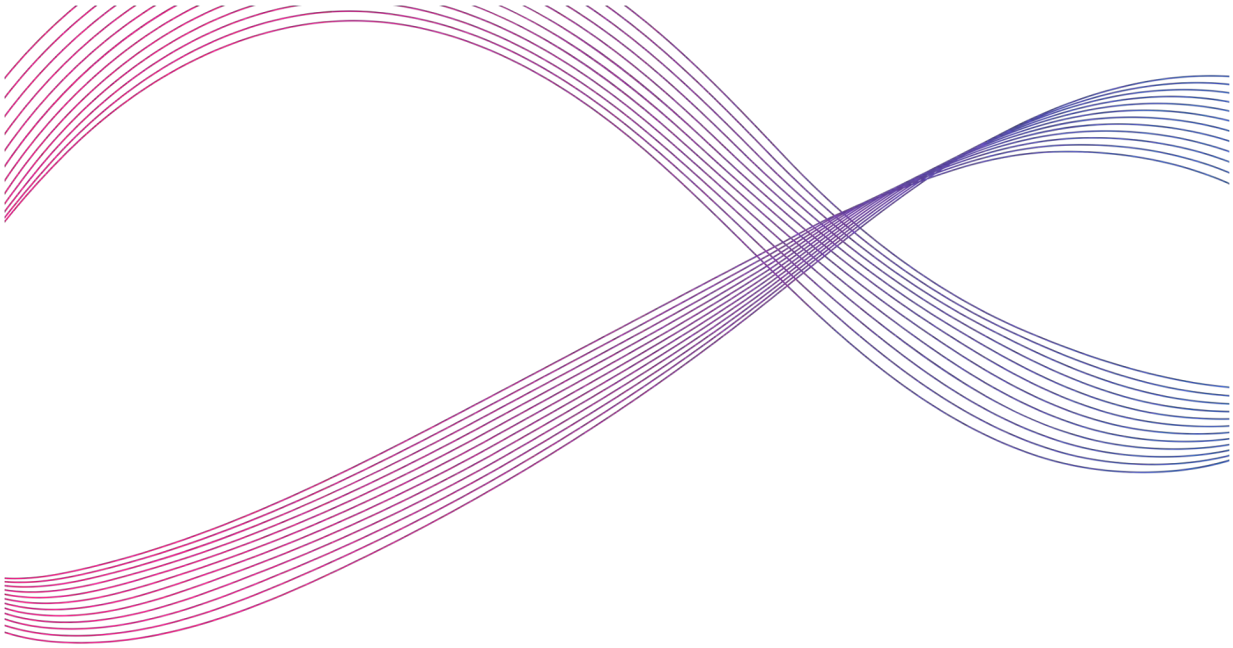


Accounting in Lumeon Conductor 24.2

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Introduction

Conductor provides a comprehensive accounting platform. This includes control of pricing, procedures, and contract rules, so that there is complete financial transparency. Accounting functionality includes managing charges, invoices, and payments. It also enables the creation and management of proforma invoices, discounts, and redeemable credit rules. Conductor also provides integration with the Healthcode clearing service and a payment provider to manage credit card and online payments.

Purpose

The purpose of this document is to:

1. Provide an overview of the accounting functionality within Conductor - see *Accounting (page 5)*.
2. Explain how to create charges and invoices, take and manage payments, create and manage proformas, and use a patient's account statement - see *Payments (page 11)*.
3. Explain how to create and manage discounts - see *Discounts (page 50)*.
4. Explain how to set up and use redeemable credit rules - see *Redeemable credit rules (page 53)*.
5. Describe the financial tools available in Conductor - see *Financial tools (page 56)*.
6. Provide information on integrating with our payment provider - see *Integration with a payment provider (page 91)*.

If your organization uses ***Healthcode*** to reconcile payments against invoices, see ***Healthcode in Lumeon Conductor*** for information on how to set it up and use it.

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Accounting

This section provides an overview of the accounting functionality within Lumeon Conductor.

Products

A product may be an appointment, an ad hoc charge, a prescription, a lab test, a stock item, or any combination of the above.

Products are categorized and nominal codes are assigned to them. For example, if you use Sage accounting software, you can assign Sage codes to a product, or you can use your own product codes.

Products can have unique names which allow them to appear differently on an invoice to how they might appear in a diary, for example. They can also have unique barcodes. This is useful for quick barcode lookups for front of house.

A product also has a VAT property and this informs whether VAT should be charged to companies that are VAT registered. Conductor can determine VAT based on the VAT status of the ultimate billing entity. For example, if a Channel Islands company is billed, Conductor does not add VAT, even if the product would attract VAT in other locations.

Payors

Every time Conductor raises a charge, it must be charged to a payor. There are three types of payor:

- Patients
- Insurance companies
- Companies

Patients

A patient is an individual for whom the clinical service is being delivered. They are the person attending the appointment and are the subject of the clinical episode. In many cases they are also the person paying. A patient can also have a membership, be linked to another person who pays on their behalf, or have their own contract to enable special pricing.

A patient has their own ledger and may make payments against invoices that have been raised. There are a specific set of templates that you can customize for branded patient invoices, statements, and payment receipts.

When a new referral is created, Conductor supports the ad hoc addition of a billing entity or ‘Charge to' destination just for that referral. This is particularly useful in an NHS context where the patient may come under multiple commissioners due to the complex billing relationships some providers have with clinical commissioning groups, trusts, and direct service provision contracts.

A patient may be linked to an insurance company and/or the company where they work.

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Insurance companies

An insurance company links to patients and has a contract of its own. An insurance company may also use EDI (electronic data interchange) or electronic billing to allow invoices to be sent to, and remittances received from, insurers electronically. This can save considerable time and Conductor provides an interface with ***Healthcode***. See ***Healthcode in Lumeon Conductor*** for information on how to set up and use Healthcode functionality.

There are a specific set of templates that you can customize to determine the appearance of insurance company invoices, statements, and payment receipts.

Companies

Companies have a slightly more complex ledger to reflect the customizations that are often needed to deal with them. They can be cross-linked to one another to create a hierarchy of companies. There are also the following options for companies:

- Custom payment terms
- Custom billing contacts
- Choice of invoicing on the day or on account
- Automated rules to roll up invoices on a frequency determined by the contract for that company

Companies also have a specific set of templates that you can customize to determine the appearance of invoices, statements, and payment receipts.

Contracts

Contracts form the foundation of accounting in Conductor. A contract is essentially a price list that links a product to a payor. Each payor has one contract and different payors can share the same contract.

For example, if you have discounted insurer pricing that has been agreed with all insurers, you can share the contract between all of them. When you update this contract, Conductor updates it for all the insurers. However, if you have special terms with one particular insurance company, you can have a dedicated contract for them alone. When you update this contract, it only updates the pricing and rules for this particular insurer.

Contracts are highly configurable and allow prices to be controlled by the following variables:

- Location
- Day
- Hour
- Diary slot
- Gender
- Eligibility level
- Procedure combination

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Alongside pricing, contracts also control cancellation policies, credit card charging, co-payments, booking windows, and other charging rules. Using these rules effectively guarantees that users book the right product at the right time for the right patient at the right price. Equally, it ensures that patients can book online and do the same.

Locations

Location is a core concept of Conductor and each user must be assigned a physical location that they work from. By tying a user to a location, it ensures that when a user takes a payment, it can be reconciled to a particular payment machine, bank run, paying in slip, and so on. Also, it enables Conductor to link invoices to the locations in which they are created.

Although Conductor enables all actions to be carried out from anywhere, depending on permissions and roles, tying a user to a location ensures that all physical aspects of the finance in Conductor, such as cash, cheques, and payments, are properly tracked and accounted for.

Charges

Once a product, including an appointment, is 'instantiated' or used, Conductor creates a charge. A charge is fundamentally different to an invoice because you can change it until the invoice is finalized. By keeping all charges in this pending state, you can check that everything is correct before you raise the invoice. This ensures that there are no errors and that Conductor bills clients with complete accuracy.

Book an appointment and create a charge

When you start to book an appointment or create a referral, Conductor determines who is paying the charge and the contract. Conductor then looks up which products are available for the patient and recommends slots, if using the search engine, that fit the rules of the contract, as well as the specialties and resources required to deliver the appointment.

As soon as the user books the appointment, Conductor creates a charge against the ledger of the payor (patient, company, or insurance company) and this charge remains there until it is invoiced (at the point of attendance), cancelled, or updated.

If the appointment price changes when a user later updates the pricing on the relevant contract, any previously generated charges remain at the price they were when they were created. You can choose to update the price, if appropriate, using the update function but you must do this for each appointment.

Non-appointment charges

You can add further charges to the appointment or patient's account at any time after the booking. You can link these to clinical data so that when a practitioner enters a particular procedure, pathology order, result, form entry, prescription, or other data, Conductor looks up who is paying for the appointment, finds the price for this product using the appropriate contract, and then adds the product as a charge.

If an insurer or a third party is paying for an appointment but their contract prevents that product from being charged, then Conductor gives an option to charge this product to

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the patient. This process ensures that when the patient leaves the appointment, Conductor calculates the charges correctly for the invoice.

If you add a charge to a patient rather than an appointment, the charge does not include the appointment data. This could make correct revenue recognition more difficult. This is not a problem if your organization uses cash accounting but, if not, the appointment date is the revenue recognition date for all patient charges. If, for example, Conductor receives a lab test result, it creates a charge, and entering this against the appointment is key.

This is the default behaviour of Conductor so this should not be a concern for general use. By linking the charge to the appointment, the practitioner and location data are also embedded into the charge so tracking charge behaviour by practitioner is easier.

Invoicing

Invoicing is a very straightforward procedure. When a user checks out a patient, by clicking **L** in the diary. Conductor creates the invoice by taking the charges, whose prices and payor are already known. You can create invoices quickly from the diary or you can manually create an invoice from a patient's account.

If you create an invoice from the diary, this is a self-pay invoice if charges are set for the patient, an insurer invoice if they are set for the insurer, a company invoice if they are set for the company, or a combination of any of these if there is a mix of charges. Conductor follows the rules set for the company so, in some cases, it does nothing as the company may be set to wrap up everything into one bill at the end of the period.

During the manual invoicing process, you can override both the payor and prices, if necessary, but these are then specific to the invoice and the charges remain as they were. Also, if you update the charge later, the invoice is not affected.

You cannot edit invoices. You can only void them, write them off, or create a credit note, if you have the appropriate permissions.

Invoice numbering scheme

Invoices are numbered sequentially and, although invoices can be voided and written off, the invoice number is never reused.

The invoice numbering scheme consists of a set of digits followed by an alphanumeric code. For example:

```
001-AA0001
```

The first 3 digits correspond to the location ID of the invoice, that is where it was raised, and the second part is a numbering scheme that is always 6 characters long. All invoice numbers are consistent in length.

In certain cases, you can implement your own numbering scheme or offset - contact Lumeon Support for more information.

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Accruals and invoice based reporting

When Conductor creates an invoice, the charge that was created when the appointment was booked, and any additional charges, are added to the invoice. Internally, Conductor marks the charge as invoiced and links it to a single invoice. An invoice can contain multiple invoice items and Conductor ensures that, no matter what happens to the appointment or charges, the invoice structure is unaltered.

Conductor links the invoice to all the information about the original date of service as well as the nominal code of the services billed, the location, practitioner, and values, as well as the VAT status as a function of the invoicee. Revenue recognition is achieved by tracking the information against the invoice. This means Conductor has the invoice information as well as the revenue recognition data for easy reporting.

Allocations

Conductor supports two allocation models:

- Line item level allocation
- Invoice level allocation

Neither model supports cross allocation of transactions between payors or invoicees. This means that a patient cannot ever pay an insurance company invoice directly. Instead, the invoice must be credited and reallocated to the patient. There is a **Reissue to patient** function to support this situation.

In both models, allocations may be changed inside and outside of locked periods as the total revenue and debtor position does not change.

Invoice level allocation

Invoice level allocation is usually used by smaller customers. The payment/credit/refund/invoice is allocated against the invoice/refund/credit/payment as a whole and the amount outstanding on each is shown. In this model you cannot see which line items on the invoice are outstanding, only that part of the invoice is outstanding. This model also allows Conductor to accept unallocated payments that can sit on an account.

Line item level allocation

Line item allocation is usually used by larger customers and is slightly more complex to use, as it requires the user to allocate the payment/refund/credit/invoice to a specific line item. Conductor automatically selects items where possible, but it does require the user to select which items are being paid. The advantage of this model is that it is possible to see exactly which items are outstanding and which items have been credited or written off.

This solution does not allow unallocated payments – every transaction must be allocated to be completed. This ensures that there are no open items and it is a more rigorous approach to end user controls.

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Credit notes and voids

Conductor does not allow users to delete invoices without controls. The only way to remove a transaction is to reverse it using a credit note or, within a lock period, void the invoice. Outside of the lock period, the user may choose to write off the invoice or credit it back.

When crediting the invoice, Conductor asks you which lines you want to credit, and then raises a new 'reverse' invoice for that date containing the same line items but with the amount reversed. This ensures that credits are allocated to the right lines on the Profit & Loss statement. You can cross allocate between lines, if required, by raising a new credit note with charges on it which are then allocated against the original line items. This is useful for customers who want to keep credits on different lines in their accounts.

VAT

Conductor enables individual client companies to be VAT registered, either at a full rate or at a zero rate. This, in combination with a VAT rateable product, results in Conductor adding VAT at the appropriate rate to an invoice.

In the case of diagnostic imaging, the presence of a report automatically removes the VAT component to ensure that it is treated appropriately as a medical service.

There are three VAT rates available in Conductor; T0, T1, and T9. These values are configured in the database and can be set to 4 decimal places.

The default VAT rate is set when creating an appointment type. You can override this when you prepare an invoice. Once you have created an invoice, it displays the charge with VAT included.

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Payments

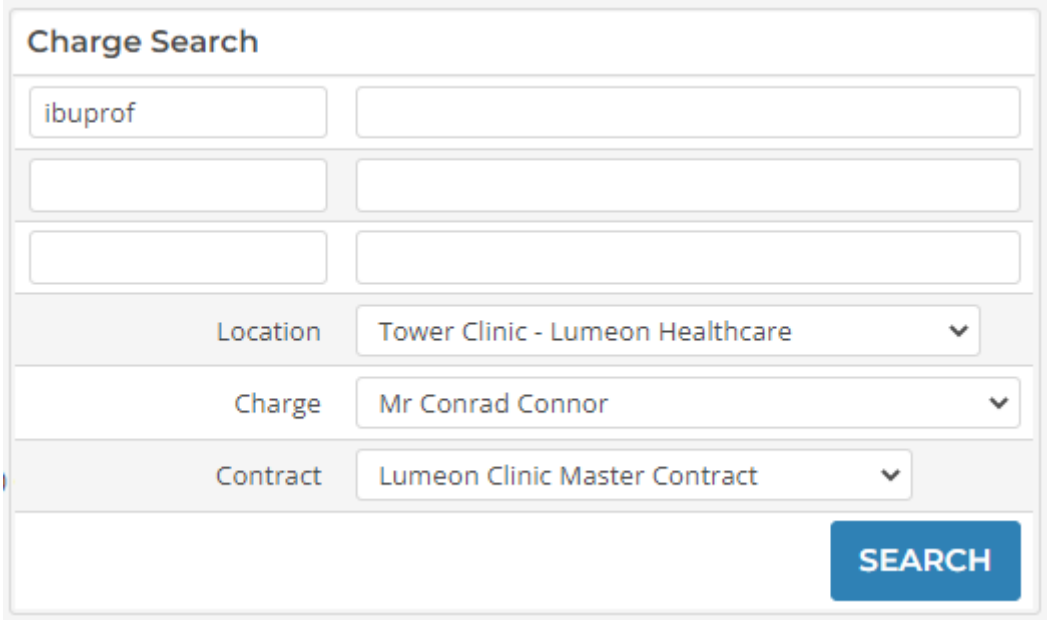
This section provides a step-by-step guide to making payments within Conductor.

Charges

Associate a charge to a patient

To add a non-appointment charge to a patient account:

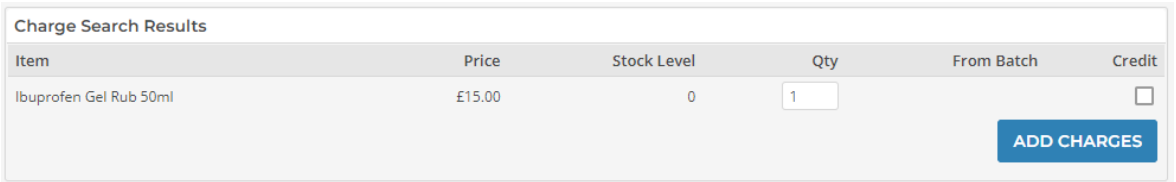
1. Either search for the required patient and click **Charges** in the **Patient** menu, or click **P** in the diary.
2. Scroll down to the **Charge Search** form.



3. Ensure that the correct payor appears in the **Charge** field.
4. Type the first few letters of the name of the required product into one of the fields in the **Charge Search** form.

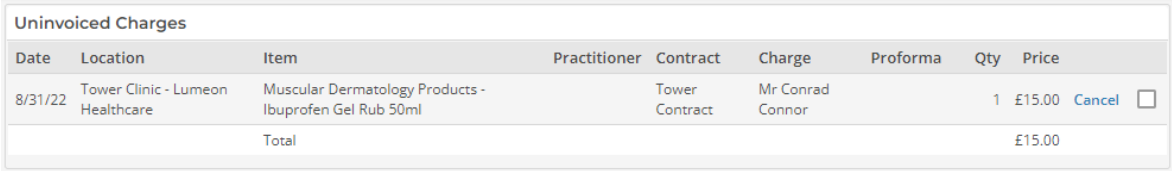
   Alternatively, use a barcode scanner to enter a barcode in the **Barcode** field.

   Click **Search**. The product appears in the **Charge Search Results** table.



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5. Enter the quantity required and click **Add charges**. This adds the product to the list of **Uninvoiced Charges**.



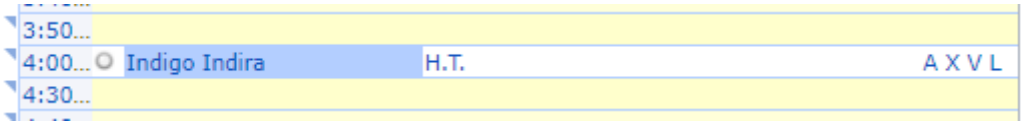
Uninvoiced Charges

Date	Location	Item	Practitioner	Contract	Charge	Proforma	Qty	Price	
8/31/22	Tower Clinic - Lumeon Healthcare	Muscular Dermatology Products - Ibuprofen Gel Rub 50ml		Tower Contract	Mr Conrad Connor		1	£15.00	Cancel
		Total						£15.00	

Associate a charge to an appointment

To associate a non-appointment charge to an appointment:

1. Click on the patient's name in the diary to go straight to the appointment details for the patient.



2. Alternatively, search for the required patient using **Patient Search** in the top menu bar.

   Then:

   - Either, select the required appointment in the table of future appointments or the last appointment.



Future Appointments

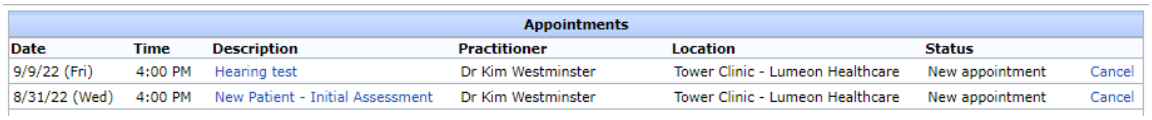
Date	Time	Description	Practitioner	Location	Status	P
9/9/22 (Fri)	4:00 PM	Hearing test	Dr Kim Westminster	Tower Clinic - Lumeon Healthcare	New appointment	Cancel



Last Appointment

Date	Time	Description	Practitioner	Location	Status	
8/31/22 (Wed)	4:00 PM	New Patient - Initial Assessment	Dr Kim Westminster	Tower Clinic - Lumeon Healthcare	New appointment	Cancel

   - Or, select **Appointments & Classes** in the **Patient** menu and click on the appointment that you want to add the charge to.



Appointments

Date	Time	Description	Practitioner	Location	Status	
9/9/22 (Fri)	4:00 PM	Hearing test	Dr Kim Westminster	Tower Clinic - Lumeon Healthcare	New appointment	Cancel
8/31/22 (Wed)	4:00 PM	New Patient - Initial Assessment	Dr Kim Westminster	Tower Clinic - Lumeon Healthcare	New appointment	Cancel

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3. Type the first few letters of the name of the required product into one of the fields in the **Charge Search** form.

   Alternatively, use a barcode scanner to enter a barcode in the **Barcode** field.

   If the appointment is being charged to an insurance company or company but the non-appointment charge should be charged to the patient, select **Charge to Patient**.

Appointment Charges

Item	Qty	Price	Invoice Ref	Charge
Appointments - New Patient - Initial Assessment	1	£180.00		Mrs Indigo Indira
Total		**180.00**		

Charge Search

barcode

ibuprof

Charge to Patient

Search

4. Click **Search**. The product appears in the **Charge Search Results** table.

Charge Search Results

Item	Price	Stock Level	Qty	From Batch	Credit
Ibuprofen Gel Rub 50ml	£15.00	0	1		

Add charges

5. Enter the quantity required and click **Add charges**. This adds the product to the list of **Appointment Charges**.

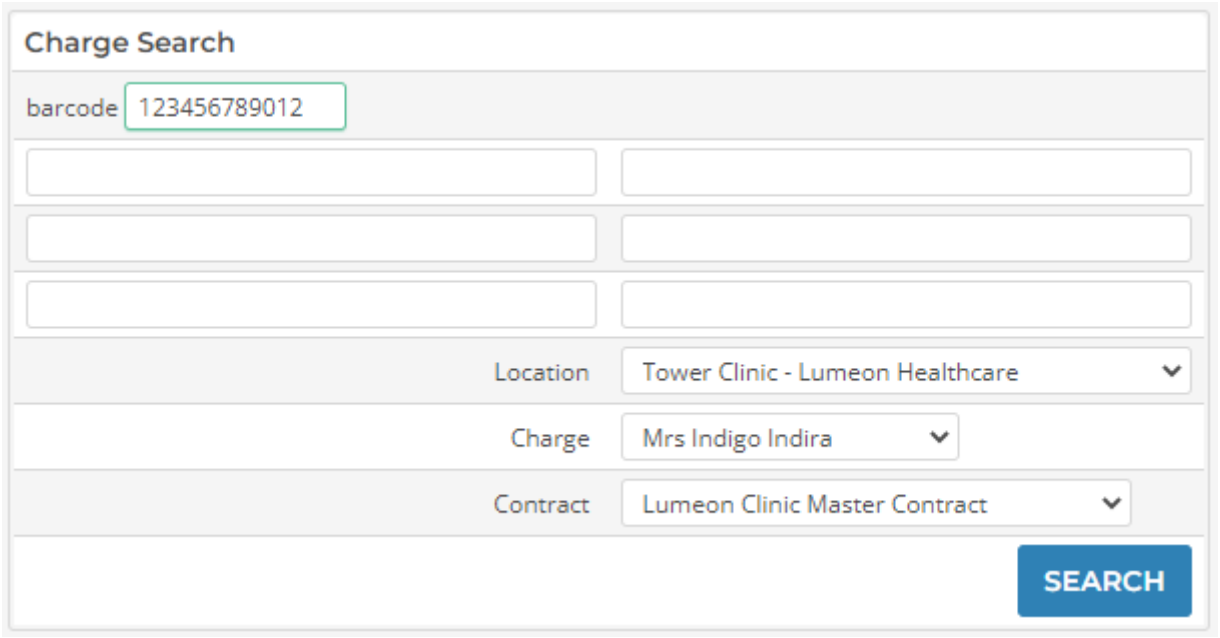
Appointment Charges

Item	Qty	Price	Invoice Ref	Charge
Appointments - New Patient - Initial Assessment	1	£180.00		Mrs Indigo Indira
Muscular Dermatology Products - Ibuprofen Gel Rub 50ml	1	£15.00		Mrs Indigo Indira
Total		**195.00**		

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Use a barcode scanner

If a product has been added to Conductor with a barcode number, you can use a barcode scanner to insert charges for that product. Scan the product barcode into the **Barcode** field in the **Charge Search** form and click **Search**. This adds the charge to the list of patient or appointment charges.



Cancel a charge

To cancel a charge, click **Cancel** next to the required charge in the **Uninvoiced Charges** table.



In the case of an appointment charge, this does not cancel the appointment, just the charge. If you cancel a stock item, although the charge is cancelled, the stock level is not reversed.

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Prepare and create invoices

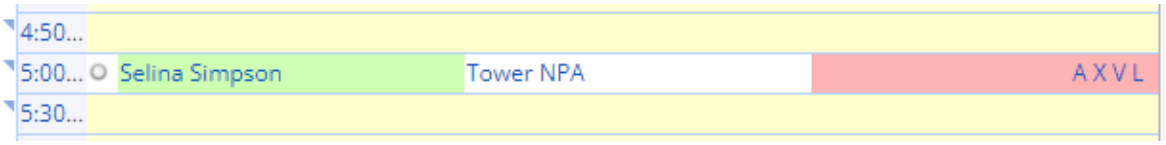
You can take a quick payment for an appointment or a class, or you can manually create an invoice for a patient. Quick payments enable you to record a payment taken from a patient immediately after an appointment or class.

Quick payment for an appointment or class

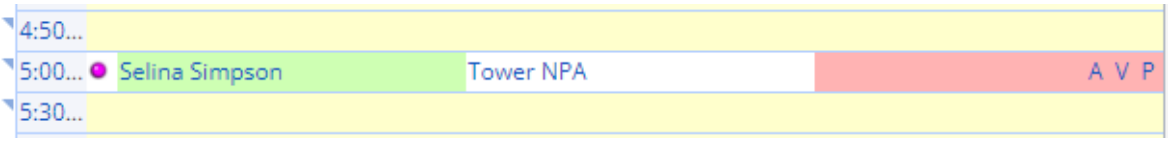
The quick payment method enables users to take payment and allocate it to an invoice directly from the diary view. For example, to quickly take a payment after a patient has finished an appointment or class

To take a quick payment:

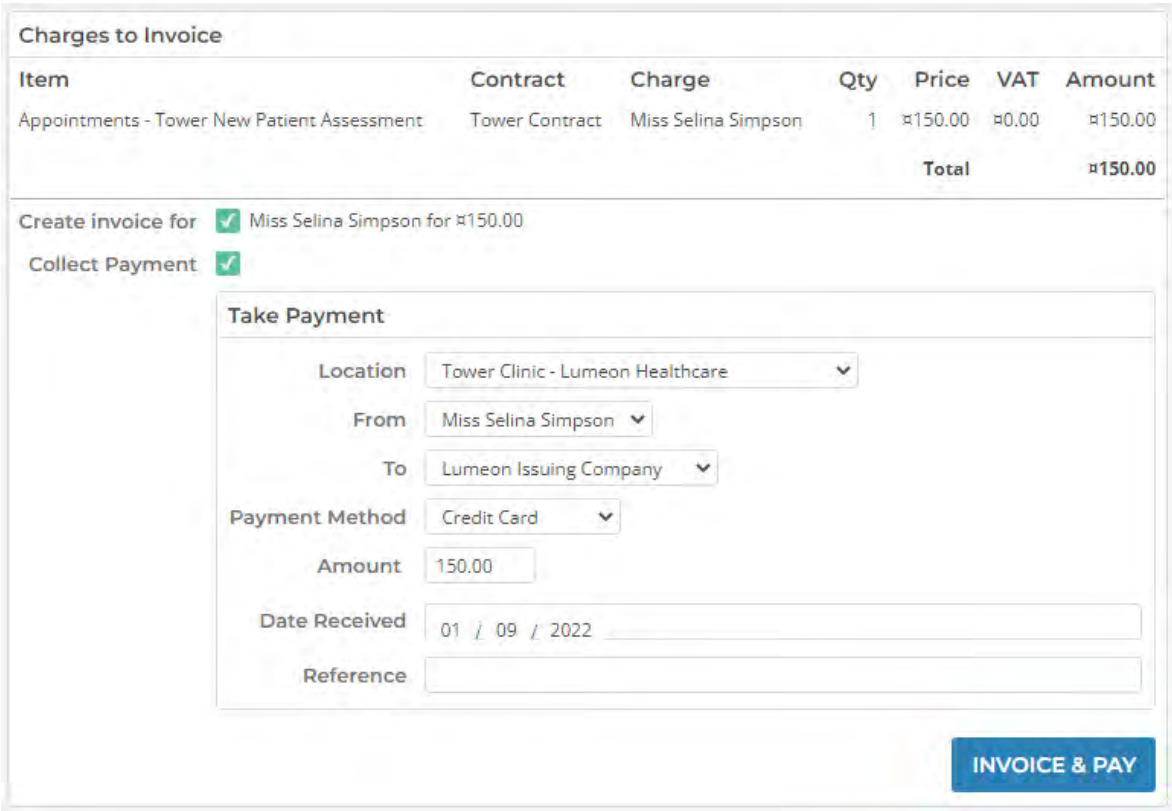
1. Click **L** in the patient's appointment in the diary.



   This generates a **P** button.



2. Click **P** to display the charges to invoice and a **Take Payment** form.



3. Check that the payee (patient, employer, or insurance company), payment method, and other details, are correct, and change if necessary.

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4. Enter a reference, if required.

5. Click **Invoice & pay**. This automatically allocates the payment to the invoice.

Manually create an invoice

If you do not use the quick payment method, you must prepare invoices and allocate them manually.

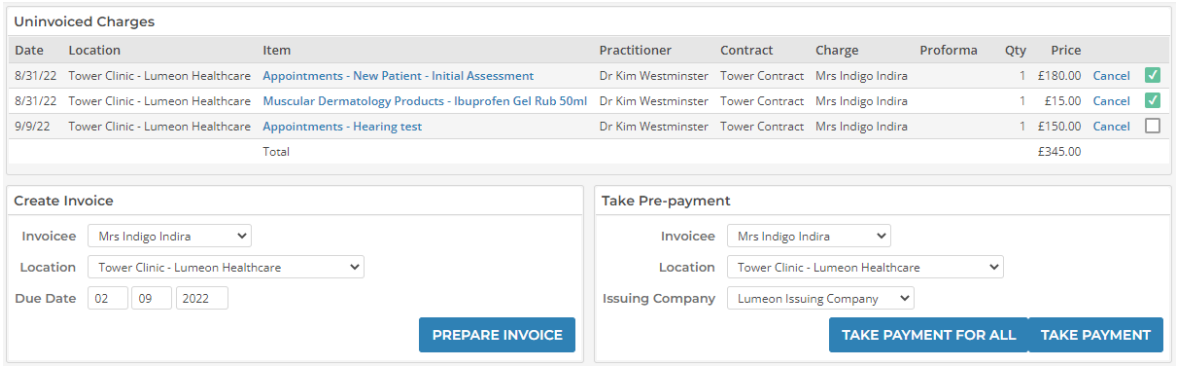
To prepare an invoice for a patient:

1. Search for the required patient using the **Patient Search** option in the top menu bar.

2. Click **Charges** in the **Patient** menu.

3. Use the **Charge Search** form to add additional charges if required - see *Associate a charge to a patient (page 11)*.

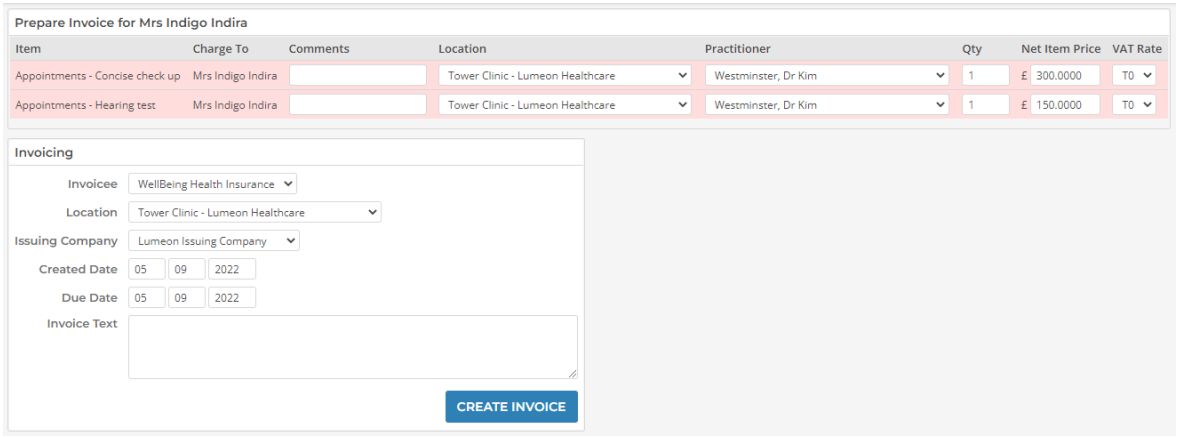
4. Select the checkboxes of the charges that you want to invoice in the **Uninvoiced Charges** table.



5. Ensure the invoicee, location, and due date are correct, and change if necessary.

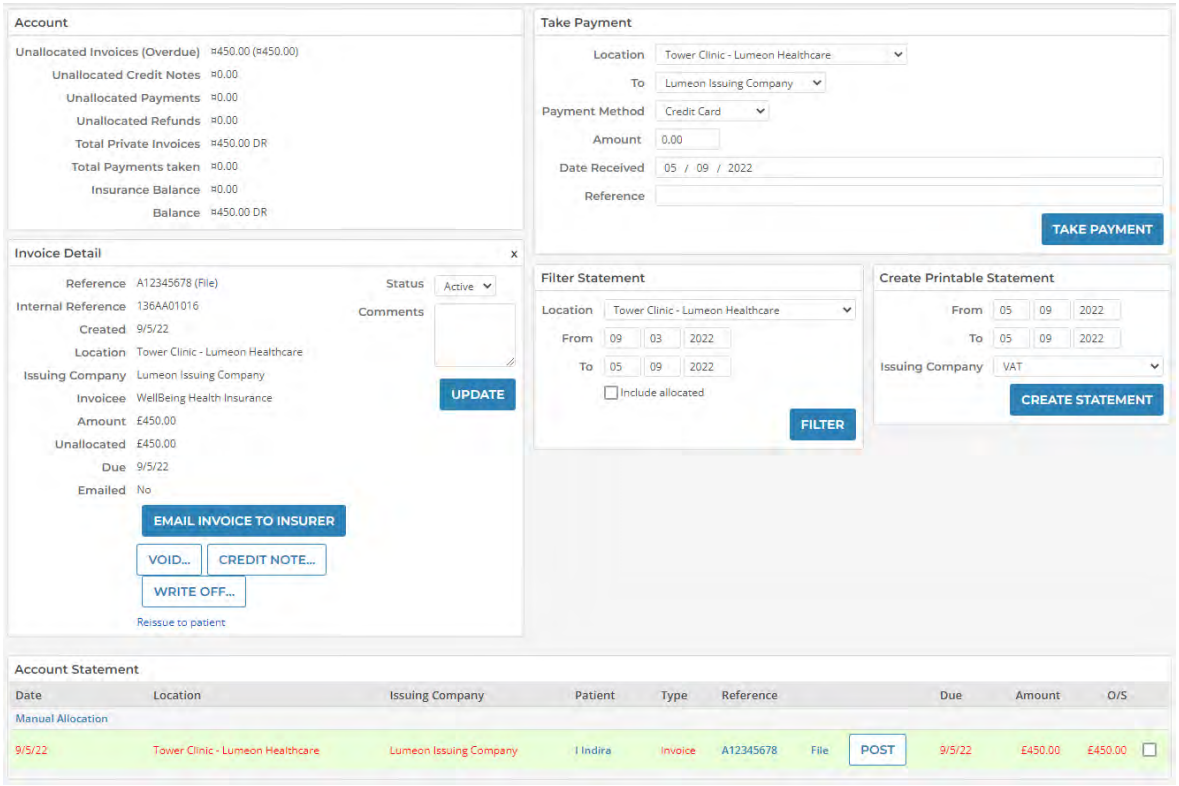
6. Click **Prepare invoice**. The details of the invoice and the **Invoicing** form are displayed.

7. Ensure that all the invoice details, including the VAT rate, are correct. If you enter a comment, it appears on the invoice in brackets after the description of the charge.



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8. Click **Create invoice**. The **Invoices & Payments** page for the patient is displayed.



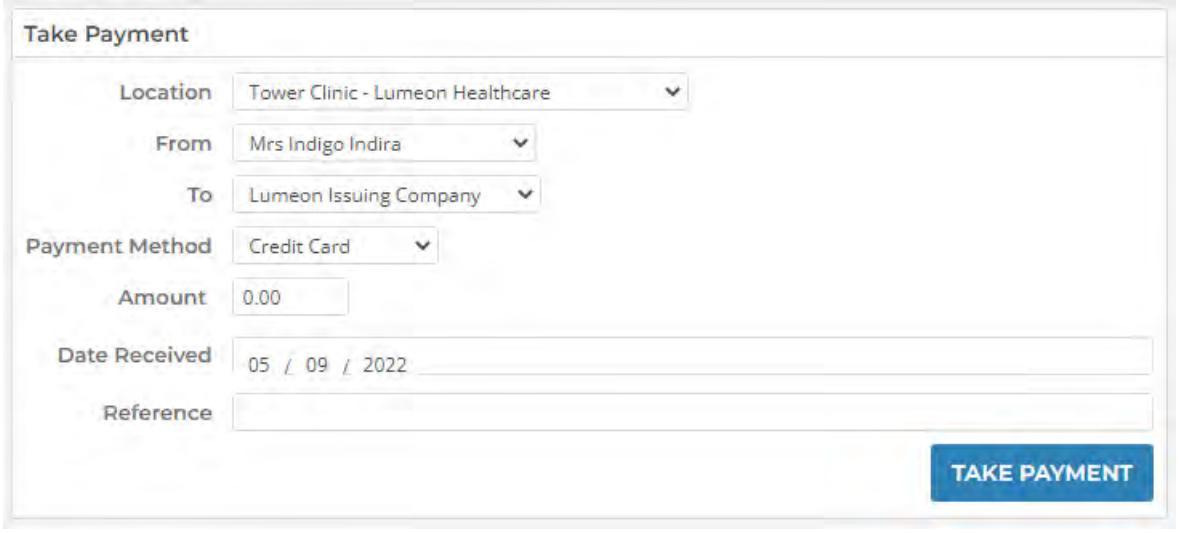
Take payment

You can take a payment at any time from a patient, employer, or insurance company.

Take payment from a patient

To take a payment from a patient:

1. Search for the patient using the **Search Patient** option in the top menu bar.
2. Select **Invoices & Payments** in the **Patient** menu to display the **Take Payment** form.



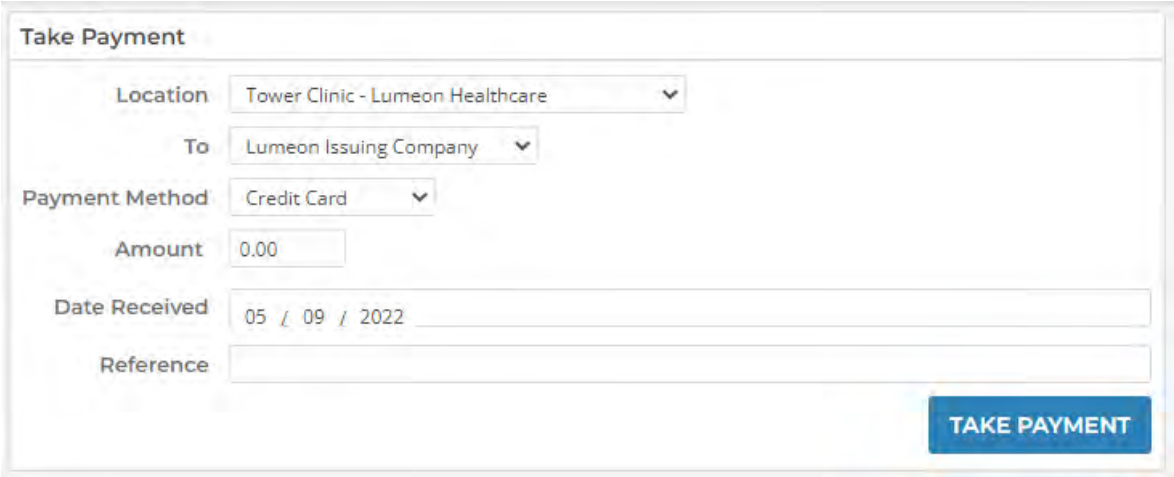
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3. Ensure the **From** field, the payment method, and other payment details are correct.
4. Enter the amount. Add a reference if required.
5. Click **Take payment**. The payment appears in the **Account Statement** table. You can now allocate the payment to an invoice.

Take payment from an employer

To take a payment from an employer:

1. Select **Company Accounts** in the **Accounting** menu.
2. Scroll down to find the company in the **Companies** table on the right.
3. When you can see the company, click **Invoicing & Payments** in the same line. This displays the **Invoices & Payments** page for the company which includes the **Take Payment** form.



4. Ensure the payment method and other payment details are correct.
5. Enter the amount. Add a reference if required.
6. Click **Take payment**. The payment appears in the **Account Statement** table. You can now allocate the payment to an invoice.

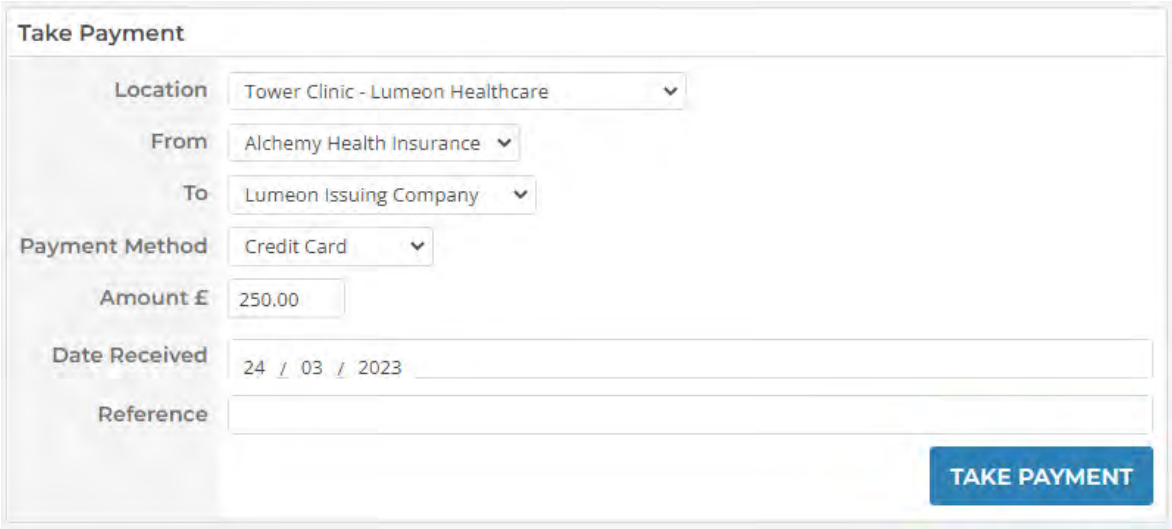
Take payment from an insurance company

To take a payment from an insurance company:

1. Select **Company Accounts** in the **Accounting** menu.
2. Start typing any part of the insurance company name in the **Search** field in the **Insurance Companies** section on the left. Alternatively, find the insurance company in the **Insurance Companies** table.

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3. When you can see the insurance company, click **Invoicing & Payments** in the same line to display the **Take Payment** form. This displays the **Invoices & Payments** page for the insurance company which includes the **Take Payment** form.



4. Ensure the payment method and other payment details are correct.

5. Enter the amount. Add a reference if required.

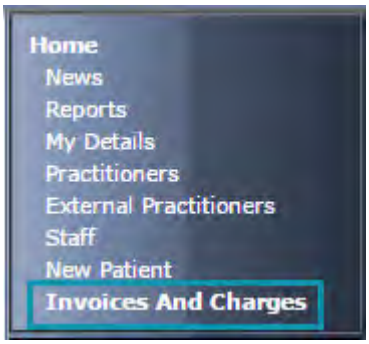
6. Click **Take payment**. The payment appears in the **Account Statement** table. You can now allocate the payment to an invoice.

Take payment in practitioner view

There is a core configuration setting that enables practitioners to take payments from patients. If you want to use this feature, contact Lumeon Support.

To take a payment in the practitioner view:

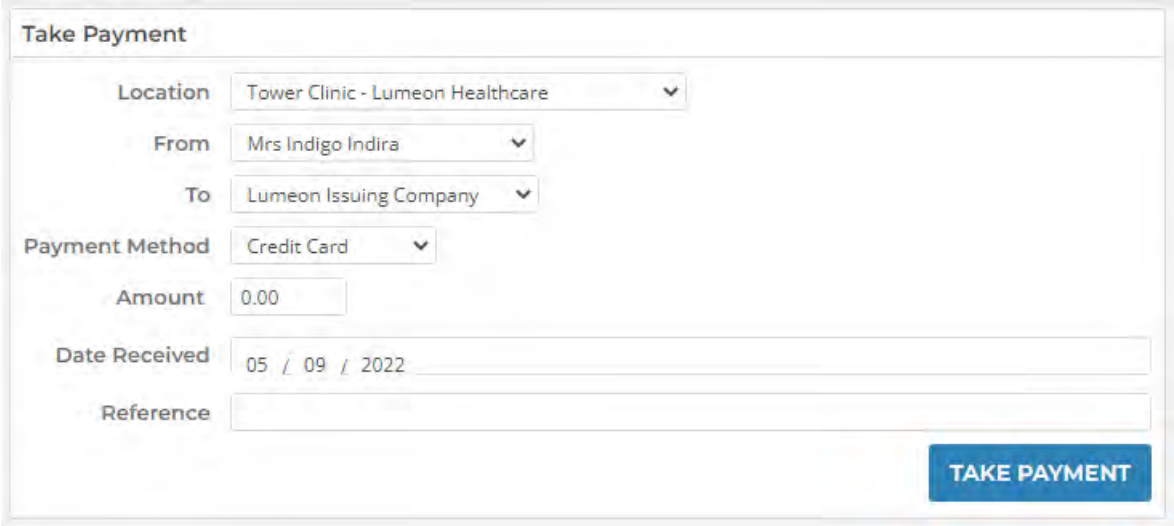
1. Select **Invoices and Charges** in the **Home** menu in the practitioner view. This displays a list of all uninvoiced charges.



2. Select a charge and click **Create Invoice**. The charge appears in the table of **Invoices**.

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3. Click **Take Payment** to display the **Take Payment** form.



4. Ensure the **From** field, the payment method, and other payment details are correct.

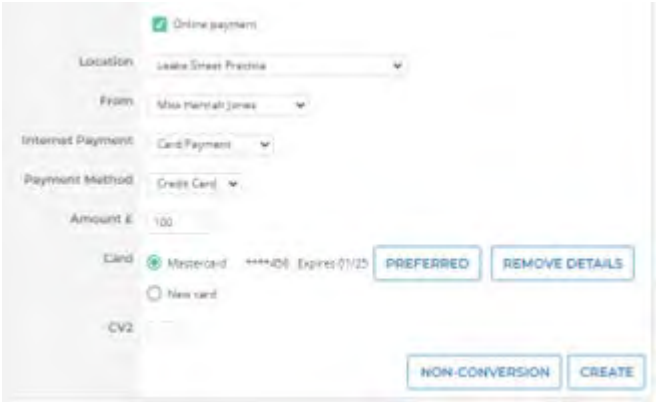
5. Enter the amount. Add a reference if required.

6. Click **Take payment**. The payment appears in the **Account Statement** table. You can now allocate the payment to an invoice.



Take a payment while booking an appointment

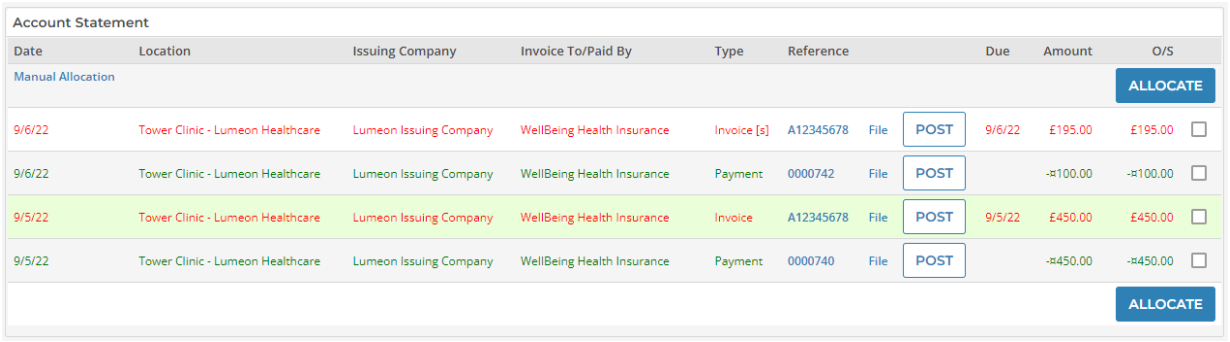
You can take a payment while the patient is booking the appointment. When filling out the appointment booking page, select **Online Payment**, enter the card details and click **Create**.



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Account statement

When you create an invoice or make a payment, it appears on the **Account Statement** for the patient, employer, or insurance company. Unpaid invoices display in red.

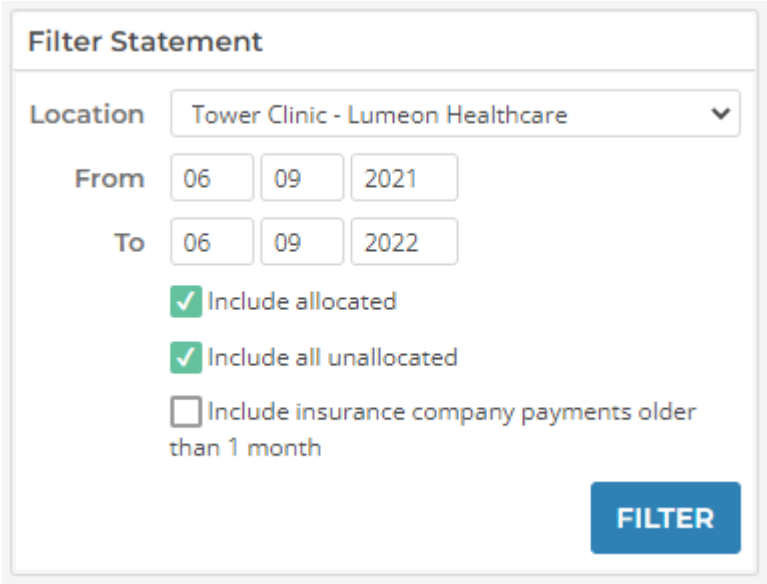


You can use the account statement to:

- Allocate payments to invoices
- Create invoices
- Create printable statements

Filter statement

You can filter the account statement using the **Filter Statement** form.



You can view invoices and payments for:

- All locations or a single location
- A range of dates

You can also display or hide:

- Allocated invoices

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- Unallocated invoices - patients only
- Insurance company payments over one month old - patients only

To filter the account statement, enter the required location or set to **All**, enter the required dates, select or clear the appropriate check boxes, and click **Filter**.

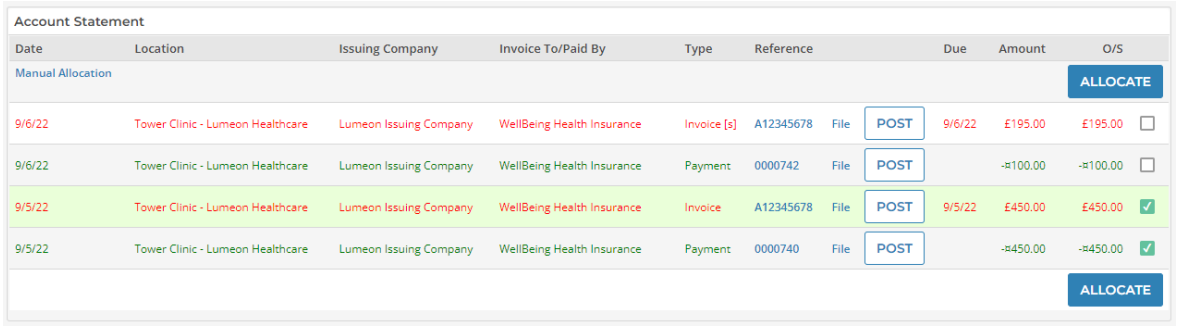
Make allocations

You can allocate a payment to an invoice automatically or manually.

Allocate automatically

To allocate a payment to an invoice:

1. Ensure that the text in the top left hand corner of the **Account Statement** table says **Manual Allocation**. If it says **Auto Allocation**, click it to change to automatic allocation mode.
2. Select the invoices and payments that you want to allocate.



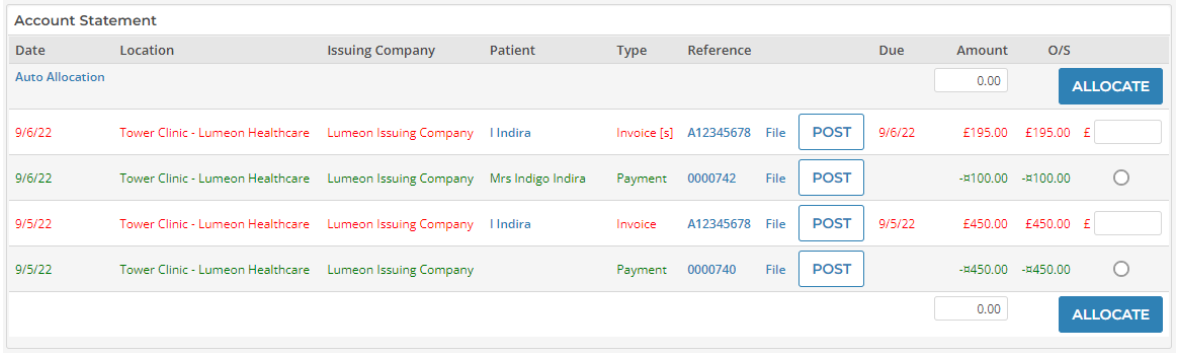
3. Click **Allocate**. Conductor automatically assigns the payments to the invoices.

   Once you have allocated one or more payments to cover the total amount of an invoice, the invoice and payment(s) no longer display in the list, unless you have selected the **Include allocated** check box in the **Filter Statement** form.

Allocate manually

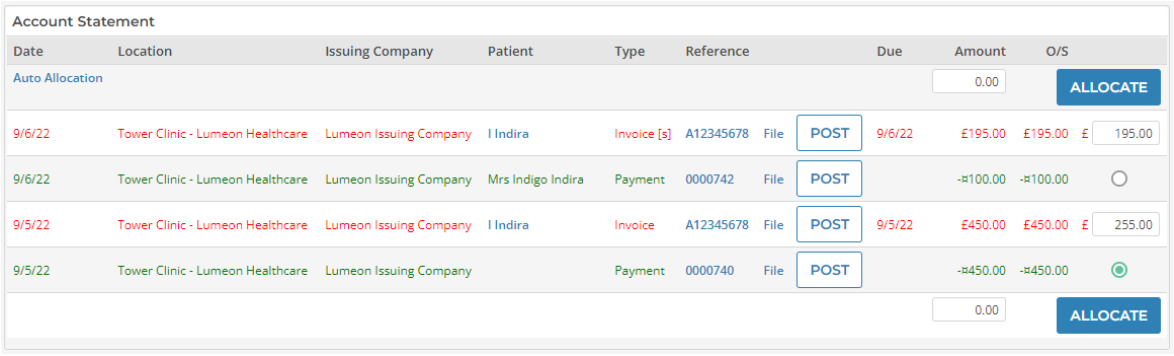
You can manually allocate payments to invoices, for example, if you want to allocate a payment to more than one invoice. To do this:

1. Click **Manual Allocation** in the top left hand corner of the **Account Statement** table. Radio buttons appear in the payment rows and amount fields display in the invoice rows.



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2. Select a payment by clicking its radio button and enter amounts in the invoices that you want to allocate the payment to. The amount to be allocated displays in the **Amount** next to the **Allocate** button.



   As you enter amounts against the invoices, the **Amount** next to the **Allocate** button decreases.

3. Click **Allocate** to allocate the payment amounts to the invoices as you have indicated.

   Once you have allocated one or more payments to cover the total amount of an invoice, the invoice and payment(s) no longer display in the list, unless you have selected the **Include allocated** check box in the **Filter Statement** form.

After allocation

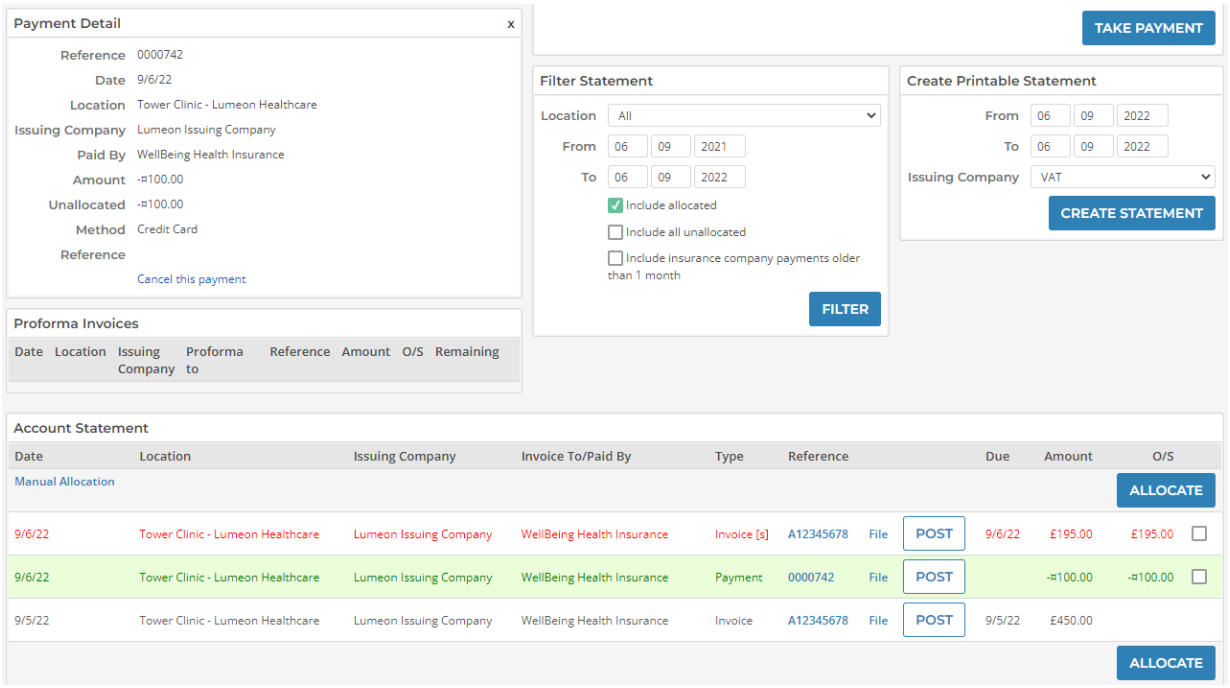
If you do not allocate the full invoice amount, the invoice remains red because there is still money outstanding on it. The figure on the right in the account statement displays what is still owed.

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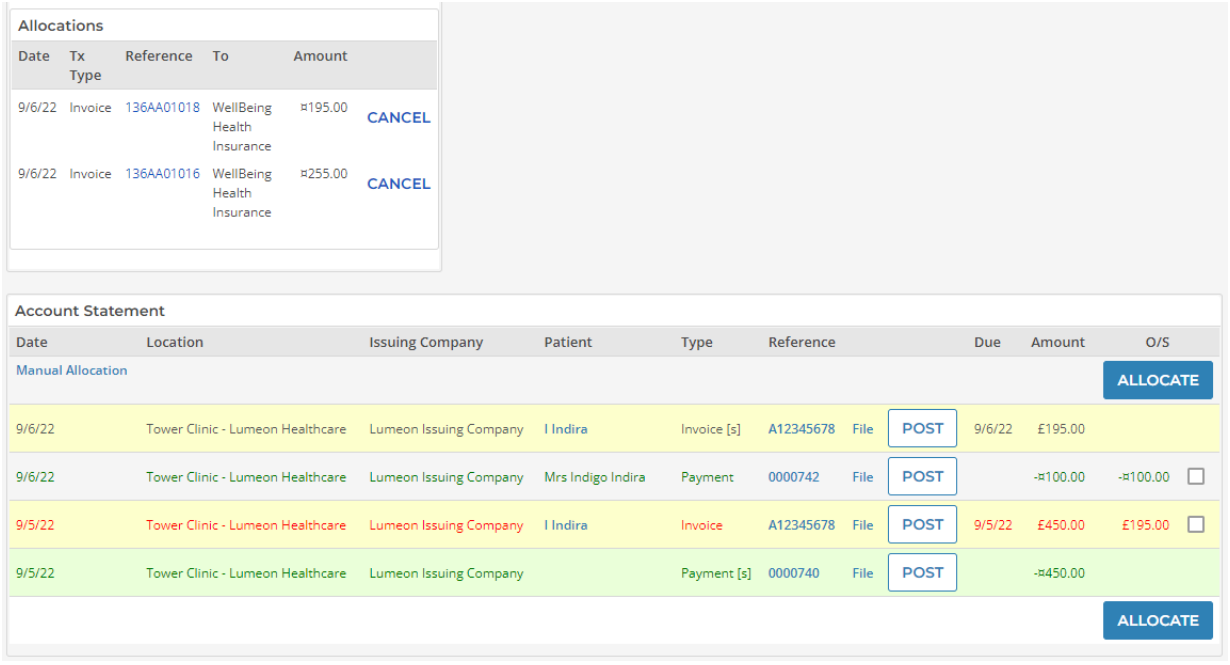
Cancel a payment

If you have made a mistake, for example, you allocated a part-payment to the wrong invoice or you took an incorrect payment, you can undo the error.

You can cancel a payment if you have not allocated it to an invoice. To do this, click the payment reference number and then click **Cancel this payment** in the **Payment Detail** form.

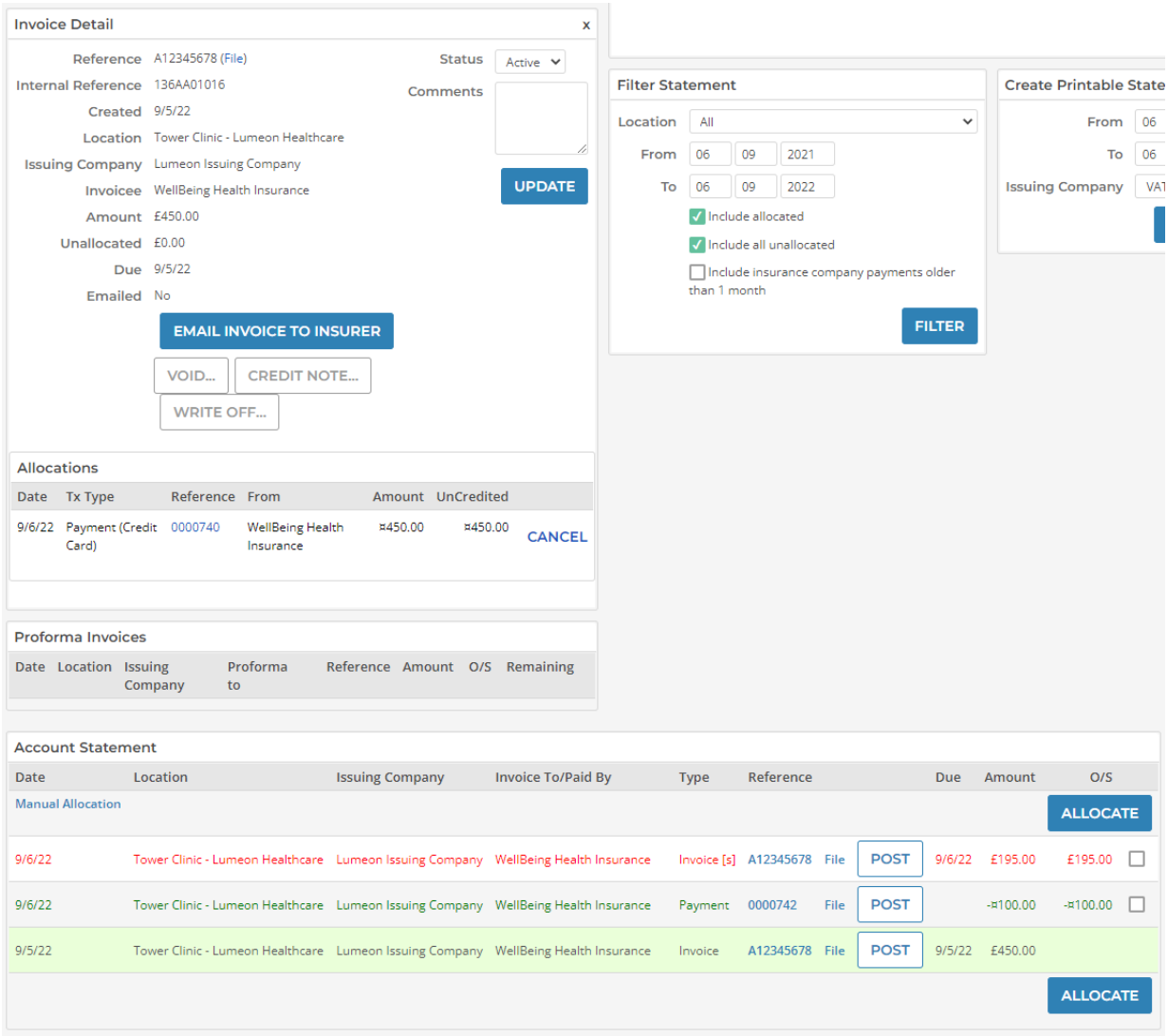


If you can see the payment because it has been partly allocated or allocated against more than one invoice, click the payment reference number and an **Allocations** form appears above. Click **Cancel** to cancel the allocation(s). You can then cancel the payment if necessary.



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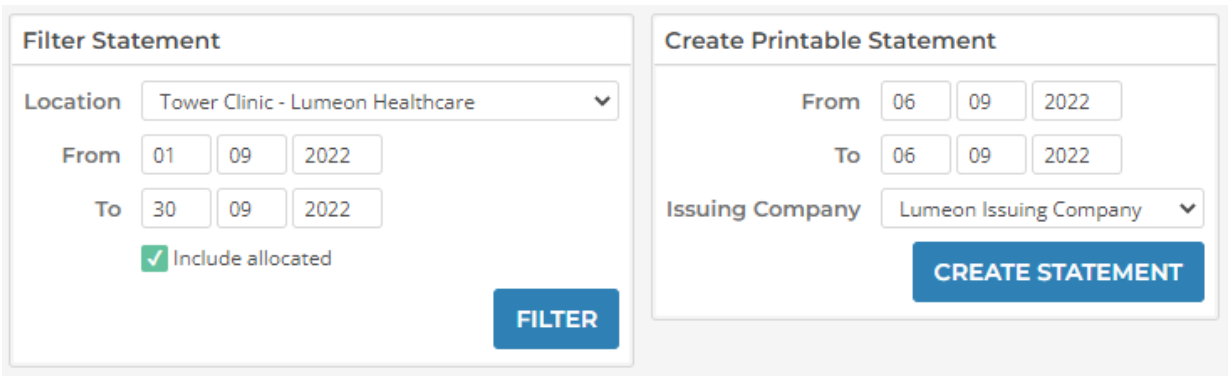
If you cannot see a payment because it has been fully allocated to an invoice, click the invoice reference number and the **Invoice Details** and an **Allocations** form appear above. Click **Cancel** to cancel the allocation. You can then cancel the payment if necessary.



Create statement

You can download a PDF of an account statement.

Use the **Filter Statement** field to ensure that the account statement includes the correct invoices and payments - see *Filter statement (page 21)*.

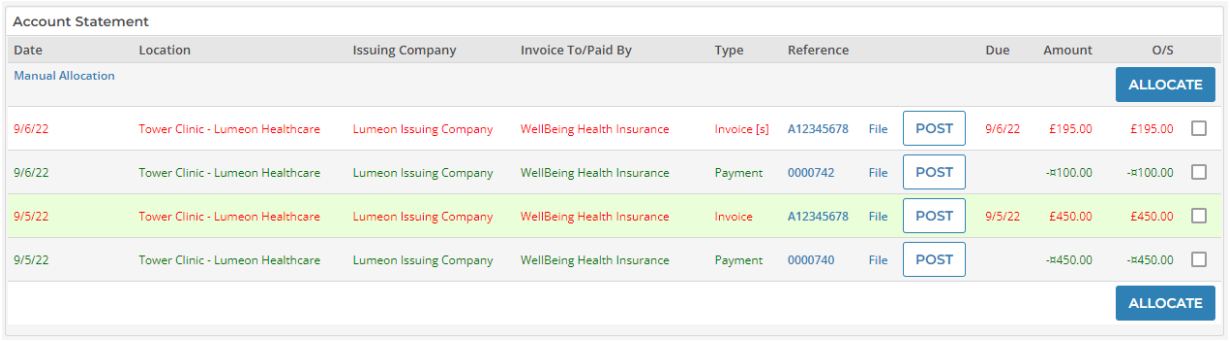


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Then click **Create Statement** in the **Create Printable Statement** form. You can save the account statement to your computer for printing later.

