



Overview of Referral Statuses

Overview

One of the many features included in your Luma Health package is the capability to manage Inbound and Outbound patient referrals within your Luma account. We have detailed a breakdown of the different referral statuses below and how they relate to your workflow.

How do I review the Referral Statuses?

- ❖ 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 several Referral Statuses which apply to both Inbound and Outbound referrals. Every referral will show a status letting you know at what stage the referral is. We will review details of each status below.

- **Active**
 - Luma is actively reaching out to this patient. The patient will stay in the *Active* status until they call your office, are marked as scheduled or cancelled, or the referral expires.



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- **Called**
 - Luma is still actively contacting these patients. Patients with this status have called your office, but have not yet been marked as Scheduled.
 - Note: even if a patient has called your clinic, it does not mean they have been scheduled.
- **Cancelled**
 - Cancelled referrals have been manually cancelled by your office staff. This could be due to a patient no longer needing the referral.
- **Closed**
 - Closed referrals have been manually closed by your office staff. Luma has stopped messaging these patients regarding their referral. This status is for any situation where you want to stop messaging the patient, for example, if the provider is no longer accepting patients.
- **Expired**
 - Luma is no longer actively contacting these patients because the referral end on date has passed. A referral expires after the maximum number of contact attempts has passed. This date can be found in the patient's referral details

Referral reminders start on	Referral reminders end on
06/03/2022	06/13/2022

- **Incomplete**
 - Luma contacted these patients the maximum number of times, but did not receive a response. The referral status will update to *Incomplete* two hours after the last outreach attempt.
- **Needs Approval**
 - These patients have been referred to your practice (Inbound Referral) via the Patient Referral Form. The referral must be approved by your staff before Luma can begin contacting the patient.
- **Pending**
 - Luma has not yet contacted the patient, but is scheduled to do so. The referral is in the system but the patient has not yet been contacted.
 - When the start date is scheduled for a future date, or when the referral is entered into Luma during your quiet hours, the referral will have a *Pending* status.
- **Scheduled**
 - These referrals are now complete because the patients have *Scheduled* an appointment as a result of the referral. When the patient has been scheduled in NextGen, Luma will update the referral status to *Scheduled*.
 - Note: if a referral is marked as *Scheduled* in Luma Health, but the appointment is later cancelled, the status of the referral will continue to be *Scheduled*.

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