

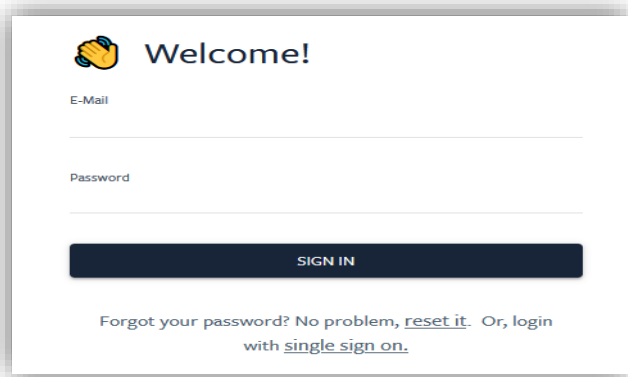


## How to Use Document Management

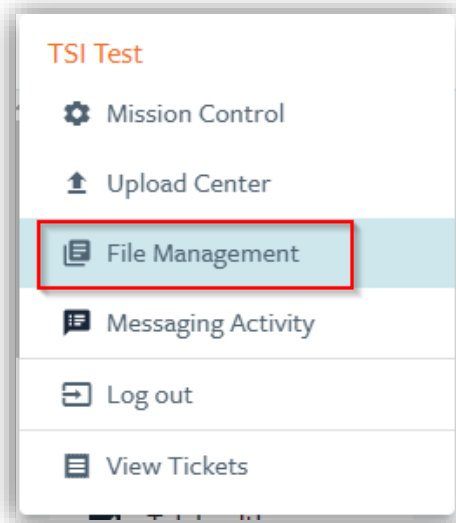
### Overview

When using the Insurance Card Capture or Intake Forms features as a part of the Luma Plus package, you have the ability to download these files from Luma and import them into NextGen using the NextGen Document Management feature.

- ❖ Open File Explorer on your computer and add a folder to your Desktop that you will utilize for your Luma Intake forms and/or Insurance Card captures (if you have not done so already)
- ❖ 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)



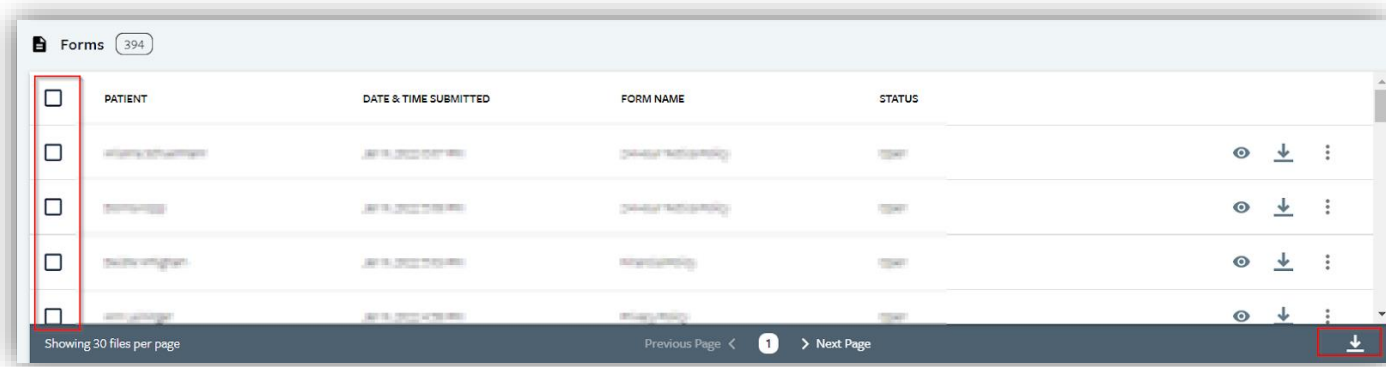
- ❖ Click on **your name** at the top right and choose **File Management**



- ❖ Choose the files you would like to bulk download and click the **download** option at the bottom right of the section.



## How to Use Document Management



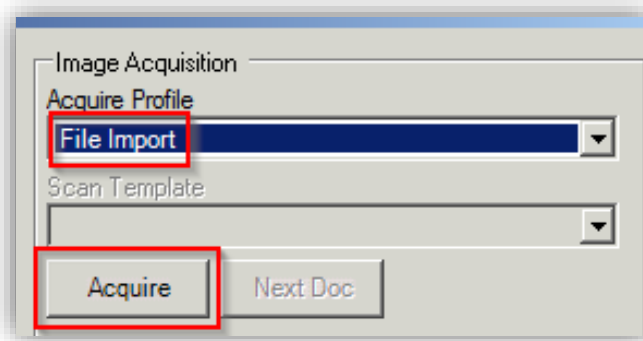
- The files will download as a *zip file* and will move to your **Downloads** folder on your computer.
- Navigate to your **Downloads** folder in your computer's File Explorer. You will need to extract the files by right clicking on your *zip file* and choosing **Extract all**.
  - You can select all of the extracted files and move them to your desired folder.
- Login to NextGen's *Document Management*



- Choose the *Scan & File* icon



- On the next window, navigate to the *Acquire Profile* section and choose **File Import** if not already selected.



