



## Overview of the Patient Profile

### Overview

One of the many features included in your Luma Health package is the ability to see all aspects of the Patient Profile. You can view all types of communications sent to your patients, either by Luma or staff members, as well as the patient responses. You have the ability to update their demographic information as well as view their appointments. We will now take a deep dive into the features of the Patient Profile and how you can benefit from this feature!

### Navigating the Patient Profile

- ❖ 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)

- Once you have logged into your Luma account, you will see Luma Health's Home page. We will now review the *Patient Profile* in detail.

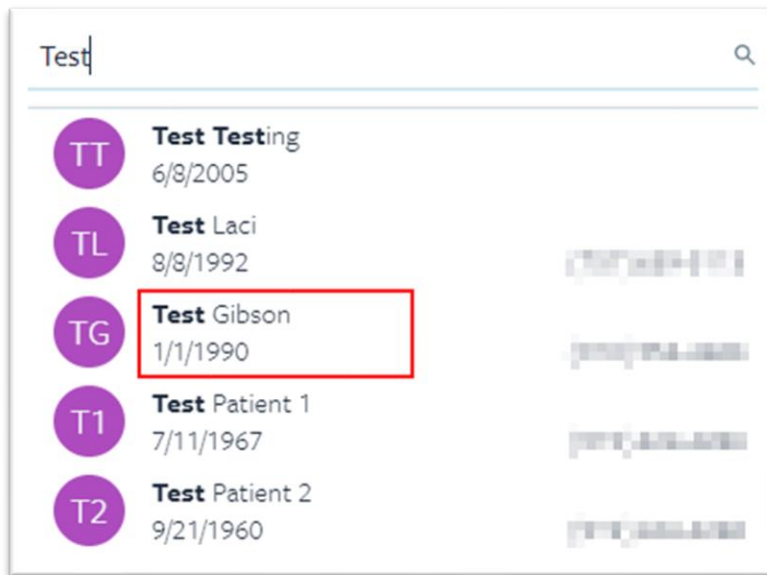
### Patient Profile Review

- ❖ **Search**
  - To view a patient's profile, first search for the patient in the search field at the top of the screen.  
Note: This search field is accessible from anywhere in the Luma platform.

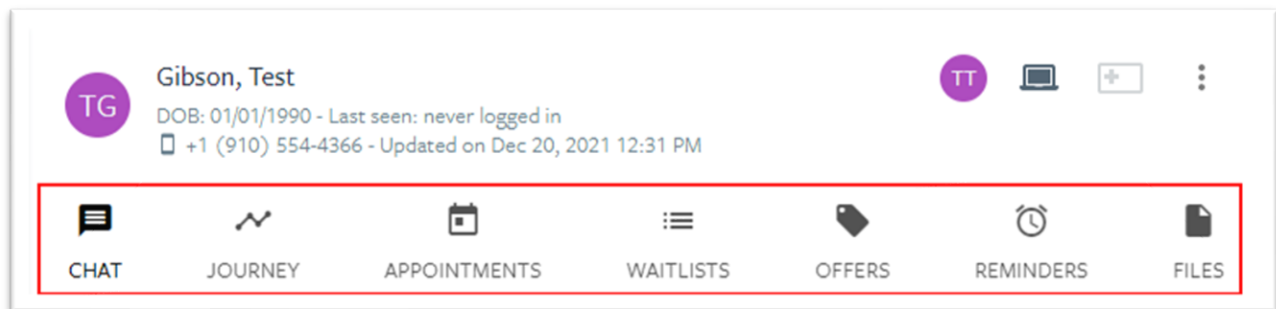


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- Enter the patient's Name, DOB or phone number



- Select the patient by clicking on their name, which will bring you to the patient's *Chat Window*.

