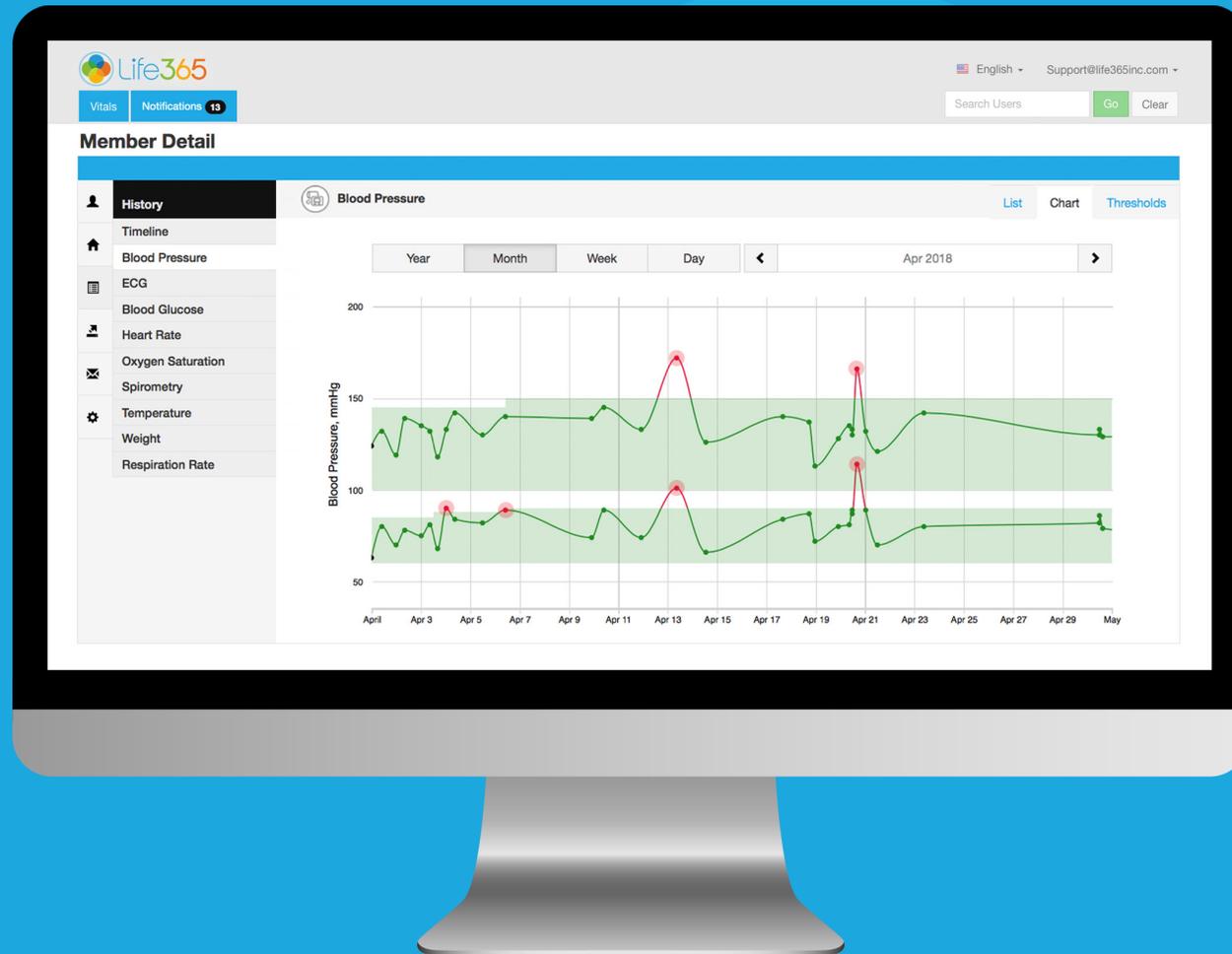


# Your Guide to Life365's Online Portal



MANAGER: MANAGE ACCOUNTS

# Manager Portal Core Functions

- 1 Create, Edit, & Delete: Managers, Coordinators, & Members
- 2 Assign & Remove Members from Coordinators
- 3 Assign & Remove Coordinators from Members
- 4 Review Statistics

