



Luma Lite Conversion FAQ

Overview

We've created this reference tool to explain the differences between PhoneTree Healthwave Connect and Luma Health Patient Engagement Platform. This is a quick reference tool to accompany your Luma Lite Kick Off Call.

Text First Algorithm

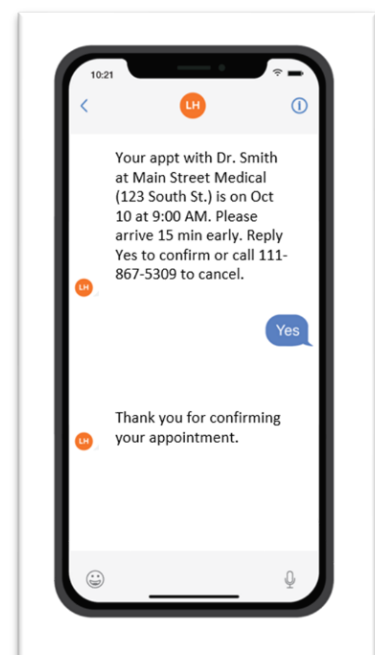
- ❖ Luma is a text first solution so majority of your patients will receive their appointment reminders as a text message.
 - If Luma detects a cell phone in the home, day or cell phone field of the patient's demographics in NextGen, the patient will receive a text reminder
 - If no cell phone is present and an email address is in the email field, the patient will receive an email reminder
 - If no cell phone or email address, then the patient will receive a phone (voice) reminder
- ❖ This differs from Phonetree, where majority of patients receive their appointment reminder as a phone call.

Luma Outreach

- ❖ Luma reaches out to patients to reinforce their appointment time
 - Example:
 - If a patient's appointment is at 8:00 am, they will receive their appointment reminder around 8:00 am.
- ❖ Luma appointment reminders will go out to your patients throughout the day.
 - This differs from PhoneTree, where patient outreach is delivered within a set timeframe each day

Sample Appointment Reminder

- ❖ Luma's Text Reminder includes the following:
 - Provider name
 - Facility name
 - Facility Address
 - Appointment Date/Time
 - Applicable special instructions
 - Patient Response Instructions

