



## How to: Use File Upload Broadcast

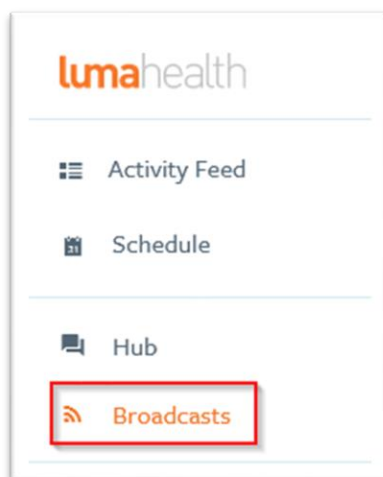
### Overview

- ❖ One of the many features included in your Luma Health package is the ability to send mass broadcast messages out to your patients. These are messages that you are sending out to patients that are on your schedule or does not necessarily have an upcoming appointment scheduled with your practice, however, you still need to reach out to those patients. We will now take a deep dive into how to send a Luma file upload broadcast and how you can benefit from this feature!

### How do I send a Luma File Upload Broadcast?

- ❖ 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)

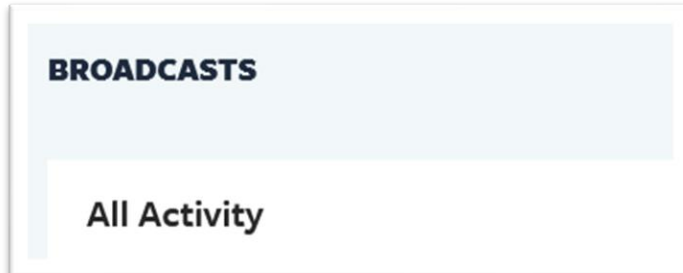
- ❖ Once you have logged into your Luma Health account, there will be a menu on the left-hand side of the screen
  - Click on *Broadcasts*



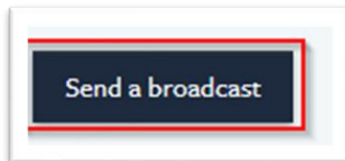


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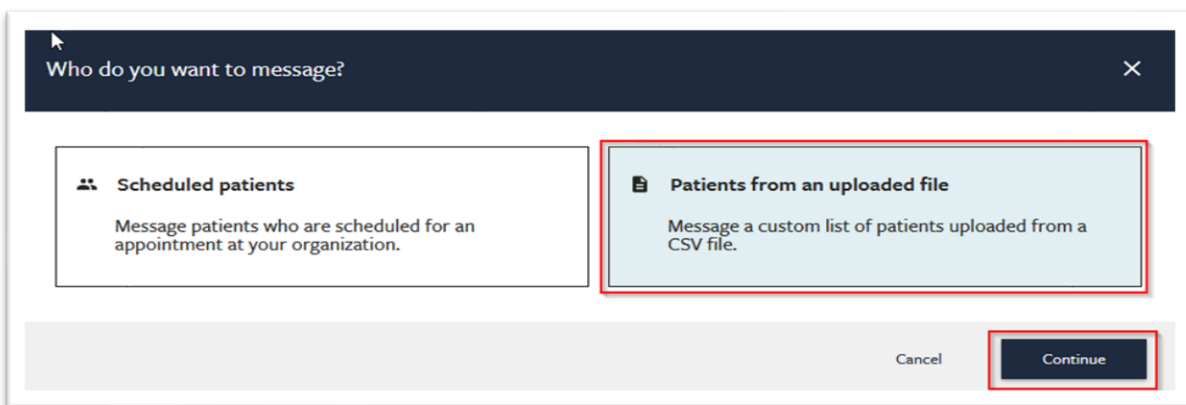
- ❖ Once you click on *Broadcasts*, it will bring you to the Broadcast feature



- ❖ Click on the *Send a broadcast* button in the upper right hand corner of the broadcast screen



- ❖ You will then see a box that gives you two options. Select the box that states *Patients from an uploaded file*, then select the *Continue* button





