



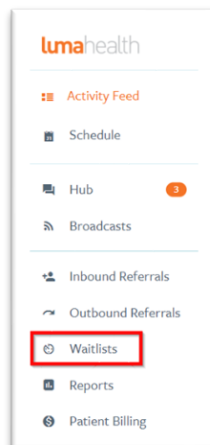
How to: Send Manual Waitlist Offers

Overview

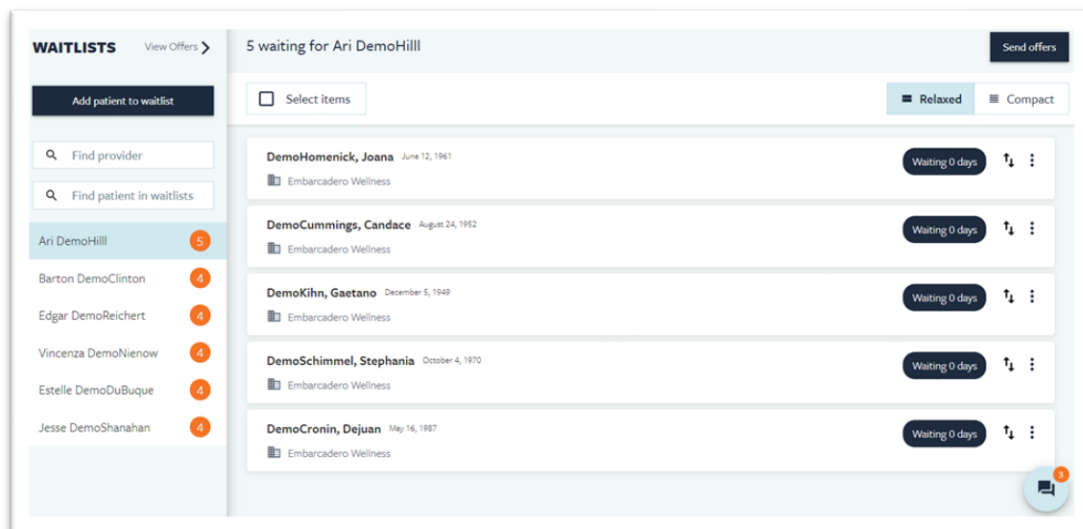
One of the many features included in your Luma Health package is the ability to send out offers manually to patients who have been added to your waitlist. The waitlist typically sends automated appointment offers once Luma has detected a canceled appointment. Luma will look at the provider, facility, appointment type, and duration of that canceled appointment and then look for patients who match these criteria and offer that appointment out to those patients. However, there may be some instances where you'd like to send out a manual offer for an appointment to the waitlist. This could be for appointments that were never filled, or any canceled appointments outside of the search window that Luma uses (typically this window is 14 days unless the practice has chosen to extend this). We will now take a deep dive into how one would manually offer an appointment to patients on your waitlist!

How do I manually send an offer to the waitlist?

- Login to the Luma Health portal.
- Click on **Waitlists** from the left-hand navigation bar.



- Your screen should look similar to this:





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- **Note:** *Manual offers can be sent to patients who have already been added to the waitlist.*
 - If you need a refresher on how to manually add a patient to the waitlist, please feel free to reference our **How to Add Patients to the Waitlist** cheat sheet.
- Click on **Send Offers** in the upper right-hand corner of the waitlists screen.

The screenshot shows the 'WAITLISTS' interface. On the left, there's a sidebar with a search bar and a list of providers. The main area shows a list of patients waiting for 'Rossie DemoGaylord'. Each patient entry includes their name, birth date, and the provider's name. A 'Send offers' button is located in the top right corner of the main area, highlighted with a red box.

- A new window will open that allows you to specify the appointment information for the offer that you are about to send to the waitlist.

The dialog box is titled 'Send appointment offers to waiting patients'. It contains the following fields:

- Date: 03/01/2022
- Time: 04:15 PM
- Provider*: Select (dropdown menu)
- Facility*: Select (dropdown menu)
- Duration*: 15 minutes (dropdown menu)
- Appointment Type: Any (dropdown menu)

At the bottom, there are 'Cancel' and 'Send offers' buttons. The 'Facility*' field is highlighted with a red underline.

- - If you are offering out an existing appointment that was **canceled**, ensure that all appointment information matches the canceled appointment. If not Luma, will not be able to properly schedule the appointment.



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- Information that needs to be entered:
 - Appointment date
 - Time of the appointment
 - Provider
 - Facility
 - Duration
 - Appointment Type
 - ❖ **NOTE:** If left as any, Luma will randomly select an appointment type.
- Patients who qualify for the appointment will begin populating in the right-hand side of this window.
- Continue entering all the required information and then select any patients that you would like to send an appointment offer to by checking the box next to their name.

Send appointment offers to waiting patients [X]

Date
03/04/2022

Time
12:15 PM

Provider*
Grace DemoGusikowski [v]

Facility*
Hayes Valley Health [v]

Duration*
15 minutes [v]

Appointment Type
Chronic Pain Annual [X] [v]

4 waiting patients found

- Lolita DemoBradtko
Any duration
- Vinnie DemoRuecker
Any duration
- Monica DemoVeum
Any duration
- Garnett DemoUpton
Any duration

Cancel [Send offers]

○



How to: Send Manual Waitlist Offers

- Click on **Send Offers**

A screenshot of a software dialog box titled "Send appointment offers to waiting patients". The dialog has a dark header with a close button (X). On the left side, there are several input fields: "Date" (03/04/2022), "Time" (12:15 PM), "Provider*" (Grace DemoGusikowski), "Facility*" (Hayes Valley Health), "Duration*" (15 minutes), and "Appointment Type" (Chronic Pain Annual). On the right side, it says "4 waiting patients found" and lists four patients with checkboxes: Lolita DemoBradtk (checked), Vinnie DemoRuecker (checked), Monica DemoVeum (checked), and Garnett DemoUpton (checked). At the bottom right, there are two buttons: "Cancel" and "Send offers", with the "Send offers" button highlighted by a red rectangle.

- This will start sending the offer out to the selected patient/s.

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