



Overview of the Patient Profile

Overview

One of the many features included in your Luma Lite package is the ability to see all aspects of the Patient Profile. You can view all types of communications sent to your patients. 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 to 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

- 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.

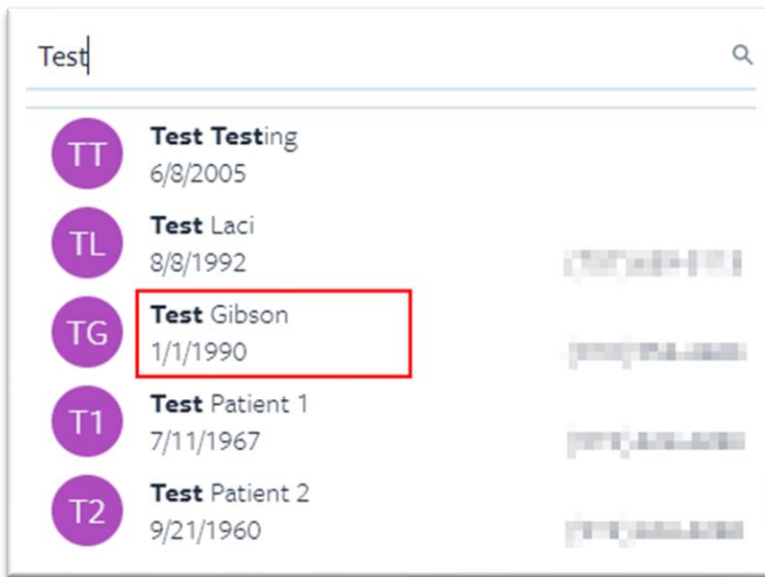
Patient Profile Review

- ❖ **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.

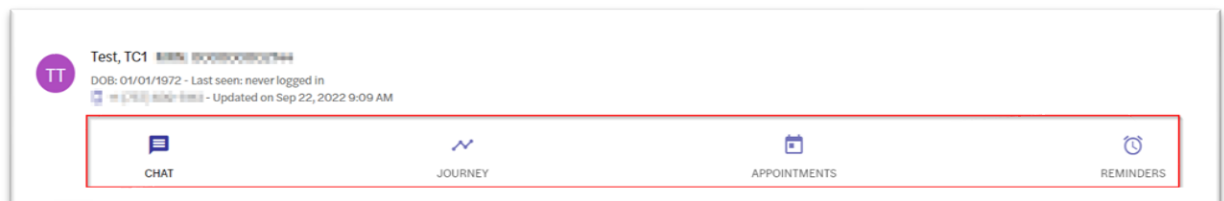


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- Enter the patient's Name, DOB or phone number

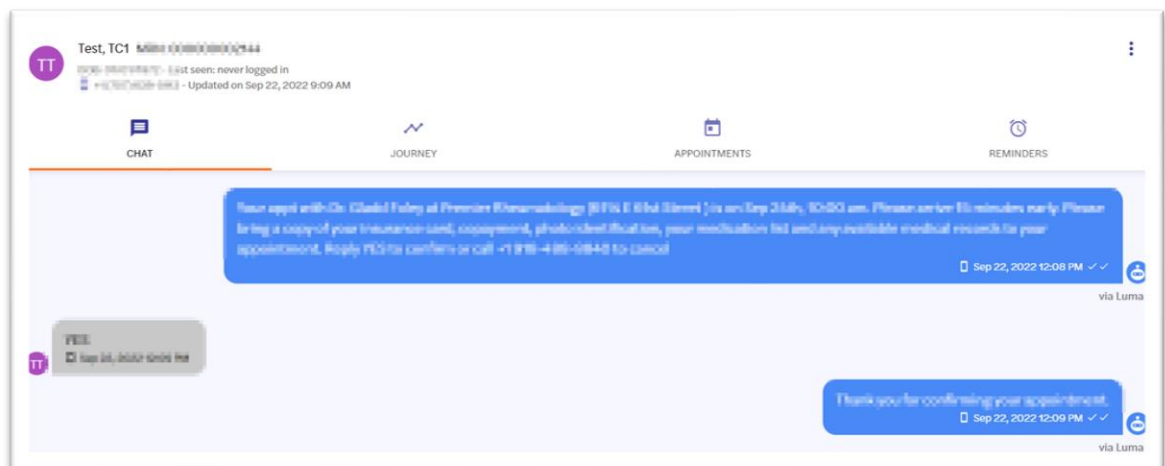


- Select the patient by clicking on their name, which will bring you to the patient's *Chat Window*.



❖ Chat Window

- The patient profile view defaults to the *Chat Window*, which shows all communication that was sent to the patient.