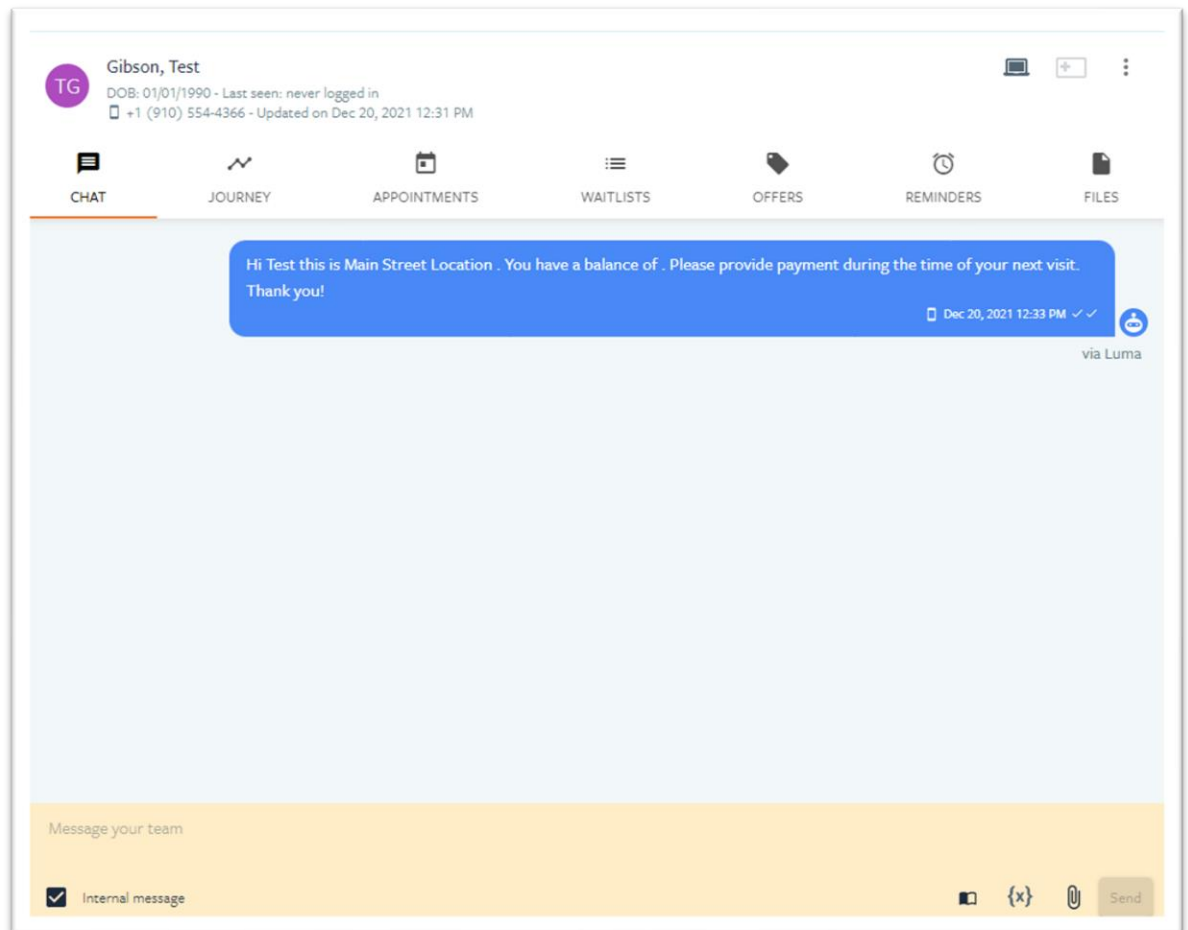


### ❖ Chat Window

- The patient profile view defaults to the *Chat Window*, which shows all *chat* communications with the patient.

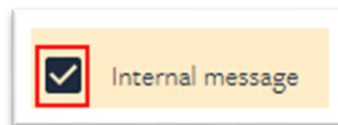


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### ▪ **Messages:**

- There are 3 types of messages that can be sent via the chat window.
  - *Internal Message*
    - Internal messages are used within your practice among staff members who have a Luma login. These are identifiable by the Internal Message box.

