



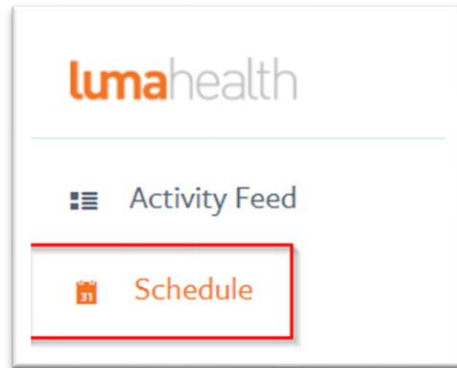
How to: Use the Luma Schedule

Overview

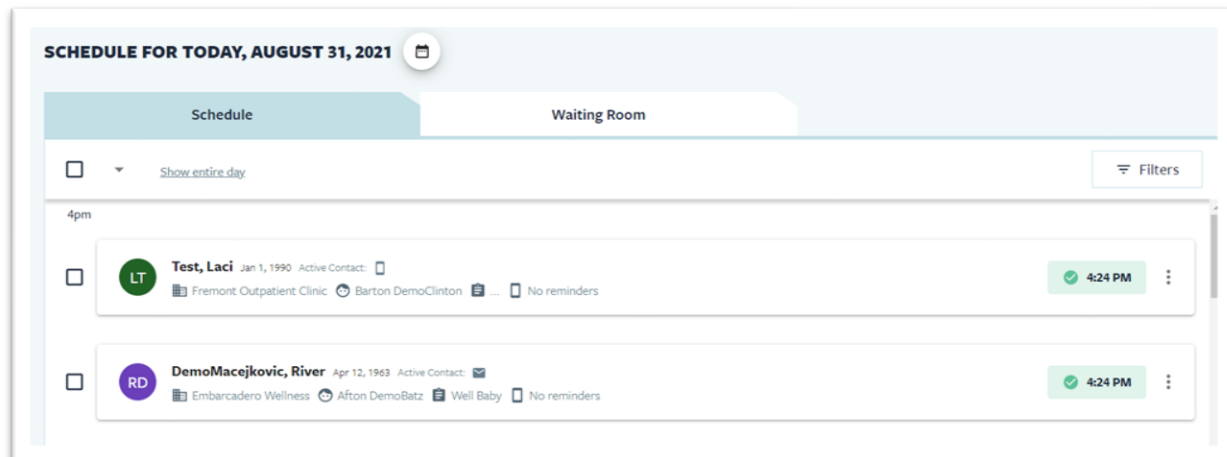
One of the many features included in your Luma Health package is the ability to view your NextGen schedule within your Luma account. We will now take a deep dive into how the Luma Schedule works and how you can benefit from this feature!

How do I navigate to the Luma Schedule?

- Login to the Luma Health portal
- *Select Schedule* from the left navigation bar



- Your screen should look similar to this



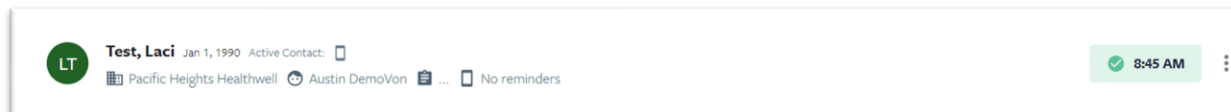
- **Note: The schedule in Luma is a reflection of your NextGen appointment book. It is *NOT* the Luma appointment reminder schedule. Everything you see on this screen is based off what you have scheduled in your NextGen system.**
 - If you have an appointment type that you schedule appointments for but you don't allow Luma to send reminders for them, those appointments *will still* show on this screen.



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How do I view appointment information on the Luma Schedule?

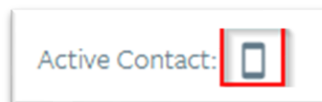
- When viewing the schedule, you will be able see the patient's first/last name, their date of birth, their active contact, the facility the patient is scheduled to be seen at, the provider or resource they are scheduled to see, the appointment type and their appointment time.



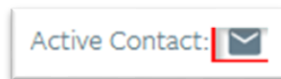
○

- ❖ You can determine the patient's active contact by looking at the icon next to *Active Contact*.

