



How to: Add a Patient to the Waitlist

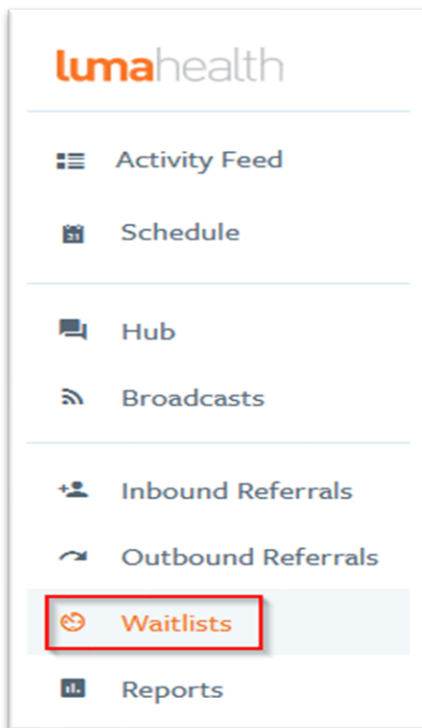
Overview

One of the many features included in your Luma Health package is the ability to add patients to the Waitlist within your Luma account. We will now take a deep dive into how the Waitlist works and how you can benefit from this feature!

How do I add a patient to the Waitlist?

- ❖ Log onto <https://next.lumahealth.io/> with your email and password
 - If you are unable to remember your password, open a ticket with helpdesk@tsihealthcare.com

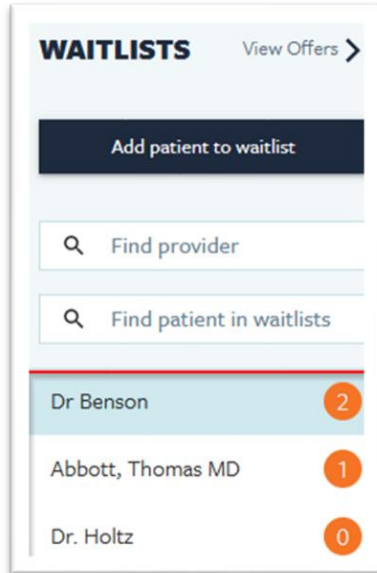
- ❖ Once you have logged into your Luma Health account, there will be a menu on the left-hand side of the screen
 - Click on **Waitlists**



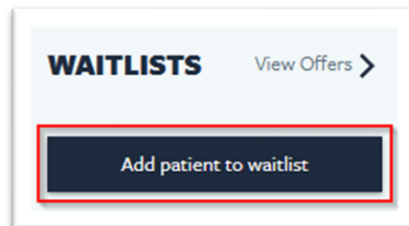


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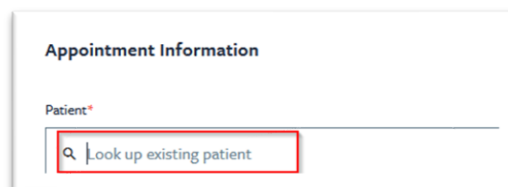
- Once you're on the Waitlists page, you will be able to see a list of all the providers in your Luma account that are enabled for the waitlist. You will also be able to see the number of patients that are waiting in line for that particular provider by the orange circle with the number inside.



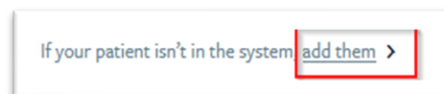
- Patients have the option to add themselves to the waitlist after they have cancelled their appointment by responding with the word “waitlist” (if you have chosen to enable that setting for your practice).
- To manually add a patient to your waitlist, select **Add patient to waitlist**



- Now you can search for a patient by typing in their name in the **look up existing patient box**. As you start to type their name, Luma will start to return results based on your entry



- If a patient is not in the Luma database, you can add them by selecting the option below the patient box that states **add them**





How to: Add a Patient to the Waitlist

- You can now add a new patient to the Luma database by entering their first and last name, date of birth, language and a contact method (text, email, phone)

New Patient Information

First Name*

Required

Last Name*

Date of Birth* Contact Language

Do not contact

Link patient to EHR

Contact*

- Once you have entered the new patient's demographics, you will have the ability to add the patient onto the waitlist by completing the appointment information on the form to the right

Appointment Information

Duration

Providers*

Facility*

Appointment Type Preferred Date Range
 -

Preferred Days Preferred Time of Day

Notes

Cancel



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- Now you want to give specific information on the type of appointment the patient needs.
 - Provider
 - This is a required field. Providers will always default to Any Provider. If you leave this defaulted and add a patient, they will be added to the waitlist for all providers. If the patient only needs an appointment for one provider, choose that provider in the drop down.

