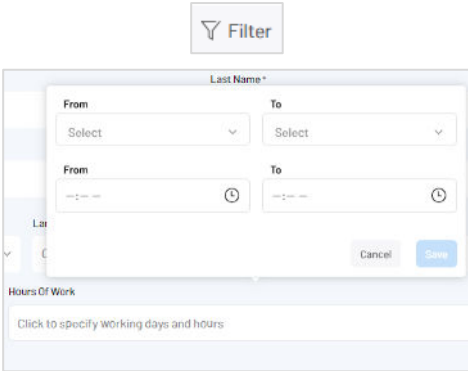# Partner Portal- Sites Tab

In the Sites tab, you can view all sites (subscribers) within your program. You can click the view action to see site detail, or you can click the change request action to make changes to the site (includes equipment replacements or swaps).

Sites

Section	Detail

1	**Sites –** view of all sites within the program
	
	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)
	
	Columns in the list
	
	Site Name – name on the site (subscriber or in the case of multi-sub household subscribers names)
	Status – status of the Site
	       A – active status
	       PI – Pending Install status
	       Can – Cancel status
	CS # - ID for the equipment
	City – city address for the subscriber
	Phone – phone number of the subscriber
	Address – address of the site
	Activation Date – date the Care plan was activated
	Actions – view the site detail or enter a change request for the site

2	**Detail Tabs** Go Back	Change Request Summary Profile Alarms Events Jobs Equipment Actions Activities 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
3	**Site Summary** – Quick view of the site details.

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	8	Responder-Notify		5085567532	

Equipment

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

Page Size 10

|	
4	**Profile** – displays the profile information entered for the site through the Care Plan tab. Menu to the left allows you to navigate any section of the profile Change Request option allows you to edit/update the profile details Add Reminder allows you to add a reminder on the site
5	**Alarms** – displays alarms received from the site.

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

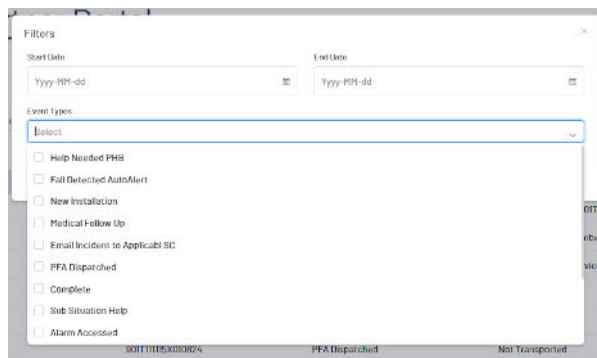Filter – Alarms can be filtered to view desired alarm types
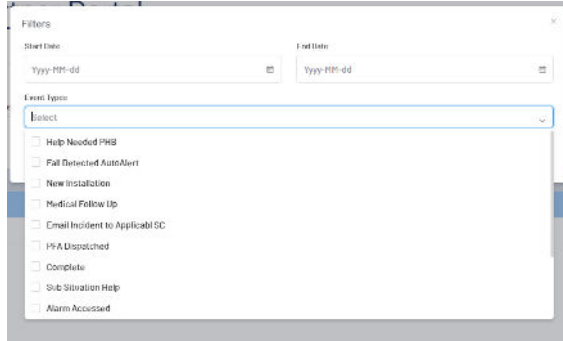
Alarm Details – select (highlight) an alarm and the details of that alarm will display at the bottom of the page

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

The events tab can be filtered to view a specific type of event or an individual event

6

Jobs – list view and detail of job(s) (orders) for the site.

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

8	**Equipment –** details the equipment currently assigned to the site and if appropriate historical assignments. Assigned Equipment – provides the details of the equipment assigned to the site Assignment History – provides history of any equipment assigned to the site Add reminder – option to add a reminder for the site which will show up in the dashboard
9	**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# – 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

| 10 | **Activities –** if a subscriber calls into the service teams and they document the call, an activity will be added to this tab

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	**Change Request –** use the change request to update the site information or change equipment. The Change Request tab has the same format as the add a site option.

Change Request – enter the appropriate change(s) and select Save as draft or Submit once all changes have been made |