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# Create Manager Account

The screenshot shows the Life365 web interface. At the top, the Life365 logo is on the left, and three navigation tabs are on the right: 'Users', 'Managers', and 'Statistics'. The 'Managers' tab is highlighted with an orange box and labeled 'A'. Below the navigation bar, the 'Managers' section is visible. A blue button labeled '+ New Manager' is highlighted with an orange box and labeled 'B'. Below this button, there is a form with the following fields: 'Email' (containing 'Support@life365inc.com'), 'Member', and 'Manage'. A modal window titled 'New Manager' is overlaid on the bottom right of the main interface. It has a blue header with 'Managers / New Manager'. The main title is 'New Manager'. There is an 'Email' label and a text input field. Below the input field is a green button labeled 'Create', which is highlighted with an orange box and labeled 'C'.

Create a Manager account by selecting the Managers Tab **(A)**.

Select +New Manager **(B)**.

Enter a valid email address and select Create **(C)**.

*Manager will receive a password setup email.*

*Follow the instructions detailed to create a password.*

# Create Coordinator Account

Users

+ New User **B** **A** Coordinators Members

Name ▲	Email ▲	Phone	Observes	Last activity ▲
Emily Fellows	efellows@life365.health	480-567-7891	3 medical records	about 5 hours ago
Mary Morris	mmorris@life365.health	602-456-9321	1 medical record	3 months ago
Richard Hayes	rhayes@life365.health	602-123-4567	3 medical records	about 1 year ago
Lisa Gonzales	lgonzales@life365.health	480-876-5432	5 medical records	6 months ago

In Users, select the Coordinator tab **(A)**.

Select +New User **(B)**.

Enter information for all fields listed.

Select Create **(C)**.

**NOTE:** *Enter a valid email address.*

*Coordinator will receive a **password setup email**.  
Follow the instructions detailed to create a password.*

Users / New User

### New User

Category  Coordinator  Member

\* Email

First Name

Last Name

Phone

Report Contact Information

Group

Site

Gender  Female  Male  Other  Not Applicable

Date of Birth Year  Month  Day

Height  ft.  in.