- Facility
 - This is a required field. Facility will always default to Any facility. If you leave this defaulted and add a patient, they will be added to the waitlist for all facilities. If the patient only needs an appointment for one facility, choose that facility in the drop down.

- Duration
 - You have the option to choose how much time to allow for the appointment by selecting the duration in minutes. Make sure you are putting in the correct duration so that it corresponds with the appointment type that the patient needs in NextGen. If a new patient appointment has a 30 minute duration and you add a patient for a 15 minute duration, that patient would not be eligible for that new patient appointment as the durations do not match and duration is one of the criteria Luma is looking for. If you are not sure of the duration, choose '*Any duration*' in the dropdown



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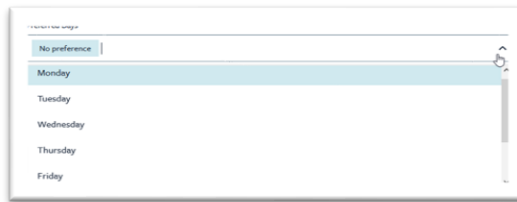
- Appointment Type
 - You have the option to choose the type of appointment that the patient needs. The appointment type will automatically default to 'Any appointment type'. Therefore, if you leave this defaulted, the patient will be eligible for any appointment type that becomes available. You will always want to be specific with the type of appointment that the patient needs

- Preferred Date Range
 - You have the option to select a date range if the patient states they are only available to be seen after a certain date. You do not have to enter an end date

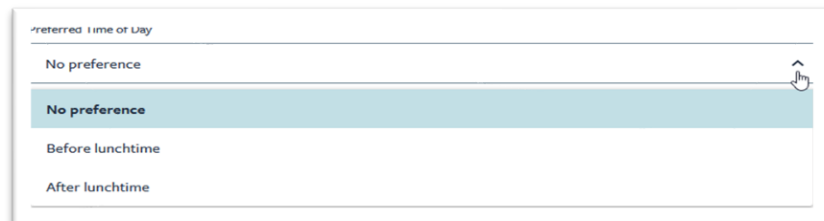


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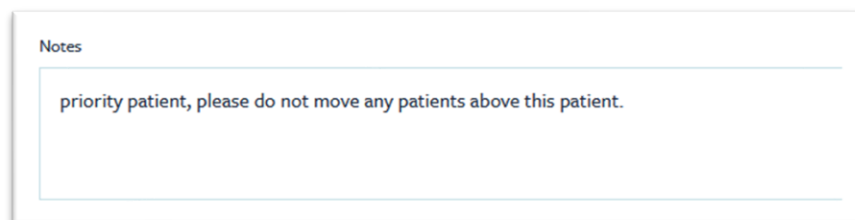
- Preferred Days
 - You have the option to choose a specific day of the week if the patient specifies they are only available during certain days. This will prevent the patient from receiving offers for days when they are not available



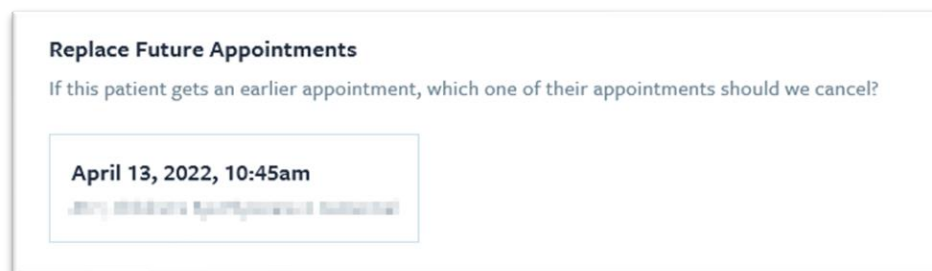
- Preferred Time of Day
 - You have the option to select a preferred time of day if the patient mentions a preference. For example: if the patient states that they are only available in the morning, you can choose before lunchtime



