



How to: Use the Collaboration Hub

Overview

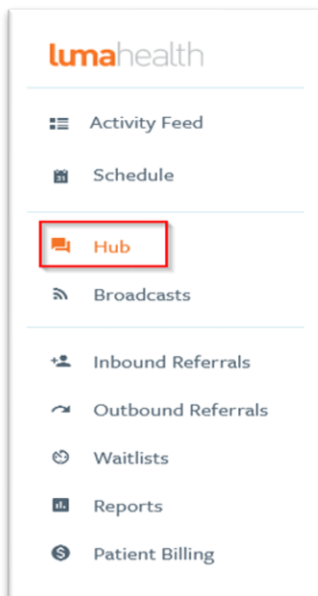
One of the most important features included in your Luma Health package is the Collaboration Hub within your Luma Health account. The Collaboration Hub is where the secure chats and conversations are housed. We will now take a deep dive into how the Collaboration Hub works and how you can benefit from this feature!

How do I navigate to the Collaboration Hub?

- ❖ 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

A screenshot of the Luma Health login page. At the top left is a yellow hand icon. To its right is the text 'Welcome!'. Below this are two input fields: 'E-Mail' and 'Password'. A dark blue button with the text 'SIGN IN' is centered below the fields. At the bottom, there is a link: 'Forgot your password? No problem, [reset it](#). Or, login with [single sign on](#).'

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

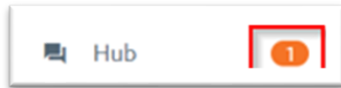




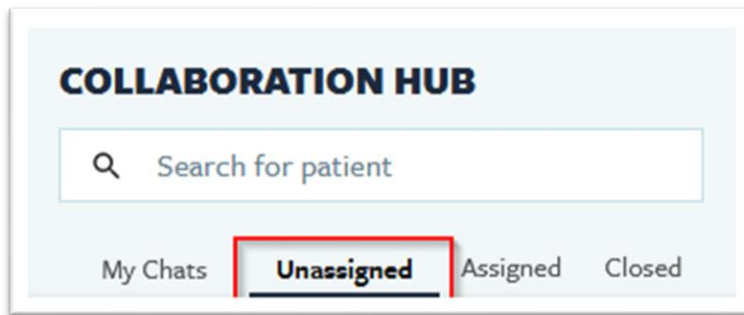
How to: Use the Collaboration Hub

What can I view in the Hub screen?

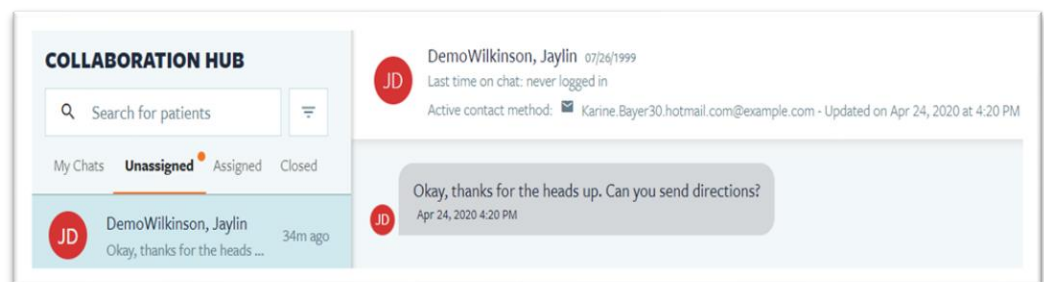
- ❖ When viewing the Collaboration Hub, if you see an orange oval with a number inside next to Hub, this indicates the number of unread messages within the Collaboration Hub that need to be attended to by your staff.



- ❖ Once you click on *Hub*, it will bring you to the Collaboration Hub menu screen. Here you have four tabs to view in the Hub: *My Chats*, *Unassigned*, *Assigned*, and *Closed*.
 - **Unassigned**- This is the most important tab. Staff is encouraged to check this tab on a daily basis.



