How to: Add Patients to Inbound Referral Loop

Overview

One of the many features included in your Luma Health package is the ability to add patients to your inbound referrals. We will now take a look into how the Luma Inbound Referral Loop works and how you can benefit from this feature!

How do I navigate to Inbound Referrals?

- Login to your Luma Health account.
- Select *Inbound Referrals* from the left navigation bar:
    -
- Your screen should look similar to this:
    -
        - *Note: We will be adding patients one by one, but you can also upload multiple patients at a time as a .csv file by utilizing the "upload referrals" button. If you wish to know more about uploading referral files it is covered in the "How to Use Referral File Upload" cheat sheet.*
- Click **Add Referrals**
    -
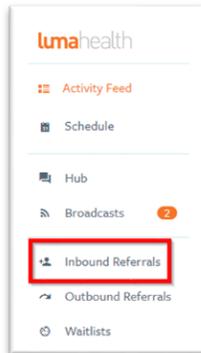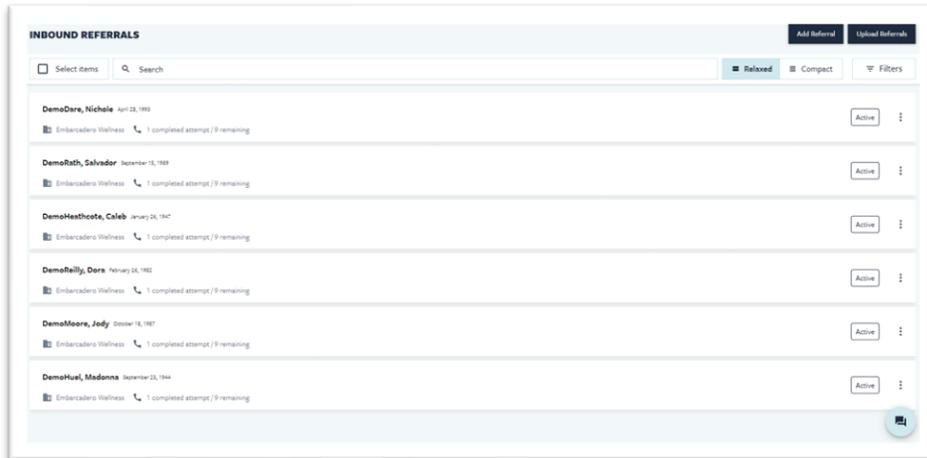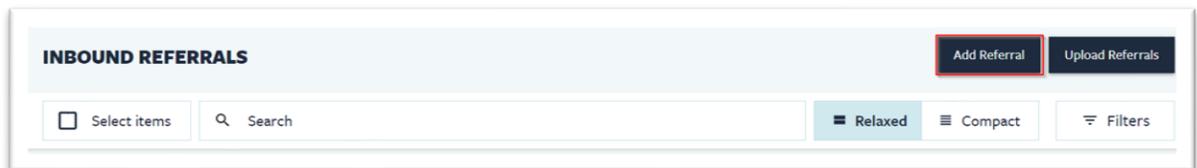
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How do I add a patient to the Inbound Referral Loop?

- Clicking on **Add Referrals** from the Inbound Referral window will prompt you to input information regarding the patient and their appointment.

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- **Required Information:**
  - Patient Name
    - ➢ When typing in a patient name, if the patient is already in your system, you'll see them pop up in the dropdown below, you can just click on that in order to auto-populate the form.
    - ➢ If the patient is not already within Luma, you can manually input all information.

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- ➤
  - o Date of Birth

- ➤
  - o Street Address

- ➤
  - o Contact Method:

- ➤
  - o Facility

- ➤

- o Provider
  - ➢ If you do not know which provider this patient will be seeing, leave this dropdown as "any".

  - ➢
- o Referring Provider
  - ➢ Referring providers that you've previously added to Luma will show up in the dropdown.
  - ➢ If they're not in your Luma system, you can add a new referring provider:

  - ➢

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➢
- ▪ You will need to input the referring providers **Name & at least one Contact Method**. Additionally, you have the option to search the Referring Provider by their NPI number.
- o Referral Reminder Window
  - ➢ Start date defaults to today
  - ➢ End on date automatically populates with enough time to outreach to patient.
  - ➢ You can change this to better fit your specific needs.

➢
- • **Optional Info:**
  - o Appointment Type

➢
  - o ICD-9 & ICD-10

➢

○ Reason for Visit

➤

○ Notes

➤

How do I view the finalized referral?

- Click **save** in order to add this patient to the inbound referral loop.

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- This will return you to the main inbound referral screen where we can view a variety of information about the patient we just added to the referral loop, as well as previous patients added to the referral loop:

○

○ Patient Name & Date of Birth:

➤

o Number of completed // remaining outreach attempts:

INBOUND REFERRALS

Select items   Search

Laci, Test   August 8, 1992

Main Street Location   1 completed attempt / 4 remaining

➢

o Status:

➢ Status can be: **Pending, Active, Scheduled, Cancelled, or Closed**

Laci, Test   August 8, 1992

Main Street Location   1 completed attempt / 4 remaining

Active   ⋮

➢

o Facility:

INBOUND REFERRALS

Select items   Search

Laci, Test   August 8, 1992

Main Street Location   1 completed attempt / 4 remaining

➢

o Notes:

INBOUND REFERRALS

Select items   Search

Laci, Test   August 8, 1992

Main Street Location   1 completed attempt / 4 remaining

Test Notes

➢

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