

# Guide to CarePartners Connect

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# Preface

The preface contains four items of importance:

- Who this document is for.
- How this help document is organized: what you will find in the guide, and where.
- How to navigate this document.
- A caution, repeated later in the guide, about the confidentiality of subscriber information.

## Audience

This guide is intended for Lifeline program managers who use CarePartners Connect, and for their staff.

## Organization

The *Guide to CarePartners Connect* contains three chapters and two appendices:

- Chapter 1, *Overview*, gives a general summary of Lifeline's online reporting system.
- Chapter 2, *Access*, explains the login process, and contains information about password administration.
- Chapter 3, *Reports*, explains how to open and view the subscriber data that CarePartners Connect makes available.
- Appendix A, *Reference Information*, contains a list of selected procedures, as well as information about system availability and support.
- Appendix B, *Frequently Asked Questions*, contains answers to common questions about CarePartners Connect.

## Navigation

The electronic version of the *Guide to CarePartners Connect* offers three types of navigation tools:

- Table of contents
- Links in the text
- Standard Acrobat navigation tools

You can also print the entire guide in order to use it off line.

### CAUTION

---

CarePartners Connect gives you access to information about a subscriber's medical conditions, hidden keys, home address, and social security number. This information must be safeguarded. Never give access to someone who does not need to know this information.

---

---

# 1. Overview

CarePartners Connect allows you secure access to your subscriber information. To use your account on this system, your Lifeline program and CarePartners Connect must be set up securely. After you submit your Enrollment Form, Lifeline verifies your program information and sets up access for each individual user you requested. If you have any questions about the use of CarePartners Connect, e-mail [CPCservice@Lifelinesys.com](mailto:CPCservice@Lifelinesys.com) or call 800-852-5433. If you are on the staff at a Lifeline program, consult with your program administrator.

Once you receive verification of your user name and password, you can access your subscriber information online. Log in through CarePartners Online or directly at [www.CarePartnersConnect.com](http://www.CarePartnersConnect.com). The subscriber information available to you through CarePartners Connect includes:

- Daily subscriber lists
- Month-to-Date Installation reports
- Month-to-Date Deactivation reports
- A historical record of your program reports for prior months
- Subscriber Care Plans and Case Histories

If you have a question about the information on a subscriber's responder list, or about a recent incident, you have access to real time subscriber information in a Care Plan Agreement and a Case History report. You can obtain this information quickly with CarePartners Connect. Online reporting enables you to:

- Answer subscriber and caregiver questions immediately because you can see care plan and case history information in real time.
- Become more efficient because reports are current. Online reports are searchable and information is immediately available without having to call Lifeline.



### **CarePartners Connect is Easy to Use**

CarePartners Connect has an intuitive and user friendly interface. You can use the system today with no training. The special report window allows you to view, search, save, export, and print your subscriber data. Simply log in and follow the directions on the screen to view standard monthly reports and other subscriber information. If you need more help, please refer to the instructions in this guide.

To see how CarePartners Connect is structured, please refer to the flow chart on page 21, and to the site map on page 70.

### **CarePartners Connect is Secure**

Online reporting gives you access to Lifeline's operational data in a secure environment. The online system gives you the most current and accurate information about your subscribers. As a matter of law and ethics, the confidential information stored and distributed through CarePartners Connect must be secure. You enter the site with a unique user name and password, and you have access only to subscribers within your program. In addition, CarePartners Connect encrypts all data transmissions. For more information about information security, please review the privacy statement available online.

### **Use the *Guide to CarePartners Connect* On or Off Line**

The *Guide to CarePartners Connect* explains how to gain access to the subscriber information available online. It also explains how to work with the reports that CarePartners Connect transmits. You can do the following with the online help document:

- Search for a specific topic.
- Download the help file to your local drive so it is available all the time.
- Print the entire guide.

---

## 2. Access

Chapter 2 explains:

- How to obtain your user name and password.
- How to log in.
- How to change your password.
- What to do if you forget your password.

## How to Enroll

If you are a program manager and have not enrolled in CarePartners Connect:

1. Launch your web browser and go to [www.CarePartnersConnect.com](http://www.CarePartnersConnect.com) or to CarePartners Online. (CarePartners Online requires a user name and a password.)
2. Open the CarePartners Connect login page (Figure 2-1).



**CarePartners connect**  
your subscriber information connection

**Log in to CarePartners Connect**

**Already have a username and password?**  
Enter them now to access CarePartners Connect.

**User Name:**

**Password:**  **Enter**

**Forgot your password?**  
[Get help here](#)

**Has your program enrolled for this service?**  
[Enroll now for CarePartners Connect](#)

**What is CarePartners Connect?**  
[Click here to learn more about the system](#)

**Don't have a user name or password?**  
Please contact your local CarePartners Connect Administrator

For security reasons, if you attempt to log in to the system with the wrong user name and/or password beyond an acceptable number of tries, further attempts to access your subscribers will be denied. If this occurs, please wait to try again.

[Contact Us](#) [Terms & Conditions](#) [Privacy Statement](#) [Enroll Now](#) [CP Online](#) [Help](#)

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**Figure 2-1. Login Page**

3. Click **Enroll now for CarePartners Connect** in the middle of the login page.

A web page that explains how to enroll opens in your browser.

If you work with a Lifeline program and you need access to the online reports in CarePartners Connect, you should speak with your program administrator. Table 2-1 below summarizes some general procedures related to access for program managers and their staff members.

**Table 2-1. Access for Program Administrators and Staff**

Stage of Access	Program Administrators	Staff Members
Enrollment	Submit a program enrollment form that lists each user.	No action required.
First-time login	Receive user names and generic passwords from Lifeline via e-mail. A password change is required during the login process.	Receive a user name and a generic password from your program administrator. A password change is required during the login process.
Subsequent access	Log in with your user name and self-assigned password.	Log in with your user name and self-assigned password.

To get a user name and password after you enroll, e-mail [CPCservice@Lifelinesys.com](mailto:CPCservice@Lifelinesys.com) with complete user information, including:

- User first name
- User last name
- User e-mail address
- Program name
- Program codes

## How To Log In for the First Time

When you log in for the first time, you must do three things as you prepare for routine use of the system:

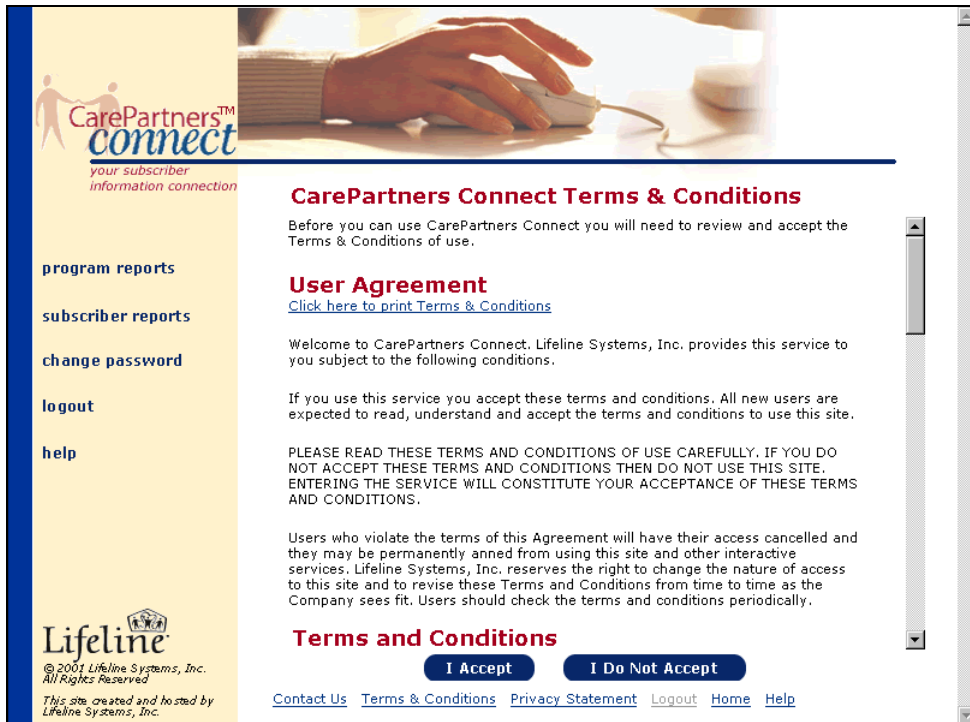
- Agree to Lifeline's Terms and Conditions for use of the site.
- Change your generic password to one that you select.
- Select a hint question, and enter a response to the hint question in case you forget your password later on.

When you enroll in CarePartners Connect, you receive a user name and a generic password. The user name is assigned and does not change. You are required to change your generic password the first time you log in to CarePartners Connect.

1. Open the page titled Log in to CarePartners Connect.
2. Enter the user name and password you received from Lifeline when you enrolled in CarePartners Connect.

### 3. Click **Enter**.

The CarePartners Connect Terms and Conditions page opens (Figure 2-2).



**Figure 2-2. Terms and Conditions**

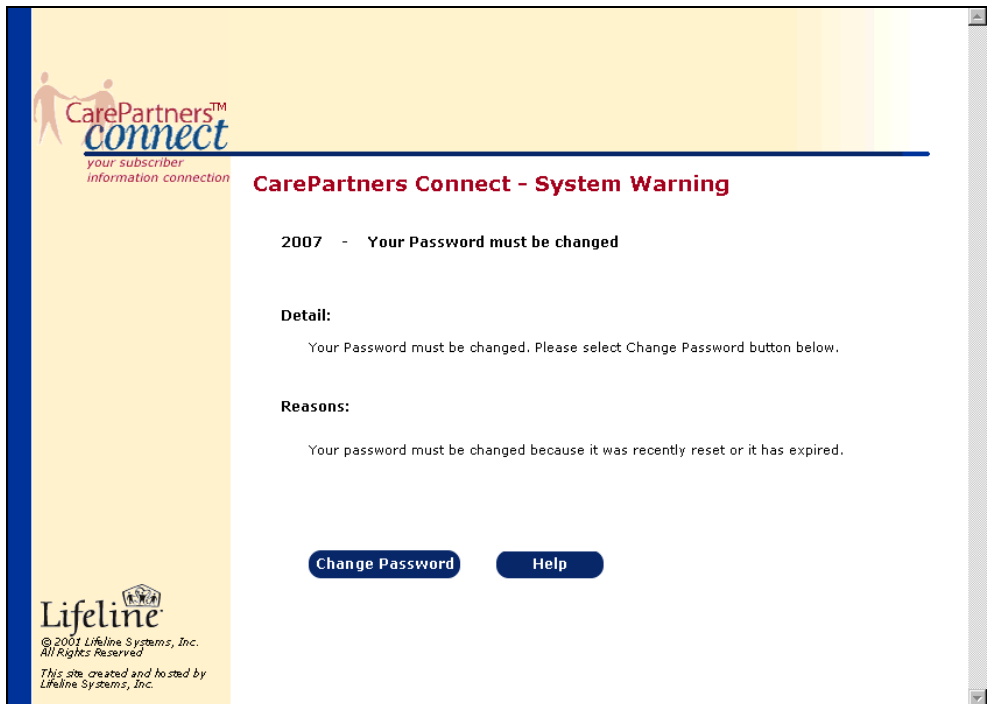
## NOTE

To print the Terms and Conditions, select **Click here to Print Terms & Conditions** underneath *User Agreement*.

#### 4. Review the Terms and Conditions:

- If you want to continue with the login process, click **I Accept**.
- If you do not agree to the Terms and Conditions, click **I Do Not Accept**.

If you click **I Do Not Accept**, the system returns you to the CarePartners Connect login page. If you click **I Accept**, a system warning appears to inform you that you must change your password from the generic password Lifeline provided to one only you know (Figure 2-3).



**Figure 2-3. System Warning**

5. Click **Change Password** at the bottom of the system warning page.

The Changing Your Password page opens (Figure 2-4). It contains STEPS 1, 2, and 3.

**CarePartners™ connect**  
your subscriber information connection

program reports  
subscriber reports  
**change password**  
logout  
help

**Changing Your Password**

Changing password for: Mary Smith

Select a password that is easy to remember. You will need this each time you access CarePartners Connect. Your password must be at least 6 alpha/numeric characters long.

**STEP 1: Please enter your old password.**

**Old Password:**

**STEP 2: Please enter your new password.**

**New Password:**

**STEP 3: Please confirm your new password and hit 'Change Password'.**

**New Password:**

**Change Password**

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**Figure 2-4. Changing Your Password**

6. Type your current password in the field labeled *Old Password*. If you are a first time user, your old password is the generic password you used when you logged in for the first time.
7. Type a new password in the field labeled *New Password*. (See *Password Administration* on page 13.)
8. Type your new password a second time to confirm it.
9. Click **Change Password** at the bottom of the page.

A system message appears to confirm that the password is changed.



10. Click **OK** at the bottom of the system message page.

A system warning appears to inform you that you must select a hint question and enter a hint response.

11. Click **Set Hint** at the bottom of the system warning page.

The Setting Your Hint Question & Response page opens (Figure 2-5). It contains STEPS 4, 5, and 6.

**CarePartners™ connect**  
your subscriber  
information connection

**Setting Your Hint Question & Response**

If you forget your password you can still access the system using a hint. You will need to select a hint question and response. When you forget your password, CarePartners Connect will display your hint question (i.e. your Mother's Maiden Name?), and you will need to respond to the question successfully to enter the system.

**STEP 4: Please select a hint question.**

**Hint Question :**

**STEP 5: Please enter your hint response.**

**Hint Response:**

**STEP 6: Please confirm your hint response.**

**Hint Response:**

**Set Hint**

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**Figure 2-5. Setting Your Hint Question & Response**

12. Select a hint question from the drop down list in STEP 4.
13. Type your response to the hint question in STEP 5.
14. Type your response to the hint question a second time in STEP 6.
15. Click **Set Hint** at the bottom of the page.

A system message appears to confirm that the hint and hint response are set.

16. Click **OK** at the bottom of the system message page.

The Welcome to CarePartners Connect page opens (Figure 2-6).