- Click **Acquire** and your computer's *File Explorer* will open
- Click on **Computer** from the menu on the left side of your screen

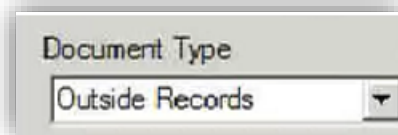


## How to Use Document Management

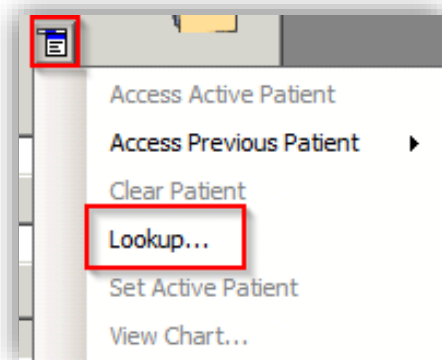
- Choose the following network location
      - C\$ (\\Client)\V:)
  - Choose **Users** and then select your **name**
  - Once you are in your folder, navigate to the location of your saved files, i.e., **Documents** or **Desktop**
  - Select the *file* you would like to upload and choose **Open**
    - If you do not see an additional file window appear, click on this **icon** from the file preview menu



- Select the **Document Type** from the dropdown in the file window
  - You can use one of the document types listed (ex: *Outside Records*), or you can create a new document type
    - Someone with *File Maintenance* knowledge and access can assist



- Select the **Norton** icon and **Lookup** to search for the patient you wish to attach the form



- Select the *Patient*. This will populate the patient's information for you
  - You must choose a *Date of Service*
    - If the file does not apply to a specific *Date of Service*, you can choose the current date



## How to Use Document Management

- Click **File**

- You will see a *pop-up* window asking if you would like to *post it*. Select **Yes** and the file will be added to the patient's chart in EHR

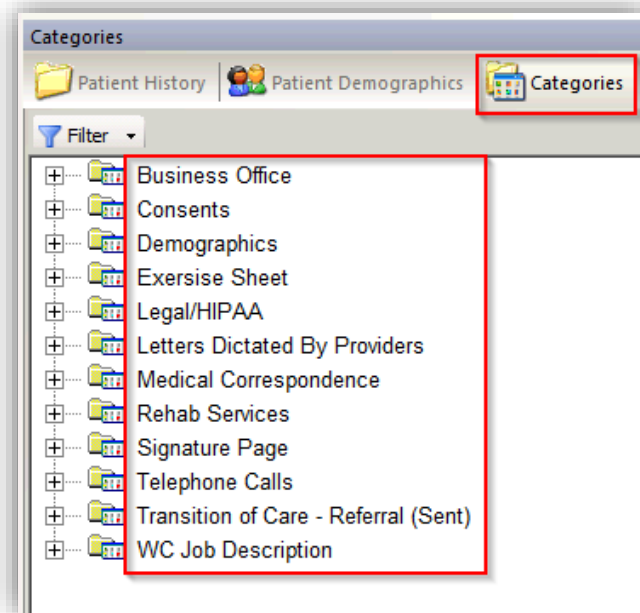
- Login to **EHR** and search for the patient using the **Patient Lookup** icon





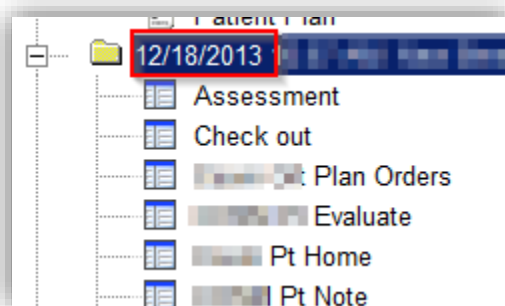
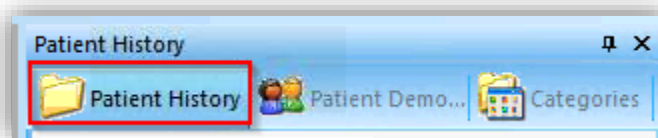
## How to Use Document Management

- On the right side of the patient screen, you will see a *Categories* tab.
  - The uploaded file will be listed in the Document Type Category listed here.
    - Example: uploaded files saved to the *Business Office* document type, will be saved under the *Business Office* category.