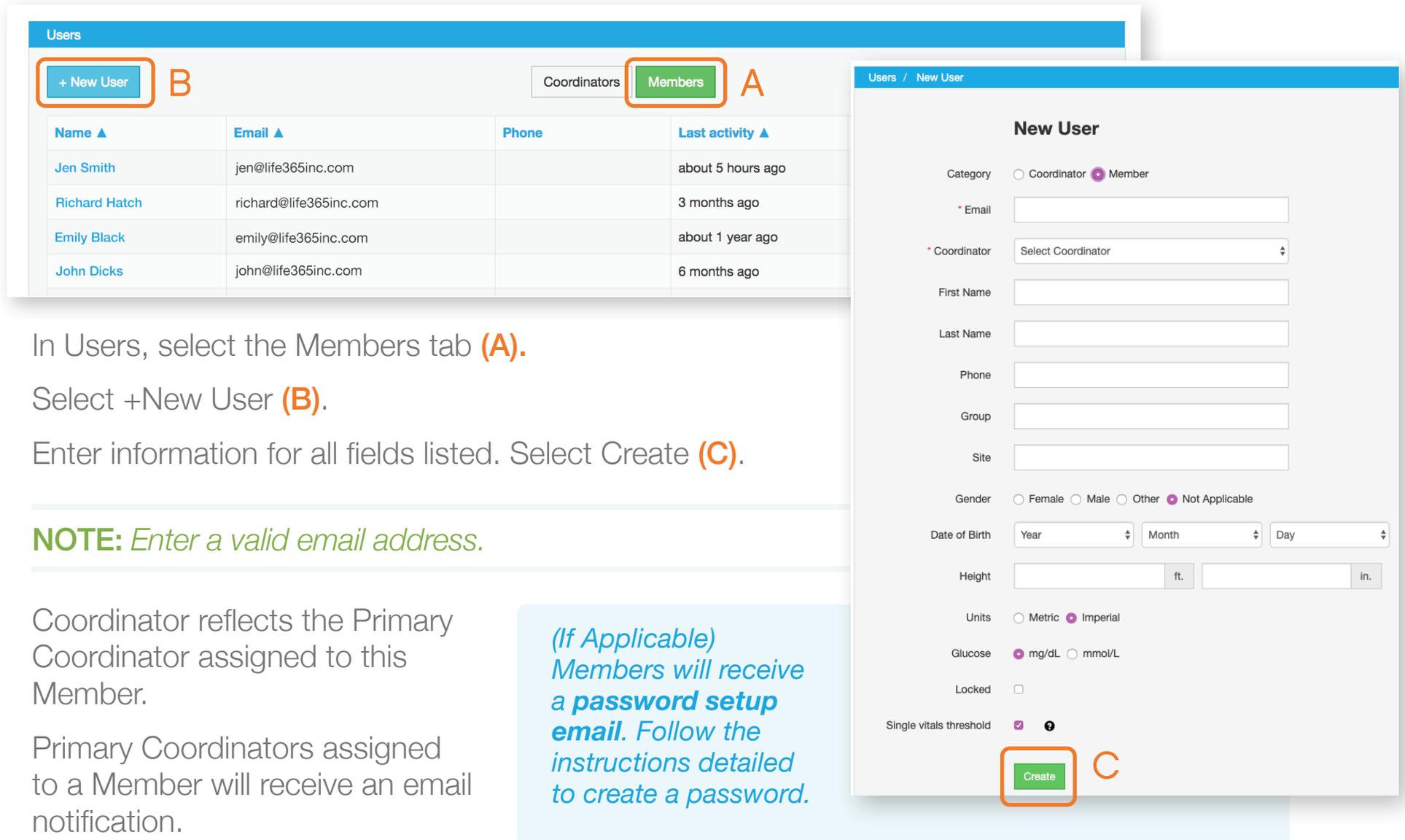
Units  Metric  Imperial

Glucose  mg/dL  mmol/L

Locked

**Create** **C**

# Create Member Account



In Users, select the Members tab (A).

Select +New User (B).

Enter information for all fields listed. Select Create (C).

**NOTE:** *Enter a valid email address.*

Coordinator reflects the Primary Coordinator assigned to this Member.

Primary Coordinators assigned to a Member will receive an email notification.

*(If Applicable) Members will receive a password setup email. Follow the instructions detailed to create a password.*

Name ▲	Email ▲	Phone	Last activity ▲
Jen Smith	jen@life365inc.com		about 5 hours ago
Richard Hatch	richard@life365inc.com		3 months ago
Emily Black	emily@life365inc.com		about 1 year ago
John Dicks	john@life365inc.com		6 months ago

**New User**

Category  Coordinator  Member

\* Email

\* Coordinator

First Name

Last Name

Phone

Group

Site

Gender  Female  Male  Other  Not Applicable

Date of Birth Year  Month  Day

Height  ft.  in.

Units  Metric  Imperial

Glucose  mg/dL  mmol/L

Locked

Single vitals threshold

**Create**

# Create Member Account : Single Vitals Threshold

Users / New User

### New User

Category  Coordinator  Member

\* Email

\* Coordinator

First Name

Last Name

Phone

Group

Site

Gender  Female  Male  Other  Not Applicable

Date of Birth

Height  ft.  in.

Units  Metric  Imperial

Glucose  mg/dL  mmol/L

Locked

Single vitals threshold  ⓘ

Create

For only Primary Coordinators to create threshold parameters for a Member, enable the **Single Vitals Threshold** option.

For Primary & all Secondary Coordinators to create threshold parameters for a Member, disable the **Single Vitals Threshold** option.