**Figure 2-6. Welcome to CarePartners Connect**

## NOTE

Appendix A, *Reference Information*, summarizes information available from the links at the bottom of the Welcome to CarePartners Connect page.

## Privacy of Records

Because the information in the Lifeline reports is so sensitive, CarePartners Connect uses strict security measures to prevent unauthorized entry. Program managers and their staff can see only information related to their own programs.

### **CAUTION**

---

CarePartners Connect gives you access to personal information about a subscriber. This information must be safeguarded. Never give access to someone who does not need to know this information.

---

# Password Administration

Information security in CarePartners Connect is critical. Learn the basic procedures and requirements related to your password. If you are a Lifeline program manager, learn how to assist members of your staff with password administration.

Please note the following about your password:

- Never write your password down. Select an easy to remember password.
- Passwords must be a minimum of 6 characters long.
- Blank passwords are not permitted.
- Your password is case sensitive.
- Passwords may contain any letter or numeral.
- Your password must contain both alphabetic and numeric characters.
- Passwords expire in 120 days.
- You cannot reuse a password.
- You can change your password at any time. Changes take effect immediately.
- You must supply your current password to change your password.
- If you forget your password and respond correctly to the hint question, CarePartners Connect requires you to select a new password.
- Program administrators do not know the passwords of other users in the program. Lifeline does not know anyone's password, and will never ask you for yours.

## NOTE

---

To prevent unauthorized access, your account is locked for ten minutes after several unsuccessful attempts to log in.

---

## How To Change Your Password

CarePartners Connect prompts you to change your password every 120 days. To change your password then or at any other time:

1. Click **change password** in the side menu bar.

The Changing Your Password page opens (Figure 2-7).

**CarePartners™ connect**  
your subscriber  
information connection

program reports  
subscriber reports  
**change password**  
logout  
help

**Changing Your Password**

Changing password for: Mary Smith

Select a password that is easy to remember. You will need this each time you access CarePartners Connect. Your password must be at least 6 alpha/numeric characters long.

**STEP 1: Please enter your old password.**

Old Password:

**STEP 2: Please enter your new password.**

New Password:

**STEP 3: Please confirm your new password and hit 'Change Password'.**

New Password:

**Change Password**

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**Figure 2-7. Changing Your Password**

2. Type your current password in the field labeled *Old Password*.
3. Type a new password in the field labeled *New Password*.  
(See *Password Administration* on page 13.)
4. Type your new password a second time to confirm it.

5. Click **Change Password** at the bottom of the page.

A CarePartners Connect system message appears to confirm that the password is changed. If your password does not meet the requirements stated in *Password Administration* on page 13, you will receive an error message.

6. Click **OK** at the bottom of the page.

The Welcome to CarePartners Connect page opens (Figure 2-8).



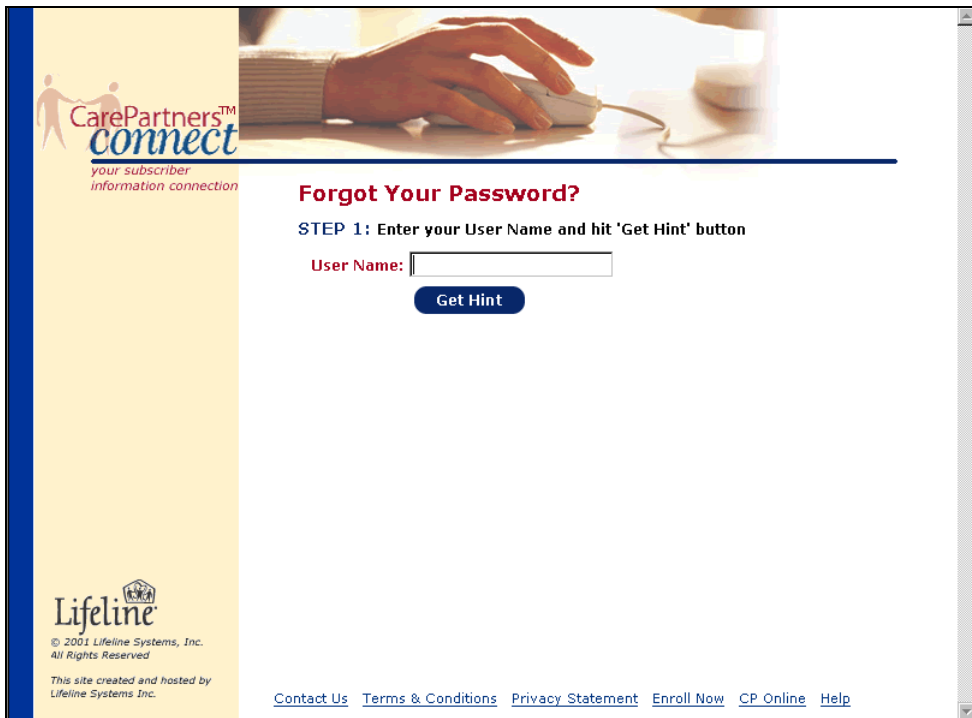
Figure 2-8. Welcome to CarePartners Connect

## What To Do If You Forget Your Password

If you have the login page open and find that you have forgotten your password, you can get help. To use this feature, you must have logged in at least once, and you must have set your hint and hint response. If you forget your password, follow these steps:

1. Click **Get help here** under *Forgot your password?*

The Forgot Your Password? page opens (Figure 2-9).



**CarePartners™ connect**  
your subscriber  
information connection

**Forgot Your Password?**

**STEP 1:** Enter your User Name and hit 'Get Hint' button

**User Name:**

**Get Hint**

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**Figure 2-9. Forgot Your Password?**

2. Type your user name in the field labeled *User Name*.

3. Click **Get Hint**.

The Hint & Answer page opens (Figure 2-10).

**CarePartners™ connect**  
your subscriber  
information connection

**Hint & Answer**

Here is your hint question.

**Hint:** What is your mothers maiden name?

**STEP 2:** Enter Hint Answer and hit 'OK' button

**Hint Answer:**

**OK**

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**Figure 2-10. Hint & Answer**

4. Read the hint question, and type your response in the field labeled *Hint Answer*.

5. Click **OK**.

The Your Response is Correct page confirms that you entered the correct hint response. If this confirmation does not appear, contact your program administrator to reset your password manually.



To complete the login process, you must change your password:

1. Click **OK** at the bottom of the page titled Your Response is Correct.

The Changing Your Password page opens (Figure 2-11).

**CarePartners™ connect**  
your subscriber information connection

program reports  
subscriber reports  
**change password**  
logout  
help

**Changing Your Password**

Changing password for: Steve Greffenius

Select a password that is easy to remember. You will need this each time you access CarePartners Connect. Your password must be at least 6 alpha/numeric characters long.

**STEP 1: Please enter your old password.**

Old Password:

**STEP 2: Please enter your new password.**

New Password:

**STEP 3: Please confirm your new password and hit 'Change Password'.**

New Password:

**Change Password**

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**Figure 2-11. Changing Your Password**

2. Type a new password in the field labeled *New Password*.  
(See *Password Administration* on page 13.)
3. Type your new password a second time to confirm it.
4. Click **Change Password** at the bottom of the page.

A CarePartners Connect system message appears to confirm that the password is changed.

5. Click **OK** at the bottom of the system message page.

The Welcome to CarePartners Connect page opens (Figure 2-12).



Figure 2-12. Welcome to CarePartners Connect

---

## 3. Reports

Chapter 3 discusses these CarePartners Connect reports:

- *Subscriber Lists* (subscribers listed by name and by unit number)
- *Installation List*
- *Deactivation List*
- *Care Plan Agreement*
- *Case History*

The flow chart in Figure 3-1 on page 21 shows how these reports are organized.

## Program Reports & Subscriber Reports

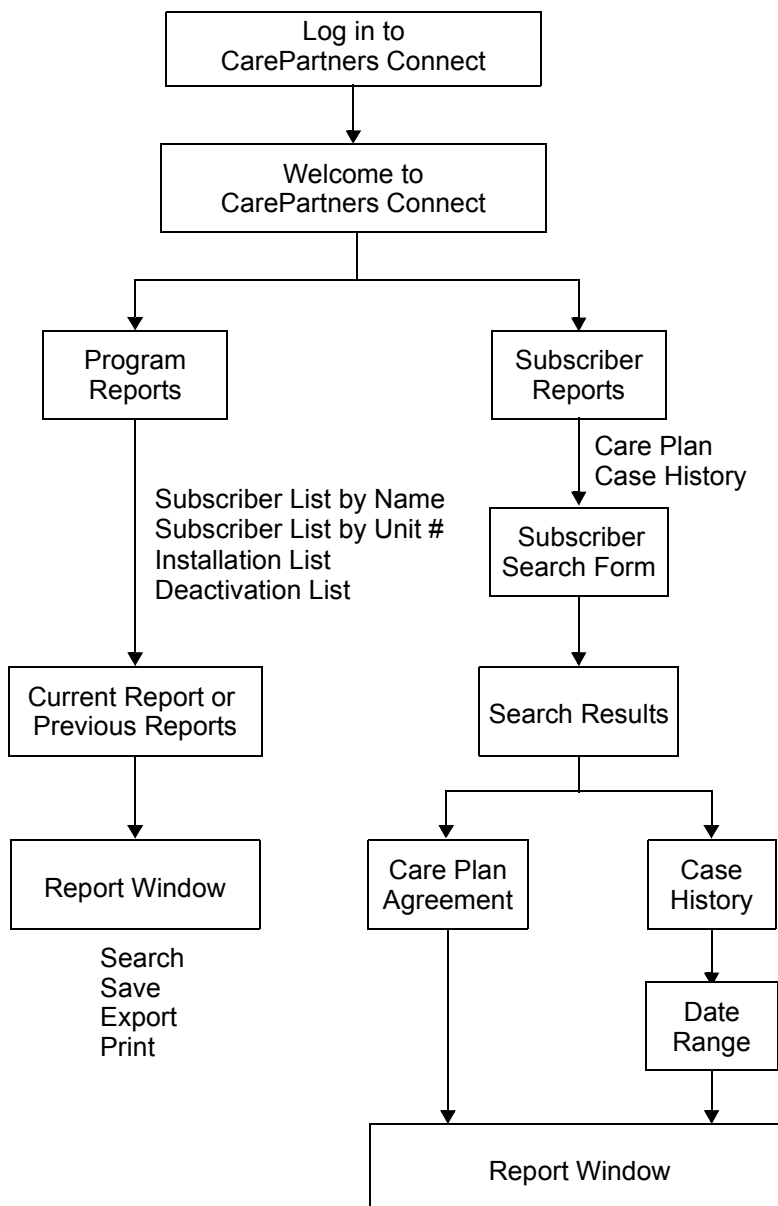



Figure 3-1. Program Reports and Subscriber Reports

## A Quick Tour of the Report Window

When you open a report, it appears in a separate report window. You can open as many report windows as you like. Figure 3-2 illustrates a report window with the navigation pane open.

Contents	First	Prev	Next	Last	Goto	Page 5 of 7	100%	Search	Print/Save	Export	Help X
----------	-------	------	------	------	------	-------------	------	--------	------------	--------	--------



**Subscriber List Sorted By Name On 2/19/2002**

**CPC Central Hospital** **MA990** Program Manager: Joe Stanton  
Office Phone: (000) 000-0000

Name	Model	Subscriber ID	Unit #	Address	City	State	ZIP	Phone #	Status
<a href="#">Brady, Tom</a>	9500	5509368	6761001208	101 Lawrence Street	Woburn	MA	1801	(508) 555-7771	Active
<a href="#">Brown, Troy</a>	9500	5509366	6524301109	21 Bear Street	Van Buren	ME	04785	(978) 666-4444	Active
<a href="#">Bruschi, Teddy</a>	9500	5509371	6305831411	874 Beaver Lane	Framingham	MA	01702	(508) 971-3811	Active
<a href="#">Cox, Brian</a>	0000	5509364	0000	123 Mass Avenue	Harvard	MA	01451	(978) 455-3047	Active
<a href="#">Johnson, Ted</a>	9500	5509370	6741881816	184 Steve Street	Framingham	MA	01702	(508) 746-3333	Active
<a href="#">Law, Ty</a>	9500	5509363	6819551222	29 Lakeside Road	Groton	MA	01471	(978) 698-8841	Active
<a href="#">Light, Matt</a>	9500	5509369	6633471316	888 Lawrence Street	Framingham	MA	01702	(508) 746-9720	Active
<a href="#">Milroy, Lawryer</a>	9500	5509365	6527281018	69 River Road	Groton	MA	01450	(978) 456-3077	Active
<a href="#">Rutledge, Rod</a>	9500	5509367	6769671823	20 Mass Ave	Bolton	MA	01740	(978) 555-7131	Active

**Totals :**

Active : 9

Inactive : 0

Pending Conversion : 0

Pending Unit Assign-Distrib : 0

Pending Unit Assign-Field : 0

Pending Install : 0

Pending Deactivation : 0

Demo : 0

**Figure 3-2. Report Window**

From the report window, you can:

- **Navigate** a report (see *How to Navigate a Subscriber List* on page 30).
- **Search** for a specific entry in the report.
- **Print** or **Save** the report as a PDF document.
- **Export** the report as a comma delimited text file.

You can search, print, save, and export a program report. You can print and save a Care Plan Agreement, and you can print and save a Case History. Table 3-1 below summarizes the functions available for each type of report.

**Table 3-1. Report Window Functions for Each Type of Report**

Type of Report	Search	Save	Print	Export
Program Reports	Yes	Yes	Yes	Yes
Care Plan Agreement	No	Yes	Yes	No
Case History	No	Yes	Yes	No

Click **Contents** in the top menu bar to toggle the navigation pane on and off. The navigation pane contains a table of contents for the report, organized by program code. Click the links in the navigation pane to go to a particular section of the report. To navigate the hierarchy of program codes in the table of contents, click the triangles to the left of the entries.