- Notes
 - You have the option to enter notes for other staff members to review



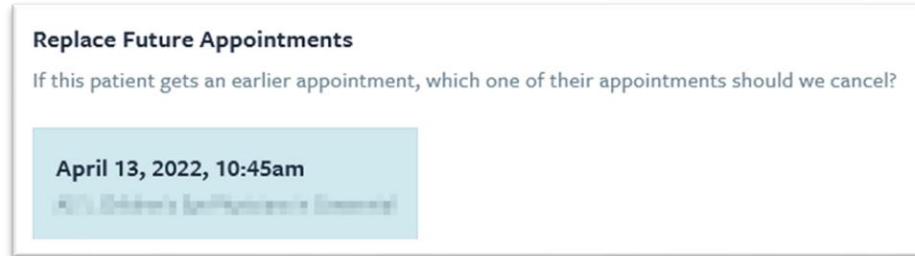
- At the bottom of the screen, you will be able to view any future appointments for that patient, if the patient has a future appointment. If the appointment that the patient receives from the waitlist needs to replace the future appointment that Luma has found for the patient, you want to make sure that you make that association by clicking on the future appointment. If you do not click on the future appointment, Luma will not replace it.



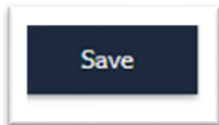


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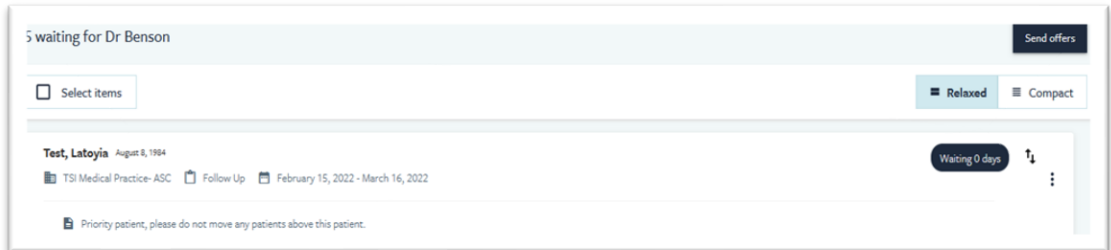
- By clicking on the future appointment it will turn blue, and this tells Luma that if the patient receives an appointment from the waitlist, Luma will schedule the waitlist appointment, then cancel this future appointment.



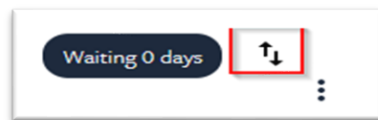
- Once you have completed all necessary fields, select **Save**



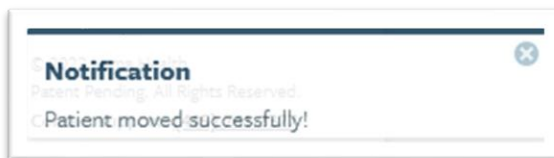
- You can now see your patient has been added to your waitlist for the provider selected. You can also see the details for the appointment and any notes that were added



- You have the ability to move patients around in the waitlist by clicking on the up and down arrows shown below and dragging and dropping the patients either up or down the waitlist



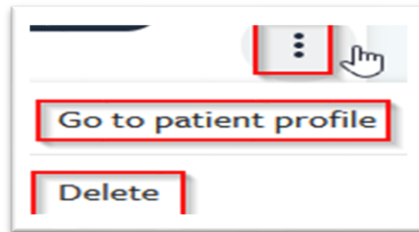
- Once you drag and drop a patient you will get a notification message that reads *Patient moved successfully!*



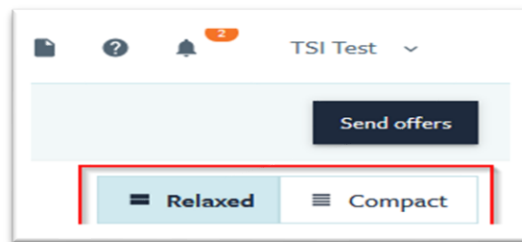


How to: Add a Patient to the Waitlist

- The 3 dots on the right hand side, allows you to delete a patient from the waitlist. You can also go to the patients profile so that you can see messages sent to the patient



- Patients will automatically be deleted from the waitlist once they receive an appointment
- You can switch between the relaxed and compact view inside the waitlist. This is a user preference. The relaxed view is easier on the eyes and in the compact view you will see more patients on your screen at a time.



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