



How to: Accept Waitlist Offers

Overview

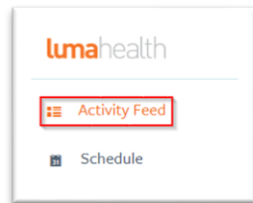
Luma Health allows for patients to be added to a waitlist in case any earlier appointments, than the one they are currently schedule for, become available. Your Luma account can be configured so that either:

1. A staff member has to confirm the appointment after a patient has accepted the waitlist offer.
2. Patients are automatically scheduled after they have accepted the waitlist offer.

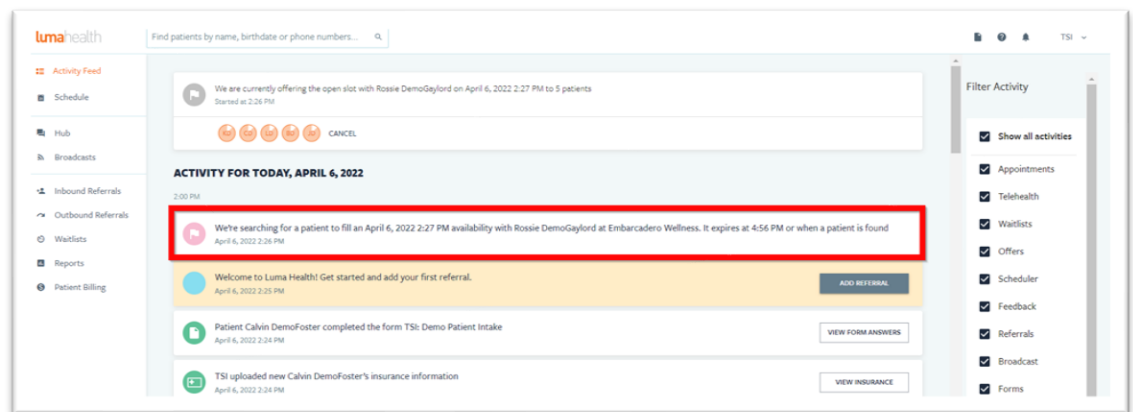
We will now take a look at how one would accept a waitlist offer within Luma Health!

How do I view waitlist offers on the Home Page//Activity Feed?

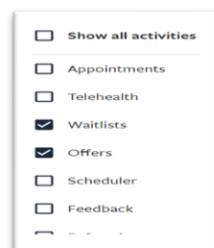
- Login to <https://next.lumahealth.io> and open the **Activity Feed**:



- Your screen should look similar to this:



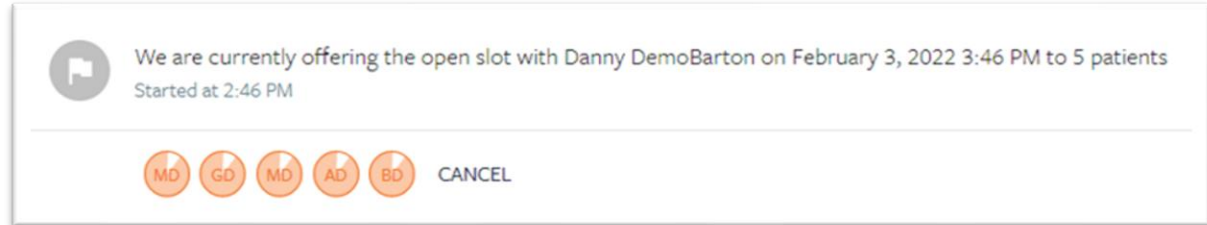
- In this example, the top entry in our activity feed shows where Luma began searching for a patient on the waitlist to fill an open appointment.
 - ◆ **NOTE:** You can set your activity feed to only show Waitlists & Offers by utilizing the filters in the right-hand column. Simply deselect "Show all activities" and then check the box next to *Waitlists*, *Offers*, or *both*.