Remember the following points when you use the report window:

- The Contents pane lists program codes for subscriber lists. It lists cases in a Case History.
- The page field in the top menu bar shows which page of the report is open.
- Click **Help** in the top menu bar to open the *Guide to CarePartners Connect*.

## NOTE

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You can run a Care Plan or a Case History from any program report. To do so, click the name of the individual subscriber.

---

To zoom in or out in the report window, click the down arrow to the right of 100% in the top menu bar. Select a value less than 100% to zoom out. Select a value greater than 100% to zoom in. To close a report, click the **X** in the upper right-hand corner of the report window.

## Subscriber Lists

Subscriber lists are sorted by subscriber name or unit number. They contain complete and current information for all of your program's subscribers. The lists also include information about subscribers who have enrolled in a program, but who are not yet currently active.

### NOTE

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The *Current Report* shows who your subscribers are as of the time stamp on the bottom of the report (that is usually midnight of the previous day). *Previous Reports* contain subscriber data for up to the past twelve months. See Figure 3-5 on page 27.

---

## How to Open a Subscriber List

The following procedure starts at the Welcome to CarePartners Connect page (Figure 3-3). The procedure assumes that you have completed the first-time login process, and that you want to open one subscriber list.



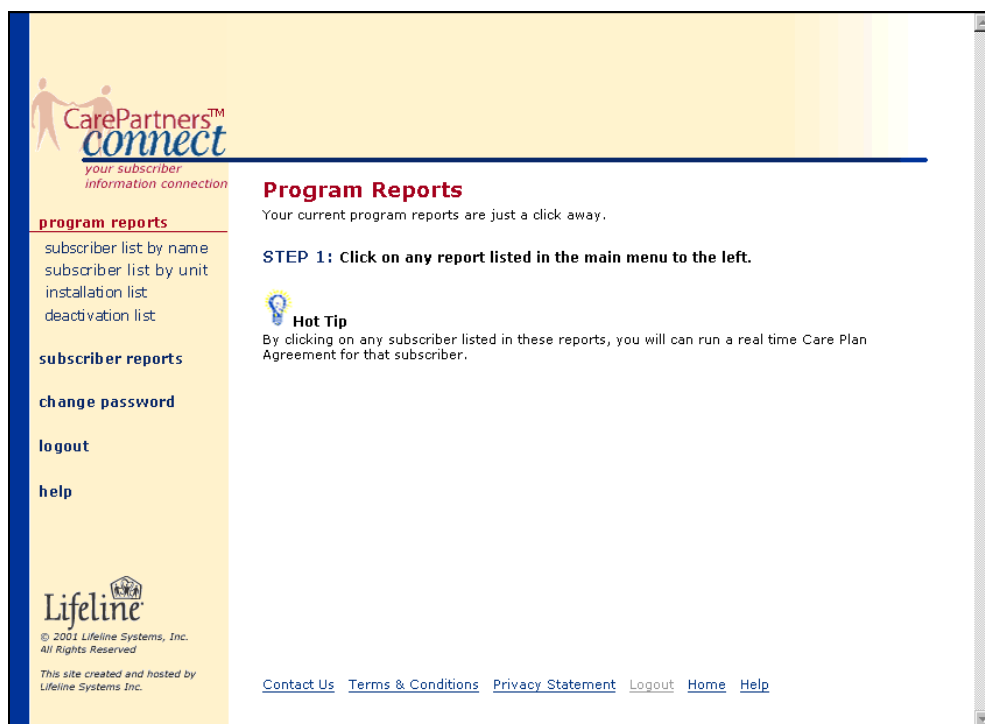
**Figure 3-3. Welcome to CarePartners Connect**



To open a subscriber list:

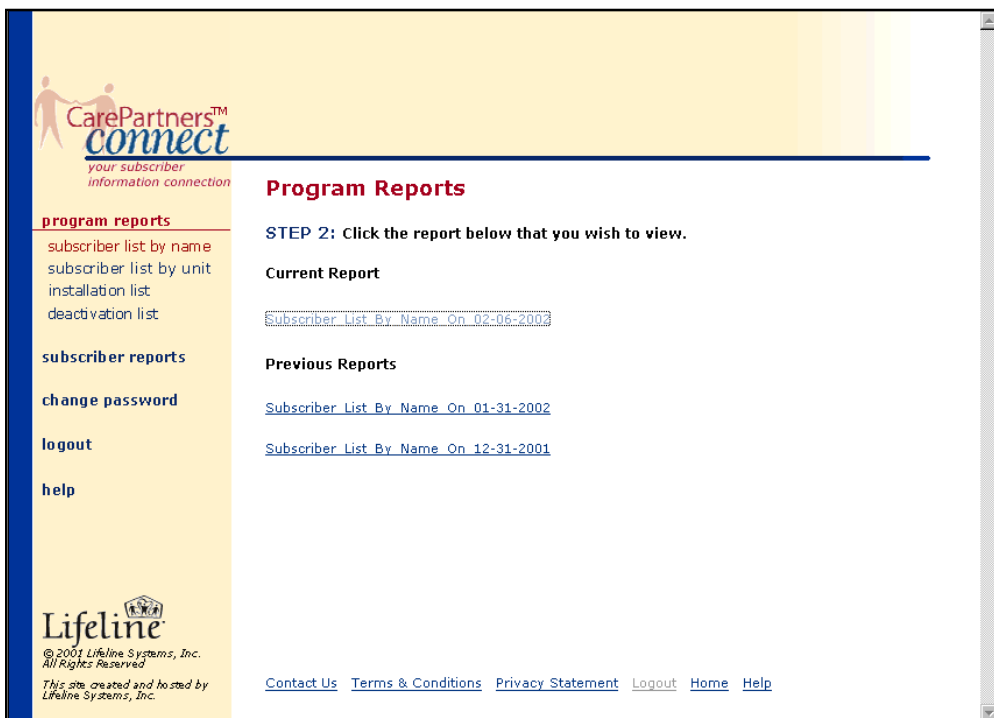
1. Click **program reports** in the sidebar menu.

The Program Reports page opens (Figure 3-4).



**Figure 3-4. Program Reports**


2. Click **subscriber list by name** in the sidebar menu.  
The subscriber list selection page opens (Figure 3-5).



**Figure 3-5. Subscriber Lists**

3. Click the link under *Current Report*.

The subscriber list opens in a separate report window (Figure 3-6).

Contents First Prev <b>Next</b> Last Goto Page 5 of 7 100% Search Print/Save Export Help X									
 <b>Subscriber List Sorted By Name On 2/19/2002</b>									
<b>CPC Central Hospital</b>				<b>MA990</b>			Program Manager: Joe Stanton Office Phone: (000) 000-0000		
Name	Model	Subscriber ID	Unit #	Address	City	State	ZIP	Phone #	Status
<a href="#">Brady, Tom</a>	9500	5509368	6761001208	101 Lawrence Street	Woburn	MA	1801	(508) 555-7771	Active
<a href="#">Brown, Troy</a>	9500	5509366	6524301109	21 Bear Street	Van Buren	ME	04785	(978) 666-4444	Active
<a href="#">Bruschi, Teddy</a>	9500	5509371	6305831411	874 Beaver Lane	Framingham	MA	01702	(508) 971-3811	Active
<a href="#">Cox, Brian</a>	0000	5509364	0000	123 Mass Avenue	Harvard	MA	01451	(978) 455-3047	Active
<a href="#">Johnson, Ted</a>	9500	5509370	6741881816	184 Steve Street	Framingham	MA	01702	(508) 746-3333	Active
<a href="#">Law, Ty</a>	9500	5509363	6819551222	29 Lakeside Road	Groton	MA	01471	(978) 698-8841	Active
<a href="#">Light, Matt</a>	9500	5509369	6633471316	888 Lawrence Street	Framingham	MA	01702	(508) 746-9720	Active
<a href="#">Milloy, Lawyer</a>	9500	5509365	6527261018	69 River Road	Groton	MA	01450	(978) 456-3077	Active
<a href="#">Rutledge, Rod</a>	9500	5509367	6769671823	20 Mass Ave	Bolton	MA	01740	(978) 555-7131	Active
<b>Totals :</b>									
<b>Active :</b>		9							
<b>Inactive :</b>		0							
<b>Pending Conversion :</b>		0							
<b>Pending Unit Assign-Distrib :</b>		0							
<b>Pending Unit Assign-Field :</b>		0							
<b>Pending Install :</b>		0							
<b>Pending Deactivation :</b>		0							
<b>Demo :</b>		0							

**Figure 3-6. Subscriber List in the Report Window**

## NOTE

To open a subscriber's Care Plan Agreement or Case History, click the individual's name in the left-hand column of the subscriber list. A Search Results page opens with information about the subscriber you selected (see Figure 3-21 on page 48). Click **Care Plan** at the bottom of the Search Results page to open the Care Plan Agreement. To open the subscriber's case history, click **Case History** and specify the desired date range for the history.

Figure 3-7 summarizes the steps required to open a program report.

## How to Open a Program Report

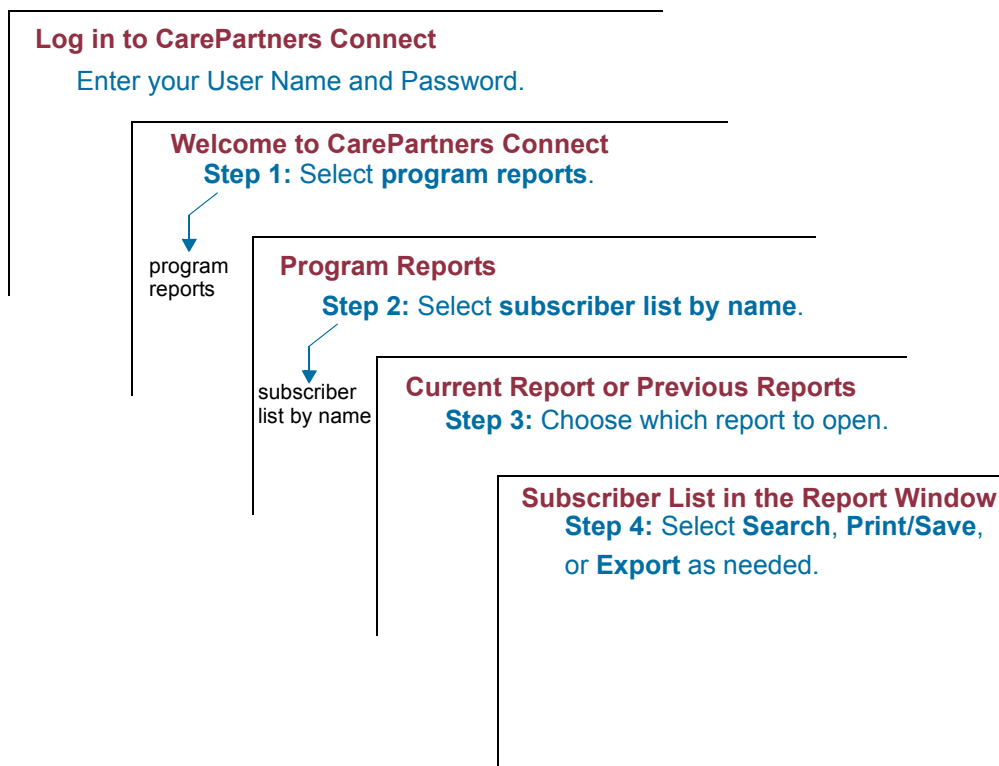


Figure 3-7. How to Open a Program Report

## How to Navigate a Subscriber List

You can navigate your subscriber list with two sets of tools: the table of contents in the Contents pane and the page navigation buttons in the top menu bar.

Use the table of contents to locate the part of the list you are interested in. The procedure below assumes that you have already opened the subscriber list in the report window. To locate a specific program in a long subscriber list:

1. Click **Contents** in the top menu bar.

A side pane opens that shows the contents of the subscriber list by program number (Figure 3-8).

The screenshot shows the Lifeline software interface. On the left is the 'Contents' pane with a tree view showing 'MA777' (Report, State Funded), 'MA990' (Report), and 'MA998'. The main window displays the 'Subscriber List Sorted By Name On 2/19/2002' for 'CPC Central Hospital' (MA990). The table lists subscribers with columns: Name, Model, Subscriber ID, Unit #, Address, City, State, ZIP, and Phone. Below the table is a 'Totals' section with various status counts.

Name	Model	Subscriber ID	Unit #	Address	City	State	ZIP	Phone
<a href="#">Brady, Tom</a>	9500	5509368	6761001208	101 Lawrence Street	Woburn	MA	1801	(508) 555
<a href="#">Brown, Troy</a>	9500	5509366	6524301109	21 Bear Street	Van Buren	ME	04785	(978) 666
<a href="#">Bruschi, Teddy</a>	9500	5509371	6305831411	874 Beaver Lane	Frammingham	MA	01702	(508) 971
<a href="#">Cox, Brian</a>	0000	5509364	0000	123 Mass Avenue	Harvard	MA	01451	(978) 455
<a href="#">Johnson, Ted</a>	9500	5509370	6741881816	184 Steve Street	Frammingham	MA	01702	(508) 746
<a href="#">Lew, Ty</a>	9500	5509363	6819551222	29 Lakeside Road	Groton	MA	01471	(978) 696
<a href="#">Light, Matt</a>	9500	5509369	6633471316	888 Lawrence Street	Frammingham	MA	01702	(508) 746
<a href="#">Milroy, Lawmyer</a>	9500	5509365	6527261018	89 River Road	Groton	MA	01450	(978) 455
<a href="#">Rutledge, Rod</a>	9500	5509367	6769671823	20 Mass Ave	Bolton	MA	01740	(978) 555

**Totals :**

- Active : 9
- Inactive : 0
- Pending Conversion : 0
- Pending Unit Assign-Distrib : 0
- Pending Unit Assign-Field : 0
- Pending Install : 0
- Pending Deactivation : 0
- Demo : 0

Figure 3-8. Subscriber List with the Contents Pane Open

## NOTE

---

To close the contents pane, click **Contents** in the top menu bar again.