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- ❖ Once you get to the next screen, you have an option to drag a .csv file or select upload patient list

- If you click on upload patient list, then click on next, this will allow you to upload a file from your computer
  - Below you will find an example file. The following columns must be included in the file in order for the file to process:
    - *Patients first & last name*
    - *Patients date of birth*
    - *One contact method (cell phone, email, home phone, or work phone)*

	A	B	C	D	E	F	G
1	Last Name	First Name	Birthdate	Cell Phone	Email	Home Phone	Work Phone
2	Test	Latoyia	01/01/2000	(123) 456-7890	latoyiatest@gmail.com	(123) 789-0456	(123) 378-9101
3	Tester	Laci	02/02/1990	(234) 567-8910	testerlaci@gmail.com	(234) 891-5670	(234) 654-0987
4	Demo	Melissa	03/03/1980	(345) 678-9101	meldemo@email.com	(345) 101-9876	

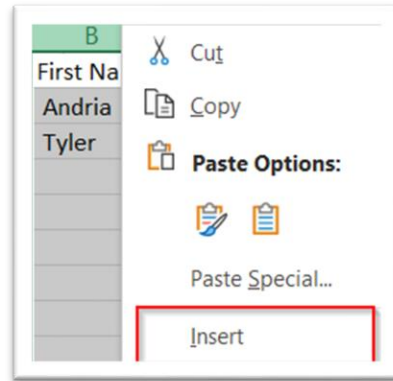
- Whenever you download a file directly from NextGen, it does not separate the patients first and last name. Usually, you will see one column in Excel that looks like this:
  - *Last name, First name*

Patient Name
Fest, Latoyia
Tester, Laci
Demo, Melissa

- However, Luma would need the first name and last names to appear in separate columns to properly generate the file
  - Select the second column (column B) in your sheet
  - Right click on the second column and choose *Insert*



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- You will need to choose *Insert* 3 times so that 3 blank columns are added to your sheet
- You should now have 3 blank columns to the right of the patient name column

A	B	C	D
Patient Name			
Test			
Test			

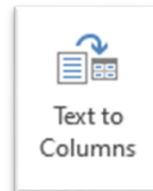
- Highlight the column that has the full name listed (in this example: Patient Name)

Patient Name
Test, Latoyia
Tester, Laci
Demo, Melissa

- Select *Data* from the top menu



- Select *Text to Columns*



- Select *Delimited*



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Original data type  
Choose the file type that best describes your data:

Delimited - Characters such as commas or  
 Fixed width - Fields are aligned in columns

- Select *Next*

Next >

- Select *Comma* and *Space* because you want to separate the information in the column based on the comma

Delimiters

Tab  
 Semicolon  
 Comma  
 Space  
 Other:

- Select *Next*

Next >

- Select *Finish*

Finish

- You have now successfully separated the patient's first name from their last name

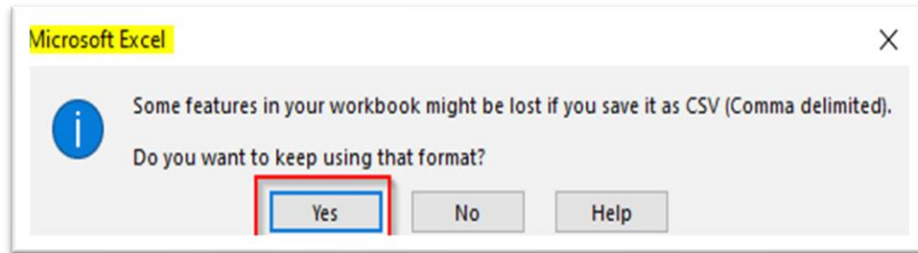
Last name	First name
Test	Latoyia
Tester	Laci
Demo	Melissa

- Columns C & D will have the patient's middle initial and nick name. These columns are not needed, unless it is actually a part of the patient's name in Luma. These columns can be deleted.
- Next you want to save this document as a CSV file because Luma will not recognize an Excel file