- All unexpected replies will be routed to the unassigned tab within the Collaboration Hub.
 - An unexpected reply is considered any response that a patient sends back to you in automated message that is at least 15 characters.
 - Whenever a patient is receiving their appointment reminders, feedback messages, or waitlist offers, if they respond back with a message that Luma does not recognize, that is at least 15 characters in length, then those messages will be routed to the unassigned queue.
- Once those patient messages are in the unassigned tab, you'll be able to go through each patient message and assign them to the appropriate staff member.
 - For example: The patient below, Jaylin DemoWilkinson, asked if you can send directions. This is something that is actually questionable, therefore this message should be assigned to a staff member to review.



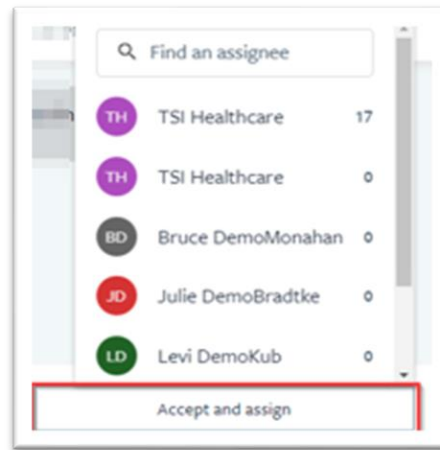


How to: Use the Collaboration Hub

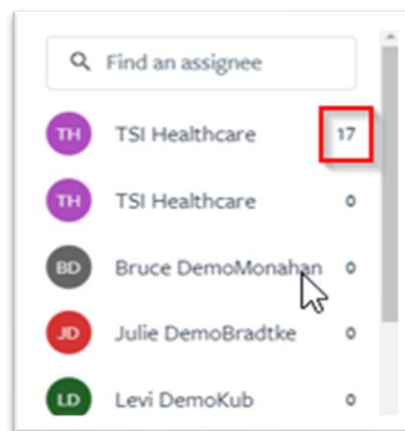
- You will need to click on the *Accept and assign* button so that a staff member could review this message.



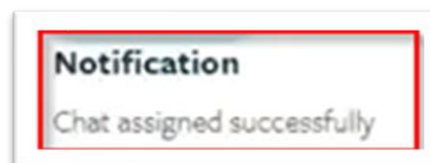
- Once you click on *Accept and assign* button, a list of staff members that have a Luma Health account will appear for you to select. You can click on their name from the list or if you have a long list of employees, you can type their name in the *Find an assignee* box to locate their name faster. This will assign the message to that staff member 'My Chats' box.



- Next to each staff members name on the right-hand side, there will be a number. This indicates the number of messages that staff member has in their 'My Chats' box



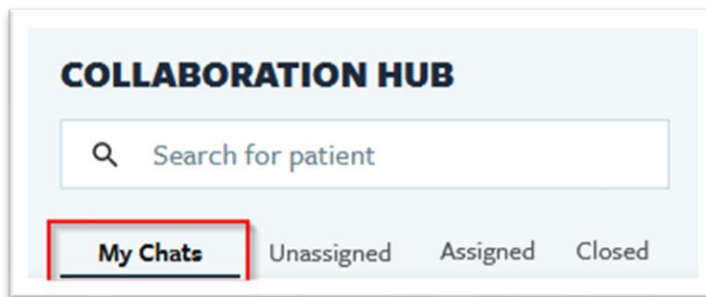
- A notification will appear at the bottom left of your screen letting you know the message was successfully accepted