Print or send an invoice or payment receipt

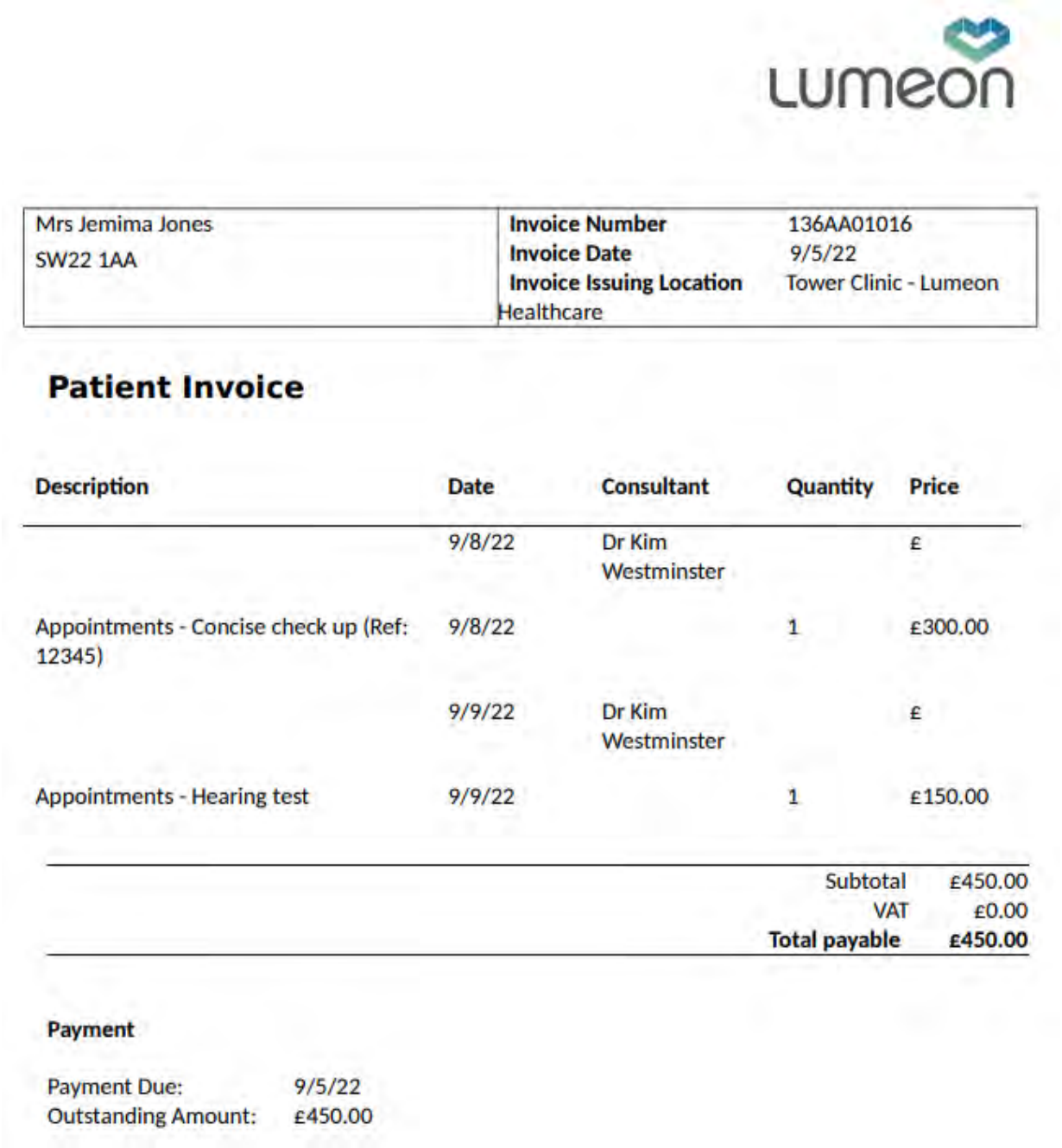
In the account statement, you can create a PDF for an invoice or payment receipt for printing later. Alternatively, if your organization has an interface to a mailing system, you can arrange to post the invoice or payment.



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Create PDF of invoice or receipt

To create a PDF of an invoice or payment receipt, click **File** in the line of the invoice or payment in the **Account Statement** table. You can save the PDF on your computer for viewing and printing later.



Mrs Jemima Jones
SW22 1AA

Invoice Number 136AA01016
Invoice Date 9/5/22
Invoice Issuing Location Tower Clinic - Lumeon Healthcare

Patient Invoice

Description	Date	Consultant	Quantity	Price
	9/8/22	Dr Kim Westminster		£
Appointments - Concise check up (Ref: 12345)	9/8/22		1	£300.00
	9/9/22	Dr Kim Westminster		£
Appointments - Hearing test	9/9/22		1	£150.00

Subtotal	£450.00
VAT	£0.00
Total payable	**£450.00**

Payment

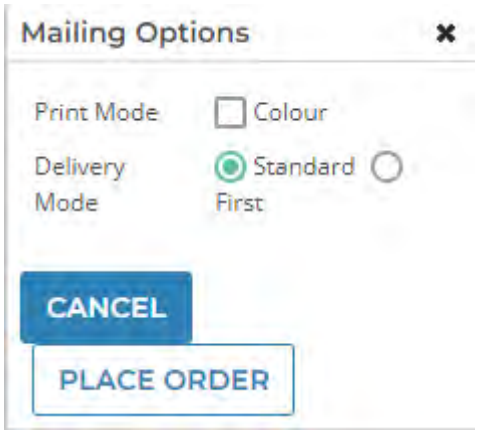
Payment Due: 9/5/22
Outstanding Amount: £450.00

If your product is configured to produce Microsoft Word documents, you can create the invoice as a Word document. This enables you to edit the invoice before sending it.

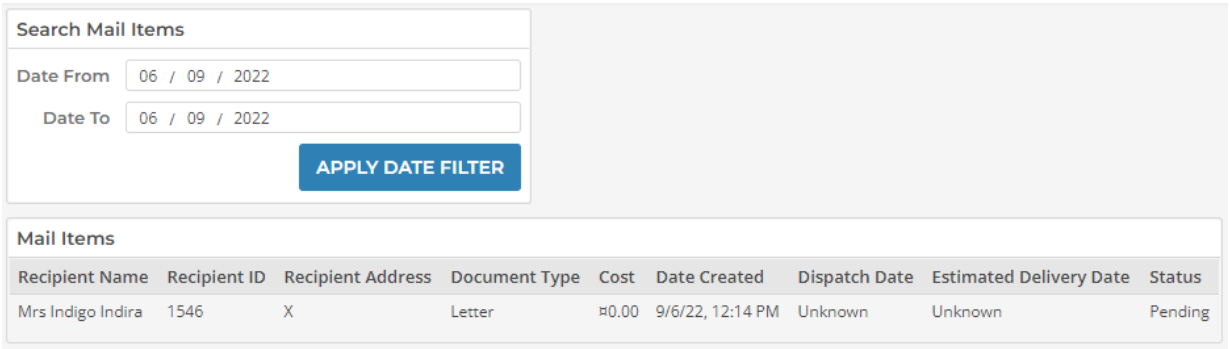
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Mail invoice or receipt

If your organization has an interface to a mailing system, click **Post** if you want to send the invoice or payment receipt. This displays the **Mailing Options** window. Select if you want the invoice in colour and whether you want standard or first class delivery. Click **Place order** to send the invoice to the mailing system.



To view the status of mail items, select **Post Room** in the **Communication** menu.

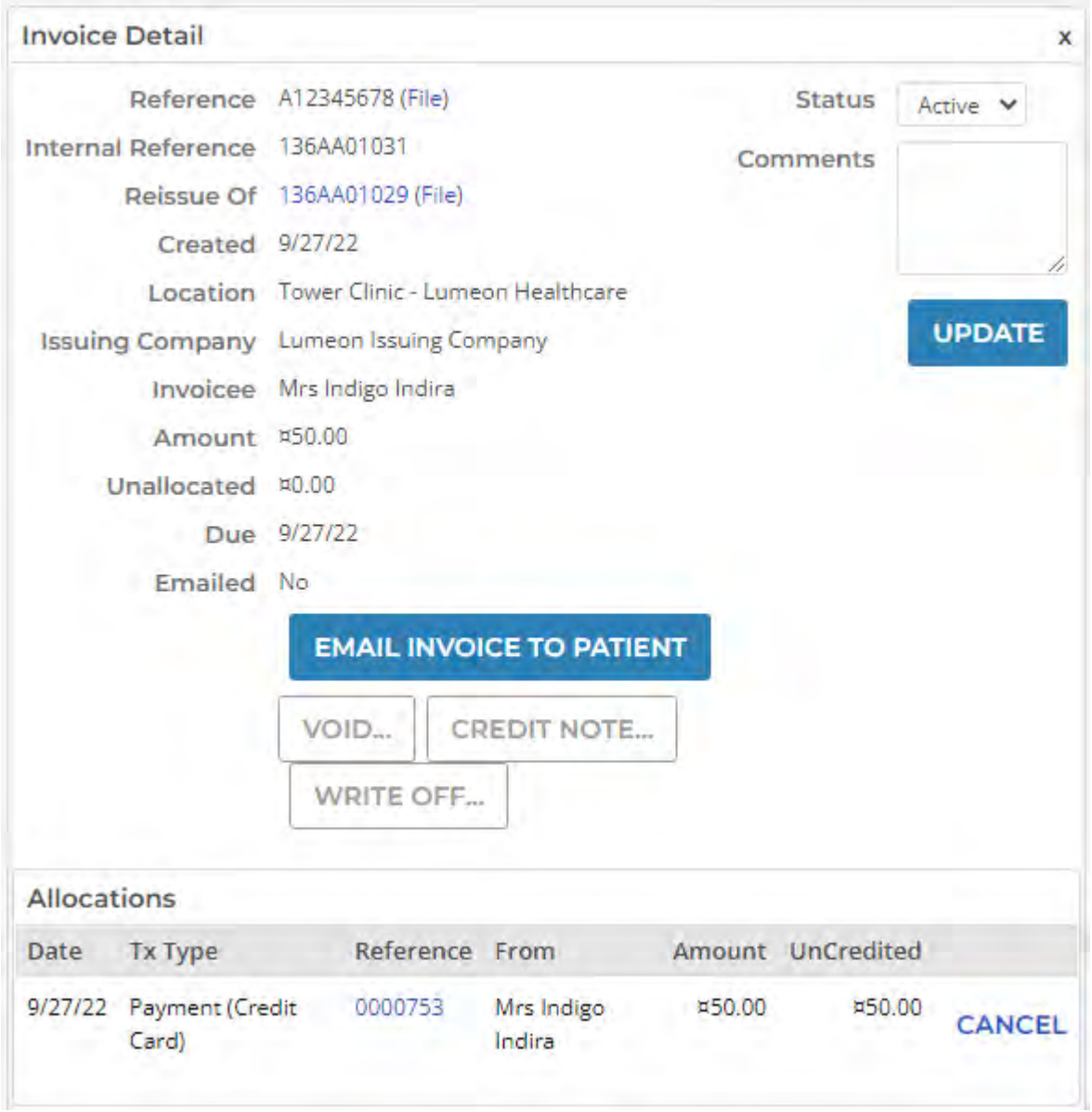


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Email invoice

You can email an invoice to a patient. To do this:

1. Click the invoice number on the account statement to display the **Invoice Detail** form.



2. Click **Email Invoice to Patient**.

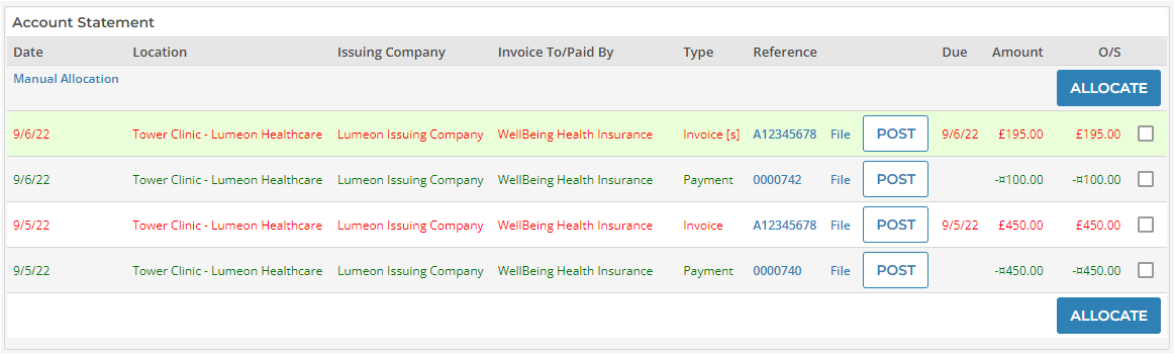
Reissue an invoice

To reissue an employer or insurance company invoice to a patient in full or in part:

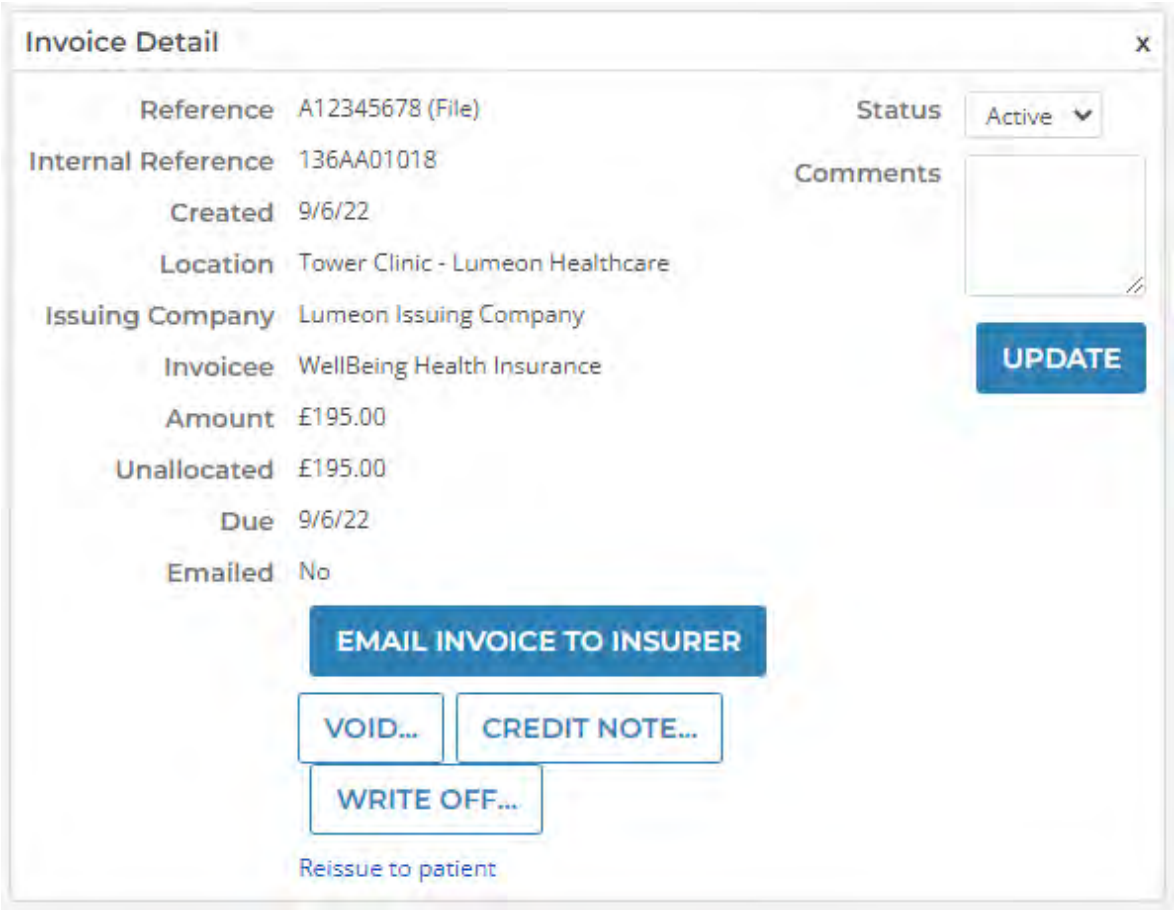
1. Search for the patient using the **Search Patient** option in the top menu bar.
2. Select **Invoices & Payments** in the **Patient** menu.

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3. Click the reference number of the invoice that you want to reissue in the **Account Statement** table. The invoice details are displayed in the **Invoice Detail** form.

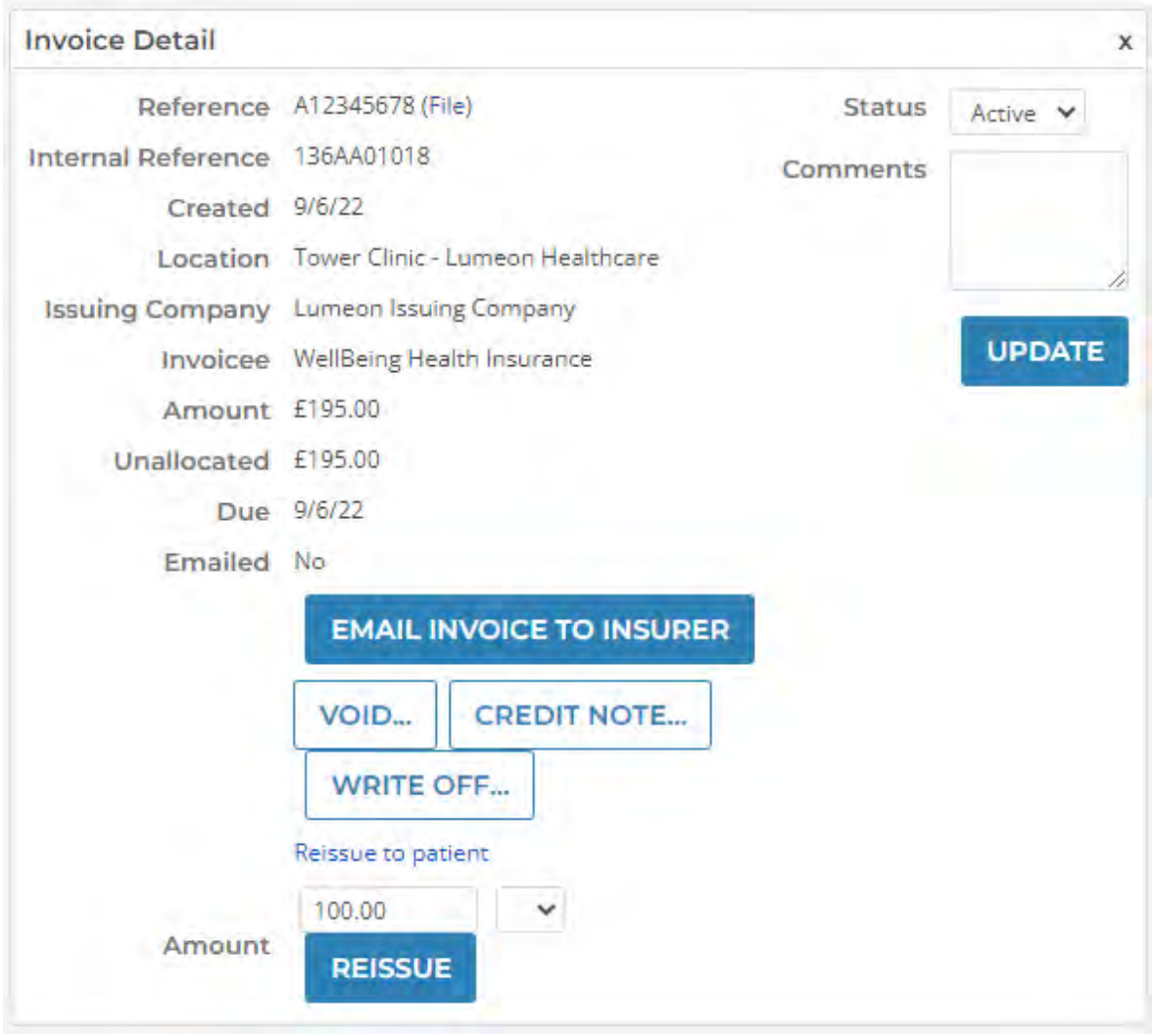


4. Click **Reissue to patient** in the **Invoice Detail** form.



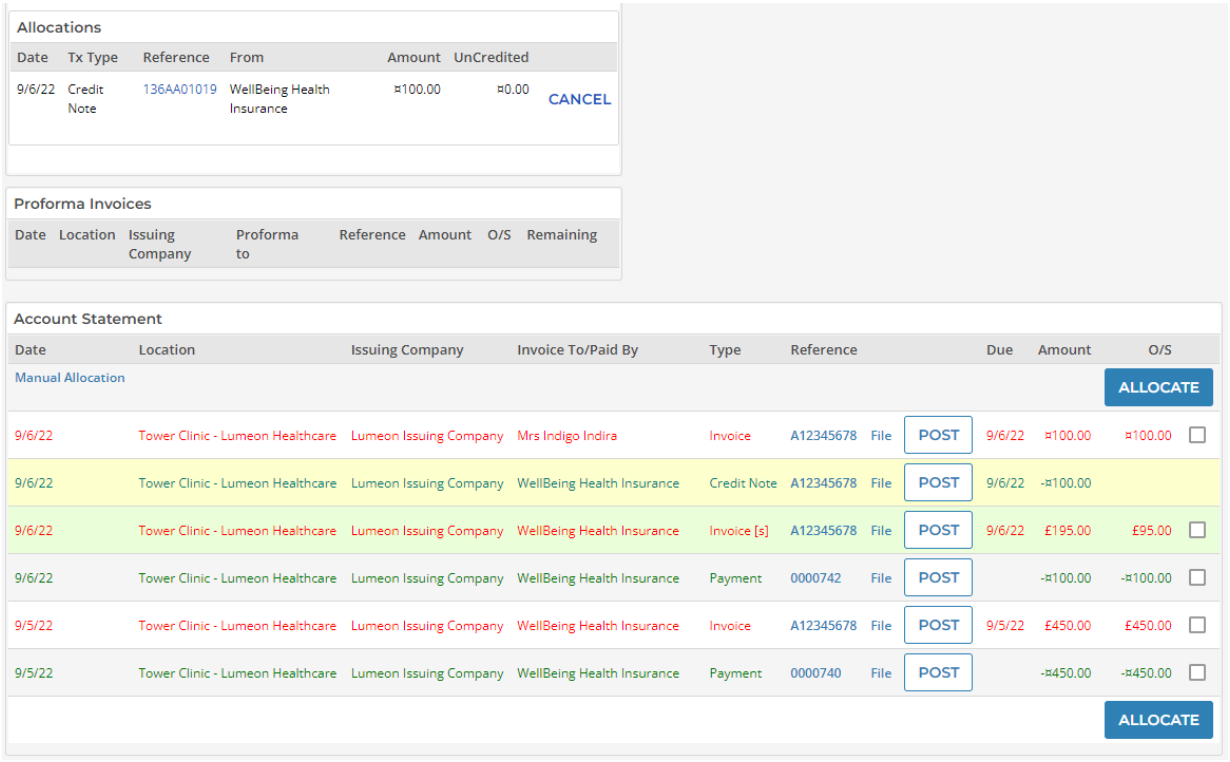
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5. Change the **Amount** if you want to reissue an invoice for part of the total amount and click **Reissue**.



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Conductor creates a credit note to the employer or insurance company with the reissue amount and creates a new invoice for the same amount in the patient's name.



Allocations

Date	Tx Type	Reference	From	Amount	UnCredited	
9/6/22	Credit Note	136AA01019	WellBeing Health Insurance	¤100.00	¤0.00	CANCEL

Proforma Invoices

Date	Location	Issuing Company	Proforma to	Reference	Amount	O/S	Remaining

Account Statement

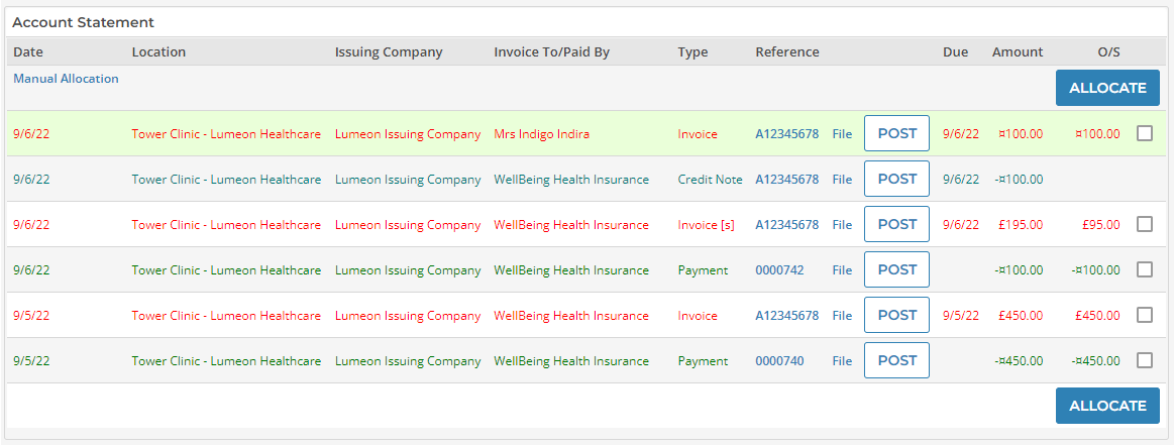
Date	Location	Issuing Company	Invoice To/Paid By	Type	Reference		Due	Amount	O/S	
Manual Allocation									ALLOCATE	
9/6/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	Mrs Indigo Indira	Invoice	A12345678	File POST	9/6/22	¤100.00	¤100.00	☐
9/6/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	WellBeing Health Insurance	Credit Note	A12345678	File POST	9/6/22	-¤100.00		
9/6/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	WellBeing Health Insurance	Invoice [s]	A12345678	File POST	9/6/22	£195.00	£95.00	☐
9/6/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	WellBeing Health Insurance	Payment	0000742	File POST		-¤100.00	-¤100.00	☐
9/5/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	WellBeing Health Insurance	Invoice	A12345678	File POST	9/5/22	£450.00	£450.00	☐
9/5/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	WellBeing Health Insurance	Payment	0000740	File POST		-¤450.00	-¤450.00	☐
									ALLOCATE	

Write off an invoice

Depending on a security point setting for your user role, you may be able to write off an invoice.

To write off an invoice and credit it back to the employer, insurance company, or patient:

1. Search for the patient using the **Search Patient** option in the top menu bar.
2. Select **Invoices & Payments** in the **Patient** menu.
3. Click the reference number of the invoice that you want to write off in the **Account Statement** table. The invoice details are displayed in the **Invoice Detail** form.

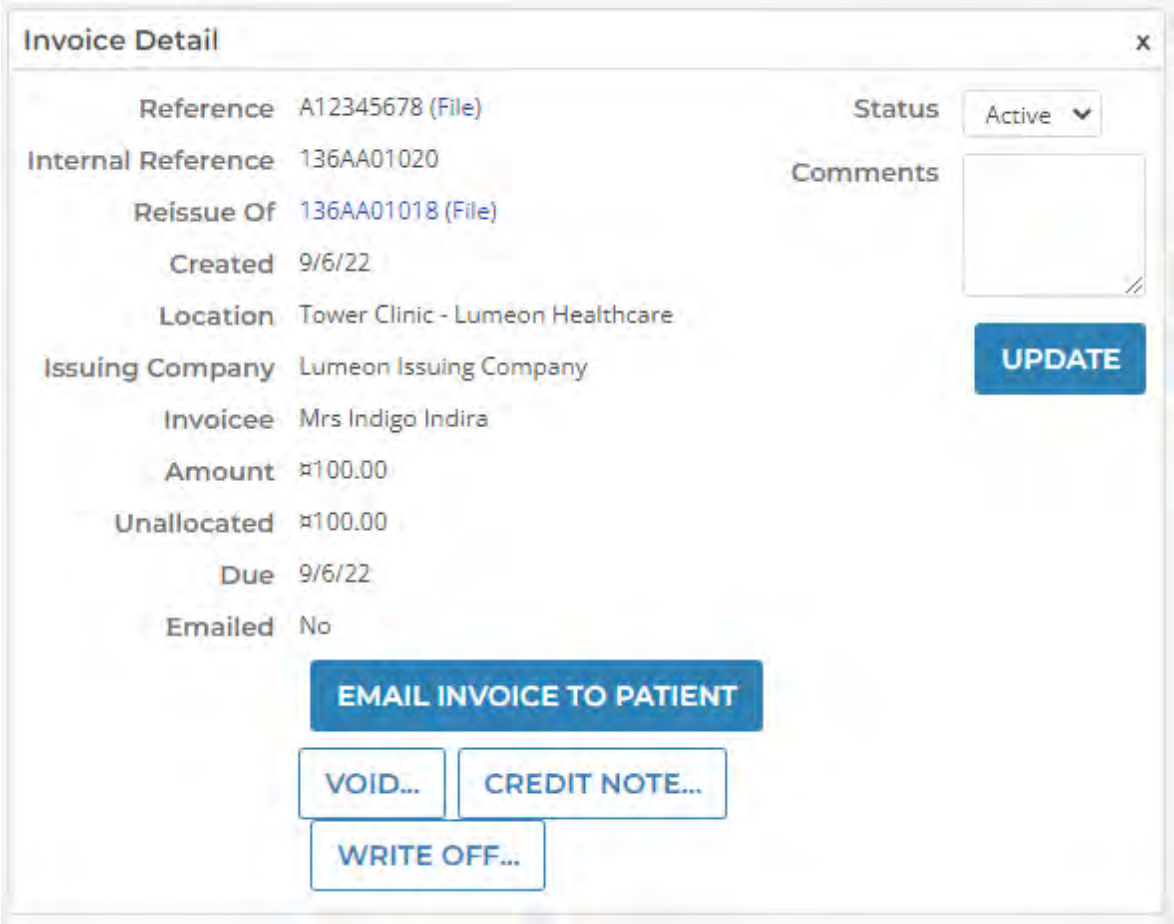


Account Statement

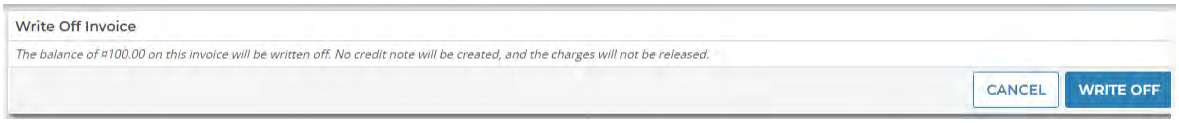
Date	Location	Issuing Company	Invoice To/Paid By	Type	Reference		Due	Amount	O/S	
Manual Allocation									ALLOCATE	
9/6/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	Mrs Indigo Indira	Invoice	A12345678	File POST	9/6/22	¤100.00	¤100.00	☐
9/6/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	WellBeing Health Insurance	Credit Note	A12345678	File POST	9/6/22	-¤100.00		
9/6/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	WellBeing Health Insurance	Invoice [s]	A12345678	File POST	9/6/22	£195.00	£95.00	☐
9/6/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	WellBeing Health Insurance	Payment	0000742	File POST		-¤100.00	-¤100.00	☐
9/5/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	WellBeing Health Insurance	Invoice	A12345678	File POST	9/5/22	£450.00	£450.00	☐
9/5/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	WellBeing Health Insurance	Payment	0000740	File POST		-¤450.00	-¤450.00	☐
									ALLOCATE	

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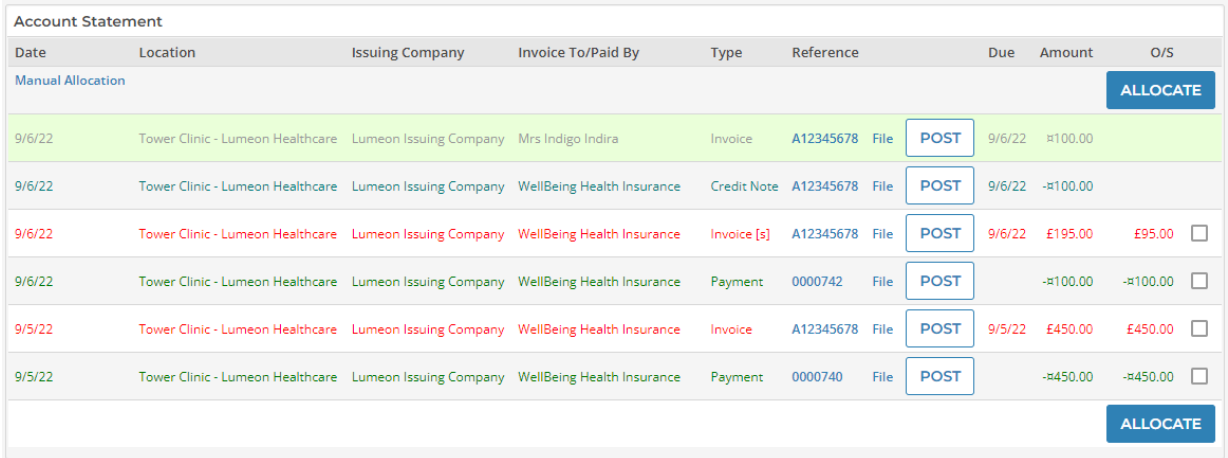
4. Click **Write Off** in the **Invoice Detail** form.



5. In the confirmation box, click **Write Off**.



The invoice shows in grey in the **Account Statement** table and you cannot allocate it.

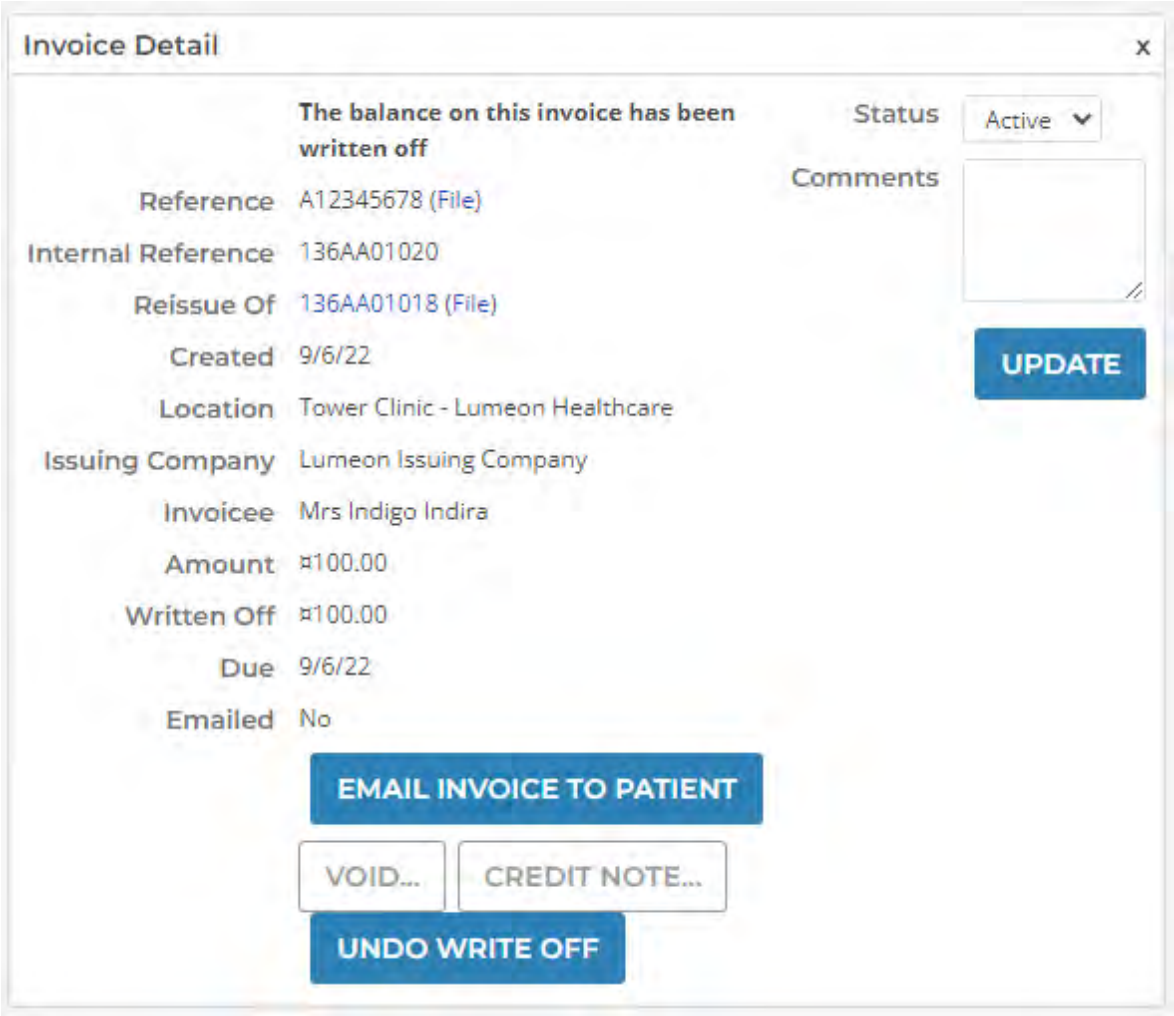


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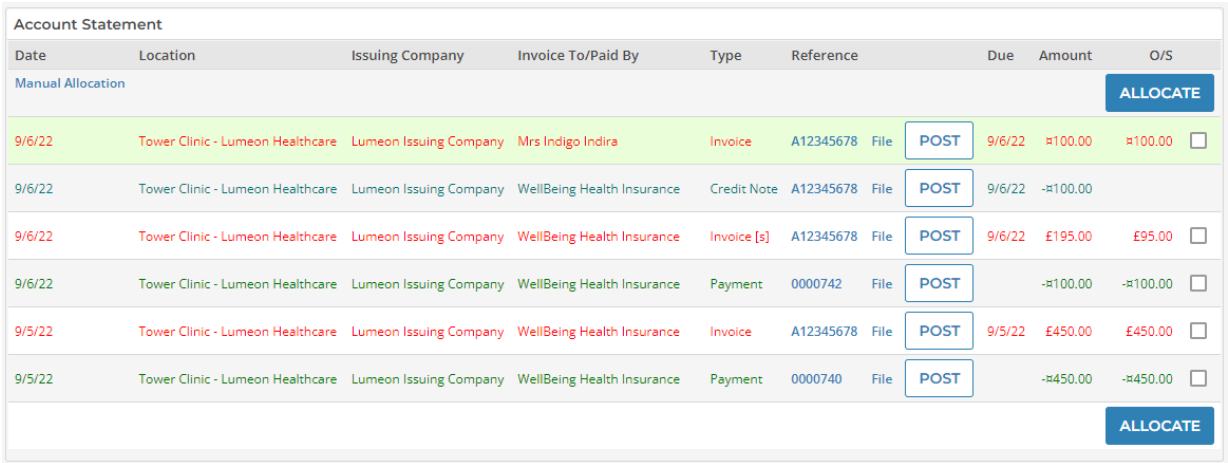
Undo a write off

If you have made a mistake, you can undo a write off:

1. Click the reference number for the written off invoice in the account statement.
2. Click **Undo Write Off** in the **Invoice Detail** form to reverse the write off.



The invoice shows in red in the **Account Statement** table and you can allocate it.



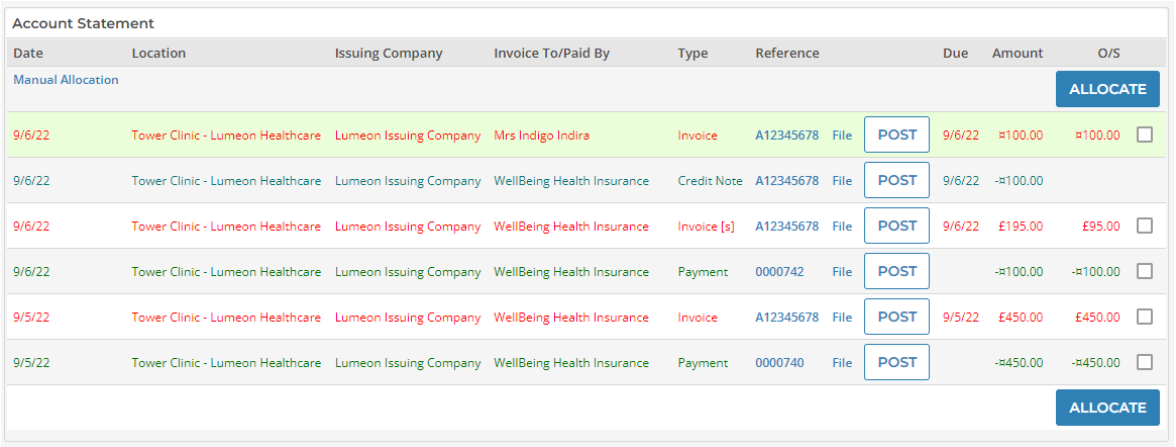
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Void an invoice

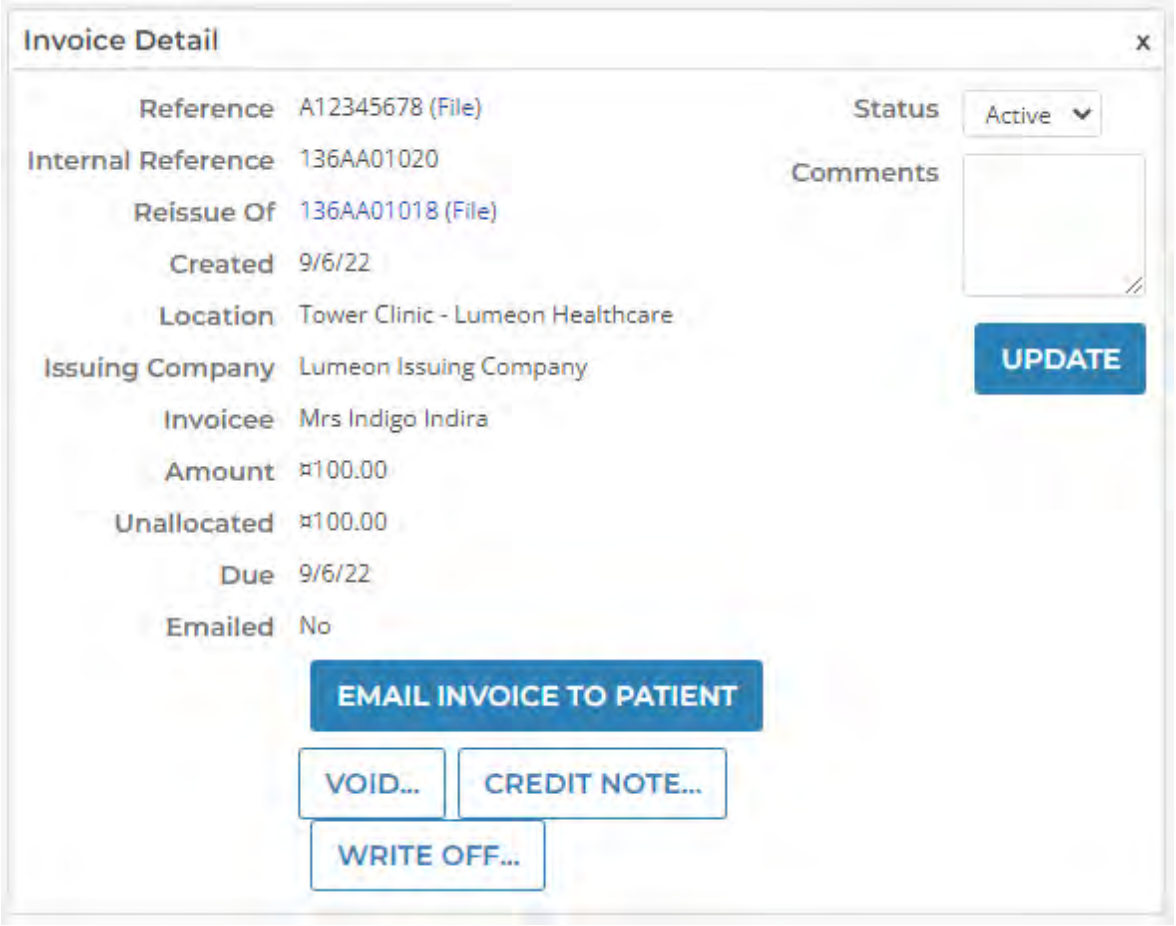
Depending on a security point setting for your user role, you may be able to roll back or void an invoice.

To roll back or void an invoice for a patient, employer, or insurance company:

1. Click the reference number of the invoice that you want to void in the **Account Statement** table. The invoice details are displayed in the **Invoice Detail** form.



2. Click **Void** in the **Invoice Detail** form.

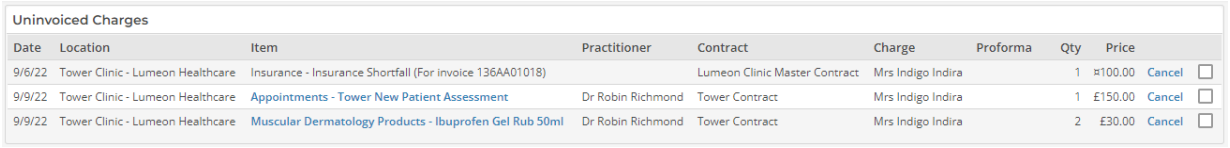


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3. In the confirmation box, click **Void**.



Conductor removes the invoice from the account statement and returns all items on the voided invoice to the patient's, employer's, or insurance company's list of uninvoiced charges.

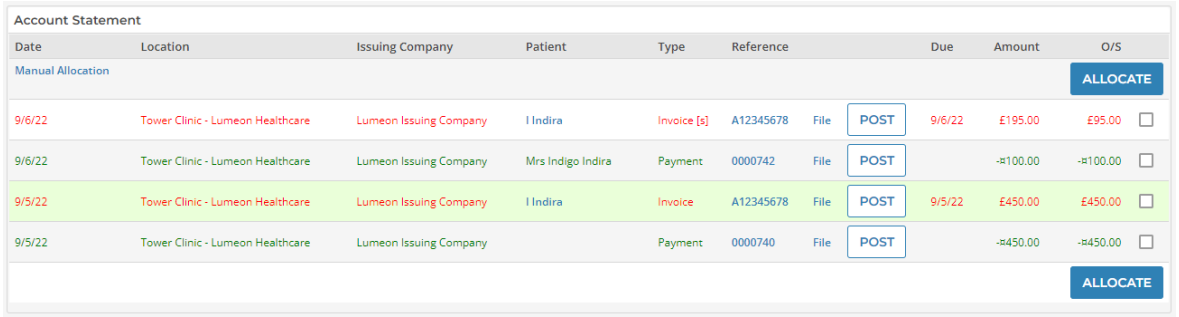


Create a credit note

Depending on a security point setting for your user role, you may be able to create a credit note.

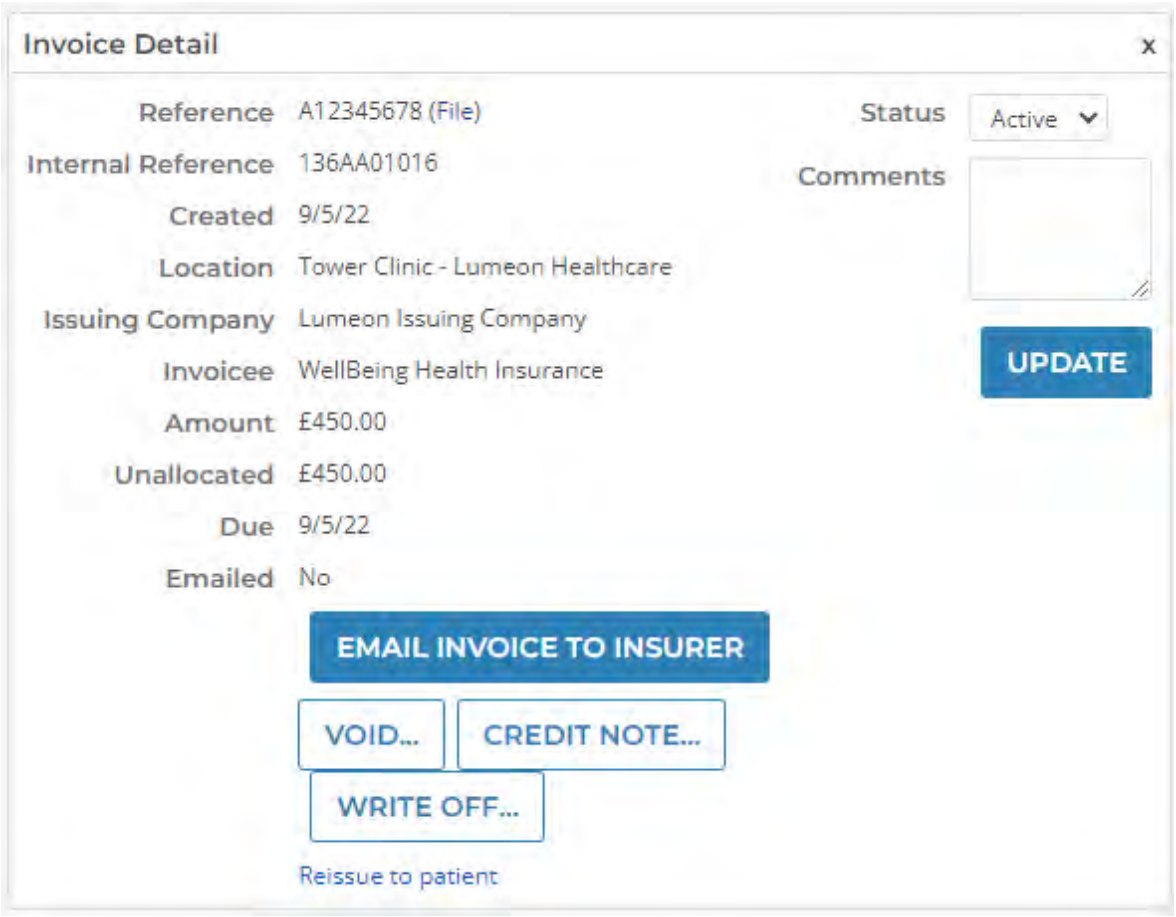
To create a credit note for a patient, employer, or insurance company:

1. Click the reference number of the invoice that you want to create a credit note for in the **Account Statement** table. The invoice details are displayed in the **Invoice Detail** form.

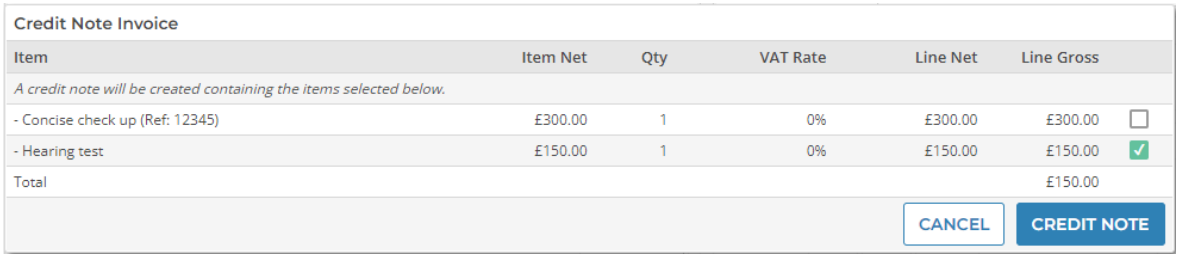


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2. Click **Credit Note** in the **Invoice Detail** form.



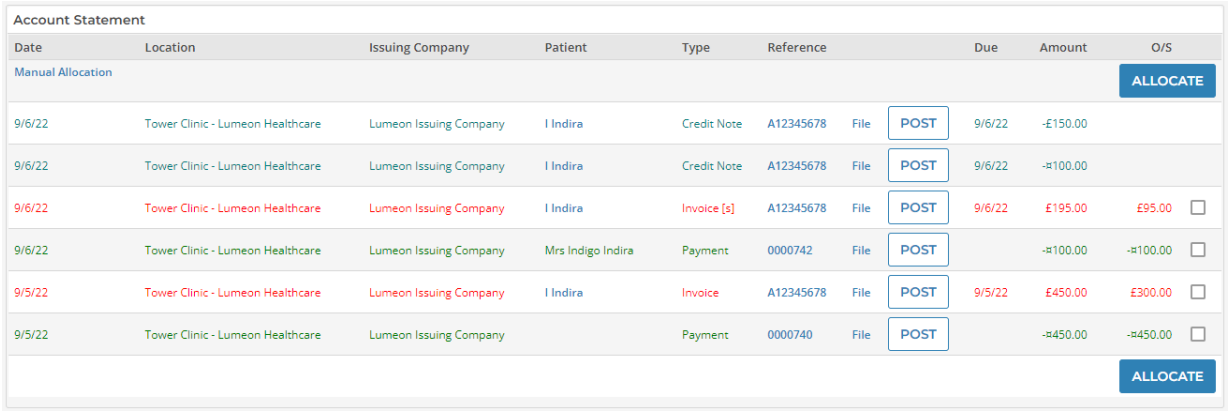
3. You can create a credit note for all or some of the items in the invoice. The **Credit Note Invoice** window automatically selects all the items. Clear the check box against any of the items that you do not want included in the credit note.



4. Click **Credit Note**.

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Conductor creates a credit note for the invoice items that you selected. You can view the credit note in the account statement if you select **Include allocated** and click **Filter** in the **Filter Statement** form.



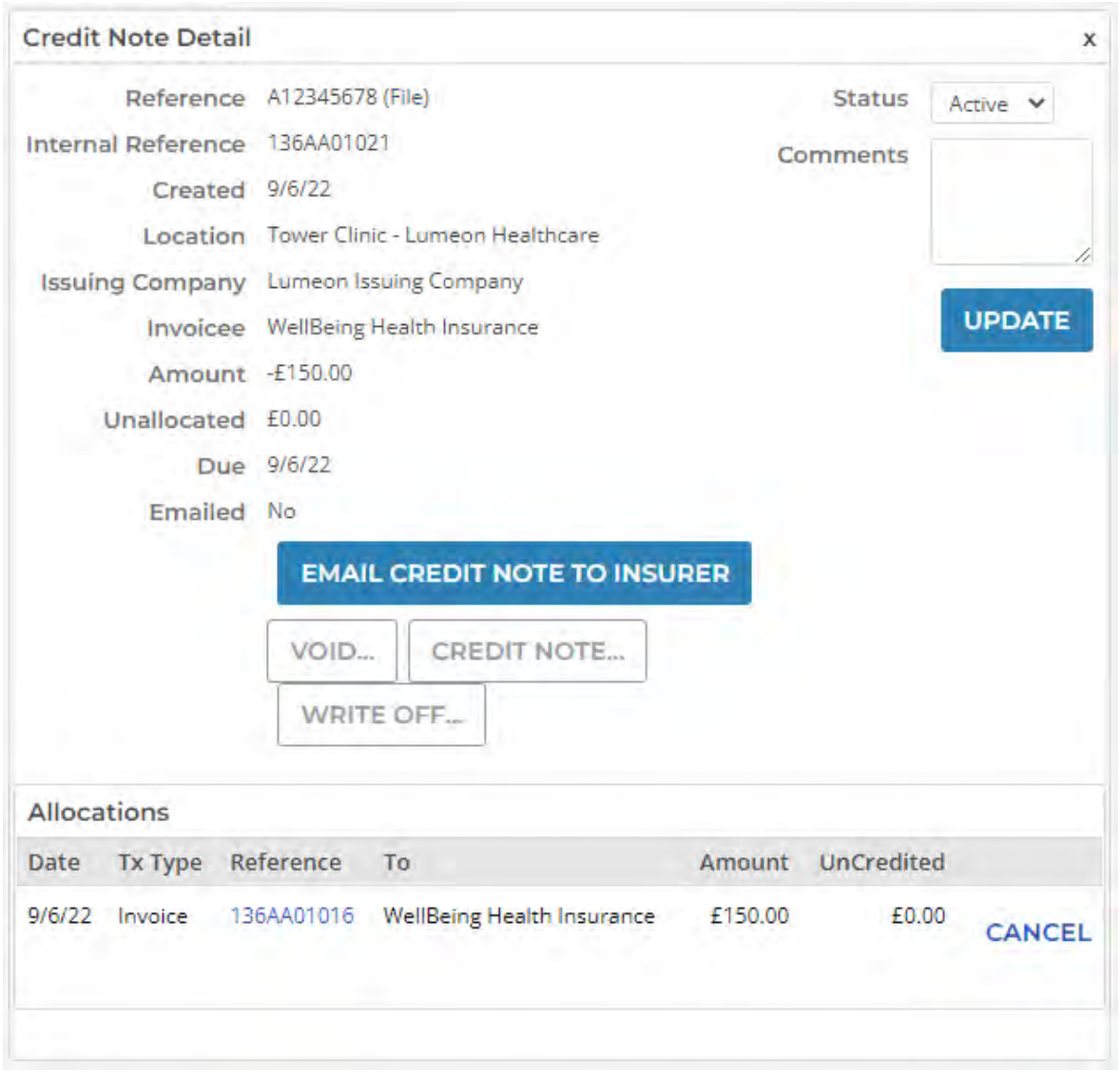
Void a credit note

If you have made a mistake, you can void the credit note. To do this, you must cancel the allocation of the credit note to the invoice and then void the credit note:

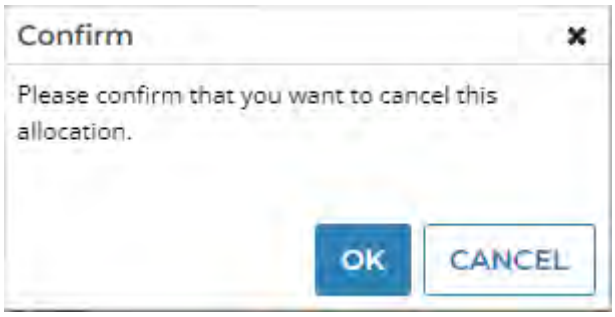
1. Click the reference number of the credit note that you want to void in the account statement. This displays the **Credit Note Detail** form for the credit note and the **Allocations** table containing the allocation of the credit note to the invoice.

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2. Click **Cancel** in the **Allocations** form.

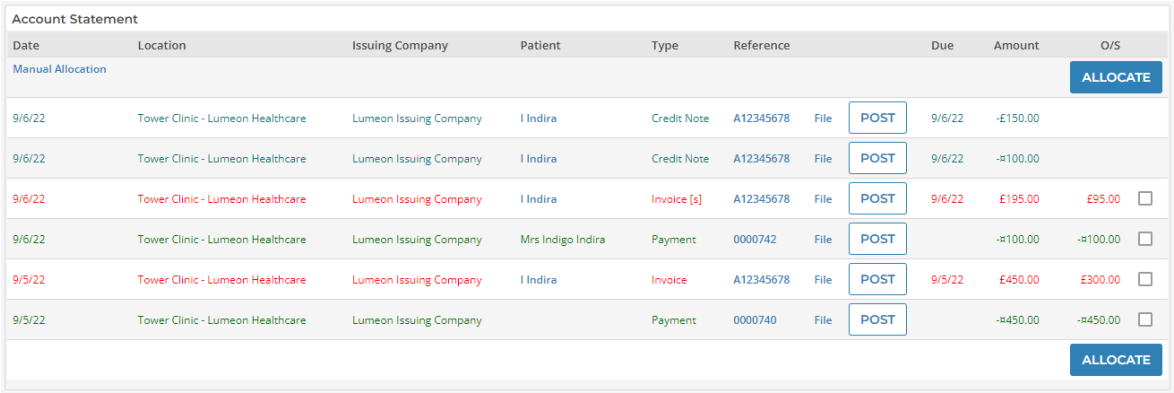


3. Click **OK** in the **Confirm** window.

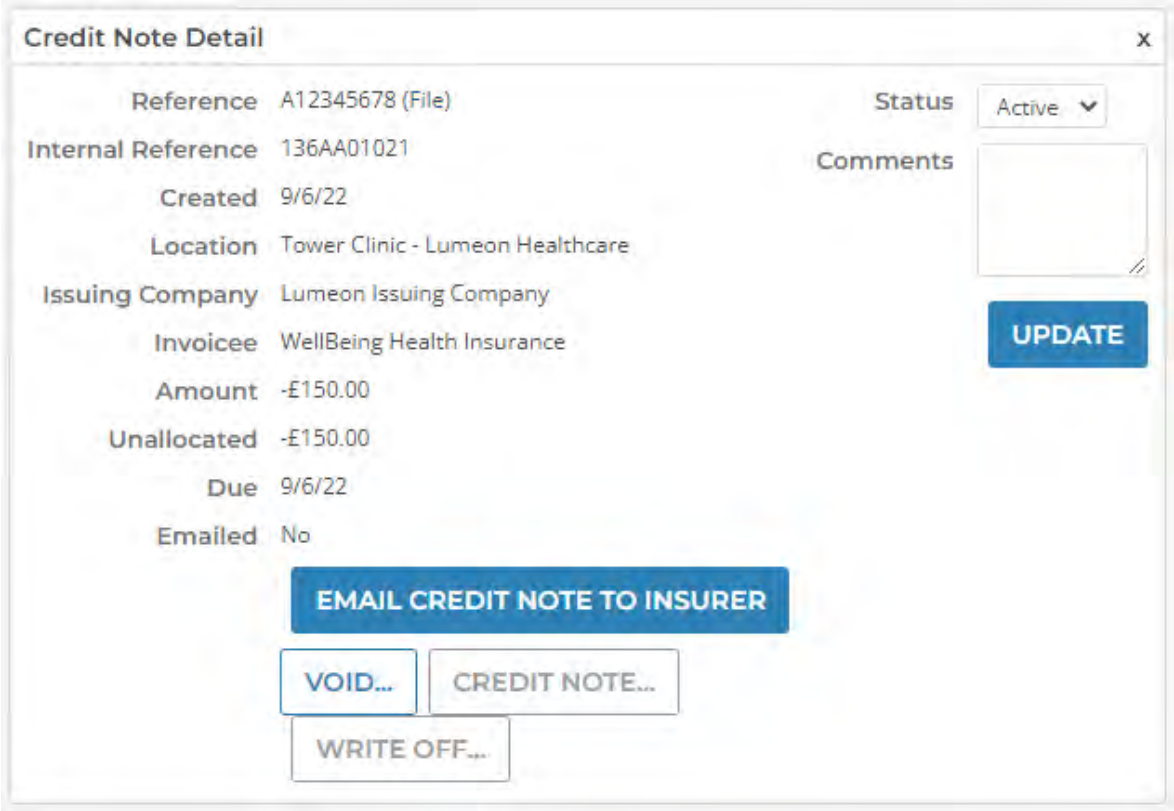


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4. Click the reference number of the credit note that you want to void in the account statement. This displays the **Credit Note Detail** form for the credit note.



5. Click **Void** in the **Credit Note Detail** form.

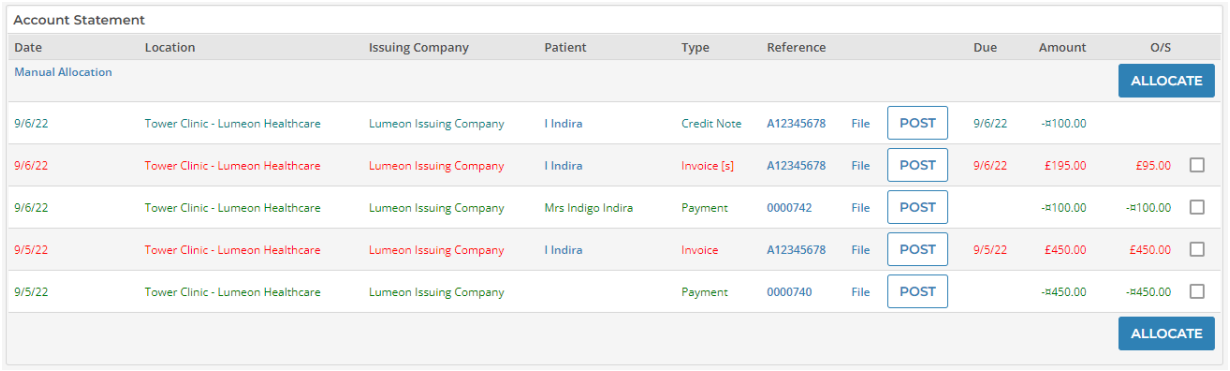


6. Click **Void** in the **Void Invoice** confirmation window.



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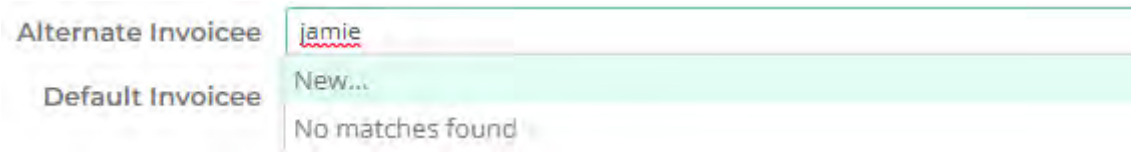
Conductor deletes the credit note and it no longer displays in the account statement.



Alternate invoicee

You can establish an alternate invoicee for a patient. To do this:

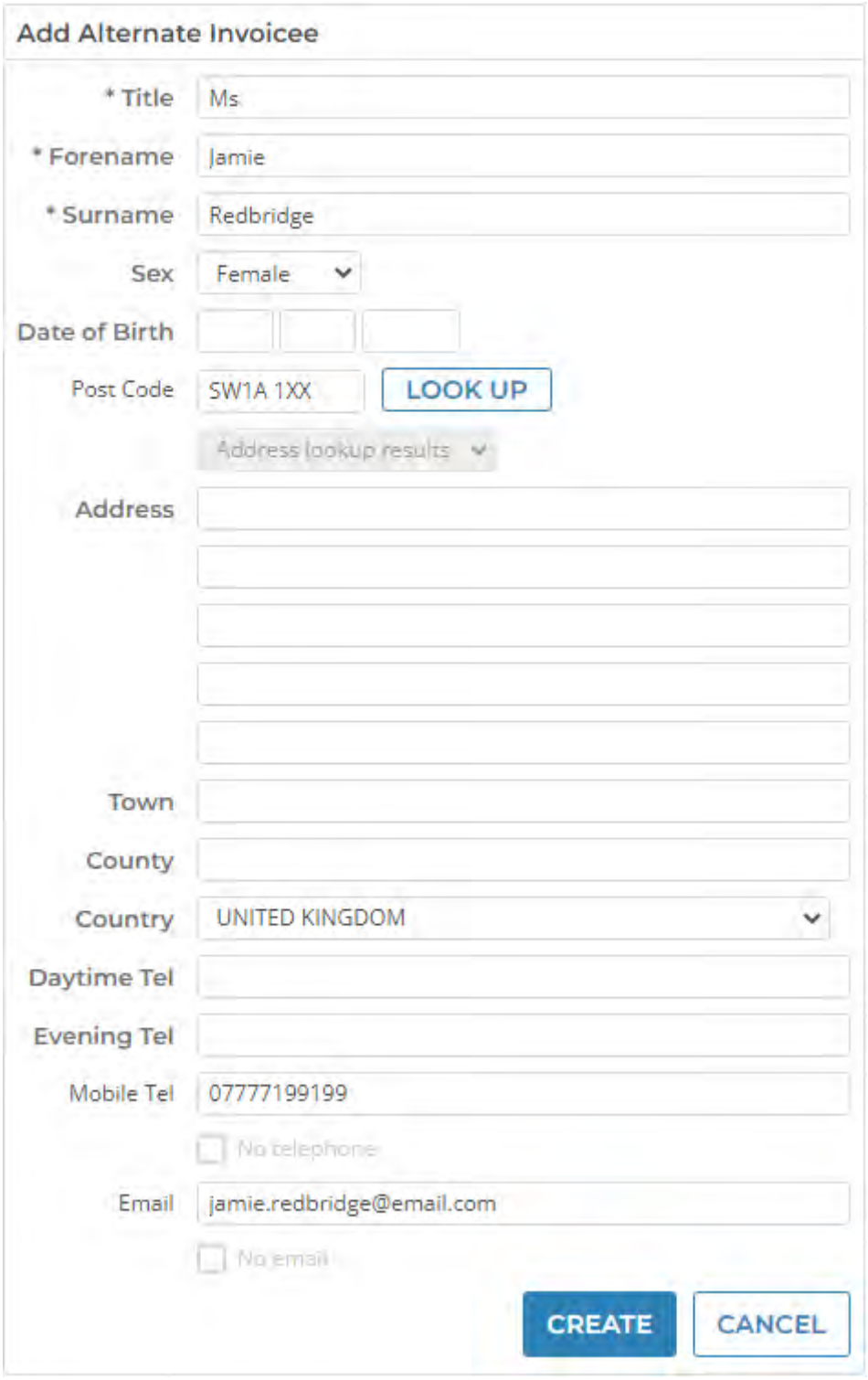
1. Search for the patient using the **Search Patient** option in the top menu bar.
2. Select **Patient Details** in the **Patient** menu.
3. Start typing the name of the alternate invoicee in the **Alternate Invoicee** field.



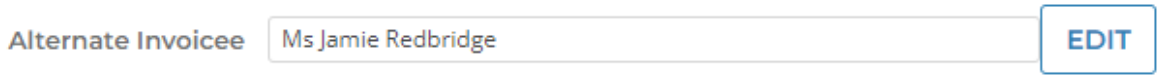
4. If the name exists, select it from the drop-down list.

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5. Alternatively, click **New** to display the **Add Alternate Invoicee** window.



6. Enter the details of the new alternate invoicee and click **Create**. Conductor adds the new alternate invoicee to the patient.



