



## How to: Navigate Group Management

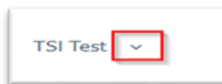
### Overview

One of the many features included in your Luma Health package is the ability to create staff groups within your Luma account. We will now take a deep dive into how to create and navigate Group Management and how you can benefit from this feature!

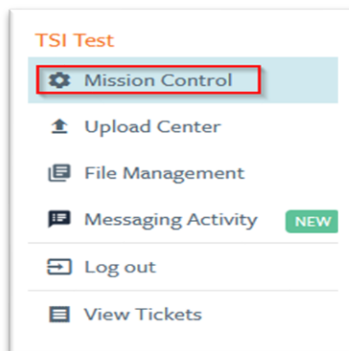
### How do I create a staff Group?

- ❖ 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



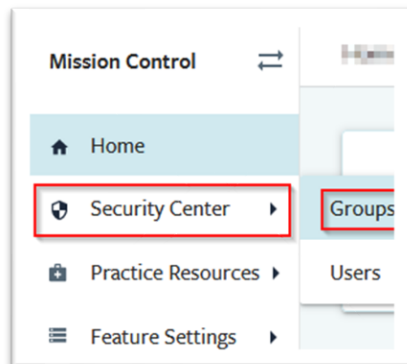
- Click on that arrow and it will bring up a drop down menu, select **Mission Control**





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- Hover over **Security Center** located on the left side panel and select **Groups**



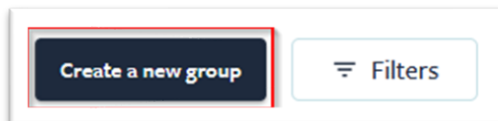
- On this screen you will be able to see a list of any groups that have already been created for your Luma account.

GROUP NAME ↑	LUMA HEALTH ID	USERS	FACILITIES
Staff	5c33d2f6c28f9102c12f75d7	9 users	0 facilities
TSI	5d7ba38d6b2f8204c572a608	8 users	9 facilities
Telehealth Activated Providers	5e820b3b5643b716e1515025	1 users	13 facilities

- If you click on the 3 dots on the right hand side of any group you have the option to edit a group or delete a group



- To add a new group to your Luma account, select **Create a new group**



- The **Title** section is mandatory. Create a name for your group by typing it inside the box underneath **Group Name**

Title

Group Name \*

Front Desk/ Check-In



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- The *Details* section is optional. You have the option to select a facility to attach this group to or leave it blank. If you select a facility, members will only be able to see information that relate to that facility. If you leave the facility blank, staff will be able to see information related to any facility.

- Select *Create group*

- On the *Groups* home page, you can see the new group has been created and since there was no facility selected, that group will have access to all facilities. You can also see how many users are assigned to each group

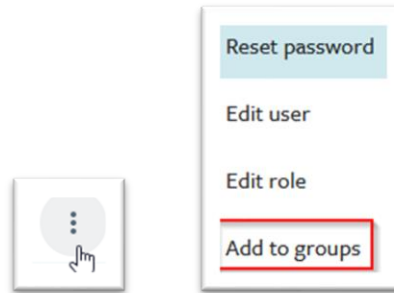
GROUP NAME ↑	LUMA HEALTH ID	USERS	FACILITIES
Front Desk / Check In	621cfe3d95081f0042d3161d	0 users	All facilities
Staff	5c33d2f6c28f9102c12f75d7	9 users	0 facilities
TSI	5d7ba38d6b2f8204c572a608	8 users	9 facilities
Telehealth Activated Providers	5e820b3b5643b716e1515025	1 users	13 facilities

- To add users to a group, at the top of the page next to *Security Center*, click the arrow next to *Groups*, then select *Users*

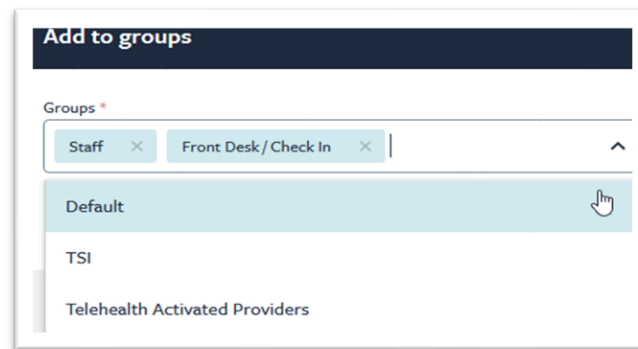


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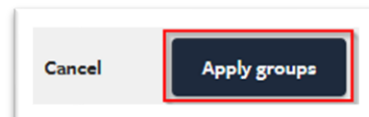
- From the *User* home page, you have the ability to add a user to a group by clicking on the *3 dots* on the right side of their name and select **Add to groups**



- An **Add to groups** box will appear, you can select the desired group/groups from the drop down menu to add a user to or remove a user from



- Select **Apply groups**



On the *User* home page, you can now see the user has been added to 2 groups

USER NAME	EMAIL	STATUS	ROLES	GROUPS	USER TYPE	LAST SIGN IN
TSI Test	productalerts@tsihea...	Active	Admin	2 groups	Staff	16 minutes ago

- Repeat these steps until you have added all the appropriate users to the appropriate groups within your Luma account

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