



How to: Use the Referral File Upload

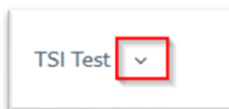
Overview

One of the many features included in your Luma Health package is the ability to send upload Referral information within your Luma account. We will now take a deep dive into how the Referral File Upload works and how you can benefit from this feature!

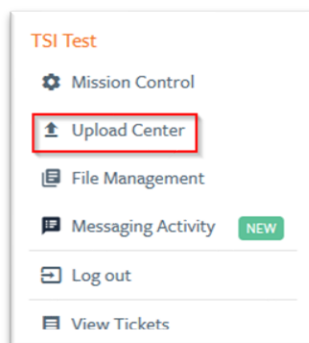
How do I send a Luma Referral File Upload?

- ❖ 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

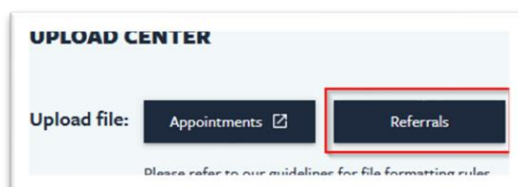
- ❖ There are two ways to upload a referral file.
 - **First Option:** Once you have logged into your Luma Health account, there will be an arrow next to your name on the right-hand side of the screen



- Click on that arrow and it will bring up a drop down menu, click on **Upload Center**



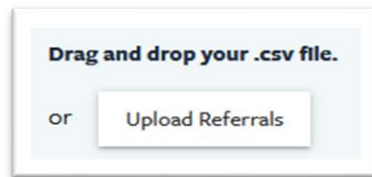
- Once you are in your Upload Center, click on **Referrals**



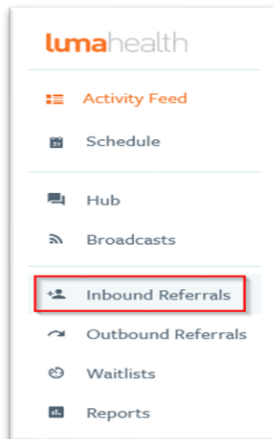


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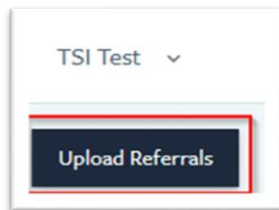
- Now you can either drag or upload your CSV file



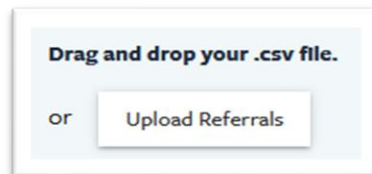
- **Second option:** Once you have logged into your Luma Health account, from the main menu on the left-hand side, click on *Inbound Referrals*



- Once you are on the inbound referrals page, click on *Upload referrals* located on the top right-hand side of the screen underneath your name



- Now you can either drag your CSV file or upload a referral file



- 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
 - ✓ Patients address
 - ✓ One contact method (cell phone, email, home phone, or work phone)



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- ✓ Facility name
- ✓ Referring provider

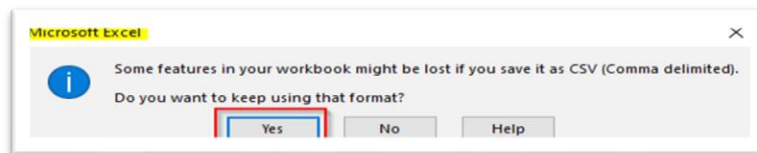
A	B	C	D	E	F	G	H	I	J	K	L	M
st Name	First Name	Birthdate	Address	City	State	Postal Code	Country	Cell Phone	Email	Home Phone	Facility Name	Referring Provid
st	Latoyia	01/01/2000	456 Apple St	Palm Beach	FL	33480	USA	(123) 456-7890	latoyiatest@gmail.com	(123) 789-0456	TSI Healthcare Center	Dr. Jan Doe
ster	Laci	02/02/1990	789 Kiwi Ave	Orlando	FL	32789	USA	(234) 567-8910	testerlaci@gmail.com	(234) 891-5670	TSI Healthcare Center	Dr. Joe Doe
emo	Melissa	03/03/1980	123 Pear Ln	Miami	FL	33101	USA	(345) 678-9101	meldemo@gmail.com	(345) 101-9876	TSI Healthcare Center	Dr. John Doe

- Next you want to save this document as a CSV file because Luma will not recognize an Excel file

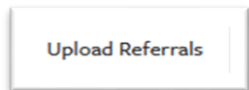
File name:

Save as type:

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



- Once you have completed and saved your Excel file, you will want to return to the Referral File Upload screen within your Luma Health account so that you could upload your patient list. Select *Upload Referrals*, this will allow you to upload a file from your computer

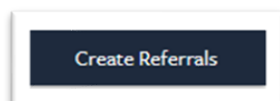


- Browse your computer for the CSV file to upload. Once the file is completely processed, it will show you a preview of the information that Luma pulled from your file upload

Loaded 3 referrals. Here are the first 3 results

PATIENT NAME	PATIENT DOB	FACILITY NAME	REFERRING PROVIDER
Latoyia Test	01/01/2000	Tsi Healthcare Center	Dr. Jan Doe
Laci Tester	02/02/1990	Tsi Healthcare Center	Dr. Joe Doe
Melissa Demo	03/03/1980	Tsi Healthcare Center	Dr. John Doe

- Select **Create referrals**



- Select **Yes, create the referrals**. This will add the patients to the referral loop portal



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Yes, create the referrals

- Now you can see the patients at the top of the *Inbound Referrals* page

INBOUND REFERRALS			Add Referral	Upload Referrals	
<input type="checkbox"/> Select items	Search		Relaxed	Compact	Filters
Demo, Melissa March 3, 1990	Tsi Healthcare Center	0 completed attempts / 5 remaining	Active		
Tester, Luci February 2, 1990	Tsi Healthcare Center	0 completed attempts / 5 remaining	Active		
Test, Latoyia January 1, 2000	Tsi Healthcare Center	0 completed attempts / 5 remaining	Active		

- ✓ You can see how many outreach attempts were made and how many remain for each patient from this page as well

Test, Latoyia January 1, 2000	Tsi Healthcare Center	0 completed attempts / 5 remaining
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If you have any questions regarding the information included in this document, please contact helpdesk@tsihealthcare.com