



How to: Add Patients to the Outbound Referral Loop

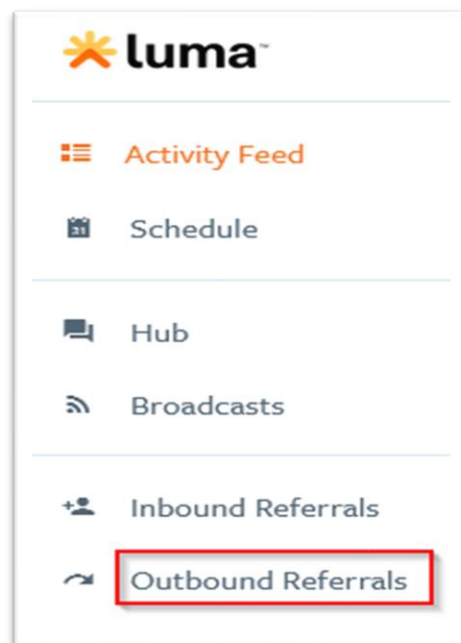
Overview

One of the many features included in your Luma Health package is the Outbound Referral Loop within your Luma Health account. The Outbound Referral Loop is used when you are referring your patients to another practice through Luma. We will now take a deep dive into how the Outbound Referral Loop works and how you can benefit from this feature!

How do I navigate to the Outbound Referrals?

- ❖ 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

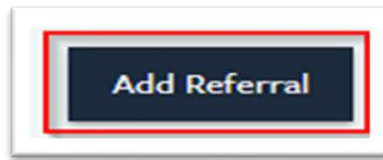
- ❖ Once you have logged into your Luma Health account, there will be a menu on the left-hand side of the screen.
 - Click on ***Outbound Referrals***. This will take you to the Outbound referral loop.





How to: Add Patients to the Outbound Referral Loop

- You can add patients to the referral loop one by one. Select **Add referral**



- In the box that states “Patient Name”, start typing the patient’s name. A list of patients will start to generate based on the characters being typed. Once you see the patient that you want, click on their name. The patient’s demographics will appear in the other boxes as well.
 - If the patient that you need to add to the referral loop is not present in Luma, you can enter their demographics manually. You would need to manually enter their last name, first name, date of birth, preferred language, address, and contact method (sms or voice)

OUTBOUND REFERRAL

Patient Name*
Test Testing - 06/08/2005

Date of Birth* 06/08/2005 Contact Language English

Street Address
US

Contact*
SMS 123-456-7890

- Once you have your patient demographics added, you will need to fill out the appointment information.
 - Facility: You must select a facility from the drop down, this allows Luma to provide the patient with the proper number to call to schedule their appointment.

Facility*
TSI Medical Practice- ASC



How to: Add Patients to the Outbound Referral Loop

- **Provider:** This option will automatically default to ANY, if you know the provider that the patient will be seeing, you can select the provider's name from the drop down.
 - If you leave it to ANY, the message will not include the provider's name when it is sent to the patient

Provider*

Any

- **Appointment Type:** This is not a required field; however, you can add this information to the referral by selecting an appointment type from the drop down

Appointment Type

Return Visit

- **ICD 9 or ICD 10:** These are not required fields. However, you can add this information to the referral by typing the information in the box and selecting the appropriate diagnosis code

ICD-9

Search

ICD-10

H35.3113 - Nexttve age-rel mclr degn, r eye, adv atrpc w/o sbfvl im

- **Rendering Provider:** If you have added rendering providers to your Luma account you can start typing characters of their name in the box and the names will begin to generate.

Rendering Provider*

Jane Doe

- If the provider has not been added to your Luma account, you have the option to add a new provider. Click on Add New Rendering Provider

Rendering Provider*

Select

+ Add New Rendering Provider



How to: Add Patients to the Outbound Referral Loop

- Start typing the provider last name, first name or their NPI number in the search box

Add New Rendering Provider

Search for provider (last name and first name, or NPI number)

- Once the provider information generates click on their name

Add New Rendering Provider

Litinsky, Steven

Litinsky, Steven
16201 Military Trl Delray Beach, FL 334846503 1689768178

- The provider fax and phone number will automatically generate, if present

Add New Rendering Provider

Litinsky, Steven 16201 Military Trl Delray Beach, FL 334846503

Can't find the provider? [Enter their information >](#)

Please enter at least one contact method*

Fax	Phone
5614988188	5614988100



How to: Add Patients to the Outbound Referral Loop

- If you search for a provider and they do not pop up during your search, you can add a provider manually but selecting “Enter their information” next to *Can't find the provider*

Add New Rendering Provider
✕

🔍 Search for provider (last name and first name, or NPI number)

Can't find the provider? [Enter their information >](#)

- Type in the new provider first and last name

Add New Rendering Provider
✕

First Name*

Last Name*

- The NPI section is optional

Add New Rendering Provider
✕

First Name*

Last Name*

🔍 [Search for provider instead >](#)