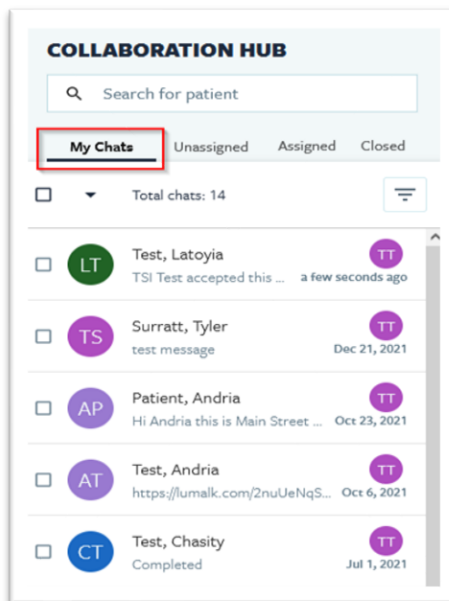


How to: Use the Collaboration Hub

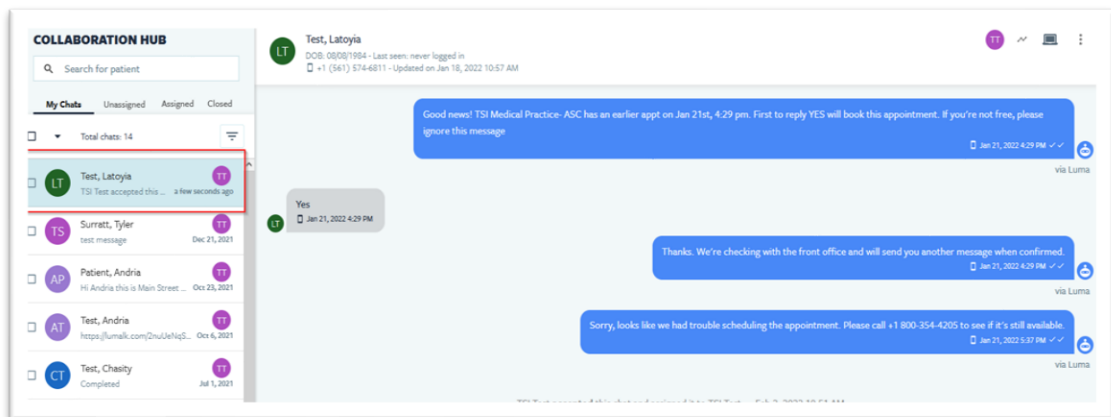
- **My Chats**- This tab houses all of the chats that have been assigned to you.



- This is where you can see all messages that have been assigned directly to you.



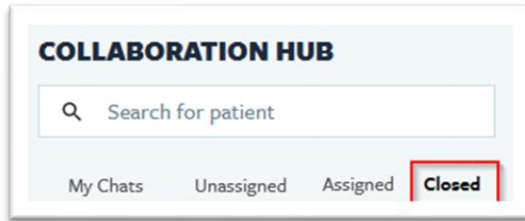
- If you click on a patients chat, you will be able to see all the chats and responses for this patient.





How to: Use the Collaboration Hub

- **Closed-** This tab is where you will find all of the chats that are complete and do not need any further attention from the staff.



- Once you have sent all necessary information to the patient and have answered all their questions, and there is nothing else that you need to provide to this patient, you will want to close out of the conversation.
 - If you do not close out of the conversation, the patients will stay in your My Chats folder. Therefore, any future automated communications that the patient may receive within Luma and they respond back with an unexpected response will come back to your My Chats folder because that patient is still assigned to you.
- To close messages in the hub, you will need to need to click on the 3 dots in the upper right-hand corner of the chat window.



- Click on Mark as closed.

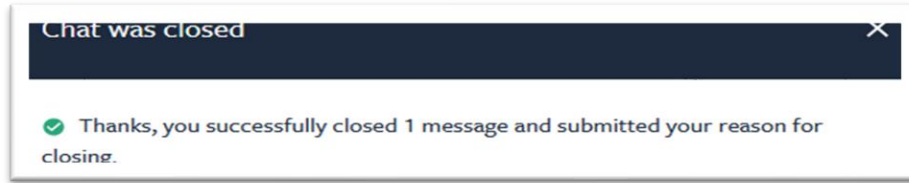


- You will then see a screen pop up that states to select a reason for closing. You will need to select one of the reasons, then click Submit. If the reason you're closing the chat is not listed you can click on *other* and then type in your response in the box provided underneath, then click Submit



How to: Use the Collaboration Hub

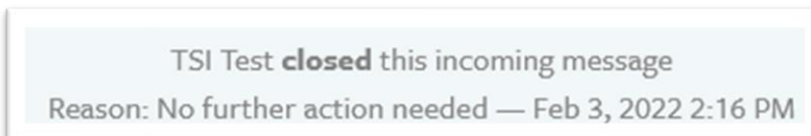
- You will receive a message that lets you know that the chat has been closed.