**NOTE:** *If all Coordinators are granted access to create threshold parameters for Members, the most recent threshold parameters created will reflect for all Coordinators monitoring that Member.*

# Create Member Account (Cont.)

The screenshot displays the user management interface. At the top, there are tabs for 'Users', 'Managers', and 'Statistics'. A search bar labeled 'Search Users' with a 'Go' button is highlighted with an orange box and labeled 'A'. Below the search bar, there is a '+ New User' button and tabs for 'Coordinators' and 'Members'. A table lists users with columns for Name, Email, Phone, and Last active. The name 'Jen Smith' is highlighted with an orange box and labeled 'B'. To the right of the table, a sidebar menu has 'Management Details' highlighted with an orange box and labeled 'C'. The 'Management Details' form includes fields for Date of Birth (Year, Month, Day), Gender (Female, Male, Other, Not Applicable), Preferred Language, Condition, Units (Metric, Imperial), Glucose (mg/dL, mmol/L), Locked, Height (ft, in), Weight (lbs), Admission Status (None, Admitted), and Single vitals threshold. A 'Save' button is highlighted with an orange box and labeled 'D'.

Name ▲	Email ▲	Phone	Last active
Jen Smith	jen@life365inc.com		about 5 hours
Richard Hatch	richard@life365inc.com		3 months
Emily Black	emily@life365inc.com		about 1 year
John Dicks	john@life365inc.com		6 months

**Management Details**

Date of Birth: Year [dropdown], Month [dropdown], Day [dropdown]

Gender:  Female  Male  Other  Not Applicable

Preferred Language: [text input]

Condition: [text area]

Units:  Metric  Imperial

Glucose:  mg/dL  mmol/L

Locked:

Height: [text input] ft. [text input] in.

Weight: [text input] lbs.

Admission Status:  None  Admitted

Single vitals threshold:  ⓘ

Save

Complete Member Account set-up by searching the newly created Member within the Search Users bar (A).

Select the Members Name (B).

Select tab Management Details (C).

Enter information for all fields listed.  
Select Save (D).

# Edit Manager Email

Life365

English admin@life365inc.com

Users Managers Statistics

Search Users Go

+ New Manager

Email	Actions
Support@life365inc.com	
Member@life365inc.com	
Manager@life365inc.com	

Search Manager account to edit email address within the Search Users bar.

In the Actions column, select the pencil icon.

Update email address within the required field. Select Save.

Managers / Support@life365.health / Edit Managers

### Edit Manager

Email

Locked

Save

# Edit Coordinator Account

The screenshot shows the 'Users' management page with a search bar and a table of users. The 'Users' tab is selected, and the 'Search Users' bar is highlighted with a red box (B). The 'Coordinators' tab is selected in the table, highlighted with a red box (A). The name 'Emily Fellows' is highlighted in the table, with a red box (C). The 'Profile' tab is selected, and the 'Save' button is highlighted with a red box (D).

Name ▲	Email ▲	Phone	Observes	Last a
Emily Fellows	efellows@life365.health	480-567-7891	3 medical records	about
Mary Morris	mmorris@life365.health	602-456-9321	1 medical record	3 mon
Richard Hayes	rhayes@life365.health	602-123-4567	3 medical records	about
Lisa Gonzales	lgonzales@life365.health	480-876-5432	5 medical records	6 mon

**Profile**

Category  Coordinator  Member

\* Email

First Name

Last Name

Phone

Report Contact Information

Group

Site

Locked

In **Users**, select the Coordinator tab (A).

Search Coordinator account to edit within the Search Users bar (B).

Select the Name of Coordinator (C).

In **Profile** tab, update information within appropriate fields listed. Select Save (D).

# Edit Coordinator Account : Reset Password

Users / efellows@life365.health / Profile

Manage Members

Profile

### Profile

Category  Coordinator  Member

\* Email

First Name

Last Name

Phone

Report Contact Information

Group

Site

Locked

Save

Send password reset instructions Delete

Coordinator forgotten account password? Select the **Send password reset instructions** button for a Coordinator to reset account password.

Coordinators will receive a password reset email.

# Edit Member Account: Profile

The image shows two overlapping screenshots of the Life365 user management interface. The top screenshot shows the 'Users' management page with the 'Members' tab selected. The bottom screenshot shows the 'Profile' page for the user 'Jen Smith'.