---

2. To show the subcategories under each program code, click the blue triangle next to the code.
3. Continue to open sublists until you have reached the subscriber list you want.

In addition to the contents pane, you can use the page navigation button in the top menu bar of the report window to move around in a subscriber list. The five buttons are:

First	Opens the first page in the document.
Prev	Opens the previous page. For example, click <b>Prev</b> to move from page 8 to page 7.
Next	Opens the next page. For example, click <b>Next</b> to move from page 8 to page 9.
Last	Opens the last page in the document.
Goto	Opens the specified page. For example, type the numeral 4 in the <i>Page</i> field of the top menu bar. Then click <b>Goto</b> . Page 4 of the report opens in the report window.

## How to Search a Subscriber List

To find a subscriber or set of subscribers in the subscriber list:

1. Click **Search** in the top menu bar.

A search pane opens to the left of the report window (Figure 3-9). The search pane lists the searchable fields in the subscriber list. All the fields in the subscriber list are searchable except the street address.

The screenshot shows the Lifeline software interface. On the left is a 'New Search' pane with the following fields: Subscriber Name, Program Code, Model Type, Subscriber ID, Unit Number, City, State, Zip Code, Phone Number, and Subscriber Status. A 'Search' button is at the bottom of this pane. The main window displays a 'Subscriber List Sorted By Name On 2/19/2002' for 'CPC Central Hospital' with zip code 'MA990'. The list has columns for Name, Model, Subscriber ID, Unit #, Address, and City. Below the list is a 'Totals' section with various status counts.

Name	Model	Subscriber ID	Unit #	Address	City
<a href="#">Brady, Tom</a>	9500	5509368	6761001208	101 Lawrence Street	Woburn
<a href="#">Brown, Troy</a>	9500	5509366	6524301109	21 Bear Street	Van Buren
<a href="#">Bruschi, Teddy</a>	9500	5509371	6305831411	874 Beaver Lane	Framingham
<a href="#">Cox, Brian</a>	0000	5509364	0000	123 Mass Avenue	Harvard
<a href="#">Johnson, Ted</a>	9500	5509370	6741881816	184 Steve Street	Framingham
<a href="#">Law, Ty</a>	9500	5509363	6819551222	29 Lakeside Road	Groton
<a href="#">Light, Matt</a>	9500	5509369	6633471316	888 Lawrence Street	Framingham
<a href="#">Milroy, Laverne</a>	9500	5509365	6527261018	69 River Road	Groton
<a href="#">Rutledge, Rod</a>	9500	5509367	6769671823	20 Mass Ave	Bolton

Totals :	
Active :	9
Inactive :	0
Pending Conversion :	0
Pending Unit Assign-Distrib :	0
Pending Unit Assign-Field :	0
Pending Install :	0
Pending Deactivation :	0
Demo :	0

Figure 3-9. Search Pane Open in the Report Window

2. Enter the search criteria for the subscriber you want to find.

3. Click **Search** at the top of the search pane.

The search results appear in the search pane (Figure 3-10).

- Click **Export** to export the search results to a comma delimited text file.
- Click **New Search** above the search results to clear the current search criteria.
- Click the **X** in the upper right-hand corner of the search pane to close the pane.

**New Search** X

**STEP 2:** Select a subscriber to view, export results or print page.

Report Search found 9 matches.

**Results 1 - 9**

SubscriberName	Program_Code	ModelType	Su
<a href="#">Armstrong, Bruce</a>	MA998	9500	55
<a href="#">Buckley, Terrel</a>	MA998	9500	55
<a href="#">Coates, Ben</a>	MA998	9500	55
<a href="#">Faulk, Kevin</a>	MA998	9500	55
<a href="#">Grogan, Steve</a>	MA998	9500	55
<a href="#">Pleasant, Anthony</a>	MA998	9500	55
<a href="#">Redmon, J.R.</a>	MA998	9500	55
<a href="#">Vinatieri, Adam</a>	MA998	9500	55
<a href="#">Woody, Damien</a>	MA998	9500	55

**Results 1 - 9**

Export search results as comma delimited file. (csv)

**Export Results**

**Lifeline**

**Subscriber List Sorted By Name On 2/19/2002**

**CPC Central Hospital** **MA990**

Name	Model	Subscriber ID	Unit #	Address	City
<a href="#">Brady, Tom</a>	9500	5509368	6761001208	101 Lawrence Street	Woburn
<a href="#">Brown, Troy</a>	9500	5509366	6524301109	21 Bear Street	Van Bur
<a href="#">Bruschi, Teddy</a>	9500	5509371	6305831411	874 Beaver Lane	Framingh
<a href="#">Cox, Brian</a>	0000	5509364	0000	123 Mass Avenue	Harvard
<a href="#">Johnson, Ted</a>	9500	5509370	6741881816	184 Steve Street	Framingh
<a href="#">Law, Ty</a>	9500	5509363	6819551222	29 Lakeside Road	Groton
<a href="#">Light, Matt</a>	9500	5509369	6633471316	888 Lawrence Street	Framingh
<a href="#">Milov, Lawver</a>	9500	5509365	6527261018	69 River Road	Groton
<a href="#">Rutledge, Rod</a>	9500	5509367	6769671823	20 Mass Ave	Boton

**Totals:**

**Active :** 9

**Inactive :** 0

**Pending Conversion :** 0

**Pending Unit Assign-Distrib :** 0

**Pending Unit Assign-Field :** 0

**Pending Install :** 0

**Pending Deactivation :** 0

**Demo :** 0

Figure 3-10. Subscriber List Search Results



Remember the following points as you search a subscriber list:

- Click a name in the subscriber list to open that individual's Care Plan Agreement or Case History.
- Ten columns in the subscriber list are searchable. The street address is not searchable.
- You can use the search function to locate entries in the list. Each entry in the search results contains a link to the corresponding page in the subscriber list.
- The search pane lists ten records at a time. If a search returns more than ten records, click **Next** at the bottom of the search pane to display more search results.
- To export the search results to a spreadsheet program in a comma delimited file, click **Export Results** at the bottom of the search pane.

## **NOTE**

---

When you search a subscriber list, the system does not *select* individuals from the database. Rather, the search results in the left-hand pane contain links to relevant entries in the report.

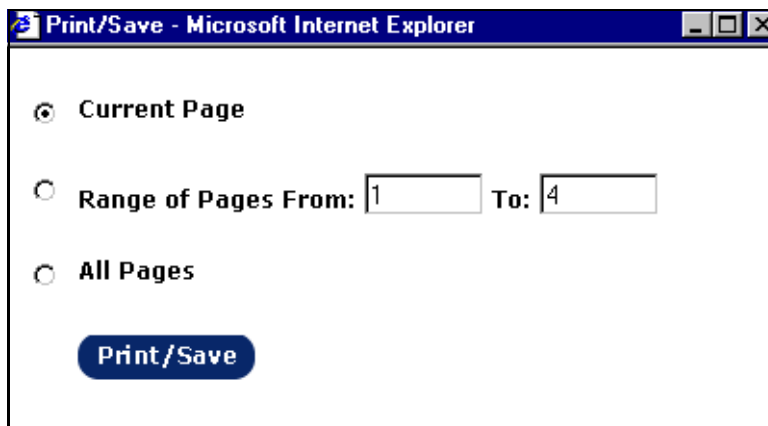
---

## How to Save a Subscriber List

To save a subscriber list as a PDF document:

1. Click **Print/Save** in the top menu bar of the report window.

The **Print/Save** dialog box opens (Figure 3-11).



**Figure 3-11. Print/Save Dialog Box**

2. Select one of three options:

- Current page
- Range of Pages From: \_\_\_\_ To: \_\_\_\_
- All Pages

3. Click **Print/Save** at the bottom of the dialog box.

The selected pages open in Acrobat Reader (Figure 3-12).

**Lifeline** Printed From  
CarePartners Connect

**Subscriber List Sorted By Name On 2/19/2002**

**CPC Central Hospital** **MA990** Program Manager: Joe Stanton  
Office Phone: (000) 000-0000

Name	Model	Subscriber ID	Unit #	Address	City	State	ZIP	Phone #	Status
Brady, Tom	9500	5500968	6761001208	101 Lawrence Street	Woburn	MA	1801	(508) 555-7771	Active
Brown, Troy	9500	5500966	6524301109	21 Bear Street	Van Buren	ME	04785	(978) 666-4444	Active
Brusch, Teddy	9500	5500971	6305631411	874 Beaver Lane	Framingham	MA	01702	(508) 971-3811	Active
Cox, Brian	0000	5500964	0000	123 Mass Avenue	Harvard	MA	01451	(978) 455-3047	Active
Johnson, Ted	9500	5500970	6741881816	184 Slave Street	Framingham	MA	01702	(508) 746-3333	Active
Law, Ty	9500	5500963	6819551222	29 Lakeside Road	Groton	MA	01471	(978) 698-8841	Active
Light, Matt	9500	5500969	6633471316	888 Lawrence Street	Framingham	MA	01702	(508) 746-9720	Active
Millroy, Lawyer	9500	5500965	6527261018	69 River Road	Groton	MA	01450	(978) 456-3077	Active
Rutledge, Rod	9500	5500967	6769671823	20 Mass Ave	Bolton	MA	01740	(978) 555-7131	Active

**Totals :**

- Active : 9
- Inactive : 0
- Pending Conversion : 0
- Pending Unit Assign-Distrib : 0
- Pending Unit Assign-Field : 0
- Pending Install : 0
- Pending Deactivation : 0
- Demo : 0

1 of 1 11 x 8.5 in

**Figure 3-12. Subscriber List Open in Acrobat Reader**

4. Click the disk icon in the Acrobat toolbar.

The Save a Copy... dialog box opens.

5. Specify a folder and a filename for the PDF file.

6. Click **Save**.

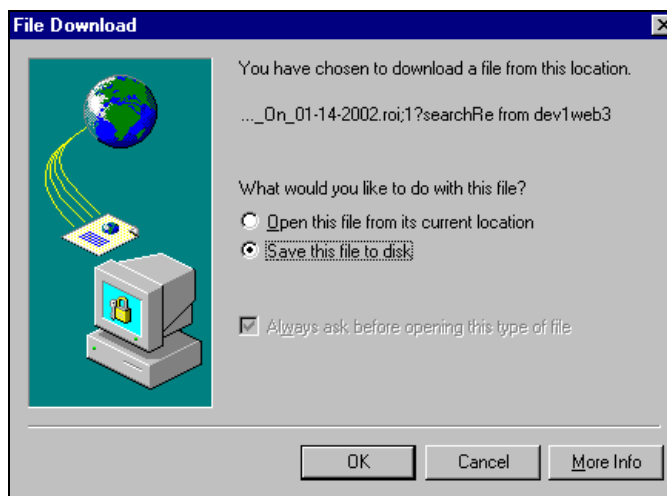
The Save a Copy... dialog box closes.

7. Use Windows Explorer to verify that the file is saved in the proper location.

## How to Export a Subscriber List

The Export function saves the entire file as plain text in comma delimited format. A file in this format has a .csv extension. You can open the text file in a spreadsheet such as Excel. To export a .csv file for use in another application:

1. Click **Export** in the top menu bar of the report window.  
The File Download dialog box opens (Figure 3-13).



**Figure 3-13. File Download Dialog Box**

2. Select *Open the file from its current location* in the dialog box.  
To save the exported file without opening it, select *Save this file to disk* in the dialog box.
3. Click **OK**.  
The data file opens in Excel.
4. To save the Excel file to your hard drive, click **File > Save** in the Excel menu bar.

**NOTE**

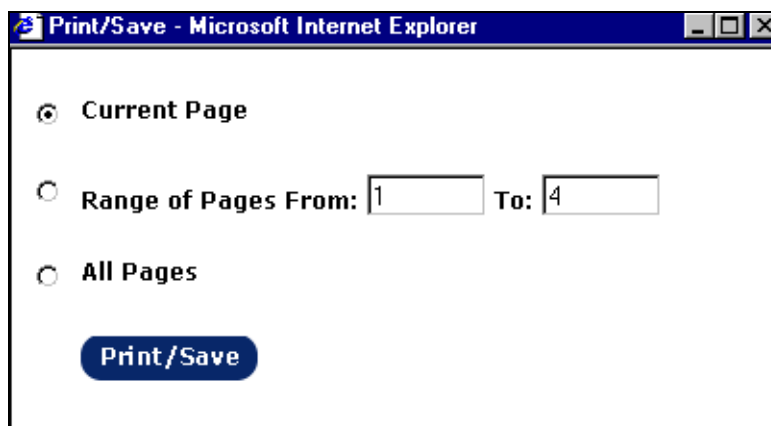
If Excel is configured to accept .csv files, the exported file automatically opens in Excel when you click **OK** in the File Download dialog box. If Excel is not configured to accept .csv files, the exported file opens in Notepad.

## How to Print a Subscriber List

To print a subscriber list:

1. Click **Print/Save** in the top menu bar of the report window.

The **Print/Save** dialog box opens (Figure 3-14).

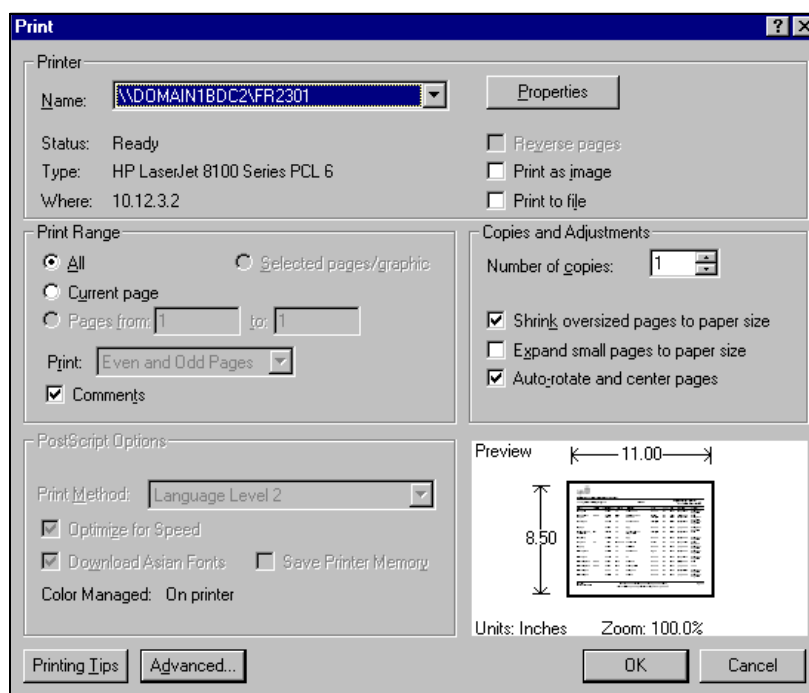


**Figure 3-14. Print/Save Dialog Box**

2. Select one of three options:
    - Current page
    - Range of Pages From: \_\_\_\_ To: \_\_\_\_
    - All Pages
  3. Click **Print/Save** at the bottom of the dialog box.
- The selected pages open in Acrobat Reader.