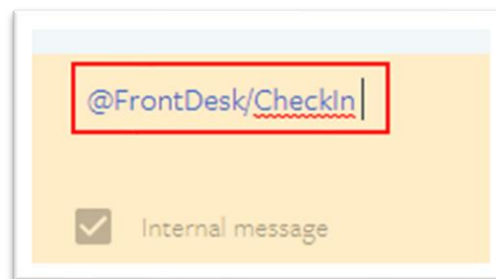
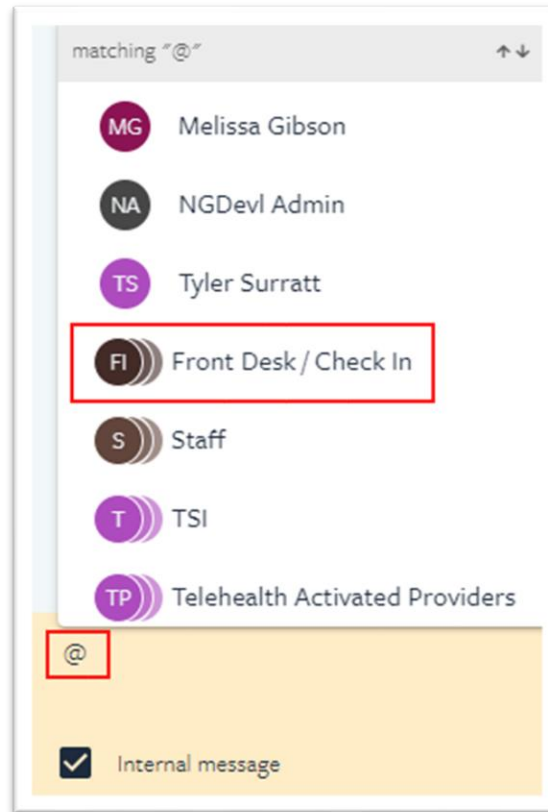


Note: these messages are only visible to other staff members and not seen by the patient.

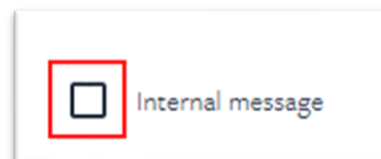
- *Internal Messages* can be sent to an individual User or User Group. You can do this by using the @ symbol then selecting a specific User or Group, which will populate into the message.



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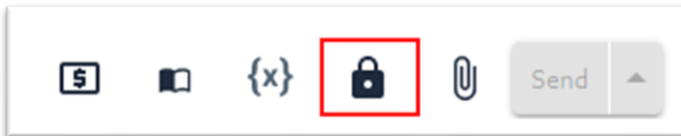
- *Secure Message*
  - This method is used when PHI is contained in the message being sent to the patient. The patient receives a message containing a secure link, which they must click on before they can see the contents of the message. The link directs them to a website where they are required to verify their identity by entering their First and Last Name and DOB.
  - To send a Secure message, deselect the Internal Message box, which will allow you to message your patient directly.





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- You will then see the lock icon in the bottom toolbar of the chat window.

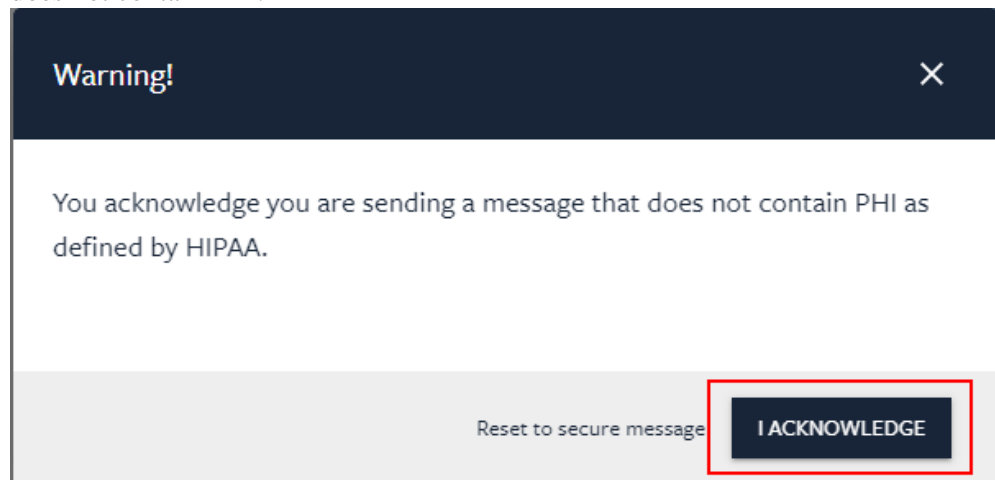


Note: all chat messages are sent securely by default.

