



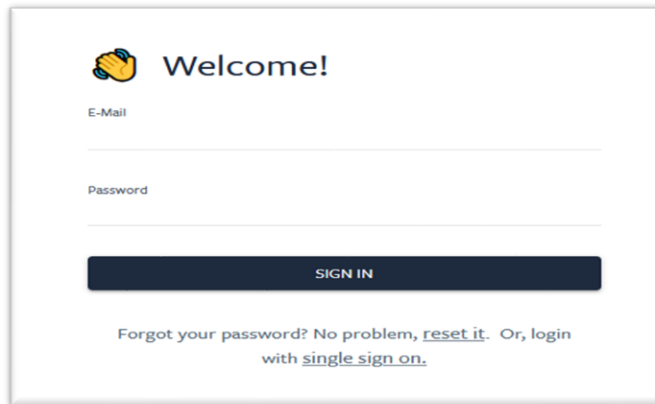
## How to: Utilize Luma Reports

### Overview

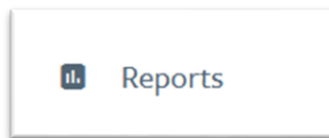
One of the many features included in your Luma Health package is the ability run reports to gather data on the various Luma features. We will now take a deep dive into how the Reports feature works and how you can benefit from this!

### How do I navigate to Reports?

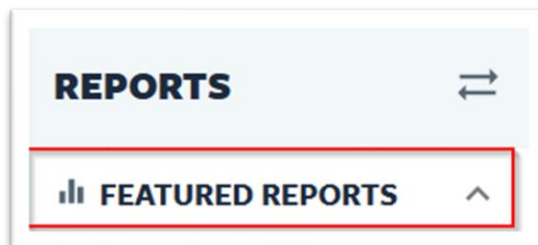
- ❖ Log onto <https://next.lumahealth.io/> with your email and password
  - If you are unable to remember your password, open a ticket with [helpdesk@tsihealthcare.com](mailto:helpdesk@tsihealthcare.com)



- ❖ Select *Reports* from the left navigation bar



- ❖ You will see a sidebar titled *Reports*.



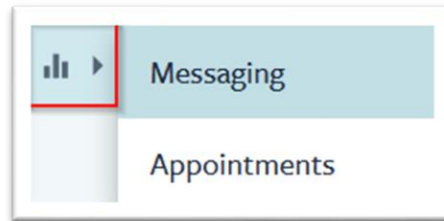
- You can click the arrows to the right of the word *Reports* to collapse this sidebar entirely for more space to view your report data





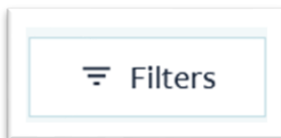
## How to: Utilize Luma Reports

- When the sidebar is collapsed, you can navigate to other reports by hovering over the category icon and choosing the name of the report you want to view

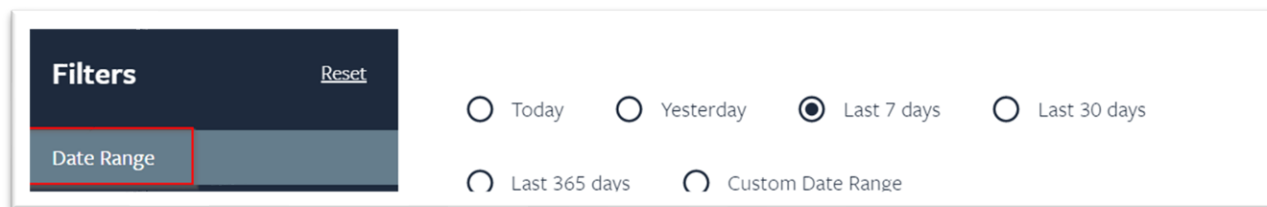


### How do I filter my Report data?

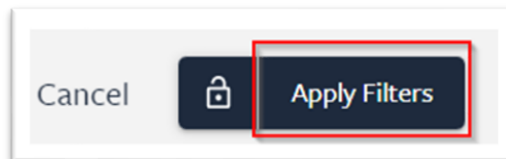
- You can filter the data you pull for each report by clicking on the *Filters* button at the top right of the report screen



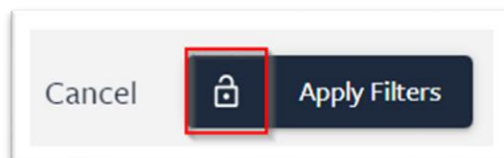
- You will find several filter options, depending on the current report you are viewing
- By default, all reports will show 7 days' worth of data. If you would like to change this, you can choose a different date at the *Date Range* filter



- After making all changes to your filters, choose *Apply Filters* at the bottom right of the Filters screen



- If you find yourself utilizing the same filter options, you can lock your filters by choosing the lock icon from within the Filters screen and choosing *Apply Filters*