NPI Number



How to: Add Patients to the Outbound Referral Loop

- You must enter at least one contact method

Add New Rendering Provider [X]

First Name* _____ Last Name* _____

🔍 [Search for provider instead >](#)

NPI Number _____

Please enter at least one contact method*

Fax _____ Phone _____

- If you would like Luma to automatically follow up with the rendering provider via fax, and your system is enabled for this function, you would need to select the below check box. Please ensure that there is a fax number listed as a contact method



Automatically follow up with this rendering provider via fax

- If your system is not enabled for this function, you will not be able to check the box. You will also see the below message. If you would like this setting enabled, you would need to reach out to the TSI helpdesk at: helpdesk@tsihealthcare.com



Automatically follow up with this rendering provider via fax

- The “Reason for visit” and “Notes” are optional. You can type information in both boxes

Reason for visit

Notes



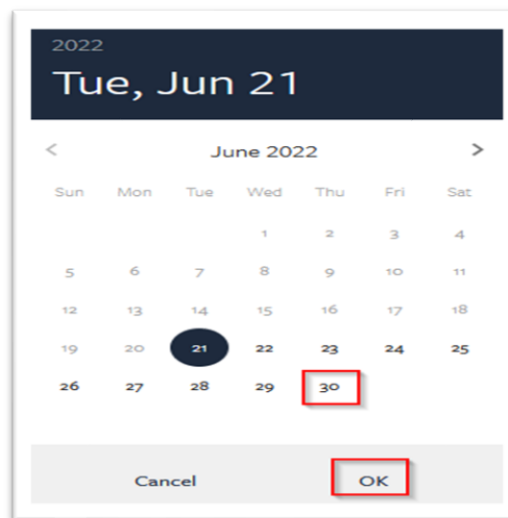
How to: Add Patients to the Outbound Referral Loop

- Referral “start on” date will automatically default to today’s date. If you would like the referral to start on a later, you can click on today’s date and a calendar will pop up.

Referral reminders start on

06/21/2022

- Select the date you want, then click OK



- Referral “end on” date will automatically populate to give Luma enough time to make sure that all of the messages are going out to your patients.
 - Please note that if you change the start on date, the end on date will not change automatically. You will need to manually change the end on date. You can click on the date and a calendar will pop up. You can then select the new end on date.

Referral reminders end on

07/21/2022

- Once you completed all fields, click *Save* at the bottom of the screen

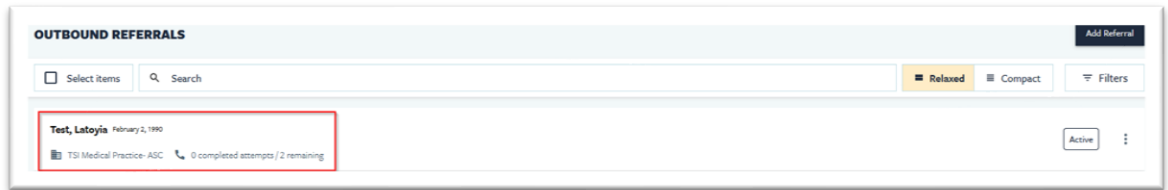
Cancel Save

Note: Once the first reminder is sent, these dates cannot be edited

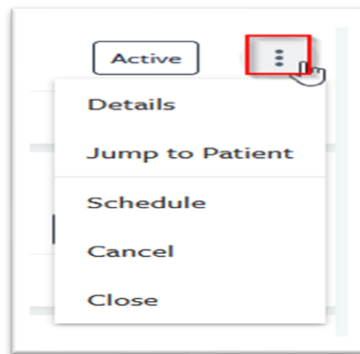


How to: Add Patients to the Outbound Referral Loop

- Your patient has now been added to the outbound referral loop



- You have the option to update the status of your patient by clicking on the 3 dots to the right



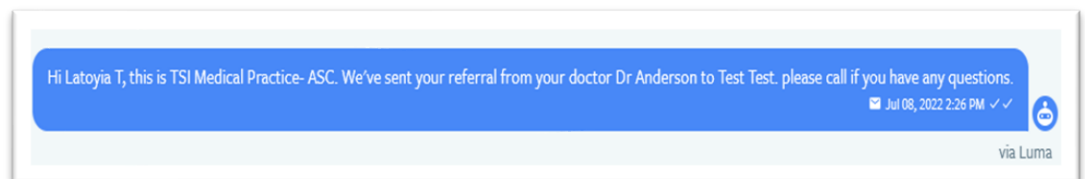
- If you select *schedule* or *cancel* it will trigger an automatic fax to the rendering provider. If you select close it will not send a fax to the rendering provider

- To see how the message will look going out to patients:

- Select “*Jump to Patient*”



- This will bring you to the patients chat hub where you will see the message that has been sent out to the patient.



If you have any questions, please contact helpdesk@tsihealthcare.com