- *Unsecure Message*
  - The unsecure message can be used when chatting with a patient, but not sending PHI.
  - To send an Unsecure message, click on the Secure message icon (lock)



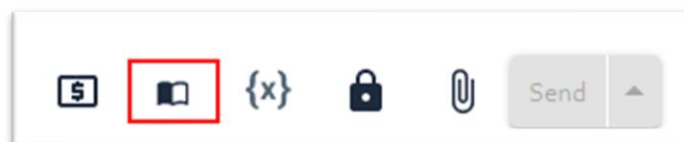
- This will open a window asking you to acknowledge the message does not contain PHI.



### ▪ *Icons*

#### • *Message Library*

- Luma offers a library of canned messages for use when sending messages to patients. To view these messages, click on the **Message Library icon**, then select the **message** you wish to send and click **Select**.





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×
Select message from library

**Insurance Upload**

Hi {{patient.firstname}}!

Can you please send us a copy of your latest insurance information

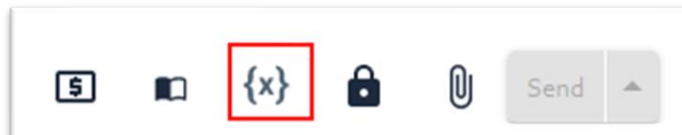
**Balance Message**

Hi {{patient.name}}! You have a balance of {{patient.balance}} due at today's appointment. You may pay using the following link, or provide payment in person via credit card. Thanks!

Cancel
Select

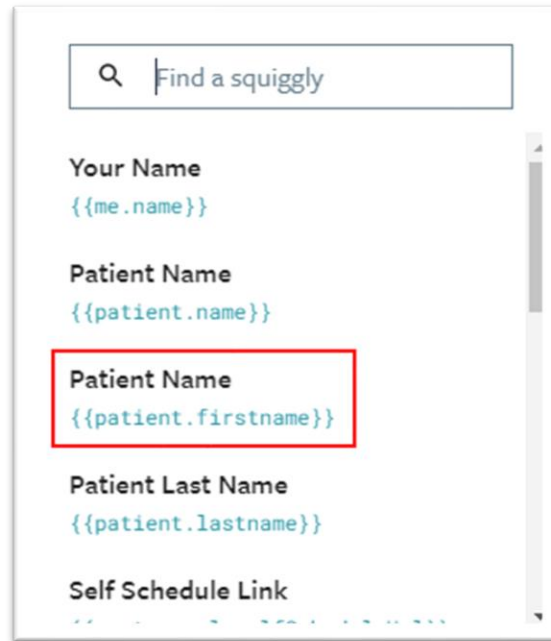
Note: New messages can be created and added to the *Message Library* by staff with Admin access.

- *Squiggly*
  - These allow you to personalize a message to a patient by for example, using their name when chatting with the patient. To view the available *Squiggly* options, click on the **Squiggly icon**, then select the personalization option you wish to insert.

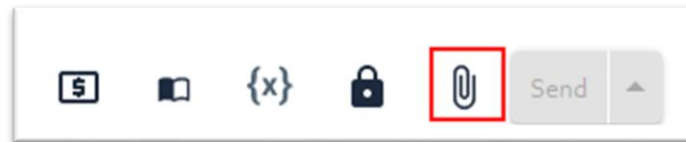




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- *Attachments*
  - Luma also offers the ability to send attachments to your patients through the *Chat Window*, such as a document or image. To do this, click on the **Attachment icon** (paperclip) to open the file explorer on your computer. Then select the document or image you wish to send.