4. Click the printer icon in the Acrobat toolbar.

The Print dialog box opens (Figure 3-15).



**Figure 3-15. Print Dialog Box**

5. Verify that the settings in the Print dialog box are correct.

6. Click **OK**.

The report is sent to the locally connected printer and the dialog box closes.

## Installation List

The procedures used to work with an installation list are nearly the same as those used to work with subscriber lists. For more information, please refer to *A Quick Tour of the Report Window* on page 22, and to the detailed procedures in *Subscriber Lists* on page 24.

Click **program reports > installation list** in the side menu bar to open the Program Reports page (Figure 3-16). The page shows lists that contain all of the installations conducted during a particular period. If you select the *Current Report*, the report window lists all installations for the current month to date. If you select one of the *Previous Reports*, the report window lists installations for the month you selected.


The screenshot displays the CarePartners Connect web interface. On the left is a vertical navigation menu with the following items: **program reports** (highlighted), subscriber list by name, subscriber list by unit, installation list, deactivation list, subscriber reports, change password, logout, and help. The main content area is titled **Program Reports** and includes the instruction: **STEP 2: Click the report below that you wish to view.** Under the **Current Report** section, there is a link: [Installation\\_List\\_Through\\_02-19-2002](#). Under the **Previous Reports** section, there are two links: [Installation\\_List\\_Through\\_01-31-2002](#) and [Installation\\_List\\_Through\\_12-31-2001](#). The footer contains the Lifeline logo, copyright information for Lifeline Systems, Inc. (© 2001), and a list of links: [Contact Us](#), [Terms & Conditions](#), [Privacy Statement](#), [Logout](#), [Home](#), and [Help](#).

Figure 3-16. Current and Previous Installation Lists

Figure 3-17 shows a sample installation list. The list contains the subscriber's name and ID number, unit number, installation date, and service type. The system sorts the entries in the list chronologically by installation date, and then by subscriber last name.

Contents	First	Prev	Next	Last	Goto	Page 1 of 3	100%	Search	Print/Save	Export	Help	X
----------	-------	------	------	------	------	-------------	------	--------	------------	--------	------	---



**Installation List From 02/01/2002 To 02/19/2002**

**CPC Central Hospital**      **MA990**      Program Manager: Joe Stanton  
Office Phone: (000) 000-0000

Name	Subscriber Id	City/State	Unit #	Installation Date	Service Type
<a href="#">Brady, Tom</a>	5509368	Woburn, MA	6761001208	02/01/2002	Lifeline
<a href="#">Bruschi, Teddy</a>	5509371	Framingham, MA	6305831411	02/01/2002	Lifeline
<a href="#">Johnson, Ted</a>	5509370	Framingham, MA	6741881816	02/01/2002	Lifeline
<a href="#">Brown, Troy</a>	5509366	Van Buren, ME	6524301109	02/02/2002	Lifeline
<a href="#">Cox, Brian</a>	5509364	Harvard, MA	0000	02/02/2002	Lifeline
<a href="#">Law, Ty</a>	5509363	Groton, MA	6819551222	02/02/2002	Lifeline
<a href="#">Licht, Matt</a>	5509369	Framingham, MA	6633471316	02/03/2002	Lifeline
<a href="#">Rutledge, Rod</a>	5509367	Bolton, MA	6769671823	02/03/2002	Lifeline
<a href="#">Milloy, Lawyer</a>	5509365	Groton, MA	6527261018	02/04/2002	Lifeline

**Total Installations:** 9

End Of Report

Figure 3-17. Installation List



To move from page to page in the installation list:

- Click **First** to open page 1 of the list.
- Click **Prev** to open the previous page in the list.  
For example, if the installation list is open to page 3, click **Prev** to open page 2. If you click **Prev** when the list is open to page 1, the report window does not move to another page.
- Click **Next** to open the next page in the list.  
For example, if the installation list is open to page 3, click **Next** to open page 4.
- Click **Last** to open the last page in the list.
- To open a specific page in the installation list, enter the page number in the *Page* field. Then click **Goto** in the top menu bar. The report window goes to the page you entered.

The three items on the right side of the top menu bar in the report window are:

Search	Search the list on one or more searchable fields.
Print/Save	Use Acrobat to print or save data from the list.
Export	Export the list to another application in comma delimited format.

## Deactivation List

The procedures used to work with a deactivation list are nearly the same as those used to work with subscriber lists. For more information, please refer to *A Quick Tour of the Report Window* on page 22, and to the detailed procedures in *Subscriber Lists* on page 24.

Click **program reports > deactivation list** in the side menu bar to open the Program Reports page (Figure 3-18). The page shows lists that contain all of the deactivations conducted during a particular period. If you select the current report, the report window lists all deactivations for the current month to date. If you select one of the previous reports, the report window lists deactivations for the month you select.

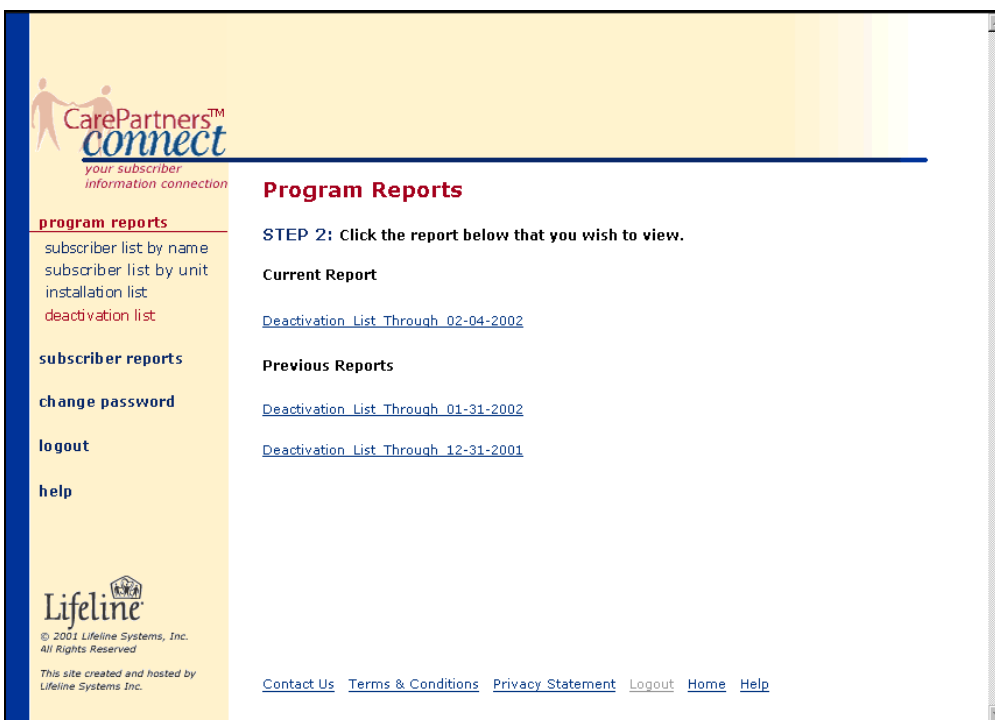


Figure 3-18. Current and Previous Deactivation Lists

Figure 3-19 shows a sample deactivation list. The list contains the subscriber's name and ID number, city and state, deactivation date, days on service, and deactivation reason. The system sorts the entries in the list chronologically by deactivation date.


Contents First Prev Next Last Goto Page 1 of 3 100% Search Print/Save Export Help X					
					
<b>Deactivation List From 02/01/2002 To 02/19/2002</b>					
<b>CPC Central Hospital</b>		<b>MA990</b>		Program Manager: Joe Stanton	
				Office Phone: (000) 000-0000	
Name	Subscriber Id	City/State	Date Deactivated	Days On Service*	Deactivation Reason
<a href="#">Bledsoe, Drew</a>	5509362	Princeton, MA	02/03/2002	3,206	
<b>Total Deactivations:</b> 1 <b>Average Days On Service:</b> 3,206					
<small>*Current installation date to deactivated date.            Accuracy of this information can not be guaranteed.</small>					
End Of Report					

Figure 3-19. Deactivation List

To move from page to page in the deactivation list:

- Click **First** to open page 1 of the list.
- Click **Prev** to open the previous page in the list.  
For example, if the deactivation list is open to page 3, click **Prev** to open page 2. If you click **Prev** when the list is open to page 1, the report window does not move to another page.
- Click **Next** to open the next page in the list.  
For example, if the deactivation list is open to page 3, click **Next** to open page 4.
- Click **Last** to open the last page in the list.
- To open a specific page in the deactivation list, enter the page number in the *Page* field. Then click **Goto** in the top menu bar. The report window goes to the page you entered.

The three items on the right side of the top menu bar in the report window are:

Search	Search the list on one or more searchable fields.
Print/Save	Use Acrobat to print or save data from the list.
Export	Export the list to another application in comma delimited format.

## Care Plan Agreement

The Care Plan Agreement contains critical information for an individual subscriber, gathered at the time of enrollment and installation. The online Care Plan Agreement contains the latest information entered in the subscriber database.

The Care Plan Agreement contains confidential information:

- Hidden key location
- Medical conditions
- Social security number
- Responders' contact information
- Any billing information that might appear

### **CAUTION**

---

The information in the Care Plan Agreement is extremely sensitive!  
*Monitor access to these reports, and keep passwords secure.*

---

## How to Open a Care Plan Agreement

To open a Care Plan Agreement in the report window:

1. Click **subscriber reports** in the side menu bar of the Welcome page.

The Subscriber Search form opens (Figure 3-20).

The screenshot shows the 'Subscriber Search' form within the CarePartners connect interface. The left sidebar contains navigation links: 'program reports', 'subscriber reports' (highlighted), 'care plan agreement', 'case history', 'change password', 'logout', and 'help'. The main content area is titled 'Subscriber Search' and includes instructions: 'To run a real time Subscriber report, follow the steps below. Subscriber data is stored for 90 days after deactivation.' Below this, 'STEP 1: Enter search criteria and then hit 'Search' button.' is followed by a note: 'Enter information in one of the fields below. If the search criteria are too broad and list too many subscribers, you will need to narrow your search.' The form fields include: 'Home Phone#' (three separate input boxes), 'Unit#' (one input box), 'Last Name:' (one input box with a note '(starts with, min 2 char)'), and 'AND (optional)' section with 'First Name:' (one input box with note '(starts with)'), 'City:' (one input box with note '(starts with)'), and 'Zip Code:' (one input box). At the bottom of the form are 'Program Code:' (a dropdown menu set to 'All') and 'Status:' (a dropdown menu set to 'ALL'). A blue 'Search' button is located at the bottom right of the form. The footer of the page includes the Lifeline logo, copyright information '© 2001 Lifeline Systems, Inc. All Rights Reserved', and a note 'This site created and hosted by Lifeline Systems Inc.' along with links for 'Contact Us', 'Terms & Conditions', 'Privacy Statement', 'Logout', 'Home', and 'Help'.

**Subscriber Search**  
To run a real time Subscriber report, follow the steps below.  
Subscriber data is stored for 90 days after deactivation.

**STEP 1: Enter search criteria and then hit 'Search' button.**  
Enter information in one of the fields below. If the search criteria are too broad and list too many subscribers, you will need to narrow your search.

**Home Phone#:**  -  -   
OR  
**Unit#:**   
OR  
**Last Name:**  (starts with, min 2 char)  
**AND (optional)**  
**First Name:**  (starts with)  
**City:**  (starts with)  
**Zip Code:**   
**Program Code:**  **Status:**

**Search**

[Contact Us](#) [Terms & Conditions](#) [Privacy Statement](#) [Logout](#) [Home](#) [Help](#)

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**Figure 3-20. Subscriber Search Form**

2. Enter search criteria in the Subscriber Search form (see *Subscriber Search* on page 50).

3. Click **Search**.

The Search Results page opens (Figure 3-21).

**CarePartners™ connect**  
your subscriber information connection

**Search Results**  
STEP 2: Select one Subscriber and then select a report below.

Use	Name	Address	Phone#	Program	Model	Unit#	Installation Date	Status
<input type="radio"/>	Brady, Tom	101 Lawrence Street Framingham, MA 01702	508-555-7771	MA990	9500	6761001208	02-01-2002	Active
<input type="radio"/>	Brown, Troy	21 Bear Street Van Buren, ME 04785	978-666-4444	MA990	9500	6524301109	02-02-2002	Active
<input type="radio"/>	Bruschi, Teddy	874 Beaver Lane Framingham, MA 01702	508-971-3811	MA990	9500	6305931411	02-01-2002	Active

**program reports**  
**subscriber reports**  
**change password**  
**logout**  
**help**

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**Care Plan** **Case History**  
[Contact Us](#) [Terms & Conditions](#) [Privacy Statement](#) [Logout](#) [Home](#) [Help](#)

**Figure 3-21. Search Results**

4. Click the desired button in the *Use* column to select a subscriber in the Search Results page.


If only one subscriber appears in the Search Results page, the button for that individual is already selected.

If necessary, scroll down the list of records with the scroll bar at the right-hand side of the Search Results.