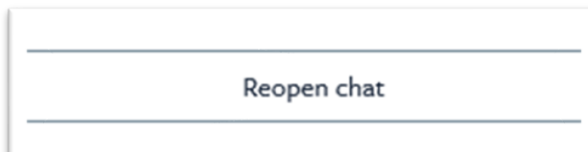
- You will now see this chat in your *Closed* tab.



- Also, inside the *Closed* tab, you can see who closed a message, the reason it was closed, along with the date and time it was closed.



- If for some reason you need to reopen a closed message, you can do so by clicking on the *Reopen chat* button at the bottom of the chat screen.





How to: Use the Collaboration Hub

- When a chat is reopened, you can see who reopened a message, along with the date and time it was reopened. That chat will then go to that staff members My Chats folder.

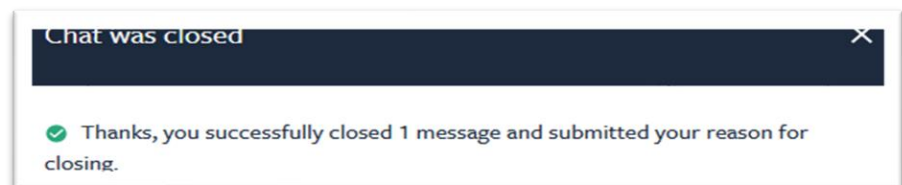
The chat has been **reopened** by TSI Test — Feb 3, 2022 3:51 PM

- If a patient's response is more than 16 characters but does **not** require a reply, you will just select the *Mark as closed* button directly from the Unassigned tab.



- You will then see a screen pop up that states to select a reason for closing. You will need to select one of the reasons, then click Submit. If the reason you're closing the chat is not listed you can click on *other* and then type in your response in the box provided underneath, then click Submit

- You will receive a message that lets you know that the chat has been closed.



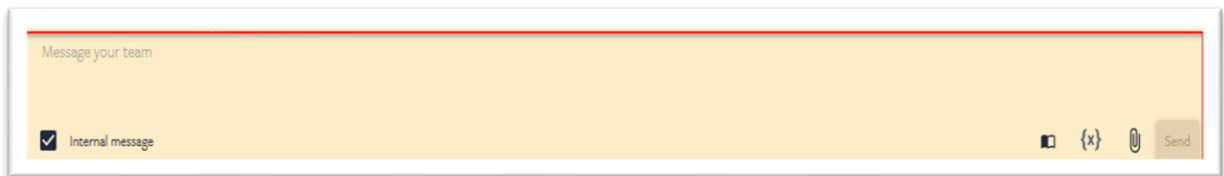
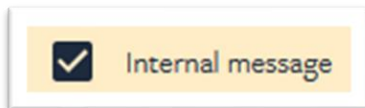
- This message will then appear in the Closed tab.