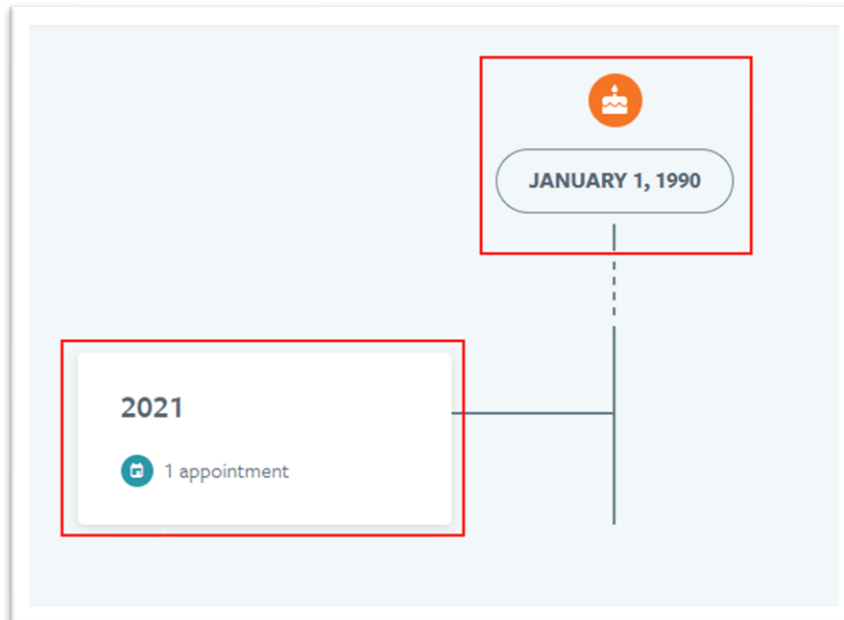


### ❖ Journey

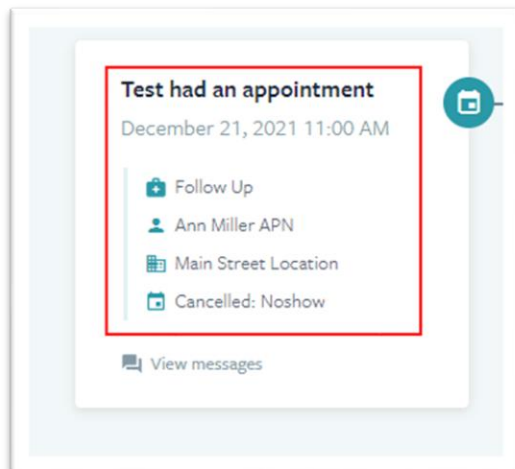
- The *Journey* tab will show your patient's journey through your practice starting with their date of birth. It will show a box of information for every year something significant has happened for that patient. These significant events are defined by Luma as actions or activities pertaining to the patient, such as *Appointments*, *Feedback* reviews, *Waitlist* offers, etc.



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- When you click on the **information box**, it will expand to show detailed information regarding that event, such as the appointment date and time, provider and facility. It will also show the appointment type and status.