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Refund a patient

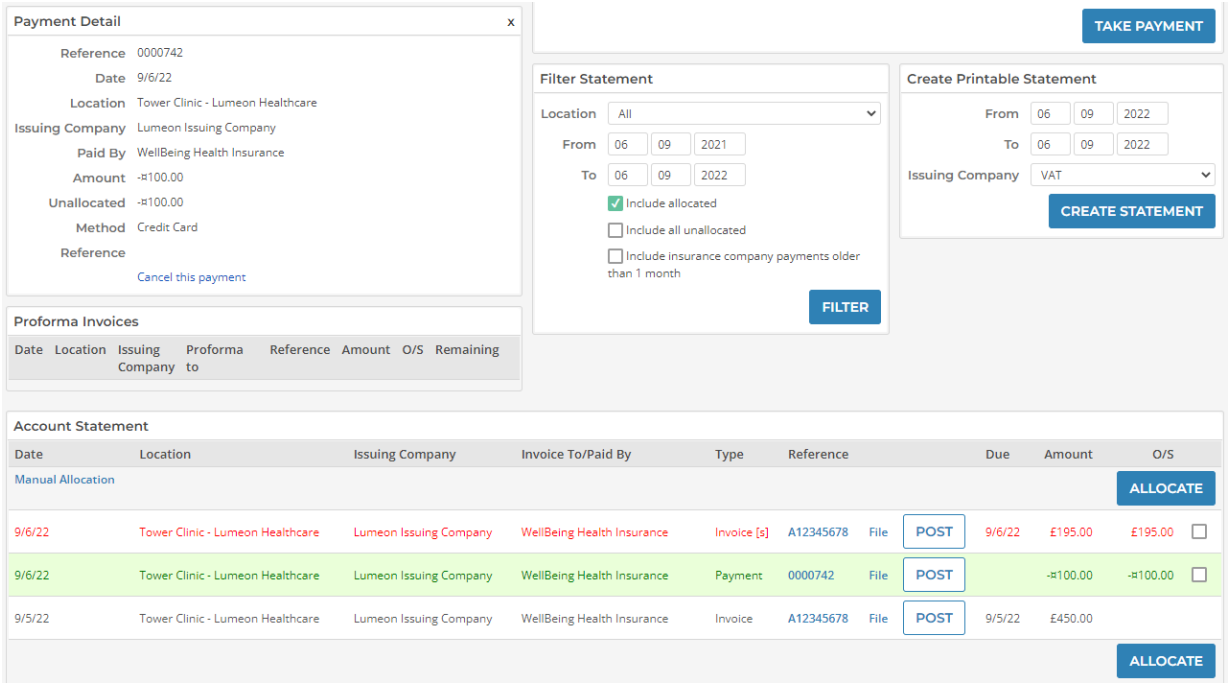
To refund a patient:

1. Click **Refund** on the payment line in the **Account Statement** for the patient. A **Refund payment** window displays.
2. Enter the amount of the refund. The **Refund payment** window displays the amount of the original payment and any amount already refunded. The refund cannot be greater than the original payment amount minus any refunds that have already been made.
3. Click **OK**. The refund is automatically made to the credit card or payment method used for the original payment. If your organization is integrated with the external payment provider, Conductor transmits the refund transaction to the payment provider.

Cancel a payment

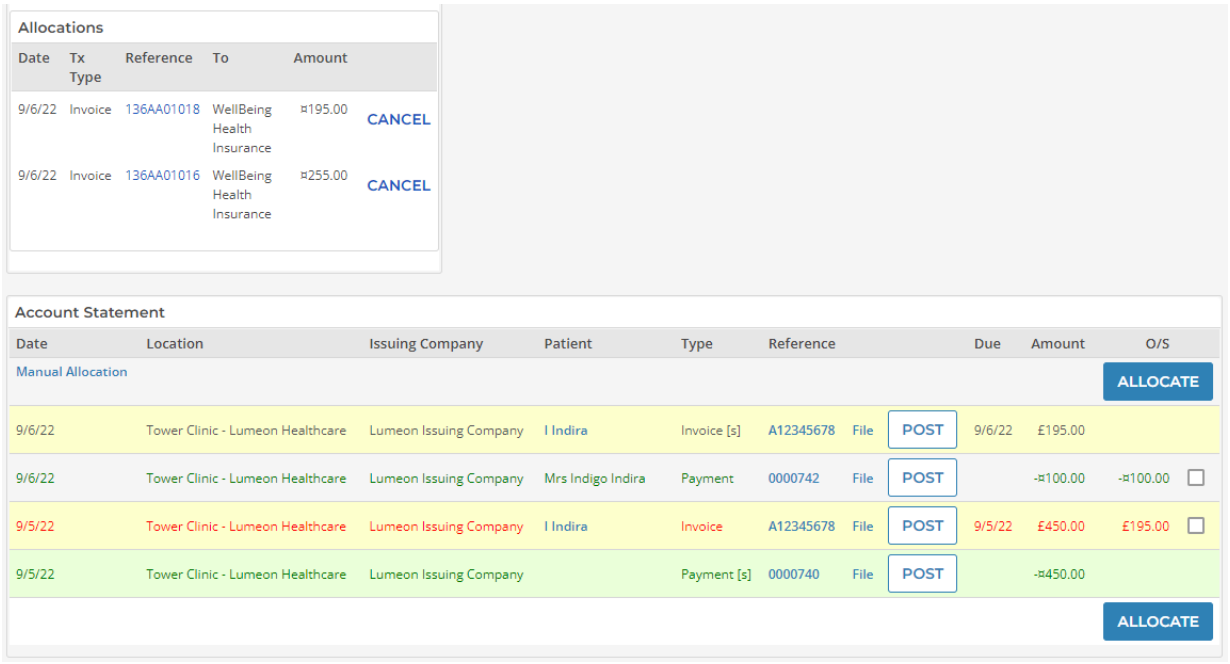
If you have made a mistake, for example, you allocated a part-payment to the wrong invoice or you took an incorrect payment, you can undo the error.

You can cancel a payment if you have not allocated it to an invoice. To do this, click the payment reference number and then click **Cancel this payment** in the **Payment Detail** form.



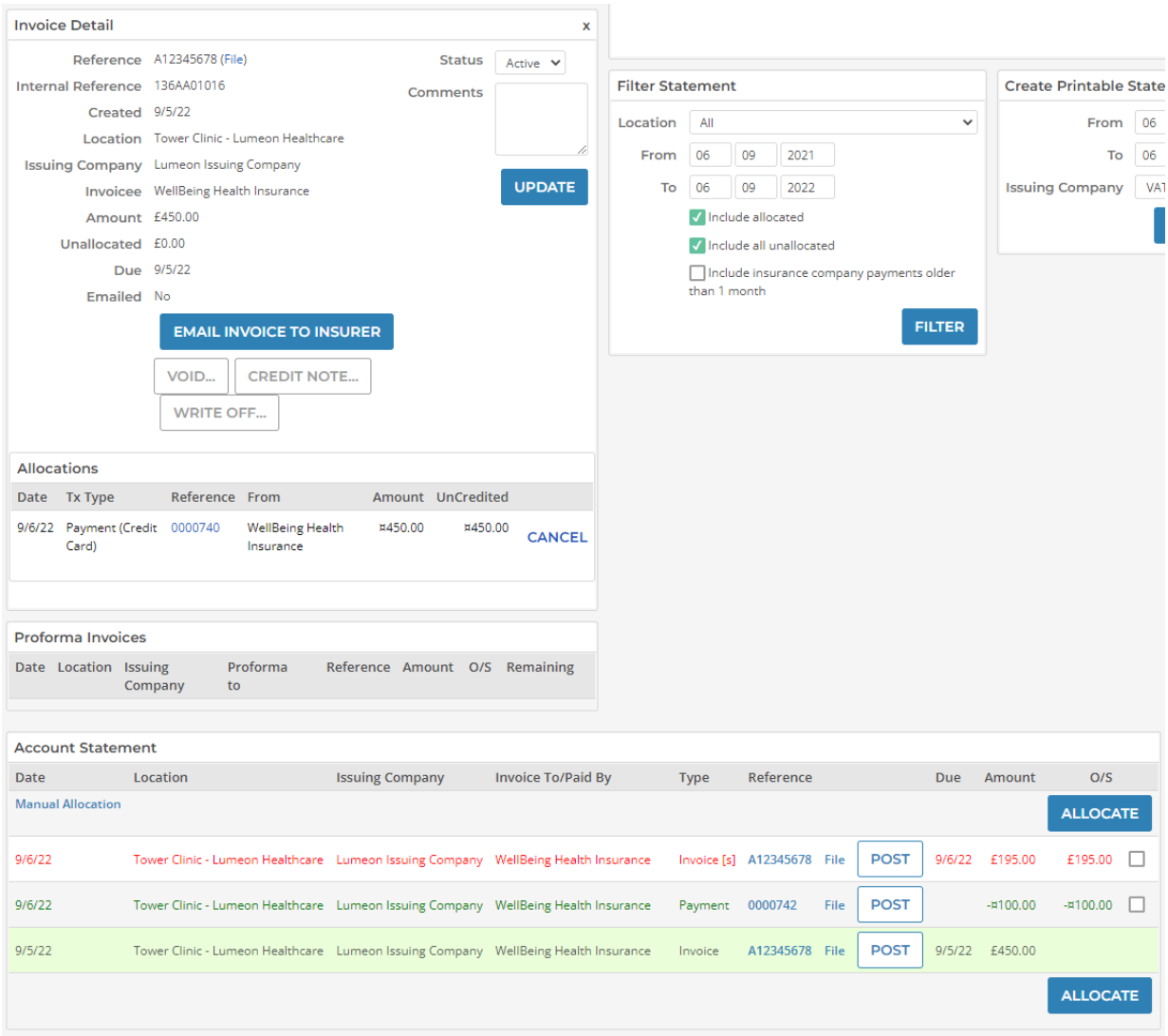
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If you can see the payment because it has been partly allocated or allocated against more than one invoice, click the payment reference number and an **Allocations** form appears above. Click **Cancel** to cancel the allocation(s). You can then cancel the payment if necessary.



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If you cannot see a payment because it has been fully allocated to an invoice, click the invoice reference number and the **Invoice Details** and an **Allocations** form appear above. Click **Cancel** to cancel the allocation. You can then cancel the payment if necessary.



Proformas

You can use proformas to take payment for an appointment and associated charges, before the appointment has taken place.

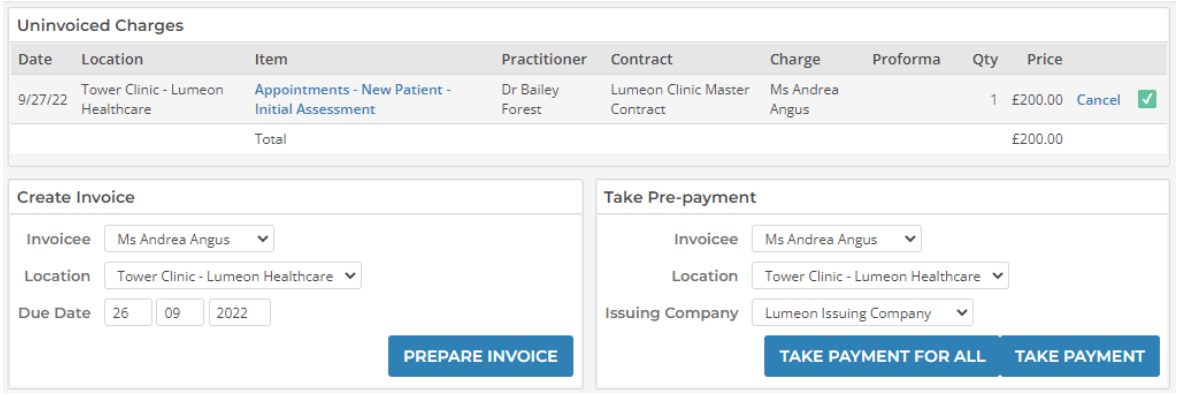
Create a proforma

To create a proforma before an appointment:

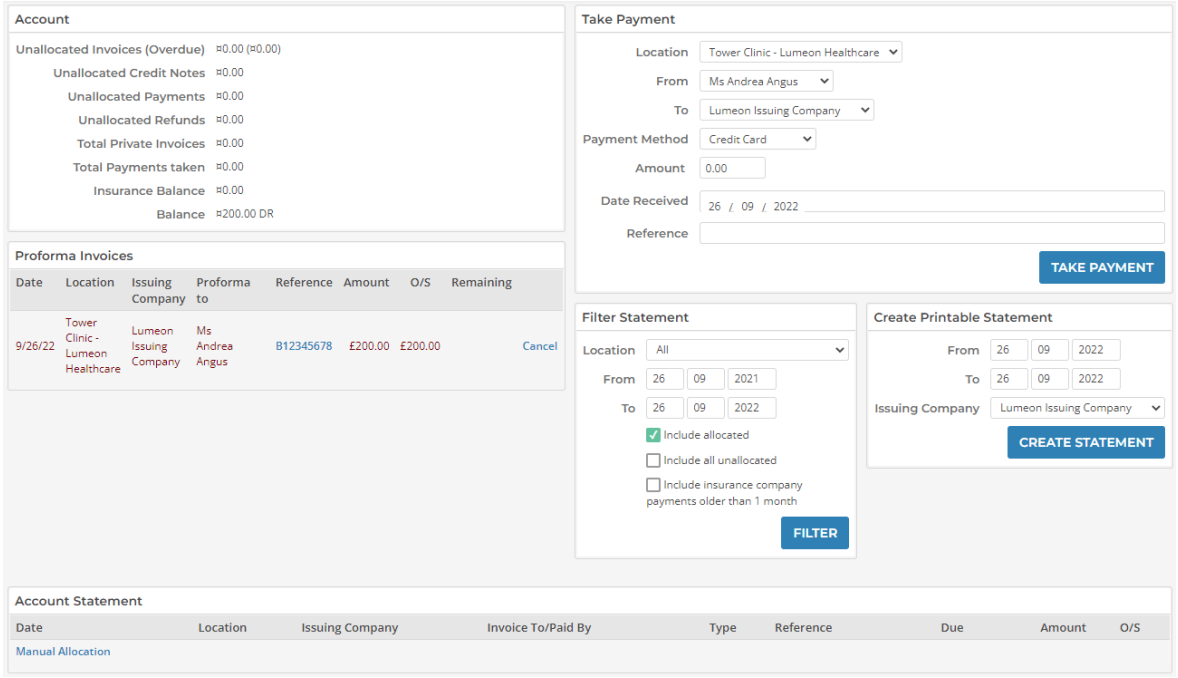
1. Search for the required patient using the **Patient Search** option in the top menu bar.
2. Click **Charges** in the **Patient** menu.

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3. Select the charge in the **Uninvoiced Charges** table and click **Take Payment** in the **Take Pre-payment** form.

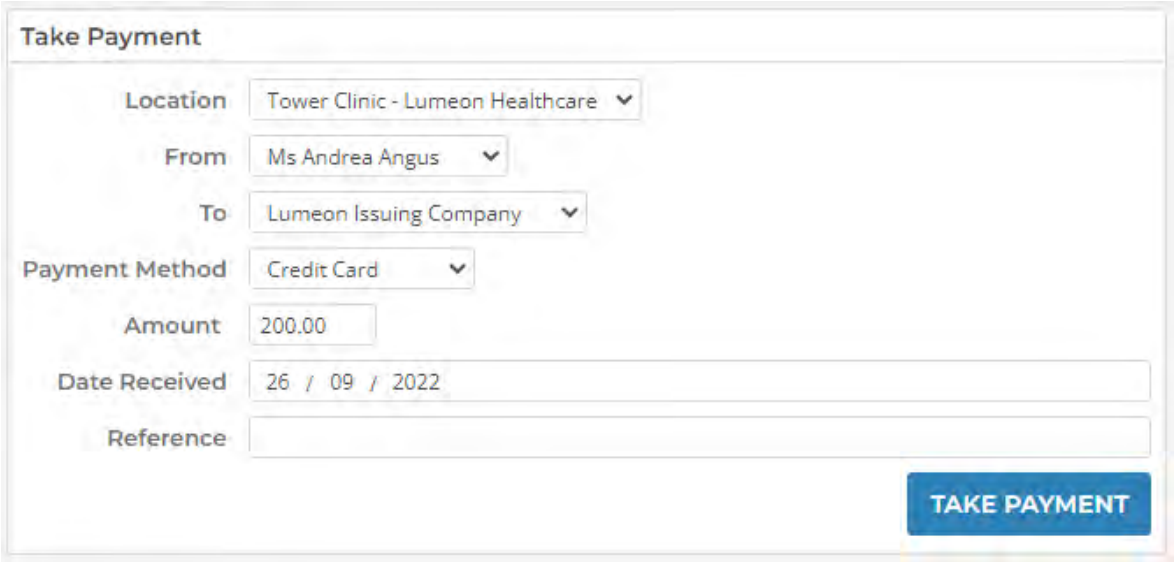


This allocates a proforma number to the charge and displays the proforma invoice in the patient's **Invoices & Payments** page.



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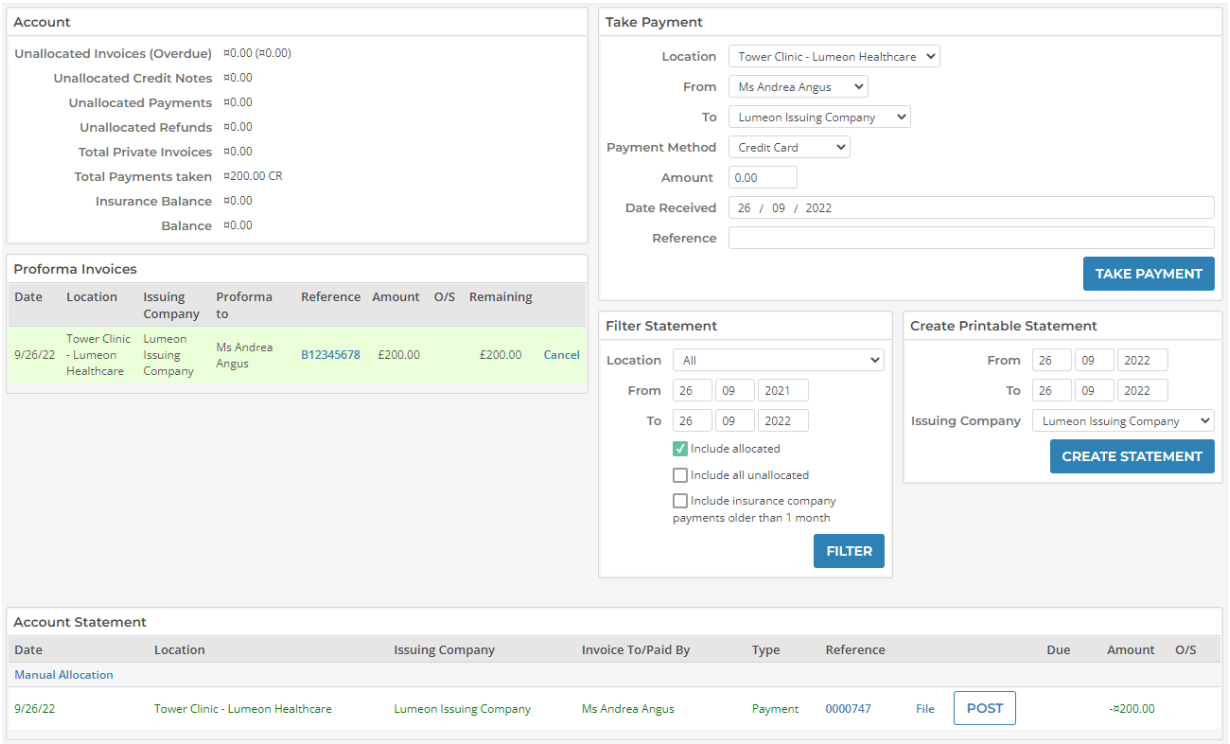
4. Click the proforma number to display the **Amount** in the **Take Payment** form. You can take a part payment by changing the amount in the **Amount** field.



5. Click **Take Payment** in the **Take Payment** form.

   If you have taken a part payment, the **Amount** field automatically displays what is left to pay.

Conductor updates the **Remaining** amount in the pro-forma invoice with the amount paid and creates a line for the pre-payment in the **Account Statement** table.

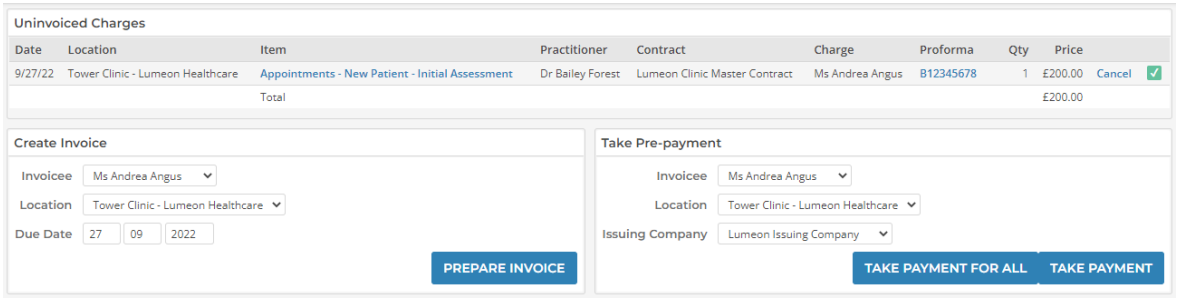


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Prepare a proforma invoice

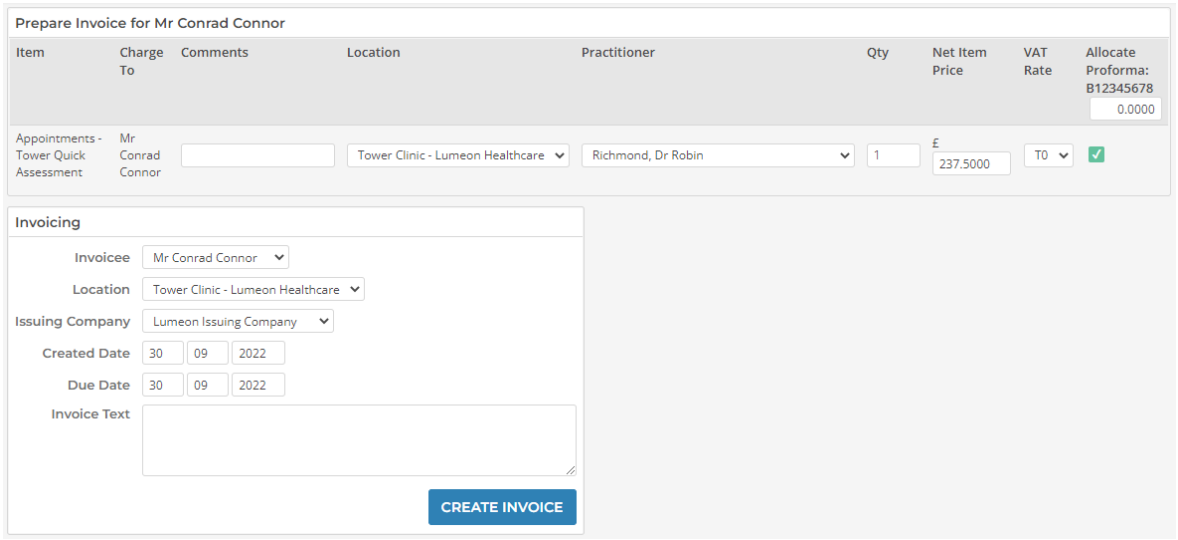
Once the appointment has taken place, you can prepare the proforma invoice. To do this:

1. Search for the required patient using the **Patient Search** option in the top menu bar.
2. Click **Charges** in the **Patient** menu.
3. Select the charge and click **Prepare Invoice** in the **Create Invoice** form.



The **Prepare Invoice** page displays.

4. On the **Prepare Invoice** page, check the details of the invoice in the **Invoicing** form and click **Create Invoice**.



Cancel a proforma

To cancel a proforma:

1. Search for the required patient using the **Patient Search** option in the top menu bar.
2. Click **Invoices & Payments** in the **Patient** menu.

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3. Click **Cancel** in the row of the proforma invoice.



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Discounts

Lumeon Conductor enables you to create discount codes which you can apply to appointments. Discounts can reduce the original price of an appointment by application of either a flat rate nominal amount or a percentage. For example:

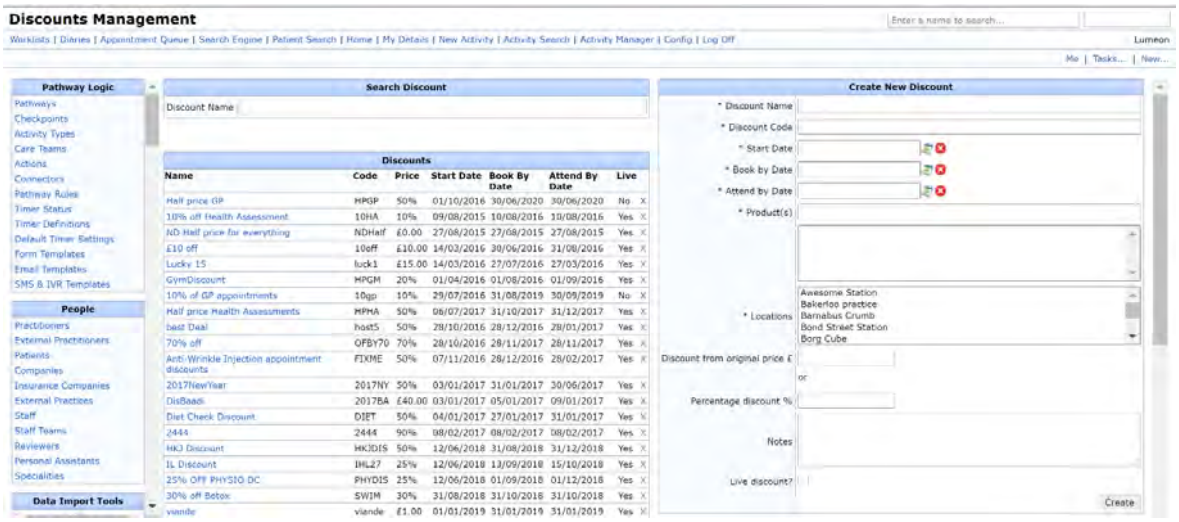
Original appointment price	Nominal discount	Discounted appointment price	Percentage discount	Discounted appointment price
£350.00	£50	£300.00	50%	£175.00
£200.00	£25	£175.00	25%	£150.00
£99.00	£20	£79.00	20%	£79.20

You can also create discounts that apply to some or all locations.

Manage discounts

To manage discounts:

1. Select **Manage Discounts** in the **Discounts** menu. The **Discounts Management** page displays. A **Search Discount** form and a table of existing active and inactive discounts display on the left, and the **Create New Discount** form displays on the right.



2. To search for an existing discount, start typing the name of the discount in the **Discount Name** field in the **Search Discounts** form to display a list of discounts that match the entered text. Select the required discount to view the details. Alternatively, scroll down and select the discount from the list.

3. To create a new discount, enter the details in the **Create New Discount** form. See *Create a discount (page 51)*.

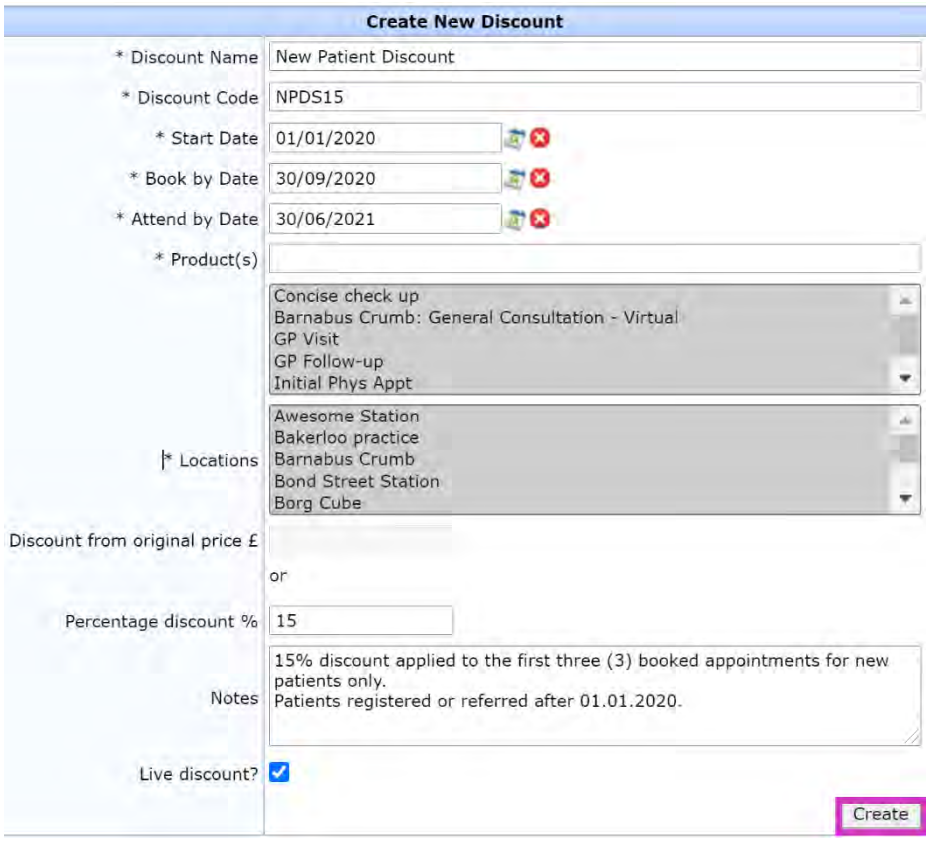
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Create a discount

To create a new discount:

1. Select **Manage Discounts** in the **Discounts** menu. The **Discounts Management** page displays. A **Search Discount** form and a table of existing active and inactive discounts display on the left, and the **Create New Discount** form displays on the right.

2. Enter the discount details in the **Create New Discount** form using the descriptions of the discount fields in the table *below (page 51)*.



3. When you have completed the information, click **Create** to save the new discount. The newly created discount is added to the table of existing discounts.

When raising an invoice for a discounted product, the invoice shows the changed price on the invoice but does not show the discount as a line in the invoice.

Discount fields

Complete the discount's details using the following table. Fields with an asterisk (*) are mandatory.

Field	Description
Discount Name *	Full name of the discount.
Discount Code *	Code entered by administrators or patients at the time of booking. Codes cannot be amended once created. Codes must be 6 characters maximum.
Start Date *	Date the discount becomes effective.
Book by Date *	Date by which a booking must be made for the discount to apply.
Attend by Date *	Date by which patients must attend an appointment for the discount to apply.

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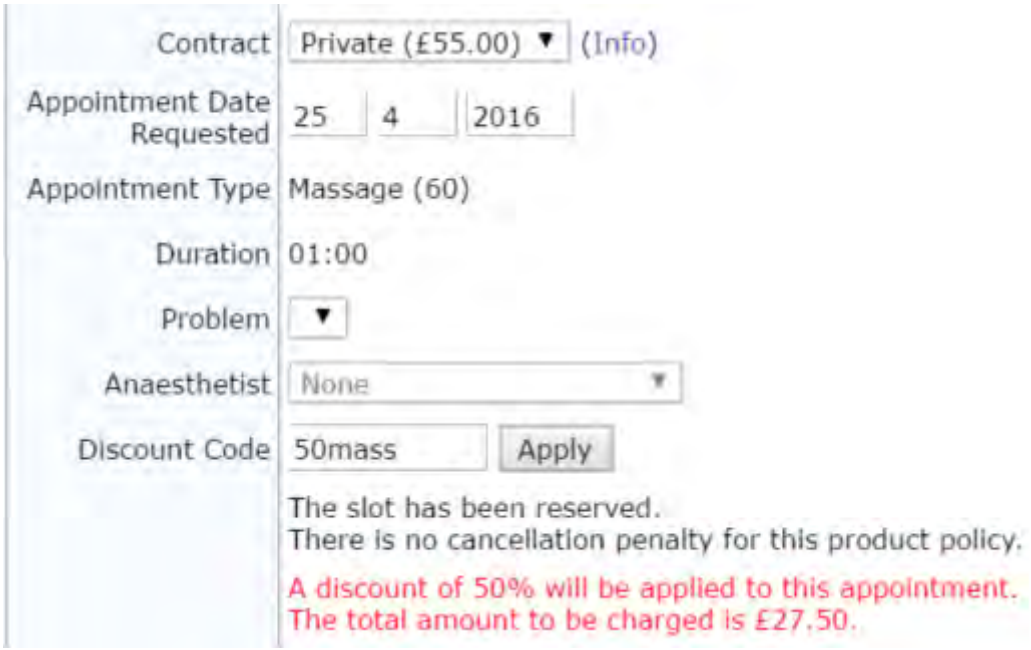
Field	Description
Products *	Appointment(s) to which the discount applies. This field works on auto-complete. Begin typing the name of the appointment, select the relevant option from displayed results to populate the selection in the field below.
Locations *	Select the locations to which the discounts applies.
Discount from original price £	Enter a nominal value discount from the original price.
Percentage discount %	Enter a percentage value discount from the original price.
Notes	Enter any additional information about the discount.
Live discount	Check this box to activate the discount.

Apply discounts to a product

When booking a patient appointment, the **Create Appointment** page displays the **Discount Code** field in the **Appointment Details** form.

To apply a discount when booking an appointment:

1. Enter the discount code into the **Discount Code** field and then click **Apply**. A message displays in red text confirming the discount application and the discounted appointment price.
2. Review the appointment booking to confirm details are correct, then click **Create**.



The discounted appointment price is recorded and you can view it in the patient's **Charges** page.

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Redeemable credit rules

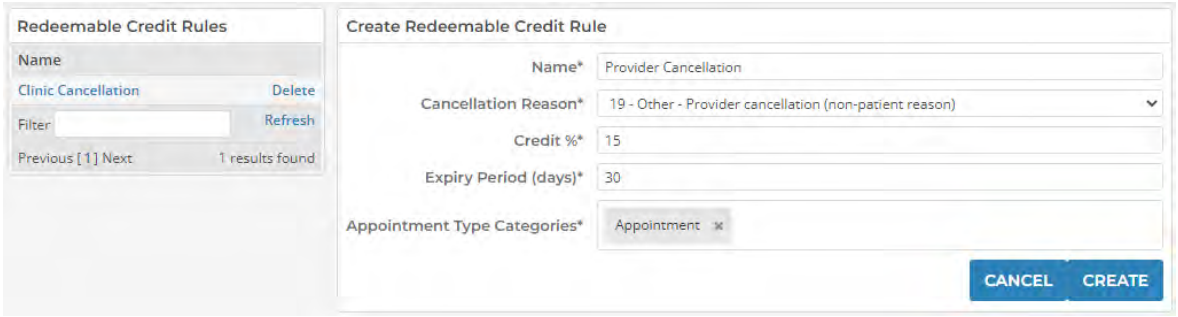
Redeemable credit rules functionality enables patients or payors to be credited with a percentage discount off their next appointment for the same patient if their current appointment is cancelled due to a non-patient reason. Conductor only creates the credit if the cancellation occurs after the end of day on the day before the appointment in accordance with the configured working hours.

You can also use redeemable credits with rescheduled appointments so that Conductor applies the redeemable credit to the newly scheduled appointment during the reschedule process, provided that the criteria for the redeemable credit rule are satisfied.

Create a redeemable credit rule

To create a redeemable credit rule:

1. Select **Redeemable Credit Rules** in the **Runtime Options** menu. A table of existing redeemable credit rules displays on the left and the Create Redeemable Credit Rule form displays on the right.



2. Enter the details of the redeemable credit rule using the table in *Redeemable credit rule fields (page 53)* below.

3. Click **Create**.

Redeemable credit rule fields

Complete the details of the redeemable credit rule using the following table. All fields are mandatory (shown with an asterisk (*)).

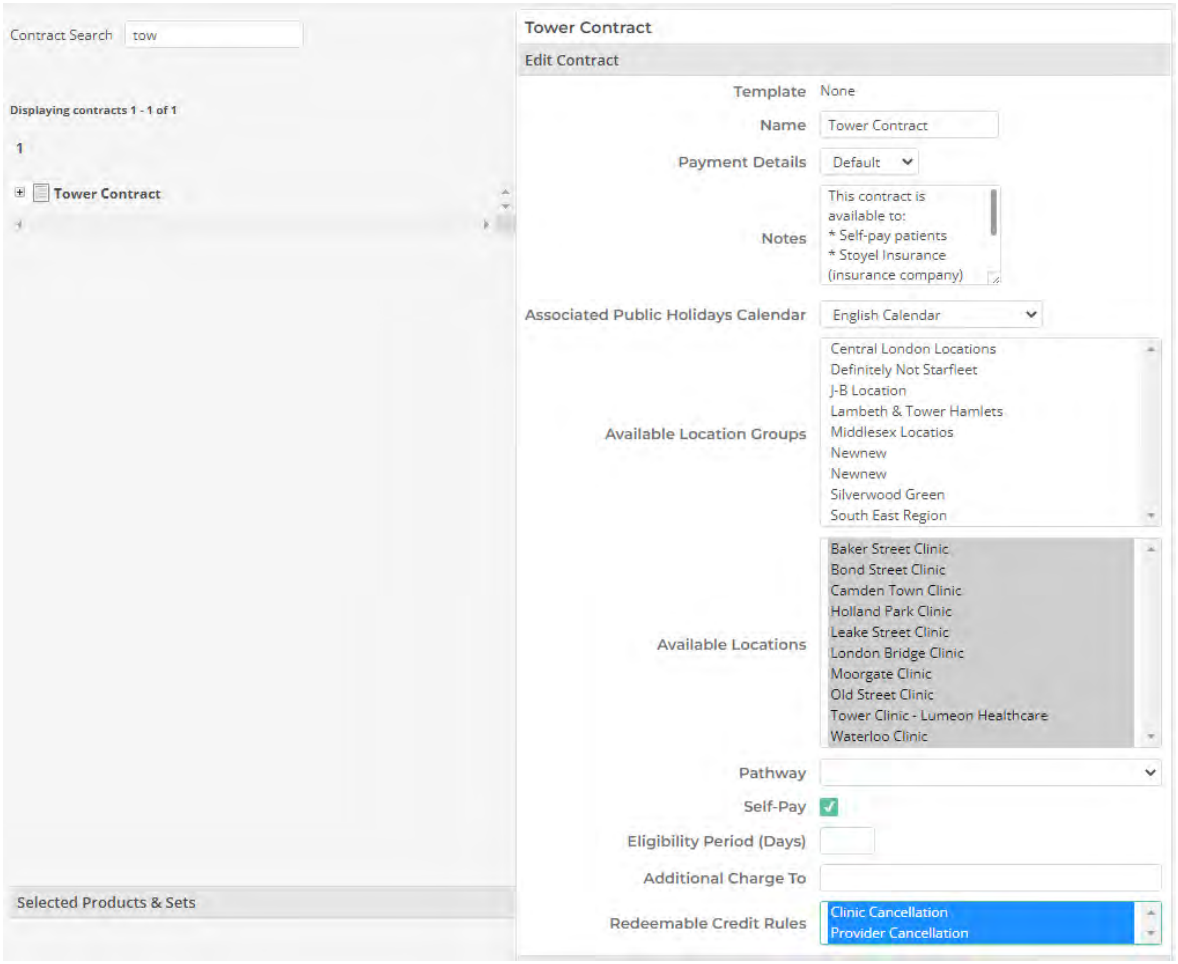
Field	Description
Name *	Enter the name of the redeemable credit rule.
Cancellation Reason *	Select the cancellation reason that triggers the rule from the drop-down list. You can create cancellation reasons in **Appt Cancel Reasons** in the **Runtime Options** menu.
Credit % *	Enter the amount that you want to discount from the patient's next appointment, provided the appointment is booked within the expiry period.
Expiry Period (days) *	Enter the number of days, following the cancelled appointment, that the patient must book the new appointment within for the payor to receive credit. Once this time period ends, Conductor removes the unused redeemable credit from the payor's account.
Appointment Type Categories *	Click in the field and select all the appointment type categories that this rule applies to. You can create appointment type categories in **Appointment Type Categories** in the **Runtime Options** menu.

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Add a redeemable credit rule to a contract

You need to add the redeemable credit rule to the appropriate contract so that you can apply it to the payor. To do this:

1. Select **Contracts** in the **Products** menu.
2. Search for the contract that you want to apply the rule to, and select the contract to display the contract details.



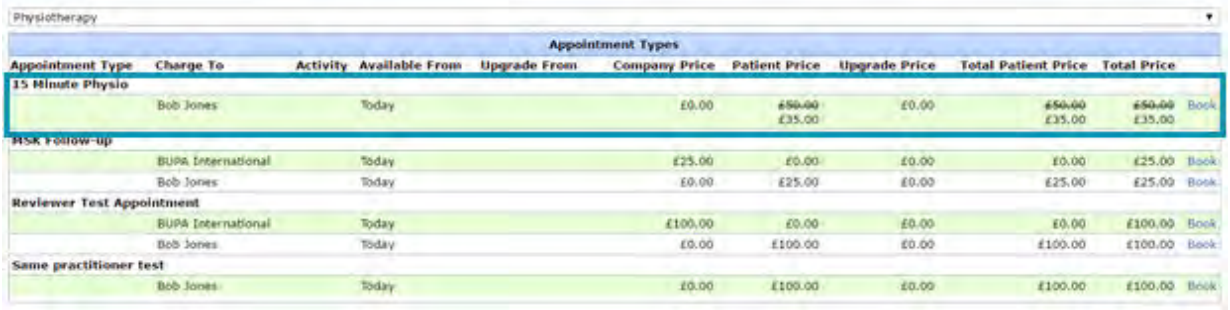
3. In the **Redeemable Credit Rules** field, select all the redeemable credit rules that you want to apply to the contract.
4. Click **Save**.

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Apply credit to a future appointment

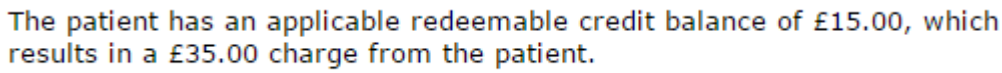
When cancelling an appointment, Conductor only applies the redeemable credit to a patient's account if the cancellation reason is the one linked to the redeemable credit rule.

When a booking agent uses the **Appointment Types** page to book another appointment for the patient, they can see that the patient has redeemable credit.



If the booking agent hovers their cursor over the price, a tooltip is displayed that contains details of the redeemable credit.

Conductor notifies the booking agent on the appointment confirmation page that the patient has an applicable redeemable credit balance which results in a discounted appointment charge,



Once the appointment has been booked, the credit appears as a payment on the patient's **Invoices & Payments** page.

When the payment has been allocated to an invoice, the credit appears as a voucher method of payment.

If the new appointment is cancelled, the redeemable credit is still available if the timeline is within the expiry deadline. If not, it is cancelled.

If a redeemable credit rule is changed during the period when the original credit was applied and the patient redeems the credit, then the rules applied are those that were active on the original cancellation transaction date.

If the available credit is more than the cost of the appointment, any remaining redeemable credit stays on the account until next redeemed or until the expiry date is reached.

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Financial tools

Accounting templates

Conductor provides a number of template files for invoices, payments, credit notes, refunds, and statements, which it uses to produce these documents.

The template files related to companies are:

- company_invoice.rtf
- company_payment.rtf
- company_refund.rtf
- CompanyStatement.rtf

The template files related to insurance companies are:

- insurance_company_invoice.rtf
- insurance_company_payment.rtf
- insurance_company_refund.rtf
- InsuranceCompanyStatement.rtf

The template files related to individual patients are:

- individual_credit_note.rtf
- individual_invoice.rtf
- individual_payment.rtf
- individual_refund.rtf
- PatientStatement.rtf

You can change or customize the template files for your organization. To download and update the template file:

1. Select **Template Files** in the **System Configuration** menu to display a list of template files.
2. Click **Download** in the row of the template file that you want to change, find the directory where you want to save the file, and click **Save** to download the file.
3. Open the file in Microsoft Word and make the required updates to the template. We recommend that you make a copy of the original template file before you make any changes to it.
4. Save the changes to the file. Make sure that you save it as an RTF (rich text format) file.

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To upload the template file:

1. Select **Template Files** in the **System Configuration** menu to display the list of template files.

2. Click **Choose file** at the bottom of the list, find the directory where the file is saved, select the file and click **Open**.

3. Click **Upload**, then click **Overwrite** to confirm that you want to overwrite the existing template file.

Accounting wizards

To run the accounting wizards, click **Wizards** in the **Accounting** menu. The following wizards are available:

- *Bulk invoice printing wizard (page 57)*
- *Bulk receipt printing wizard (page 58)*
- *Bulk statement printing wizard (page 59)*
- *Charge sweep wizard (page 60)*
- *Debt chasing wizard (page 63)*

Bulk invoice printing wizard

The bulk invoice printing wizard enables you to download settled or outstanding invoices, in bulk, ready for printing.

To do this:

1. Select **Bulk Invoice Printing Wizard** in the **Accounting Wizards** menu. **Step 1 - Select Invoices** of the bulk statement printing wizard displays.



2. Enter the details of the invoices that you want to include in the bulk invoice print and click **Next**.

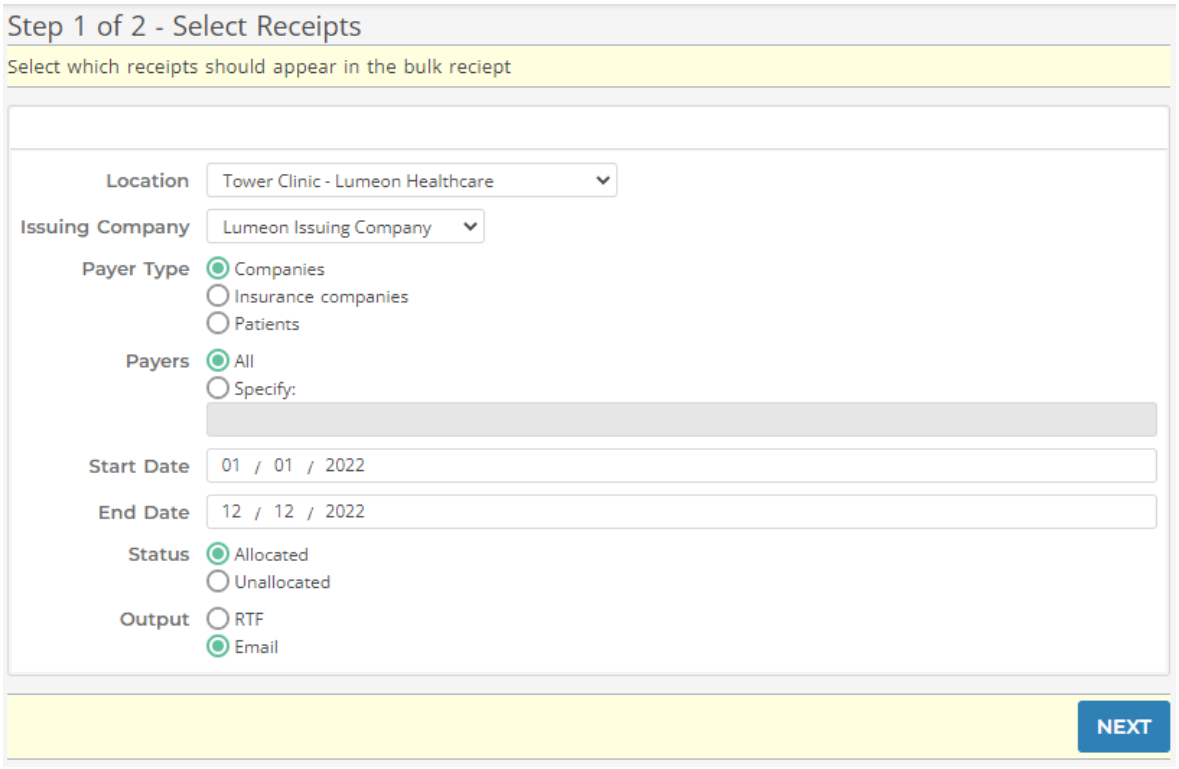
3. Confirm the selections and click **Finish** to run the bulk invoice printing wizard.

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Bulk receipt printing wizard

The bulk receipt printing wizard enables you to download receipts for patients, insurance companies, or companies, in bulk, ready for printing. To do this:

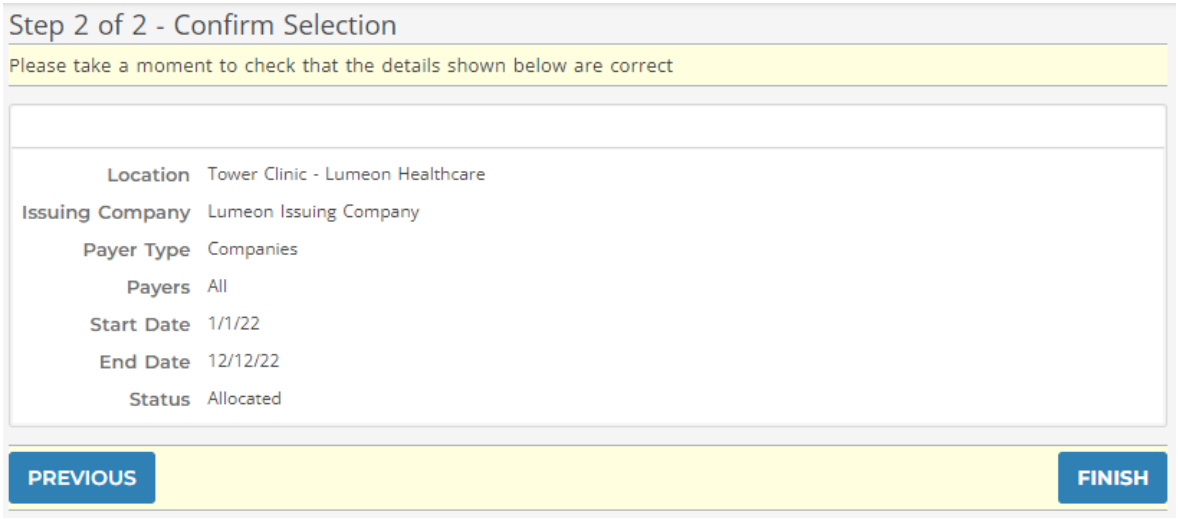
1. Select **Bulk Receipt Printing Wizard** in the **Accounting Wizards** menu. **Step 1 - Select Receipts** of the bulk receipt printing wizard displays.



2. Select a single location or select **All**.
3. Select an issuing company or select **All**.
4. Select the type of payer that you want to download or email receipts for. Select one of: **Patients**, **Insurance companies**, or **Companies**.
5. You can select all payers or select **Specify** and enter specific patients, insurance companies, or companies, depending on the payer type you selected. To do this, start typing the last name of a patient or the beginning of the insurance company or company, and select the name from the drop-down list. To enter more than one, enter a comma and a space after the name, and then start typing another name. Continue to add names as required.
6. Enter a start date and an end date.
7. Select a status. Select one of: **Allocated** or **Unallocated**.
8. Select the output type. Select one of: **RTF** or **Email**.

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9. Click **Next**. **Step 2 - Confirm Selection** of the bulk receipt printing wizard displays.

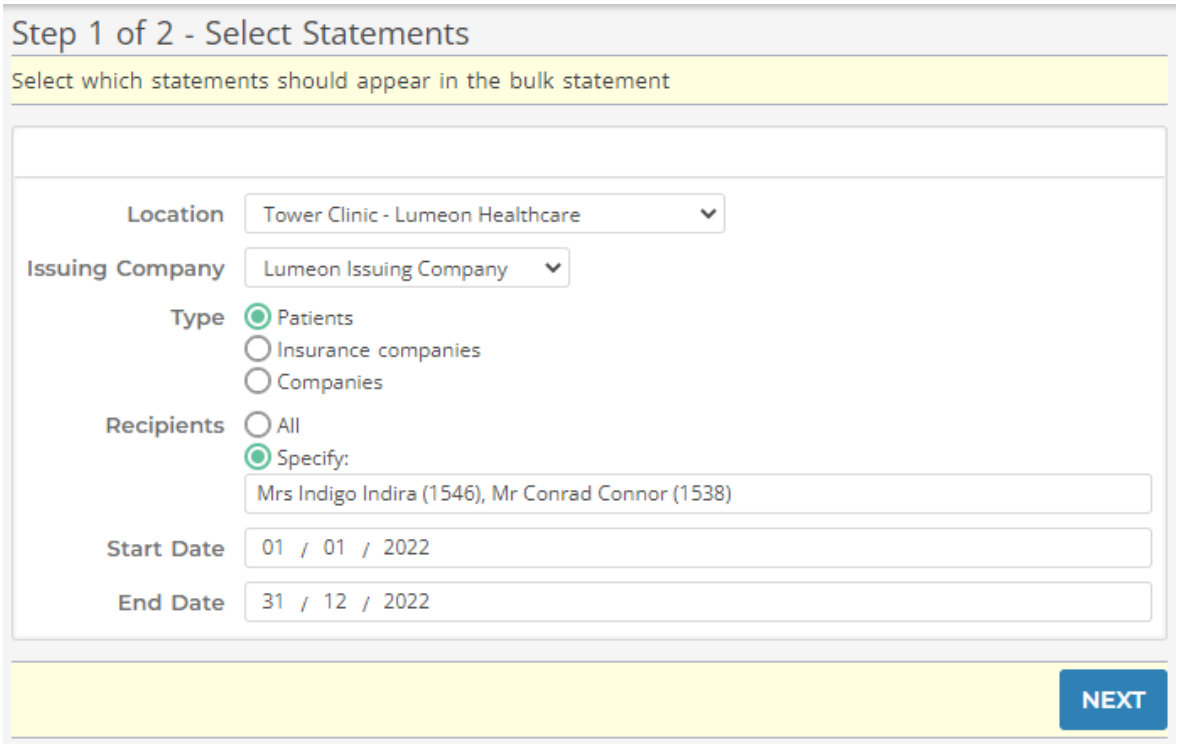


10. Check your selections and click **Finish** to run the wizard. A message displays stating that the payment receipts were delivered successfully.

Bulk statement printing wizard

The bulk statement printing wizard enables you to download or email statements for patients, companies, or insurance companies, in bulk. To do this:

1. Select **Bulk Statement Printing Wizard** in the **Accounting Wizards** menu. **Step 1 - Select Statements** of the bulk statement printing wizard displays.



2. Select a single location or select **All**.

3. Select an issuing company or select **All**.

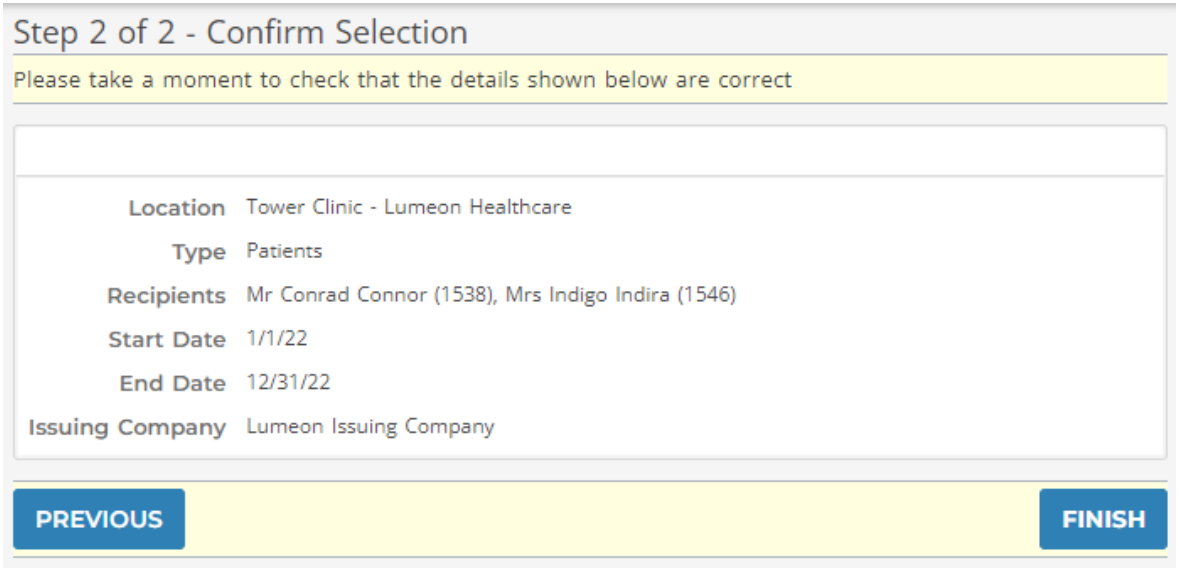
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4. Select the type of statements that you want to download or email. Select one of: **Patients**, **Insurance companies**, or **Companies**.

5. You can select all recipients or select **Specify** and enter specific patients, insurance companies, or companies, depending on the type you selected. To do this, start typing the last name of a patient or the beginning of the insurance company or company, and select the name from the drop-down list. To enter more than one, enter a comma and a space after the name, and then start typing another name. Continue to add names as required.

6. Enter a start date and an end date.

7. Click **Next**. **Step 2 - Confirm Selection** of the bulk statement printing wizard displays.



8. Check your selections and click **Finish** to run the wizard.

When the wizard has run, Conductor produces a PDF of the bulk statement which you can save and then print.

Charge sweep wizard

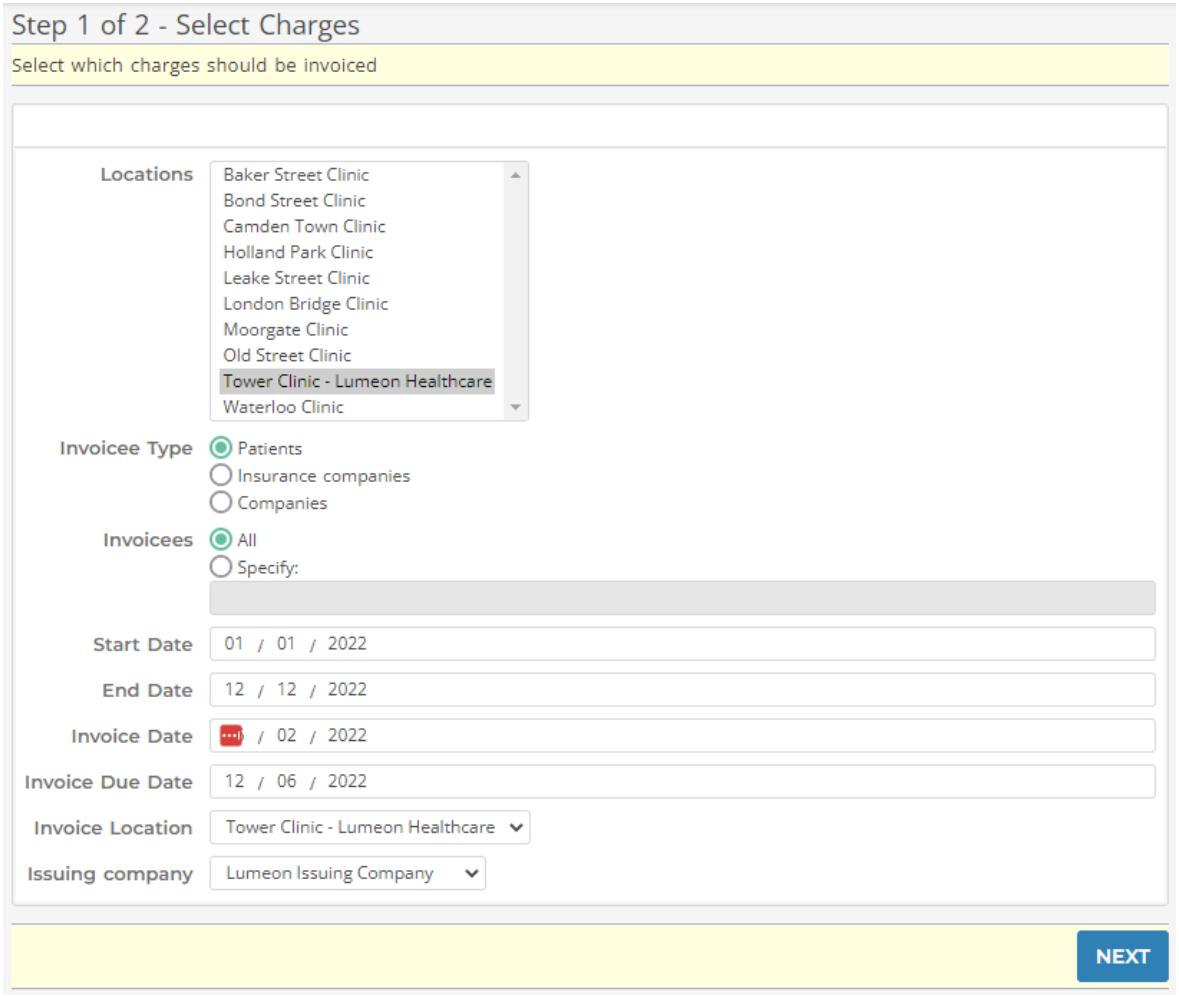
The charge sweep wizard enables you to efficiently generate invoices for large numbers of charges that have not yet been invoiced. The wizard 'sweeps up' any uninvoiced charges that meet the criteria you select and generates invoices for them. Appointments must be finished for the charges to be invoiced. This means a user must have clicked **L** in the appointment.

There is a core configuration setting which enables the wizard to solely sweep up membership charges.

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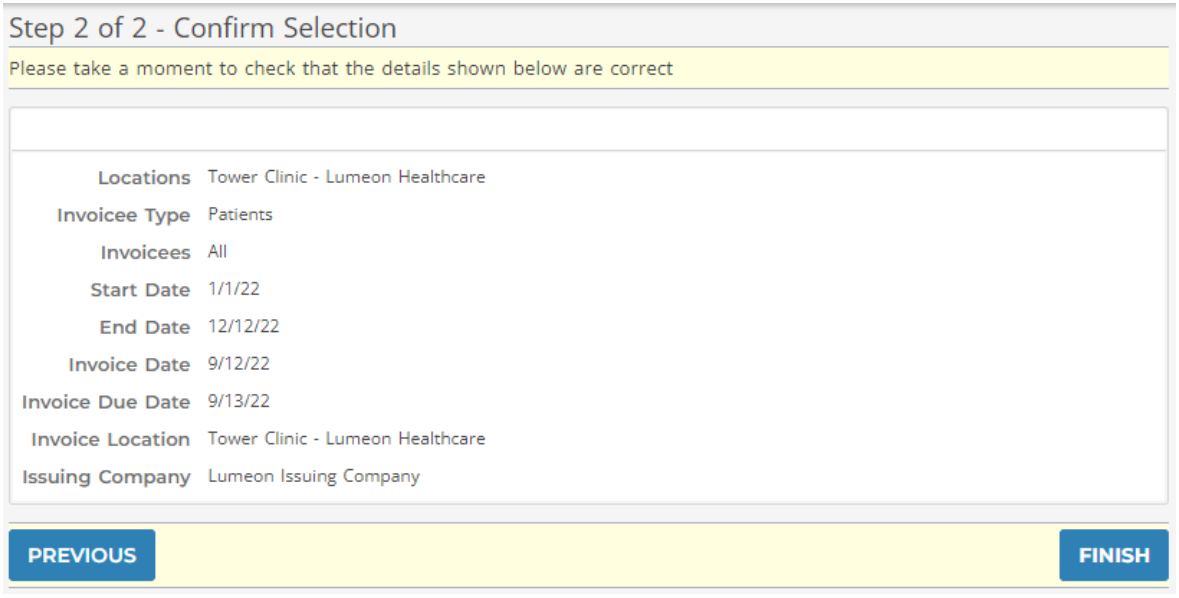
To use the charge sweep wizard:

1. Select **Charge Sweep Wizard** in the **Accounting Wizards** menu. **Step 1 - Select Charges** of the charge sweep wizard displays.



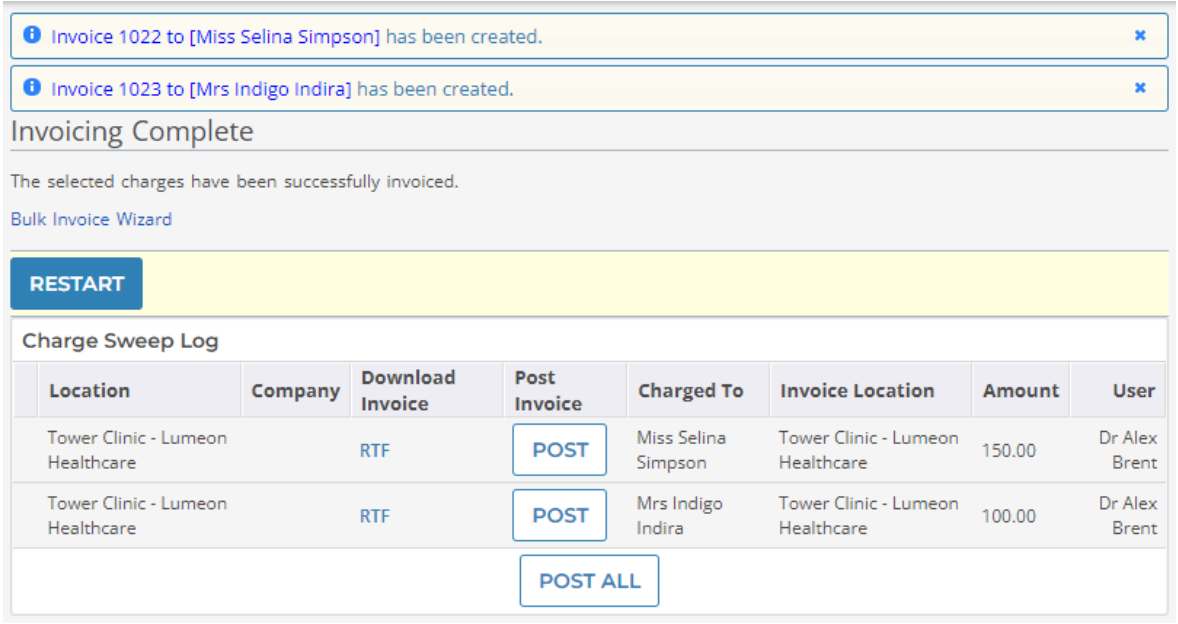
2. Enter the details using the table of charge sweep wizard fields *below (page 63)*.

3. Click **Next**. **Step 2 - Confirm Selection** of the charge sweep wizard displays.



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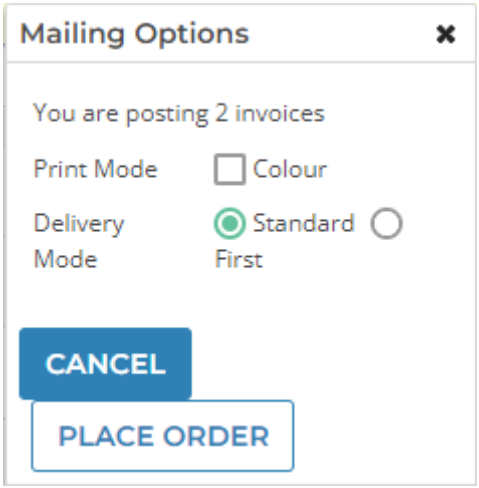
4. Check your selections and click **Finish** to run the wizard. A screen displays showing the invoices that have been created and the charge sweep log.



5. Click **Bulk Invoice Wizard** to go to the bulk invoice printing wizard to print all the invoices. See *Bulk invoice printing wizard (page 57)* for more information.

6. If your organization has an interface to a mailing system, click **Post** on any of the invoice lines to send an invoice individually or click **Post All** to send all the invoices.

7. Clicking **Post** or **Post All** displays the **Mailing Options** window. Select whether you want to print in colour and whether you want standard or first class delivery. Click **Place Order** to send the invoices to the mailing system.



8. Alternatively, click **Restart** to go back to step 1 of the charge sweep wizard.

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Charge sweep wizard fields

Use the following table to complete the charge sweep wizard details. Some fields only display if you select **Companies** in the **Invoicee Type** field.

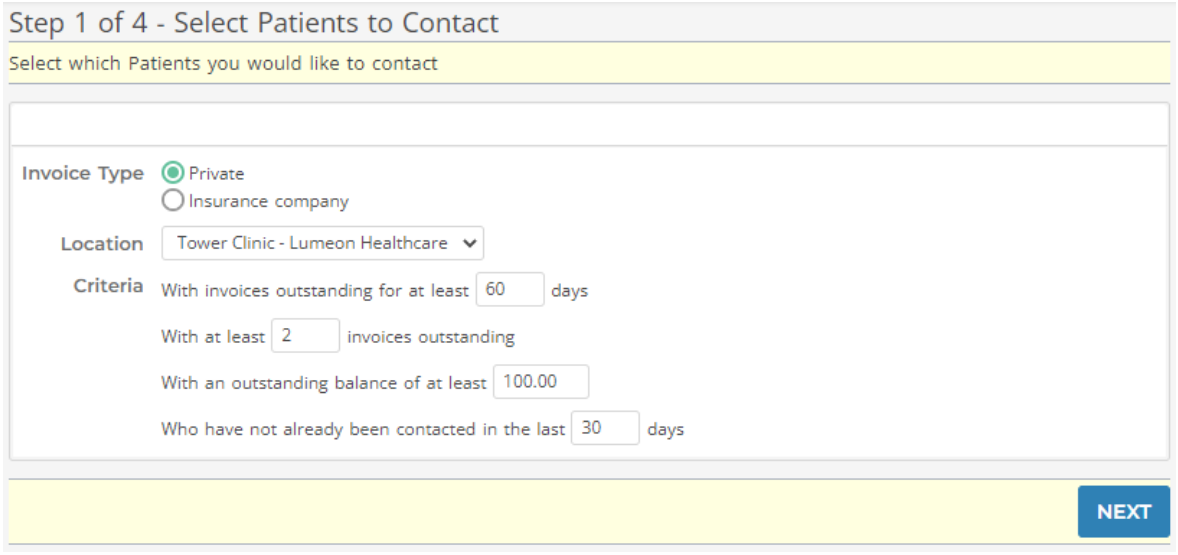
Field	Description
Locations	Select one or more locations at which the charges have been raised. Use **Ctrl** and click to select more than one location in the list.
Invoicee Type	Select whether to invoice patients, insurance companies or companies. Only charges raised against the selected invoicee are picked up.
Invoicees	Select all invoicees or click **Specify** and enter specific patients, insurance companies, or companies, depending on the invoicee type you selected. To do this, start typing the last name of a patient or the beginning of the insurance company or company, and select the name from the drop-down list. To enter more than one, enter a comma and a space after the name, and then start typing another name. Continue to add names as required.
Company Start Date	For companies only. Use as a filter to generate invoices for companies from that start date.
Billing Start Date	For companies only. Use as a filter to generate invoices for companies only with that billing start date.
Billing Frequency	For companies only. Use as a filter to generate invoices for companies only with that billing frequency.
Start Date	Enter a start date to provide a date range that charges were raised within.
End Date	Enter an end date to provide a date range that charges were raised within.
Invoice Date	Enter the date to display on the invoice.
Invoice Due Date	Enter the date that the invoice is due to be paid.
Invoice Location	Select the location to display on the invoice.
Issuing Company	Select the issuing company to issue the invoices from.