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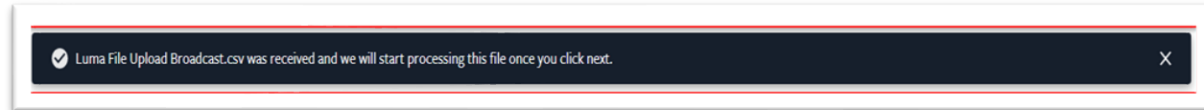
- You will see a Microsoft Excel box pop up, select Yes



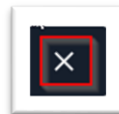
- Now go back to Luma to upload patient list. Select *Upload patients list*



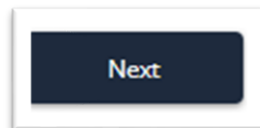
- Browse your computer for the CSV file to upload. The file name will appear at the bottom of the box



- If you selected the incorrect file, click on the X and upload the correct file following the step above



- If it is the correct file, select *Next*





## How to: Use File Upload Broadcast

- On the next screen is where you will now be directed to a screen where you will need to map the headers in your files to headers that are recognizable by Luma

Map the columns from your file to the appropriate attribute to ensure Luma Health can successfully import the information.

HEADERS FROM YOUR FILE	LUMA HEALTH ATTRIBUTES
Last Name	patientLastname
First Name	patientFirstname
Birthdate	Select attribute
Cell Phone	Select attribute
Email	patientEmail
Home Phone	patientHomePhone
Work Phone	patientWorkPhone
Physician	Select attribute

- In this example, Luma did not recognize the header labeled Birthdate, Cell Phone and Physician from the file. You can see there are no green check marks next to those headers. Therefore, you would need to select an attribute from the Luma drop down list

Birthdate	Select attribute
Cell Phone	Select attribute

Physician	Select attribute
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**Required Attributes\***

All of these must be used

- ✓ patientFirstname
- ✓ patientLastname
- patientDateOfBirth

At least one of these must be used

- patientMobilePhone
- ✓ patientWorkPhone
- ✓ patientHomePhone
- ✓ patientEmail



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providerName

- Now you can see the green check marks next to all the required attributes

Map the columns from your file to the appropriate attribute to ensure Luma Health can successfully import the information.

HEADERS FROM YOUR FILE	LUMA HEALTH ATTRIBUTES
Last Name	patientLastname
First Name	patientFirstname
Birthdate	patientDateOfBirth
Cell Phone	patientMobilePhone
Email	patientEmail
Home Phone	patientHomePhone
Work Phone	patientWorkPhone
Physician	providerName

A vertical column of green checkmarks is visible on the right side of the table, indicating that all attributes are successfully mapped.

- If you have any additional information columns that you need included in your message and Luma does not have a preloaded field to associate with like the two examples below (COVID Test & Insurance), you will need to attach those headers to the *Custom* field attribute by scrolling down to the last selection on the drop down menu

COVID Test	Select attribute
Insurance	Select attribute

Search

- appointmentTypeName
- facilityAddress
- ✓ facilityName
- facilityPhone
- patientAddress
- patientCity
- patientCountry
- patientId
- patientLanguage
- patientPostcode
- patientState
- ✓ providerName
- custom

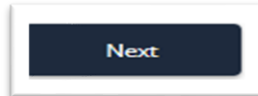




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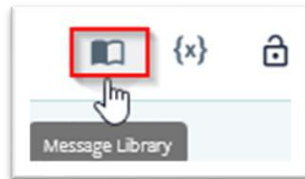
- Once you have attached the Custom field you will see green check marks appear, letting you know that you're ready for the next step

- Select *Next*

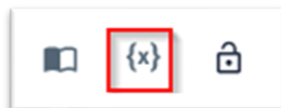


- You will need to type in a title for your Broadcast. Your Broadcast title will only be seen by your staff. Make sure that your title is as specific as possible.