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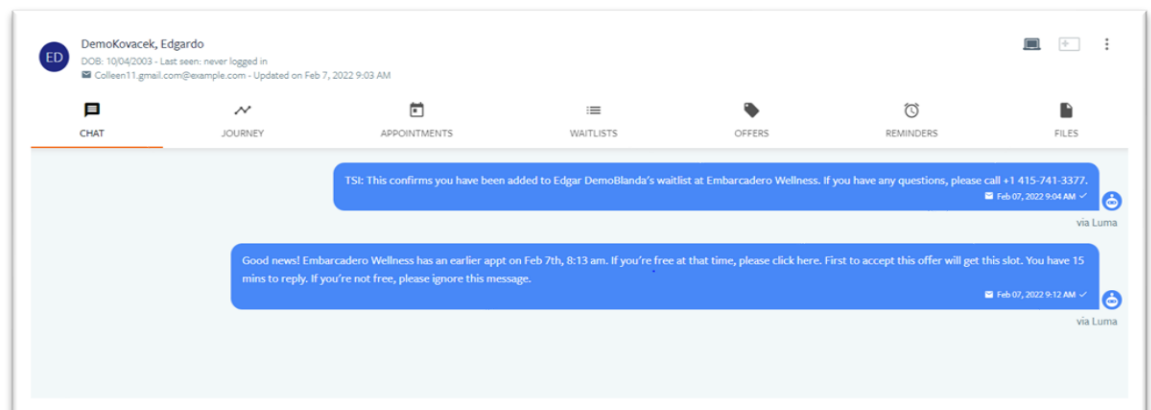
- Above our activity feed, we are able to see any appointments that are currently being offered out; as well as to **which provider** the appointment is being offered with, and **what date and time** the appointment is on.



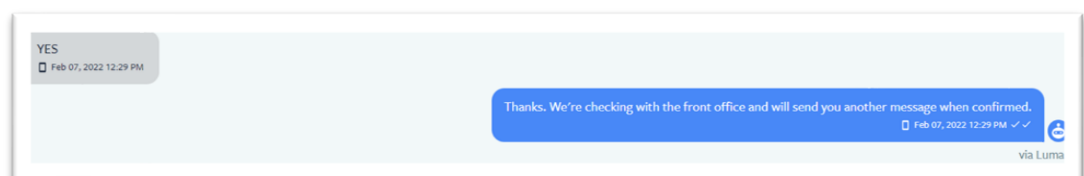
- ◆ Contained within this box you'll find an *orange circle* with initials inside. **Each orange circle represents a patient who is currently being offered the appointment.** The offer will expire for all patients at the same time after either the timer runs out, or the first person has confirmed the appointment.
- ◆ *If your account is set up to send out waitlist offers in serial, then it will instead offer out appointments to the waitlist one patient at a time.*
- ◆ This circle shows how much time is left on the offer before it is revoked.
- ◆ We are able to click that circle, which will lead us straight to the patient's profile.
- ◆ There's a cancel option, in case this appointment no longer needs to be offered out to the waitlist.

How do I view appointment information within Patient Profiles?

- When opening a patient profile, we will first see the patient's chat history:



- Here we can view any messages that have been sent to the patient (including waitlist offers), as well as any patient responses.
- Once a patient confirms the offer, they'll receive an automated message that the appointment is being verified with the front office.





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- If we click on the **Waitlist** tab in the patient's profile, we can view any waitlists that that patient is currently waiting in or has accepted in the past.

DATE ADDED	ADDED BY	PROVIDER	FACILITY	APPT TYPE	DURATION	STATUS
February 7, 2022 9:04 AM	Patient	Edgar DemoBlanda	Embarcadero Wellness	Any	Any duration	Offered

- We are able to see:
 - The date & time that the patient was added to the waitlist
 - Who added the patient to the Waitlist
 - The provider/resource that the patient is on the Waitlist for
 - The facility that the patient is on the Waitlist for
 - Waitlist status
- If we were to click on the Waitlist information from the patient's profile, a window opens that will show us all *Appointment Information* that was used when adding the patient to the waitlist.