5. Click **Care Plan** at the bottom of the page.

The Care Plan Agreement opens in the report window (Figure 3-22).

Contents First Prev Next Last Goto Page 1 of 2 100% Search Print/Save Export Help X

 **LIFELINE CARE PLAN AGREEMENT FORM** Page 1 of 2  
[Print Terms & Conditions](#)

<input type="checkbox"/> This is a <b>PARTIAL</b> Install (Must complete all fields outlined in bold)		<input type="checkbox"/> This is a <b>FOLLOW-UP</b> Install Number of pages included: 1 <input type="checkbox"/> or 2 <input type="checkbox"/>		Program Name <b>CPC Central Hospital</b>		Program Phone Number	
Program Code <b>MA990</b>	Model Type <b>9500</b>	Unit # <b>630-583-1411</b>	Household Phone # <b>(508) 971-3811</b>		Installation Date/Time <b>02/01/2002</b>		
Sabstation	Subscriber Last Name <b>Bruschi</b>		First Name <b>Teddy</b>		Middle	Suffix	
Preferred Name <b>Teddy Bruschi</b>		Last Name Sounds Like		Language Need? <input type="checkbox"/> Spanish <input type="checkbox"/> Other		Gender <input checked="" type="checkbox"/> Male <input type="checkbox"/> Female	Date of Birth <b>06/25/1969</b>
<b>Household Information</b>			<b>Emergency Phone Numbers</b> (Do not list 911 or 800 #s)				
Residential Street Address/Apt# <b>874 Beaver Lane</b>			Police		(508) 444-5555 0 -		
City <b>Framingham</b>	State <b>MA</b>	Zip Code <b>01702</b>	Fire		(508) 444-5555 0 -		
Township/Municipality		County	Ambulance		(508) 444-5555 0 -		
<b>Household Hidden Key Location</b>		<b>Directions To Home</b> (Must Be Provided If PO Box Listed)			<b>Additional Services</b>		
Under Superbowl Trophy next to front door.		Route 6 10 miles, 2nd farm house on left.			<input checked="" type="checkbox"/> Inactivity Alarm Service		
					<b>Special Instructions</b>		
					<input type="checkbox"/> State Funded		
					<input type="checkbox"/> Lifeline Smoke Detector		
<b>Drug Allergies</b>		<b>Medical Conditions and/or Diseases</b>			<b>Household Warning</b>		
		Masectomy; Brain Injury; Carpal Tunnel Syndrome					
<b>Responder One</b>		<b>Responder Two</b>		<b>Responder Three</b>			
Name (First/Last)		Name (First/Last)		Name (First/Last)			
Joe Stanton		Tom Swift					

Figure 3-22. Care Plan Agreement

## NOTE

The Care Plan Agreement contains the most up to date information in the subscriber database.



## Subscriber Search

Figure 3-23 shows the Subscriber Search form used to retrieve an individual's Care Plan Agreement or Case History.

The screenshot shows the 'Subscriber Search' form within the CarePartners Connect web application. The interface has a yellow header with the 'CarePartners connect' logo and tagline 'your subscriber information connection'. A left sidebar contains navigation links: 'program reports', 'subscriber reports' (highlighted), 'care plan agreement', 'case history', 'change password', 'logout', and 'help'. The main content area is titled 'Subscriber Search' and includes instructions: 'To run a real time Subscriber report, follow the steps below. Subscriber data is stored for 90 days after deactivation.' Below this, 'STEP 1: Enter search criteria and then hit 'Search' button.' is followed by a note: 'Enter information in one of the fields below. If the search criteria are too broad and list too many subscribers, you will need to narrow your search.' The search fields include: 'Home Phone#' (with a three-part input), 'OR', 'Unit#' (with a single input), 'OR', 'Last Name:' (with a single input and a note '(starts with, min 2 char)'), 'AND (optional)', 'First Name:' (with a single input and a note '(starts with)'), 'City:' (with a single input and a note '(starts with)'), 'Zip Code:' (with a single input), 'Program Code:' (a dropdown menu set to 'All'), and 'Status:' (a dropdown menu set to 'ALL'). A blue 'Search' button is located at the bottom right of the form. At the bottom of the page, there are links for 'Contact Us', 'Terms & Conditions', 'Privacy Statement', 'Logout', 'Home', and 'Help'. The footer includes the 'Lifeline' logo and copyright information: '© 2001 Lifeline Systems, Inc. All Rights Reserved. This site created and hosted by Lifeline Systems Inc.'

**Figure 3-23. Subscriber Search Form**

To search for a subscriber in the database, enter the subscriber's phone number, unit number, or last name. Enter just one of these three pieces of information. If you enter the subscriber's last name, you can, at your option, enter more information about the subscriber to narrow your search.

Listed below are some important items to note for each of the fields in the Subscriber Search form. Remember, only the subscriber's home phone number, unit number, or last name are required to conduct a search.

Home Phone	Enter the 10-digit phone number in the following format: xxx xxx xxxx.
Unit #	Enter all four or ten digits in the serial number of the subscriber's unit.
Last Name	Enter the first two or more letters of the subscriber's last name. The entry is not case-sensitive. For example, <i>Smith</i> or <i>smith</i> will find all subscribers with the last name of Smith.

If you enter the subscriber's last name as your primary search criterion, use the following fields to narrow your search:

First Name	Enter the letter or letters at the beginning of the subscriber's first name. The entry is not case sensitive. For example, <i>Craig</i> or <i>craig</i> will find all subscribers named Craig.
City	Enter the letter or letters at the beginning of the city you want to search on.
Zip Code	Enter all five digits of the zip code you want to search on.
Program Code	Select the program code from the drop down list.
Status	Select the subscriber's status from the drop down list.

After you have entered your search criteria information, click **Search** at the bottom of the form.

## NOTE

---

If your search criteria are too broad, the form returns the message, *Search has found too many rows. Please refine your search criteria.* Click **Try Again** in the dialog box to return to the Subscriber Search page. Enter as much specific information as you have about the subscriber you want to locate.

---

The numerical fields in the Subscriber Search form require an exact match. For these fields, enter each digit of the number required. The text fields do not require an exact match. For these fields, you can enter the entire word, or the first few letters of the word.

The ability to search with only part of a name can yield more subscribers than intended. Suppose you want to locate Clara Gold, and you enter *Gold* in the *Last Name* field. The locator searches the database for all people named Gold, as well as Goldstein, Goldsmith, Goldman, Golden, and so on. To narrow the search, enter the subscriber's first name (or other information) as well.

## **NOTE**

---

Information about a subscriber remains available for 90 days after deactivation. During that period, you can retrieve information for deactivated subscribers just as you would for an active subscriber.

---

## Report Window Functions

The Care Plan Agreement is only two pages long, but the page navigation buttons still operate as before:

First	Opens the first page in the document.
Prev	Opens the previous page. For example, click <b>Prev</b> to move from page 2 to page 1.
Next	Opens the next page. For example, click <b>Next</b> to move from page 1 to page 2.
Last	Opens the second and last page in the document.
Goto	Opens the page specified in the page field.

With the Care Plan Agreement, you can Save, Print, and Export, but not Search. Click **Print/Save** on the right side of the top menu bar to print or save the document from Acrobat Reader.

### NOTE

---

You can view and print the Terms and Conditions that accompany the subscriber's Care Plan Agreement. Click **Print Terms & Conditions** in the upper right-hand corner of either page 1 or 2 of the agreement to open the Terms and Conditions in Acrobat Reader. To print the document, click the printer icon in the Acrobat toolbar.

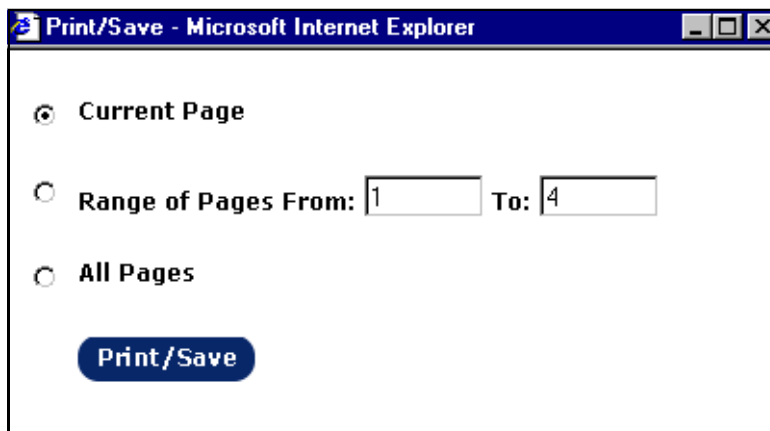
---

## How to Save a Care Plan

The procedure below explains how to save a Care Plan Agreement to your local hard drive as a PDF file:

1. Click **Print/Save** in the top menu bar of the report window.

The **Print/Save** dialog box opens (Figure 3-24).



**Figure 3-24. Print/Save Dialog Box**

2. Select one of three options:
  - Current page
  - Range of Pages From: \_\_\_\_ To: \_\_\_\_
  - All Pages
3. Click **Print/Save** at the bottom of the dialog box.

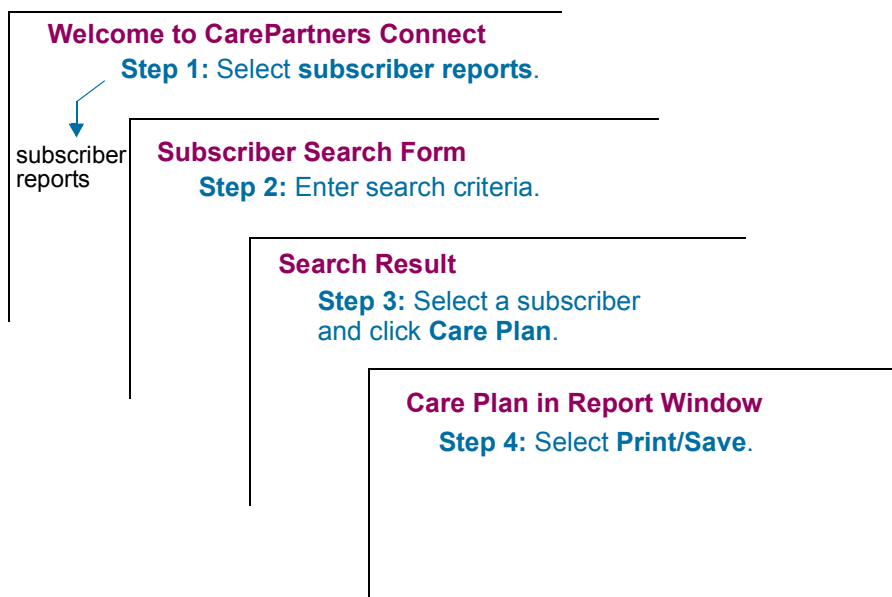
The selected pages open in Acrobat Reader.
4. Click the disk icon in the Acrobat toolbar.

The Save a Copy... dialog box opens.
5. Specify a folder and a filename for the PDF file.
6. Click **Save**.

The Save a Copy... dialog box closes.
7. Use Windows Explorer to verify that the file is saved in the proper location.

Figure 3-25 shows the steps required to open a Care Plan Agreement and save it to your hard drive.

## How to Open a Care Plan



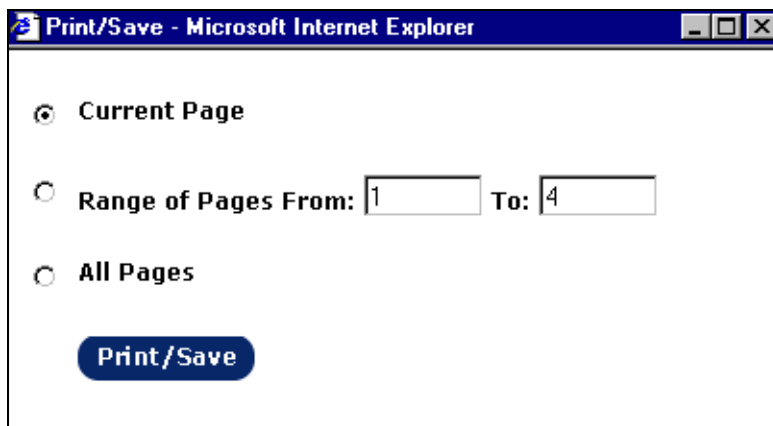
**Figure 3-25. Open a Care Plan Agreement**

## How to Print a Care Plan

To print a Care Plan:

1. Click **Print/Save** in the top menu bar of the report window.

The **Print/Save** dialog box opens (Figure 3-26).

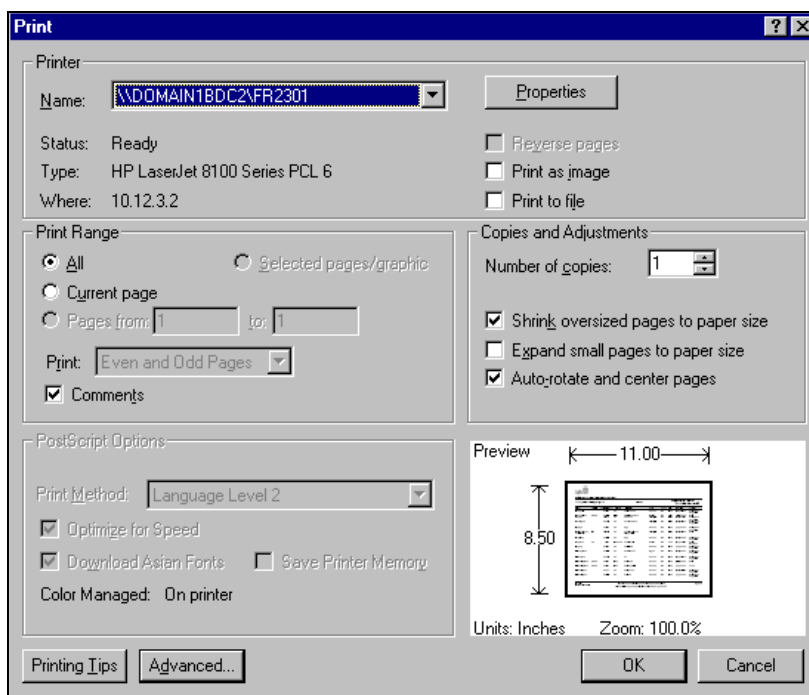


**Figure 3-26. Print/Save Dialog Box**

2. Select one of three options:
  - Current page
  - Range of Pages From: \_\_\_\_ To: \_\_\_\_
  - All Pages
3. Click **Print/Save** at the bottom of the dialog box.