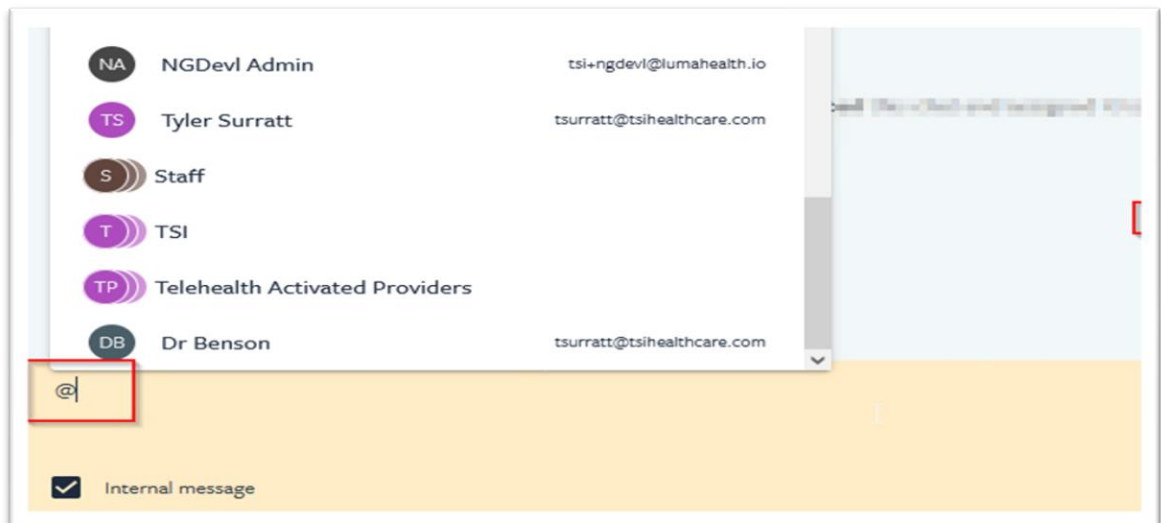
How to: Use the Collaboration Hub

What type of messages can I send?

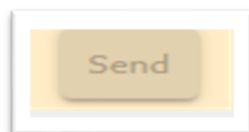
- ❖ There are two options when sending messages inside a patients chat. You can send an internal message to staff that has a Luma account or you can send a message directly to the patient.
 - Sending a message internally will only be viewed by your staff. The patient will not be able to view any messages sent internally. You can choose to send a message to an individual staff member (circle with their initials inside) or to a specific group (multiple circles with the name of the group next to it). When sending a message internally, you want to be sure to select the box next to internal message. The message box will turn yellow.



- To start an internal message, you will begin by using the @ symbol to select the individual staff member or a specific group.



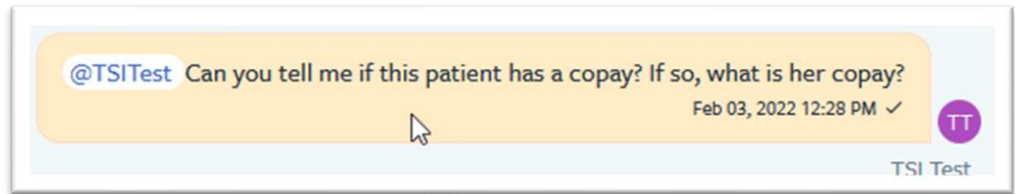
- Then you can type your message. Once your message is complete, click the send button on the bottom right side of the screen.



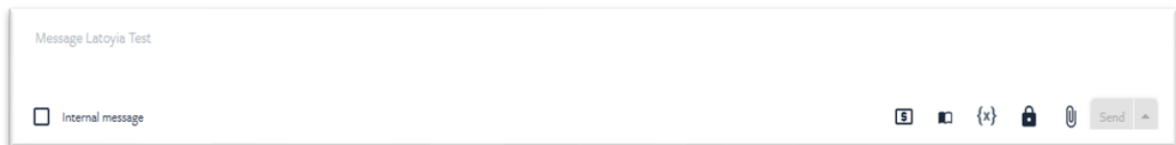
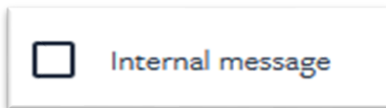


How to: Use the Collaboration Hub

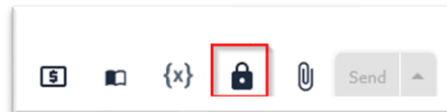
- This will send your message to that individual staff member or to everyone that is assigned to the specific group that you selected.



- Sending a message to the patient allows you to chat directly with the patient through text message. When sending a message directly to the patient, you want to be sure to unselect the box next to internal message. The message box will turn white.



- You have two options when sending messages directly to patients. You can send a secure message or an unsecure message.
 - **Sending a message secure:**
 - Messages are automatically defaulted to send securely. You will see a lock icon located at the bottom right in the text message box.