Debt chasing wizard

The debt chasing wizard enables you to search for patients who have outstanding charges that meet the criteria that you specify. You can select how to contact these patients and set up the appropriate SMS, email, and letter templates.

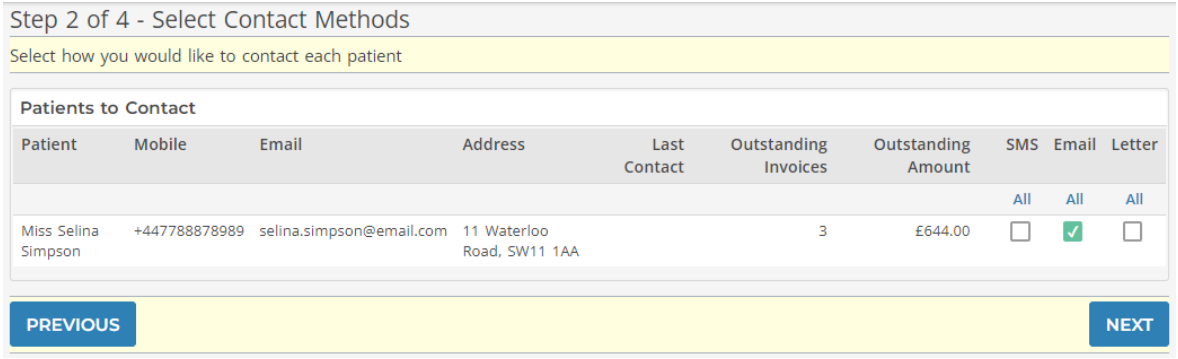
To use the debt chasing wizard:

1. Select **Debt Chasing Wizard**. in the **Accounting Wizards** menu. **Step 1 - Select Patients to Contact** of the debt chasing wizard displays.



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2. Select the invoice type. Select either **Private** or **Insurance company**.
3. Select all locations or select a specific location.
4. Select the criteria for the outstanding charges you want to chase:
   - Number of days outstanding
   - Number of invoices outstanding
   - Minimum outstanding balance
   - Minimum length of time since the invoicee was last contacted.
5. Click **Next**. **Step 2 - Select Contact Methods** of the debt chasing wizard displays.



6. Select how you want to contact each patient by selecting one or more of the **SMS**, **Email**, or **Letter** check boxes. You can also use **All** at the top of the column to select that contact method for all patients. You can contact a patient by more than one method.

   You cannot select a contact method if the required mobile phone, email, or address is missing for that patient. For example, if a patient does not have an email address, the email check box is grey for that patient and you cannot select it. You cannot select SMS for any patients if this functionality is not configured for your organization. Contact Lumeon Support if you do not have access to SMS functionality and would like to use this feature.
7. Click **Next**. **Step 3 - Specify Message Text** of the debt chasing wizard displays.
8. Update the SMS, email, and/or letter text depending on the contact methods selected previously. See:
   - *Debt chasing SMS templates (page 65)* to update an SMS template.
   - *Debt chasing email templates (page 66)* to update an email template.
   - *Debt chasing letter templates (page 68)* to update a letter template.
9. Click **Next**. **Step 4 - Confirm Selection** of the debt chasing wizard displays.
10. Check the details of sample message(s) and the contact methods for each patient, then click **Finish**.

Conductor automatically sends SMS and emails to the recipients.

You can print or download letters from the **Bulk Letter Printing** page - see *Use bulk letter printing (page 72)*. Contact Lumeon Support if you do not have access to bulk letter printing and would like to use this feature.

Letters also appear in the patients' accounts from where you can download and print them.

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Debt chasing templates

In the debt chasing wizard, you can set up SMS, email, and letter templates.

Debt chasing SMS templates

Conductor provides two default debt chasing SMS templates:

- **Debt Chasing - Private** - for patients
- **Debt Chasing - Insurance** - for insurance companies

You can edit debt chasing SMS templates in two ways:

- *SMS templates (page 65)*
- *Debt chasing wizard (page 66)*

Use SMS templates

You can edit the default debt chasing SMS templates using the **SMS Templates** option before running the debt chasing wizard. Updating an SMS template here, saves the changes, and displays the latest version of the template in the debt chasing wizard.

To edit an SMS template:

1. Select **SMS Templates** in the **Communication** or **Pathway Logic** menus.
2. Start typing **Debt Chasing** in the **Name** field and select either the **Debt Chasing - Insurance** or the **Debt Chasing - Private** template. Alternatively, use the controls at the bottom of the templates table to find the correct template and select it.
3. Update the SMS template, if required. See ***SMS Messages in Lumeon Conductor*** for information on creating and editing SMS templates.

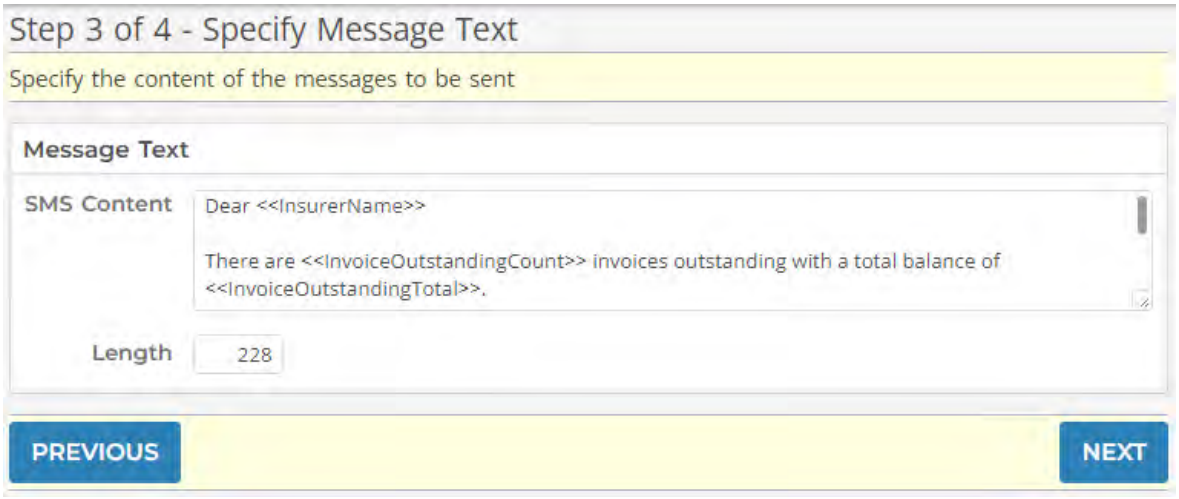
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Use debt chasing wizard

You can also edit the default debt chasing SMS template in the debt chasing wizard for the invoice type you have chosen (private or insurance company). These changes update the template for this run of the debt chasing wizard only and do not update the default SMS template.

To edit the debt chasing SMS template using the debt chasing wizard:

1. In **Step 3 - Specify Message Text** of the debt chasing wizard, the information from the default SMS template displays. This is either the **Debt Chasing - Insurance** or **Debt Chasing - Private** template depending on the invoice type you selected.



2. Update the SMS content, if necessary. Include merge tags from the list in *SMS template merge tags (page 66)*, if required.

SMS template merge tags

You can use the following merge tags in the debt chasing SMS templates:

- <<RecipientSalutation>>
- <<InsurerName>>
- <<InvoiceOutstandingCount>>
- <<InvoiceOutstandingDays>>
- <<InvoiceOutstandingTotal>>

Debt chasing email templates

Conductor provides two default debt chasing email templates:

- **Debt Chasing - Private** - for patients
- **Debt Chasing - Insurance** - for insurance companies

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You can edit these debt chasing email templates in two ways:

- *Email templates (page 67)*
- *Debt chasing wizard (page 67)*

Use email templates

You can edit the default debt chasing emails using the **Email Templates** option before running the debt chasing wizard. Updating an email template here, saves the changes, and displays the latest version of the template in the debt chasing wizard.

To edit an email template:

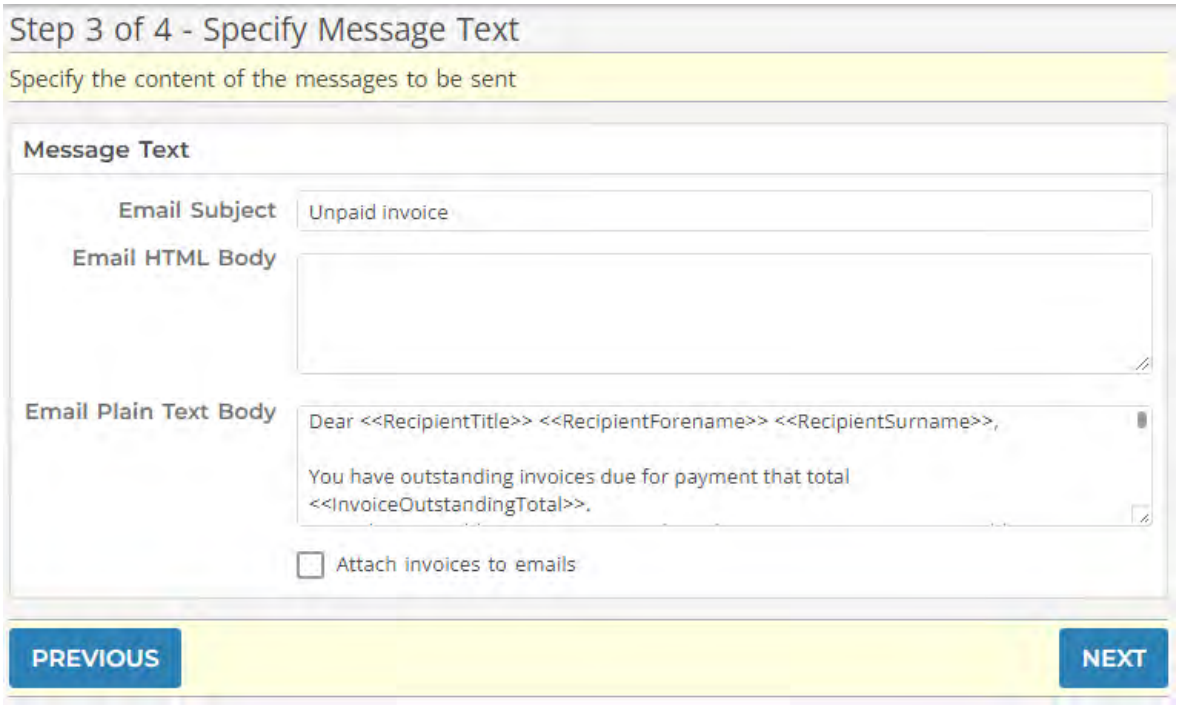
1. Select **Email Templates** in the **Communication** or **Pathway Logic** menus.
2. Start typing **Debt Chasing** in the **HTML Template** field and select either the **Debt Chasing - Insurance** or the **Debt Chasing - Private** template.
3. Update the email template, adding CSS or HTML if required. See ***Letter & Email Templates in Lumeon Conductor*** for information on creating and editing email templates.

Use debt chasing wizard

You can also edit the default debt chasing email template in the debt chasing wizard for the invoice type you have chosen (private or insurance company). You cannot add CSS to customize the email template here. These changes update the template for this run of the debt chasing wizard only and do not update the default email template.

To edit the debt chasing email template using the debt chasing wizard:

1. In **Step 3 - Specify Message Text** of the debt chasing wizard, the information from the default email template displays. This is either the **Debt Chasing - Insurance** or **Debt Chasing - Private** template depending on the invoice type you selected.



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2. Make changes to this if required using the table in *Email template fields in debt chasing wizard (page 68)* below. Include merge tags from the list in *Email template merge tags (page 68)*, if required.

Email template fields in debt chasing wizard

Use the following table to update the email template.

Email Subject	Enter or update the subject of the email.
Email HTML Body	Enter or update the main email text in HTML.
Email Plain Text Body	Enter or update the main email text in plain text.
Attach invoices to emails	Select to attach copies of the outstanding invoices to the emails.

Email template merge tags

You can use the following merge tags in the **Email HTML Body** and **Email Plain Text Body** fields:

- <<RecipientForename>>
- <<RecipientSurname>>
- <<RecipientSalutation>>
- <<InsurerName>>
- <<InvoiceOutstandingDays>>
- <<InvoiceOutstandingCount>>
- <<InvoiceOutstandingTotal>>

Debt chasing letter templates

Conductor provides two default debt chasing letter templates:

- **Debt Chasing - Private** - for patients
- **Debt Chasing - Insurance** - for insurance companies

You can edit debt chasing letter templates in two ways:

- *Letter templates (page 69)*
- *Debt chasing wizard (page 70)*

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Use letter templates

You need to upload a debt chasing template as an RTF file. To do this:

1. Create the RTF file to be uploaded. You can use the merge tags in *Template file merge tags (page 71)* in the RTF file. You must insert the merge tag **<<body_text>>** where you want the main content of the letter to appear.

<<created_long>>

<<patient_title>> <<patient_forename>> <<patient_surname>>
<<patient_address>>

Dear <<patient_title>> <<patient_surname>> ,

<<body_text>>

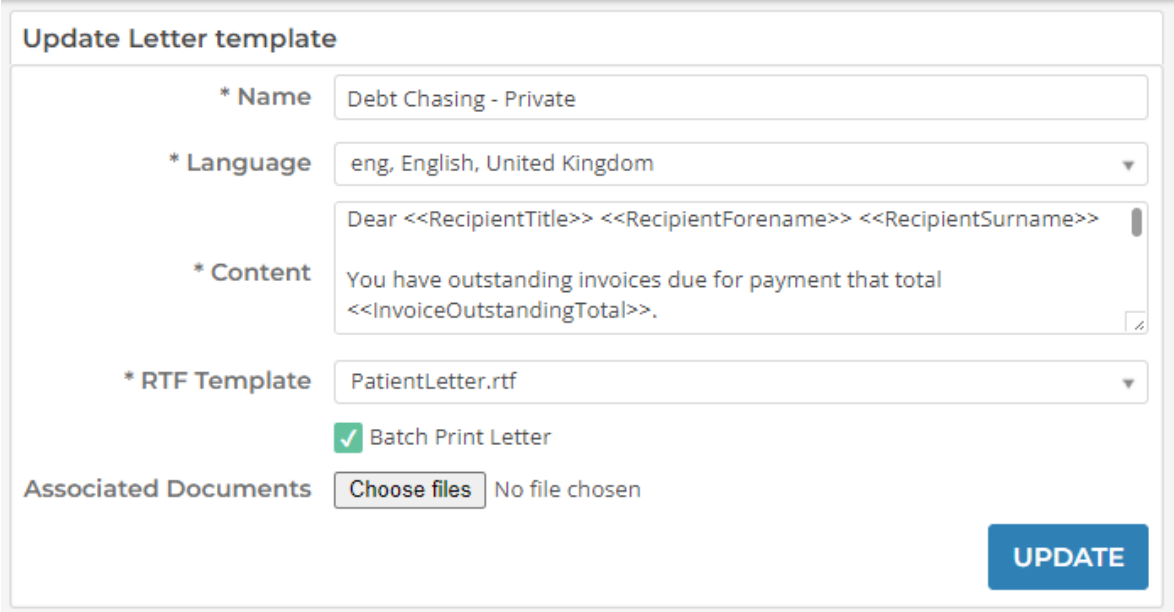
Yours sincerely,
<<sender_title>> <<sender_forename>> <<sender_surname>>
<<sender_job_title>>

2. Select **Template Files** in the **System Configuration** menu to upload the RTF file.

You can edit the default debt chasing letter templates using the **Letters** option before running the debt chasing wizard. Updating the content of a letter template here, saves the changes, and displays the latest version of the template in the debt chasing wizard.

To edit a letter template:

1. Select **Letters** in the **Communication** menu.
2. Select either the **Debt Chasing - Insurance** or **Debt Chasing - Private** template.



3. Update the **Content** field of the letter template. This appears where the merge tag **<<body_text>>** occurs in the RTF template file. You can use the merge tags in *Letter template merge tags (page 71)* in the body text, if required.

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4. Select the correct RTF template file from the drop-down list.

5. Select **Batch Print Letter** if you want to include letters using this template to be batch printed.

6. Add any associated documents that you want to have attached to the letter.

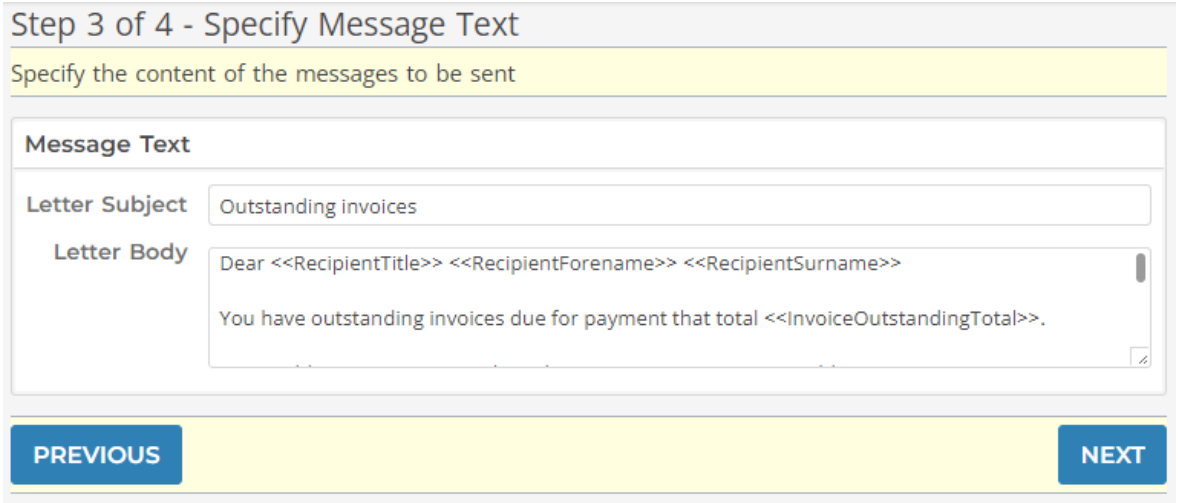
See ***Letter & Email Templates in Lumeon Conductor*** for information on uploading letter template files as well as creating and editing letter templates.

Use debt chasing wizard

You can also edit the default debt chasing letter template in the debt chasing wizard for the invoice type you have chosen (private or insurance company). These changes update the template for this run of the debt chasing wizard only and do not update the default letter template.

To edit the debt chasing letter template using the debt chasing wizard:

1. In **Step 3 - Specify Message Text** of the debt chasing wizard, the information from the default letter template displays. This is the **Content** field from either the **Debt Chasing - Insurance** or **Debt Chasing - Private** template depending on the invoice type you selected.



2. Make changes to the subject and body of the letter if required. You can use the merge tags in *Letter template merge tags (page 71)* in the **Letter Body** field, if required.

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Template file merge tags

You can use the following merge tags in the RTF letter file:

<<patient_id>>	<<gp_surname>>
<<patient_title>>	<<gp_address>>
<<patient_forename>>	<<gp_address_long>>
<<patient_surname>>	<<rand_no>>
<<patient_postcode>>	<<screen_no>>
<<patient_address>>	<<insurance_company>>
<<patient_address_long>>	<<insurance_company_balance>>
<<patient_address_long_no_pc>>	<<created>>
<<patient_dob>>	<<created_long>>
<<patient_balance>>	<<policy_number>>
<<patient_telephone_day>>	<<employee_reference>>
<<patient_telephone_evening>>	<<fail_reason>>
<<patient_telephone_mobile>>	<<ibs_index>>
<<patient_email>>	<<ibs_booking_id>>
<<patient_sex>>	<<recipient_title>>
<<patient_nhs_number>>	<<recipient_forename>>
<<patient_telephone_best>>	<<recipient_surname>>
<<patient_preferred_location_address_long>>	<<recipient_address>>
<<patient_preferred_location_fax_number>>	<<sender_title>>
<<patient_preferred_location_name>>	<<sender_forename>>
<<patient_preferred_location_telephone_number>>	<<sender_surname>>
<<gp_title>>	<<sender_job_title>>
<<gp_forename>>	

Letter template merge tags

You can use the following merge tags in the Content of debt chasing letter templates:

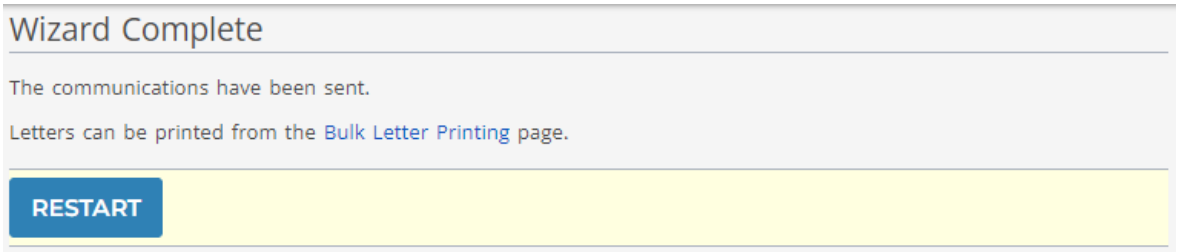
- <<InsurerName>>
- <<InvoiceOutstandingDays>>
- <<InvoiceOutstandingCount>>
- <<InvoiceOutstandingTotal>>

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Use bulk letter printing

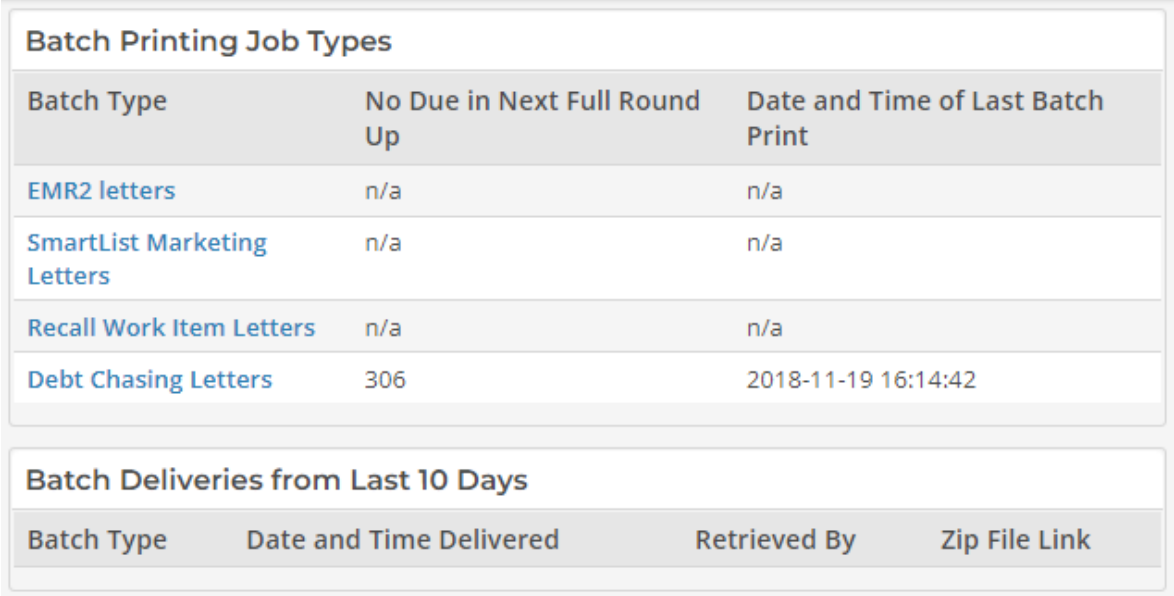
The bulk letter printing feature enables you to download multiple documents in one document. To use bulk letter printing:

1. If you have just run the debt chasing wizard and have selected to contact patients by letter, click **Bulk Letter Printing** on the **Wizard Complete** page.



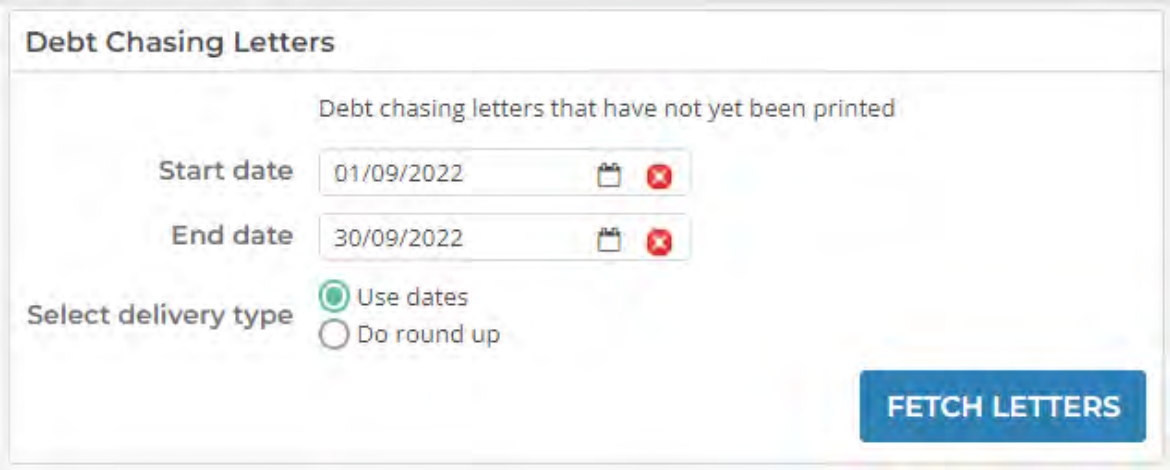
2. Alternatively, select **Bulk Letter Printing** in the **Communication** menu.

3. The **Batch Printing Job Types** page displays. Select the batch type you want to print.



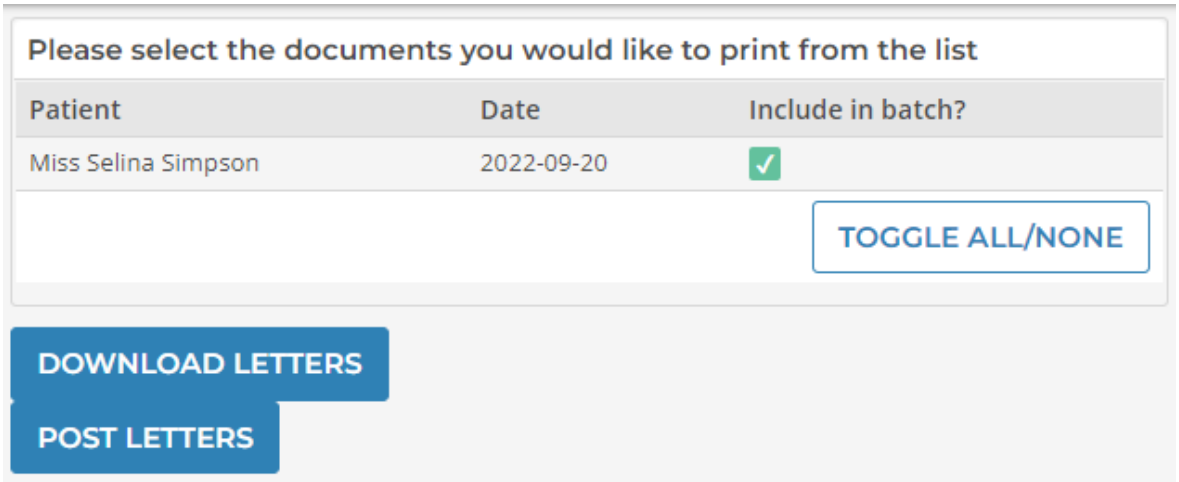
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4. On the **Debt Chasing Letters** page, to print letters within a date range, enter the start and end dates or select them using the calendar icon and select **Use dates**. If you want to print all unprinted letters of the specified type, leave the dates blank and select **Do round up**.



5. Click **Fetch Letters**.

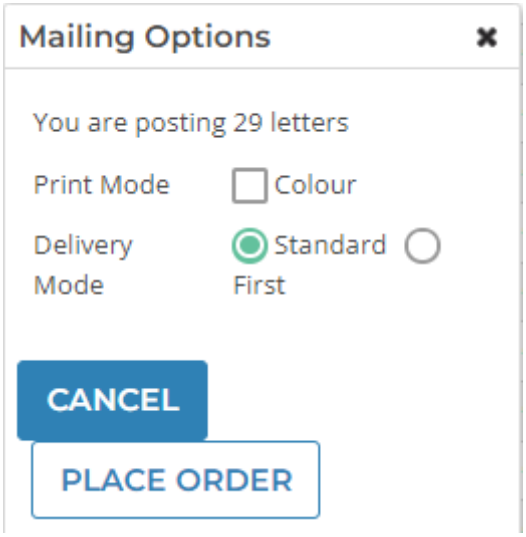
6. On the document selection page, you can use the **Toggle All/None** button to clear or select all the documents, and you can clear or select individual letters in the bulk print.



7. When you have selected the required letters, click **Download Letters** to download them as a zip file containing all the letters. If your organization has an interface to a mailing system, you can click **Post Letters** to post them.

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8. Clicking **Post Letters** displays the **Mailing Options** window. Select whether you want to print in colour and whether you want standard or first class delivery. Click **Place Order** to send the letters to the mailing system.



Aged debtors

You can view invoiced and uninvoiced charges by the length of time that the debt is overdue. The aged debtors report shows all insurance companies, companies, and a line of the total charges for all individuals. You can view this for a single location or all locations.

The aged debtors report supports time shifting which means that, provided you use appropriate period locks, you can extract the data at any time and the totals do not change. The period allocations may move but, although allocations may change, the total position does not change. If the debtor position does change, this is because users are back dating activity which is only possible if given the appropriate permissions and system locks are not used.

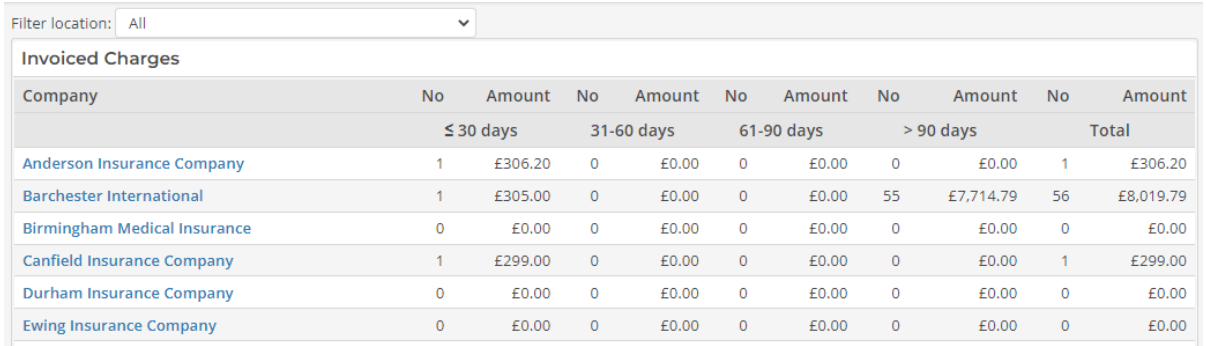
To view aged debtors:

1. Select **Aged Debtors** in the **Accounting** menu.

2. Leave the **Filter location** option as **All** or select a location.

The aged debtors report displays tables of:

- **Invoiced Charges** - Lists of insurance companies, then companies, and then a total charge for all individuals.

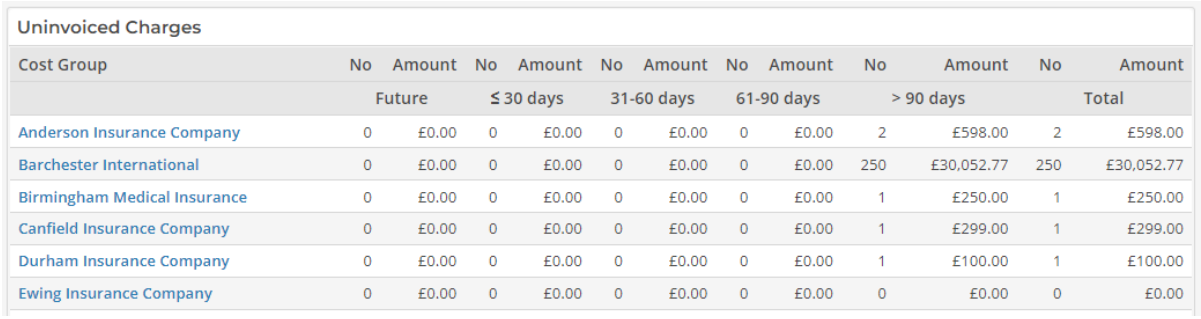

Filter location: All

Invoiced Charges

Company	No	Amount	No	Amount	No	Amount	No	Amount	No	Amount
	≤ 30 days		31-60 days		61-90 days		> 90 days		Total	
Anderson Insurance Company	1	£306.20	0	£0.00	0	£0.00	0	£0.00	1	£306.20
Barchester International	1	£305.00	0	£0.00	0	£0.00	55	£7,714.79	56	£8,019.79
Birmingham Medical Insurance	0	£0.00	0	£0.00	0	£0.00	0	£0.00	0	£0.00
Canfield Insurance Company	1	£299.00	0	£0.00	0	£0.00	0	£0.00	1	£299.00
Durham Insurance Company	0	£0.00	0	£0.00	0	£0.00	0	£0.00	0	£0.00
Ewing Insurance Company	0	£0.00	0	£0.00	0	£0.00	0	£0.00	0	£0.00

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- **Uninvoiced Charges** - Lists of insurance companies, then companies, and then a total charge for all individuals.

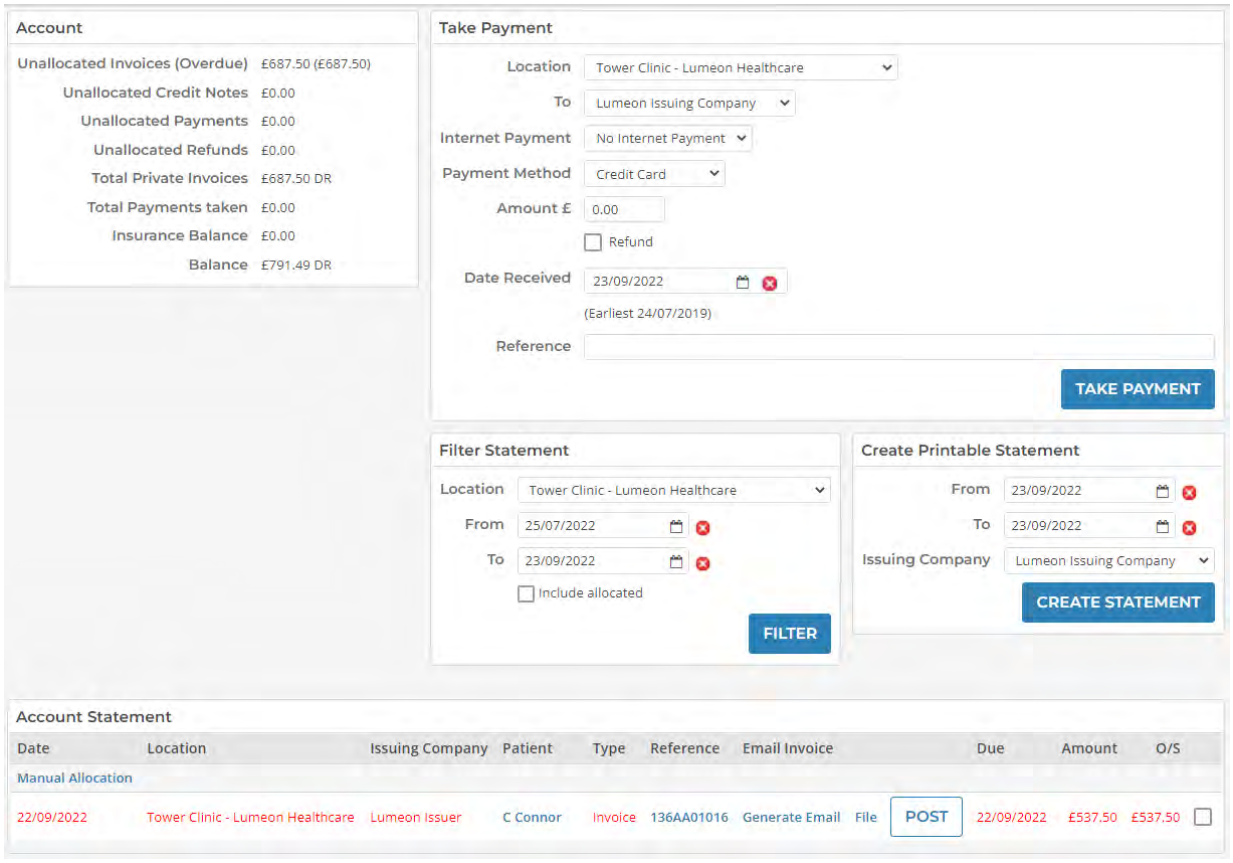


Uninvoiced Charges

Cost Group	No	Amount	No	Amount	No	Amount	No	Amount	No	Amount	No	Amount
	Future		≤ 30 days		31-60 days		61-90 days		> 90 days		Total	
Anderson Insurance Company	0	£0.00	0	£0.00	0	£0.00	0	£0.00	2	£598.00	2	£598.00
Barchester International	0	£0.00	0	£0.00	0	£0.00	0	£0.00	250	£30,052.77	250	£30,052.77
Birmingham Medical Insurance	0	£0.00	0	£0.00	0	£0.00	0	£0.00	1	£250.00	1	£250.00
Canfield Insurance Company	0	£0.00	0	£0.00	0	£0.00	0	£0.00	1	£299.00	1	£299.00
Durham Insurance Company	0	£0.00	0	£0.00	0	£0.00	0	£0.00	1	£100.00	1	£100.00
Ewing Insurance Company	0	£0.00	0	£0.00	0	£0.00	0	£0.00	0	£0.00	0	£0.00

Invoiced charges for an insurance company or company

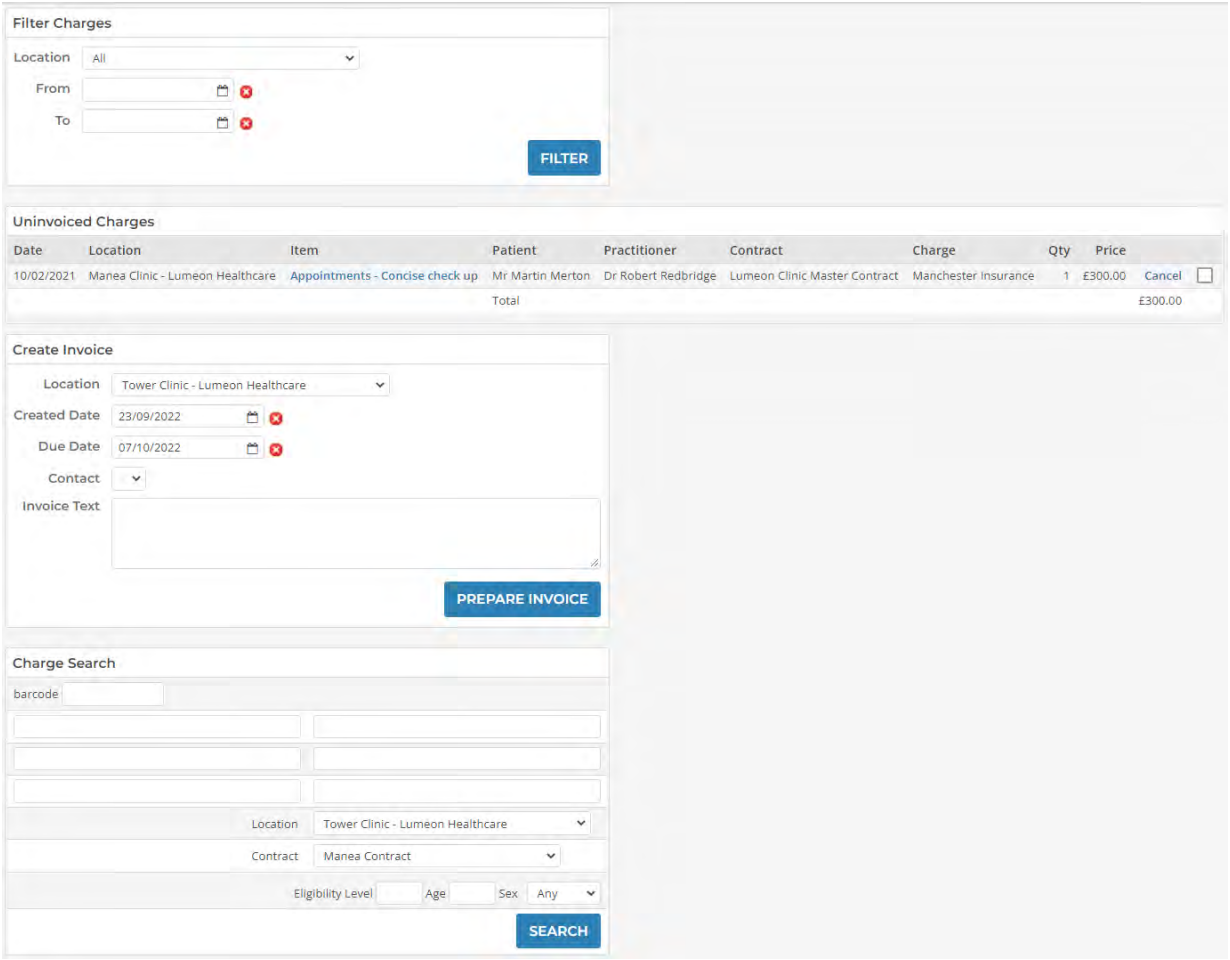
Select an insurance company or company in the **Invoiced Charges** table to display the invoicing and payments page. You can take a payment, create a printable statement, and download or mail an invoice - see *Payments (page 11)* for more information.



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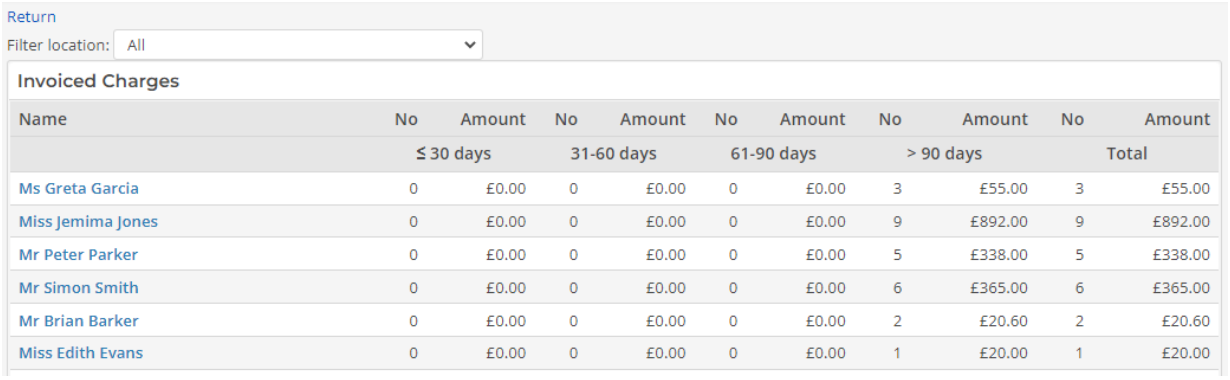
Uninvoiced charges for an insurance company or company

Select an insurance company or company in the **Uninvoiced Charges** table to display the charges page. You can create invoices or add charges - see *Prepare and create invoices (page 15)* and *Charges (page 11)* for more information.



Individual patients

Select the **Individuals** row to display a table of all patients with invoiced charges and another table of all patients with uninvoiced charges.



Name	No	Amount	No	Amount	No	Amount	No	Amount	No	Amount
	≤ 30 days		31-60 days		61-90 days		> 90 days		Total	
Ms Greta Garcia	0	£0.00	0	£0.00	0	£0.00	3	£55.00	3	£55.00
Miss Jemima Jones	0	£0.00	0	£0.00	0	£0.00	9	£892.00	9	£892.00
Mr Peter Parker	0	£0.00	0	£0.00	0	£0.00	5	£338.00	5	£338.00
Mr Simon Smith	0	£0.00	0	£0.00	0	£0.00	6	£365.00	6	£365.00
Mr Brian Barker	0	£0.00	0	£0.00	0	£0.00	2	£20.60	2	£20.60
Miss Edith Evans	0	£0.00	0	£0.00	0	£0.00	1	£20.00	1	£20.00

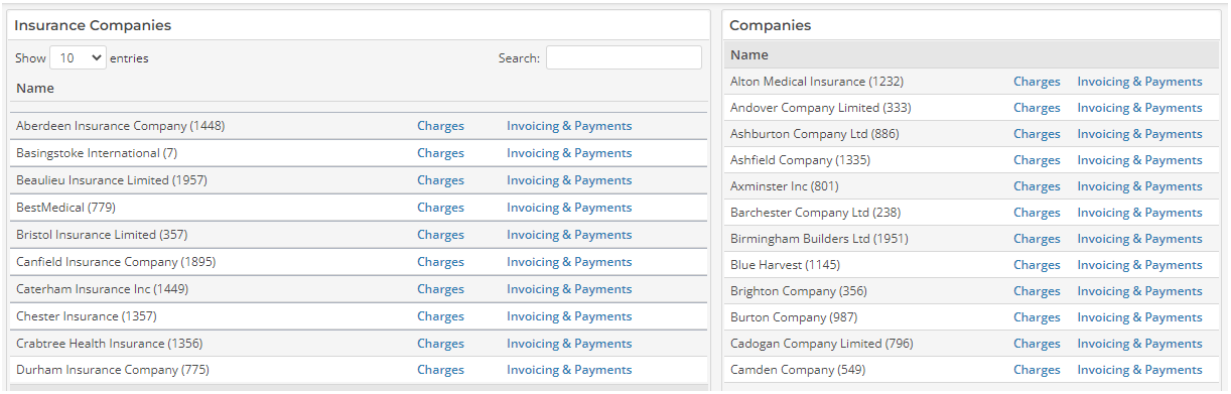
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If you select a patient in the **Invoiced Charges** table, Conductor displays the **Invoices & Payments** page for the patient.

If you select a patient in the **Uninvoiced Charges** table, Conductor displays the **Charges** page for the patient.

Company accounts

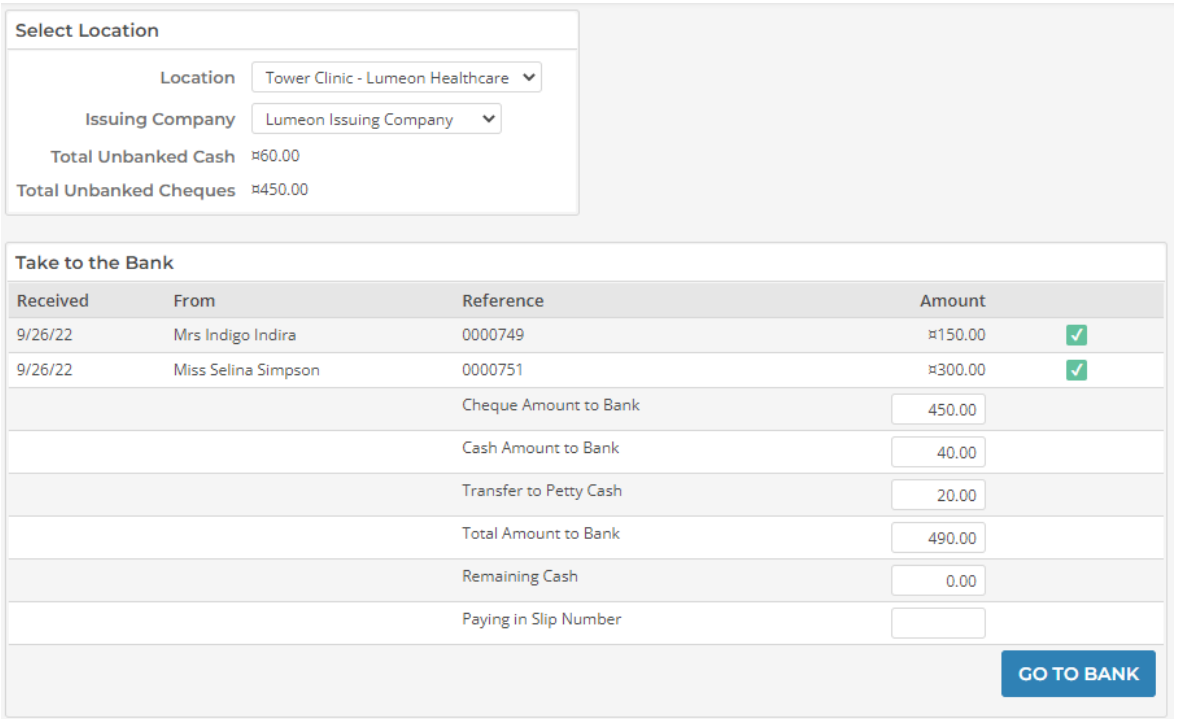
The company accounts page provides an overview of all companies and insurance companies, and the opportunity to see their charges, invoices, and payments associated with them. To view the company accounts, select **Company Accounts** in the **Accounting** menu.



Go to bank

To record an audit trail of unbanked cash and cheques being taken to the bank:

1. Select **Go To Bank** in the **Accounting** menu to display the **Go To Bank** page.



2. Change the location, if required.

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3. Select the cheques that you are taking to the bank. This automatically adjusts the **Cheque Amount to Bank** and **Total Amount to Bank** fields.

4. Enter the cash you are taking to the bank, and the cash to be transferred to petty cash. This automatically adjusts the **Total Amount to Bank** and **Remaining Cash** fields.

5. Enter the paying in slip number.

6. Click **Go to Bank**.

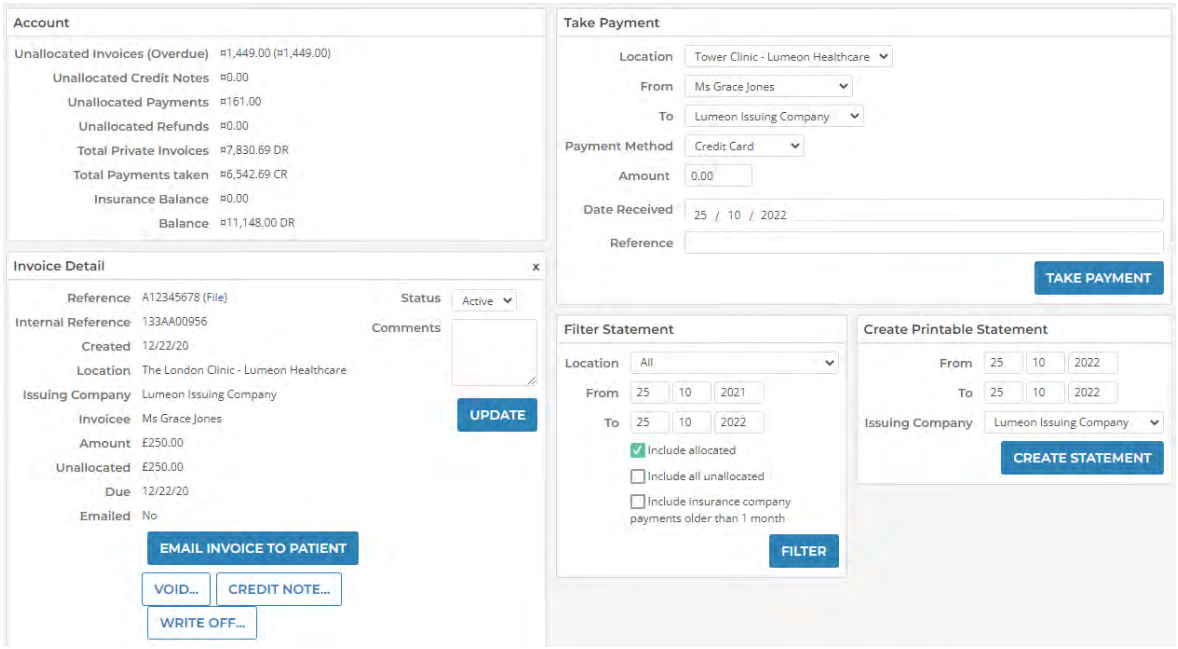
Invoice search

You can search for an invoice number. To do this:

1. Select **Invoice Search** in the **Accounting** menu to display the **Invoice Search** page.



2. Enter the invoice number you are looking for and click **Search**. This displays the details of the patient and the invoice.



Issuing companies

You can set up issuing companies if your organization has multiple trading entities. For example, if a clinic has several practitioners, some of whom work directly for the clinic, and others who are sole traders or limited companies and run their accounts externally to the clinic. In this case, Conductor can issue invoices and receive payments and invoices on behalf of the individual practitioners. These are separate from one another and from the clinic itself.

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To set up a trading entity for a practitioner, you must:

1. *Set up a practitioner to issue their own invoices* *(page 79)*
2. *Create issuing company templates* *(page 79)*
3. *Set up an issuing company* *(page 80)*

You can also:

- *Assign issuing companies to locations* *(page 81)*
- *Assign issuing companies to products* *(page 82)*

Set up a practitioner to issue their own invoices

To set up a practitioner to issue their own invoices:

1. Select **Practitioners** in the **People** menu.
2. Select the practitioner that you want to set up the issuing company for.
3. Select **Issues own invoices** and click **Update**. This feature is controlled by a core configuration parameter. Contact Lumeon Support if you cannot see this checkbox and want to set up different issuing companies.

Create issuing company templates

If you want the practitioner to have their own templates, rather than using the ones for your organization, you must create them. To do this:

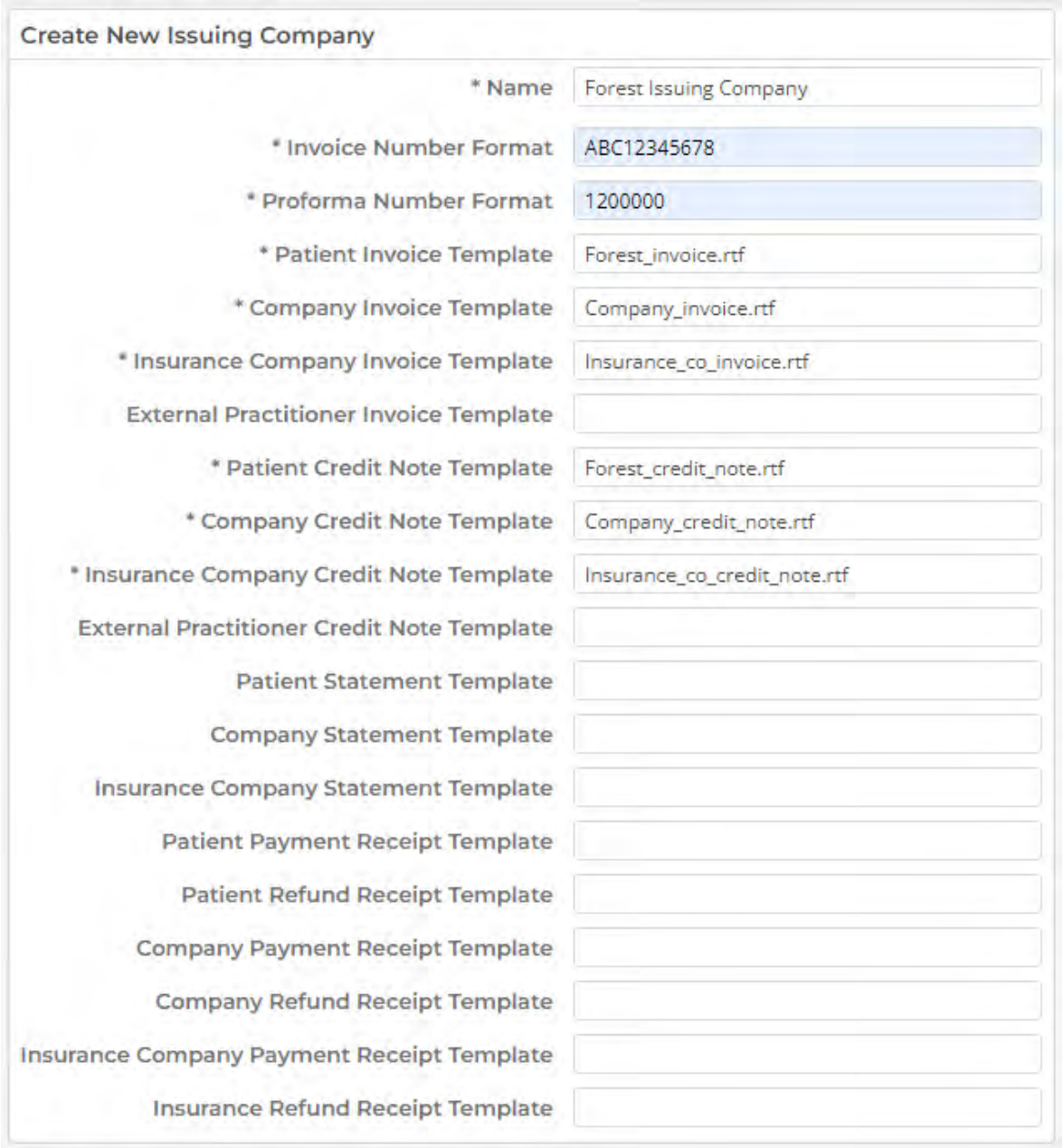
1. Create the invoice template files for the practitioner as an `.rtf` file. You may also want to create other template files for credit notes, statements, and receipts.
2. Select **Template Files** in the **System Configuration** menu.
3. If you want to create a separate directory for this invoice template file, enter the name of the directory and click **Create Directory**.
4. Click **Choose file**, navigate to the file on your computer, select it, and click **Upload**.

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Set up an issuing company

To set up an issuing company:

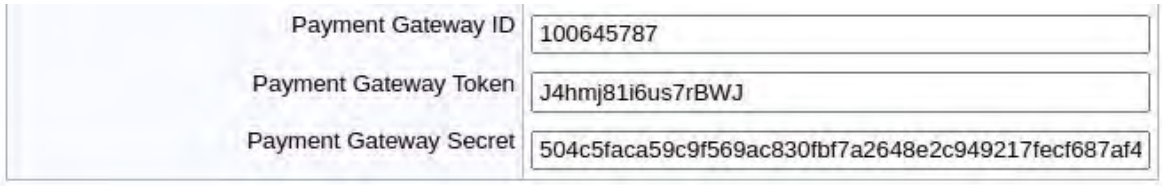
1. Select **Issuing Companies** in the **Accounting** menu to display a table of issuing companies and the **Create New Issuing Company** form.



2. In the **Create New Issuing Company** form, enter the name of the issuing company.
3. Enter the invoice and proforma numbering scheme. This enables you to distinguish between invoices for individual practitioners and your organization.

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4. Enter the files for the following mandatory templates:
   - Patient invoice template
   - Company invoice template
   - Insurance company invoice template
   - Patient credit note template
   - Company credit note template
   - Insurance company credit note template
5. Enter optional template files if required.
6. If your organization uses Conductor's payment provider to manage online and card payments, enter the integration parameters for this issuing company, using the table in *Payment provider integration fields (page 81)* below.



7. Click **Create**.

Payment provider integration fields

If your organization uses Conductor's payment provider to manage online and card payments, you must enter the following values for each issuing company. Contact Lumeon Support if you need more information about these values.

Field	Description
Payment Gateway ID	Payment gateway ID.
Payment Gateway Token	Used in conjunction with the payment gateway secret to authenticate the request. Together they work to confirm the identity and authentication of a payment.
Payment Gateway Secret	Password used to authenticate against the payment gateway token. Together they work to confirm the identity and authentication of a payment.

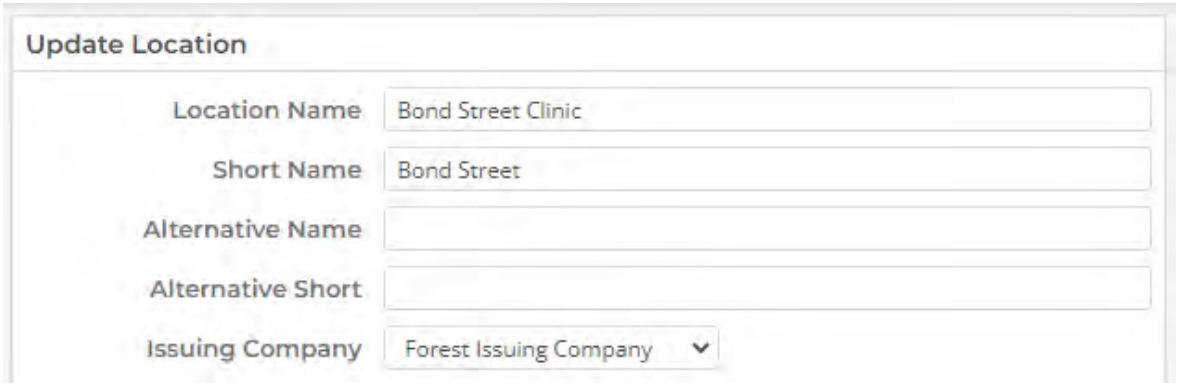
Assign issuing companies to locations

You can assign issuing companies to different locations. To do this, after you have created the issuing company:

1. Select **Locations** in the **Diary** menu. A table of existing locations displays on the left and a **Create New Location** form displays on the right.
2. Select an existing location from the table of locations, or create a new location by entering the location information in the **Create New Location** form.

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3. Select the issuing company from the drop-down list. This feature is controlled by a core configuration parameter. If you cannot see this field and want to assign different issuing companies to different locations, please contact Lumeon Support.

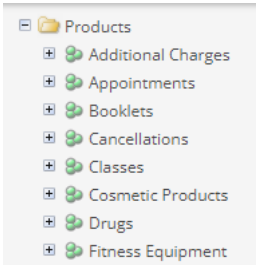


4. Click **Create** or **Update**.

Assign issuing companies to products

You can also assign issuing companies to products. To do this:

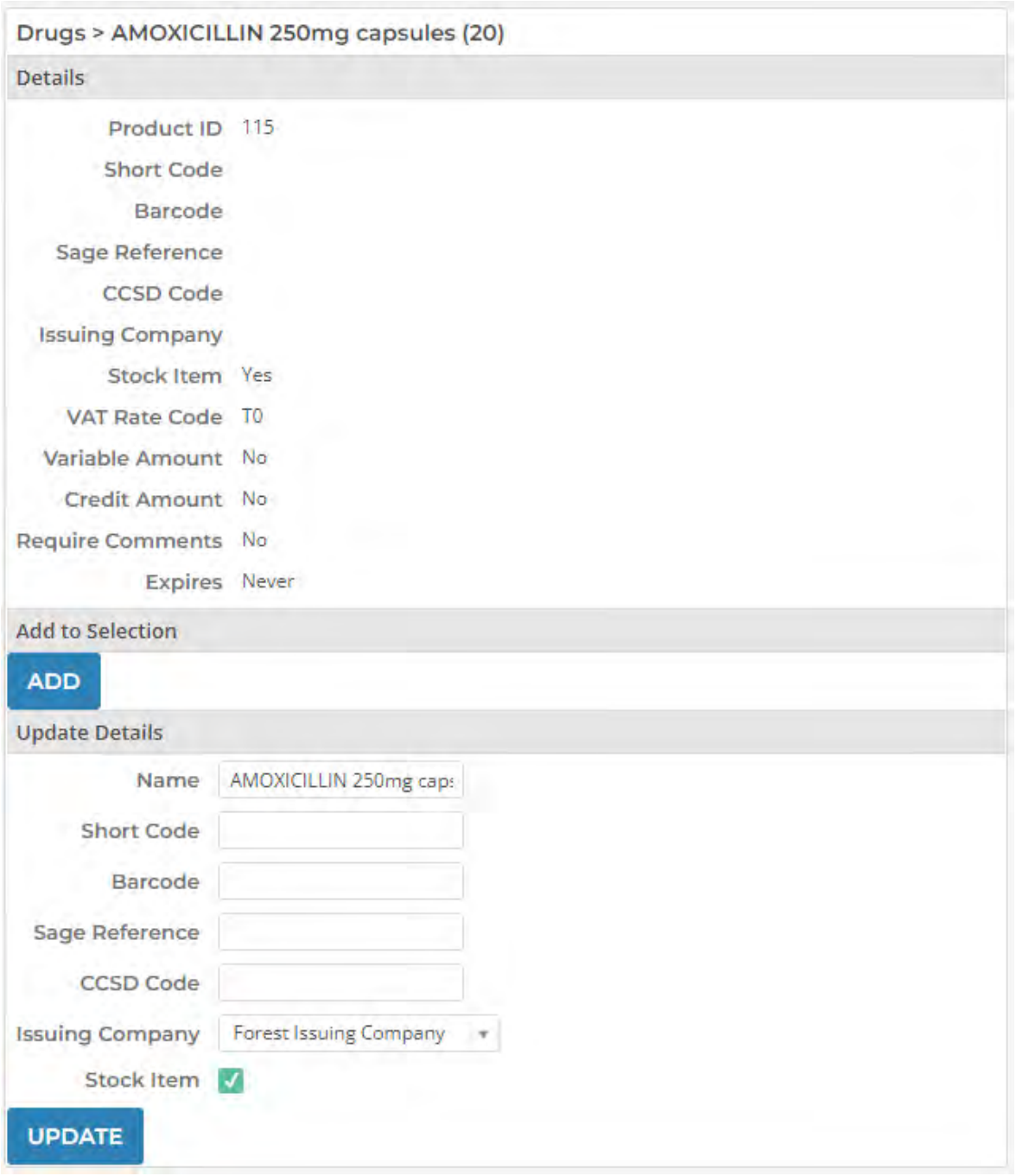
1. Select **Products** in the **Products** menu. The **Products** menu displays on the left and the details of the previous product viewed displays on the right.



2. Expand the **Products** menu by clicking **+** next to a product group until you have found the product that you want to assign the issuing company to, and select it.

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3. In the **Update Details** section of the product, select the issuing company from the drop-down list.



4. Click **Update**.

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Lock accounts

The lock accounts function locks down invoices, credit notes, and refunds to prevent users from cancelling payments or voiding invoices prior to this date. You can make reallocations but you cannot make adjustments to the totals past this point.

To set a date to lock the accounts:

1. Select **Lock Accounts** in the **Accounting** menu. The current lock date displays.
2. Select a new lock date.



3. Click **Lock**. The accounts are now locked up to this date.

Lumeon recommends that you make any data extracts to external systems after the period has been locked. This ensures that the data is consistent across both systems.

Remittance

The remittance feature enables you to take a file of payments recorded in an external system and upload it into Conductor. Conductor automatically allocates the payments.

To do this:

1. Select **Remittance** in the **Accounting** menu.
2. Click **Choose file**, navigate to the file on your computer, and select it.



3. Click **Upload**.

Contact Lumeon Support for more information on the format of the remittance file.

Lumeon processes the file. It generates all the payments and allocations automatically as per the remittance file. If there are any failures or shortfalls, Conductor generates a CSV file which you can downloaded for further action.

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Reports

There are a wide range of standard accounting reports available in Conductor. Also, you can create your own ad hoc reports. You can run the reports at any time or you can schedule the standard accounting reports to run regularly.

There are four options that enable you to do this:

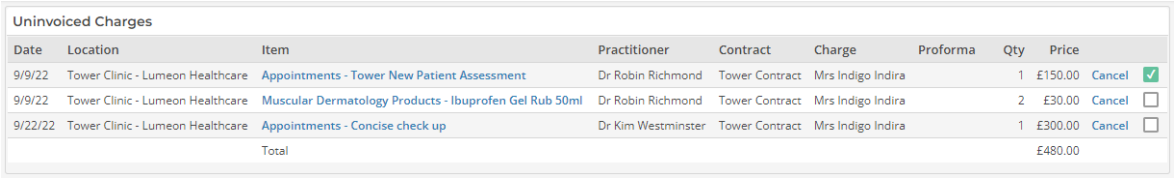
- **Reports** - Displays a list of standard reports enabling you to run or schedule a report.
- **Reports Scheduler** - Displays a list of standard reports enabling you to create regular report schedules.
- **Ad Hoc Reporting** - Displays a list of ad hoc reporting views that users have created, enabling you to select the information you want to display on the report, and then save or run it.
- **Ad Hoc Reporting Views** - Enables you to create a reporting view by building up the information in the Conductor database that you want to include in the report.

Shortfalls

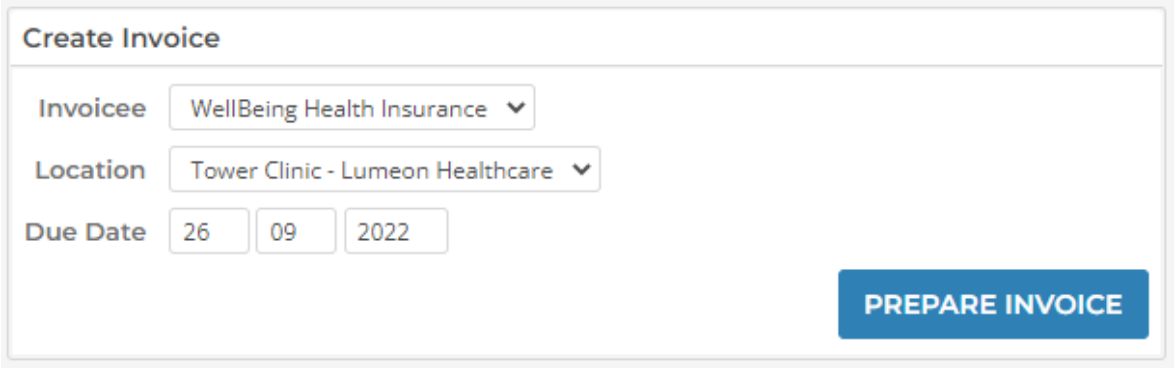
In some situations, you may have a shortfall between the invoice amount and the payment from the insurance company or company. If this occurs, you can take payment for the difference from the patient.

To do this:

1. Search for the required patient using the **Patient Search** option in the top menu bar.
2. On the patient's **Charges** page, select the charge from the table of uninvoiced charges.