The selected pages open in Acrobat Reader.
4. Click the printer icon in the Acrobat toolbar.

The Print dialog box opens (Figure 3-27).



**Figure 3-27. Print Dialog Box**

5. Verify that the settings in the Print dialog box are correct.
6. Click **OK**.

The report is sent to the printer and the dialog box closes.

## NOTE

You can view, print, and save the Terms and Conditions that subscribers agree to when they sign the Care Plan Agreement. Click **Terms & Conditions** in the upper right-hand corner of the Care Plan Agreement in the report window. The Terms and Conditions open as a new PDF file in a separate Acrobat window. Then print or save the document from the Acrobat Reader toolbar. The Terms and Conditions are the latest Terms and Conditions, and may not be the version signed by the subscriber upon installation.



## Case History

The Case History provides details of each incident and each administrative action during the user specified reporting period. It contains full case notes for each subscriber from check-in, to maintenance, to incident reports. Entries are in chronological order, oldest case first.

## How to Open a Case History

To open a Case History:

1. Click **subscriber reports** in the side menu bar of the Welcome page.

The Subscriber Search form opens (Figure 3-28).

The screenshot shows the CarePartners Connect web application interface. On the left is a vertical sidebar with a blue header and yellow background. It contains the following links: 'program reports', 'subscriber reports' (highlighted with a red underline), 'care plan agreement', 'case history', 'change password', 'logout', and 'help'. At the bottom of the sidebar is the Lifeline logo and copyright information: '© 2001 Lifeline Systems, Inc. All Rights Reserved. This site created and hosted by Lifeline Systems Inc.' The main content area has a yellow header with the CarePartners Connect logo and tagline 'your subscriber information connection'. Below the header is the 'Subscriber Search' section. It includes instructions: 'To run a real time Subscriber report, follow the steps below. Subscriber data is stored for 90 days after deactivation.' and 'STEP 1: Enter search criteria and then hit 'Search' button. Enter information in one of the fields below. If the search criteria are too broad and list too many subscribers, you will need to narrow your search.' The search fields are: 'Home Phone#:' with three input boxes separated by dashes; 'OR'; 'Unit#:' with one input box; 'OR'; 'Last Name:' with one input box and a note '(starts with, min 2 char)'; 'AND (optional)'; 'First Name:' with one input box and a note '(starts with)'; 'City:' with one input box and a note '(starts with)'; 'Zip Code:' with one input box; 'Program Code:' with a dropdown menu showing 'All'; and 'Status:' with a dropdown menu showing 'ALL'. A blue 'Search' button is located at the bottom right of the search fields. At the bottom of the page are links: 'Contact Us', 'Terms & Conditions', 'Privacy Statement', 'Logout', 'Home', and 'Help'.

**CarePartners<sup>TM</sup> connect**  
your subscriber information connection

**Subscriber Search**  
To run a real time Subscriber report, follow the steps below.  
Subscriber data is stored for 90 days after deactivation.

**STEP 1: Enter search criteria and then hit 'Search' button.**  
Enter information in one of the fields below. If the search criteria are too broad and list too many subscribers, you will need to narrow your search.

**Home Phone#:**  -  -

OR

**Unit#:**

OR

**Last Name:**  (starts with, min 2 char)

**AND (optional)**

**First Name:**  (starts with)

**City:**  (starts with)

**Zip Code:**

**Program Code:**  **Status:**

**Search**

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Figure 3-28. Subscriber Search Form

2. Enter search criteria in the Subscriber Search form.

3. Click **Search**.

The Search Results page opens (Figure 3-29).

**CarePartners™ connect**  
your subscriber information connection

**Search Results**  
STEP 2: Select one Subscriber and then select a report below.

Use	Name	Address	Phone#	Program	Model	Unit#	Installation Date	Status
<input type="radio"/>	Brady, Tom	101 Lawrence Street Framingham, MA 01702	508-555-7771	MA990	9500	6761001208	02-01-2002	Active
<input type="radio"/>	Brown, Troy	21 Bear Street Van Buren, ME 04785	978-666-4444	MA990	9500	6524301109	02-02-2002	Active
<input type="radio"/>	Bruschi, Teddy	874 Beaver Lane Framingham, MA 01702	508-971-3811	MA990	9500	6305831411	02-01-2002	Active

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**Figure 3-29. Search Results**

4. Select a subscriber in the *Use* column of the Search Results page.

5. Click **Case History** at the bottom of the page.

The Date Range Selection page opens (Figure 3-30).

**CarePartners<sup>TM</sup> connect**  
your subscriber information connection

[program reports](#)  
[subscriber reports](#)  
[change password](#)  
[logout](#)  
[help](#)

**Date Range Selection**

Case History report for: Bruschi, Teddy

**STEP 3:** Specify a date range and then hit 'View Report' button.

☐ **Today**  
☐ **Within the last 7 days**  
☐ **User defined date range**

**Start Date:** / /  **End Date:** / /

Date range must be within 90 days

[View Report](#)

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**Figure 3-30. Date Range Selection**

6. Specify a time period in the Date Range Selection page.

The Date Range Selection page contains three options:

- *Today* – Case history data since midnight of the current day.
- *Within the last 7 days* – Case history data for the past week.
- *User defined date range:*

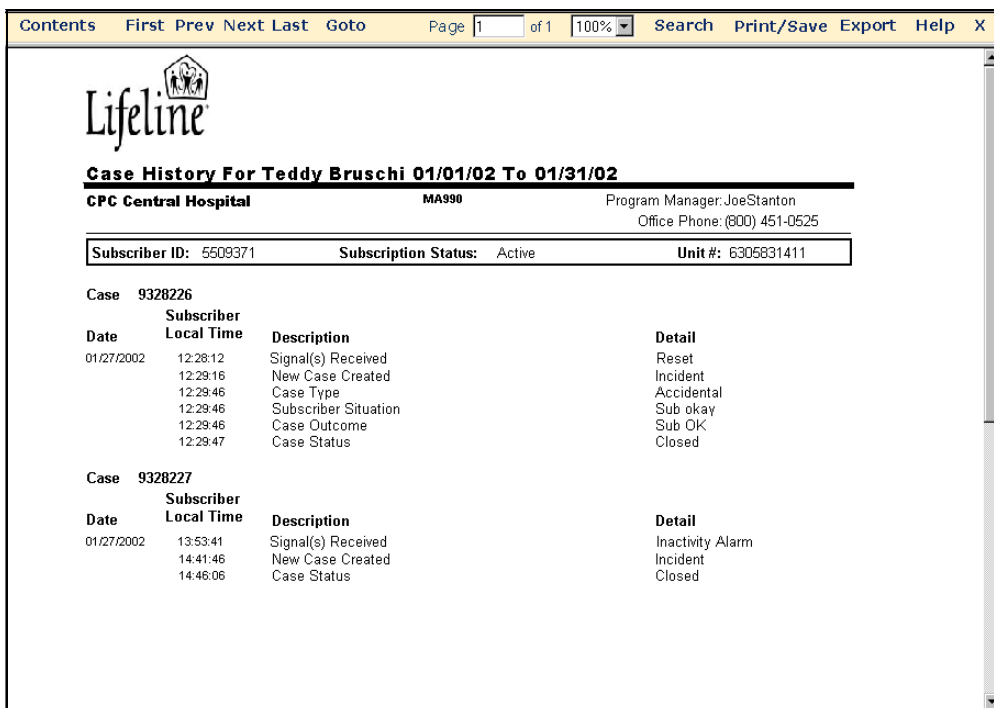
*Start Date* – Enter a start date in mm/dd/yyyy format.

*End Date* – Enter an end date in mm/dd/yyyy format.

Both the start date and the end date must be within the last 90 days.

7. Click **View Report**.

The Case History for the period you selected opens in the report window (Figure 3-31).



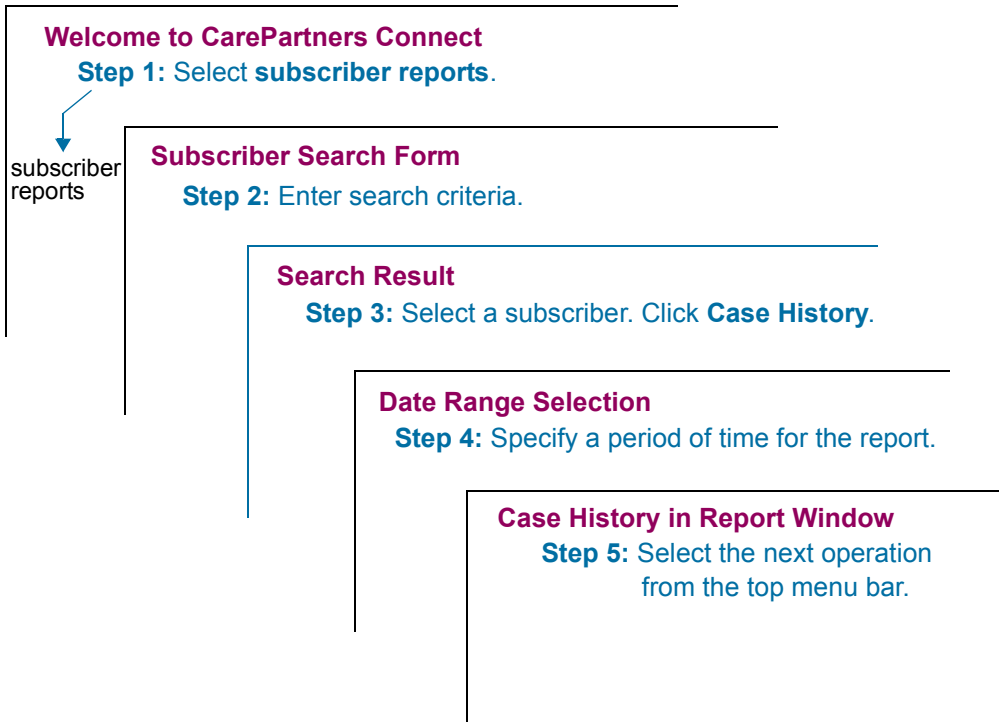
**Figure 3-31. Case History**

**NOTE**

The Case History contains the latest information in the subscriber database. Use this report to verify a recent incident or to verify a check-in call.

Figure 3-32 summarizes how to open a Case History.

## How to Open a Case History



**Figure 3-32. Open a Case History**

## Report Window Functions

The page navigation buttons are:

First	Opens the first page in the document.
Prev	Opens the previous page. For example, click <b>Prev</b> to move from page 80 to page 79.
Next	Opens the next page. For example, click <b>Next</b> to move from page 80 to page 81.
Last	Opens the last page in the document.
Goto	Opens the specified page. For example, type the numeral 4 in the <i>Page</i> field of the top menu bar. Then click <b>Goto</b> . Page 4 of the report opens in the report window.

### NOTE

---

You can print and save a case history from Acrobat Reader. You cannot search a case history or export the case notes to a .csv file.

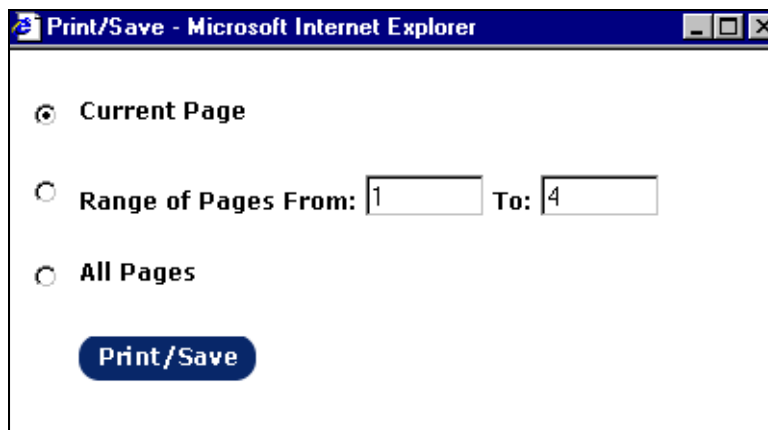
---

## How to Save a Case History

To save a Case History as a PDF document:

1. Click **Print/Save** in the top menu bar of the report window.

The **Print/Save** dialog box opens (Figure 3-33).



**Figure 3-33. Print/Save Dialog Box**

2. Select one of three options:
  - Current page
  - Range of Pages From: \_\_\_\_ To: \_\_\_\_
  - All Pages
3. Click **Print/Save** at the bottom of the dialog box.

The selected pages open in Acrobat Reader.
4. Click the disk icon in the Acrobat toolbar.

The Save a Copy... dialog box opens.
5. Specify a folder and a filename for the PDF file.
6. Click **Save**.

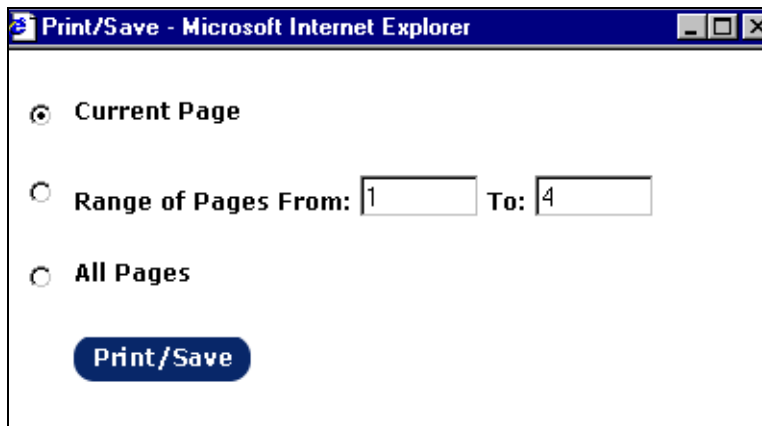
The Save a Copy... dialog box closes.
7. Use Windows Explorer to verify that the file is saved in the proper location.