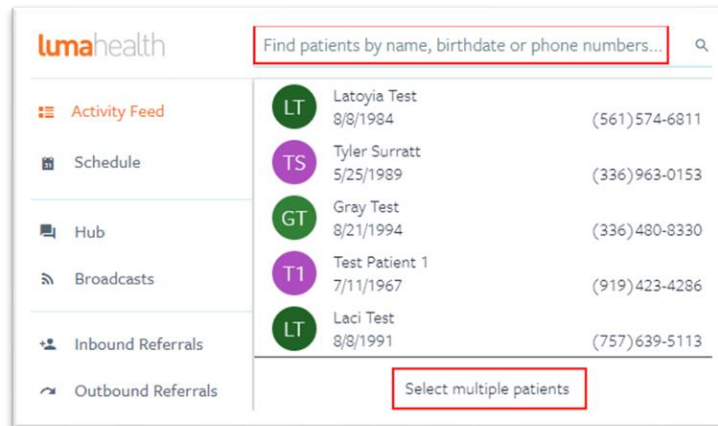




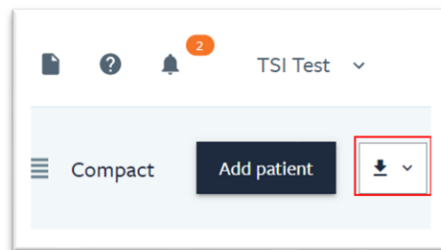
Luma Lite Conversion FAQ

Do Not Contact/Patient Opt Outs

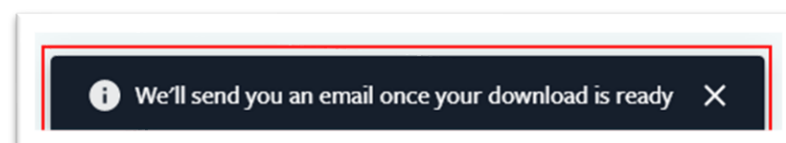
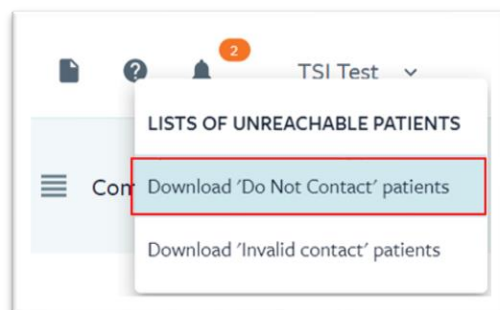
- ❖ Patients can opt out of Luma reminders by replying **Stop** or **Wrong Number**. Luma will automatically place these patients in Do Not Contact status.
 - You can run a report to identify the patients who have replied *STOP* to Luma messages from your practice.
 - Note: Patients who reply *STOP* or *Wrong number*, will be put in the *Do Not Contact* status. To run a report to identify these patients:
 - Click the **patient search bar** at the top of your Luma Health dashboard
 - Click **Select multiple patients**



- Select the **download icon** in the patient list toolbar (right side of the screen)



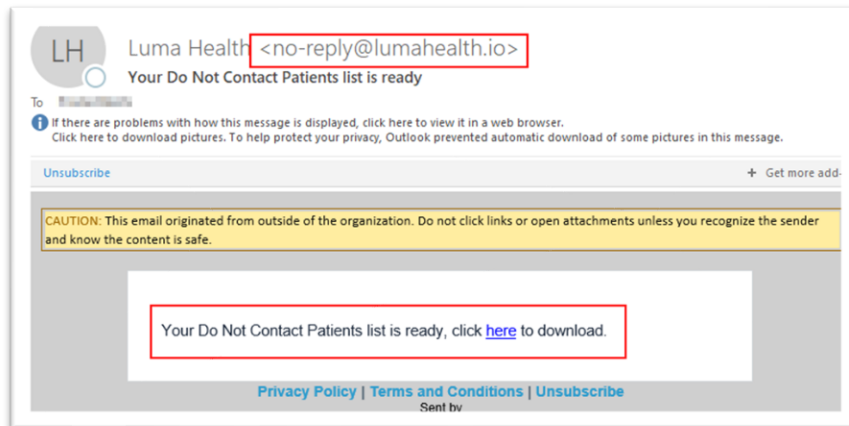
- Select the **Download 'Do Not Contact' patients**. A message appears at the bottom of your screen which states, 'We'll send you an email once your download is ready'.





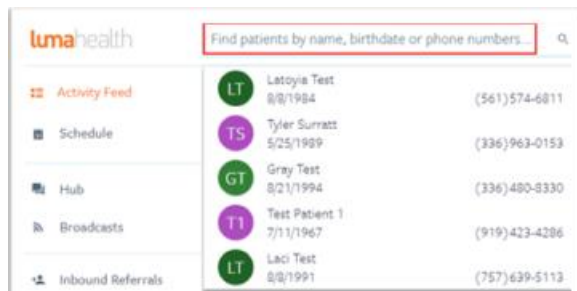
Luma Lite Conversion FAQ

- When the email arrives in your inbox, follow the instructions to download a CSV file. The file is sorted based on the date the patient opted out of the SMS messages, beginning with the oldest date on file.

