



## How to: Enable and Disable Practice Resources for Admin Users

### Overview

One of the many features included in your Luma Health package is the ability to enable and disable practice resources within your Luma account. We will now take a deep dive into how Admin users can enable and disable practice resources and how you can benefit from this feature!

### How do I create a staff Group?

- ❖ 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](mailto:helpdesk@tsihealthcare.com)

- ❖ Once you have logged into your Luma account, there will be an arrow next to your name on the right-hand side of the screen

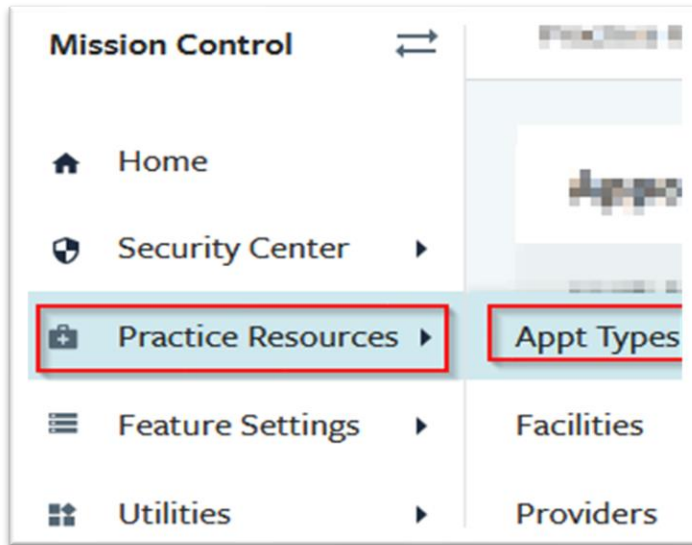
- TSI Test

- Click on that arrow and it will bring up a drop down menu. Select **Mission Control**

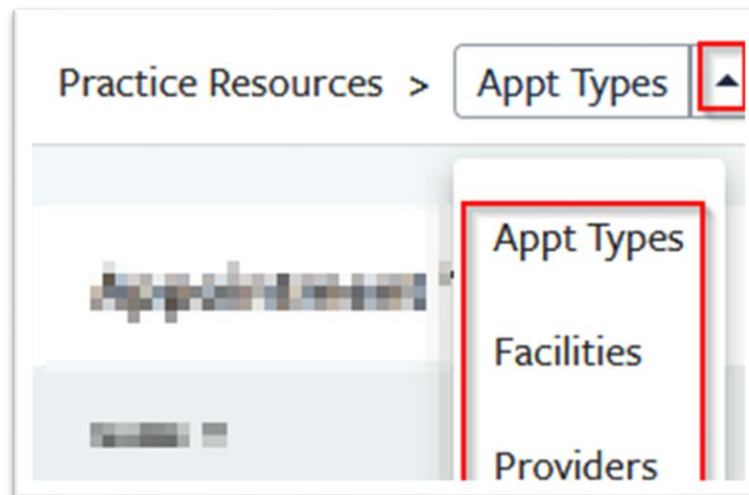


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- Hover over **Practice Resources** located on the left side panel, then select **Appt Types**



- At the top of the page next to **Practice Resources**, click the arrow next to **Appt Types**. Now you have the option to select the resource that you would like to make changes to





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- Let's start with **Appt Types**. You have the ability to enable or disable features such as custom actions, feedback, reminder, waitlist, etc., for each appointment type by simply checking or unchecking the box underneath each feature. All changes made in Practice Resources are automatically saved; there is no save button that you need to press in order to save your changes

Appointment Types						
NAME ↑	CUSTOM ACTIONS	FEEDBACK	REFERRAL	REMINDER	SCHEDULER	WAITLIST
BIPAP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Blood Draw	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CPAP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FU With Dil	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Flu Shot	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Appointment Types						
NAME ↑	CUSTOM ACTIONS	FEEDBACK	REFERRAL	REMINDER	SCHEDULER	WAITLIST
BIPAP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Blood Draw	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CPAP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FU With Dil	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flu Shot	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Follow Up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- For example: If you wanted to enable reminder messages for *Follow Up* visits so that patients can start receiving reminder messages for that particular appointment type, you can check the box underneath reminder. If your *Follow Up* appointment type no longer need to get feedback messages, you can disable that feature by unchecking the box underneath feedback and those patients will no longer receive those feedback messages for that particular appointment type

Appointment Types			
NAME ↑	CUSTOM ACTIONS	FEEDBACK	REMINDER
Follow Up	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- If you need to add a new appointment type to your Luma account, please reach out to the TSI helpdesk for assistance with adding the new appointment type.