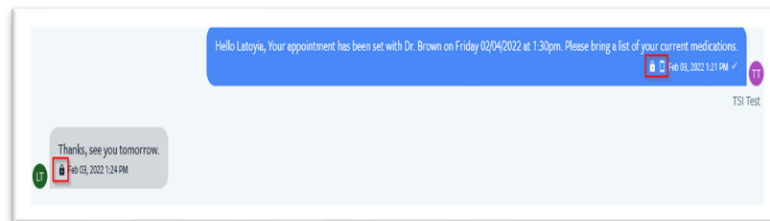


- If you send a message securely, the patient will need to verify their identity by entering their name and date of birth prior to seeing the contents that were sent. This allows you to send patients information in a HIPAA compliant way.



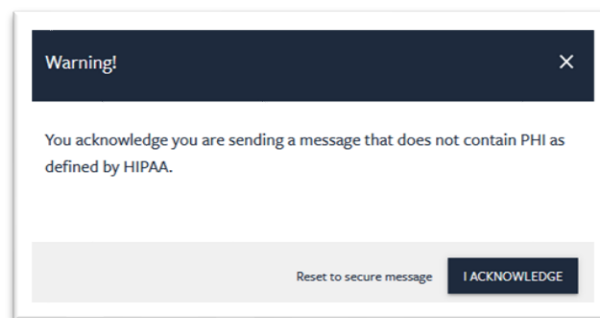
How to: Use the Collaboration Hub

- Once you send a message to a patient securely, it would show up with the lock icon at the bottom of each message to indicate that the message was sent securely.

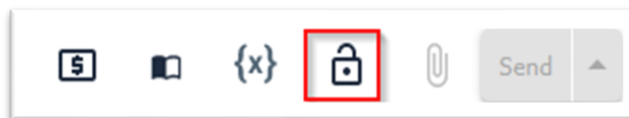


- **Sending a message unsecure:**

- If you want to send a message that does not contain PHI, you will need to click on the lock icon. Once you click on the lock icon you will receive the following message in the screenshot below; you would need to click the *I Acknowledge* button in order to move forward.



- ✓ You will now see an unlock icon located at the bottom right in the text message box

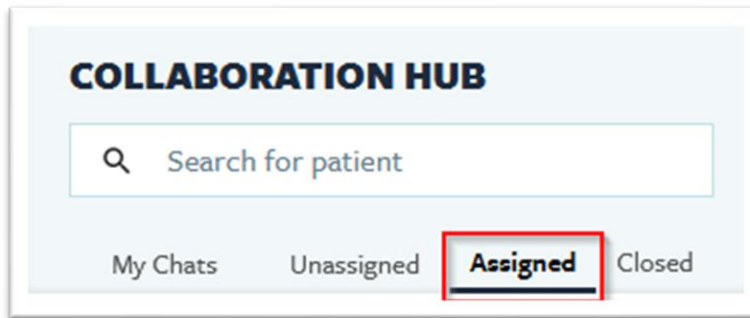


- ✓ If you send a message insecurely, the message will go directly to the patient's contact without going through any security measures.

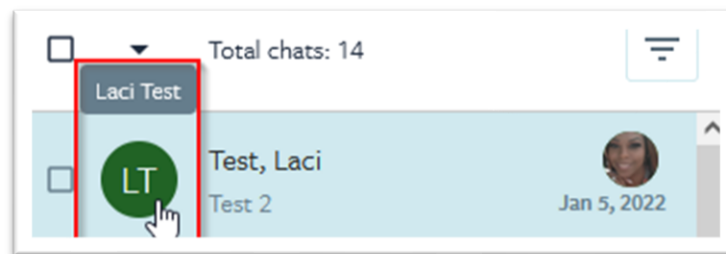


How to: Use the Collaboration Hub

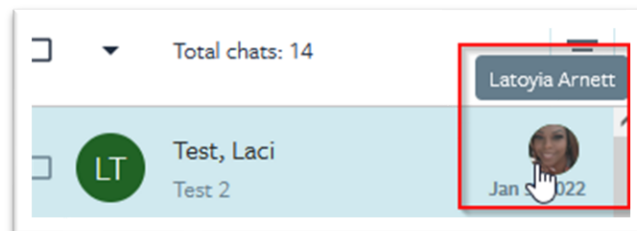
- **Assigned-** Allows you to see all patients that are currently assigned to any staff member that have access to Luma Health.