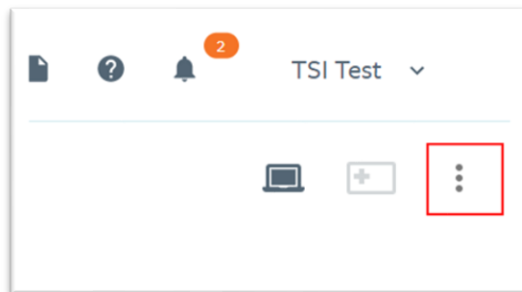


❖ You can also remove a patient from the *Do Not Contact* List

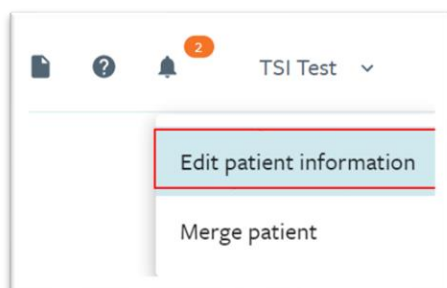
- Navigate to the Patient's chat window by searching for the patient in the **patient search bar**



- Select the **3 dots** in the upper right corner of the screen.



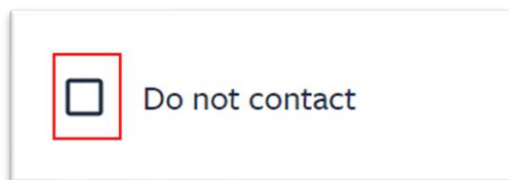
- Select **Edit patient information**





Luma Lite Conversion FAQ

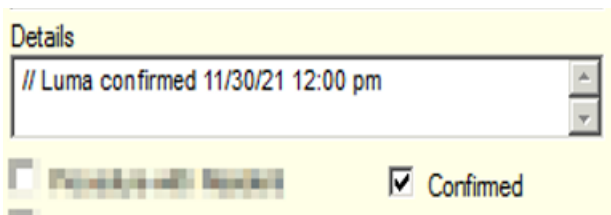
- Deselect the option **Do not contact** checkbox on the patient information screen.



Note: Deselecting the *Do not contact* checkbox will cause the patient's contact information, which was in Luma when the patient was first updated to *Do not contact*, to appear. If the contact information is not correct, it can be updated at this time.

Appointment Confirmation/Cancellation

- ❖ When patients reply *Yes* to their appointment reminder, Luma will do the following:
 - Check the confirmed check box in the appointment
 - Add a comment to the *Details* section of the appointment, stating that Luma confirmed with the date/time of the confirmation



- ❖ When patients reply *No* to their appointment reminder, Luma will do the following:
 - Check the cancelled check box in the appointment
 - Add a comment to the *Details* section of the appointment, stating that Luma cancelled with the date/time of the confirmation
 - If the cancellation reason field is required in your system, Luma will overwrite this field as the patient is not providing a reason for cancelling.
 - Appointment will be removed from your schedule by Luma

Broadcast Messages

- ❖ You are now able to send your own mass messages to your patients!
 - This can be utilized for inclement weather, office closures, unexpected schedule changes, providers out of the office, etc.
 - Please review the **How to Send Schedule Broadcast Messages** and/or **How to Use File Upload Broadcast** cheat sheets for more information on how to send broadcast messages
- ❖ You can add any commonly used messages to your Luma account
 - Please review the **How to Use the Broadcast Library** cheat sheet



Luma Lite Conversion FAQ

Reporting

- ❖ You are able to run reports to gather data about your Luma messages (appointment reminders and broadcast messages)
 - Please review the **How to Utilize Luma Reports** cheat sheet

Adding New Resources to Luma

- ❖ Practice Changes
 - Whenever a new *Provider/Resource, Event Type* or *Location* is added in NextGen, the practice is responsible for opening a case with the helpdesk via email or phone. This is to inform TSI that a new *Provider/Resource, Event Type* or *Location* was added in NextGen. Once the case is opened, the TSI Luma support team will update your Luma account with the new *Provider/Resource, Event Type* or *Location* and enable it for the appropriate features.
 - If appointment reminders need to be enabled for the newly added practice resource(s), please include any special instructions in the case when it is opened.
 - For example: Rename Jane Doe to Dr. Jane Doe OR New Patient 30 event type needs the following special instructions "arrive 30 minutes early with your insurance card + photo ID"

Please communicate to your providers TSI is your sole source for Luma Health support. Direct support questions or concerns to 800.354.4205 or helpdesk@tsihealthcare.com