



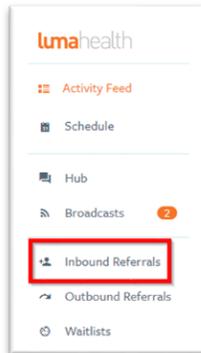
How to: Add Patients to Inbound Referral Loop

Overview

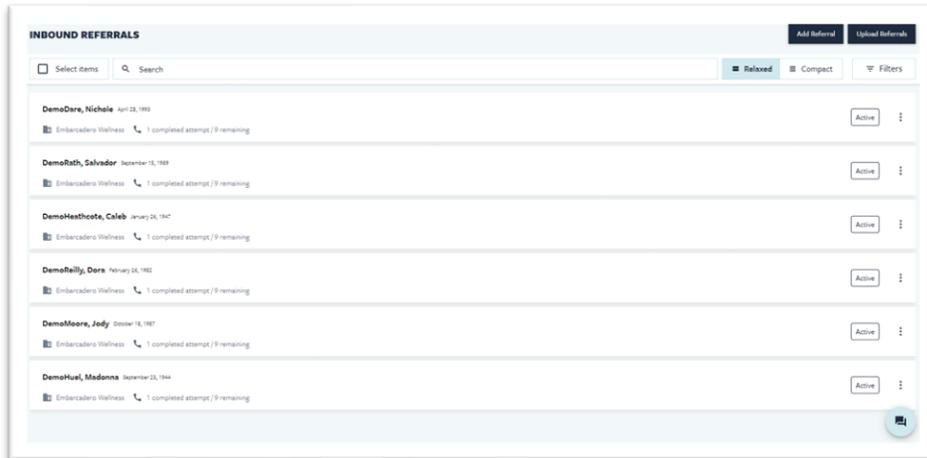
One of the many features included in your Luma Health package is the ability to add patients to your inbound referrals. We will now take a look into how the Luma Inbound Referral Loop works and how you can benefit from this feature!

How do I navigate to Inbound Referrals?

- Login to your Luma Health account.
- Select *Inbound Referrals* from the left navigation bar:

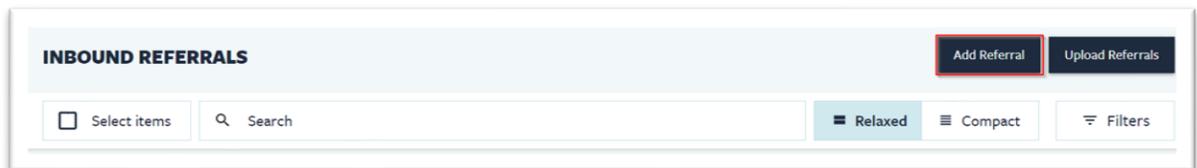


- Your screen should look similar to this:



- *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**





How to: Add Patients to Inbound Referral Loop

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.

INBOUND REFERRAL

Patient Name*

First Name Last Name

New Patient

Date of Birth* mm/dd/yyyy

Contact Language English

Street Address Search for address

Apartment, suite, floor, etc.

Contact* SMS 123-456-7890

Link patient to EHR

Facility* Select

Provider* Any

Appointment Type Select

ICD-9 Search

ICD-10 Type at least 2 characters to search

Referring Provider* Select

Reason for visit

Notes

Referral reminders start on 05/26/2022

Referral reminders end on 06/25/2022

- 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.



How to: Add Patients to Inbound Referral Loop

ADD INBOUND REFERRAL

Patient Name*

Demo Testing - 01/01/1990

Date of Birth*

01/01/1990

- o Date of Birth

ADD INBOUND REFERRAL

Patient Name*

Demo Testing - 01/01/1990

Date of Birth*

01/01/1990

Street Address

- o Street Address

Street Address

101 Europa Dr, Chapel Hill, NC 27517, USA

Apartment, suite, floor, etc.

Suite 200

- o Contact Method:

Contact*

SMS +1 336-555-8330

- o Facility

Facility*

Pacific Heights Healthwell

Embarcadero Wellness

Fremont Outpatient Clinic

Hayes Valley Health

Pacific Heights Healthwell

TSI

Reason for visit



How to: Add Patients to Inbound Referral Loop

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

A screenshot of a dropdown menu titled "Provider*". The search bar contains the text "Any". The dropdown list is open, showing several options: "Any" (highlighted in light blue), "Abbott, Thomas MD", "Dr Anderson", "Ann Miller APN", and "Exam Room 2".

- 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:

A screenshot of a dropdown menu titled "Referring Provider*". The search bar contains the text "Select". The dropdown list is open, showing several options: "+ Add New Referring Provider" (highlighted in light blue), "Bob Smith", "COVID Seniors", "COVID Staff", and "ER Follow Up".



How to: Add Patients to Inbound Referral Loop



- 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.

- 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:**

- Appointment Type



- ICD-9 & ICD-10





How to: Add Patients to Inbound Referral Loop

- Reason for Visit

Reason for visit
X-Ray of Wrist

- Notes

Notes
Allergic to Anesthesia

How do I view the finalized referral?

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

Referral reminders end on
06/25/2022

Cancel Save

- 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:

INBOUND REFERRALS Add Referral Upload Referrals

Select items Search Relaxed Compact Filters

Testing, Demo January 1, 1990
Pacific Heights Healthwell 0 completed attempts / 10 remaining Pending

Allergic to Anesthesia

- Patient Name & Date of Birth:

INBOUND REFERRALS

Select items Search

Laci, Test August 8, 1992

Main Street Location 1 completed attempt / 4 remaining



How to: Add Patients to Inbound Referral Loop

- Number of completed // remaining outreach attempts:

INBOUND REFERRALS

Select items

Laci, Test August 8, 1992

Main Street Location **1 completed attempt / 4 remaining**



- Status:

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

Laci, Test August 8, 1992

Main Street Location

Active



- Facility:

INBOUND REFERRALS

Select items

Laci, Test August 8, 1992

Main Street Location



- Notes:

INBOUND REFERRALS

Select items

Laci, Test August 8, 1992

Main Street Location



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