Appointment Information

HD Hallie DemoReinger

Providers* Facility* Duration

Appointment Type Preferred Date Range -

Preferred Days Preferred Time of Day

Notes

- This window will show us any notes that have been left for this patient in regards to their placement on a waitlist. *Many practices will use this feature in order to notate that a patient is high priority and to not place any other patients higher than them on the waitlist.*



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- If any of these options are left as default (usually “any” or “no preference”), then Luma will add the patient to the waitlist for all options.
 - Example: *If appointment type is left as “Any appointment type”, then the patient will be added to the waitlist for all appointment types at your practice and whichever becomes available first is what they’ll be offered.*
- By clicking on the **Offers** tab, we are able to see the patient’s full waitlist history; including both past and current waitlist offers.

ED DemoKovacek, Edgardo
DOB: 10/04/2003 - Last seen: never logged in
colleen11@gmail.com@example.com - Updated on Feb 7, 2022 9:03 AM

CHAT JOURNEY APPOINTMENTS WAITLISTS **OFFERS** REMINDERS FILES

Pending Offers

APPT TIME	FACILITY	PROVIDER	APPT TYPE	TIME REMAINING
February 7, 2022 4:35 PM	Embarcadero Wellness	Edgar DemoBlands	Any	an hour

Previous Offers

APPT TIME	FACILITY	PROVIDER	APPT TYPE	STATUS
February 7, 2022 11:19 AM	Embarcadero Wellness	Edgar DemoBlands	Any	No Response

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- **Note:** we cannot click on any of the waitlist offers within this section. However, one particularly useful function of the offers tab is that *it will show how much time is remaining for pending waitlist offers.*

How do I view appointment information within the Waitlist section?

- Click on **Waitlists** in the *left-hand column*

lumahealth Find patients by name, birthdate or phone numbers... TSI

Activity Feed Schedule Hub Broadcasts Inbound Referrals Outbound Referrals **Waitlists** Reports Patient Billing Help

WAITLISTS View Offers > 5 waiting for Christ DemoO'Kon Send offers

Add patient to waitlist

Find provider Find patient in waitlists

Christ DemoO'Kon 5

Barton DemoClinton 4

Estell DemoSchmidt 4

Neal DemoMayer 4

Finn DemoReinger 4

Bernardo DemoZieme 4

Select items Relaxed Compact

DemoTurcotte, Antonetta July 8, 1992 Embarcadero Wellness Waiting 0 days

DemoGibson, Tevin November 26, 1965 Embarcadero Wellness Waiting 0 days

DemoMills, Jamir April 10, 1983 Embarcadero Wellness Waiting 0 days

DemoGorczyan, Madge September 13, 1951 Embarcadero Wellness Waiting 0 days

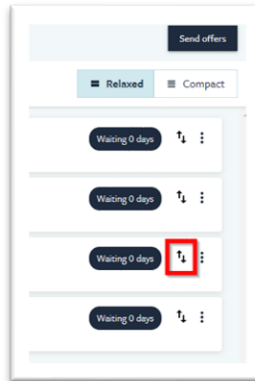
DemoAbernathy, Beau May 4, 1999 Embarcadero Wellness Waiting 0 days

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- Here we are able to see all patients currently on the waitlist for each provider.