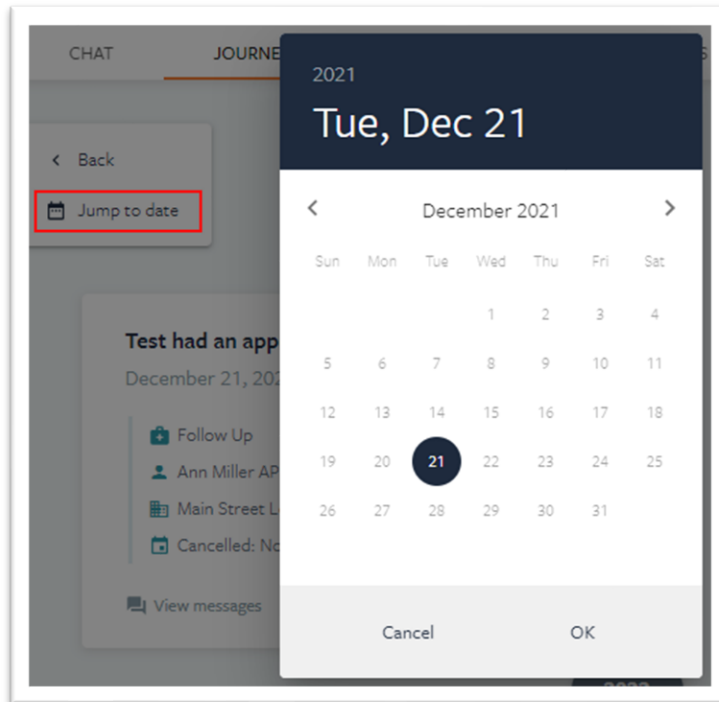


- You can also review a specific date by clicking on the **Jump to date** option and selecting the date accordingly.





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### ❖ Appointments

- The *Appointments* tab will show all upcoming and previous appointments for the patient. Specific appointment details from your NextGen schedule are visible on this screen, such as the date and time, location, provider, type of appointment as well as the status of the appointment.

Previous Appointments					Schedule appointment
DATE	FACILITY	PROVIDER	TYPE	STATUS	
December 21, 2021...	Main Street Location	Ann Miller APN	Follow Up	Canceled	

### ❖ Waitlist

- If a patient has been added to the *Waitlist*, it will show on this tab.



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DATE ADDED	ADDED BY	PROVIDER	FACILITY	APPT TYPE	DURATION	STATUS
May 23, 202...	TSI Test	Dr Benson	West Office	Follow Up	30 minutes	Waiting

- You can then click on it to view or edit the *Waitlist* details.

### Appointment Information

**TG** Test Gibson

Providers\*  Facility\*  Duration

Appointment Type  Preferred Date Range  -

Preferred Days  Preferred Time of Day

Notes



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### ❖ Offers

- If the patient has received any waitlist *Offers*, those will be shown here. It shows all of the details of the offer as well how long the patient has to respond or accept the offer. Note: if the *offer* is not accepted within the allotted amount of time, the *offer* will expire and be sent to the next eligible patient.

APPT TIME	FACILITY	PROVIDER	APPT TYPE	TIME REMAINING
May 23, 2022 12:10 PM	West Office	Dr Benson	Any	an hour

### ❖ Reminders

- The *Reminders* tab shows all sent and upcoming automated communications sent to that patient. It details the date and time the automated communications was sent or is scheduled to be sent, as well as the type of automated communication, whether it be for an appointment or feedback message. You can also view the facility and provider associated with the appointment. Sent *Reminders* will show the status and reason for undelivered messages.

DATE & TIME	TYPE	FACILITY	PROVIDER	MESSAGE	STATUS	REASON
03/25/2022 at 11:30 AM EDT	Followup	Main Street Location	Abbott, Thomas MD	Hi {{patient.firstna...	Sent	Any

### ❖ Files

- The *Files* tab represents a Luma Plus feature. This is where you would view Intake Forms and/or Insurance Card information submitted by your patients.

### ❖ Editing/Updating the Patient Profile

- You can change or update a patient's contact information directly within the Luma platform.
  - Click on the **3 dots** on the upper right of the patient chat window



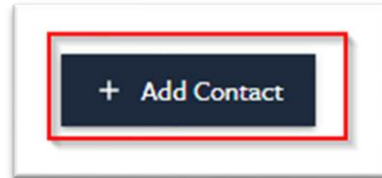
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- Select **Edit Patient Information**

- Update the patient's information accordingly
- Additional contact methods can be added to the patient's profile to also receive messages from Luma. This would be especially useful when a patient has a caregiver who may need to be aware of upcoming appointments.
  - To add a contact method, click on **Add Contact**



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- Select the type of contact, add the contact details and select the **Active** box. This will allow messages to go out to all Active contact methods.

- Contact numbers or emails can be deleted by selecting the **trashcan icon**



- Patients who wish to not receive communications through Luma can be put in a Do Not Contact status, by selecting the **Do not contact** box.

- This can be changed by unchecking the **Do not contact** box.
- Once all necessary changes have been made, hit **Save**

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