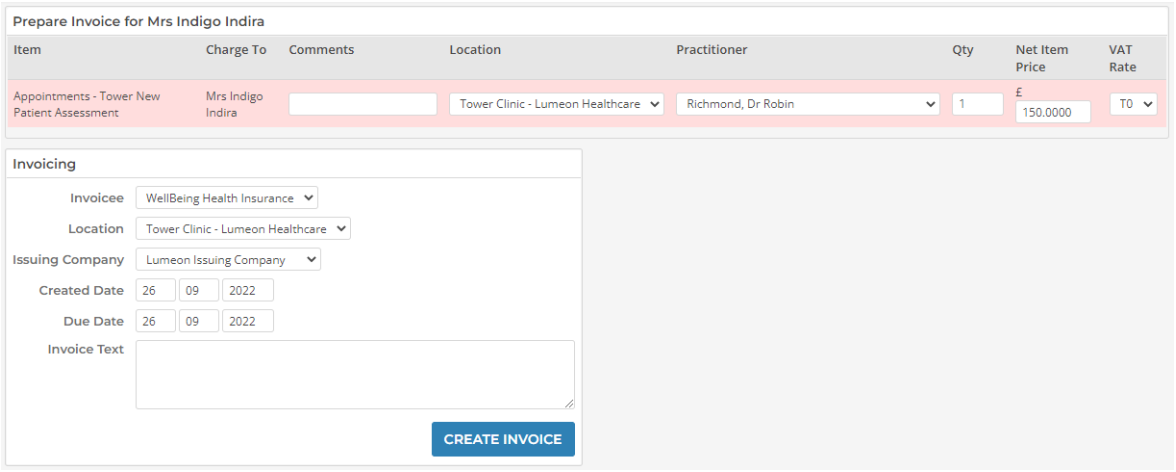


3. In the **Create Invoice** form, ensure that the insurance company is selected, and click **Prepare Invoice**.

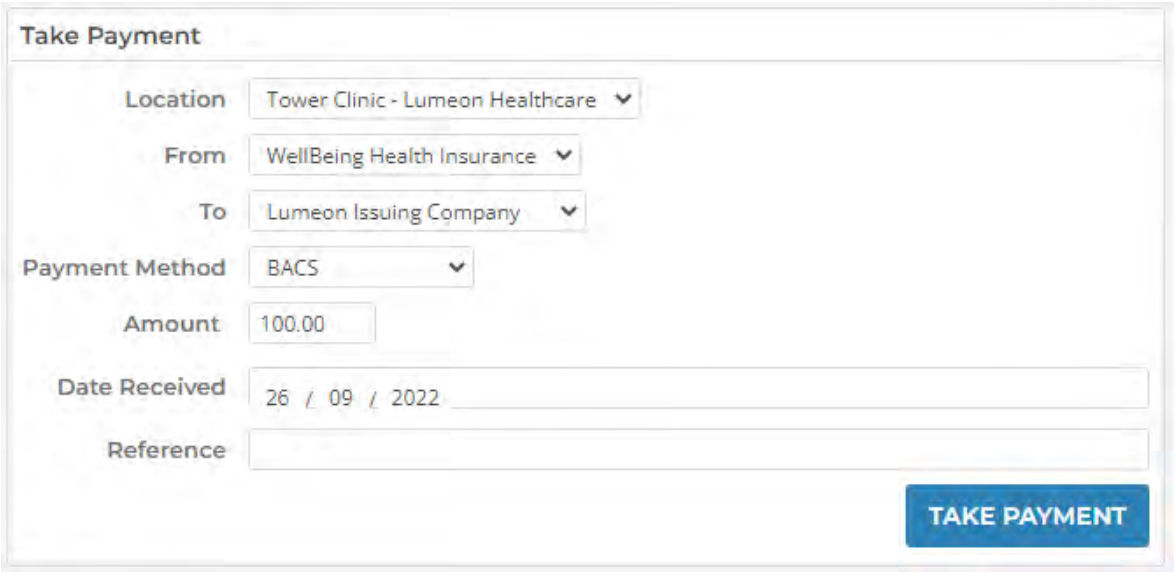


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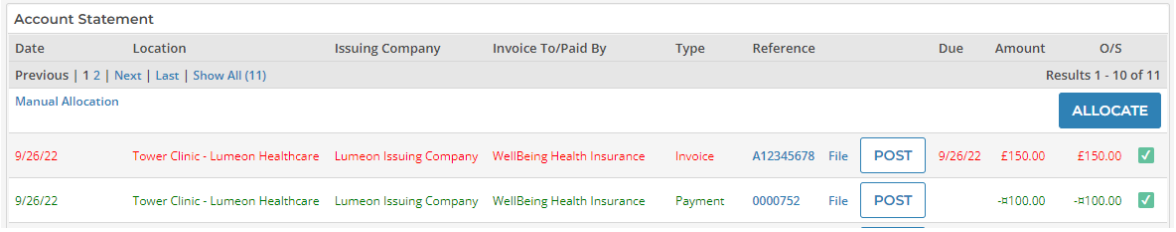
4. Confirm the invoice details are correct and click **Create Invoice**.



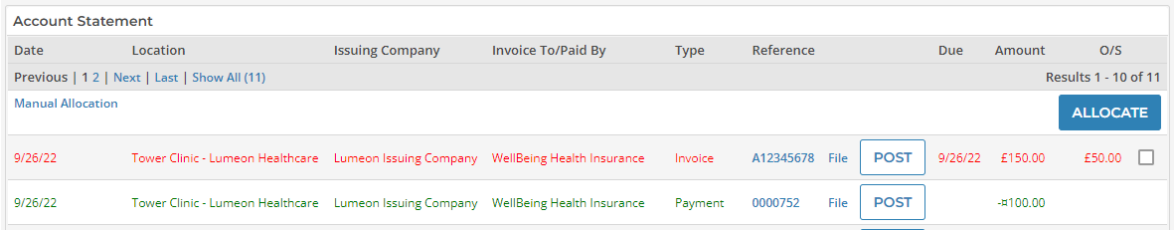
5. On the patient's **Invoices & Payments** page, take the payment from insurance company.



6. In the account statement table, select the invoice and the payment, and click **Allocate**. This allocates the insurance company's payment to their invoice.

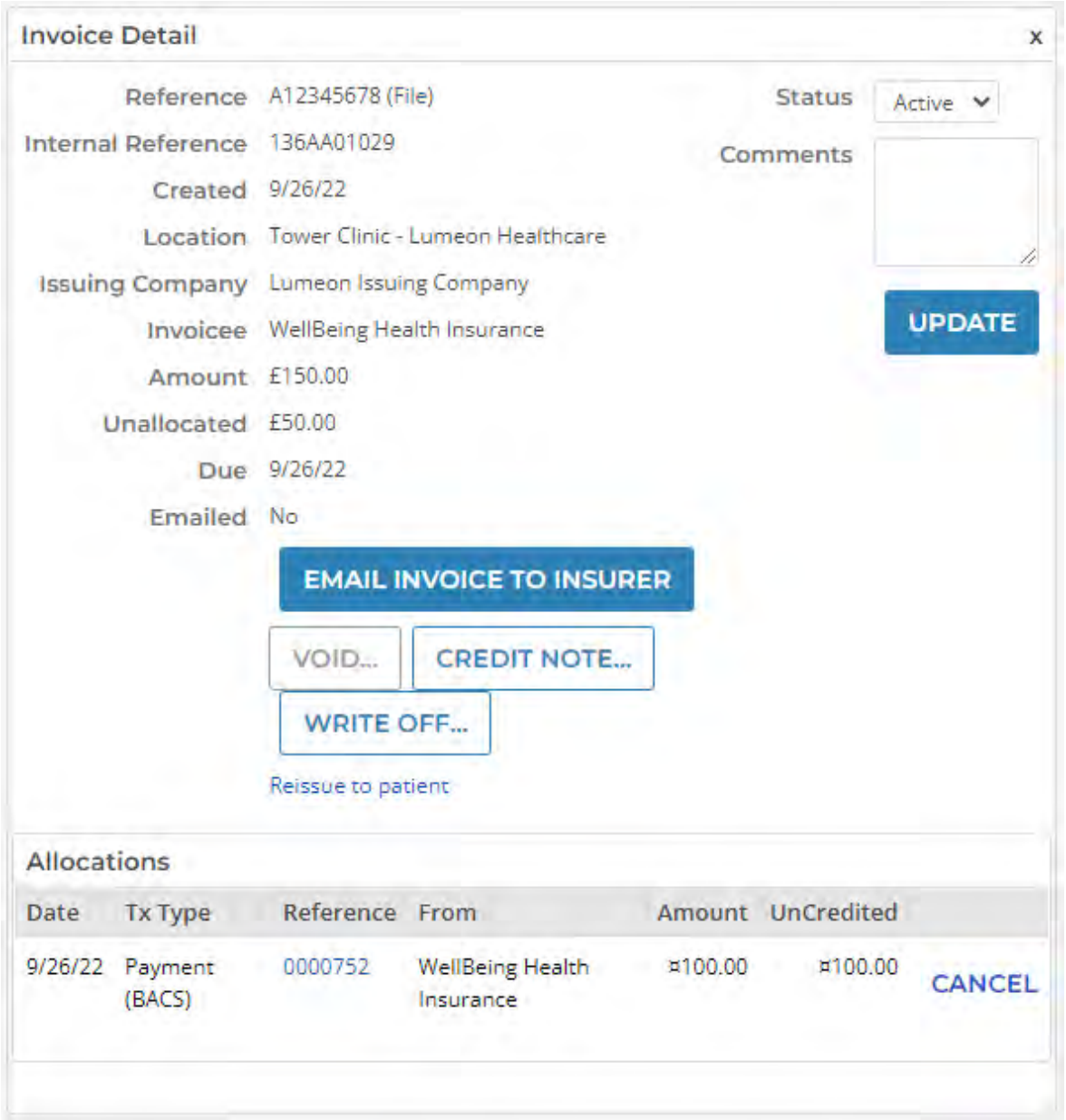


7. The shortfall now displays in the **Account Statement**.



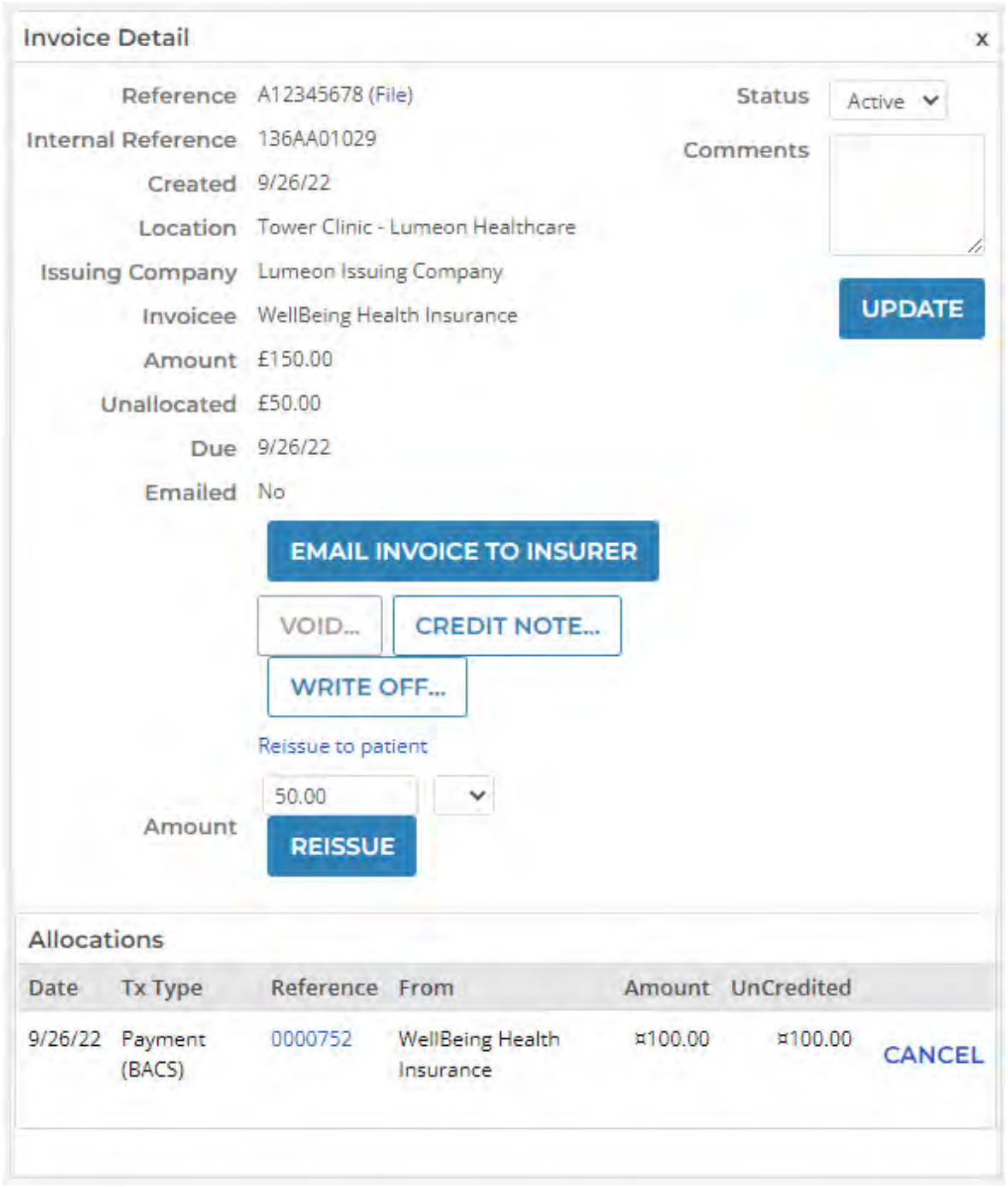
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8. Click on the invoice reference number and, in the **Invoice Detail** form, click **Reissue to patient**.



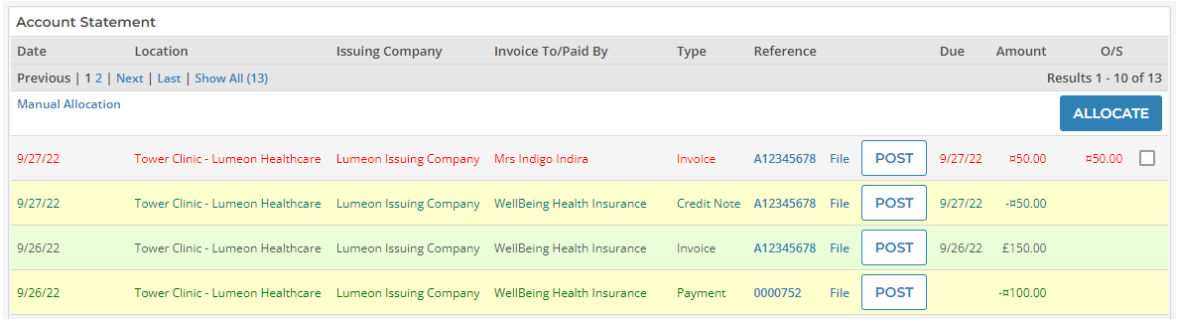
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9. The shortfall displays in the **Amount** field. Confirm it is correct.

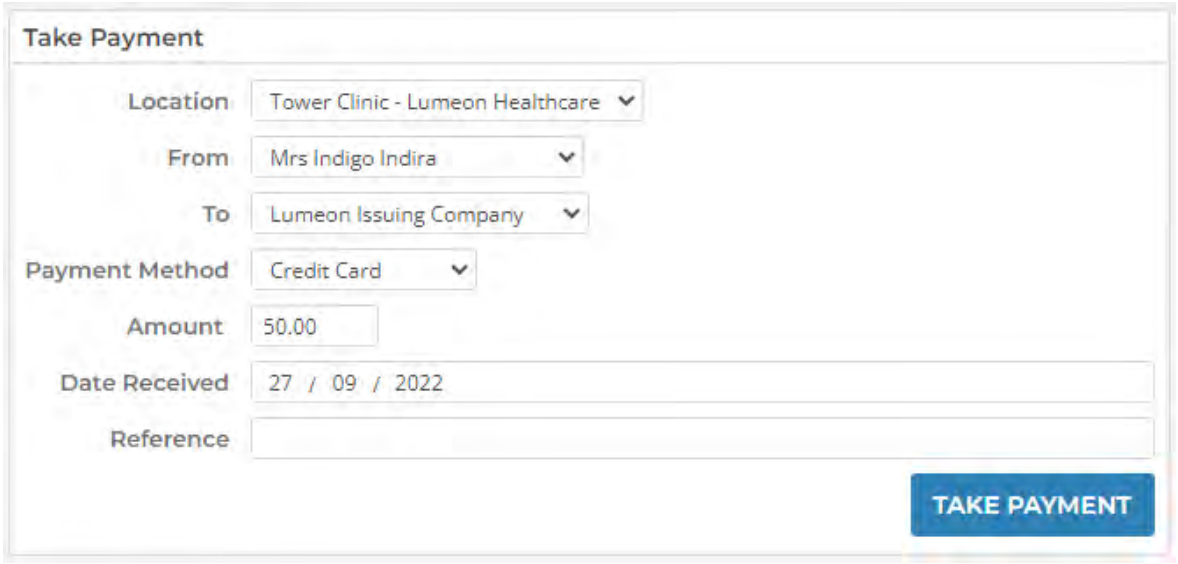


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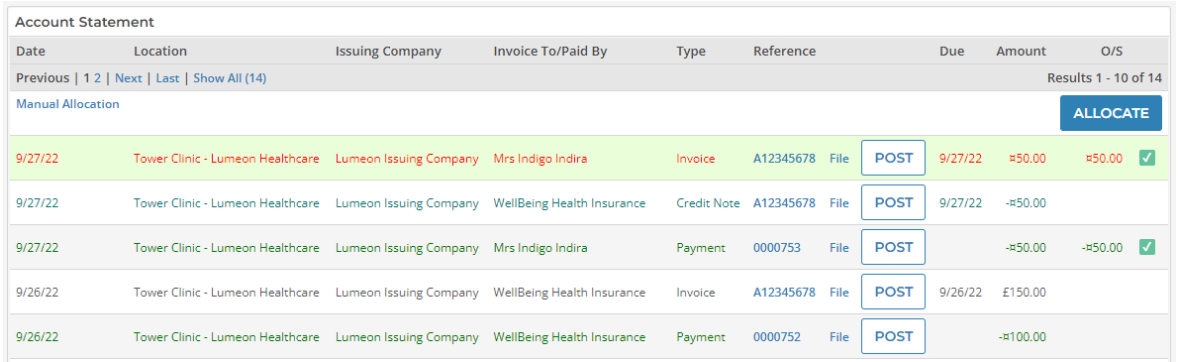
10. Click **Reissue**. This creates a credit note for the insurance company and raises a new invoice for the patient.



11. In the **Take Payment** form, enter the amount that the patient must pay, and click **Take Payment**.

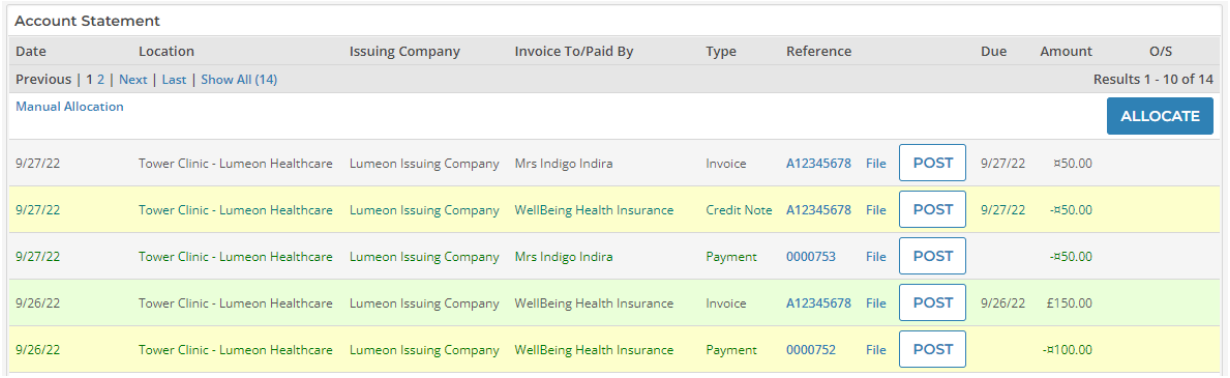


12. Select the patient invoice and payment, and click **Allocate**. This allocates the patient's payment to the patient's invoice.



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The account statement shows all the invoices, payments and the credit note. You can clicking on a reference number to highlight which invoices, payments, and credit notes are allocated to one another.



Account Statement

Date	Location	Issuing Company	Invoice To/Paid By	Type	Reference			Due	Amount	O/S
Previous | 1 2 | Next | Last | Show All (14)										Results 1 - 10 of 14
Manual Allocation										ALLOCATE
9/27/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	Mrs Indigo Indira	Invoice	A12345678	File	POST	9/27/22	¤50.00	
9/27/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	WellBeing Health Insurance	Credit Note	A12345678	File	POST	9/27/22	-¤50.00	
9/27/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	Mrs Indigo Indira	Payment	0000753	File	POST		-¤50.00	
9/26/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	WellBeing Health Insurance	Invoice	A12345678	File	POST	9/26/22	£150.00	
9/26/22	Tower Clinic - Lumeon Healthcare	Lumeon Issuing Company	WellBeing Health Insurance	Payment	0000752	File	POST		-¤100.00	

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Integration with a payment provider

Conductor provides integration with a payment provider to manage credit card payments.

Conductor partners with JudoPay to provide online payment services. JudoPay provides support for multiple payment methods and currencies, fraud detection, security, and payment authentication.

See *https://www.judopay.com/* for more information.

Please contact your Lumeon account manager if your organization is interested in integrating with our payment provider, ***JudoPay***.

To take a payment by credit card, select **Credit Card** from the drop-down list in the **Payment Method** field in the **Take Payment** form. Conductor uses the payment provider to manage this payment. The payment provider accepts payments using all major commonly available credit cards, depending on the merchant IDs being available.

Issuing companies

If your organization uses Conductor's payment provider, you must enter the appropriate information to enable it for each issuing company. See *Set up an issuing company (page 80)* for details.

Pre-authorisation

You can pre-authorise a payment before the appointment takes place. Pre-authorising reserves the amount from the patient's bank/card account. After the appointment, or at another time, you can complete the payment. If the payment has been pre-authorised but not completed, the payment provider releases its hold on the money back to the patient's account within 90 days.

To pre-authorise a payment, select **Pre-authorise** from the drop-down list in the **Payment Method** field in the **Take Payment** form.

If you take a pre-authorised payment, then the payment displays in the **Account Statement** with a **P** against it. Click **P** to complete the payment.

Store card details

The payment provider enables card details to be stored and used for future payments.

To store card details, you must create a pre-authorisation payment of, say, £1.

Then, select **Store Card Details** from the drop-down list in the **Payment Method** field, fill in the requested card details, and click **Take Details**.

The pre-authorisation payment is held and then immediately released.

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Healthcode

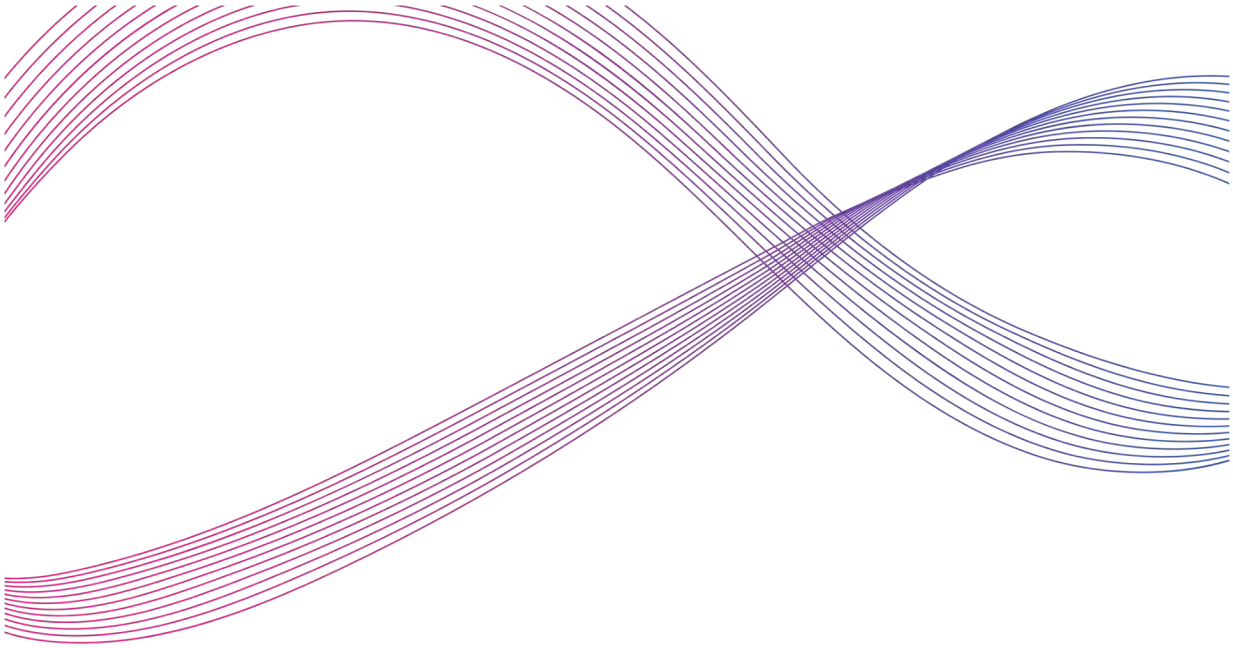
If your organization uses ***Healthcode*** to reconcile payments against invoices, see ***Healthcode in Lumeon Conductor*** for information on how to set it up and use it.

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Glossary

Healthcode	An electronic invoice clearing service that enables private healthcare providers to send invoices to insurers for processing and payment. The clearing service validates invoices to ensure they are complete and correct, and then forwards them securely to the relevant private medical insurance (PMI) company. Healthcode's clearing service runs on a cloud-based application called HC VEDA (Virtual Electronic Data Application). See *https://www.healthcode.co.uk/* and *https://www.healthcode.co.uk/medical-billing/hc-veda* for more information.
JudoPay	Conductor partners with JudoPay to provide online payment services. JudoPay provides support for multiple payment methods and currencies, fraud detection, security, and payment authentication. See *https://www.judopay.com/* for more information.

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Appointment Types in Lumeon Conductor 24.2

Issued by: Lumeon Learning
Date of issue: August 2024

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Introduction

Lumeon Conductor can generate appointments quickly and easily, making effective use of diaries across teams and locations while referencing patient data to schedule and confirm relevant appointments. Providers can operate closer to maximum capacity and sequence appointments to make more efficient use of company resources.

Before users can book appointments for patients into a diary, you must create appointment types so they can be allocated to practitioners and linked to their specialty.

Purpose

The purpose of this document is to explain how to set up appointment types. This includes:

- Important factors to consider when setting up appointment types - see *Set up successful appointment types (page 4)*.
- How to create a new appointment type - see *Create a new appointment type (page 7)*.
- Appointment section groups - see *Appointment section groups (page 15)*.
- Appointment modules - see *Appointment modules (page 16)*.
- How to add an appointment type to a contract - see *Add an appointment type to existing contracts (page 18)*.
- How to reprice an appointment type - see *Reprice an appointment type on one or several contracts (page 20)*.

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Set up successful appointment types

Several factors are important to consider before setting up an appointment type.

Specialties

In Conductor, a specialty refers to an area of clinical expertise.

When you create appointment types, you should apply practitioners' specialties to the appointment to indicate the clinical skill required to deliver the patient appointment.

Conductor then searches for practitioners with the required specialty when searching for available appointments.

Appointment length

When setting the length of an appointment, you must consider the length of the diary appointment slots.

If diary appointment slots are 15 minutes in length, Conductor can schedule appointments with a duration of 15, 30, 45, or 60 minutes.

With diary appointment slots of 15 minutes, you cannot schedule appointments with a defined duration of 10, 20, or 40 minutes.

You can create variable length appointments, but when booking these appointments you must manually enter the appointment duration.

Multi-part appointments

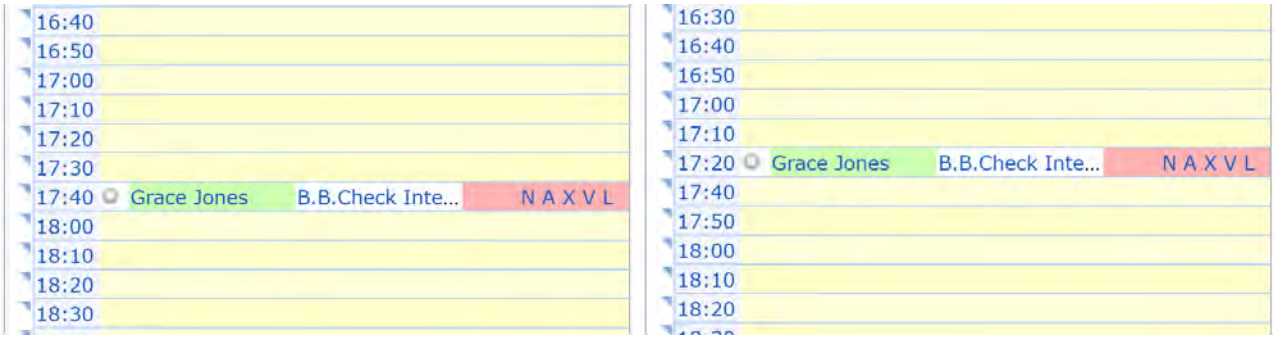
Conductor enables you to create single-part or multi-part appointment types.

A single-part appointment requires only one practitioner to deliver the patient care or treatment. You can book a single-part appointment in the diary or using the search engine.

A multi-part appointment involves more than one treatment or procedure and may require more than one practitioner to deliver the patient care. For example, an appointment may require that a patient sees a nurse for the initial 20 minutes of an appointment, followed by 20 minutes with a physiotherapist and finally spending 20 minutes with a consultant; with the patient seeing each practitioner in a separate room. You must book a multi-part appointment using the search engine.

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When searching for multi-part appointments, Conductor locates available practitioners with available appointment slots and books the appointment seamlessly in successive slots across the required practitioners' diaries.



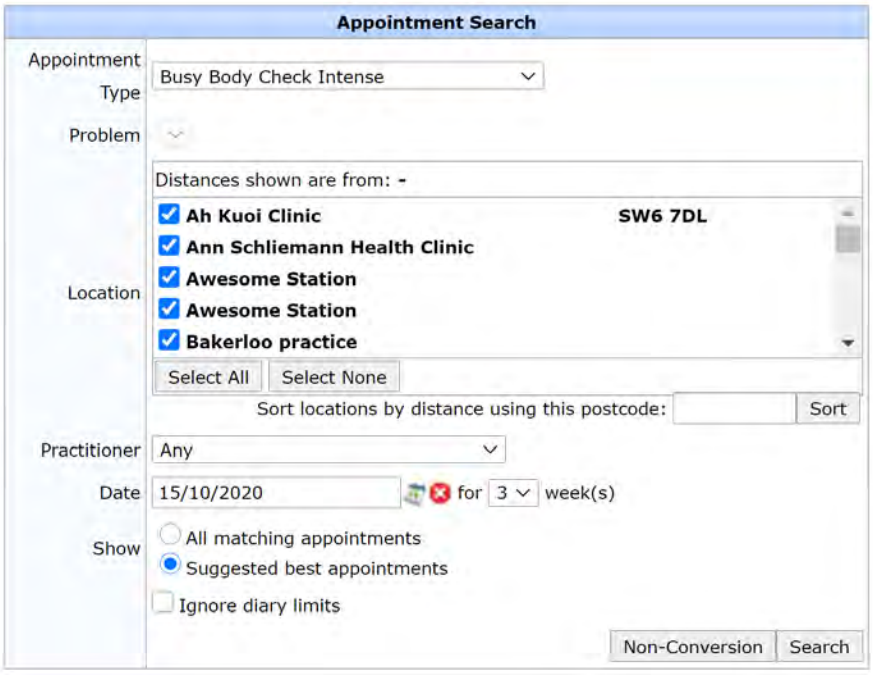
Conductor also enables you to create appointments with a gap between the appointment sections if a patient needs to spend some time in a waiting area. For example, a glucose fasting test may require a patient to have blood samples taken, consume a glucose solution, and wait for two hours before having blood samples taken again.

Search behaviour

Conductor employs efficiency rules to cluster appointments, allowing diaries to operate at maximum capacity.

Select **Suggested best appointments** during the booking process to cause the search engine to display only appointments at the start or end of a section in the diary, or directly before or after other scheduled appointments or busies.

If you have selected **Suggested best appointments** and you are scheduling a multi-part appointment, the search engine prioritizes the part of the appointment that you have selected in the **Search behaviour** drop-down list. The search engine uses that section to optimize the appointment booking at the start or end of a section in the diary, or directly before or after other scheduled appointments or busies.



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Use suggested best appointments as default

A core configuration setting enables you to show **Suggested best appointments** as default instead of **All matching appointments**.

Contact Lumeon Support if you want to enable this feature.

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Create a new appointment type

To create a new appointment type, select **Appointment Types** in the **Diary** menu. The **Appointment Type Management** page is displayed.

On the left hand side, the page displays four tables showing all pending, active, superseded, and cancelled appointment types.

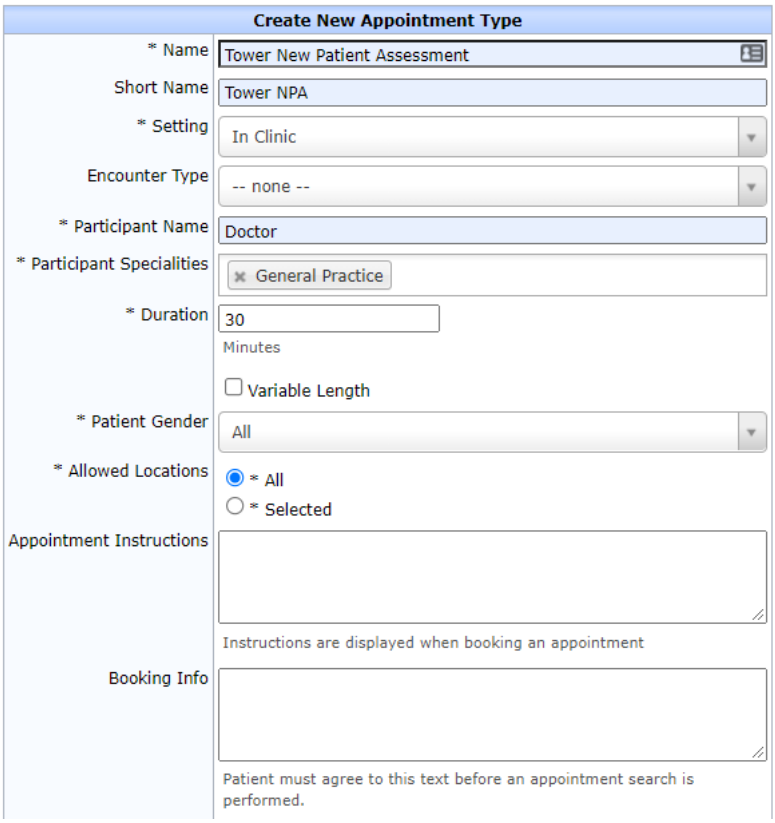
To edit a pending or active appointment type, select the name of the appointment.

You can copy an active or pending appointment, and either save it as a new appointment type or supersede the original appointment type.

New appointment type

To create a new appointment type:

1. Complete the **Create New Appointment Type** form on the right of the **Appointment Types** page, using the table in *Appointment type fields (page 8)*.



2. Click **Create** to set up the new appointment type. The appointment type details and other forms are displayed so that you can add more information about the appointment type. See *Appointment type details (page 9)*.

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Appointment type fields

Complete the details of the new appointment type using the following table. The fields displayed may vary depending on your configuration. Fields with an asterisk (*) are mandatory.

Field	Description
Name *	Detailed name of the appointment type. You can enter any character.
Short Name	This displays as the appointment name in the diary.
Category	Classification for appointment types. This is a core configuration setting that can be turned on or off. You can create appointment categories in **Appointment Type Categories** in the **Runtime Options** menu.
Setting *	Select the appointment setting, such as **In Clinic** or **Telehealth**, from the drop-down list. You can create settings in **Appointment & Class Settings** in the **Runtime Options** menu.
Encounter Type	Loads a specific set of clinical forms for EMR2 (Conductor's enhanced clinical system).
Participant Name *	Enter the name of the practitioner involved in part of the appointment, for example, Doctor or Nurse. Most appointments have one participant but some appointment types may have more than one, for example, a nurse and then a doctor, or a manual physio and a rehabilitation physio. If this is the case, you can enter the details of the other participants on page 2 of the **New appointment** wizard.
Participant Specialties *	Enter the specialty or specialties of the this participant. If the specialty is not displayed, you can view the specialty using **Specialties** in the **People** menu, and ensure that **Applicable to internal practitioners** has been selected.
Duration *	Enter the period of time that the patient will see this participant for (e.g. 20 or 30 mins). Alternatively, select **variable length** to allow the user to specify the length of the appointment at the time of booking.
Patient Gender *	You can set the appointment to **Male only**, **Female only** or **All** genders.
Allowed Locations *	Select **All** or **Selected** locations. If you choose **Selected**, select the locations where the appointment can take place from the drop-down list.
Appointment Instructions	Enter appointment specific information that needs to be relayed from the booking agent to the patient. This information displays on the booking screen.
Booking Info	Enter booking information that you want to appear in the patient portal. The patient must agree to this information before they can book an appointment. This text can appear in the booking confirmation letter and email. Use the following tag in the templates: `<<appointment_type_booking_information>>`
Patients Can Book Online	Enables patients to book the appointment through the patient portal.
Unregistered Patients Can Book Online	Enables patients to book the appointment through a clinic's website.
Email Comments	Enter comments that you want to appear in the appointment booking confirmation email. Use the following merge tag in the email template: `<<appointment_type_comments>>`
Type Comments	Enter comments that you want to appear in the appointment booking confirmation letter. Use the following merge tag in the letter template: `<<appointment_type_comments>>`
Family Notes	Enter family notes that you want to appear in the appointment booking letter. Use the following merge tag in the letter template: `<<appointment_type_family_notes>>`
Fast	Indicates that the patient must fast before attending.
Complete A Safety Questionnaire	Select the appropriate questionnaire from the drop-down menu. You can create questionnaires using **Forms** in the **Forms & EMR** menu. Use the following merge tag in the **Appointment Create** letter template: `<<appointment_type_complete_a_safety_questionnaire>>`

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Field	Description
Complete A Pre- Scan Questionnaire	Select the appropriate questionnaire from the drop-down menu. You can create questionnaires using **Forms** in the **Forms & EMR** menu. Use the following merge tag in the **Appointment Create** letter template: `<<appointment_type_complete_a_pre_scan_questionnaire>>`
Come Early for Preparations	Enter the preparations text that you want to appear in the appointment booking confirmation email. Use the following merge tag in the email template: `<<appointment_type_come_early_for_preparations>>`
Requires Injection	Enter the injection text that you want to appear in the appointment booking confirmation email. Use the following merge tag in the email template: `<<appointment_type_requires_injection>>`
Requires Anaesthetist	Indicate that the appointment type requires an anaesthetist. Users can select an anaesthetist at the time of booking. Anaesthetists must be set up as external practitioners.
Report Type	Select the clinical report that is linked to the appointment type. When a report is returned from the PACS for this appointment type, it uses this report type.
Report Template	Select the report template that is linked to the appointment type. This automatically creates the selected EMR2 report when the appointment is complete.
Requires Review	Enables an external practitioner to review any clinical data recorded in the appointment. The selected specialty must be set up in as being **Applicable to appointment review**.
Feedback Form	Select a feedback form from the drop-down list. The feedback form is automatically distributed to the patient once **L** is clicked in the appointment tracker.
Lab Tests	Autocomplete field. The lab tests selected are automatically ordered when the appointment is attended.
Recallable	You should only select this if you are using recall functionality.
Linked Questions	Enter the name of a previously created question. During the booking process if a patient has responded to the question previously the previous responses display.  If the question has a scope of activity of **Same Referral Only**, only responses related to the same referral activity are displayed. If the question has a scope of **full patient history**, Conductor displays the most recent patient response given for this question.

Appointment type details

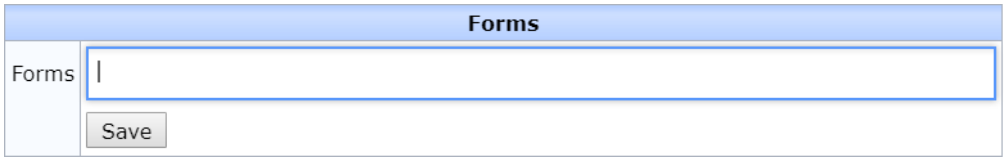
After you have created a new appointment type or if you are editing an existing appointment type, you can:

- Link clinical forms to the appointment - see *Link clinical forms to an appointment type (page 10)*.
- Add additional participants - see *Add additional participants (page 10)*.
- Add room features - see *Add room features (page 12)*.
- Add new problems - see *Problems (page 12)*.
- Link appointment modules - see *Link appointment modules (page 13)*.
- Activate the appointment type - see *Activate the appointment type (page 14)*.

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Link clinical forms to an appointment type

If a clinical form must be completed either before or during the appointment, select the form(s) from the **Forms** section on the right. You can add as many forms as necessary.



Add additional participants

You can optionally add additional participants to an appointment. However, if an appointment has been set up with a variable length, then it can only have one participant.

Add an additional participant

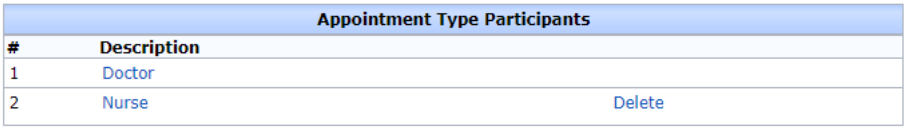
To add an additional participant when creating multi-part appointments:

1. Complete the **Add New Participant** form with a description of the additional participant and their specialties.



2. If room features are enabled for your organization, you can select them when setting up an appointment - see *Add room features (page 12)*.

3. Click **Add Participant**. The participant displays in the list of appointment type participants.



4. Repeat for each additional participant.

Add a new section

When you have added each participant, you must create new sections. A section defines how long each practitioner spends with the patient.

One participant can have multiple sections, for example, if they see the patient at the beginning of their visit and then again after another practitioner. If you need to set up participants with simultaneous sections, give both participants the same times. If multiple practitioners are with the patient simultaneously, the participants can be set up with sections at the same times.

To add a new section:

1. Select the participant's name in the **Appointment Type Participants** form.

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2. Enter the section name in the **Add New Section** form, for example, **Blood Tests** or **Consultation**, and enter the start and end time of that section of the appointment.



3. Click **Add Section**.

4. Repeat for each extra section.

Examples

To create a 60 minute appointment in which a nurse is with the patient for 20 minutes, a physiotherapist for a further 20 minutes and then a doctor for the final 20 minutes, the appointment sections would be defined as:

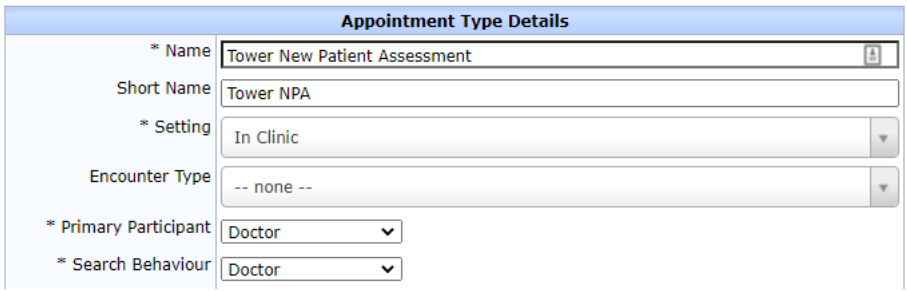
- 00:00 - 00:20: Nurse
- 00:20 - 00:40: Physiotherapist
- 00:40 - 01:00: Doctor

If the same participant is required for non-consecutive sections, you can create multiple sections In the following manner:

- 00:00 to 00:20: Nurse section 1
- 00:40 to 01:00: Nurse section 2
- 00:20 to 00:40: Doctor

Check participants

Once you have completed the sections, ensure the **Primary Participant** and the **Search Behaviour** participant are correct in the **Appointment Type Details** box on the left.



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The **Primary Participant** is linked to the specialty that the appointment is listed under. When using the search engine, Conductor only displays practitioners associated with the particular clinical specialty. This is also the practitioner who is referred to in any appointment confirmation correspondence to the patient.

The **Search Behaviour** participant relates to the participant scheduled first by the search engine. This allows users to maximise the use of resources available.

Add room features

If core configuration settings specify that separate room and practitioner diaries can be opened, you can set up room features using the **Room Feature** option in the **Diary** menu.

If room features have been created, you can select them when setting up an appointment.



Select **Share primary participant's room** if it is a multi-part appointment and this participant should be booked into the same room as the primary participant, so that the patient does not have to move rooms.

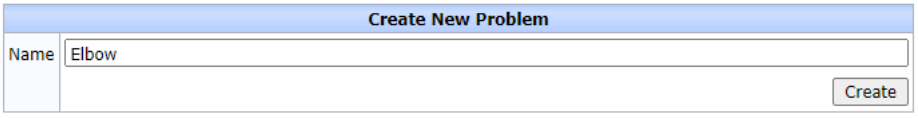
Problems

You can create problems and you can link them to appointment types. When a patient books an appointment, you can select a particular problem that the patient has.

Create problems

To create problems:

1. Select **Problems** in the **Products** menu. Previously created problems display in the **Problems for Appointment Types** table on the left and the **Create New Problem** form displays on the right.



2. Enter the name of the problem and click **Create**.

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Add problems to an appointment type

You can link these problems to appointment types. To do this:

1. In the **Add New Problems** form, click **Add** in the row of the problem you want to add.

Add New Problems	
Name	
Foot	Add
Head	Add
Knee	Add

2. Continue to add all the problems that you want to be linked to this appointment type. The new problems appear in the **Current Problems** list. You can select any of these problems when you book an appointment of this appointment type.

Current Problems	
Name	
Foot	Remove
Knee	Remove

Link appointment modules

To link appointment modules to appointment sections:

1. Select the relevant appointment type participant.

Appointment Type Participants	
#	**Description**
1	Physiotherapist

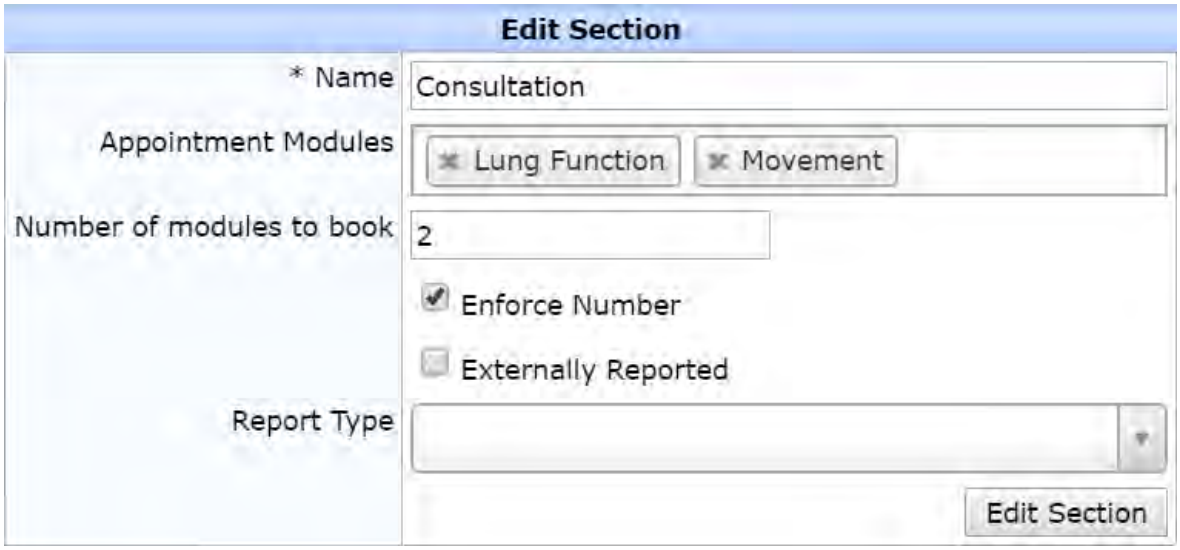
2. Click **Edit** alongside the relevant appointment section.

Participant Sections				
Name	**Start**	**End**	**DICOM Procedure**	
Consultation	00:00	00:15		Edit

3. Search for the appointment modules to be linked to this section and fill out the recommended number of modules to be booked.

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4. Select **Enforce Number** displays an error message if the correct number of modules are not selected at the time of booking the appointment.



For more information, see *Appointment modules (page 16)*.

Activate the appointment type

To activate the appointment, set the VAT rate to **T0**, **T1** or **T9**, and click **Activate**. These values can be configured in Conductor and can be set to 4 decimal places.



Contact Lumeon Support if you need to add or change the VAT rates.

If you do not activate the appointment, it displays as a pending appointment type and you can activate it later.

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Appointment section groups

Appointment section groups enable clinics to group appointment section types together. This is useful when creating limits on diary templates.

To create an appointment section group:

1. Select **Appointment Section Groups** in the **Diary** menu. Existing appointment section groups display in the **Appointment Section Groups** table on the left and the **Create New Appointment Section Group** form displays on the right.
2. Enter the group name in the **Create New Appointment Section Group** form and click **Create**.
3. Select the newly created group and select an appointment type section from the drop-down list in the **Add Appointment Type Section** form. Click **Add**.
4. Continue to add appointment type sections to the group.

You can now create group limits on diary templates.

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Appointment modules

The appointment modules functionality enables individual modules to be associated with appointment sections, giving the patient an option to choose which modules they wish to undertake. The feature also enables administrators to define the activities that an appointment participant needs to perform within the appointment.

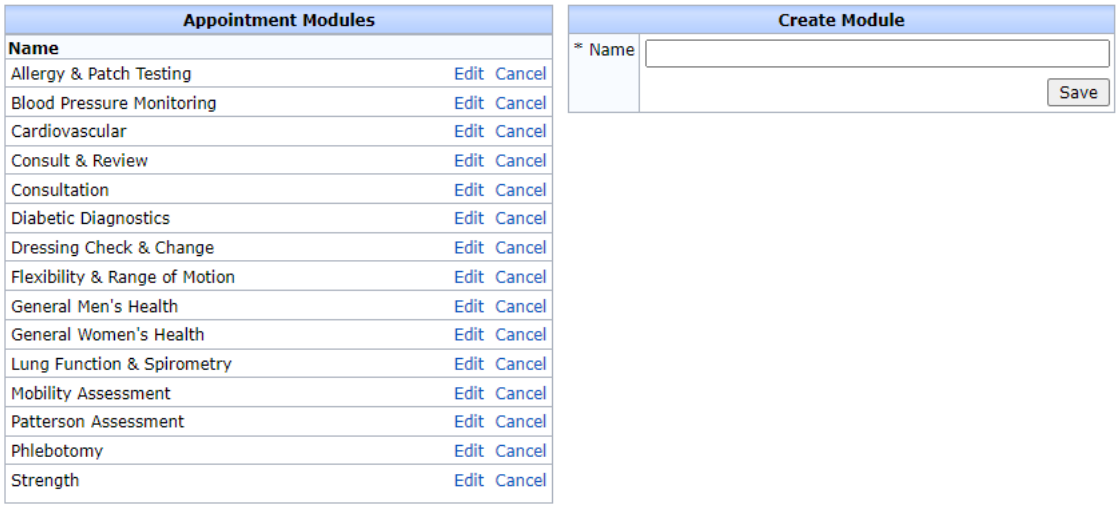
For example, an appointment may require a nurse to take a blood sample, then perform an ECG and a lung function test. The administrator can select each of these modules when booking the patient appointment.

The appointment modules feature is controlled by a security point. Contact Lumeon Support if you want this feature enabled.

For clients using the EMR2 functionality, when carrying out an appointment, practitioners only see the EMR2 note type sections relevant to that specific appointment, rather than all possible sections.

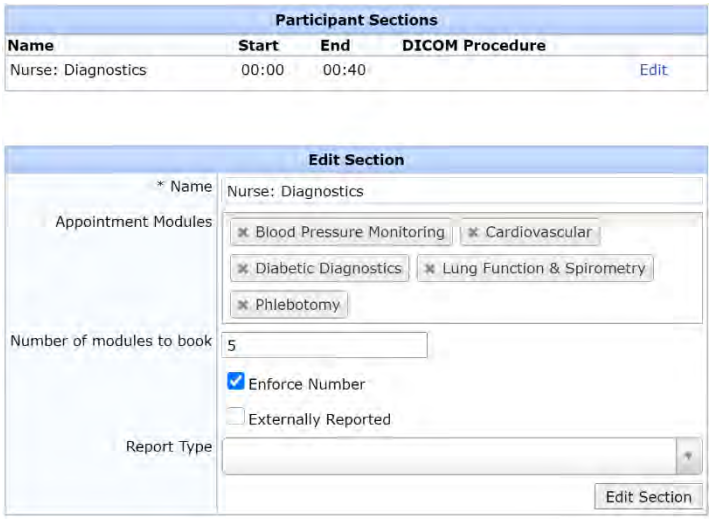
If you can book appointments via worklists only, you can select appointment modules when managing patient appointments.

You can create appointment modules by selecting **Appointment Modules** in the **System Configuration** menu.



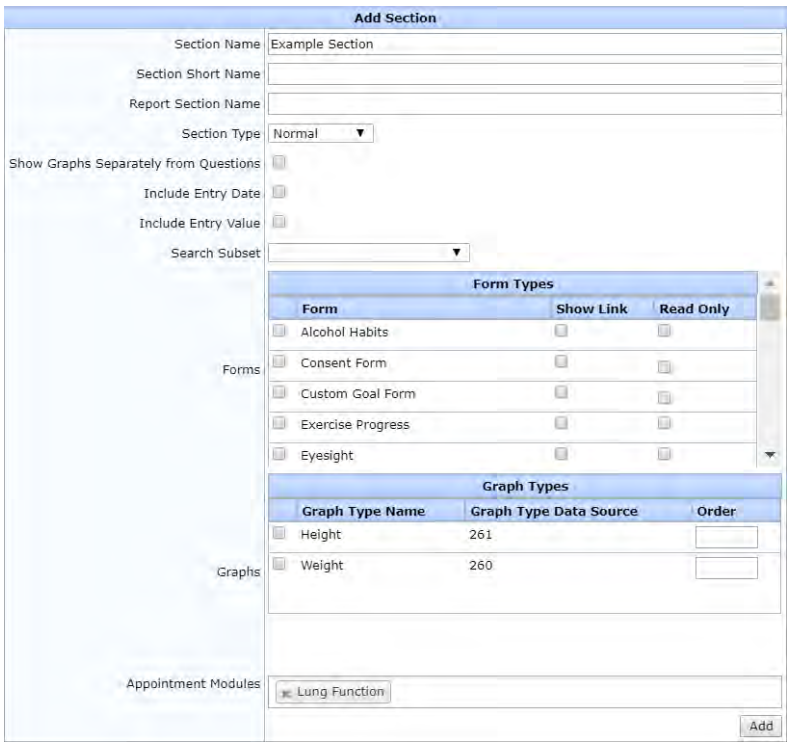
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You can link appointment modules to appointment participants when setting up an appointment type section.



If using EMR2, you must also associate appointment modules with the relevant sections within EMR note types.

If you do not select any modules when creating a section within a note type, this section displays.



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Add an appointment type to existing contracts

An appointment is only available for booking if it has been added to a contract.

To add an appointment type to existing contracts:

1. Select **Wizards** in the **Products** menu.
2. Select **Add Product Wizard** in the **Wizards** menu.
3. Follow the four steps of the add product wizard.

Step 1 - select product

Start entering the appointment type name. This works on an auto-complete system. Enter part of the appointment type name to display matching products. Select the one that you want to add to one or more contracts.



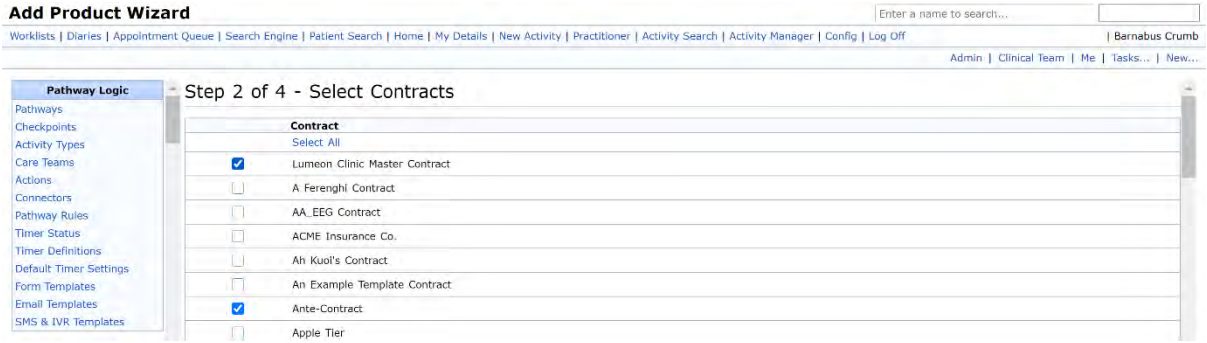
Enter an effective date, or leave blank if the appointment type should become effective immediately. You can add an appointment type with retrospective effective dates.

Conductor does not allow users to make bookings for an appointment type before the effective dates or after the appointment type expiry date (if set). If no expiry date is set, the appointment type is available indefinitely.

Click **Next**.

Step 2 - select contracts

Select the contract(s) that you want the appointment type to be added to.



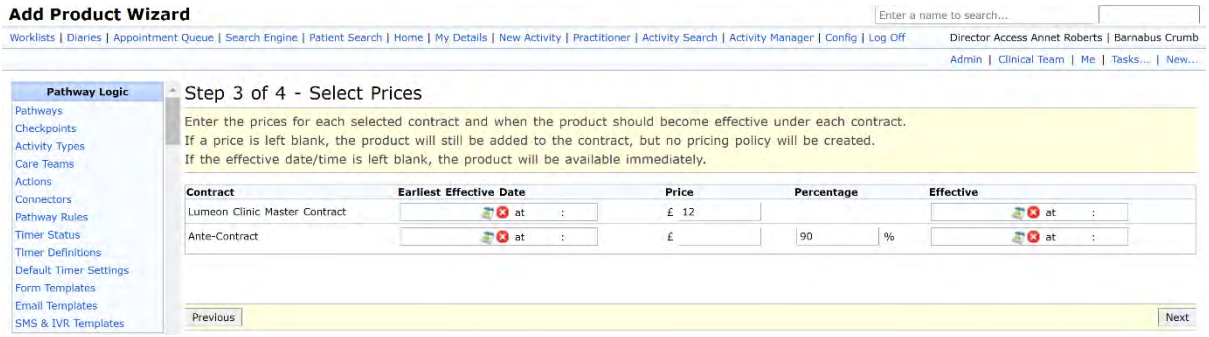
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Click **Next**.

Step 3 - select prices

Enter the price for each selected contract and when the appointment type should become effective under each contract. If a price is left blank, the appointment type is still added to the contract, but no pricing policy is created.

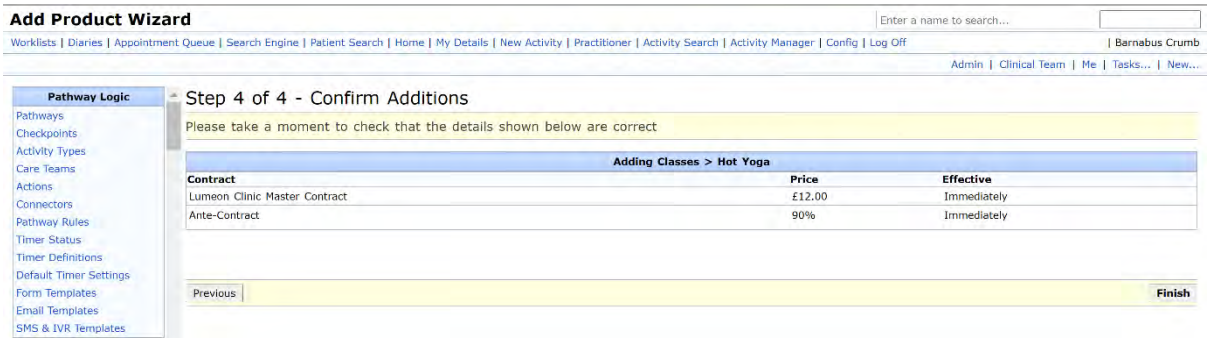
If the effective date/time is left blank, the appointment type is available immediately.



Click **Next**.

Step 4 - confirm additions

Confirm that the appointment type is being added to the correct contracts, and that the contract prices and the effective dates are correct.



Click **Finish** to complete adding the appointment type to the contracts.

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Reprice an appointment type on one or several contracts

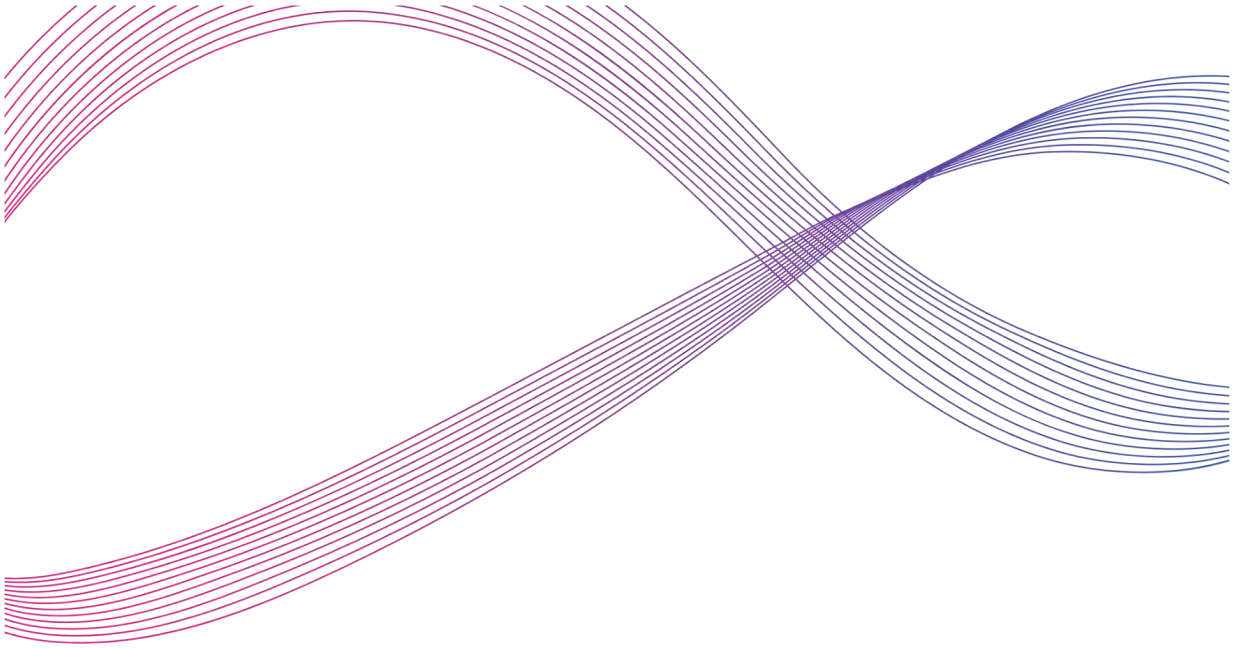
To reprice appointment types that have previously been priced:

1. Select **Wizards** in the **Products** menu. Select **Pricing Wizard**.
2. Start typing the name of the appointment type name in the **Product** field and a list of products that match the entered text is displayed.
3. Select the appointment type that needs repricing, enter an effective date and click **Next**.
4. Enter the new prices for each contract and the date and time when they take effect. Click **Next**.
5. Confirm the new prices and click **Finish**.

Conductor recognizes that the price for an appointment type has changed and uses the new price for any bookings taken and subsequent invoices raised after the effective date.

You can also download, complete and re-upload a template to apply pricing changes to products. To do this, select **Wizards** in the **Products** menu, and then select **Update Prices Wizard**.

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Campaign Builder in Lumeon Conductor 24.2

Issued by: Lumeon Learning
Date of issue: August 2024

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Introduction

Lumeon Conductor provides a comprehensive care orchestration platform with a number of features including building campaigns and distributing them to patients using interactive text (SMS) messages or voice (IVR - interactive voice response) messages.

The campaign builder enables you to send out bulk SMS or IVR (interactive voice response) messages to patients quickly and efficiently. For example, if there is a burst water main outside one of your clinics, you can send a message to all patients with appointments today informing them to allow extra time to get there. Another example is to enable your marketing team to send out a message to all patients who had an appointment today asking about their experience.

Purpose

The purpose of this document is to describe how to:

1. Format a campaign upload file - see *Campaign upload file (page 4)*.
2. Start using campaign builder - see *Start using campaign builder (page 6)*.
3. Create a new campaign - see *Create a new campaign (page 7)*.
4. Search for a campaign - see *Search for a campaign (page 17)*.
5. Edit an existing campaign - see *Update a campaign (page 18)*.
6. Schedule a campaign - see *Schedule a campaign (page 19)*.
7. View campaign reports - see *Campaign reports (page 21)*.
8. Use other campaign functions - see *Other campaign builder functions (page 22)*.
9. Troubleshoot problems you may encounter in campaign builder - see *Troubleshooting (page 23)*.

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Campaign upload file

Before you create your campaign, you must have a campaign file containing the message recipients and their details. This file may be a download from an EHR, data warehouse, or any other external system.

The file must be in CSV (comma-separated variable) format. You can use a spreadsheet, such as Excel, or a text editor, such as Notepad, to view the file. If you use Excel, you must be careful with phone numbers because it reformats them unless the column has been set to **text** beforehand.

For example:

	A	B	C	D	E	F	G	H
1	phone_number	language	send_method	First	Last	Date	Time	Dept
2	+12087195747	fr_FR	SMS	Ashley	Brown	08/09/2023	6:00 pm	Radiology
3	+14306044833	en_US	SMS	Joshua	Miller	08/09/2023	2:00 pm	Orthopedics
4	+13043032305	fr_FR	SMS	Jessica	Garcia	08/09/2023	10:00 am	Orthopedics
5	+12165843376	en_US	SMS	William	Smith	08/09/2023	12:50 pm	Radiology
6	+14325993783	en_US	SMS	Patricia	Lewis	08/09/2023	3:20 pm	Urology
7	+12769642165	en_US	SMS	Steven	Perez	08/09/2023	11:50 am	Urology
8	+12316919218	fr_FR	SMS	Betty	Taylor	08/09/2023	1:10 pm	Urology
9	+14092662322	fr_FR	SMS	Joshua	Robinson	08/09/2023	11:50 am	Urology
10	+12319424311	en_US	SMS	Elizabeth	Martinez	08/09/2023	4:30 pm	Orthopedics
11	+13233537979	en_US	SMS	Karen	Williams	08/09/2023	10:50 am	Orthopedics
12	+12396164089	es_ES	SMS	Elizabeth	Robinson	08/09/2023	11:10 am	Orthopedics
13	+13514047095	en_US	SMS	Susan	Hall	08/09/2023	9:10 am	Orthopedics
14	+13176619827	es_ES	IVR	Kimberly	Lee	08/09/2023	8:50 am	Ophthalmology
15	+13205634850	en_US	SMS	Michael	Anderson	08/09/2023	5:30 pm	Neurology
16	+13084783637	en_US	IVR	Barbara	Thomas	08/09/2023	1:10 pm	Neurology
17	+13209219626	fr_FR	SMS	Thomas	Lewis	08/09/2023	9:50 am	Ophthalmology
18	+12243017036	en_US	SMS	William	Wilson	08/09/2023	3:50 pm	Ophthalmology
19	+13863481516	en_US	SMS	Michael	Walker	08/09/2023	1:30 pm	Urology
20	+14317915969	en_US	SMS	Joshua	Smith	08/09/2023	3:40 pm	Urology
21	+12082666494	es_ES	SMS	Karen	Thompson	08/09/2023	5:20 pm	Urology
22	+12486228765	es_ES	IVR	Michael	Lopez	08/09/2023	4:30 pm	Radiology
23	+13047506819	en_US	SMS	David	Jackson	08/09/2023	11:50 am	Radiology
24	+12693984233	en_US	SMS	Michael	Williams	08/09/2023	12:30 pm	Orthopedics
25	+13619175407	en_US	SMS	David	Jackson	08/09/2023	1:30 pm	Neurology
26	+14122979089	es_ES	SMS	Mary	Martinez	08/09/2023	4:20 pm	Orthopedics
27	+12289684052	fr_FR	SMS	Elizabeth	Smith	08/09/2023	6:10 pm	Urology
28	+14703911200	fr_FR	SMS	Donna	Thomas	08/09/2023	12:00 pm	Ophthalmology
29	+12165334777	es_ES	SMS	Patricia	Harris	08/09/2023	3:40 pm	Ophthalmology
30	+12175173878	en_US	SMS	Paul	Clark	08/09/2023	2:50 pm	Orthopedics

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The file must have an initial row of column headings. The following columns in the file are important and, if present, the column heading must be exactly as specified here. Columns with an asterisk (*) are mandatory.

Column	Description
phone_number *	The file must contain a valid phone number for each recipient. The column must be called **phone_number**. Conductor supports: • Internationally formatted numbers, such as +1 233 2445 5678 or +44 7844 234234. • Locally formatted numbers such as (327) 603-4982 or 07344 544633.
language	When a language field is included, the system automatically creates a tab in the **Create campaign** window to configure a message for each language listed in the file. If the language is not present, Conductor uses the system default language, for example, en_US or en_GB. If present, the column must be called **language**.
send_method	Determines whether the recipient receives a text message (SMS) or voice call (IVR) for the campaign. If not supplied, Conductor sends SMS messages by default. If present, the column must be called **send_method**.

When Conductor uploads the file, it includes all the other columns in the file as merge fields. It uses the column heading as the name of the merge field. In this example file, the merge fields are **First**, **Last**, **Date**, **Time**, and **Dept**. You can drag and drop these merge fields into the message content.