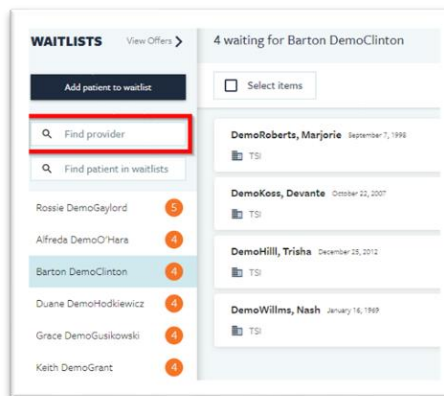


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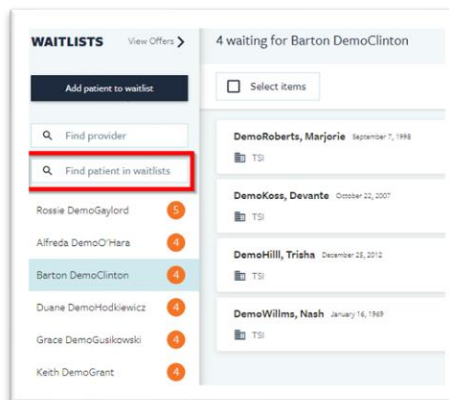
- This screen shows us a variety of information regarding the patients' appointment that they're waiting for, as well as how many days that the patients have been on the waitlist.
 - *If your account is set up to offer out appointments to the waitlist one at a time in serial, then you may want to utilize the arrows on the right-hand side in order to re-organize the waitlist order. Click and drag on the arrow and place the selected patient to the necessary order.*



- Also within the waitlist section we are able to:
 - Search for a provider



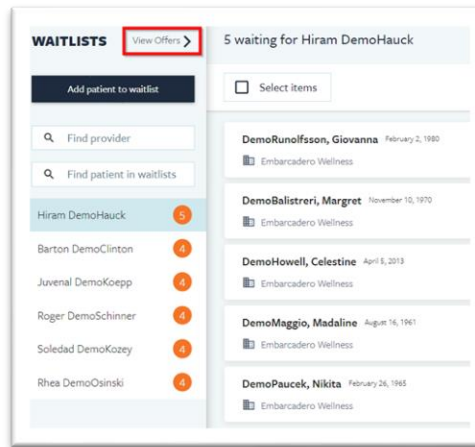
- Find specific patients within the waitlist



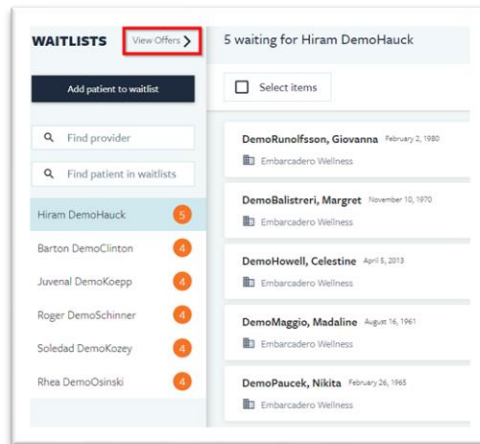


How to: Accept Waitlist Offers

- View all waitlist offers.



- If we click on **View Offers**, we can view every waitlist offer that has ever been sent out.



- We could filter these offers by a variety of options:

Offers Queue						
Any Status ▾ Any Provider ▾ Any Facility ▾						
Offer Time	Appointment Time	Provider	Facility	Creation Source	Status	EHR Status
Feb 08, 1:53 pm	Feb 08, 1:53 pm	Barton DemoClinton	TSI	Manual	Patient Found	Pending
Feb 08, 1:53 pm	Feb 08, 1:53 pm	Rhea DemoOsinski	TSI	Manual	Patient Found	Pending
Feb 08, 1:53 pm	Feb 08, 1:53 pm	Soledad DemoKozey	TSI	Manual	Patient Found	Pending
Feb 08, 1:53 pm	Feb 08, 1:53 pm	Juvenal DemoKoepp	TSI	Manual	Patient Found	Pending
Feb 08, 1:53 pm	Feb 08, 1:53 pm	Roger DemoSchinner	TSI	Manual	Patient Found	Pending
Feb 08, 1:53 pm	Feb 08, 1:53 pm	Hiram DemoHauck	TSI	Manual	Patient Found	Pending
Feb 08, 1:53 pm	Feb 08, 1:53 pm	Barton DemoClinton	TSI	Manual	Patient Found	Pending
Feb 08, 1:53 pm	Feb 08, 1:53 pm	Rhea DemoOsinski	TSI	Manual	Patient Found	Pending
Feb 08, 1:53 pm	Feb 08, 1:53 pm	Soledad DemoKozey	TSI	Manual	Patient Found	Pending
Feb 08, 1:53 pm	Feb 08, 1:53 pm	Juvenal DemoKoepp	TSI	Manual	Patient Found	Pending