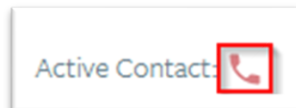
- If you see what looks like a cell phone, the patient's active contact is SMS and they receive text reminders.



- If you see what looks like an envelope, the patient's active contact is Email and they receive email reminders

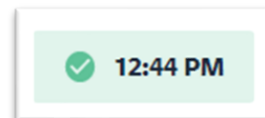


- If you see what looks like a telephone, the patient's active contact is Voice and they receive phone call reminders.



- ❖ On the far right hand side of the screen where you see the time of the patient's appointment, this will be color coded based on the appointment's status.

- If the appointment has been confirmed from a Luma reminder or a staff member confirmed the appointment in your NextGen system, the appointment time will show in green with a green check mark.



- If you hover on the appointment time, a pop up will appear that reiterates that the appointment has been confirmed.



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This patient confirmed their appointment

1.

- If the appointment has not yet been confirmed from a Luma reminder or by your staff in your NextGen system, the appointment time will show in grey with a grey question mark.

? 12:44 PM



- i. If you hover on the appointment time, a pop up will appear that reiterates that the appointment has not been confirmed.

This patient hasn't confirmed their appointment yet

1.

- If the appointment has been canceled from a Luma reminder or by your staff in your NextGen system, the appointment time will show in red with a red x.

✘ 11:00 AM



- i. If you hover on the appointment time, a pop up will appear that reiterates that the appointment has been cancelled.

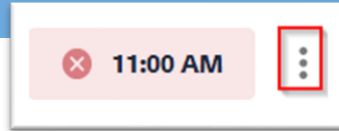
This patient cancelled their appointment

1.

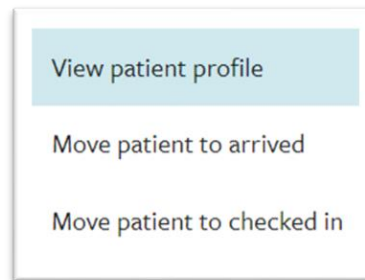
- ❖ There are three dots beside the appointment time that will open an additional menu.



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- When you click on the three dots, the following options will show:

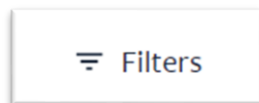


i.

1. *View patient profile*: This will be further explained on another cheat sheet.
2. *Move patient to arrived* and *Move patient to checked in*: If your practice uses the Zero Contact Check In feature as part of Luma Plus, you will be able to utilize these options. This will be further explained on another cheat sheet.

How do I filter the Luma Schedule?

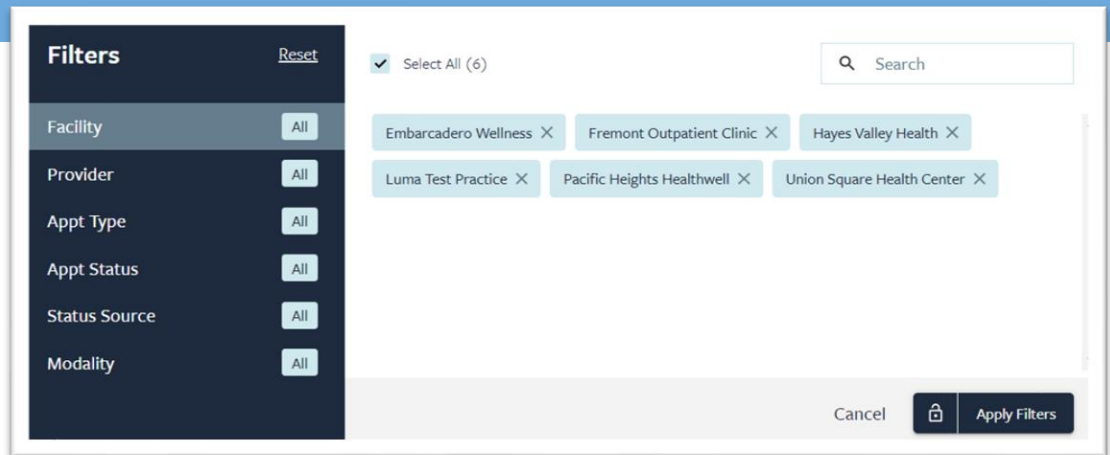
- You are also able to filter the data in your Luma schedule so that you are only returning the patients that you want to see.
 - The *Filters* button is at the right hand side of the Schedule.