## How to Print a Case History

To print a Case History:

1. Click **Print/Save** in the top menu bar of the report window.

The **Print/Save** dialog box opens (Figure 3-34).



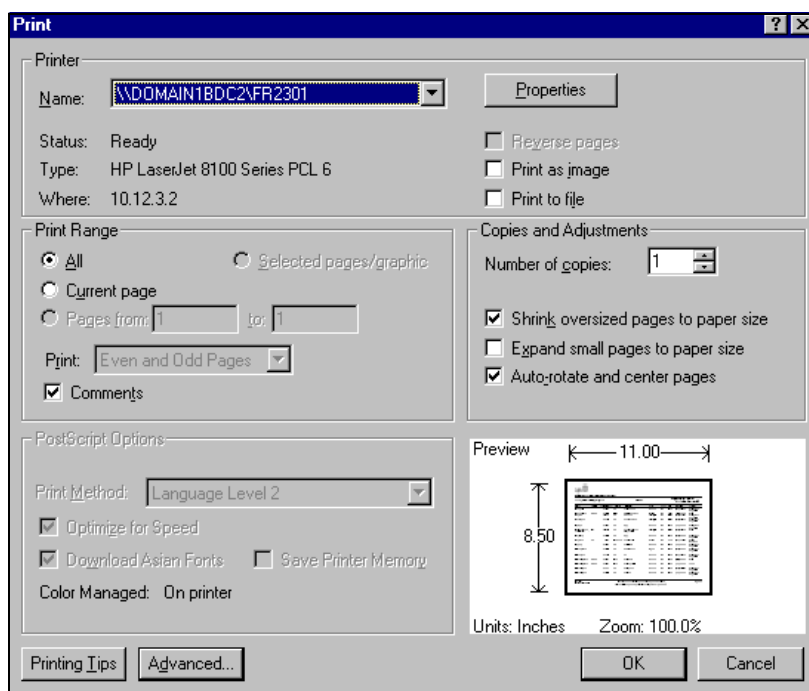
**Figure 3-34. Print/Save Dialog Box**

2. Select one of three options:
    - Current page
    - Range of Pages From: \_\_\_\_ To: \_\_\_\_
    - All Pages
  3. Click **Print/Save** at the bottom of the dialog box.
- The selected pages open in Acrobat Reader.



4. Click the printer icon in the Acrobat toolbar.

The Print dialog box opens (Figure 3-35).



**Figure 3-35. Print Dialog Box**

5. Verify that the settings in the Print dialog box are correct.

6. Click **OK**.

The report is sent to the printer and the dialog box closes.

---

## A. Reference Information

Appendix A contains reference information in these areas:

- *General Information*
- *Acrobat Reader*
- *Site Map*
- *System Availability*
- *Program Support*

### General Information

The bottom of every page in CarePartners Connect contains several links. Click **Contact Us** to open the Contact Us page (Figure A-2 on page 71). From there, you can:

- E-mail your questions to Customer Service.
- Open a listing of contact information for key Lifeline departments.
- Send an e-mail to Lifeline with ideas for improving CarePartners Connect.

The links at the bottom of every page in CarePartners Connect also include:

- Click **Terms & Conditions** to read the User Agreement, as well as material on privacy of information, limitations of liability, copyrights, and trademarks. You must accept the Terms & Conditions the first time you log in to CarePartners Connect.
- Click **Privacy Statement** to read the parts of your agreement that pertain to the privacy of your information, and to confidential information about your subscribers.
- Click **Logout** to exit CarePartners Connect.
- Click **Home** to return to the page titled Welcome to CarePartners Connect. You can also click the CarePartners Connect logo on each page to return home.
- Click **Help** to open the *Guide to CarePartners Connect* in Adobe Acrobat.

---

**NOTE**

To print or save the Terms and Conditions or the Privacy Statement, click the link that appears at the top of the scroll box on each page. The document opens in Acrobat Reader. Then use the Acrobat toolbar to print or save the document.

---

## Acrobat Reader

The Welcome to CarePartners Connect page has a link to Adobe to download the free Acrobat Reader. You do not need the reader to view CarePartners Connect reports on line. If however you want to save or print a report as a PDF file, you need the viewer to see the saved report. If you send a report as a PDF document to another person, the recipient needs the Acrobat reader to view the report.

## System Availability

Availability of Lifeline's online reporting system depends on its operation and maintenance schedule. These particulars may change without notice. (Times listed are Eastern time.)

- CarePartners Connect system hours are from 6:00 A.M. to midnight every day, Eastern time.
- The system may be accessible from midnight to 6:00 A.M. Eastern time, but those hours are reserved if necessary for maintenance.
- Planned upcoming maintenance is listed on the CarePartners Connect Welcome page.
- The previous day's program reports are available at 7:00 A.M. Eastern time.
- Customer Service support hours stay the same: Monday through Friday from 8:00 A.M. to 8:30 P.M., Saturday from 9:00 A.M. to 5:30 P.M. Eastern time.

## Site Map

The site map in Figure A-1 on page 70 shows how the parts of CarePartners Connect work together. Refer to the online version of the *Guide to CarePartners Connect* to use the color keys in the legend below:

- Black and White – General information and enrollment
- Red – Information and site administration
- Brown – Access to CarePartners Connect
- Light Blue – Program Reports
- Blue – Subscriber Reports

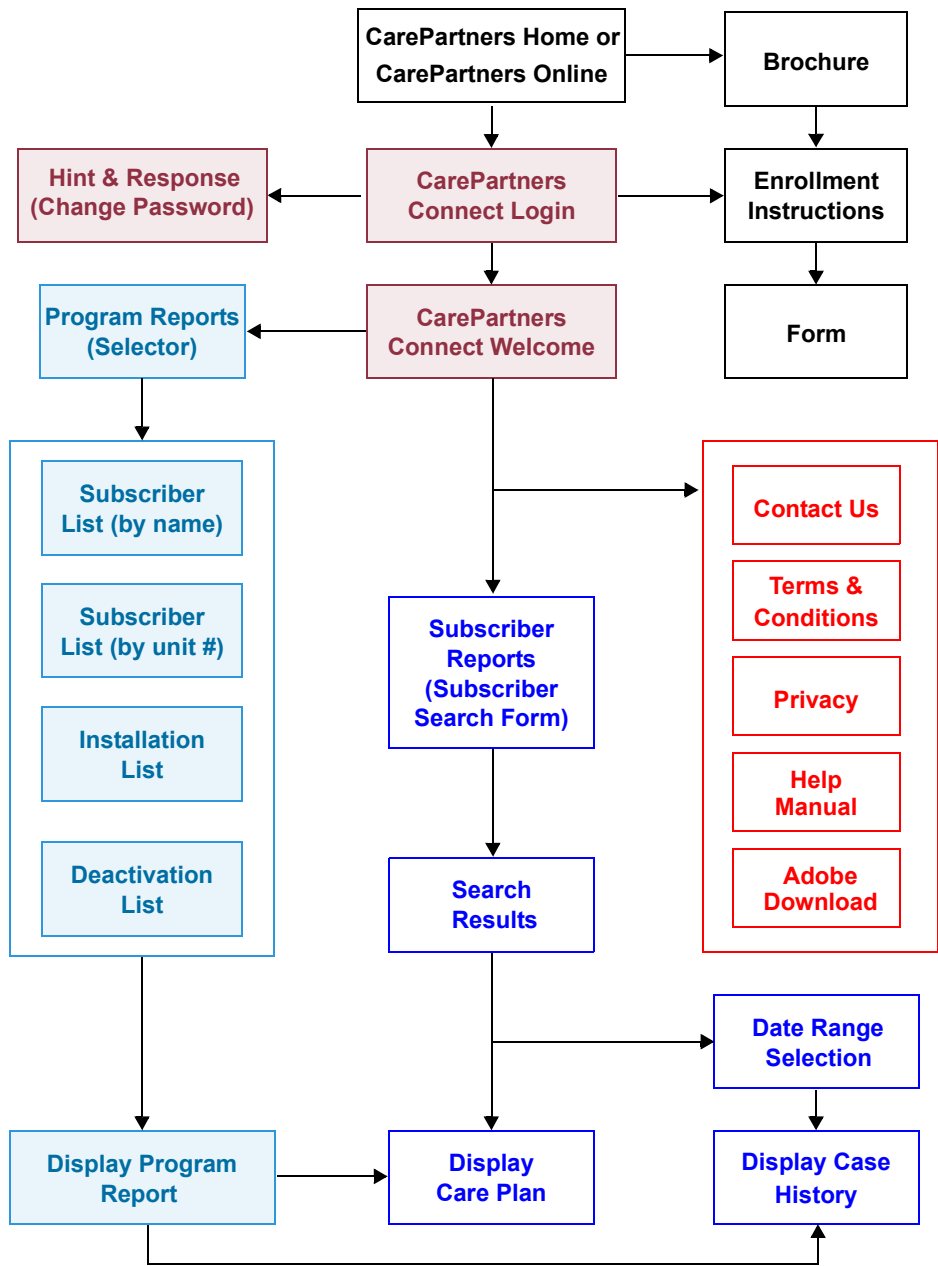


Figure A-1. CarePartners Connect Site Map

## Program Support

Lifeline provides three sources of support for CarePartners Connect:

- First is this help document, available on line.
- The second is e-mail. Click **Contact Us** on any page of CarePartners Connect, then click the first link on the Contact Us page (Figure A-2). The e-mail address is [CPCservice@Lifelinesys.com](mailto:CPCservice@Lifelinesys.com).
- The third resource is to call Lifeline Customer Service at 800-852-5433.

If you need assistance with any matter concerning CarePartners Connect or with Lifeline's reports, please use these three sources of help.

**CarePartners<sup>TM</sup> connect**  
your subscriber  
information connection

**Contact Us**  
For questions relating to the use and content of CarePartners Connect, please contact Customer Service.

Email: [Click here to email questions to Customer Service.](#)  
or send email to [CPCService@Lifelinesys.com](mailto:CPCService@Lifelinesys.com)

Phone: 1-800-451-0525  
Fax: 1-877-384-5226

**Lifeline Contact information**  
[Click here for further information.](#)

**CarePartners Connect Feedback?**  
[Click here to email us ideas on improving this system.](#)  
or send email to [CPCIdeas@Lifelinesys.com](mailto:CPCIdeas@Lifelinesys.com)

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Figure A-2. Contact Us

---

## B. Frequently Asked Questions

The questions and answers below cover some common tasks you'll want to accomplish through CarePartners Connect. Click the page references to open the relevant part of the guide.

**After I receive my user name and password from Lifeline, how do I log into CarePartners Connect for the first time?**

Go to [www.CarePartnersConnect.com](http://www.CarePartnersConnect.com). Then enter your user name and generic password at the CarePartners Connect login page and follow the on screen instructions. See page 6.

**How do I search a report for a single subscriber?**

Click **Search** in the top menu bar of the report window. See page 32.

**How do I change my password?**

Click **change password** in the side menu bar. See page 14.

**How do I check the notes for an incident in a subscriber's case history?**

Locate the individual through a program report or a subscriber search and open the individual's Case History. See page 58.

**How do I find a subscriber's phone number, or some other key piece of information?**

You can find much information in the subscriber lists or the Care Plan Agreement. To obtain subscriber information without opening a report window, use the Subscriber Search form to find the subscriber's record. Then take the required information from the Search Results table. See page 32, page 47, or page 50.

**How do I enroll a new user who works as a volunteer in my program?**

E-mail [CPCservice@Lifelinesys.com](mailto:CPCservice@Lifelinesys.com) or call Lifeline at 800-852-5433 to obtain the correct enrollment form.

### **How do I send subscriber data to the people who work with me?**

Save the data in a PDF file. If you are in a secure environment, e-mail the file as an attachment. If not, print the file and fax or hand-deliver it. See page 35, page 38, and page 68.

### **How do I print a monthly report?**

Print the report from Acrobat. See page 38.

### **How do I export my subscriber data to a spreadsheet?**

Open a report and click **Export** in the top menu bar of the report window to export a comma delimited file to Excel or another application. See page 37.

### **How do I determine whether a subscriber is still active or not?**

Use the Subscriber Search form to locate the subscriber. Then check the Status column on the right-hand side of the Search Results table to determine whether the subscriber is active. See page 50 and page 48.

Or, open the subscriber list, locate the subscriber, and check the subscriber status column. See page 25 and page 32.

### **How do I scan through the data for all the subscribers in my program?**

Open the subscriber list and use the navigation tools to page through the data in the report window. See page 30.

### **How do I print a copy of this guide?**

Click **Help** anywhere in CarePartners Connect to open the guide in Acrobat, then print the guide from Acrobat. See page 2.

### **How do I determine how many subscribers signed up last month?**

Open the installation list that covers the desired interval. The last page of the report lists the total number of installations for that month. See page 40.



### **How do I archive my reports?**

Create one or more archive folders on your hard drive and use them to store old reports as PDF files. You can review reports stored in these folders without having to log in to CarePartners Connect. CarePartners Connect keeps reports available on line for twelve months. See page 35.

### **How do I control who sees confidential subscriber data?**

Careful administration of the passwords in your program makes your subscriber data secure. See page 12 and page 13.

### **How do I get the Acrobat Reader?**

You can download the program from [www.adobe.com](http://www.adobe.com). Click the Adobe Acrobat link on the Welcome to CarePartners Connect page. See page 68.

### **Can I log in to CarePartners Connect at any time?**

The period from midnight to 6:00 A.M. is reserved for system maintenance. The site may not be available during those hours. See page 68.

### **How do I contact Lifeline for questions not answered in this guide?**

E-mail [CPCservice@Lifelinesys.com](mailto:CPCservice@Lifelinesys.com) or call Lifeline Customer Service at 800-852-5433.