**Users Management Page:**

- Navigation tabs: Users, Managers, Statistics
- Search bar: Search Users (B) with a Go button
- Buttons: + New User, Coordinators, Members (A)
- Table of users:

Name ▲	Email ▲	Phone	Last activity ▲
Jen Smith (C)	jen@life365inc.com		about 5 hours ago
Richard Hatch	richard@life365inc.com		3 months ago
Emily Black	emily@life365inc.com		about 1 year ago
John Dicks	john@life365inc.com		6 months ago

**Profile Page:**

- Breadcrumbs: Users / jsmith@life365.health / Profile
- Profile tabs: Profile, Care Team, Management Details, Notes
- Category:  Coordinator  Member
- \* Email: jsmith@life365.health
- First Name: Jen
- Last Name: Smith
- Phone: 602-123-4567
- Group: Life365, Inc.
- Site: Scottsdale, AZ
- Locked:
- Buttons: Save (D), Send password reset instructions, Delete

In **Users**, select the Members tab (A).

Search Coordinator account to edit within the Search Users bar (B).

Select the Name of Member (C).

In **Profile** tab, update information within appropriate fields listed. Select Save (D).

# Edit Member Account (Cont.)

**Management Details**

Date of Birth: Year [dropdown] Month [dropdown] Day [dropdown]

Gender:  Female  Male  Other  Not Applicable

Preferred Language: [text input]

Condition: [text input]

Units:  Metric  Imperial

Glucose:  mg/dL  mmol/L

Locked:

Height: [text input] ft. [text input] in.

Weight: [text input] lbs.

**H** Admission Status:  None  Admitted

Single vitals threshold:  ⓘ

**B** [Save]

Select the Management Details tab (A).

Update information within appropriate fields listed. Select Save (B).

**NOTE:** Notify Coordinators and Managers when a Member is admitted to Hospital by enabling the Admission Status to **Admitted**.

Members admitted to hospital will display the icon **H** in the Coordinator Portal to reflect admission status.

Both Coordinators and Managers can alter the admission status within the Members profile.

# Edit Member Account: Notes

The screenshot shows a web interface for editing a member account. On the left is a sidebar with four tabs: 'Profile', 'Care Team', 'Management Details', and 'Notes'. The 'Notes' tab is highlighted with an orange box and labeled 'A'. The main content area has a large text input field at the top, labeled 'B'. Below this field is a green 'Save' button, labeled 'C'. Below the Save button, two notes are listed. The first note is 'Emily Fellows, 02/05/2020 12:17' with the text '5 minutes phone call - searched healthy recipes for 15 minutes. 1:05pm - 1:10pm'. The second note is 'Emily Fellows, 01/26/2020 09:22' with the text 'Patient had questions about the new medication's side effects.'

**NOTE:** Both Managers & Coordinators can create notes within a Members profile. All notes created will reflect within the Coordinator Portal (& vice-versa).

To record notes, select the Notes tab (A).

Enter notes within the field box (B). Once notes are created, select Save (C).

Created notes will display in the provided space below with the following details:

- Name of Coordinator &/or Manager who created note
- Date & Time note was created

# Edit Member Account: **Reset Password**

Users / jsmith@life365.health / Profile

Profile

Care Team

Management Details

Notes

### Profile

Category  Coordinator  Member

\* Email

First Name

Last Name

Phone

Group

Site

Locked

Save

Send password reset instructions Delete

Member forgotten patient portal password? Select the **Send password reset instructions** button within the Members Profile to reset account password.

Members will receive a password reset email.

# Assign Coordinators to Members

Profile

Care Team **A**

Management Details

Notes

Primary Coordinator Paulina Briggs

**Supporting Coordinators assigned to 1967-Life365-Test**

	Remove all
Paulina Briggs	-
Catie Blue	-

**Coordinators available**

Search Users	Add all
Cynthia McManus	+
Gilbert Tholmpson	+
Harrison Chen	+
Ellen Brady	+

Save **B**

**NOTE:** Primary & Secondary Coordinators assigned to a Member will be notified via email.

Assign Coordinators to monitor a Member by selecting the Care Teams tab **(A)**.

Managers can complete the following actions:

- **Change Primary Coordinator for Member**
- **Remove all or individually remove supporting Coordinators assigned to monitor Member**
- **Add all or individually add available Coordinators to assign and monitor Member**

Select Save **(B)**.