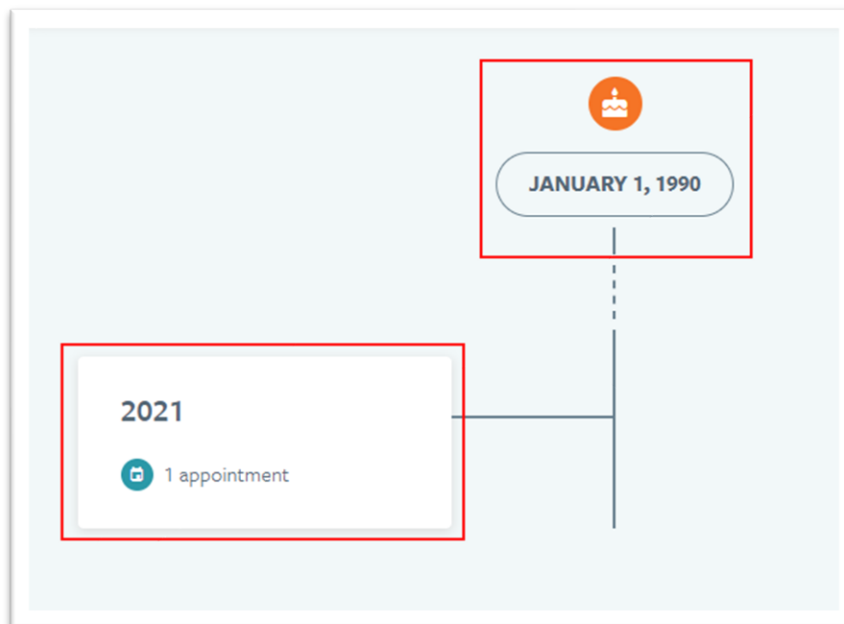




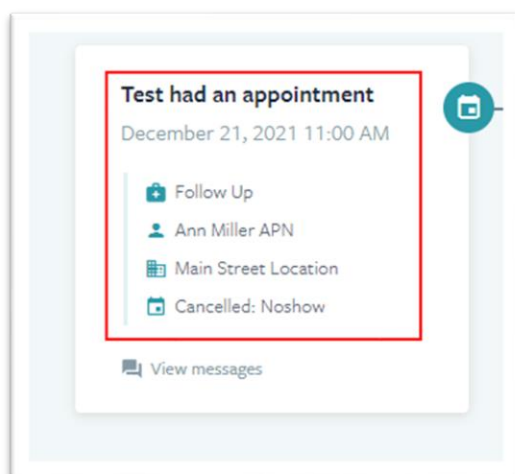
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❖ Journey

- 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*.



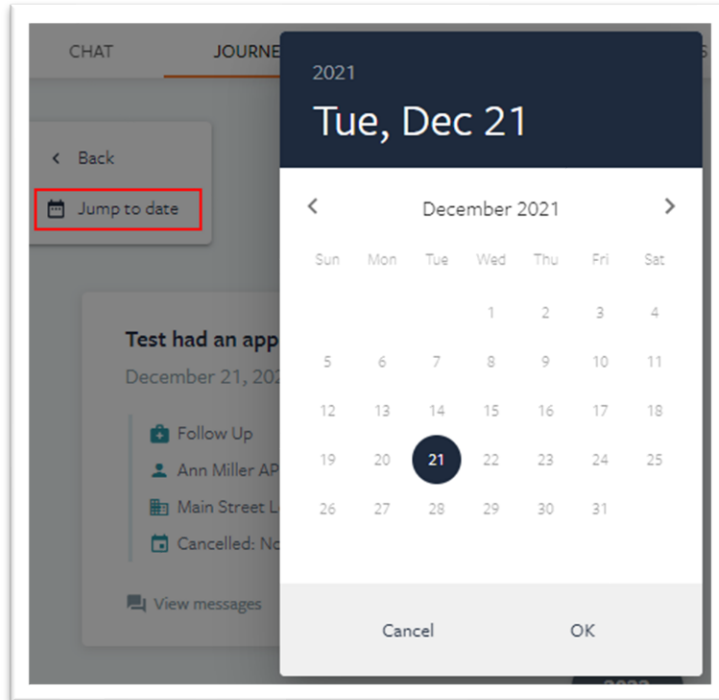
- When you click on the **information box**, it will expand to show detailed information regarding that event, such as the appointment date and time, provider and facility. It will also show the appointment type and status.



- 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 | |



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❖ Reminders

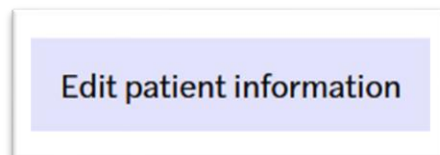
- The *Reminders* tab shows all sent and upcoming automated communications sent to that patient. It details the date and time the automated communications was sent or is scheduled to be sent, as well as the type of automated communication, whether it be for an appointment or custom message. You can also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

| Sent Reminders | | | | | | |
|----------------------------|----------|----------------------|-------------------|-------------------------|--------|--------|
| 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 |

❖ 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

- Select **Edit Patient Information**



Contact Information

First name: Last name:

Date of Birth*:

Contact language:

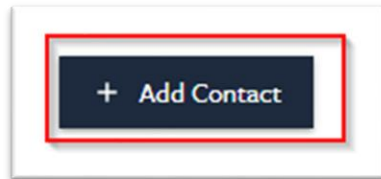
Do not contact

Active?



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- 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**



- 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**



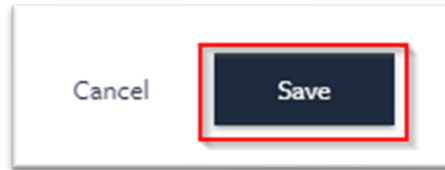
- Patients who wish to not receive communications through Luma can be put in a Do Not Contact status, by selecting the **Do not contact** box.

- This can be changed by unchecking the **Do not contact** box.



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- 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