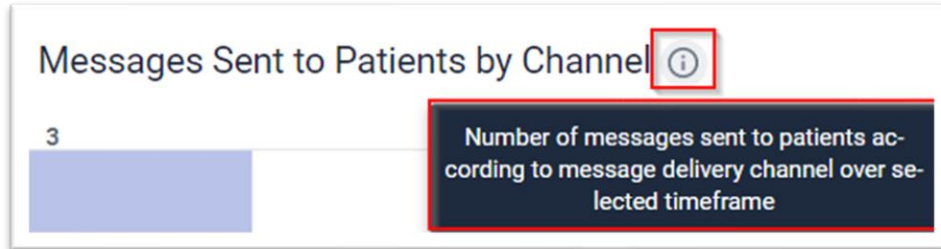




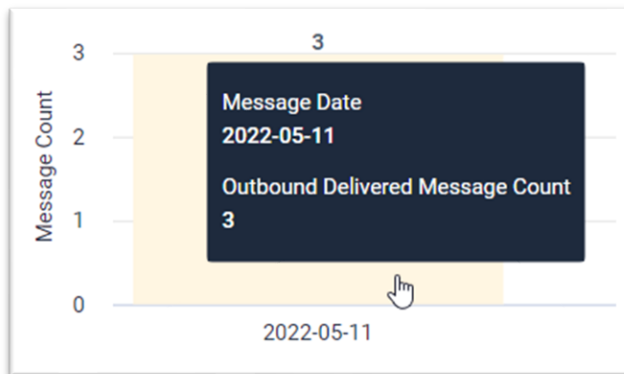
## How to: Utilize Luma Reports

### How do I review and download Luma Reports?

- ❖ Each report will have an “i” beside its name that will detail more information about that specific report when you hover over the icon



- ❖ All of the reports are interactive, meaning you can click on sections of the report to view specific data



- Once you click on a portion of the report, a separate window will appear with the data specific to that report

| Message Deliverability |                          |                    |                   |                       |
|------------------------|--------------------------|--------------------|-------------------|-----------------------|
| MESSAGES (9 Filters) ▾ |                          |                    |                   |                       |
|                        | Patient ID               | Patient First Name | Patient Last Name | Patient Date of Birth |
| 1                      | 61c0bdef1db75e002bf59757 | Test               | Gibson            | 1/1/1990              |
| 2                      | 627bd0b45a86b70024d448eb | M T                | Gibson            | 10/4/1920             |
| 3                      | 61c0bdef1db75e002bf59757 | Test               | Gibson            | 1/1/1990              |

- ❖ You can download reports in two ways:
  - On the initial report screen
    - Hover your mouse to the right of the report name and 3 dots will appear



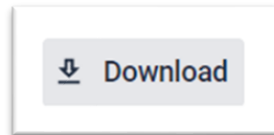


## How to: Utilize Luma Reports

- **Note:** If exporting to Excel or CSV file, this will produce a count of the data for that specific report

|   | A               | B        | C        | D        | E           | F             | G |
|---|-----------------|----------|----------|----------|-------------|---------------|---|
| 1 | Message Dynamic | Outbound | Outbound | Outbound | Undelivered | Message Count |   |
| 2 | 5/11/2022       | 3        | 0        | 0        |             |               |   |
| 3 | 5/12/2022       | 0        | 0        | 0        |             |               |   |
| 4 | 5/16/2022       | 3        | 0        | 0        |             |               |   |

- You can choose the format in which you want to export the data (CSV, Excel spreadsheet, PNG, etc.)
- After choosing an interactive portion of the report, choose *Download* at the next window that appear



- You can choose the format in which you want to export the data (CSV, Excel spreadsheet, PNG, etc.)
- **Note:** If exporting to Excel or CSV file, this will provide more specific patient data based on the report chosen

|   | A          | B           | C          | D          | E          | F           | G          | H                          | I           | J          | K         | L         | M         | N       | O |
|---|------------|-------------|------------|------------|------------|-------------|------------|----------------------------|-------------|------------|-----------|-----------|-----------|---------|---|
|   | Patient ID | Patient Fir | Patient La | Patient Da | Patient SV | Patient Err | Patient Vo | Patient Ext                | Patient Sei | Message II | Message C | Message S | Message C | Message |   |
| 1 | 61c0bdef1  | Test        | Gibson     | 5/11/2022  | 3          | 0           | 0          | 47ADC96-4DC2-40D627c01cfa  | #####       | sent       | chat      |           |           |         |   |
| 2 | 627bd0b4   | M T         | Gibson     | 5/12/2022  | 0          | 0           | 0          | A55D7513-F053-4448627bd35b | #####       | delivered  | sms       | en        |           |         |   |
| 3 | 61c0bdef1  | Test        | Gibson     | 5/16/2022  | 3          | 0           | 0          | 47ADC96-4DC2-40D627bcc723  | #####       | delivered  | sms       | en        |           |         |   |

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