You can also attach the file to a specific encounter via the following steps:

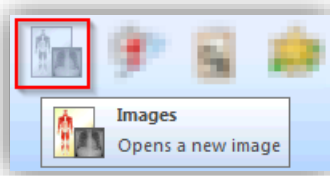
- Click on *Patient History* tab and select the encounter associated with the specific date of service to be attached



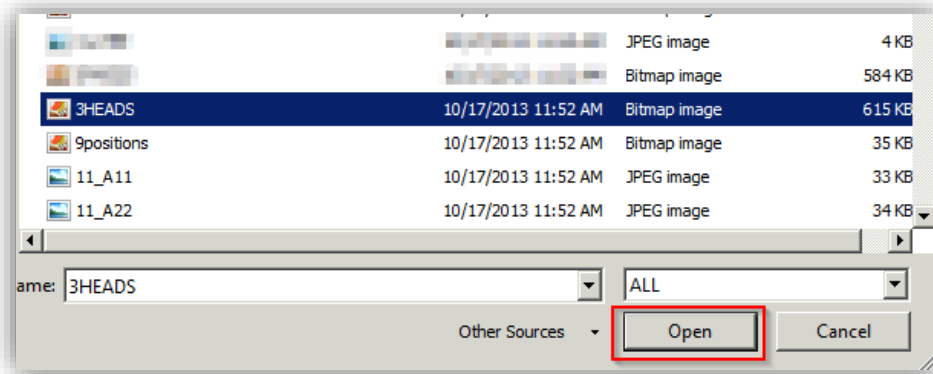
- Choose the **Images** icon



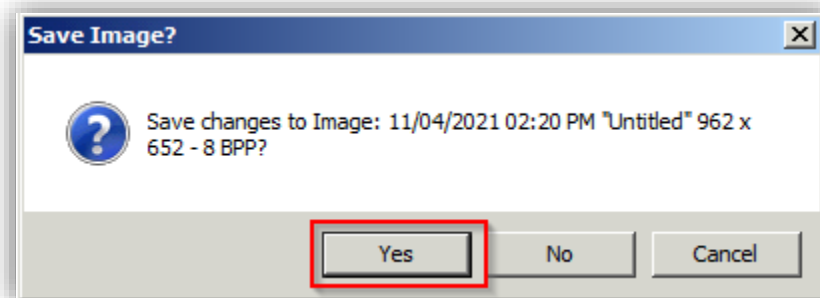
## How to Use Document Management



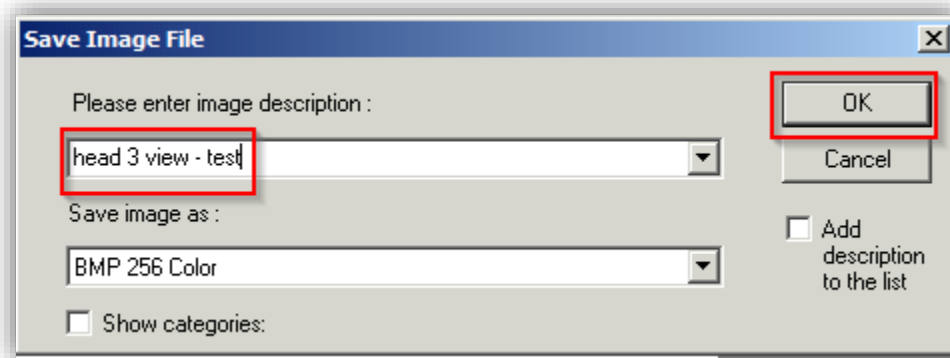
- Search for file that is saved to your **Luma Forms** folder
- Select the file and click **Open**



- Close the Image tab by clicking the "X", you will then be asked if you want to save the image
  - Click **Yes**



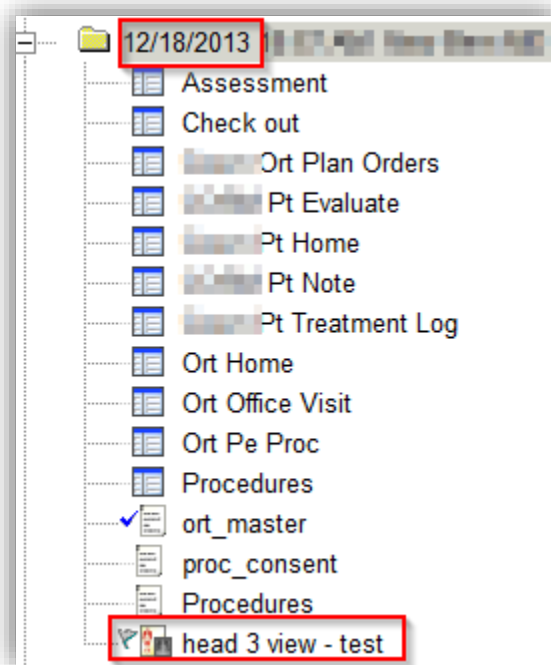
- Name the image and click **OK**





## How to Use Document Management

- Once saved, the image will be attached to the encounter and listed with the items under that specific date of service.



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