All fields in the initial upload file are included in the report output - see *Campaign reports (page 21)*. For this reason, you may want to include some identifiers, such as MRN or account number. You are unlikely to use these in the message body but you can use them to match patients if you intend to upload the report results to another system.

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Start using campaign builder

Your user profile may go directly to the **Campaign Builder** page when you log into Conductor.

If not, select **Campaign Builder** in the **Communication** menu on the **Configuration** page. The **Campaign Builder** page displays.

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Campaigns

The **Campaign Builder** page displays a table of existing campaigns. On this page, you can:

- Create a new campaign - see *Create a new campaign (page 7)*.
- Search for an existing campaign - see *Search for a campaign (page 17)*.
- Edit an existing campaign - see *Update a campaign (page 18)*.
- Schedule a campaign - see *Schedule a campaign (page 19)*.
- View campaign reports - see *Campaign reports (page 21)*.

Create a new campaign

After you have created your upload file, you can create the new campaign to send messages to the recipients in the file.

To create a new campaign, you must:

- Set up the information about the campaign - see *Set up campaign details (page 8)*.
- Create the SMS and/or IVR message content that contains the information that you want to send to patients - see *Create a new campaign message (page 11)*.

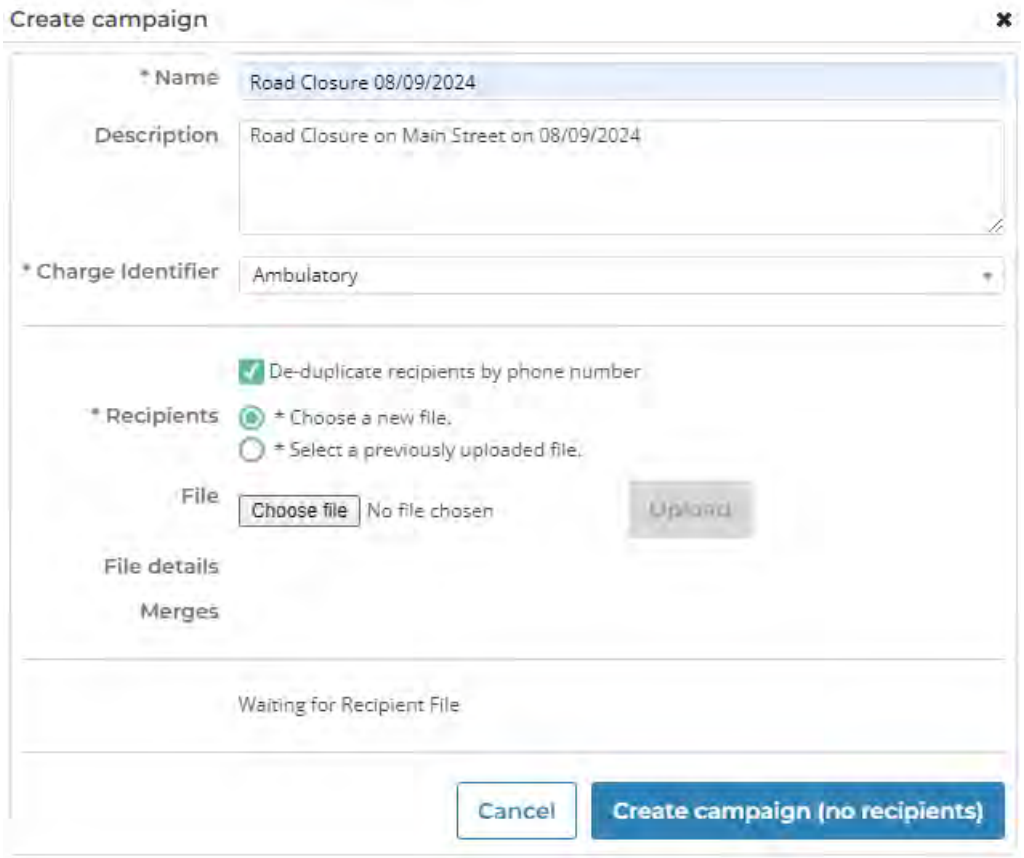
  Alternatively, you can use an existing message from another campaign - see *Use an existing campaign message (page 17)*.
- Save the new campaign - see *Create the campaign (page 17)*.

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Set up campaign details

To set up the details for a new campaign:

1. Click **Create campaign** in the top right of the **Campaign Builder** page. The **Create campaign** window displays.



2. Enter a name for the campaign and a description.

3. Select the charge identifier that you want the campaign to use. This is used in billing reports to attribute the costs of a campaign to the appropriate department or cost centre. Lumeon obtains and configures the available values.

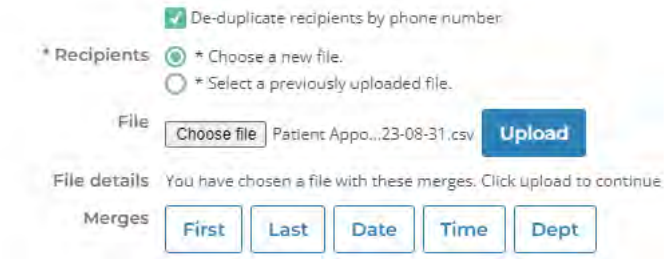
4. Select **De-duplicate recipients by phone number** if you want to remove duplicate messages to the same phone number. For example, if you are sending a weather alert to all patients who have appointments tomorrow, this checkbox ensures that patients with multiple appointments only receive one alert. If the same phone number is recorded in a different format, for example, (717) 334 2121 and 717-334-2121, the messages are not de-duplicated.

   Leave it clear if you want phone numbers to receive more than one message. For example, if your campaign is to remind patients about overdue outstanding balances and a patient has multiple visits with outstanding balances, you might want them to receive a message for the outstanding balance on each appointment.

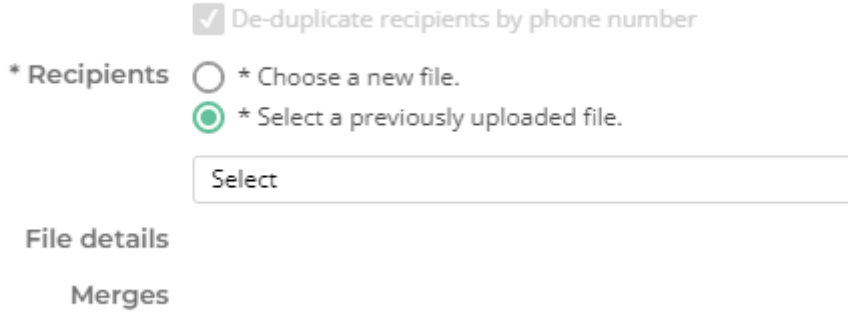
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5. You can choose a new file or you can use a file which has previously been uploaded.

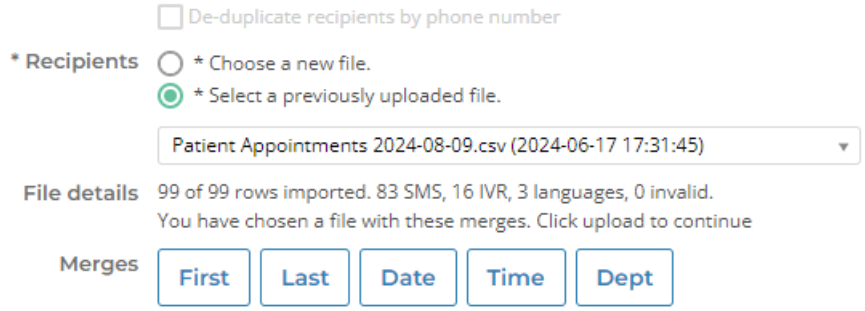
   If you selected the **Choose a new file** option, click the **Choose file** button, navigate to the file on your computer and select it, then click **Upload** to upload the file.



   If you selected the **Select a previously uploaded file** option, click **Select** and choose the file from the drop-down list. The file names show the date and time that they were first uploaded to help you choose the correct file. You can also start typing in the **Select** box to narrow down the list of options.



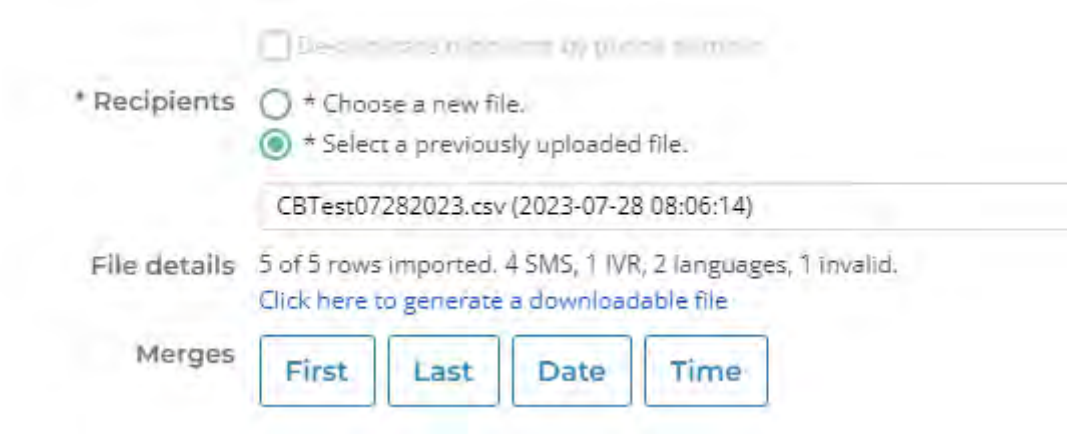
   After you have selected a file and uploaded it (if it is a new file) and if the file is valid, Conductor processes the file. It displays the number of rows, the number of SMS and IVR messages, the number of languages, and the number of valid records. Conductor does not send messages for invalid records in the upload file.



   If the file is invalid, for example, it is not a CSV file or the **phone_number** field is missing, Conductor does not process it and displays an error message explaining the problem.

   If the file is valid but some entries are not valid, the system notes the number of invalid entries but proceeds to process the rest of the file. One example of an invalid entry is a row in the file with a language specified that is not configured in your system. You can click **Click here to generate a downloadable file** to see a list of invalid entries and the reasons that they are invalid.

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Conductor also creates a merge field for every column in the upload file other than the phone number, language, and send method columns. When you create the message templates, you can drag and drop these into the templates. When Conductor sends the messages, it replaces the merge fields with the actual values from the upload file.

Conductor uses the file content to determine which fields to make available for message content. For example, it only shows IVR message fields if at least one recipient in the file has a send method of IVR. Given this, the message content fields do not appear in the campaign creation window until after you have uploaded a file.

Campaign detail fields

Set up the campaign details using the fields in the following table. Fields with an asterisk (*) are mandatory.

Field	Description
Name *	Enter the name of the campaign.
Description	Enter a description of the campaign.
Charge identifier *	Select the charge identifier that you want the campaign to use. This is used in billing reports to attribute the costs of a campaign to the appropriate department or cost centre. Lumeon obtains and configures the available values.
De-duplicate recipients by phone number	Select if you want to remove duplicate messages to the same phone number. For example, if you are sending a weather alert to all patients who have appointments tomorrow, this checkbox ensures that patients with multiple appointments only receive one alert. If the same phone number is recorded in a different format, for example, (717) 334 2121 and 717-334-2121, Conductor does not de-duplicate the messages. Leave it clear if you want phone numbers to receive more than one message. For example, if your campaign is to remind patients about overdue outstanding balances and a patient has multiple visits with outstanding balances, you might want to send a message for the outstanding balance on each appointment.
Recipients *	Select one of the two options: · **Choose a new file** - Select this if you want to use a new file of recipients in your campaign. If you selected **Choose a new file** above, click **Choose file**, navigate to the file of recipients that you want to use, and then click **Upload**. The file must be in CSV (comma-separated variable) format - see *Campaign upload file (page 4)* for more information. · **Select a previously uploaded file** - Select this if you want to use a file that has already been uploaded for another campaign. Click **Select** and choose the file from the drop-down list. The file names show the date and time that they were first uploaded to help you choose the correct file.
File details	Conductor processes the upload file that you have selected and displays the number of rows, the number of SMS and IVR messages, the number of languages, and the number of valid records in the file.
Merges	When Conductor processes the upload file, it shows the merge fields that it found in the file. You can drag and drop these merge fields into the SMS and IVR message content.

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Create a new campaign message

When you upload a new file or select a previously uploaded file, Conductor displays the fields for creating the new campaign message. This includes the merge fields that Conductor has extracted from the columns in the upload file.

If Conductor detected SMS and IVR send methods in the upload file, it displays tabs for SMS and IVR so that you can create messages for both options. If only one send method is present in the upload file, it only displays a tab for that option. If the send method is not specified in the upload file, Conductor sends SMS messages and it only displays an SMS tab. Similarly, Conductor displays a tab for each language that is detected in each send method.

Follow the steps below to create a new campaign message for SMS and IVR.

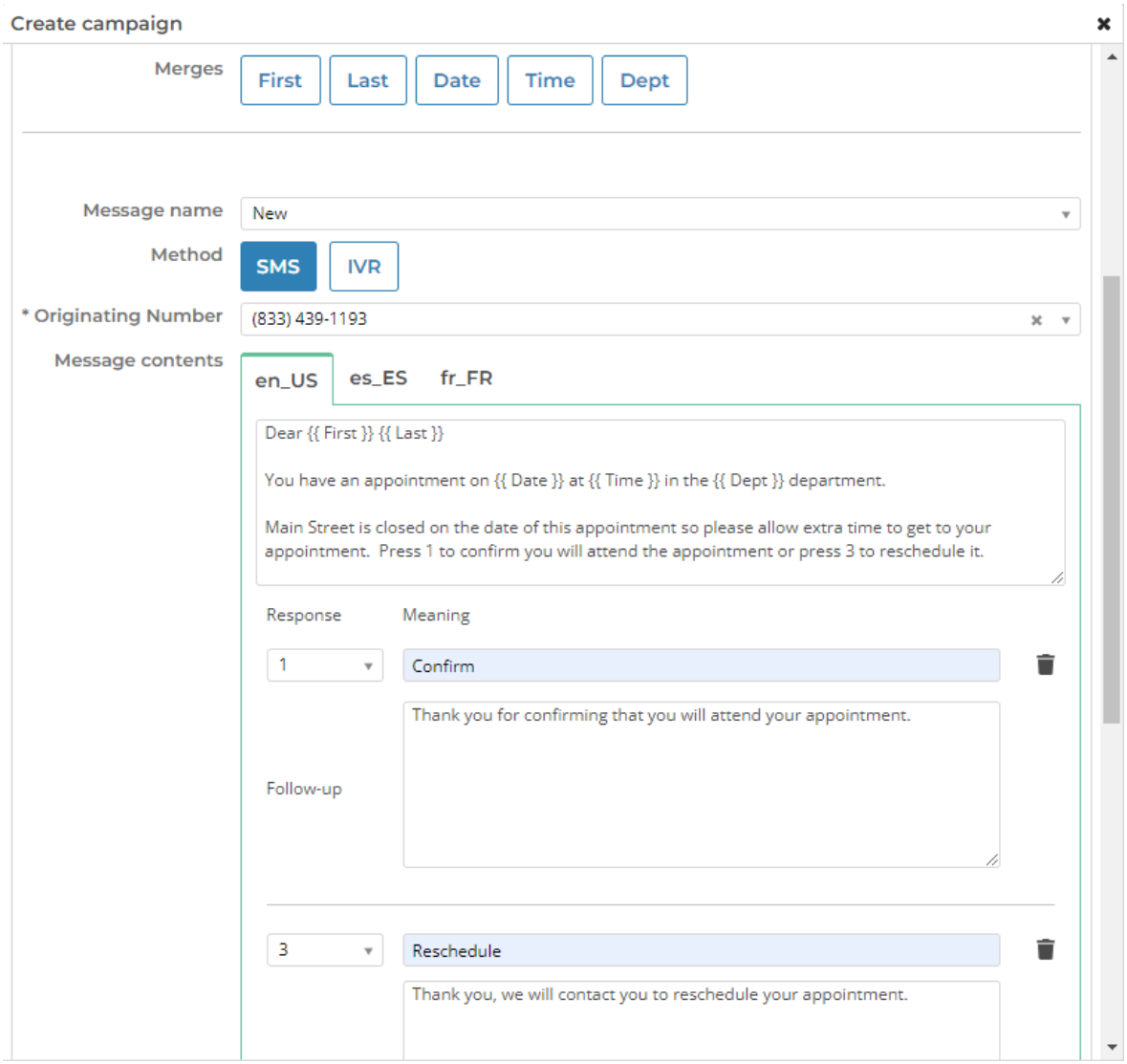
Create new SMS message content

If your upload file includes SMS messages, you must create SMS message content for all the languages present in the upload file.

1. Conductor automatically displays the tab for SMS. Enter the SMS campaign message content. For a complete list of the fields you need to create new IVR message content, see *Campaign message content fields (page 16)*.

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2. If you are entering new SMS message content, select the correct originating number from the drop-down list. This is the number that recipients see for text messages. Your system may be configured to display an actual phone number or you may have labels that are mapped to phone numbers in the background.



For a complete list of the fields you need to create new SMS message content, see *Campaign message content fields (page 16)*.

3. A tab displays for all the languages present in the upload file. Conductor includes a tab for the system default language even if none of the records in the uploaded file use this language. This enables you to have documentation of the message in the system language. Enter the message text in each language tab. Drag and drop the merge fields into the message to use the variable text from the records in the upload file.

   To comply with the Telephone Communication Protection Act (TCPA) rules, you must include an opt-out option in SMS messages, for example:

   ```
   Please reply STOP to opt out of future messages.
   ```

   If Conductor receives an SMS opt-out request, it updates the opt-out list for all patients with the same phone number that the request was issued from so that they will no longer receive SMS messages from Conductor.

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4. Enter the responses that a patient can make to the message they receive. This step is optional. You can create a campaign with no response options.

   You can enter as many of the available responses as you want. For each response:

   a. Click **Add response** to add a response to your message. Then select a response from the drop-down list. The options are:

      - **Numbers 0-9 and characters * and #** - Use these for the responses you want from recipients.

      - **?** - Available in SMS messages only. Use this to enter the follow-up response you want to send if the recipient enters an invalid or unexpected response. For example, if the options are 1 and 3 and the recipient responds with 7.

   b. Enter a meaning for the response, such as **Confirm** or **Reschedule**.

   c. Enter any follow-up message that you want Conductor to send to the patient. For example, if the patient has responded **1** to confirm they will attend an appointment, the follow-up message might be:

      ```
      Thank you for confirming your appointment.
      ```

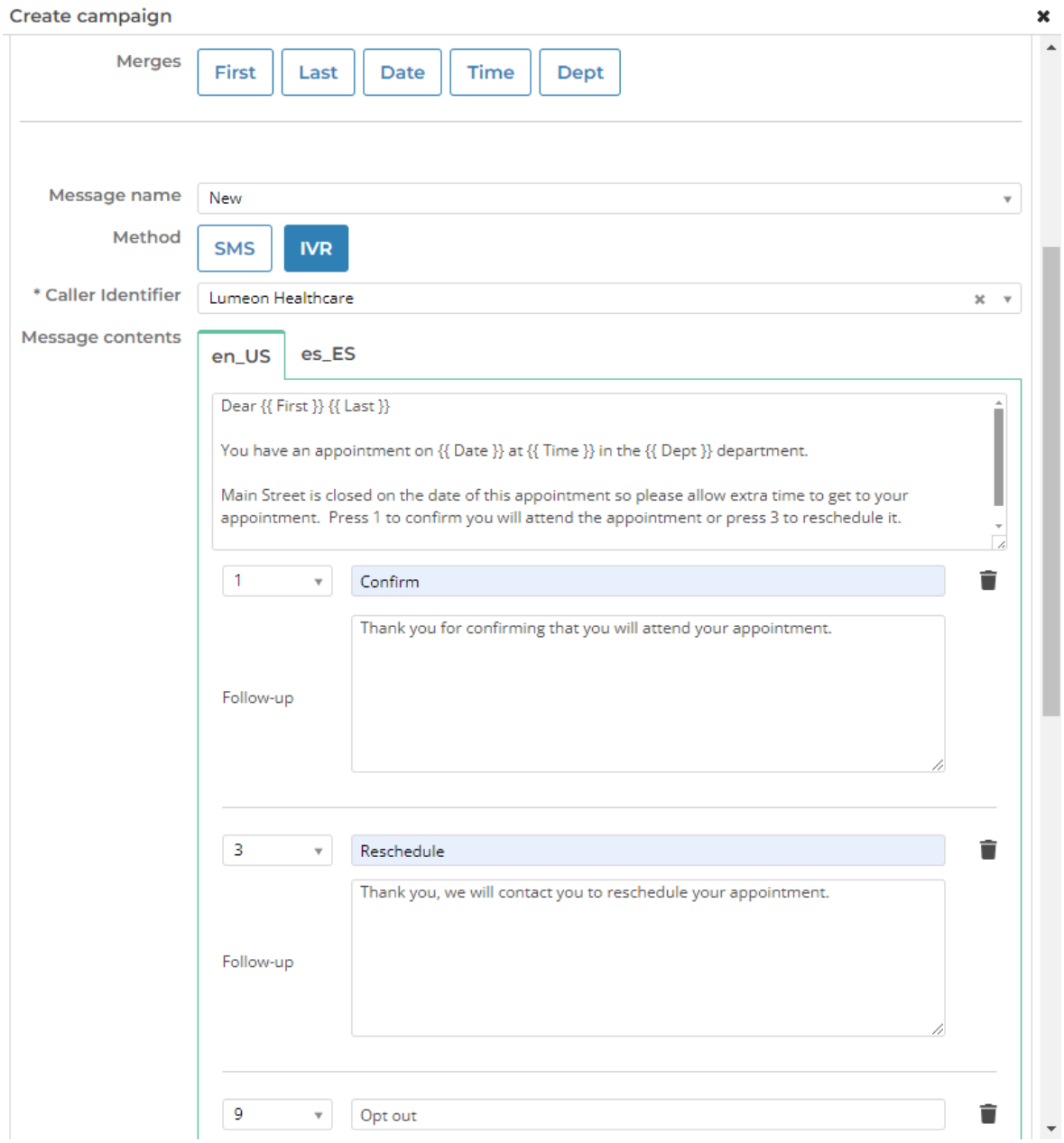
5. Add the message content and responses for all the SMS language tabs.

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Create new IVR message content

If your upload file includes IVR messages, you must create IVR message content for all the languages present in the upload file:

1. Click **IVR** to enter the IVR campaign message content.



   For a complete list of the fields you need to create new IVR message content, see *Campaign message content fields (page 16)*.

2. If you are entering new IVR message content, select the correct caller identifier from the drop-down list. This is the calling number that appears on the patient's phone. This could be an actual phone number or a label mapped to a phone number.

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3. A tab displays for all the languages present in the upload file. Conductor includes a tab for the system default language even if none of the records in the uploaded file use this language. This enables you to have documentation of the message in the system language. Enter the message text in each language tab. Drag and drop the merge fields into the message to use the variable text from the records in the upload file.

   You should also include an opt-out option in IVR messages, for example:

   ```
   Press 9 to opt out of future messages.
   ```

   If Conductor receives an IVR opt-out request, it records it in the campaign report so that you can process this later.

4. Enter the responses that a patient can make to the message they receive. This step is optional. You can create a campaign with no response options.

   You can enter as many of the available responses as you want. For each response:

   a. Click **Add response** to add a response to your message. Then select a response from the drop-down list. The options are:

      - **Numbers 0-9 and characters * and #** - Use these for the responses you want from recipients.
      - **Other** - Available in IVR messages only. Use this to enter the follow-up response you want to send if the recipient enters an invalid or unexpected response. For example, if the options are 1 and 3 and the recipient responds with 7.
      - **Timeout** - Available in IVR messages only. Use this to enter the follow-up response you want to send if the recipient takes too long to respond to the message.

      For example, if the campaign message tells the patient of road closures that may make it difficult for them to get to their appointment, the responses might be:

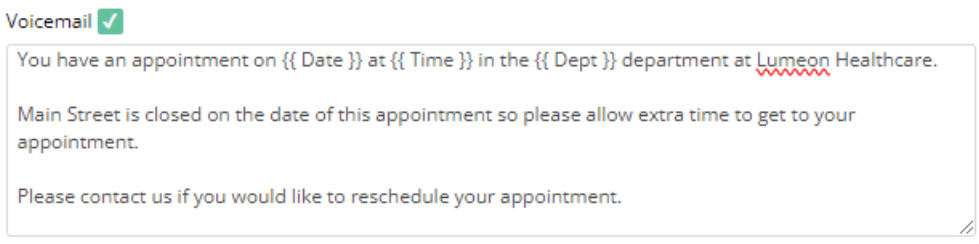
      - 1 = Confirm
      - 3 = Reschedule
      - 9 = Opt out

   b. Enter a meaning for the response, such as **Confirm** or **Reschedule**.

   c. Enter any follow-up message that you want Conductor to tell the patient. For example, if the patient pressed **1** to confirm they will attend an appointment, the follow-up message might be:

      ```
      Thank you for confirming your appointment.
      ```

5. Select the **Voicemail** checkbox if you want to add a different message that will be left if the IVR speech system detects that the phone has gone to voicemail. Enter the text for the voicemail message.

6. Add the message content, responses, and voicemail messages for all the IVR language tabs.

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Campaign message content fields

Create the campaign message content using the fields in the following table. Fields with an asterisk (*) are mandatory.

Field	Description
Merges	When Conductor processes the upload file, it shows the merge fields that it found in the file. You can drag and drop these merge fields into the SMS and IVR message content.
Message name	The system defaults to entering a new message. Leave this field blank if you want to create a new message. If you want to use an existing message in this campaign, click **Select** and select a message from the drop-down list. Once you have created your campaign message content, regardless of whether or not you have made any changes from a previously used campaign, you must change the name of the message in the **Save message as** field and click **Save message as** to save the new name. Each message can only be used with one campaign so we recommend that you give the campaign and the message the same name.
Method	Select **SMS** or **IVR** to set up the message template for that send method. If the records in the file that you uploaded only use one communication method, only that method displays here.
Originating number	Displays for SMS templates only. Select the originating number. Displays for SMS templates only. Select the originating number from the drop-down list that you want the campaign to be sent from. This is the number that recipients will see for text messages. Your system may be configured to display an actual phone number or you may have labels that are mapped to phone numbers. Lumeon obtains and configures the available phone numbers.
Caller identifier	Displays for IVR templates only. Select the call identifier from the drop-down list. This is the calling number that appears on the patient's phone. Again, this could be an actual phone number or a label mapped to a phone number. Lumeon obtains and configures the available phone numbers.

Message contents	A tab displays for all the languages present in the upload file. Conductor includes a tab for the system default language even if none of the records in the uploaded file use this language. This enables you to have documentation of the message in the system language. Enter the message text in each language tab. Drag and drop the merge fields into the message to use the variable text from the records in the upload file.
	
	To comply with the Telephone Communication Protection Act (TCPA) rules, you must include an opt-out option in SMS messages, for example:
	
	`Please reply STOP to opt out of future messages.`
	
	If Conductor receives an SMS opt-out request, it updates the opt-out list for all patients with the same phone number that the request was issued from so that they will no longer receive SMS messages from Conductor.
	
	You should also include an opt-out option in IVR messages, for example:
	
	`Press 9 to opt out of future messages.`
	
	If Conductor receives an IVR opt-out request, it records it in the campaign report so that you can process this later.

Add response	Click **Add response** to add a response to your message. Then select a response from the drop-down list. The options are: · **Numbers 0-9 and characters * and #** - Use these for the responses you want from recipients. · **?** - Available in SMS messages only. Use this to enter the follow-up response you want to send if the recipient enters an invalid or unexpected response. For example, if the options are 1 and 3 and the recipient responds with 7. · **Other** - Available in IVR messages only. Use this to enter the follow-up response you want to send if the recipient enters an invalid or unexpected response. For example, if the options are 1 and 3 and the recipient responds with 7. · **Timeout** - Available in IVR messages only. Use this to enter the follow-up response you want to send if the recipient takes too long to respond to the message. You can add as many of the available responses as you want.
Meaning	Enter a meaning for the response, such as **Confirm** or **Reschedule**.

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Field	Description
Follow-up	Enter any follow-up message that you want Conductor to send to the patient. For example, if the patient has responded **1** to confirm they will attend an appointment, the follow-up message might be: `Thank you for confirming your appointment.`
Voicemail	For IVR messages only. Select if you want to add a different message that will be left if the IVR system detects that the phone has gone to voicemail. Enter the text for the voicemail message.

Use an existing campaign message

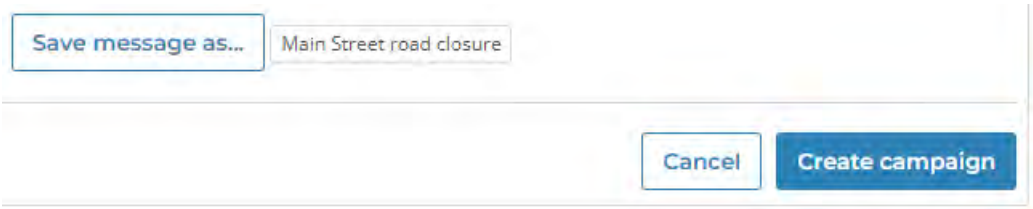
You can use an existing message that was created for a different campaign. If you want to do this, click **Select** in the **Message name** field and select the message in the drop-down list. You can also type in the **Select** field to narrow down the list of previous campaigns.

Even if you have not made any changes to the originating number, caller identifier, or message content, you must change the name of the message in the **Save message as** field and click **Save message as** to save the message content under a new name. Each message name can be associated with only one campaign.

Click **Create campaign** to save the campaign. The **Create Campaign** window closes and the full list of campaigns displays. You can now schedule the campaign - see *Schedule a campaign (page 19)*.

Create the campaign

When you have entered all the SMS and IVR message content, enter a unique name for the message and click **Save message as**. Each message can only be used with one campaign so we recommend that you give the campaign and the message the same name.



Click **Create campaign** to save the campaign. The **Create Campaign** window closes and the full list of campaigns displays. You can now schedule the campaign - see *Schedule a campaign (page 19)*.

Search for a campaign

You can search for a campaign if you want to update it or schedule it.

Start typing the name of the campaign in the **Name** field and a list of campaigns that match the entered text is displayed. You can then select the appropriate campaign.

If you have more than one page of campaigns, you can use the following options to find the campaign that you want:

- **First** - Click to display the first page of campaigns.
- **Previous** - Click to display the previous page of campaigns.

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- **[Number]** - Click on a number to display that page of campaigns.
- **Next** - Click to display the next page of campaigns.
- **Last** - Click to display the last page of campaigns.

Campaign statuses

In the table of campaigns, the **Send status** column can display the following options:

- **Sending** - Conductor is sending messages for the campaign.
- **Sent** - Conductor has sent all the messages for the campaign.
- **Not scheduled** - The campaign has not been scheduled to send any messages.
- **Errors in sending** - The campaign has started but has not completed because it encountered errors.

For campaigns with a **Send status** of **Sending**, **Sent**, or **Errors in sending**, you can click **Reports** to view a report of the campaign - see *Campaign reports (page 21)*.

The **Schedule** column can display the following options:

- **Not ready to send** - Hover over this status to see why the campaign is not ready to be scheduled. For example, this could be because you have not finished setting up the campaign message content for all the languages in the upload file.
- **Schedule** - You can click this to schedule the campaign - see *Schedule a campaign (page 19)*.
- **Sending** - Conductor is sending messages for the campaign.
- **Sent** - Conductor has sent all the messages for the campaign.

Update a campaign

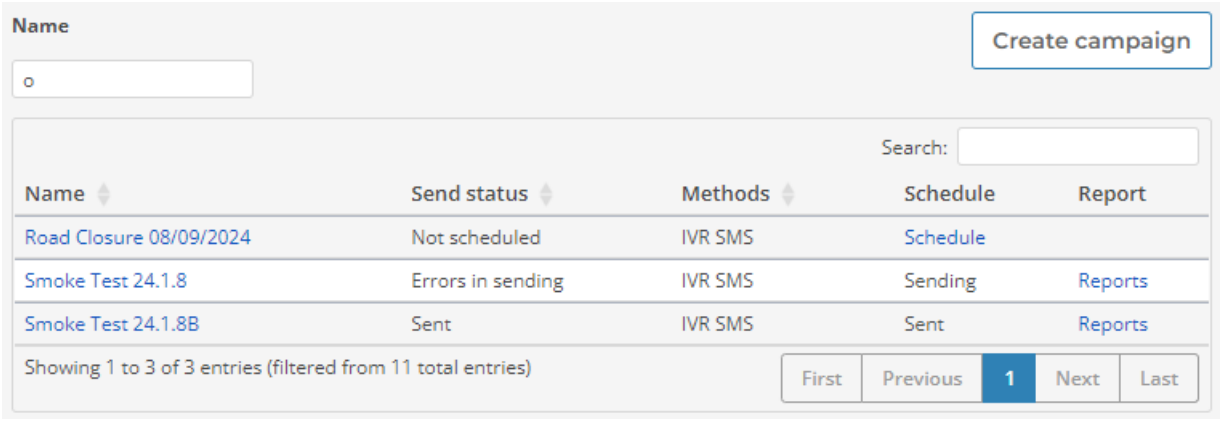
To update a campaign:

1. Select the name of the campaign in the table. This displays the campaign in the **Update campaign** window.
2. Make the required changes to the campaign. See *Campaign detail fields (page 10)* for information on the fields in the **Update campaign** window.
3. If you make any changes to the SMS or IVR message contents, to the originating number, or the caller identifier, click **Save message**.
4. Click **Update campaign**.

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Schedule a campaign

Once you have completely set up your campaign, so that it has a **Send status** of **Not scheduled** and a **Schedule** status of **Schedule**, you can schedule it.



If a campaign is not completely set up, its **Send status** is **Not scheduled** and the **Schedule** status is **Not ready to send**. Hover over the status **Not ready to send** to see why the campaign is not ready to be scheduled.

To schedule a campaign:

1. Click **Schedule** in the row of the table for the campaign you want to schedule. This displays the **Update campaign schedule** window with the name and description of the campaign.



2. Select one of the following options:
   - **ASAP** - Runs the campaign as soon as possible.
   - **Choose date/time** - Enter a start date and time and an end date and time when you want the campaign to run. This enables you to control when messages or phone calls are sent. Most campaigns should complete in minutes so if you set a large send window, the campaign will probably end early. It does not spread out across the available time window. The purpose of the end time is to ensure messages are not sent outside of standard call windows. For example, you may want to set a finish time of 9 pm to make sure that patients do not receive late phone calls if something goes wrong or if you start a campaign later in the evening.

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3. Click **Submit** to schedule the campaign. If you have not run any campaigns in the last six hours, the campaign builder process may take up to 15 minutes (typically less) to start before the campaign starts running.

   Once started, campaigns send 20 SMS per second and 2 IVR calls per second.

If you schedule a campaign to start in the future or it has not yet started, the **Schedule** status changes to **Reschedule**. You can click **Reschedule** to change the date and time that the campaign starts.

When the campaign is running, the **Schedule** status is **Sending**.

When the campaign has run, the **Schedule** status changes to **Sent**.

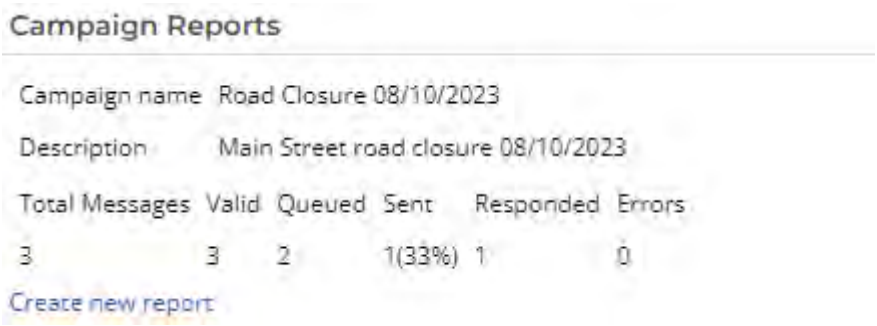
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Campaign reports

When a campaign is sending or after it has completed, you can view the campaign report.

To do this, click **Reports** in the line of the campaign that you want to view the report for.

The top of the campaign report shows a snapshot of the campaign status.



Click **Create new report** to generate a downloadable detailed report of the campaign. You can select **Create new report** multiple times. For example, you may want to rerun the report to see if you have received any more responses to the messages you sent out.



Click **Download** to download the report as a CSV file for further analysis. The file includes details for all the rows in the upload file with the date and time the message was sent, whether a response was received, whether that response was valid, and if there were any errors. For example, you may want to examine the report for patients who have cancelled their appointment so you can update their appointment in the scheduling system and contact them to rearrange it. Note that these cancellations are not automatically integrated into the scheduling system. However, you can use the download file to upload the updates to the originating system.

The downloadable report includes all the columns that were in the initial upload for the campaign. You may want to include some identifying data, such as MRN or account number, in the upload file so that you can have that available in the download for reconciliation. Items in the upload file do not have to be included in the message content in order to appear in the report.

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Other campaign builder functions

Charge identifiers

Conductor uses charge identifiers to attribute messages in a campaign to the appropriate cost centre. If you need a new charge identifier, contact your system administrator or Lumeon Support.

Caller identifiers

You specify a caller identifier when you create IVR message content for a campaign. If you need a new caller identifier, contact your system administrator or Lumeon Support.

Originating numbers

You specify an originating number when you create SMS message content for a campaign. If you need a new originating number, contact your system administrator or Lumeon Support.

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Troubleshooting

There are several common problems that may occur when setting up and running a campaign.

Upload file structure

The following common problems may occur with the upload file structure:

- Phone number
  - If there is a row with a missing phone number, the file may stop uploading. It uploads 1,000 rows at a time, so it stops when it hits a 1,000 row batch that includes a missing phone number. If this occurs, correct the file and upload it again.
  - If the system location is in the United States but the file includes a non-US area code, the file still uploads but the row containing that number is ignored.
- Language
  - If a language code included in the file is not configured in your instance of Conductor, the file still uploads but the row containing that code is ignored.
- Upload file name
  - Every file must have a unique name that is different from any previously uploaded files. You can append the date to the name of the file to ensure that it is unique.
  - Conductor does not support some special characters in the upload file name. If the file name contains the character **#**, the file does not upload.

Message status details

A message generated by the campaign builder goes through several touchpoints before it reaches the recipient. This is the typical path of a message:

1. Lumeon Conductor
2. Mirth - our integration engine
3. Vonage - our communications vendor
4. Carriers - the patient/recipient vendors, such as T-Mobile or Verizon.
5. Recipient's phone

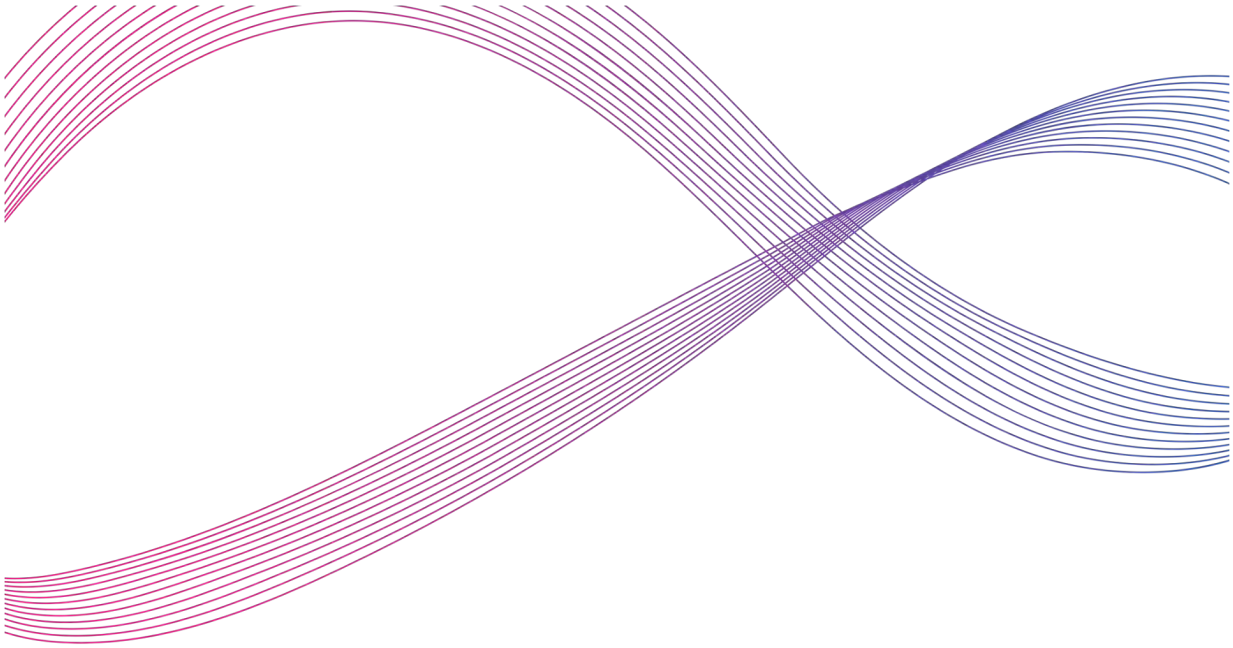
The statuses of messages in Conductor are generic categories but more detailed errors can be requested from Vonage. If you have a campaign with errors, contact Lumeon Support and we can help you investigate.

Conductor error	Example issues
Error sending message	SMS to a landline, number blocks automated messages, inactive phone account
Message queued for sending	Awaiting delivery receipt from a carrier, out of network
Outside the send window	Message not processed by Mirth before the end of the send window

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Conductor error	Example issues
Unknown response received	The recipient replied with unexpected response. Either the campaign had not expected responses or the patient replied with something not configured.

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Classes & Booklets in Lumeon Conductor 24.2

Issued by: Lumeon Learning
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Introduction

Lumeon Conductor enables users to set up classes so that patients can then be booked in to attend them. Users can also set up booklets for patients to buy and use.

Classes

You can use Lumeon Conductor to book patients into classes, such as Pilates, yoga, or physiotherapy.

Before you can do this, you must create class settings, each class type, and then add them to the relevant contract(s) to ensure the product is accessible to patients.

Booklets

Booklet functionality enables a selection of multiple classes and/or appointments to be sold as a package, which you can offer at a discounted price. For example, if an individual yoga class usually costs £30, you could offer a booklet of 10 classes for a discounted price of £250.

You can assign booklets to a patient through the normal purchase of the item. As a patient uses the booklet, Conductor performs a countdown to track how many of these appointments or classes remain available.

Purpose

The purpose of this document is to explain how to set up classes and booklets. This includes:

- Setting up classes - see *Create classes (page 4)*.
- Adding classes to a diary and cloning a class - see *Create classes in a diary (page 10)*.
- Adding patients to a class - see *Book patients into a class (page 12)*
- Creating booklets - see *Create a booklet type (page 18)*.
- Adding a booklet to a patient's account - see *Add a booklet to a patient's account (page 19)*.
- How a patient uses a booklet - see *Use booklets (page 19)*.

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Classes

Create classes

You can book patients to attend classes, such as Pilates, yoga, or physiotherapy.

Before you can do this, you must:

- Set up the required class settings - see *Create a class setting (page 4)*.
- Create the different class types - see *Create a class type (page 5)*.

Create a class setting

You can set up different settings for classes that your organization offers, such as At Home, In Clinic, or On Phone.

To create class settings:

1. Select **Appointments and Class Settings** in the **Runtime Options** menu. The **Appointment and Class Settings** page displays.
2. In the **Create Appointment Setting** form, enter the details for the class setting using the table in *Class setting fields (page 4)*.
3. Click **Create**. The new class setting displays in the table of **Appointment and Class Settings**.

Class setting fields

Using the **Create Appointment Setting** form, complete each of the following fields. Fields with an asterisk (*) are mandatory.

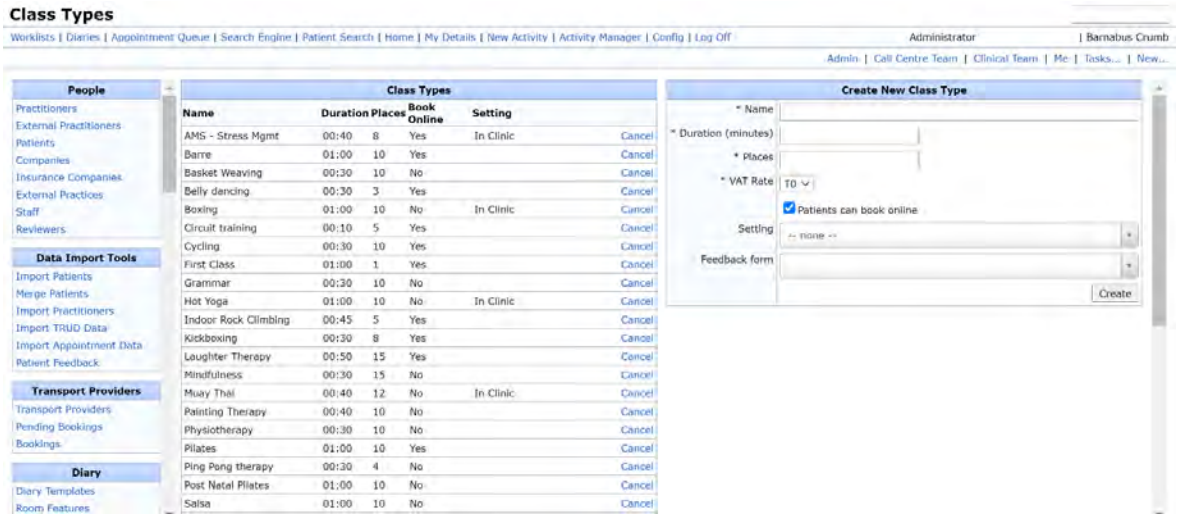
Field	Description
Name *	Name of the setting for the appointment or class. Conductor already includes some common appointment and class settings.
Active	Select this checkbox if you want the setting to be available immediately. If you leave it clear, you will not be able to use this setting until you select it and make it active.
Includes Phone	Select this checkbox if you want to include a phone number when the appointment or class setting is included in an appointment or class type.
Includes Video	Select this checkbox if you want to include a video link when the appointment or class setting is included in an appointment or class type.
Patient Introduction Text	Enter any text that you want to display for a patient when this setting is included in an appointment or class.
Practitioner Introduction Text	Enter any text that you want to display for a practitioner when this setting is included in an appointment or class.

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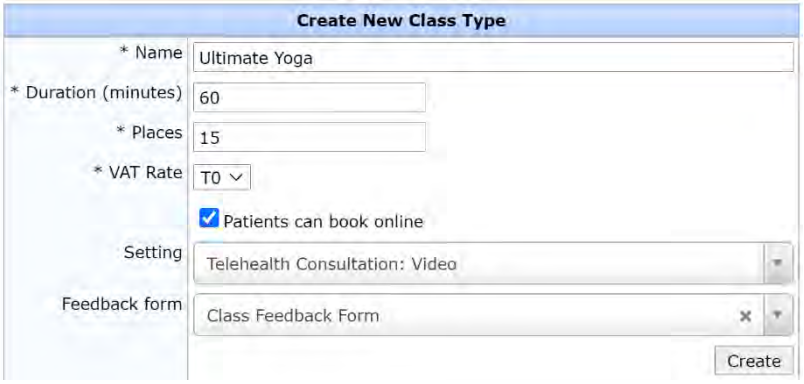
Create a class type

To create a new class type:

1. Select **Class Types** in the **Diary** menu, to display the **Class Types** page. A list of existing **Class Types** displays on the left and the **Create New Class Type** form displays on the right.



2. Complete the fields in the **Create New Class Type** form.



3. Once completed, click **Create**. The new class type is added to the table of class types.

Class type fields

Using the **Create New Class Type** form, complete each of the following fields. Fields with an asterisk (*) are mandatory.

Field	Description
Name *	Enter the name of the class.
Duration (minutes) *	Enter the duration of the class, in minutes. The entered value can be overridden when booking classes in the diary.
Places *	Enter the number of patients that can be booked into a class. The number can be overridden when booking a class in the diary.
VAT Rate *	Select a VAT rate from the drop-down list.
Patients can book online	Select this check box to enable patients to book through the Patient Portal.

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Field	Description
Setting	Select the class setting from the drop-down list, such as **At Home**, **In Clinic**, or **On Phone.** You can create additional class settings using the **Appointment and Class Settings** option in the **Runtime Options** menu - see *Create a class setting (page 4)*.
Feedback Form	Select the feedback form from the drop-down list. You can only see feedback forms if they have been set up.

Add a new product to existing contracts

Before you can use products, which include appointments and classes, you must apply a price to them and make them available on contracts.

To add a product to existing contracts:

1. Select **Wizards** in the **Products** menu.
2. Select **Add Product Wizard** in the **Wizards** menu.
3. Follow the four steps of the add product wizard.

Step 1 - select product

Start entering the product name. This works on an auto-complete system; enter part of the product to display matching products. Select the one that you want to add to one or more contracts.



Enter an effective date, or leave blank if the product should become effective immediately. You can add a product with retrospective effective dates.

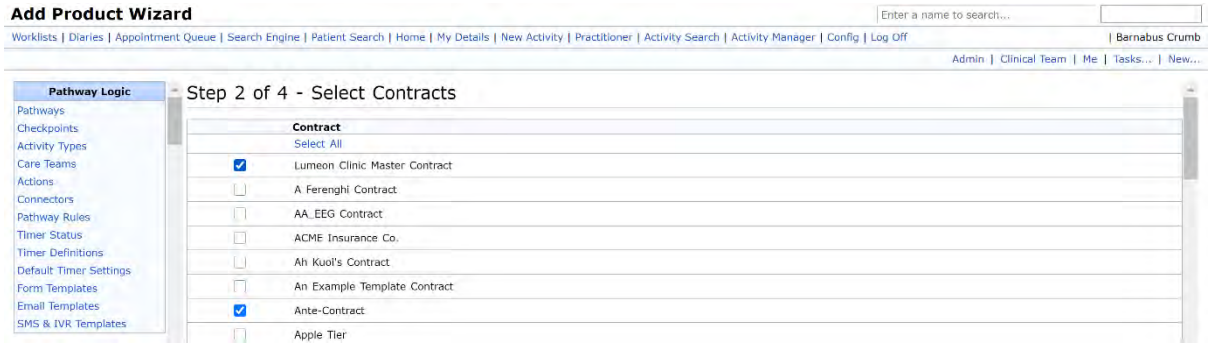
Conductor does not allow users to make bookings for products before the effective dates or after the product expiry date (if set). If no expiry date is set, the product is available indefinitely. Transaction dates can be before the effective date.

Click **Next**.

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Step 2 - select contracts

Select the contract(s) and/or template contract(s) that you want the product to be added to.

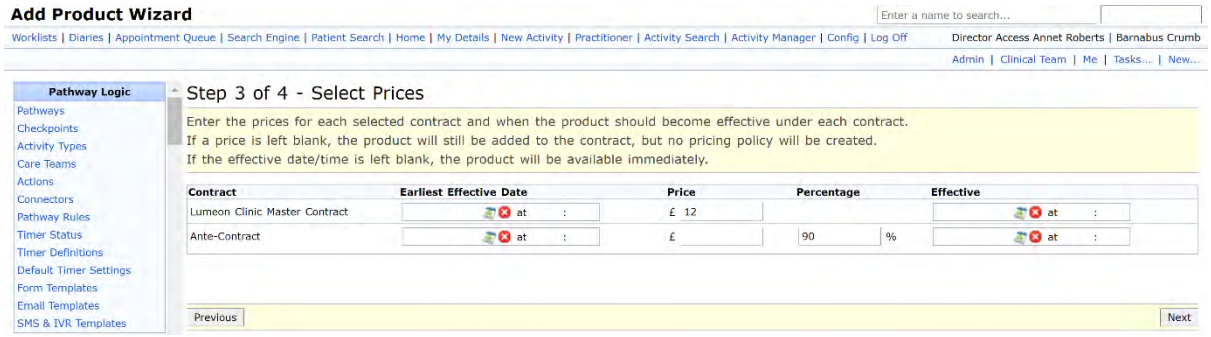


Click **Next**.

Step 3 - select prices

Enter the price for each selected contract and when the product should become effective under each contract. If a price is left blank, the product is still added to the contract, but no pricing policy is created.

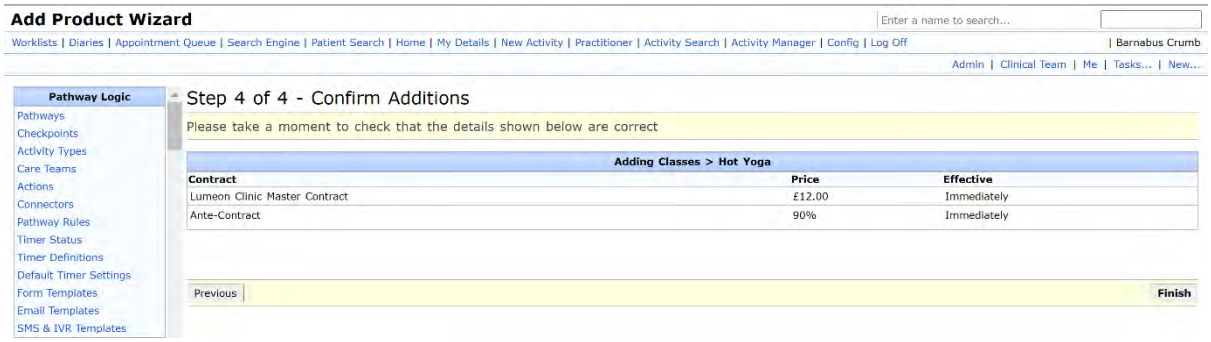
If the effective date/time is left blank, the product is available immediately.



Click **Next**.

Step 4 - confirm additions

Confirm that the product is being added to the correct contracts, and that the contract prices and the effective dates are correct.



Click **Finish** to complete adding the product to the contracts.

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Reprice a class

You may need to reprice a class if the prices change. To update the price of a class:

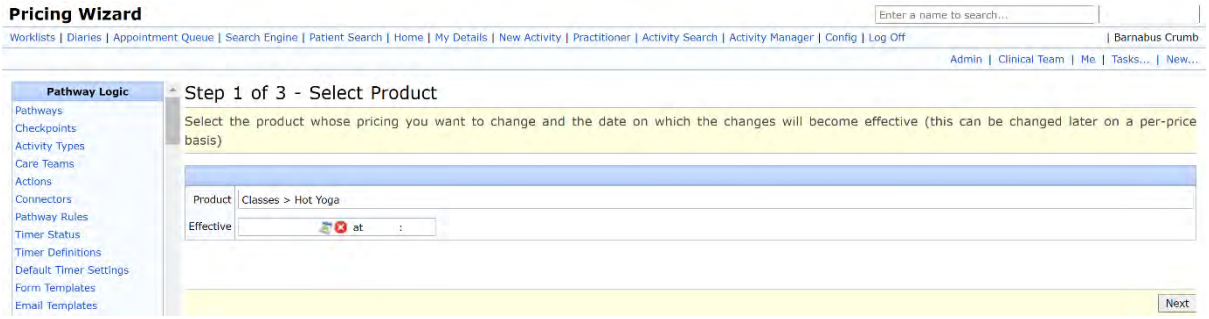
1. Select **Wizards** in the **Products** menu.
2. Select **Pricing Wizard** in the **Wizards** menu.
3. Follow the three steps of the pricing wizard.

Step 1 – select product

Start entering the class name. This works on an auto-complete system; enter part of the product to display matching products. Select the one that you want to add to one or more contracts.

Select the relevant class to update the price.

Enter an effective date and time. If the effective date and time is left blank, the product is available immediately.



Click **Next**.

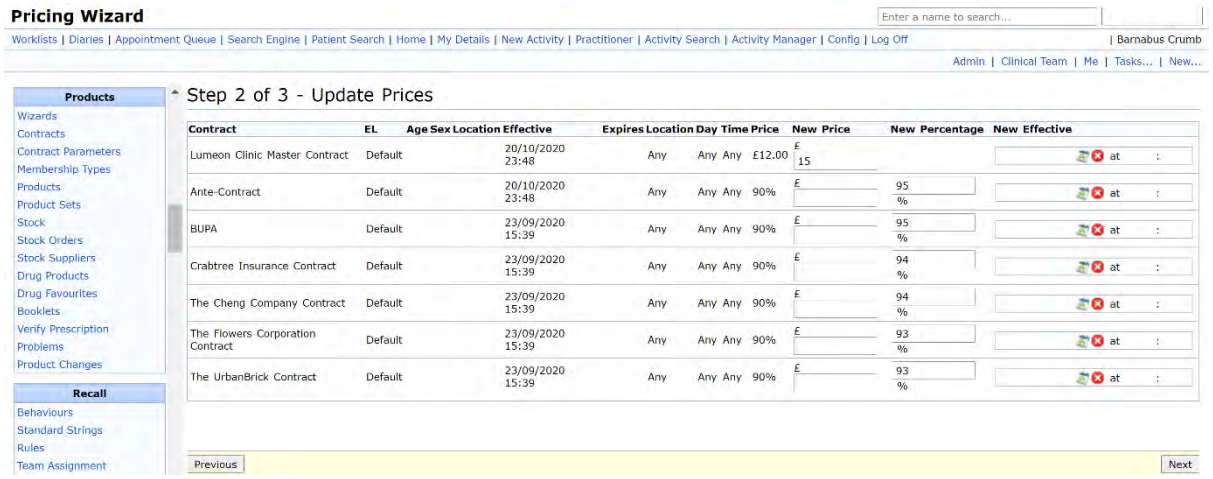
Step 2 – update prices

The contract(s) in which the class is already present are displayed so that you can increase or decrease the current price.

You can enter a nominal value in the **New Price** field or enter a percentage value in the **New Percentage** field.

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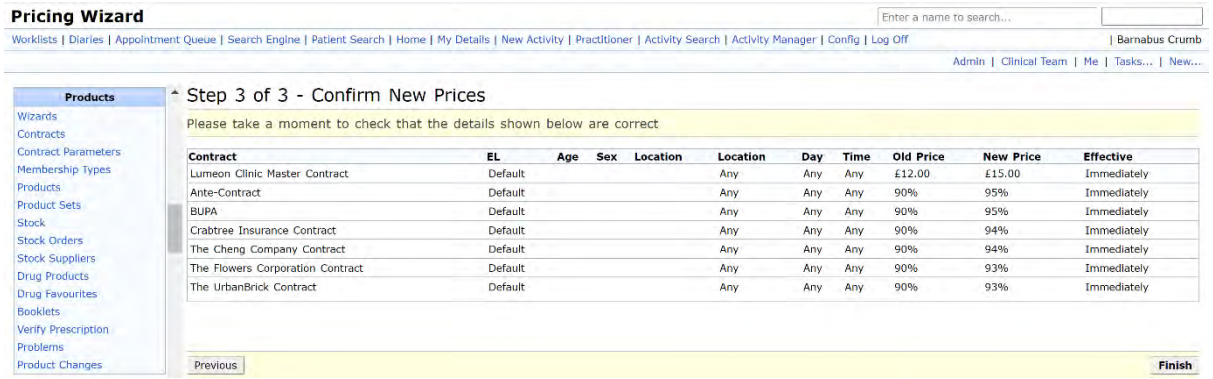
A date can be entered in the **New Effective** field. If no date is supplied the update takes effect immediately.



Click **Next**.

Step 3 - confirm new prices

Confirm the price or percentage changes for the class on each contract, and the effective dates.



Once verified, click **Finish** to complete the process. If you do not click **Finish**, no updates are made and you will have to repeat the process.

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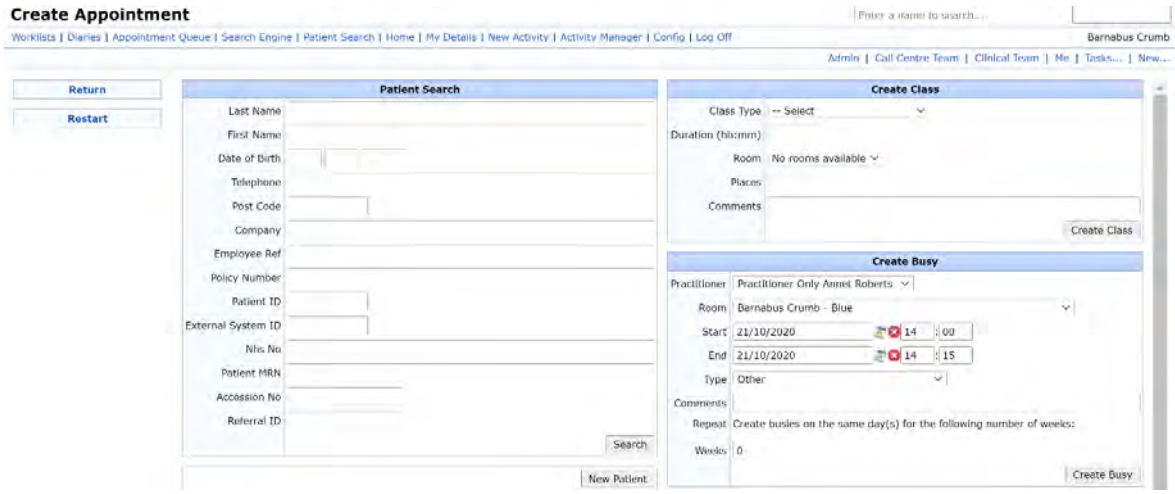
Create classes in a diary

There are two steps in the process to create classes in a diary. First you must create a class and then you must clone it to create a series of classes.

Create a class in a diary

To create a class in a diary:

1. Select a vacant time slot in an opened diary to display the **Create Appointment** page. The **Patient Search** form displays on the left of the **Create Class** page and the **Create Class** form displays in the top right of the page.



2. Enter the class details using the fields in the table below.

3. Click **Create Class** to add the class to the diary:



Once you have created the class, you must clone it to set up a series of classes.

Class details

Use the following table to complete the **Create Class** form:

Field	Description
Class Type	Select the class type from the drop-down menu.
Duration (hh:mm)	Duration of the class as set up in **Class Types**. See *Create a class type (page 5)*. You can override this, if necessary.
Room	Select the room where the class will be held.

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Field	Description
Places	Displays the number of available class places as set up in **Class Types**. See *Create a class type (page 5)*. You can override this, if necessary.
Comments	Comments entered here appear in the class details.

Clone classes

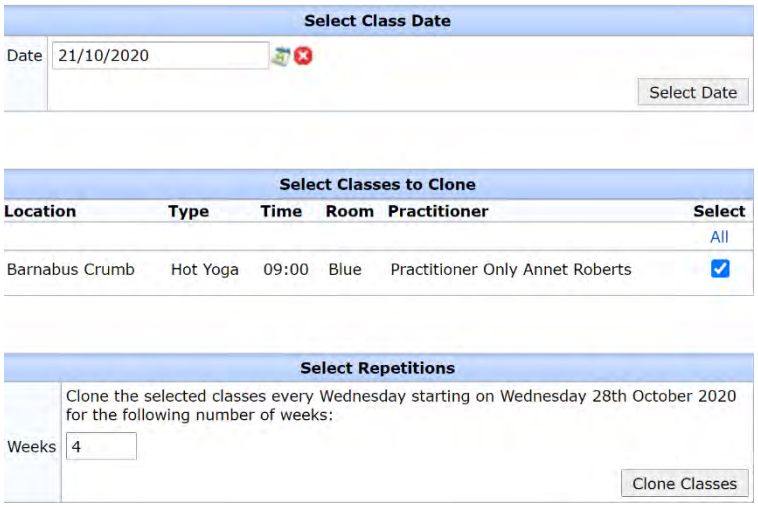
Conductor enables you to clone classes so that they are scheduled in the diary at the same time each week.

To clone a class in the diary:

1. Select the class name in the diary. The **Class Details** page is displayed.



2. Select **Clone Class** in the **Class** menu on the left of the page. The **Class Clone** page is displayed.



3. In the **Select Class Date** field, use the date picker to enter the date of the booked class and click **Select Date** to display a list of all classes that are availalble on the selected date.

4. In the **Select Classes to Clone** box, select the class or classes that you want to clone.

5. In the **Select Repetitions** box, enter the number of weeks for which the class or classes need to be cloned.

6. Click **Clone Classes**.

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Book patients into a class

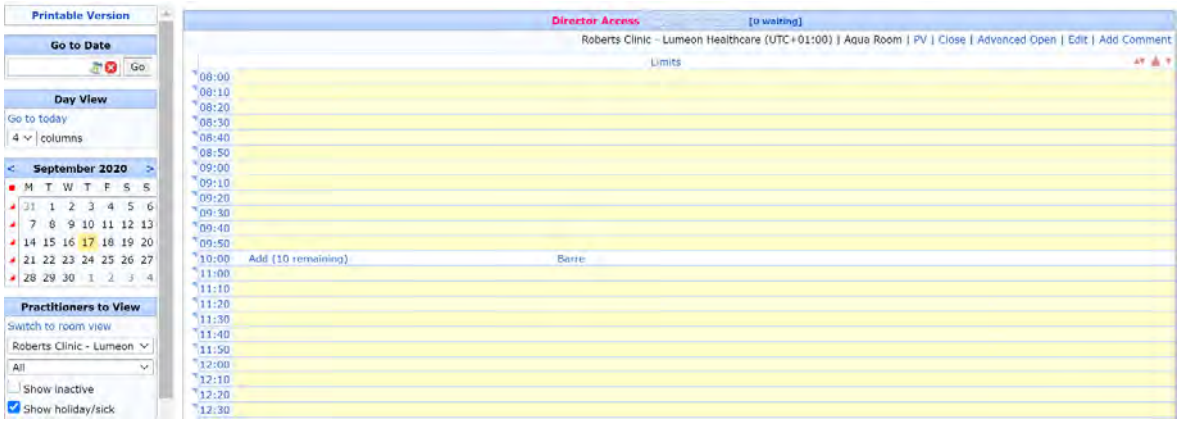
There are two ways that you can book patients into a class:

- Using the **Diary** - see *Book a patient into a class through the diary (page 12)*.
- Using the **Search Engine** - see *Book a patient into a class via the search engine (page 14)*.

Book a patient into a class through the diary

To book patients into a class using the diary:

1. Locate the class in an opened diary. The number displayed in brackets indicates the number of participants that the class is designed to accommodate. When adding patients to a class, the diary indicates how many spaces remain.



2. Click **Add** in the appointment slot. The **Class Details** page displays.



3. Use the **Patient Search** form on the right side of the **Class Details** page to search for and add patients to the class. Enter the search criteria, then click **Search** to display the patient results.

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4. Select the patient from the generated results, then complete and update the relevant details as shown in the image below and described in the table. Some fields may vary depending on your configuration.



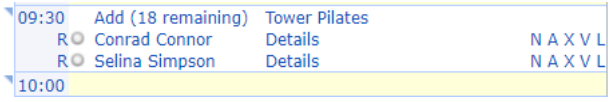
5. Complete the **Add Participant** form using the table below.

6. Click **Add Participant** to add the patient to the class. This action also updates the number of available class spaces in the **Class Details** page and the **Diary**.



7. Repeat if you need to add more participants to the class.

Click **Return** in the top left-hand corner of the page to return to the diary in which the class is booked.



To reschedule the patient into another class, click **R** next to the patient's name and then click on the time slot of the class that the patient is being moved to.

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To open the patient's EMR, click the patient's name. To display their details, click **Details** next to the patient's name.

You can use the **NAVXL** letters to track the patient's attendance to the class.

Class participant details

Use the following table to complete the class participant details:

Field	Description
Charge	Select which party is responsible for the class charge from the drop-down menu.
Contract	Update the contract from the drop-down menu, if necessary.
Booklet	If a patient has purchased a booklet, you can take the class out of the booklet by selecting it from the drop-down menu.
Treatment Cycle	You can link the class to a patient's existing treatment cycle or create a new treatment cycle, if required.
Comments	This comment appears next to the patient's name in the diary.
Authorisation Code	Enter the patient's insurance authorization code as provided by their insurer, if applicable.
Create confirmation letter	Select to create a patient letter confirming the booking.
Online payment	If Conductor has an integration to a payment provider, select this check box to take card or direct debit payments.

Track class participants

The buttons **N, A, X, V** and **L** are displayed next to the class to track each participant's actions.



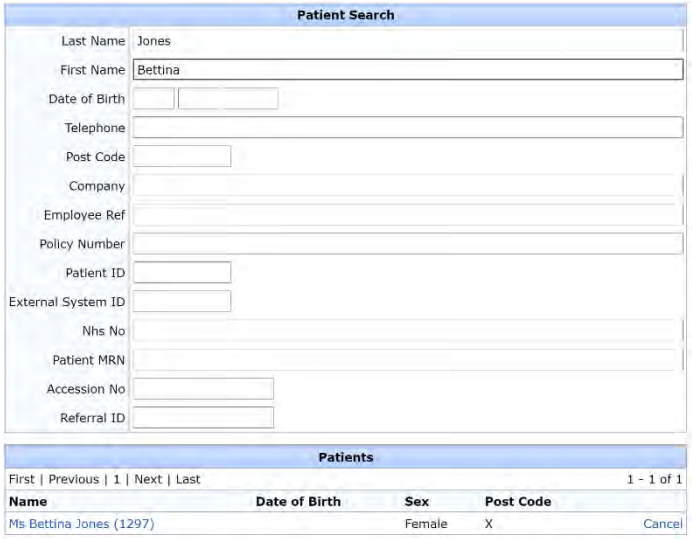
Book a patient into a class via the search engine

To book a patient into a class using the search engine:

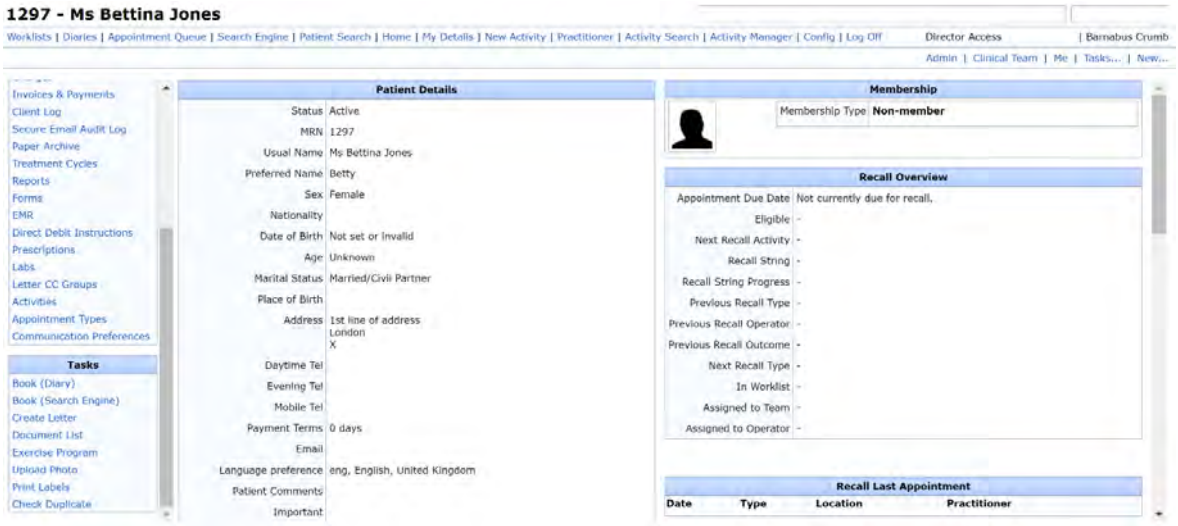
1. Select **Patient Search** or click the **Patient Search** icon in the menu bar to display the **Patient Management** page.