- If the staff member is a sub account user, they will only be able to select a preloaded messages from the library by clicking on the message library icon, then selecting the message that corresponds with the type of Broadcast that you want to send out



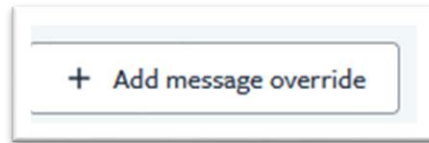
- If the staff member is an administrator or manager, they will be able to create a new message by typing it in the message box. You have the ability to use squigglyies in this message that will pull the information from your uploaded document by clicking on the this icon



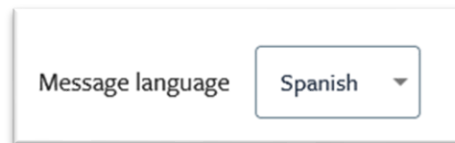


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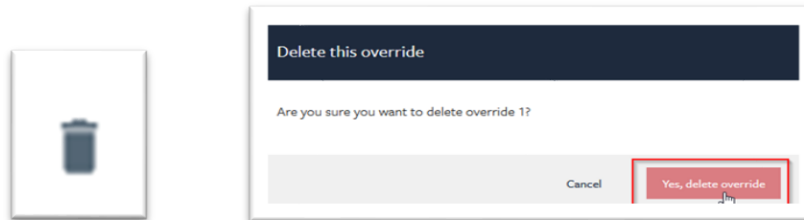
- You also have the ability to use your *Message Override* which located underneath your message box



- For example if you need to translate your message to Spanish, you can click on the drop down menu for *Message Language* and select Spanish



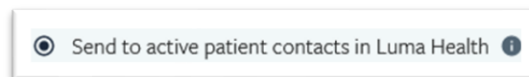
- If you realize that you don't need that message override you can delete that action by clicking on the *trash icon* in the override box, then select *Yes, delete override*



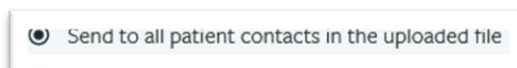
- At the bottom you will see Patient Contact Preferences

### Patient Contact Preferences

- The first option will send the message to the active contacts on file for the patients in Luma



- The second option will always be the default option. This option will send the message to **ALL** the contacts in your uploaded file. So if a patient have a cell phone, home phone and email listed it will send the message to all three contacts.



- The third option will send the message to only one contact that you have listed in the file upload in this order:
  - Cell Phone (Text)
  - Email Address (Email)
  - Home phone (Voice)



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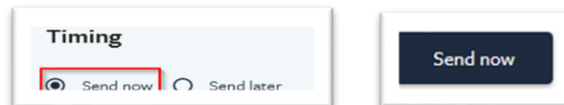
The first option would be to send a text message to a cell phone, then if no cell phone is listed it will send an email to the email address listed, then if no cell phone is listed or no email address is listed, then it will go to the home phone to give the message verbally to the patient or leave a voicemail message if the patient does not answer the call.

Send to primary patient contact in the uploaded file ⓘ

- The last section is timing. This is where you will determine when you want to send out your message.

### Timing

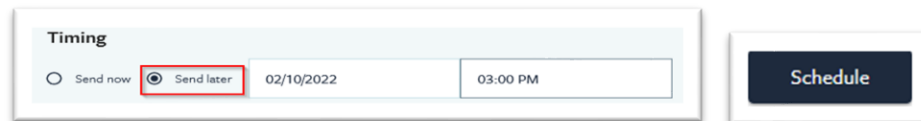
- *Send now* option will send the message out as soon as you select the *Send now* button at the bottom of the message



- **Note:** If you are setting up the broadcast message during quiet hours (timeframe that Luma cannot send automated communication) and leave this option on *Send now*, it will send to your patients as this message is no longer an automated communication. For example: If you are creating a broadcast

message around 10pm and choose for Luma to send it now, it will contact your patients around 10pm.

- *Send later* option allows you to schedule to send the message on a later date or at a later time. After you choose your date and time, you would need to select the *Schedule* button at the bottom of your Broadcast screen.



- **Note:** If a sub account user creates a message to *Send Now*, it will not go out immediately. It would need to be approved by an Admin user.

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