# Assign Members to Coordinators

The screenshot displays the 'Users' management interface. At the top, there are tabs for 'Users', 'Managers', and 'Statistics'. A search bar labeled 'Search Users' with a 'Go' button is highlighted with an orange box and labeled 'A'. Below the tabs, there is a '+ New User' button and a table of users. The 'Name' column of the table is highlighted with an orange box and labeled 'C', showing 'Emily Fellows' and 'Mary Morris'. To the right of the table, there are buttons for 'Coordinators' (highlighted with an orange box and labeled 'A'), 'Members', 'All', 'Locked', and 'Active'. A modal window titled 'Manage Members' is open, showing a 'Profile' tab and two columns: 'Medical records observed' and 'Medical records available'. The 'Medical records observed' column lists 'Jen Smith', 'Richard Hatch', and 'Emily Black', with a 'Remove all' button. The 'Medical records available' column has a search bar and lists several names with '++' next to them. A 'Save' button is highlighted with an orange box and labeled 'D' at the bottom of the modal.

In Users, select the Coordinator tab (A).

Search Coordinator within the Search Users bar (B).

Select Name of Coordinator (C).

In the Manage Members tab, Managers can complete the following actions:

- **Change Primary Coordinator for Member**
- **Remove all or individually remove supporting Coordinators assigned to monitor Member**
- **Add all or individually add available Coordinators to assign and monitor Member**

Select Save (D).

# Lock Manager, Coordinator, & Member Accounts

The screenshot shows a web interface for managing users. At the top, there are tabs for 'Users', 'Managers', and 'Statistics'. A search bar labeled 'Search Users' with a 'Go' button is on the right. Below the tabs, there's a '+ New User' button and filters for 'Coordinators' and 'Members'. A table lists users with columns for Name, Email, Phone, Observes, Last activity, Registered at, and Actions. The Actions column contains icons for information, edit, lock, and delete. A dropdown menu is shown for the Actions column, highlighting the lock icon.

Name ▲	Email ▲	Phone	Observes	Last activity ▲	Registered at ▲	Actions
Emily Fellows	efellows@life365.health	480-567-7891	3 medical records	about 5 hours ago	21.02.2018	🔍 ✎ ✓ 🗑️
Mary Morris	mmorris@life365.health	602-456-9321	1 medical record	3 months ago	13.12.2018	🔍 ✎ 🔒 🗑️
Richard Hayes	rhayes@life365.health	602-123-4567	3 medical records	about 1 year ago	17.01.2018	🔍 ✎ ✓ 🗑️
Lisa Gonzales	lgonzales@life365.health	480-876-5432	5 medical records	6 months ago	24.07.2018	🔍 ✎ ✓ 🗑️

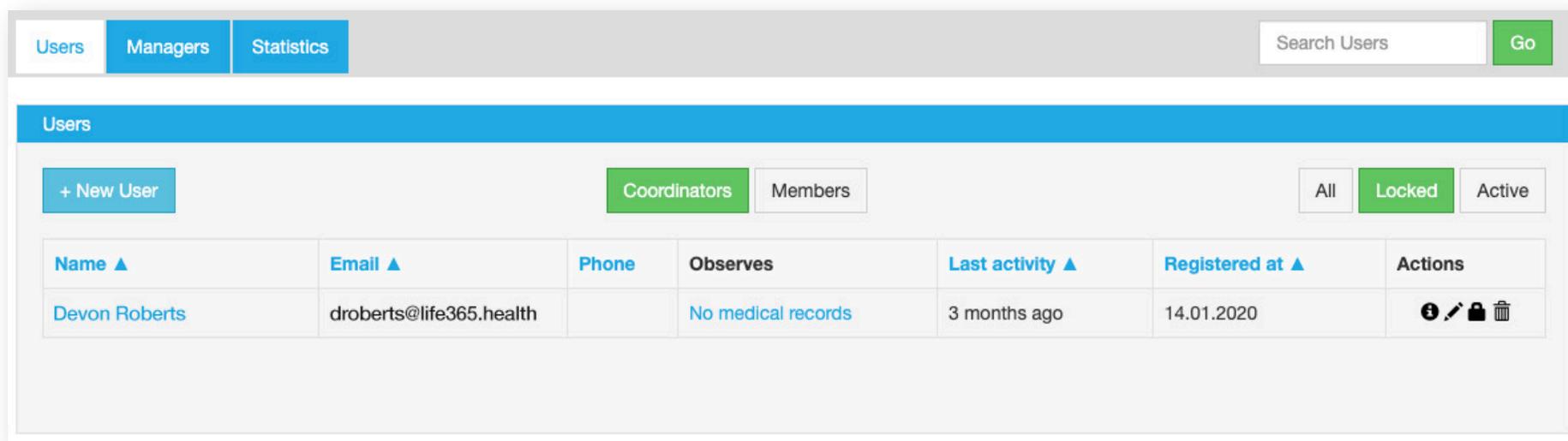
Lock accounts for those who no longer require access to Manager, Coordinator, or Member accounts.