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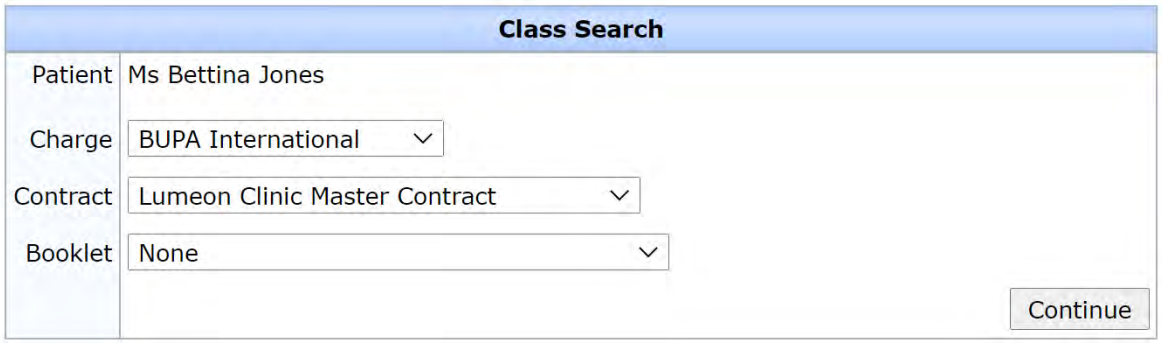
2. Search for the patient, then select the patient name from the generated results to display the patient's record.



3. Select the **Book (Search Engine)** on the **Tasks** menu of the **Patient Record** to display the **Appointment Search** page.

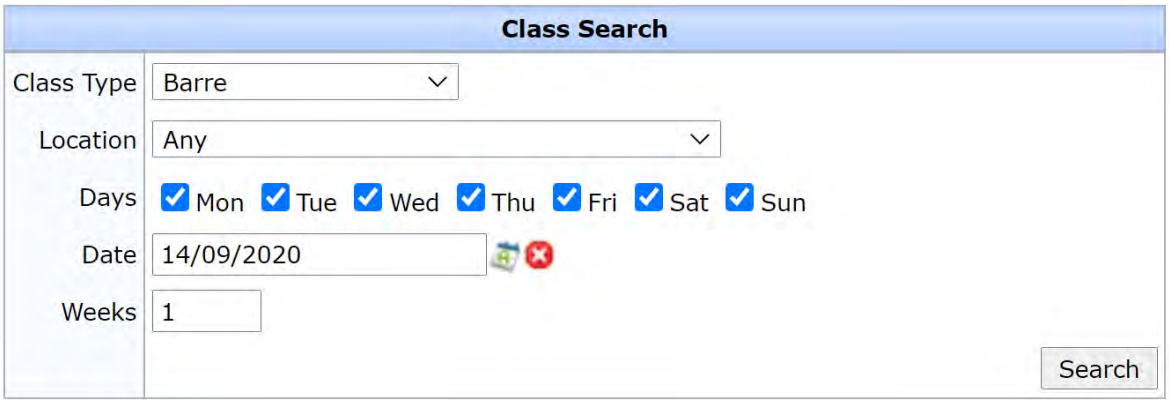


4. Using the **Class Search** form, ensure that the charge, contract and booklet information are correct, then click **Continue**.

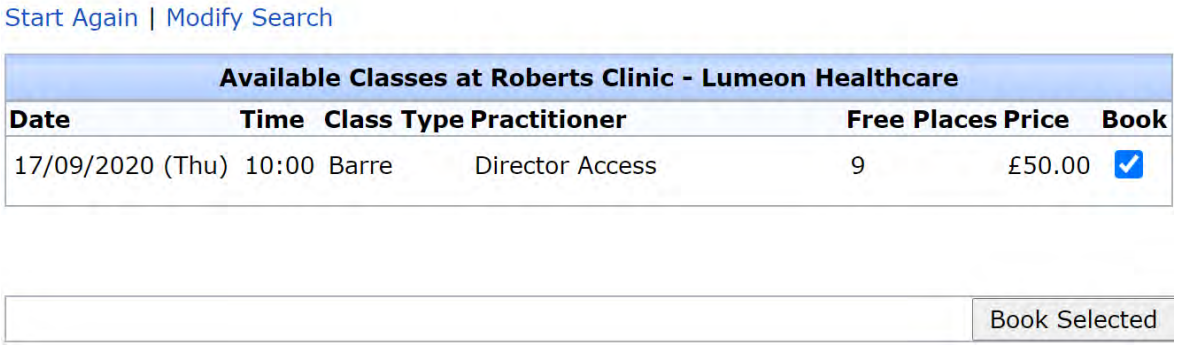


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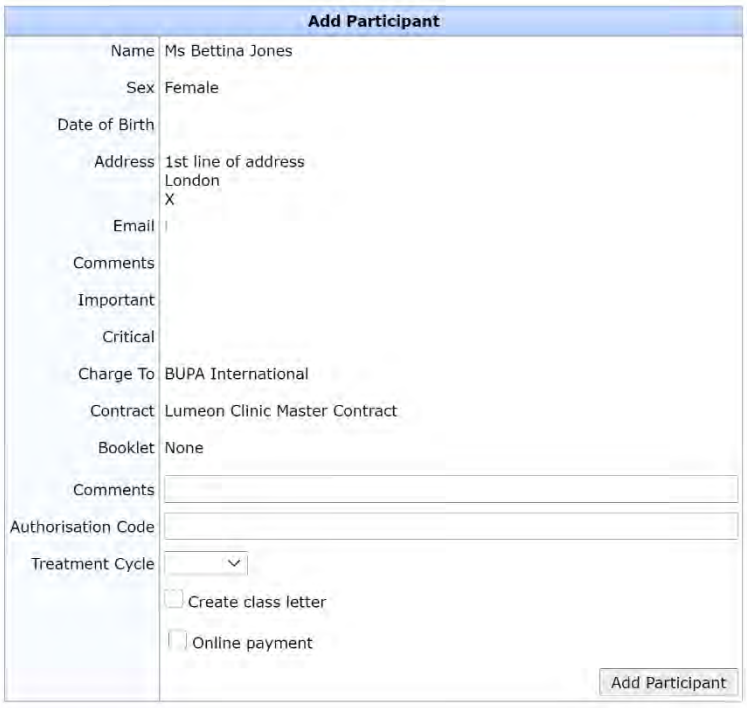
5. Select the **Class Type**, **Location**, **Days**, enter a date to begin the class search, and enter the number of weeks, then click **Search**.



6. Available classes are displayed. Select the classes which are to be booked and click **Book Selected**.



7. The class details are displayed. If all details are correct, click **Add Participant** to confirm the patient's class booking.



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Track class participants

On returning to the diary, the buttons **N, A, X, V** and **L** are displayed next to the class to track each participant's actions.



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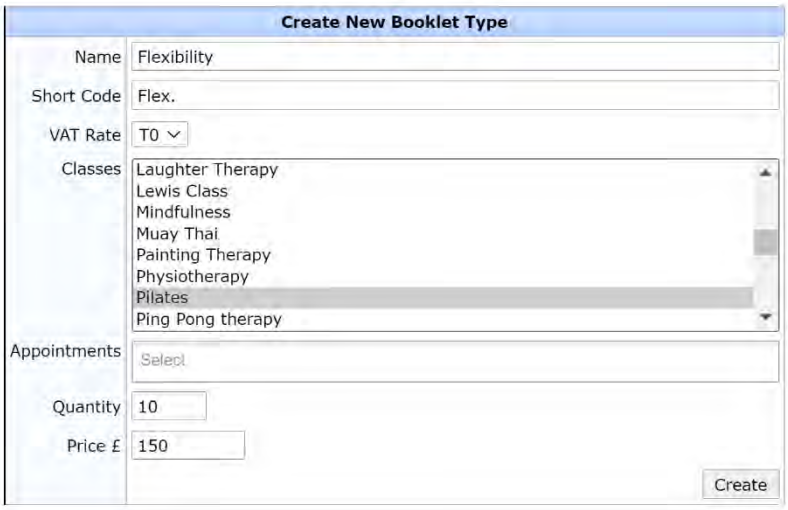
Booklets

Booklet functionality enables you to manage a fixed price, often discounted, set of appointments, or classes, or a combination of both. You can assign a booklet to a patient through a normal purchase of the item and Conductor performs a countdown to track how many of these appointments or classes remain available.

Create a booklet type

To create a booklet type:

1. Select **Booklets** in the **Products** menu. The **Booklet Types** page is displayed. On the left is a table of existing booklets, and on the right is the **Create New Booklet Type** form.



2. Enter a name for the package.
3. Select the classes or appointments to be included in the booklet. Use the **Ctrl** key to select more than one class or appointment.
4. Enter the number of inclusive episodes and a price for the package.
5. Click **Create**.

Once the booklet has been created, you need to make the product available for patients by adding the product to the relevant contract(s), assigning a price to it. See *Add a new product to existing contracts (page 6)*.

You cannot change the pricing of a booklet, so you must create a new booklet if the pricing needs to be changed.

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Add a booklet to a patient's account

To add a booklet to a patient's account:

1. Search for the required patient and select **Booklets** in the **Patient** menu.
2. Enter the required information. You can override the quantity and price that were entered when creating the booklet type, if required.
3. Click **Add**.

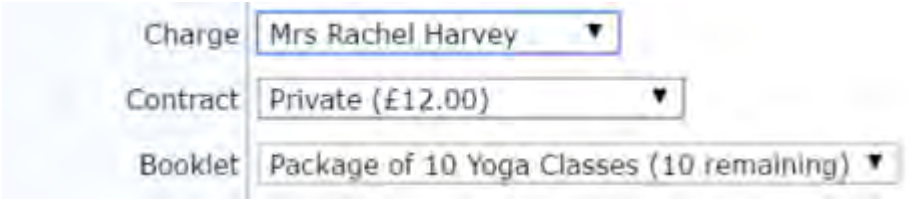
You can change the number of appointments or classes stored against a booklet.

The charge for the booklet appears on the patient's **Charges** page. You can raise invoices and take payments in the usual way.

Use booklets

Once a booklet has been added to a patient's account, when a particular appointment or class is booked, the patient can use the booklet. The correct price is displayed for the actual appointment but the use of the booklet means that the patient is not charged. Conductor also shows how many slots there are left in the booklet. You can edit the number of appointments or classes stored against a booklet. Patients can have multiple booklets added to their account.

To use a booklet as the form of payment for an appointment or class, select the diary slot and fill in the required fields in the **Appointment Details** page.



Select the booklet you want to use from the drop-down list and click **Create**. If the booklet has not been paid for, a message appears to check that the appointment should still be booked.

If no available booklets are displayed it may be for one of the following reasons:

- The patient's contract is not the same as the one defined when the booklet was added to the patient's account.
- The location is not the same as the one defined when the booklet was added to the patient's account.
- The booklet is not valid for that particular class or appointment, as defined when creating the booklet type.

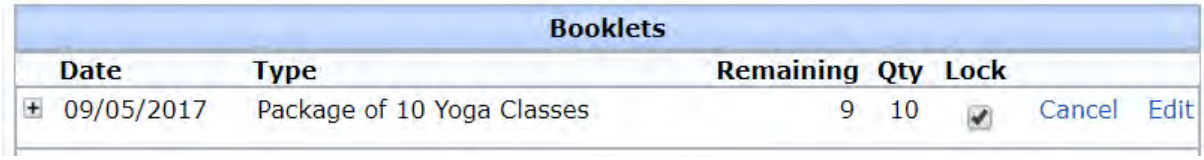
When all the appointments or classes from the booklet have been booked, the booklet will not show up as an option for payment.

In the diary view, once **L** has been clicked to show that the patient has left the appointment, the dot next to the patient's name will turn grey if the booklet has been paid for and red if it has not been paid for.

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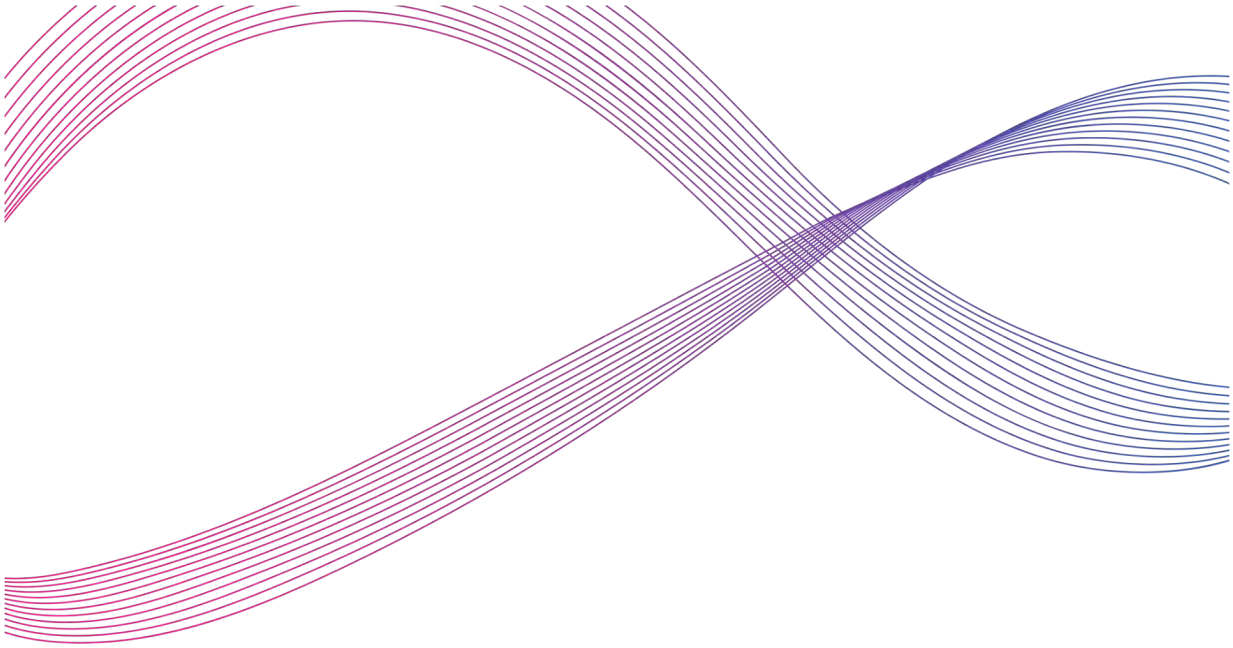
Lock a booklet

You can also lock a booklet to prevent any further appointments or classes being booked against it by selecting the **Lock** checkbox.



Booklets						
Date	Type	Remaining	Qty	Lock		
09/05/2017	Package of 10 Yoga Classes	9	10	☑	Cancel	Edit

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Clinical Reports in Lumeon Conductor 24.2

Issued by: Lumeon Learning
Date of issue: August 2024

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Introduction

Lumeon Conductor can generate clinical reports enabling you to produce varied clinical output in printed form, including scanned documents, clinical data, and text content.

You need a good knowledge of HTML to build clinical report templates.

Conductor generates clinical reports as HTML or PDF files depending on a core configuration setting. Contact Lumeon Support if you want to change this.

Purpose

The purpose of this document is to:

- Explain how to build clinical reports - see *Build a clinical report (page 4)*.
- Describe how to create a clinical report for a patient - see *Create a clinical report for a patient (page 12)*.

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Build a clinical report

Before you build a report template, you must create report section types. These are the building blocks of the report templates. A report template consists of one or more of these sections joined together. You can reuse a report section across multiple report templates. Each section is an HTML fragment, which optionally includes placeholders (the parameters) which are mapped to pull data from different areas of Conductor.

There are three steps to build a clinical report:

1. Create section types - see *Create report section types (page 4)*.
2. Build the report template - see *Build a report template (page 6)*.
3. Style the report - see *Report styling (page 11)*.

Create report section types

Before custom clinical reports can be built, you must create report section types. These are the building blocks of the report templates. A report template consists of one or more of report sections joined together. A report section can be reused across multiple report templates.

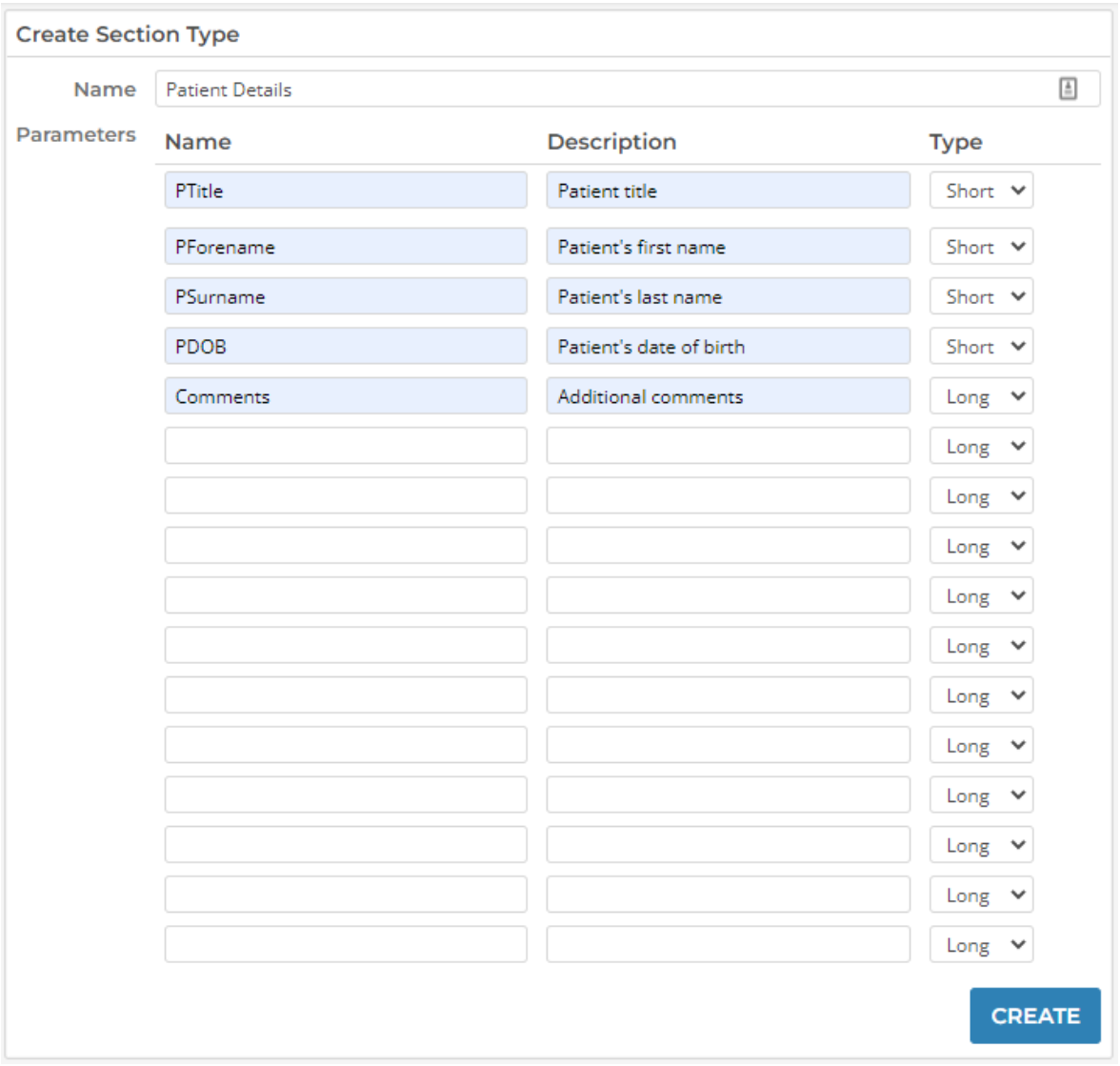
Each section is HTML content, which optionally includes parameters which are later mapped to extract data from the Conductor database.

To create a report section:

1. Select **Report Section Types** in the **Forms & EMR** menu. The Report Section Type Management page displays with a table of existing section types on the left and the **Create Section Type** form on the right.

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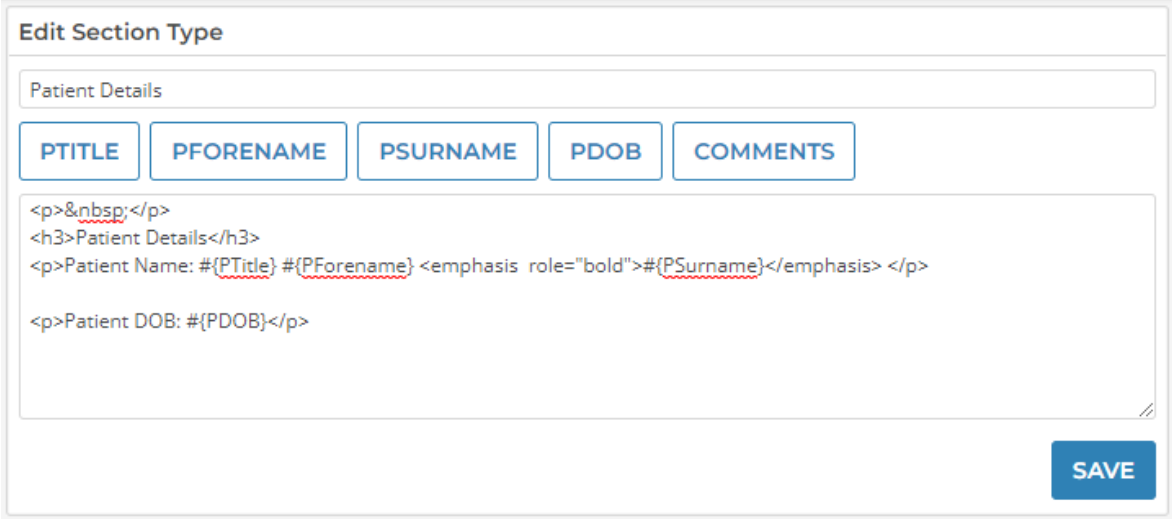
2. Enter a name for the section and then create each parameter that can be included in that section type. Add a description for each parameter, if required, and specify whether the parameter is a short or long data type. Click **Create**.



3. Select the section type you have just created in the table of existing section types. The **Edit Section Type** form appears.

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4. Enter the HTML content for the section type. Click on the tabs to enter the parameters within the HTML content. Click **Save**.



5. Find the section type in the table of existing section types. Its status is **Pending**. Click **Activate** next to the section type to make it live.

Once you have created a section type, you cannot change the list of parameters but you can change the HTML content. Each time you change the HTML for the section type, you must activate it again. This is because whenever you change an active section type, Conductor creates a new version of that section type. Clinical reports reference a specific version of a section type to ensure that modifying them does not affect existing reports. Activating a pending section type means that Conductor uses the latest version in new reports but existing reports use the previous version.

If you are creating only one or two clinical reports, you may want a single section for each report. If you have lots of similar clinical reports, you could build each report template from a number of smaller sections, which can be reused across each template. Using lots of smaller sections generally involves more initial setup but can make it easier to maintain reports in the future.

If you use a **digital signature** parameter, you must set the width of the signature. You can specify that the parameter in the section type is a signature when you build the report template. For example:

```
<p style="width: 5cm">#{signature}</p>
```

Build a report template

Once you have created report sections, you can use them to build a clinical report template.

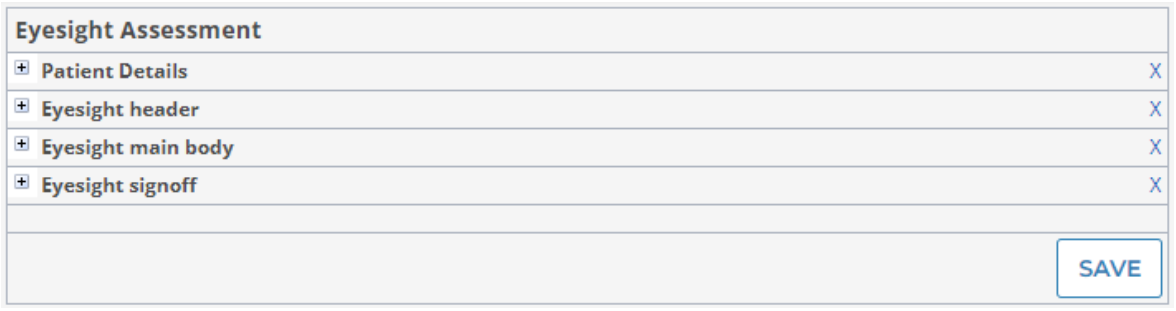
To create a new clinical report:

1. Select **Reports** in the **Forms & EMR** menu, and click **New...** at the bottom of the table of existing report templates. The **New Report** section appears on the right.

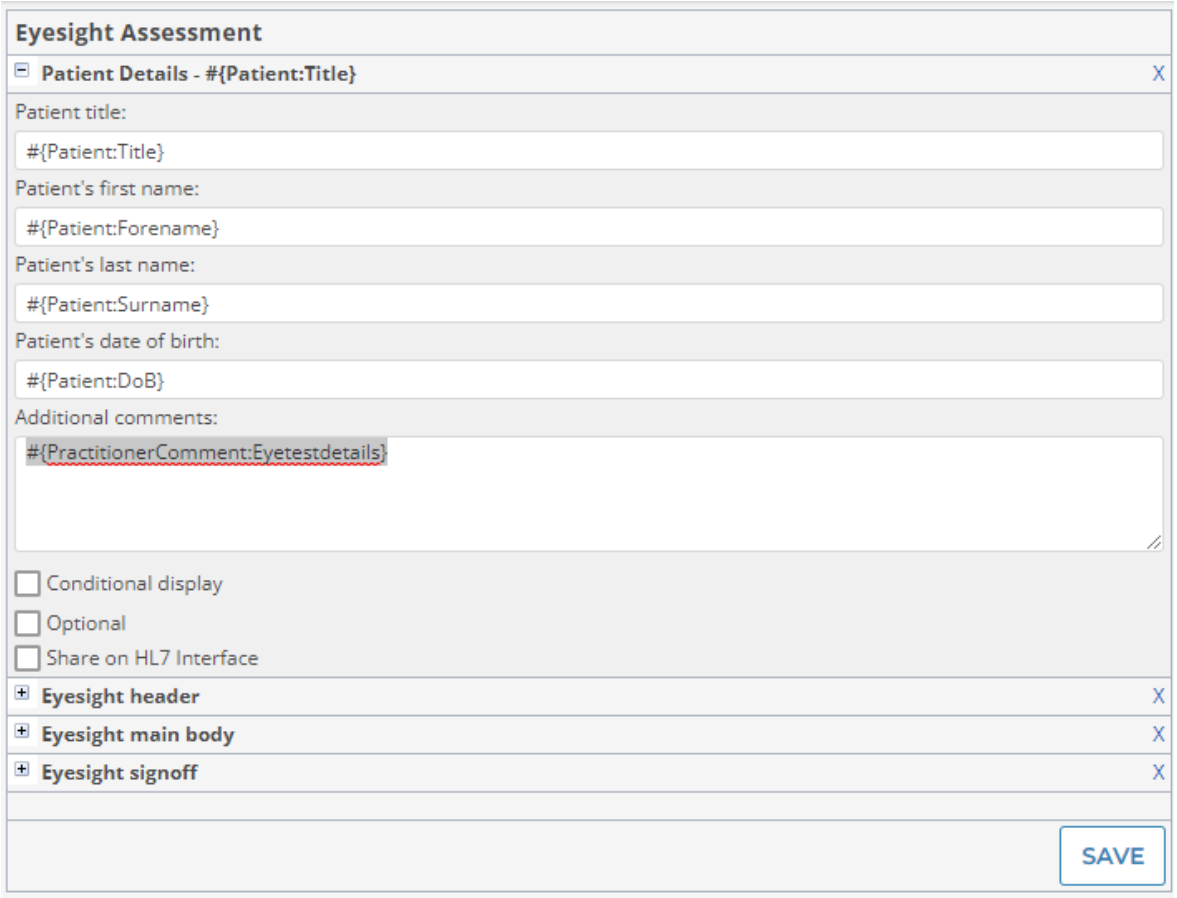
2. To name the report, highlight **New Report**, enter the report name, and press **Enter**.

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3. Build the template by dragging the required report sections from the list of report sections on the left into the space on the right under the report name. You can use sections many times within the same report.



4. Click **+** next to a section to expand it so that you can view and edit the values for its parameters . Fill in the boxes to specify what should appear there. This can be static text, a placeholder dragged from the **Values** list on the left (which is replaced with the appropriate value when a report is created), or a combination of the two. See the table below for a description of the different section types in the **Values** table.



5. Select **Conditional display** to specify a PHP expression that is executed to determine whether the section should be displayed in the generated report. Putting the field value and `!=` make the section hidden if there is no answer to the question.

6. Select **Optional** to give the user creating a report based on this template the option to include that section or not.

7. Select **Share on HL7** interface if your organization uses the HL7 and you want this section to be included in the HL7 interface.

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8. Click **Save**.

9. Click **Reports** in the **Forms & EMR** menu to redisplay the table of reports. Find the report in the table of existing reports and click **Activate** to make the report live.

To can change a previously created clinical report, select its name in the table. As with report section types, and for the same reasons, if you change an active report, Conductor creates a new version of that report. Activating the template marks the latest version for use in new reports created from then on.

If you want to create a report similar to an existing one, you can also copy a report and then make the appropriate changes.

Parameter values

The different parameter values in the **Values** table on the left are shown below:

Value	Description
Report	Information relating to the report itself, for example: • Created Date • Copy To

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Value	Description
Patient	Information about the patient to whom the report relates, for example: · Patient ID · Medical Record Number (MRN) · Title · Forename · Surname · Sex · Date of Birth · Date of Birth (ISO 8601 basic) · Age · Telephone (Day) · Telephone (Evening) · Telephone (Mobile) · Email Address · Address · Address (One Line) · Employee Reference · NHS Number · Insurance Company · Policy Number · GP Name · GP Job Title · GP Address · GP Code · GP Practice Name (from CPM3) · GP Practice Code · Company Name · Optometrist Practice Name (from CPM3) · Optometrist Practice Address · Optometrist Code · ID Domains Patient Medical Numbers · Optician (from CPM3)

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Value	Description
Appointment	Information about the appointment to which the report relates, for example: · Appointment ID · Type · Date · Start · Start (ISO 8601 basic) · End · Authorisation Code · Practitioner Title · Practitioner Forename · Practitioner Surname · Practitioner Job Title · Practitioner Telephone · Practitioner Address · Location · Location Address · Location Telephone · Location Logo · Referrer Title · Referrer Forename · Referrer Surname · Referrer Job Title · Referrer Telephone · Referrer Address · Report Recipient Address · External Practice Name · External Practice Address
Review	Information about the appointment review to which the report relates (if applicable), for example: · Review ID · Reviewer Title · Reviewer Forename · Reviewer Surname · Reviewer Job Title
Forms	Responses to questions, arranged by form.
Questions	Responses to questions, recorded against the appointment or referral to which the report relates. This includes responses recorded on forms and in the EMR.

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Value	Description
Derived Values	A derived value is a PHP expression that transforms existing values into a new value, for example, height and weight question could be used to create a derived BMI value.
Practitioner Comments	Displayed as text boxes for the user to fill in with free text at the point of creating a report.
Images	Displayed as image upload boxes for the user to attach images to at the point of creating the image.
Images Placeholder	Each of these is displayed as a box into which the user can drag and drop multiple images at the point of creating the report.
Specials	Client–specific.
External Report	A clinical report can be generated on receipt of a report (for example, a radiology report) from an external system. This contains the information relating to the received report.

Report styling

To apply CSS to report HTML, select **Report Styling** in the **Forms & EMR** page. This applies across all reports, regardless of the template.

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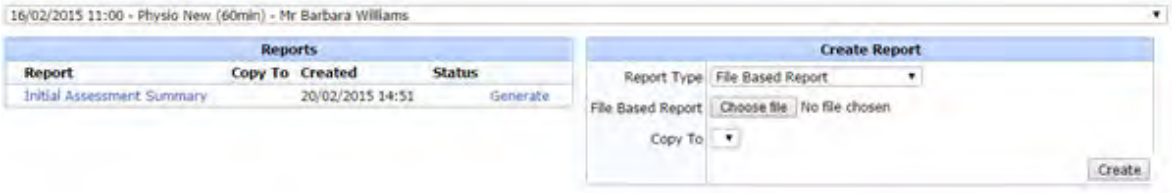
Create a clinical report for a patient

Both administrators and practitioners can create clinical reports. However, you can only generate a report if an appointment has been booked for the patient.

Create a clinical report as an administrator

To create a clinical report as an administrator:

1. Search for the patient that you want to generate a clinical report for.
2. Select **Reports** in the **Patient** menu. At the top of the screen, select the appointment for which a report needs to be generated.



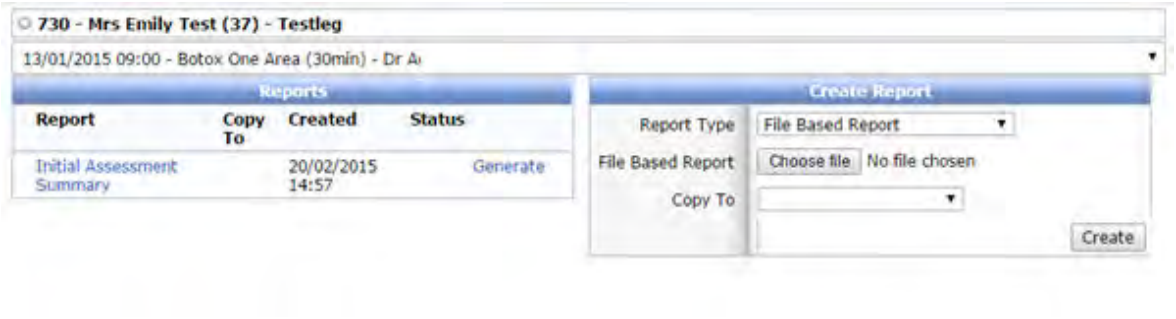
3. Select the report type from the drop-down menu and click **Create**.
4. The **Copy To** field can be used to select a 'copy to' recipient, for example, the patient's GP, in the clinical report. Use the **Report -> Copy To** value when building the report.
5. Select the name of the report to view it and to fill in any text fields. When all fields have been completed, click **Generate**.
6. Click **View** to download the report as an HTML or a PDF document. The format is determined by a core configuration setting. Contact Lumeon Support if you want to change this.
7. You can edit the report after this stage but you must generate it again and it shows as a revision.

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Create a clinical report as a practitioner

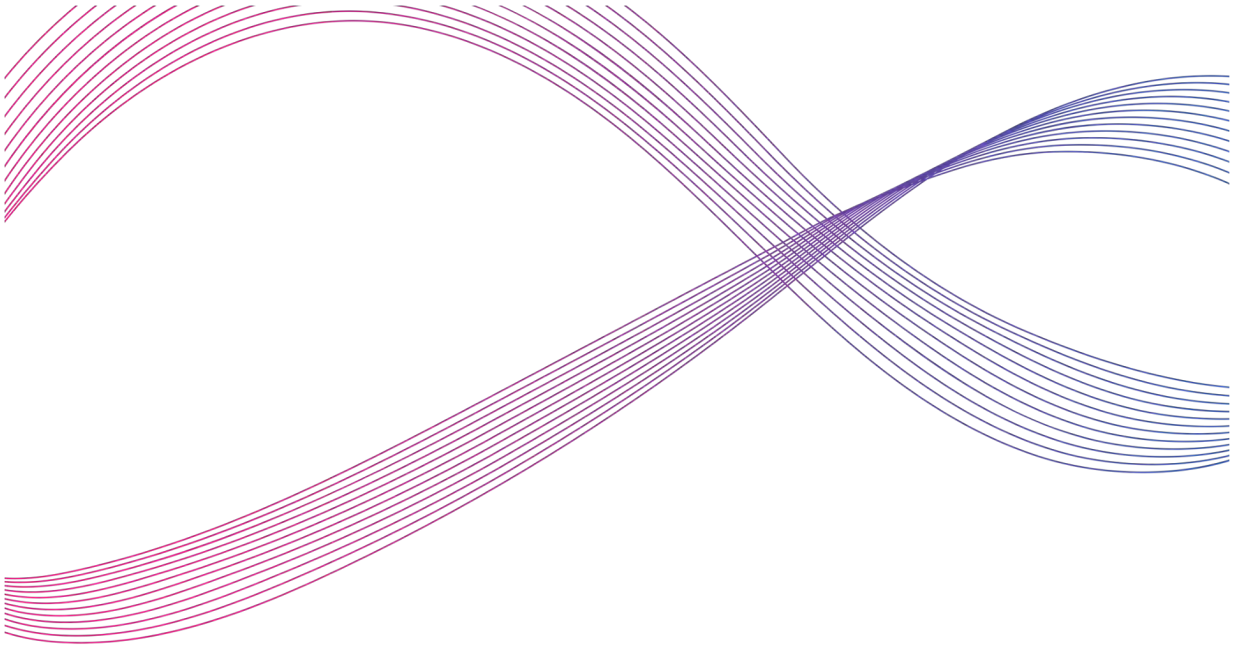
To create a clinical report as a practitioner:

1. Select **Reports** from either the patient or appointment menu. If navigating from the patient menu, select the appointment for which you want to generate a report.



2. Select the report type from the drop-down menu and click **Create**.
3. The **Copy To** field can be used to select a 'copy to' recipient, for example, the patient's GP, in the clinical report. Use the **Report -> Copy To** value when building the report.
4. Select the name of the report to view it and to fill in any text fields. When all fields have been completed, click **Generate**.
5. Click **View** to download the report as an HTML or a PDF document. The format is determined by a core configuration setting. Contact Lumeon Support if you want to change this.
6. You can edit the report after this stage but you must generate it again and it shows as a revision.

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Communication Schemes in Lumeon Conductor 24.2

Issued by: Lumeon Learning
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Introduction

Patients may be contacted by their health provider using a variety of communication methods. Communication schemes enable providers to configure Lumeon Conductor so that these complex communication scenarios can be easily modeled, managed, and executed.

A further complexity is the requirement to send different types of communications depending on the specific care pathway, appointment type, condition, or test requirements, and a need to “brand” communications contextually dependent on the patient's relationship with the provider and the insurance company.

Communication schemes are automatically triggered at the relevant time within a care pathway and require little or no action from clinical or administration staff, removing the need for additional notification steps to be carried out manually. This results in a faster, more consistent patient journey and a better informed patient, reducing non-attendance and enquiry calls.

Conductor also enables clinical and administration staff to send a letter, email. or SMS message to an individual patient as required. For example, if you want to invite a patient to call you to book an appointment for a specific procedure. Sending this type of communication is a manual process outside pathways, and is not covered by this document. See ***Letter & Email Templates in Lumeon Conductor*** for more information on creating and sending letters and emails.

Communication scheme functionality

You can build template themes for individual companies to reflect their branding and standard documentation. This means that a private patient can receive a different style email or letter for an appointment than one funded by a company or insurer.

The communication templates include merge tags which automatically provide details specific to the patient and appointment. You can include additional details, such as the need to get a pre-approval number for an appointment, for a particular provider, and you can customize the attachments.

Communication schemes in Conductor enable your organization to send the most appropriate communication to a recipient when a system event occurs. A communication consists of the template used to generate the message as well as the method by which the message is sent.

You can also configure and prioritize each patient's preferred methods of contact. You can choose amongst email, SMS, letter, and phone call.

If the method of communication is a phone call, Conductor creates a task to notify users that they need to call the patient. Conductor can also notify members of a task queue if all of a patient’s methods of communications have failed.

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Purpose

The purpose of this document is to:

1. Enable you to perform the preliminary setup tasks required before you can start to use communication schemes - see *Preliminary setup (page 5)*.
2. Explain how to set up communication schemes and link them - see *Communication scheme setup (page 7)*.
3. Explain patient communication using communication schemes - see *Patient communication (page 15)*.
4. Provide an understanding of the configuration required to enable communication scheme functionality - see *Communication scheme configuration (page 16)*.

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Preliminary setup

Before you set up the communication schemes, you must ensure that the following have been set up:

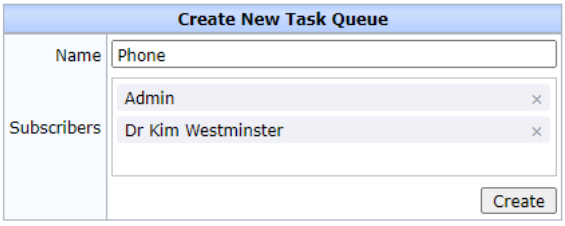
- Core configuration and security points have been set up by Lumeon to enable access to communication scheme functionality. See *Communication scheme configuration (page 16)* for more information.
- Task queues and their subscribers - see *Add task queues for use in communication schemes (page 5)*.
- Contact your Lumeon account manager if you need any of the following functionality enabled and they are not configured for your organization:
  - ***DocMail*** - a facility for printing and posting letters
  - Emails
  - Standard or interactive SMS messages
  - Interactive Voice Response messages (IVR)
- Configuration for appointment reminders - contact your Lumeon account manager if this is not already set up for your organization.
- Email, SMS, IVR, and/or letter templates - see *Edit templates for use in communication schemes (page 6)*. See also:
  - ***Letters & Email Templates in Lumeon Conductor***
  - ***SMS & IVR Messages in Lumeon Conductor***

Add task queues for use in communication schemes

You must add task queues, for example, to notify the appropriate people to contact a patient by phone or for failed notifications. Contact Lumeon Support if you would like us to add task queues for you.

To add task queues:

1. Select **Task Queues** in the **System Configuration** menu.



2. Enter the task queue name and the subscribers to the task queue. You can add individual users or groups of users as subscribers.

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3. Click **Create**.

System task queues do not display in the drop-down list for communication schemes because they are reserved for system use.

Edit templates for use in communication schemes

You must create or edit templates for the following methods of communication, as required. Contact Lumeon Support if you want us to create them for you.

1. **Emails**
   - Used for e-mails in communication schemes.
   - If using an authenticated SMTP server, the **From** address must be the login used in the SMTP server otherwise the email may be rejected by the server.
   - Different company templates display in communication schemes as **email template group name (company name)**
   - See ***Letter & Email Templates in Lumeon Conductor*** for information on setting up email templates.
2. **Letters**
   - Used for letters in communication schemes.
   - The **Content** field has no effect as part of communication schemes.
   - Only patient related merge tags can be used.
   - All letters can be bulk printed. If ***DocMail*** is enabled, letters are sent via DocMail.
   - See ***Letter & Email Templates in Lumeon Conductor*** for information on setting up letter templates.
3. **SMS**
   - Used for standard SMS and interactive SMS (ISMS) messages in communication schemes.
   - See ***SMS & IVR Messages in Lumeon Conductor*** for information on setting up SMS templates.
4. **IVR**
   - Used for interactive voice response (IVR) messages in communication schemes.
   - See ***SMS & IVR Messages in Lumeon Conductor*** for information on setting up IVR templates.

See *Appendix 1 - Merge tags (page 17)* for information on the merge tags you can use in templates for communication schemes.

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Communication scheme setup

Communication methods

For each method of communication that you use, you must indicate which template or task queue you want to use:

Communication method	Description
Email	You can configure email templates using **Email Templates** in the **Communication** menu or the **Pathway Logic** menu. You must write templates in Twig. You can attach calendar files to appointment emails. See ***Letter & Email Templates in Lumeon Conductor*** or ***HTML Template Management in Lumeon Conductor*** for information on how to create and use email templates.
Standard SMS	You can configure standard (non-interactive) SMS templates using **SMS & IVR Templates** in the **Communication** menu or the **Pathway Logic** menu. You can include Twig logic in standard SMS templates. There is a limit of 160 characters per message. See ***SMS & IVR Messages in Lumeon Conductor*** for information on how to create and use standard SMS templates.
Interactive SMS (ISMS)	You can configure interactive SMS templates using **SMS & IVR Templates** in the **Communication** menu or the **Pathway Logic** menu. You can include Twig logic in ISMS templates. There is a limit of 160 characters per message. See ***SMS & IVR Messages in Lumeon Conductor*** for information on how to create and use ISMS templates.
Interactive Voice Response (IVR) messages	You can configure IVR templates using **SMS & IVR Templates** in the **Communication** menu or the **Pathway Logic** menu. You can include Twig logic in SMS templates. See ***SMS & IVR Messages in Lumeon Conductor*** for information on how to create and use IVR templates.
Letter	You can configure letter templates using **Letters** in the **Communication** menu. You can write templates using Twig or using merge tag functionality. The **Content** field on the **Letters** page has no effect as part of communication schemes. All letters can be bulk printed. If DocMail is enabled, letters are sent via DocMail. Letter attachments do not work when communication scheme functionality is enabled. See ***Letter & Email Templates in Lumeon Conductor*** for information on how to create and use letter templates.
Phone	Select which task queue should be notified when a patient must be contacted by telephone. Task queues can be set up, and users added to them, using **Task Queues** in the **System Configuration** menu.

Assign templates or tasks to communication schemes

To view communication schemes, select **Schemes** in the **Communication** menu. There is a default scheme and self-payor scheme visible. Conductor uses the self-payor scheme when the patient is the payor of the appointment. The default scheme is a blank template which you must use to indicate the task queue that is notified should all communication methods for a patient fail.

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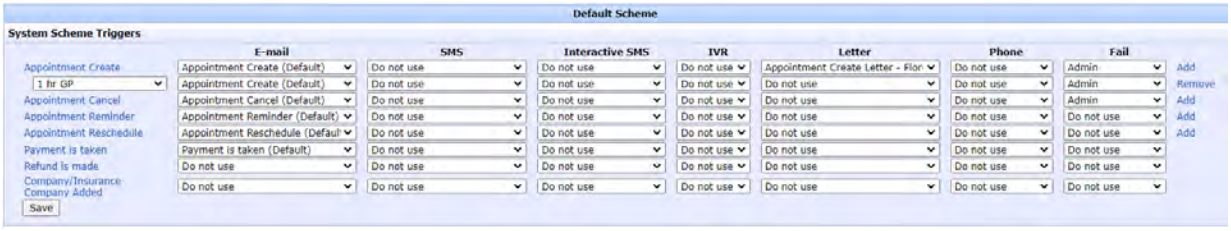
You can use multiple templates for an event based on the appointment type. This enables specific instructions for treatments or tests to be automatically included in standard letters or emails, for example, fasting requirements before a blood test. If you need a different template for a different appointment type, click **Add**. A drop-down menu appears under the parent communication scheme. Select the specific appointment type and enter the appropriate templates in the corresponding communication methods.



If the method should not be used when communicating with the patient for that particular action, you can set the communication template drop-down to **Do not use**.



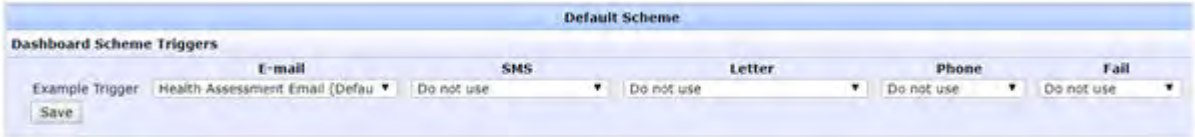
Only the default scheme has a **Fail** column. Conductor uses this to indicate which task queue to notify when a scheme is set for the payor but no appropriate communication method is found. For example, if **Do not use** is selected for all email, SMS, IVR, letter, and phone options.



To create a new communication scheme, click **+ Add a new scheme**.



Custom communication scheme triggers are also listed here. You can trigger these by clicking on an action. See *Customized communication schemes (page 9)* to set these up.



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See *Generate patient communication (page 15)* for a list of events that you can create communication schemes for.

Manage communication schemes

A suite of letter, email, SMS templates and phone scripts associated with appointment and billing events. These are automatically created and the preferred contact method used to send them. Templates have merge fields to automatically include details specific to that patient, appointment and care pathway.

Customized communication schemes

You can create customized communication scheme triggers that are linked to pathways. Specific actions within the pathways trigger the communications.

Create custom communication scheme triggers

To configure the names of the custom communication scheme triggers:

1. Select **Custom Communication Scheme Triggers** in the **Communication** menu.



2. Enter the name of the trigger and click **Create**. The trigger then displays in the list on the **Communication Schemes** page.

Link triggers to pathway actions

You can then link these triggers to pathway actions.

Link trigger to a new action

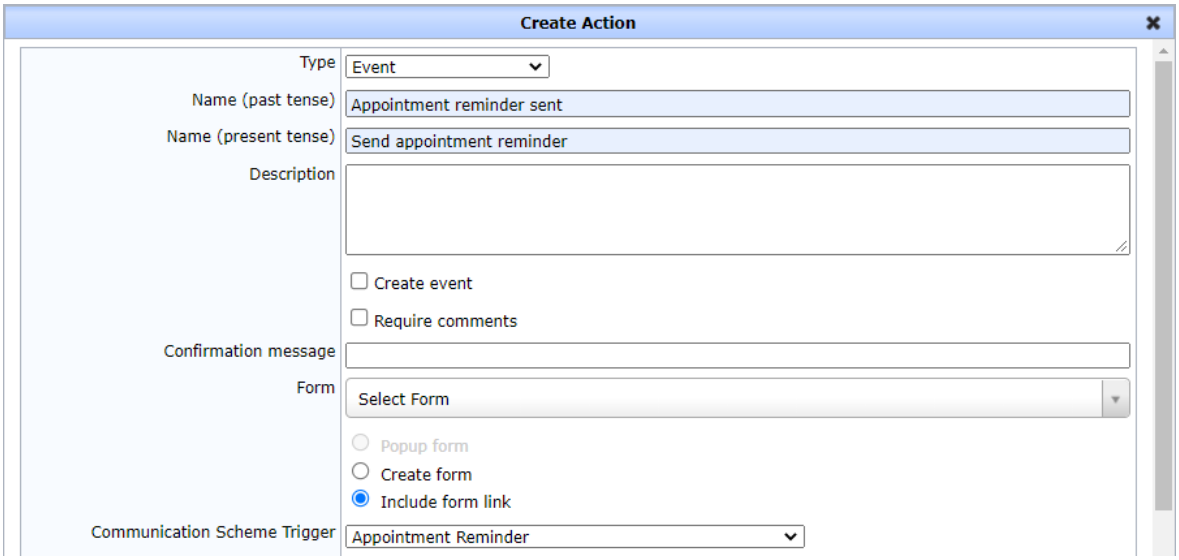
To create a new action and link to a trigger:

1. Select **Actions** in the **Pathway Logic** menu.
2. In the top right hand corner, ensure the field next to **New** is set to **Other**, and click **Create**.



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3. In the **Create Action** window, ensure that the **Type** is **Event**.



4. Enter the name of the action in the past and present tense.

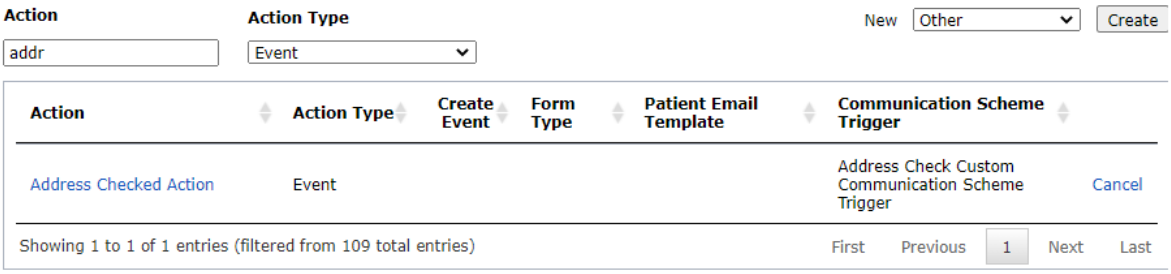
5. Select the appropriate **Communication Scheme Trigger** from the drop-down list.

Link trigger to an existing action

To link a trigger to an existing action:

1. Select **Actions** in the **Pathway Logic** menu.

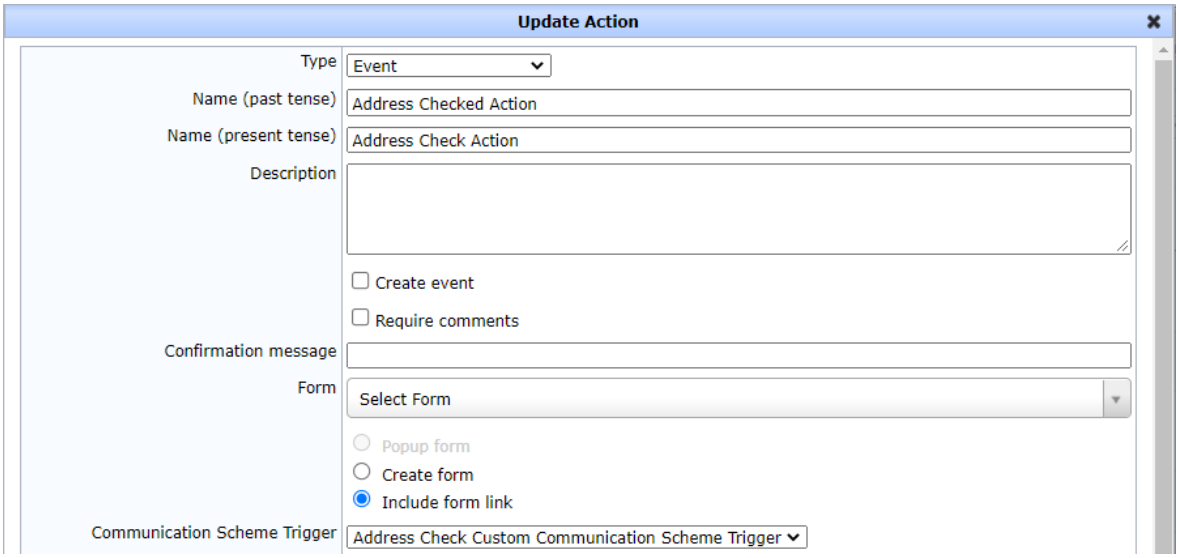
2. Find the appropriate action in the list of existing actions. You can search for the action by typing its name in the **Action** field. A list of matching actions is displayed and you can select the correct one.



You can also filter the actions by selecting **Event** in the **Action Type** field to display the actions to choose from.

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3. Select the name of the action. The **Update Action** window displays.



4. Select the appropriate **Communication Scheme Trigger** from the drop-down list.
5. Click **Update**.

Link communication schemes

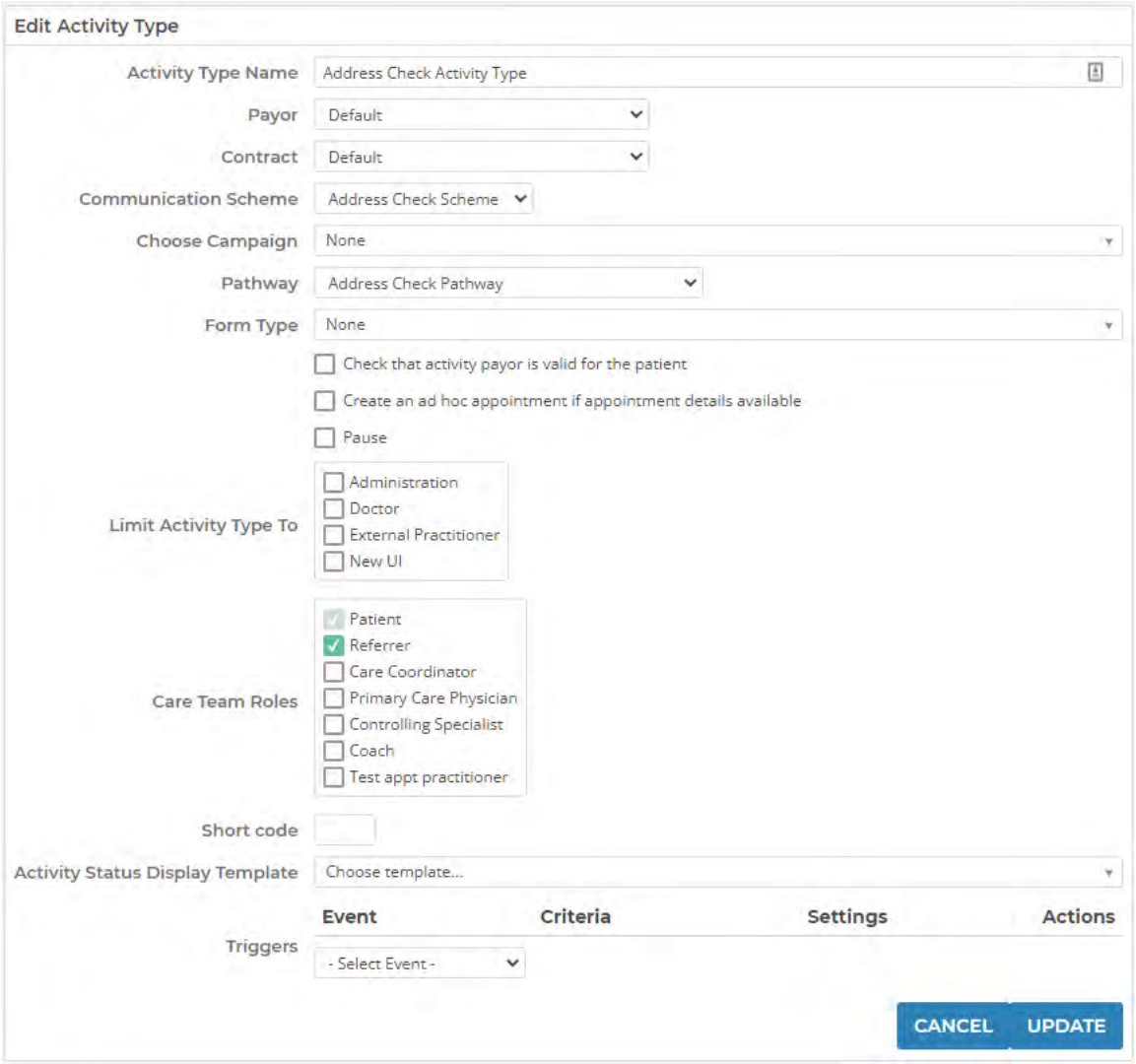
Link a communication scheme to an activity type

To link a communication scheme to an activity type:

1. Select **Activity Types** in the **Pathway Logic** menu.
2. Select the activity type that you want to link to a communication scheme from the **Activity Types** list.

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3. Select the communication scheme from the drop-down list in the **Communication Scheme** field.

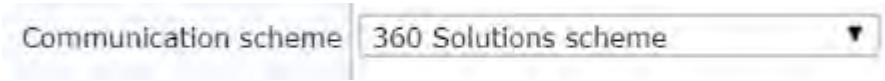


4. Click **Update**.

Link a company to a communication scheme

You must link a company to a communication scheme to determine the correspondence templates that employees of that company will receive.

To link a company to a communication scheme, navigate to the company's account and select **Company Details**. Select the correct communication scheme from the drop-down list. If you do not select a communication scheme, it is assigned to the default scheme.

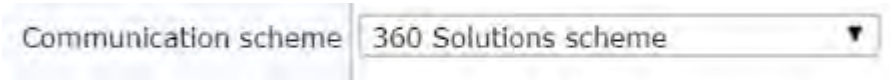


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Link an insurance company to a communication scheme

You must link insurance companies to a communication scheme to determine the correspondence templates that members of that insurance company will receive.

To link an insurance company to a communication scheme, navigate to the insurance company's account. Select the correct communication scheme from the drop-down list. If you do not select a communication scheme, it is assigned to the default scheme.



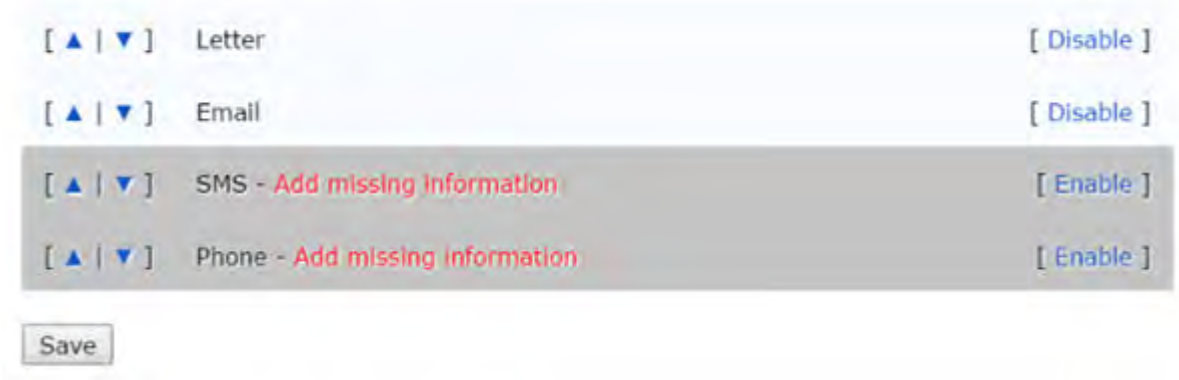
If you do not select a communication scheme, correspondence may not display correctly when the patient receives it.

Set a patient's communication preferences

To set a patient's communication preferences, navigate to their account and select **Communication Preferences** from the menu on left. Here, you can choose which communication methods are available for the patient by enabling or disabling each type. You can also prioritize the patient's preferences by using the arrows to re-order the list. The patient's most preferred method is at the top of the list. By default, communication preferences are set to:

1. Email
2. Letter
3. SMS including interactive SMS and IVR
4. Phone (supported via tasks)

If **Add missing information** is displayed, you must add more information to the patient's account for that communication method to be used, for example, a phone number may be missing.



Phone calls are aligned with pre-defined scripts that are visible to the caller, the call itself is a task allocated to the person or group responsible.

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Whenever a communication is triggered, Conductor checks if there is a template for the patient's preferred communication method. If there is, it uses this communication method. If Conductor cannot find a template, it checks to see if there is a template for the next communication method and so on.

If none of the patient's available communication methods have a template set, Conductor creates a **Fail** message and assigns a task to the task queue specified on the default scheme.

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Patient communication

Generate patient communication

Conductor generates a communication when one of the following events occurs:

- An appointment is created
- An appointment is cancelled
- An appointment reminder is sent
- An appointment is rescheduled
- A company/insurance company is added
- A payment is taken
- A payment is refunded
- An appointment reminder is resent

When Conductor has generated a communication for a patient, a notification appears at the top of the page. For example:



Communication scheme behaviour

When a pathway triggers an event and the communication scheme functionality is enabled, the following process occurs:

1. Conductor checks whether or not the payor has a communication scheme. The payor may be the patient, company, or insurance company. If the payor does not have a communication scheme, Conductor uses any previous communication sending code.

2. If the payor does have a communication scheme, Conductor checks whether or not an appropriate template or task queue exist.

3. Conductor uses the top patient preference with a matching template or task queue for the scheme. Only one communication is sent even if templates exist for multiple methods.

4. If no matching templates or task queues are available, Conductor uses the **Fail** task queues set in the default scheme. If the **Fail** task queue is set to **Do not use**, Conductor sends no notification for that particular event.

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Communication scheme configuration

To enable communication scheme functionality in Conductor, the following configuration tasks must be undertaken:

- **Core configuration** - This is performed by Lumeon Support. See *Core configuration (page 16)*.
- **Security points** - Initial configuration is usually performed by Lumeon Support but system administrators can update these settings. See *Security points (page 16)*.

Core configuration

Lumeon has access to core configuration settings which can enable or disable Conductor functionality. Contact Lumeon Support if you want to change your organization's access to this functionality.

The following core configuration settings control access to communication scheme functionality:

Name	Description
`CommunicationScheme`	Enables communication schemes functionality and displays the **Schemes** option in the **Communication** menu.
`comms_scheme_integrations`	Maps the internal communication methods for IVR and ISMS to the implemented API gateway communications service. For example: `$CORE_CONFIG['comms_scheme_integrations'] = [ 'ivr' => ['service_id' => 'Nexmo IVR'], 'isms' => ['service_id' => 'Nexmo SMS'] ];`
`EnableCommunicationPreferencesUI`	Enables the **Communication Preferences** option for patients, contracts, practitioners, external practitioners, company contacts, and staff.
`enable_interactive_comms`	Changes the **SMS Templates** option in the **Pathway Logic** and **Communication** menus to **SMS and IVR Templates**. Enables configuration of IVR and ISMS templates in addition to standard SMS templates.
`multi_language_enabled`	Enables multiple language translations in ISMS and IVR templates.

Security points

System administrators and Lumeon Support have access to security point settings which can enable or disable visibility of Conductor functionality for other users.

The following security points control access to communication schemes functionality:

Security point	Description
`Communication.Scheme`	**Can View** - Controls access to the **Schemes** option in the **Communication** menu, and the **Communication Schemes** page.
`Communication.CustomCommunicationSchemeTrigger`	**Can View** - Enables the user to view, add, edit, and delete custom communication scheme triggers.

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Appendix 1 - Merge tags

The simplest form of Twig tags simply output a value into a communication method. These variables are enclosed by braces `{{...}}`.

More powerful Twig tags include loops `{% for x in somelist %} ... {% endfor %}` and conditionals `{% if x or y %} ... {% endif %}`. Loops are not supported in letters.

Each section below describes a type of variable, and the attributes available, by which you can access other types of variable. Sample Twig is provided for many of them. Attributes of variables, and their attributes, are accessed by separating the names with a dot (or by using square brackets).

The following merge tags are available for each event. Twig tags are event type specific.

Event name	Available Twig tags
Appointment cancelled	· Patient · Appointment · Payor
Appointment created	· Patient · Appointment · Payor
Appointment reminder	· Patient · Appointment · Payor
Appointment rescheduled	· Patient · Appointment · Payor
Patient payor added	· Patient · Company · InsuranceCompany · Payor
Payment refunded	· Patient · Payment · Payor
Payment taken	· Patient · Payment · Payor
Resend appointment confirmation	· Patient · Appointment · Payor

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Patient merge tags

Name	Type	Description	Example
nhsNumber	Text	NHS-issued ID for the patient.	{{patient.nhsNumber}}
individual	Individual	Access to basic information about the patient is via this attribute.	{{patient.individual.name}}
medicalRecordNumbers	List of ID Domain Patient Medical Record Number (by ID Domain ID)	Medical record numbers, per ID Domain, including those generated by Conductor. The first example shows all the MRNs in a bulleted list; the second shows the MRN relevant for the recipient's ID Domain.	{% if patient.medicalRecordNumbers %} Medical record numbers: {% for mrn in patient.medicalRecordNumbers %} * {{mrn}} {% endfor %} {% endif %} Recipient reference: {{patient.medicalRecordNumbers[id_domain.id]|default('(Missing)')}}
gp	External Practitioner	Patient's GP, that is the external practitioner details associated directly to the patient as a GP.	{{patient.GP.name}} {% for addressLine in patient.GP.individual.address.addressLines %} {{addressLine}} {% endfor %}
nextOfKin	Text	Patient's next of kin	{{patient.nextOfKin}}
medicalRecordNumber	Text	Patient's medical record number	{{patient.medicalRecordNumber}}

Individual merge tags

Name	Type	Description	Example
name	Name	The individual's name. You can either use this directly, or request the name in a particular format, via its attributes.	(See Name below.)
dob	CDate	Date of birth. Dates are stored in Conductor in a special format, so you need to use a date formatting filter to get the output in a human-friendly format.	{{ patient.individual.dob|date('d F Y') }}

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Name	Type	Description	Example
addressLines	List of text	Individual's address. Can be formatted to display in a single line separated by commas or can be displayed in new lines using 	{{ addressLine }} {% endfor %} {% for addressLine in patient.gp.individual.address.addressLines %} {{ addressLine }} {% endfor %}
sex	Text	Gender. By default, patient gender will be displayed 'M/F/U/O'.	{{ patient.individual.sex}} {% if patient.individual.sex == 'M' %} Male {% endif %}
telephoneMobile	Text	Mobile number	{{ patient.individual.telephoneMobile}}
telephoneDay	Text	Day time telephone number	{{ patient.individual.telephoneDay}}
telephoneEvening	Text	Evening telephone number	{{ patient.individual.telephoneEvening}}
email	Text	Email address	{{ patient.individual.email}}
externalSystemID	Text	External system ID	{{ patient.individual.externalSystemID }}

Appointment merge tags

Name	Type	Description	Example
shortDescription	Text	Generates a short description string, that is, `<Practitioner> <Location> - <Date>`.	{{appointment.shortDescription}}
isAbandoned	Boolean		Thanks for coming. {% if appointment.isAbandoned %} We're sorry you had to leave early. {% endif %}
studies	*list of* Study	Useful for a system configured with clinical procedures.	You are scheduled for the following procedures: {% for study in referral.nextAppointment.studies %} * {{study.procedureDescription}} {% endfor %}
location	Location	Appointment location	{{referral.mostRecentAppointment.location.name}}
startTime	CDateTime	Start time for the appointment.	{{date(appointment.startTime) | date('d/m/Y')}}
appointmentTypeName	Text	Name of the appointment type for the appointment.	{{appointment.appointmentTypeName}}
appointmentTypeNameShort	Text	Short name of the appointment type for the appointment.	{{appointment.appointmentTypeNameShort}}

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Payor merge tags

These tags also have all the properties of individual merge tags.