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- **Status**

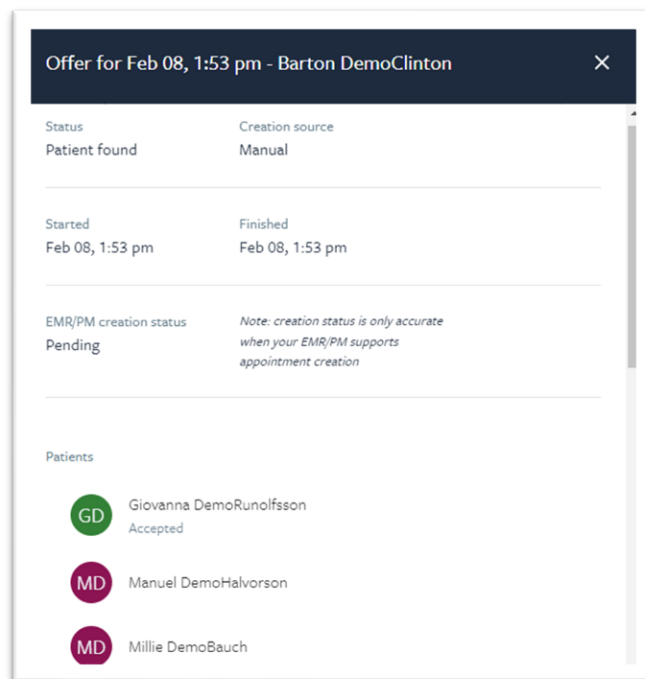


- - Pending Patient Response = still waiting on patient response
 - Patient Not Found = Luma sent out the waitlist offer and none of the patients replied to the offer
 - Patient Found = Any offers that a patient has accepted
 - Cancelled = Offers that were cancelled by a staff member after it had already been sent out.

- **Provider//Resource**

- **Facility**

- You are able to click on any individual waitlist offer in order to view its full details.



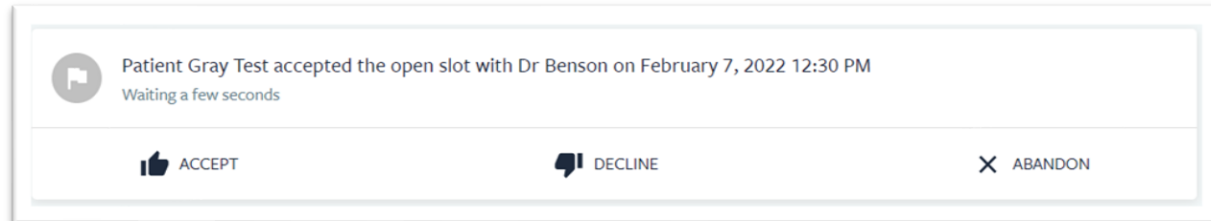
- - ***This window is extremely useful as we can determine which patients this waitlist offer was sent to, as well as who accepted the appointment.***



How to: Accept Waitlist Offers

How do I accept a Waitlist Offer?

- Once a patient has replied to confirm a waitlist offer, a staff member within your office will need to approve that patient in order for them to be added to the schedule.



- If an offer is **ACCEPTED** by your staff, then the patient will be added to the schedule for that appointment.
 - If **DECLINE** is selected, the patient will receive a message notifying them that the appointment is no longer available but are being added back to the waitlist.
 - ABANDON** has the same functionality as *Decline*, however if that option is chosen the patient will **not** receive a follow-up message.
- Your Luma account can also be configured so that a provider does not have to accept the patient.
 - After the patient confirms the waitlist offer, they will be **automatically** added to the schedule.
- After a patient has *accepted* a waitlist offer, they are automatically *removed* from the waitlist.**

If you have any questions regarding the information included in this document, please contact helpdesk@tsihealthcare.com