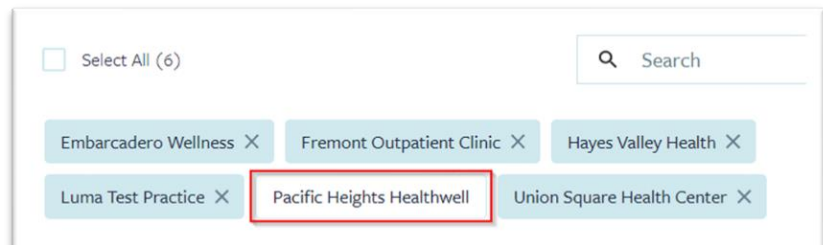
- Once you click the *Filters* button, you will see the screen below:



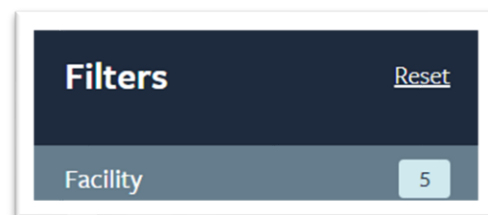
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- By default, all of your facilities, providers/resources, appointment types, and appointment statuses are selected.
 - If you are a practice that has multiple facilities and you only want to view specific facilities, you can choose one of the highlighted facilities to deselect that facility.



- i.
- ii. In this example, you will see the facility count has changed from *All* to *5* after deselecting one of the facilities.

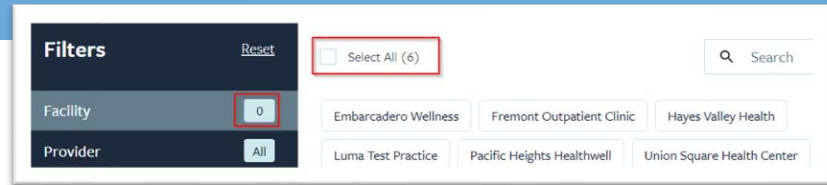


1.

- iii. If you want to turn that facility back on, select it and it will show as highlighted again.
 - You can also deselect all of the facilities and choose the specific facilities that you want to see in your Schedule. You will know all of the facilities are deselected when the Facility count in the menu has changed to *0*.

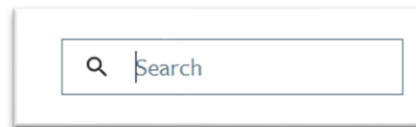


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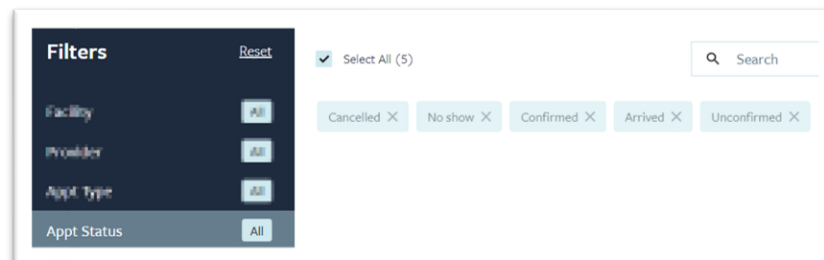


- i.
- **Note:** You can complete the above steps for all filter options.

- If you have a large number of providers or appointment types at your practice, you can utilize the search bar to find that provider or appointment type.



- i.
- You can filter your schedule based on whether the patient confirmed their appointment, cancelled their appointment, or has not confirmed their appointment yet.