Within the Actions column for the Managers, Coordinators, & Members tab – Select the check mark icon.

A confirmation dialog box with the following text: "I365.ent.msbx.life365inc.com says Are you sure you want to lock archive@life365.health user?" Below the text are two buttons: "Cancel" and "OK".

*A prompt will display. Select OK to confirm account locking.*

# Lock Manager, Coordinator, & Member Accounts (Cont.)



The screenshot shows a web interface for user management. At the top, there are tabs for 'Users', 'Managers', and 'Statistics'. A search bar labeled 'Search Users' with a 'Go' button is on the right. Below the tabs, there's a blue header bar labeled 'Users'. Underneath, there's a '+ New User' button and two tabs: 'Coordinators' (highlighted in green) and 'Members'. To the right, there are three filter tabs: 'All', 'Locked' (highlighted in green), and 'Active'. Below these is a table with columns: Name, Email, Phone, Observes, Last activity, Registered at, and Actions. The first row shows a user named 'Devon Roberts' with email 'droberts@life365.health', no medical records, last activity '3 months ago', and registered on '14.01.2020'. The Actions column contains icons for info, edit, lock, and delete.

Name ▲	Email ▲	Phone	Observes	Last activity ▲	Registered at ▲	Actions
Devon Roberts	droberts@life365.health		No medical records	3 months ago	14.01.2020	   

Locked accounts will display within the Locked tab.

To unlock an account, complete the following:

- **Select the Locked tab**
- **Within the Actions column, select the padlock icon**

The account has successfully unlocked.

# Lock Manager, Coordinator, & Member Accounts

The screenshot shows a web interface for managing users. At the top, there are tabs for 'Users', 'Managers', and 'Statistics'. A search bar labeled 'Search Users' with a 'Go' button is on the right. Below the tabs, there's a '+ New User' button and filters for 'Coordinators' and 'Members'. A status filter shows 'All' selected, with 'Locked' and 'Active' options. The main table has columns: Name, Email, Phone, Observes, Last activity, Registered at, and Actions. The Actions column contains icons for information, edit, lock, and delete. A tooltip is shown over the Actions column, displaying the icons for each user row.

Name ▲	Email ▲	Phone	Observes	Last activity ▲	Registered at ▲	Actions
Emily Fellows	efellows@life365.health	480-567-7891	3 medical records	about 5 hours ago	21.02.2018	🔍 ✎ ✓ 🗑️
Mary Morris	mmorris@life365.health	602-456-9321	1 medical record	3 months ago	13.12.2018	🔍 ✎ 🔒 🗑️
Richard Hayes	rhayes@life365.health	602-123-4567	3 medical records	about 1 year ago	17.01.2018	🔍 ✎ ✓ 🗑️
Lisa Gonzales	lgonzales@life365.health	480-876-5432	5 medical records	6 months ago	24.07.2018	🔍 ✎ ✓ 🗑️

Within the **Managers**, **Coordinators**, & **Members** tab - locked accounts will display the padlock icon within the **Actions** column.

For unlocked (active) accounts, the check mark icon will display within the **Actions** column.

**NOTE:** *Accounts can also be Locked when editing profile info!*