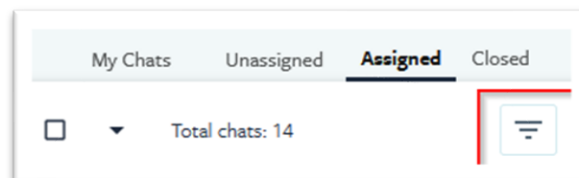
- Each message will display the initials of the patient on the left side. If you hover over the initials it will display the patient's full name.



- Each message will display the initials or photo of the Luma user it is assigned to on the right side. If you hover over the initials/ photo it will display the Luma user's name.



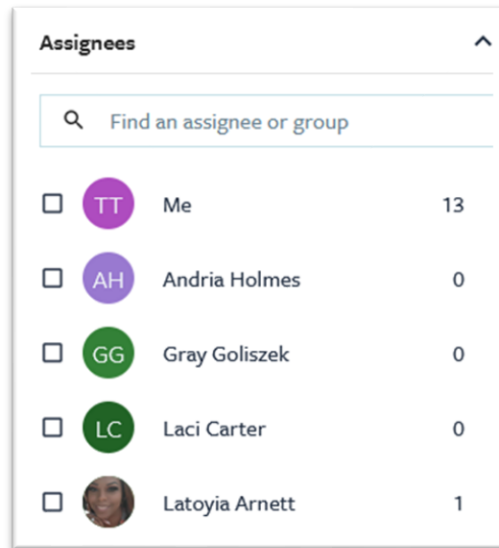
- This is beneficial to know just in case there is an employee that is out of the office, but have messages in their Luma My Chats tab that needs to be addressed.
- You can use the filter icon to see the messages for that Luma user.





How to: Use the Collaboration Hub

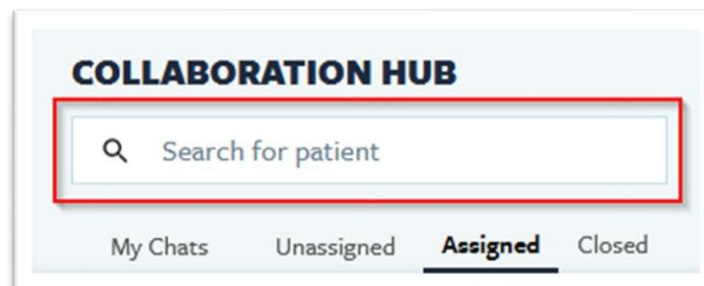
- You can type in the Luma user's name for faster navigation or use the stroll bar to find their name. Once you find their name click the check box next to their name.



- Click *Apply* at the bottom



- You will then be able to see all the chats assigned to that Luma user. You can reply to those chats and once complete, you can mark those messages as closed.
- You can also search for a patient by their name to find a chat. You will need to type their name in the *Search for patient* box. If they have any chats in Luma they will appear no matter who they are assigned to or the status of the chat.





How to: Use the Collaboration Hub

How to view a patient's Journey?

- Another option available in Luma is the patient's journey. If you click on the *Journey* icon in the upper right corner of the screen, it will bring up an additional section to the screen.



- This will allow you to see the patient's journey through your practice. It is separated by year. You will be able to see the patient's birthday, appointments, procedures, referrals, feedback responses, diagnosis, insurance card uploads etc. This allows you to monitor how a patient is moving within your practice.





How to: Use the Collaboration Hub

How to use the Hub Jr?

- The below icon is called the Hub Jr. This allows you to manage your Collaboration Hub from anywhere within your Luma account. All you need to do is click on the bubble message icon.



- You will be able to monitor your unassigned queue, interact with your assigned messages, and view any closed messages. Your Hub Jr works exactly the same way that your Collaboration Hub does.

If you have any questions, please contact helpdesk@tsihealthcare.com