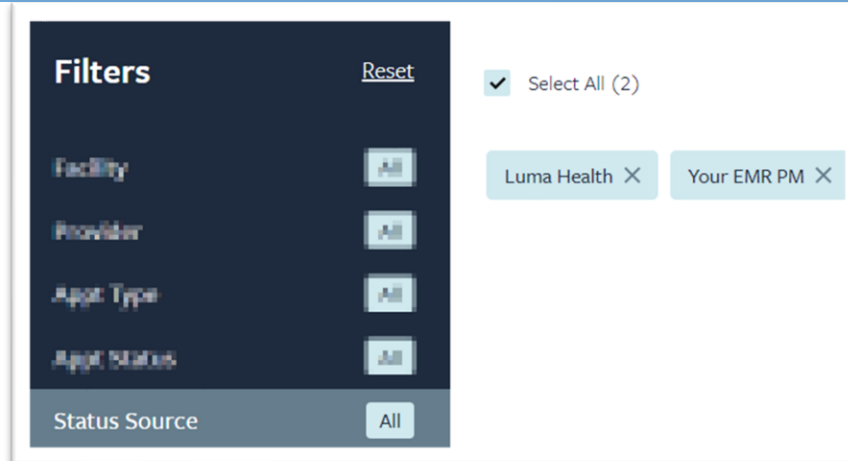


- i.
1. You will also see additional statuses here such as *No Show* and *Arrived*.
 - a. If you are looking for appointments that have occurred in the past, you can utilize the *No Show* option.
 - b. If you are a practice that uses the Zero Contact Check In feature, you can utilize the *Arrived* option.
 - ii. You can choose whether the data in the Luma schedule is pulling from Luma reminders, your EMR PM system, or both. By default, both Luma Health and EMR PM are selected (this shows confirmations/cancellations made



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from your Luma reminders *and* your NextGen system).

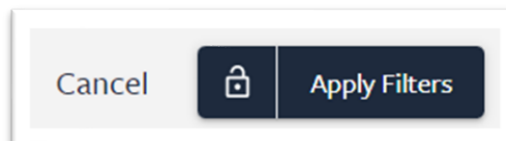


1. Luma Health
 - a. If you *only* have this selected, you will *only* see patients on the schedule that had their appointment confirmed or cancelled through your Luma reminders.

2. EMR PM
 - a. If you *only* have this selected, you will *only* see patients on the schedule that had their appointment confirmed or cancelled through your NextGen system

3. Luma Health & EMR PM enabled
 - a. **You can only see unconfirmed appointments when both *Luma Health* and *Your EMR PM* options are selected.**

- You have a few options at the bottom of the filters screen.




- i. If you accidentally opened the Filters or you did not need to make any changes, you can choose the *Cancel* option to exit the Filters screen.



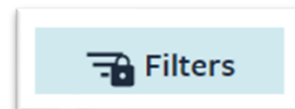
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- ii. You can choose *Apply Filters* after you have edited the filters to your liking. This will save your changes and take you back to your Schedule so that you can see these applied changes.

- iii. You can choose the  icon to lock your filters.
 1. If you always want your schedule to return results based on the filters you have selected, choose this icon to save the filters and you will see the icon

change to .

- a. After locking your filters, if you ever leave the schedule and come back to it, these filters will always remain.
- b. As a reminder, you will see the lock icon by your Filters button on your schedule if you have locked your filters.



i.

2. To reset back to the default filter options, you can go back into the Filters screen, choose *Reset* and then *Apply Filters*.



a.

How do I view different days on the Luma Schedule?

- You can change the day that you are looking at on your Schedule by clicking on the calendar icon at the top of the Schedule screen.

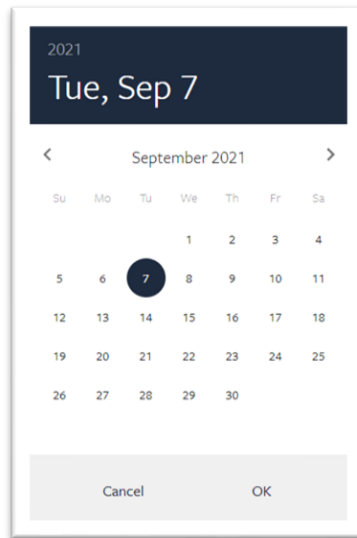


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How to: Use the Luma Schedule

- This will open a calendar where you can select the day of appointments that you would like to view. Click on your preferred day and the schedule will change to reflect the appointments for that day.



If you have any questions regarding the information included in this document, please contact helpdesk@tsihealthcare.com