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- Let's look at **Facilities**. You have the ability to enable or disable features such as custom actions, feedback, reminder, waitlist, etc., for each facility by simply checking or unchecking the box underneath each feature. All changes made in Practice Resources are automatically saved

Facilities						
Search All Facilities <span>Filters</span>						
NAME ↑	CUSTOM ACTIONS	FEEDBACK	REFERRAL	REMINDER	SCHEDULER	WAITLIST
Infusion Suite 101 Europa Drive , Chapel Hill, NC, 94100, US, +1 415-555-1234	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
KM Rockville , Placeholder, CA, 94100, US, +1 415-555-1234	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Main Street Location 123 Maine Street, Anywhere, NC, 33324, us, +1 800-354-4205	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New Portal Location Placeholder, CA, 94100, US, +1 415-555-1234	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Facilities						
Search All Facilities <span>Filters</span>						
NAME ↑	CUSTOM ACTIONS	FEEDBACK	REFERRAL	REMINDER	SCHEDULER	WAITLIST
Infusion Suite 101 Europa Drive , Chapel Hill, NC, 94100, US, +1 415-555-1234	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
KM Rockville , Placeholder, CA, 94100, US, +1 415-555-1234	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Main Street Location 123 Maine Street, Anywhere, NC, 33324, us, +1 800-354-4205	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
New Portal Location Placeholder, CA, 94100, US, +1 415-555-1234	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- For example: If you wanted to enable reminder messages for the *Infusion Suite* facility so that patients can start receiving reminder messages for that particular facility, you can check the box underneath reminder. If your patients for the *Infusion Suite* facility no longer need to get feedback messages, you can disable that feature by unchecking the box underneath feedback and those patients will no longer receive those feedback messages for that particular facility

Facilities						
Search All Facilities <span>Filters</span>						
NAME ↑	CUSTOM ACTIONS	FEEDBACK	REFERRAL	REMINDER	SCHEDULER	WAITLIST
Infusion Suite 101 Europa Drive , Chapel Hill, NC, 94100, US, +1 415-555-1234	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



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- If you need to change a phone number or address for a facility you can make those changes by clicking on the facility name

### Facilities

NAME ↑

**Infusion Suite**  
101 Europa Drive , Chapel Hill, NC, 94100, US, +1 415-555-1234

[KM Rockville](#)  
, Placeholder, CA, 94100, US, +1 415-555-1234

[Main Street Location](#)  
123 Main Street Anywhere NC 33324 US +1 800-354-4205

### Facility Details

Name \*  Phonetic name

**Address \***

City \*  State \*

Postcode \*  **Phone Number \***

- If you need to add a new facility to your Luma account, please reach out to the TSI helpdesk for assistance with adding the new facility.
- Let's look at **Providers**. You have the ability to enable or disable features such as custom actions, feedback, reminder, waitlist, etc., for each provider by simply checking or unchecking the box underneath each feature. All changes made in Practice Resources are automatically saved

Providers					
NAME ↑	CUSTOM ACTIONS	FEEDBACK	REFERRAL	REMINDER	
Dr Anderson	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Dr Benson	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Dr Smith	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Dr Williamson	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	



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Providers					
	NAME ↑	CUSTOM ACTIONS	FEEDBACK	REFERRAL	REMINDER
	Dr Anderson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Dr Benson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Dr Smith	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Dr Williamson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- For example: If you wanted to enable reminder messages for *Dr. Anderson* so that patients can start receiving reminder messages for that particular provider, you can check the box underneath reminder. If your patients for *Dr. Anderson* no longer need to get feedback messages, you can disable that feature by unchecking the box underneath feedback and those patients will no longer receive those feedback messages for that particular provider

Providers					
	NAME ↑	CUSTOM ACTIONS	FEEDBACK	REFERRAL	REMINDER
	Dr Anderson	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- If you need to add a new provider to your Luma account, please reach out to the TSI helpdesk for assistance with adding the new provider.

❖ **NOTE:** Before enabling an appointment type, facility, or provider for Reminders, you would need to reach out to the TSI helpdesk to speak with a Luma support specialist to ensure that there are no considerations that need to be made in your appointment reminder script before enabling a resource in your account. If you enable it before it's been properly scripted for, you run the risk of your patients not receiving the appropriate verbiage in their appointment reminder.

If you have any questions regarding the information included in this document, please contact [helpdesk@tsihealthcare.com](mailto:helpdesk@tsihealthcare.com)