that will inform you if a contact already exists associated with another Site.

Note: This process should only be followed if the contact is a Front Desk or Hospice. If the contact is any other relation, close the window that displays and enter the information manually.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the Contact entry screen, enter the First Name, Last Name, and Phone Number of the contact that exists in MAS.
Result: The Contact Already on File? Screen will display.</td></tr>
<tr><td>2</td><td>

Review the information displayed to confirm it mirrors the entry you want to link to the current Site.
If the information is valid: Press Enter to save the Contact information. Move to step 3.
If the information is not valid: Close the dialogue box to enter the information manually.</td></tr>
<tr><td>3</td><td>Review the information on the Contact before pressing Enter to save.
Note: Any updates made on this contact will mirror to all related Sites.</td></tr>
</table>