Name	Type	Description	Example
name	text	Name of the individual paying	{{payor.name}}

Company merge tags

Name	Type	Description	Example
companyName	Text	Name of the company	{{company.companyName}}
patientInstructions	Text	Patient instructions stored against the company	{{company.patientInstructions}}
logo	Image	Inserts company logo into emails or letters only	{{company.logo}}

Insurance company merge tags

Name	Type	Description	Example
patientInstructions	Text	Patient instructions stored against the company	{{insurancecompany.patientInstructions}}
logo	Image	Inserts company logo into emails or letters only	{{company.logo}}

Payment merge tags

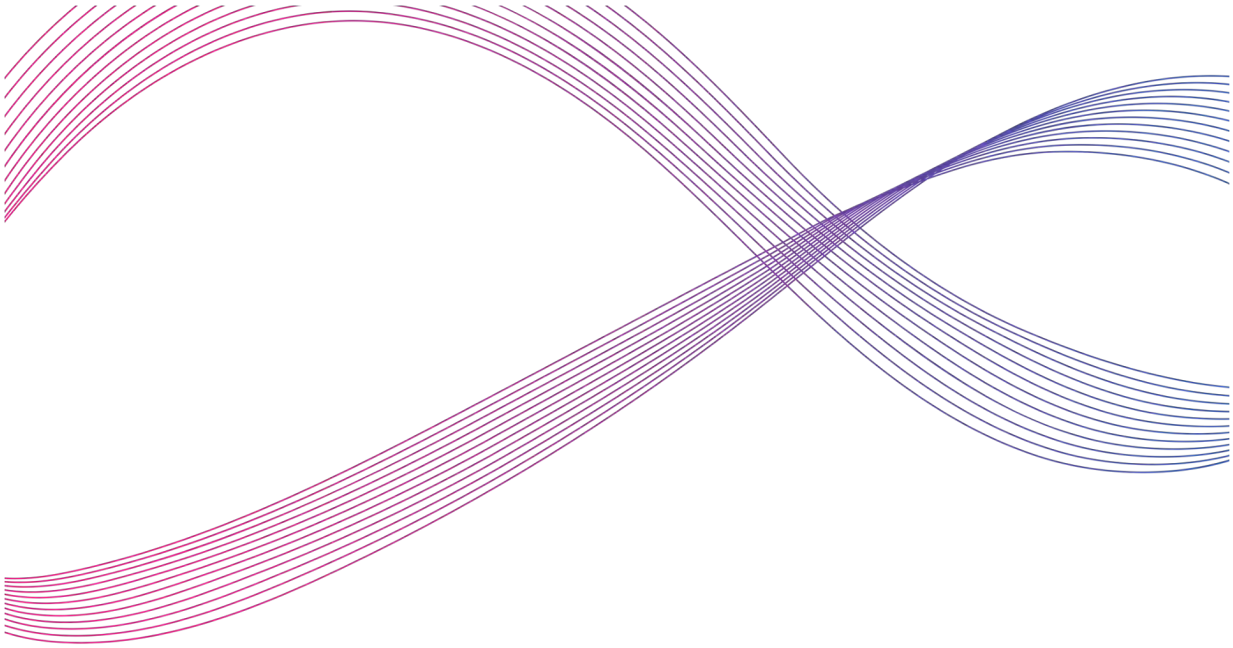
Name	Type	Description	Example
patient	Patient	Information about the patient linked to this payment	{{payment.patient.individual.name}}
amount	string	Payment amount	{{ payment.amount }} payment amount can be displayed with a minus sign {{ payment.amount|abs }} to display a payment amount without a minus sign
paymentDate	int	Payment date	{{ payment.paymentDate }} or {{ payment.paymentDate|date('d F Y') }}

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Glossary

DocMail	A facility for printing and posting letters. Conductor can be integrated to DocMail for sending letters to patients. See *https://www.docmail.co.uk/* for more information.

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Drug Products in Lumeon Conductor 24.2

Issued by: Lumeon Learning
Date of issue: August 2024

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Introduction

Conductor can be integrated with the ***SafeScript*** drug database. The database allows optimization of prescribing, including intelligent flagging of contraindications and interactions.

If drug products are added as stock, they can then be prescribed and dispensed locally with stock levels adjusting accordingly.

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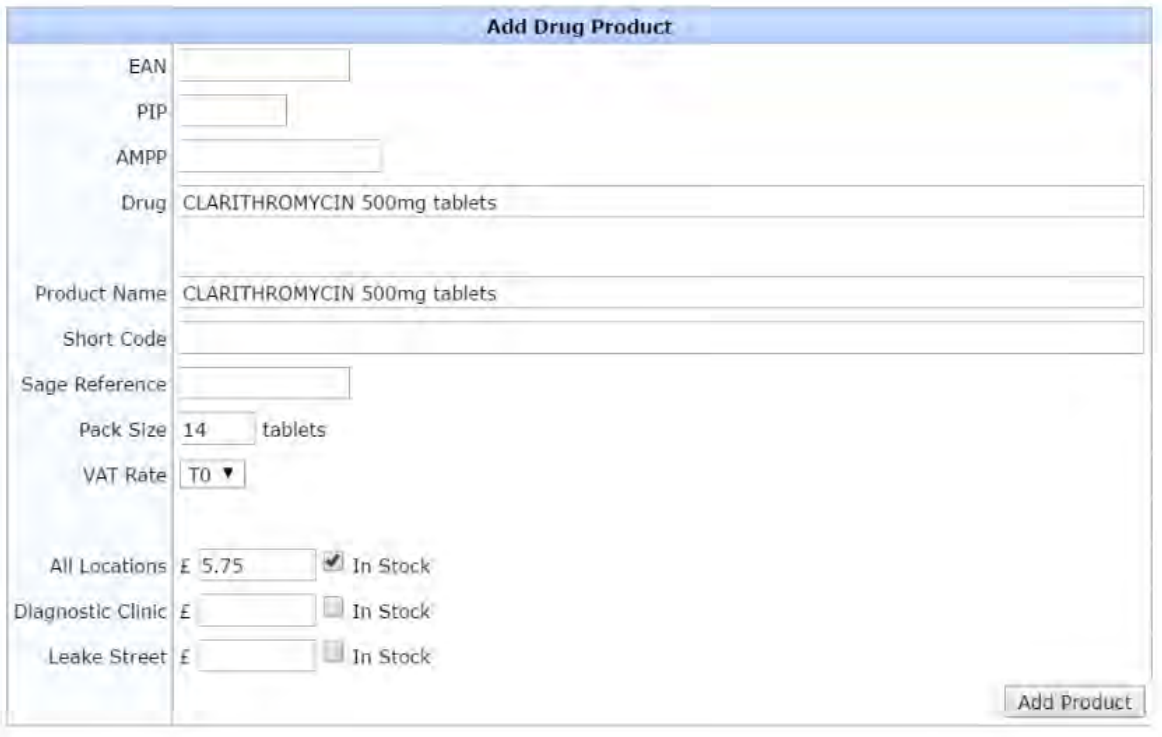
Add drug products as products

If you want to prescribe and sell drug products to patients, you must add them as products. Then you must add the products to at least one contract and assign a price. Once you have done this, drug products can be prescribed to patients who are assigned to those contracts.

If you want to monitor the quantities of drug products available, you can treat them as stock items, although this is optional. To do this, see *Add drug products as stock (page 7)*.

To add a drug product:

1. Select **Drug Products** in the **Products** menu. A table of existing drug products displays on the left and the **Add Drug Product** form displays on the right of the **Drug Products** page.



2. Start entering the name of the drug required into the **Drug** field and the auto-complete box displays matching search results. Alternatively, use a barcode scanner to enter the EAN barcode number which populates the other fields. Allocate the price of the drug at each location.
3. Select the pack size that you want.
4. Select **In Stock** if you want to use stock control.
5. Click **Add Product**.

All the location-based pricing set here are the prices on the private contract. Prices can be set for other contracts using the pricing wizard although it is not recommended, because, when practitioners use the prescribing tool, it uses the private contract price.

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Add a new product to existing contracts

Before you can use products, which include appointments and classes, you must apply a price to them and make them available on contracts.

To add a product to existing contracts:

1. Select **Wizards** in the **Products** menu.
2. Select **Add Product Wizard** in the **Wizards** menu.
3. Follow the four steps of the add product wizard.

Step 1 - select product

Start entering the product name. This works on an auto-complete system; enter part of the product to display matching products. Select the one that you want to add to one or more contracts.



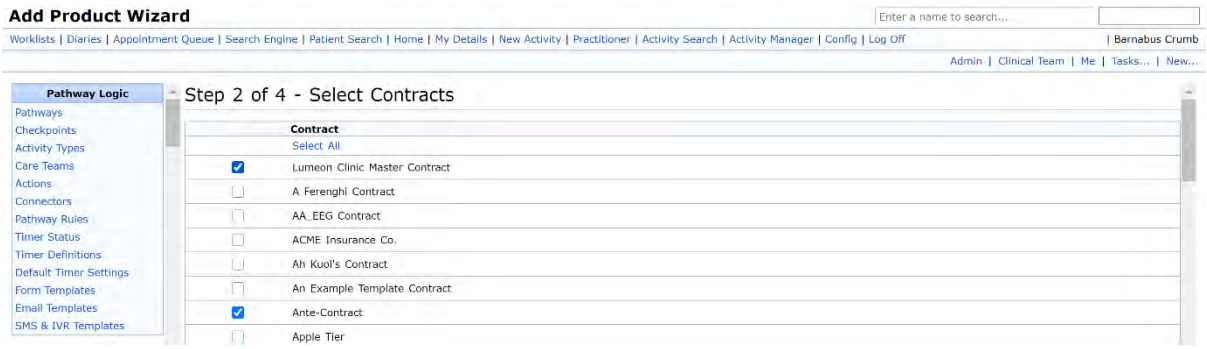
Enter an effective date, or leave blank if the product should become effective immediately. You can add a product with retrospective effective dates.

Conductor does not allow users to make bookings for products before the effective dates or after the product expiry date (if set). If no expiry date is set, the product is available indefinitely. Transaction dates can be before the effective date.

Click **Next**.

Step 2 - select contracts

Select the contract(s) and/or template contract(s) that you want the product to be added to.



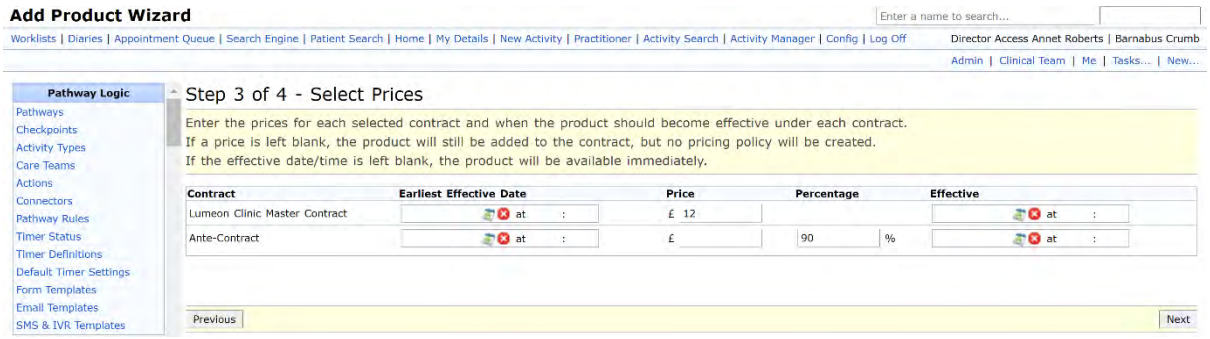
Click **Next**.

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Step 3 - select prices

Enter the price for each selected contract and when the product should become effective under each contract. If a price is left blank, the product is still added to the contract, but no pricing policy is created.

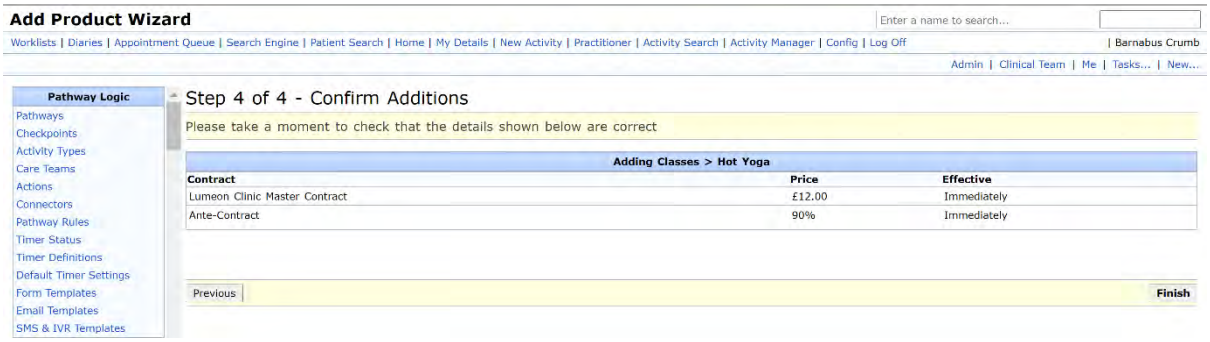
If the effective date/time is left blank, the product is available immediately.



Click **Next**.

Step 4 - confirm additions

Confirm that the product is being added to the correct contracts, and that the contract prices and the effective dates are correct.



Click **Finish** to complete adding the product to the contracts.

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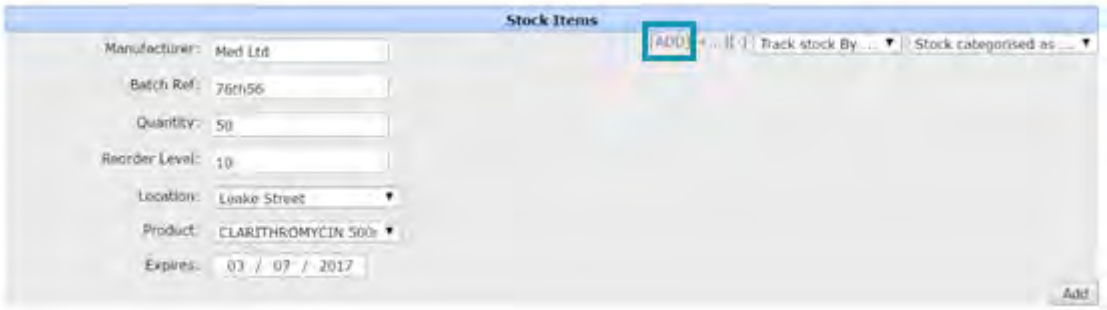
Add drug products as stock

To add drug products as stock:

1. Select **Stock** in the **Products** menu. This displays a list of all stock items, and their quantities in square brackets.

   You can use the **Track stock by** drop-down list to view the stock list by **Product** or by **Location**. You can filter the list into different categories by selecting an option in the **Stock categorised as** drop-down list, such as **Drugs** or **Medical Equipment**.

2. Click **[ADD]** to display a form to add a new stock item.



3. Enter the drug product's details using the fields in the table below. You cannot add a stock item that has the same manufacturer and batch reference as a current stock item.

4. Click **Add**.

Stock fields

Complete the drug product's details using the following table. Fields with an asterisk are mandatory.

Field name	Description
Manufacturer	Maker of the product.
Batch Ref *	Enter the batch reference. It is a free text field and you can decide the structure. You cannot add a stock item that has the same manufacturer and batch reference as a current stock item.
Quantity *	Number of stock items. This decreases in number as stock items are sold.
Reorder Level *	Quantity at which Conductor informs you that you must order more stock. If the stock number is below the reorder level, it is highlighted red in the **Stock** page.
Location *	Select the location where the stock is to be added.
Product *	Select the product that stock is to be added for. The product must have been set up as a stock item when it was created.
Expires	Enter the expiry date of the stock. Once a stock item has expired, it is highlighted in the **Expires** column.

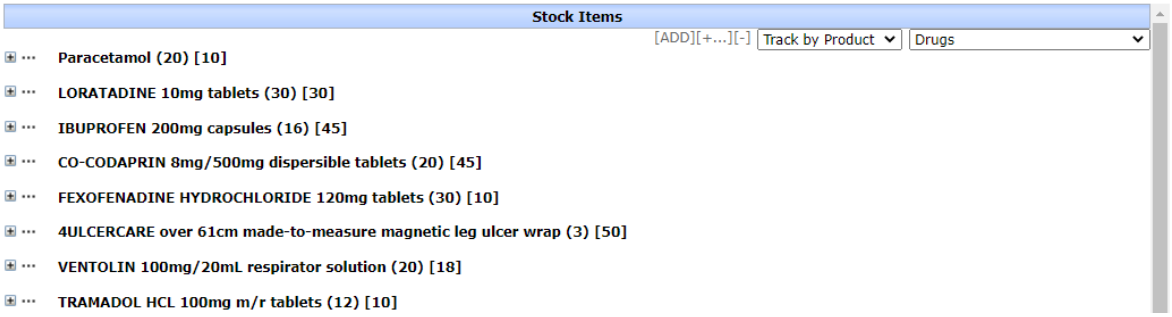
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Transfer stock between locations

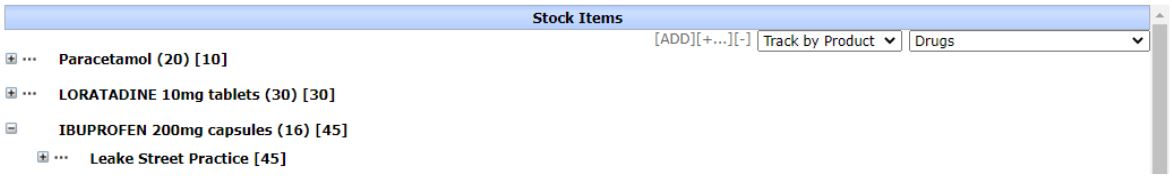
You can transfer stock from one location to another. To do this:

1. Select **Stock** in the **Products** menu. The **Stock Control** page is displayed.

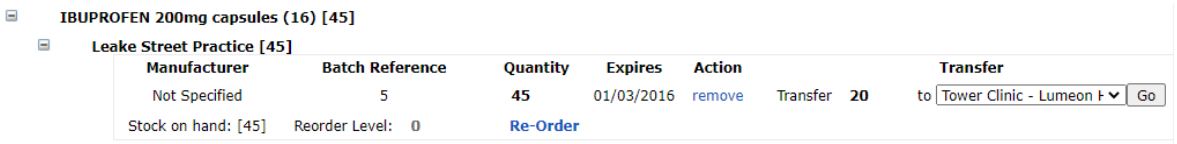
2. You can filter the stock items by selecting a category such as **Drugs** in the **Stock categorized as** field in the top right corner of the page. The number in square brackets after the product name is the total quantity in stock across all locations.



3. Click **+** next to the product that you want to transfer. This displays the locations which have stock of this product. The number in square brackets after the location is the quantity in stock at that location.

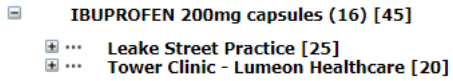


4. Click **+** next to the location that you want to transfer stock from. This displays a form which enables you to transfer stock to a different location.



5. Enter the number of items you want to transfer in the **Transfer** field, and select the location from the drop-down list that you want to transfer stock to.

6. Click **Go**. The new stock quantity at both locations is now displayed.



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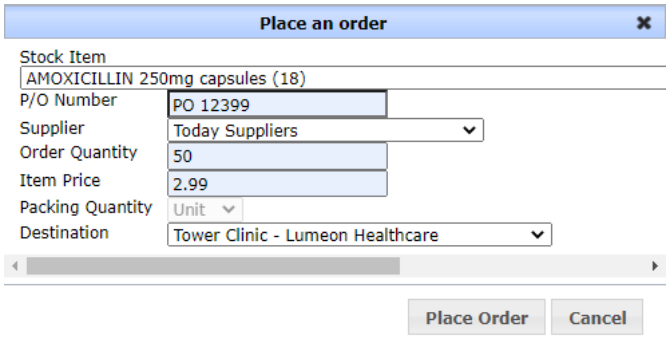
Order drug products

You can record an order for a single drug or a purchase order for many drugs.

Single drug

To record an order for a single drug:

1. Select **Stock Orders** in the **Products** menu.
2. Click **Quick Order**. This displays the **Place an order** form for a single item.



3. Enter the drug product's details using the fields in the table below.
4. Click **Place Order**.

Single drug order fields

Complete the drug product's details using the following table.

Field name	Description
Stock Item	Select the stock item from the drop-down list. If the product does not appear here, check that it has been designated as stock in the product screen.
P/O Number	Enter the purchase order number. This is a mandatory field.
Supplier	Enter the supplier. You can create suppliers using **Stock Suppliers** in the **Products** menu.
Order Quantity	Enter the number of stock items ordered.
Item Price	Enter the price of each item.
Destination	Select a location from the drop-down list.

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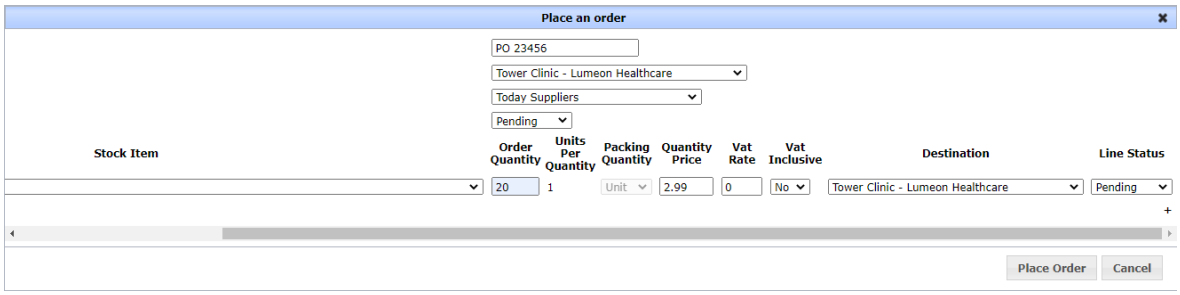
Multiple drugs

To record a purchase order for multiple drugs:

1. Select **Stock Orders** in the **Products** menu.
2. Click **Order Multiple Items**. This displays the **Place an order** form for multiple items.



3. Enter the drug product's details using the fields in the table below.
4. Click **+** on the right hand side below the order line to display another order line.



5. Continue to enter additional drug products, as required.
6. Click **Place Order**.

Multiple drug order fields

Complete the details of the purchase order and the drug products using the following tables.

Complete the following purchase order details:

Field name	Description
Purchase Order Number	Enter the purchase order number. This is a mandatory field.
Delivery Location	Select a location from the drop-down list.
Supplier	Enter the supplier. You can create suppliers using **Stock Suppliers** in the **Products** menu.

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Field name	Description
Order Status	Default is **Pending**. Select a status for this item from the drop-down list: · Pending · Cancelled · Back Order · Partial · Returned · Received

Complete the following individual order item details:

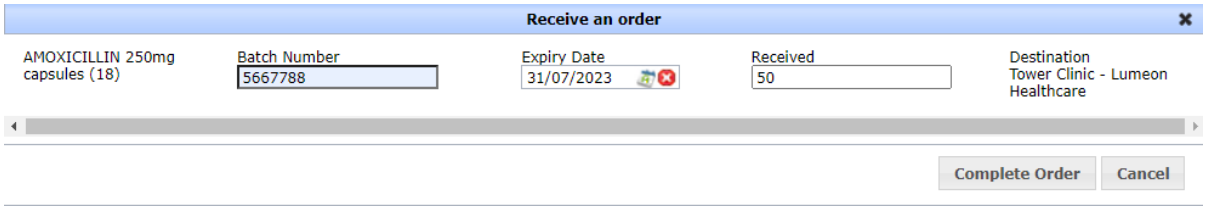
Field name	Description
Stock Item	Select the stock item from the drop-down list. If the product does not appear here, check that it has been designated as stock in the product screen.
Order Quantity	Enter the number of stock items ordered.
Quantity Price	Enter the price of each item.
VAT Rate	Enter the VAT rate.
VAT Inclusive	Select from the drop-down list whether or not VAT is included in the price.
Destination	Default is the **Delivery Location** in the order details. You can change it to a different location in the drop-down list.
Line Status	Default is **Pending**. Select a status for this item from the drop-down list: · Pending · Cancelled · Back Order · Partial · Returned · Received

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Change or receive orders

You have the following options in the list of **Current Open Orders**:

- **Amend Order** - Make the required changes to the order and click **Update Order**.
- **Receive Order** - The Receive an order form is displayed. Enter the batch number and expiry date, and update the quantity received, if necessary. Then click **Complete order**. The order disappears from the list of **Current Open Orders** and stock numbers are updated in **Stock**.



- **Cancel Order** - Cancels the order immediately, without a warning message. It disappears from the list of **Current Open Orders**.
- **Print Order** - Prints the order.

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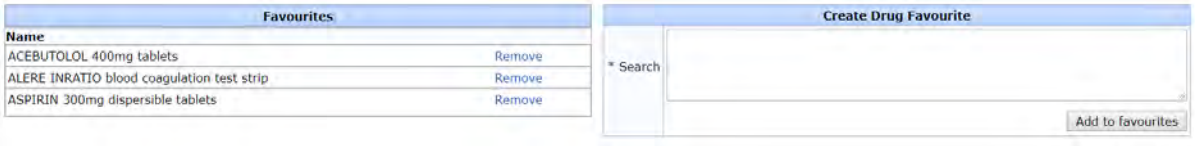
Prescribe drug products

See ***Prescriptions in Lumeon Conductor*** for information on prescribing drugs and other items.

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Drug favourites

To add drugs to your list of favourites, select **Drug Favourites** in the **Products** menu.



This selection then displays in a drop-down list on the prescription form.

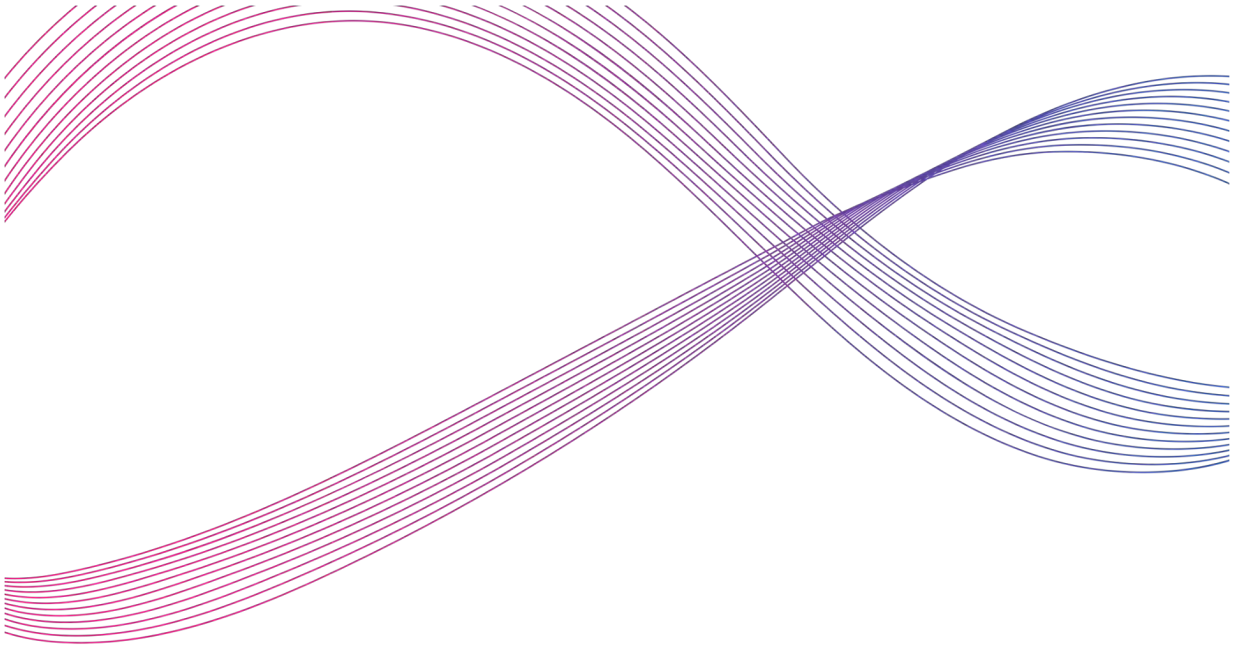


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Glossary

SafeScript	An international set of databases providing information about drugs, such as ingredients, side effects, contraindications, and use in pregnancy. See *https://www.safescript.com/*.

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Electronic Medical Records in Lumeon Conductor 24.2

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Introduction

The Electronic Medical Record (EMR) enables Lumeon Conductor to capture and display clinical data and records in a single central record for each patient. It is a cloud-based record with advanced security that is only accessible to practitioners.

The EMR has a mix of standard pages, such as **Overview**, **Journal** and **Prescriptions**. It also has bespoke pages which can be set up to capture client-specific data. For example, each patient can have customizable pages for each specialty that is relevant to them.

Purpose

The purpose of this document is to:

- Explain how to set up the EMR and create bespoke EMR pages - see *Set up the EMR (page 4)*.
- Describe how to:
  - Use the EMR - see *Use the EMR (page 13)*.
  - Manage prescriptions - see *Prescriptions (page 17)*.
  - Add medication - see *Add medication (page 24)*.
  - Order lab tests - see *Lab tests (page 25)*.
  - Record physical examinations - see *Physiotherapy examination (page 27)*.
  - View Physitrack information - see *Physitrack integration (page 29)*.
- Describe the security points that control access to EMR functionality - see *Security points (page 31)*.

See also ***Prescriptions in Lumeon Conductor*** for further information on prescriptions and medication.

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Set up the EMR

System administrators and directors or practitioners with system administration access can set up the EMR.

See also *Security points (page 31)* for information on the security points that control access to EMR functionality.

Create bespoke EMR pages

You can use EMR pages to capture clinical data which can then be included in clinical reports. To create a bespoke EMR page, you must build up a bank of questions that can be used within that page.

There are a range of different question types that you can use. You can configure the responses to those questions to remain displayed on either an appointment, referral, or full patient history basis. See ***Forms in Lumeon Conductor*** for details of all available question types.

Create questions

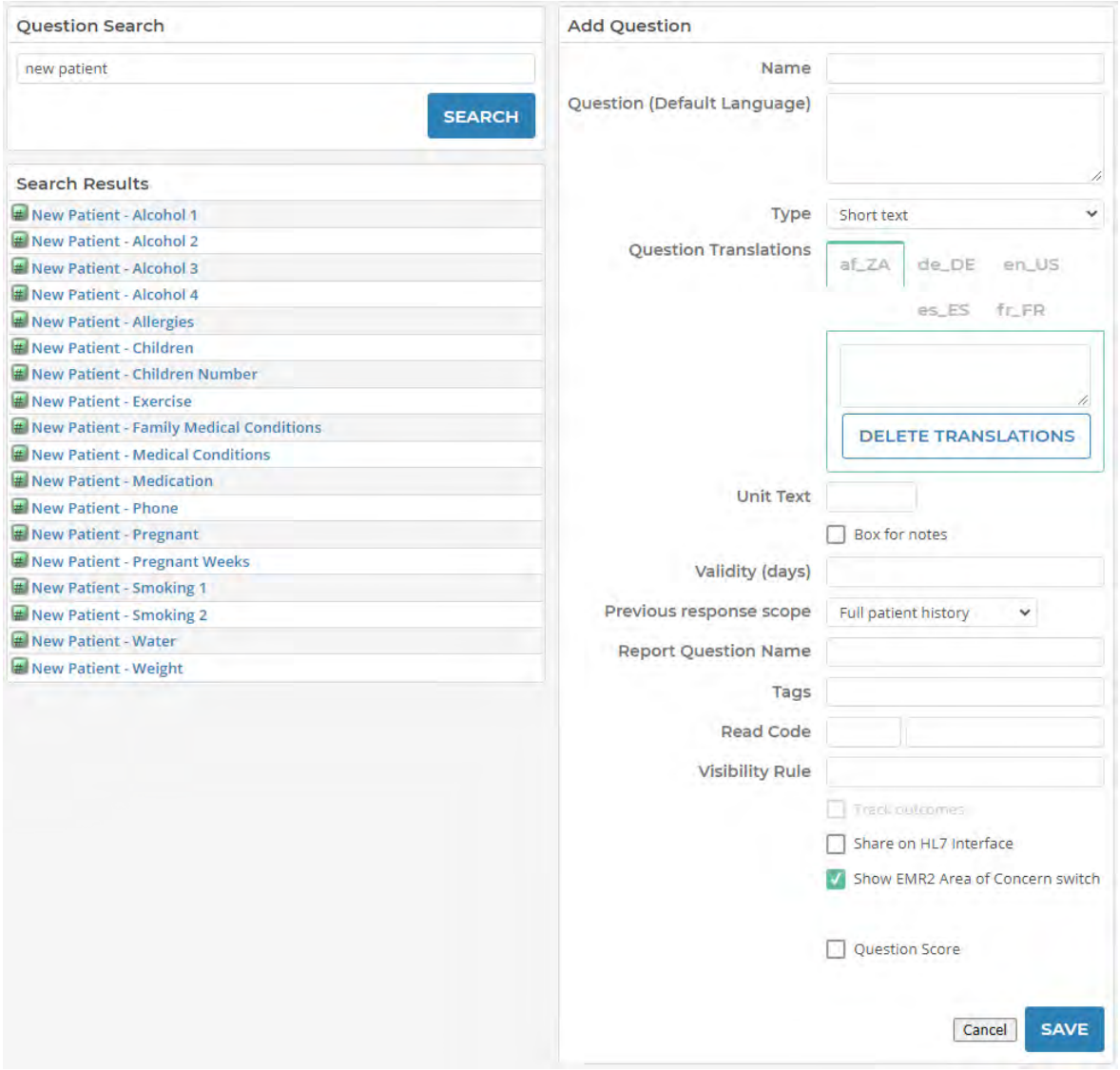
When you build a form, a list of questions is not available. Instead you use the **Question Search** to find the questions you want to include in the form. Therefore, Lumeon recommends that you use a naming convention when you create questions to ensure that they are easy to find when you build the form. For example, you may want to prefix questions with the type of form, the location, or specialty where the form will be used, or the practitioner who will use the form.

To create questions to be used in one or more forms or EMR pages:

1. Select **Questions** in the **Forms & EMR** menu. The **Question Search** displays on the left and the **Add Question** form displays on the right.

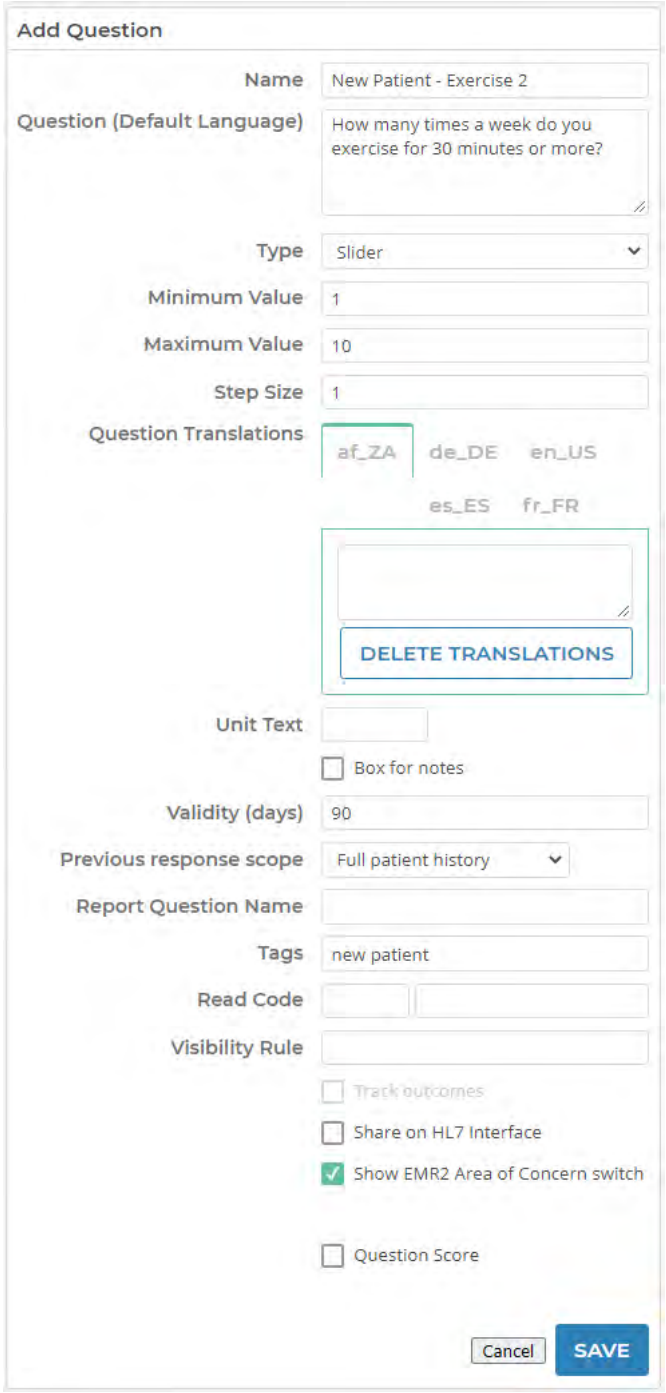
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2. To see if a question already exists, enter a key word in the **Question Search** field on the left and click **Search**.



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3. To create a new question, complete the **Add Question** form using the table below, and click **Save**.



4. Continue to add the questions that you want to include in the new form.

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Question fields

Complete the question details using the following table. Other fields may display depending on the **Type** you select.

Field name	Description
Name	Enter a name for the question. For example, **Number of units of alcohol per week**. You can use this name, along with tags, to search for the question. Since it is not possible to see a list of created questions, we recommend that a naming convention is used either in the question name or in the tag so that you can easily search for questions. This name is also displayed if the question and response are displayed on the overview page.
Question (Default Language)	Enter the actual wording of the question that is visible to the practitioner. For example, **How many units of alcohol do you drink a week?**.
Type	Specify the question response type you require, for example, **Short text**, **Yes or no**, or **Multiple choice**. Please note, barcodes can be scanned into any text input field. For multiple choice, enter the different choices one under another. See *Appendix 1 - Question types* for the available question types.
Unit Text	Unit text for the answer. For example, **cm**, **kg**, **hours**. This displays after the field.
Box for notes	Select this check box to create a box for notes which can be displayed either underneath a question or to the side, depending on the layout type.
Validity (Days)	Set the period that the answer is valid for. Options are: · **Leave blank** - The previous response prepopulates the answer field when a new form or EMR page is created using the same question. For example, use this when creating a question to record a patient's height because their height is unlikely to change. · **Enter 0** - No response displays in the answer field when a new form or EMR page is created using the same question. For example, use this then when creating a question to record a patient's weight because this may be different every time a form is completed for that patient. · **Enter a number** - The last response appears in the answer field for that many days when a new form or EMR page is created using the same question.
Previous response scope	Select which responses are displayed when viewing that question in other forms or EMR pages.  Options are: · **Full patient history** – All previous responses are displayed under the question. · **Same referral only** – Only shows responses to questions in forms linked to that referral. · **Same appointment only** – Only shows responses to questions filled in for that particular appointment. These responses are visible to all practitioners looking at the patient's EMR.
Report Question Name	Name of the merge field in the clinical report if EMR2 is configured.
Tags	Tags are useful for producing EMR2 reports or looking for questions. **Question Search** can look up the question name or the tag. For example, all questions relating to height could be tagged **height**.
Read Code	Enter a read code which is saved in the database and can be used when generating custom reports.
Visibility Rule	
Track outcomes	Enables reports to track outcomes. This can be used with number, height, or weight question types to create a graph of responses.

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Field name	Description
Share on HL7 Interface	Select this to share with HL7, and enter the **Order Interface Name**.
Show EMR2 Area of Concern Switch	Informs whether the questions displays on the EMR2 Area of Concern switch.
Question Score	Enables scoring for different responses to this question - see *Form scoring*.

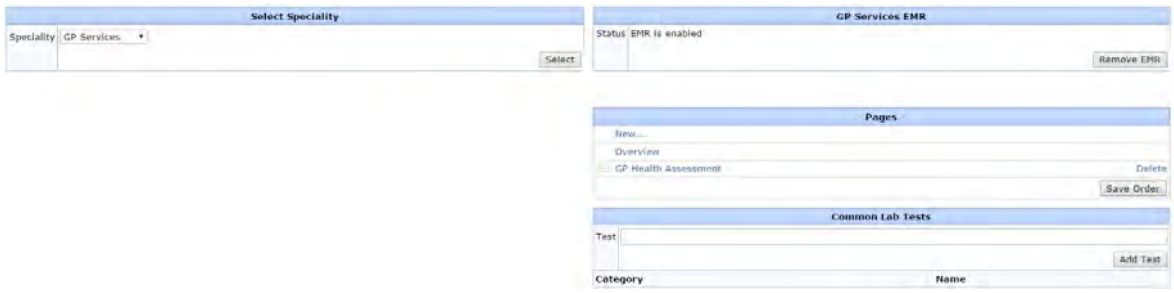
Build EMR pages

Once you have created questions, you can use them to build EMR pages. If EMR is enabled, you can create customizable pages for practitioners of that specialty to access. These pages are only visible when an appointment of that specialty has been booked.

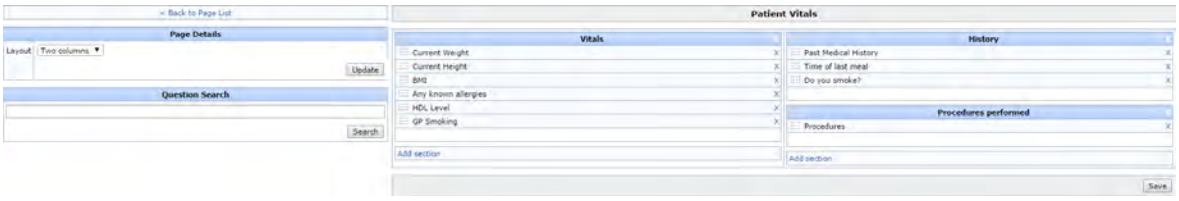
To build an EMR page:

1. Select **EMR** in the **Forms & EMR** menu.

2. Select a specialty from the drop-down list and click **Select**. This displays whether EMR is enabled or not for that specialty.



3. Click **New** in the **Pages** section to display the **EMR Page Builder** window.



4. In the **Page Details** section, select the desired layout of the page from the drop-down list in the **Layout** field and click **Update**.

5. Enter a name for the page by clicking on **New Page** in the section on the right hand side, enter the page name and press **Enter**.

6. Click **Add Section** and enter a name for the section.

7. Search for previously created questions by entering a key word or tag in **Question Search** and click **Search**.

8. Drag the required questions into the appropriate sections. To make a question mandatory, select the check box to the right of the question.

9. When you have finished building the EMR page, click **Save**.

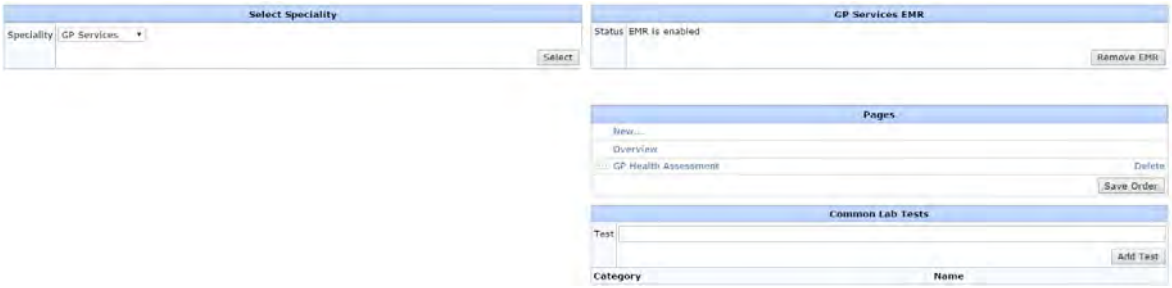
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Build an overview page

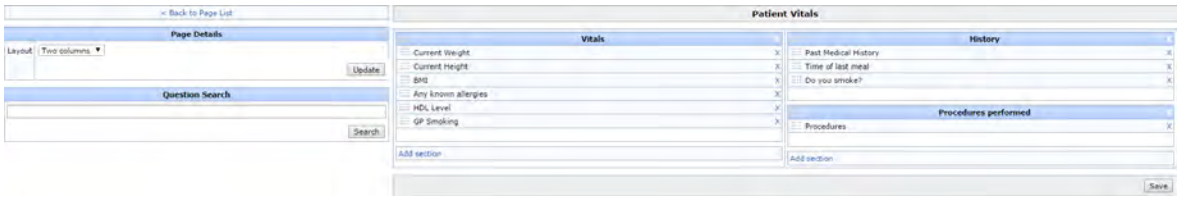
You can configure the EMR so that particular responses to questions are automatically displayed on the overview page. To do this:

1. Select **EMR** in the **Forms & EMR** menu.

2. Select a specialty from the drop-down list and click **Select**. This displays whether EMR is enabled or not for that specialty.



3. Click **Overview** in the **Pages** section to display the **EMR Page Builder** window.



4. In the **Page Details** section, select the desired layout of the page from the drop-down list in the **Layout** field and click **Update**.

5. Enter a name for the page by clicking on **New Page** in the section on the right hand side, enter the page name and press **Enter**.

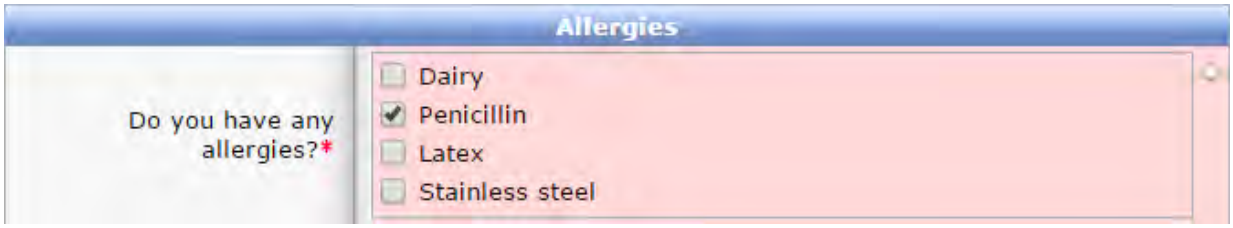
6. Click **Add Section** and enter a name for the section.

7. Search for previously created questions by entering a key word or tag in **Question Search** and click **Search**.

8. Drag the required questions into the appropriate sections. To make a question mandatory, select the check box to the right of the question.

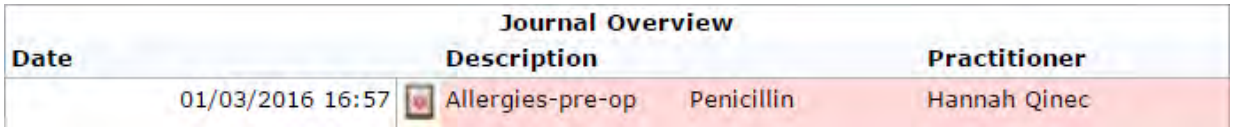
9. When you have finished building the EMR Overview page, click **Save**.

As a practitioner, you can make other question responses visible on the **Overview** page if you consider them particularly pertinent. To do this, select the circle to the right of the question either two or three times to highlight the question in orange or red, to ensure the key information is noted.



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The question and response are then visible on the **Overview** page.



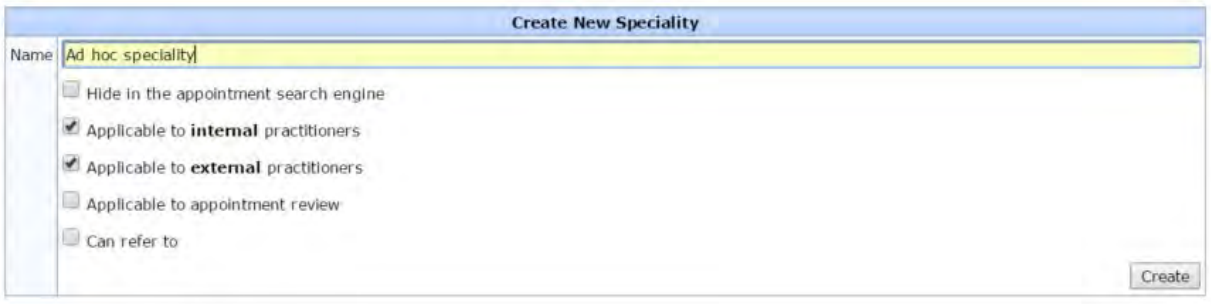
Create ad hoc appointment pages in the EMR

As a practitioner, you can create an EMR tab for ad hoc appointments. These are appointments that have not occurred in the diary. For example, if you want to record information from an appointment that was held elsewhere but would prefer to enter data rather than uploading scanned documents into the patient's paper archive.

A patient must have at least one appointment booked in the system before you can add an ad hoc appointment.

To create an ad hoc appointment page, you need to create an ad hoc specialty, and link it to an appointment type, practitioners and the EMR form.

To create an ad hoc appointment as a specialty, select **Specialties** in the **People** menu. Enter the name of the specialty and click **Create**.



To create an EMR page associated with the new ad hoc specialty, click **EMR** in the **Forms & EMR** menu.

Select the specialty from the drop-down box and ensure that EMR is enabled for the speciality. Build the EMR page with required questions and ensure that it is saved.



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To create an ad hoc appointment type, click **Ad-Hoc Appointment Types** in the **Forms & EMR** page. Complete the section on the right and ensure that the previously created ad hoc specialty has been selected. Click **Create**.



The new ad hoc appointment type now appears in the list on the left.

Ensure that practitioners that are to use this feature have the new ad hoc specialty assigned to them. To do this, update each practitioner's profile using the **Practitioner** option in the **People** menu.

The ad hoc appointment pages are now ready to use by practitioners who have the `EMR.AddTab` security point enabled.

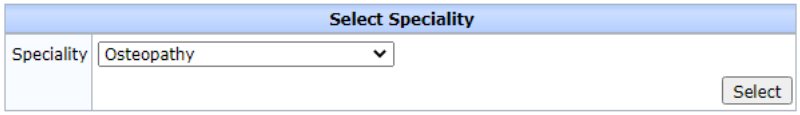
Add lab tests

If there are common lab tests that you regularly order, you can set them up on the **EMR Labs** page as a quick check box rather than having to searched for them. Lab tests must be enabled for your organization to use this feature.

Common lab tests are set up on a per specialty basis.

To add common lab tests:

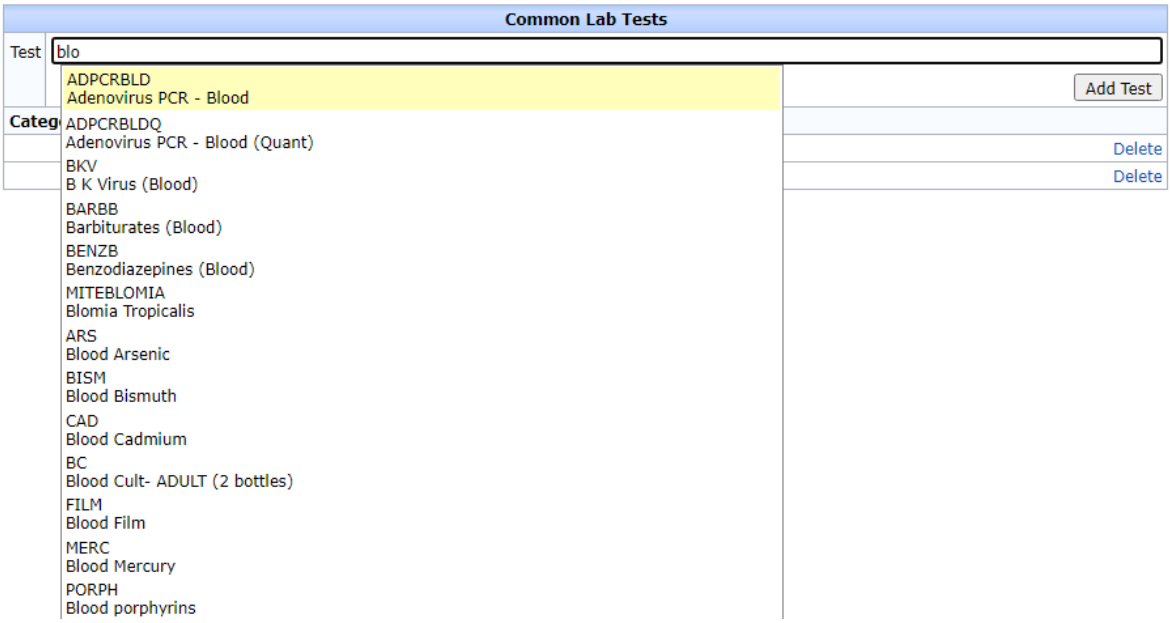
1. Select **EMR** in the **Forms & EMR** menu. The **Select Specialty** form is displayed.



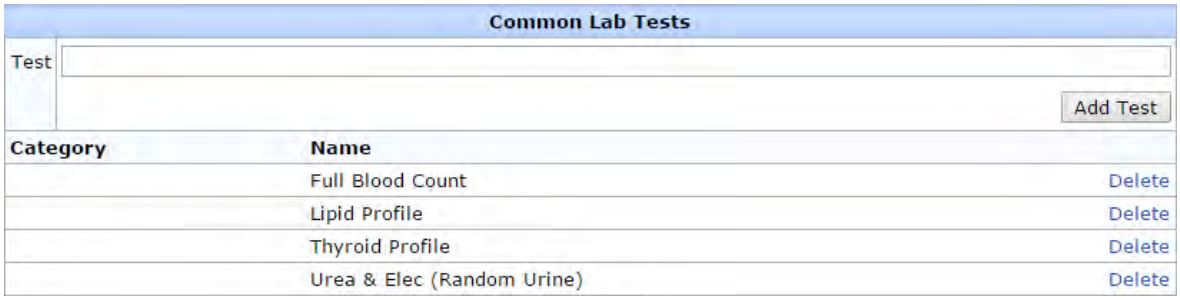
2. Select a specialty from the drop-down list in the **Specialty** field. The **Common Lab Tests** form appears on the right hand side of the screen.

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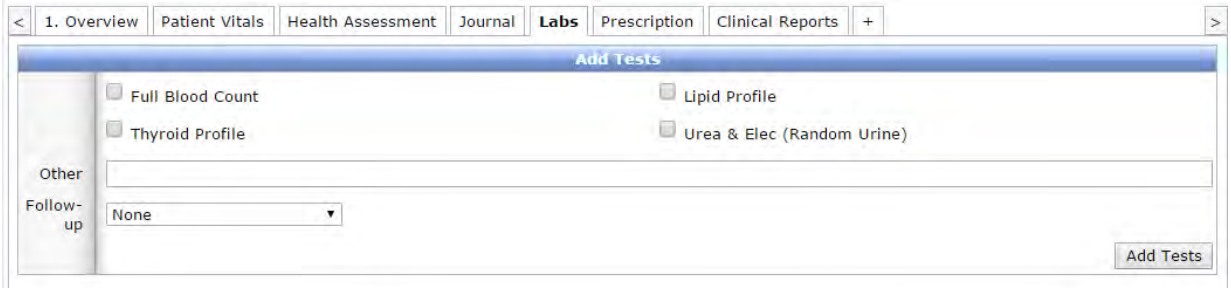
3. Start typing the name of the test in the **Test** field. The autocomplete feature displays search options that match the entered text, and you can select the required test.



4. Click **Add Test**. Repeat to add other tests. The tests display in the list of tests below.



The tests you add here also display in the **Labs** tab of a patient's EMR.



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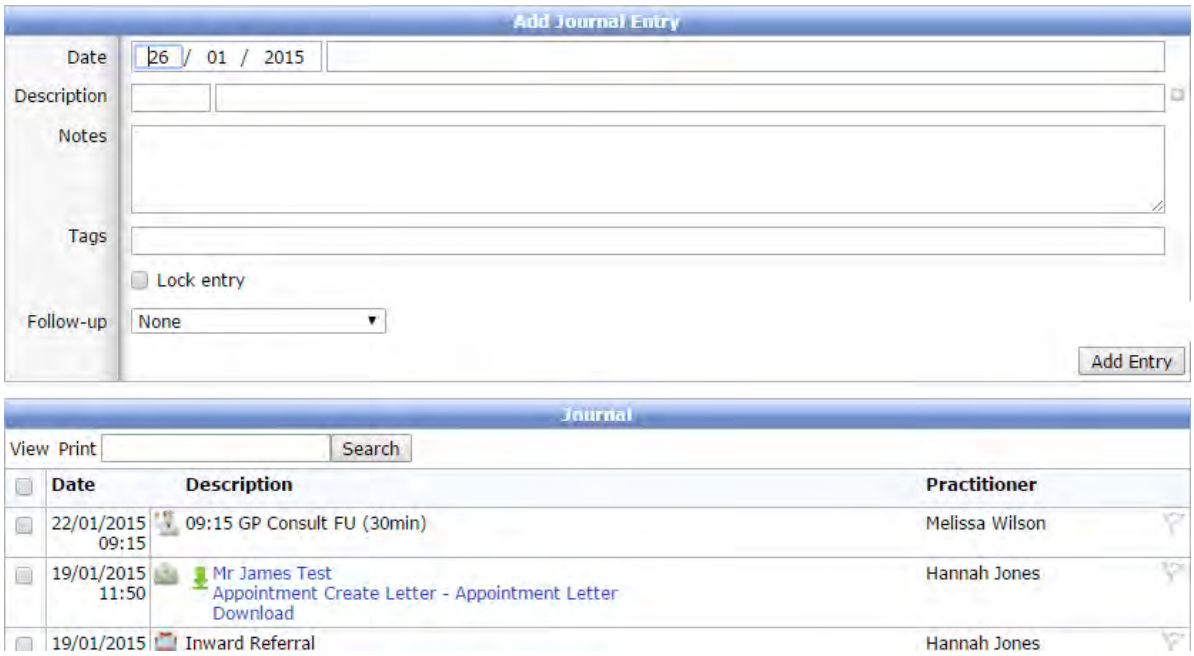
Use the EMR

EMR journal

The journal is the master copy of all the data recorded for the patient and can be found within the patient EMR. You can view a patient's complete history and a timeline of all events in the EMR journal.

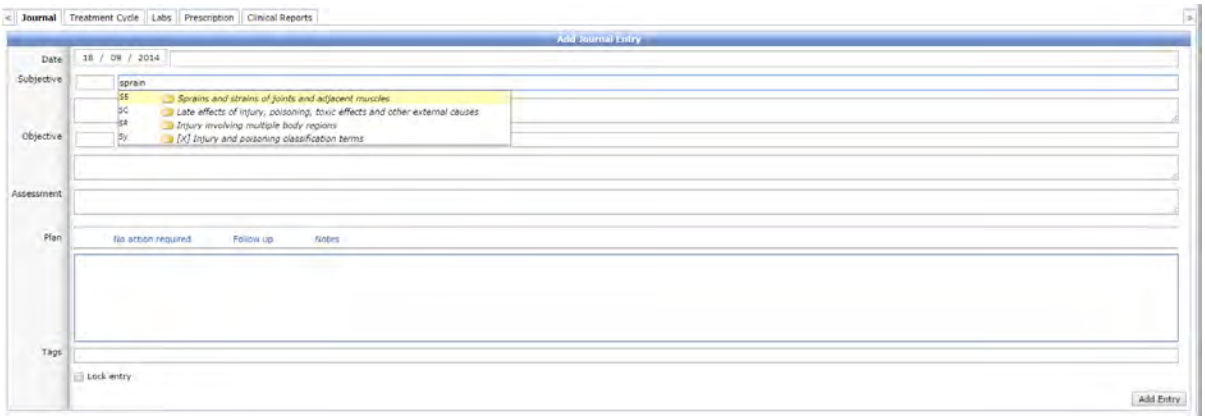
It is possible to group events by type or to show some sections and not others. You can do this using the **View** menu. The default view shows everything in reverse chronological order. Conductor saves the journal view preferences for each practitioner.

The journal view also highlights any responses in the form sections so that they stand out.



The journal can be configured to have either a generic notes layout or a ***SOAP notes*** layout. See *https://en.wikipedia.org/wiki/SOAP_note* for more information on SOAP notes.

With both configurations, you can enter ***Read Codes***. Enter the SNOMED CT or Read Code if known; or search for the required condition or treatment. You can enter some free text to provide context and background to entries.



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You can enter tags in a journal entry. You can then use them to filter the journal entries history.

Check **Lock Entry** to lock an entry so that its contents are not visible in the journal history. The entry can be unlocked by any practitioner who can view that patient's account but it will show an audit trail.

Click **Add Entry.**

You can change or delete journal entries by clicking on the entry in the journal. **Amend** and **Delete** appear at the bottom.

Click **Amend** to re-enter data in the journal entry. Once this is done, click **Amend Entry** to save changes. Once the data is saved, it is highlighted with a purple border. The border indicates that the data has been changed from the original entry. To see a history of changes, click again on the box and click **History.** A complete list of changes, as well as who made them, appear.



Click **Delete** to delete an entry. Enter a comment to explain the deletion (this is optional) and click **Delete Entry**. The deleted entry will be highlighted with a purple border. There is also the option of seeing the history of the entry or undeleting it.



To compress deleted entries, make sure that **Compact** is selected in the **View** menu.



To add a follow-up to any of the journal entries, select the type of follow-up from the drop-down menu when creating an entry, or click on the flag  to the right of a previously created journal entry.

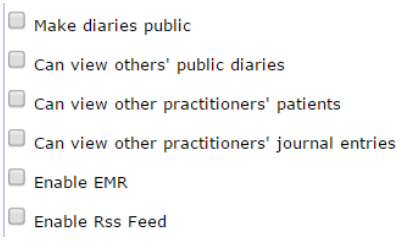


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Capture data using the EMR

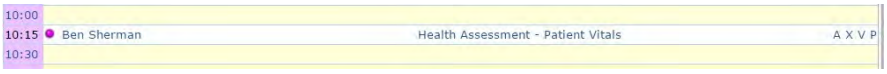
The EMR is only available to practitioners who have an account with EMR enabled. This feature is entirely customizable.

The EMR page is divided up into a series of tabs along the top of the screen with pages below corresponding to each tab. Selecting any of these tabs displays a variety of different pages or forms which have been tailored to your organization's specifications and can differ depending on your specialty.

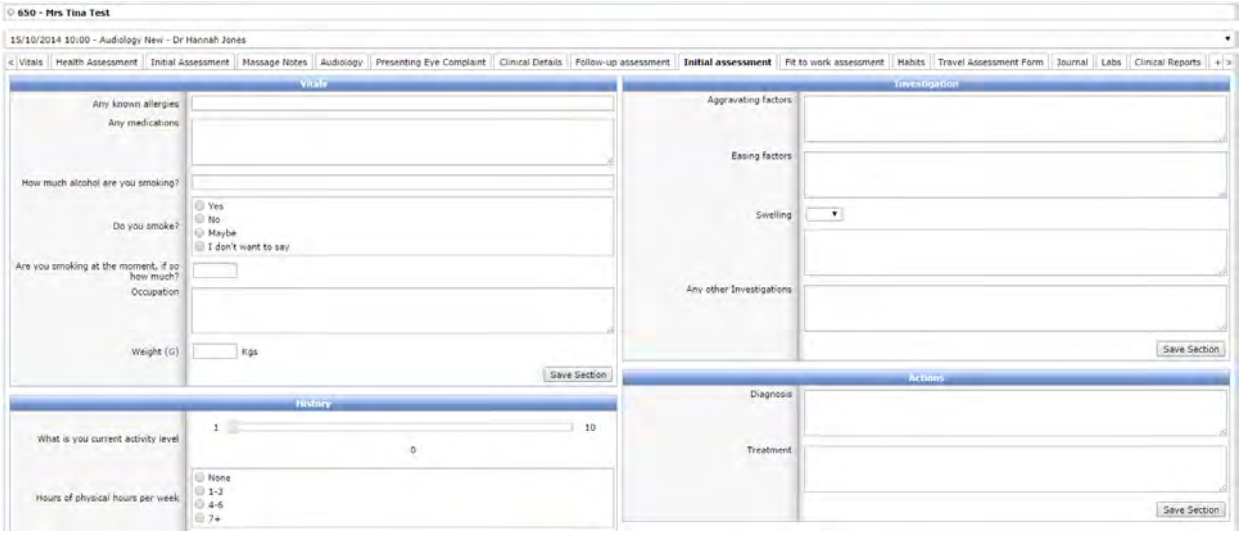


To access the EMR, click the patient's name in the diary or select **EMR** in the patient's menu on the right, if an appointment has already been selected.





The EMR screen is divided into a series of tabs along the top of the screen with pages below corresponding to each tab. Select any of these tabs to display a variety of different pages or forms which have been tailored to your organization's specifications and can differ depending on the your specialty.



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The data contained in these pages are designed to enable you to fill in common data quickly and easily, so that it can then be tracked or used to create clinical reports. Form responses can be auto-filled based on either the appointment or referral history as well as the patient history.

Click on the dot on the right to highlight the information in yellow, orange, or red depending on the number of clicks. Information highlighted in orange or red is then displayed in the **EMR Overview** page.

At the very top of the screen an appointment is displayed. Select this to display other appointments linked to the patient. This allows data to be associated with a specific appointment. This is useful when entering data retrospectively.

Every EMR has a **Journal** and **Overview** page.

The **Overview** page displays responses to selected questions, as defined while configuring the EMR, and responses that have been highlighted red or orange by a practitioner.

Ad hoc appointments

As a practitioner, you can use ad hoc appointment pages in the EMR to record information from an appointment that was held elsewhere rather than uploading scanned documents into the patient's paper archive.

These pages must be initially configured by an administrator or system administrator.

Click the **+** tab in the patient's EMR. Select the appointment type and record the date that is relevant to the information in the pop-up box. Click **OK**.

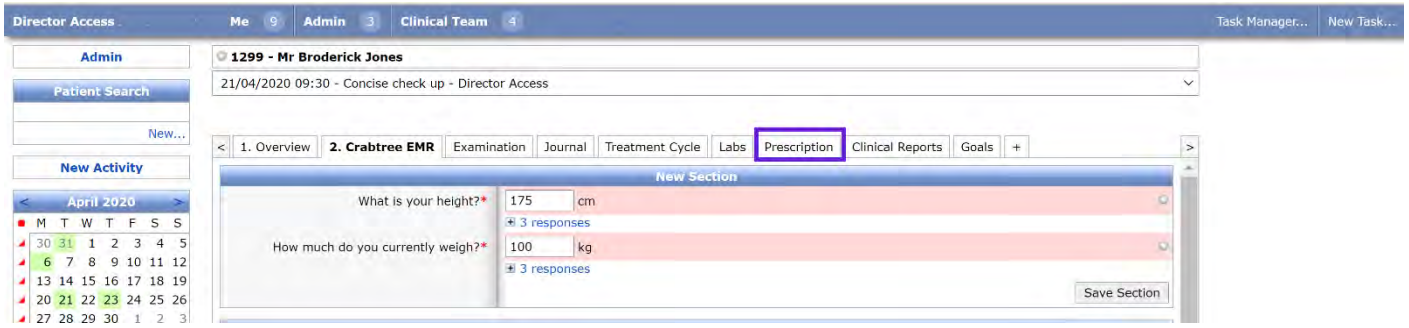
A new EMR tab appears with the previously entered date and the title of the appointment type. Complete the form as necessary. A patient must have at least one appointment booked in the system before you can add an ad hoc appointment.

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Prescriptions

If configured, you can create and print prescriptions by clicking the **Prescription** tab in the patient EMR. You must have a GMC number entered in your personal details in order to access the prescription page.

Only practitioners can generate prescriptions and, therefore, the feature only displays in the practitioner user interface.

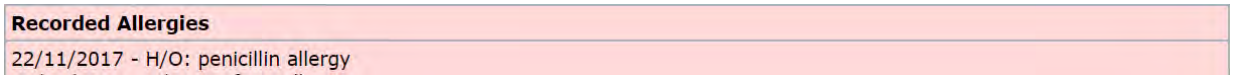


See also ***Prescriptions in Lumeon Conductor*** for further information on prescriptions and medication.

Recorded allergies

You enter allergies in the EMR **Journal** tab.

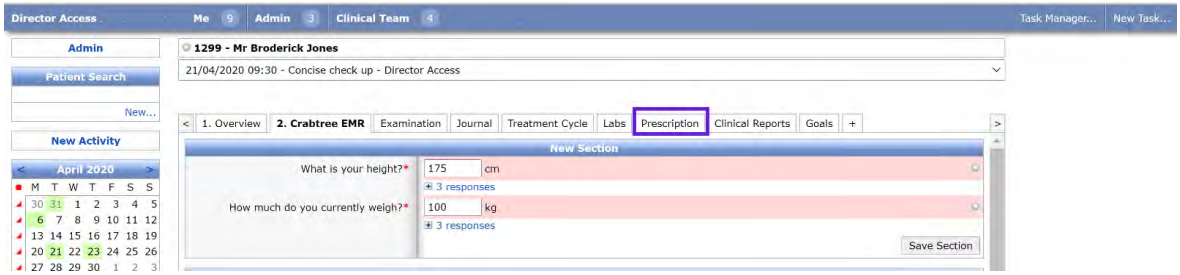
Conductor displays a red banner at the top of the **Prescription** tab to clearly indicate if a patient has any allergies recorded on their medical record. Conductor uses ***SNOMED CT*** or ***Read Codes*** to enable a broad application of allergic classifications to be recorded on a patient record.



Create a prescription

To create a new prescription:

1. Search for a patient to display their Electronic Medical Record (EMR), and then select the **Prescriptions** tab.

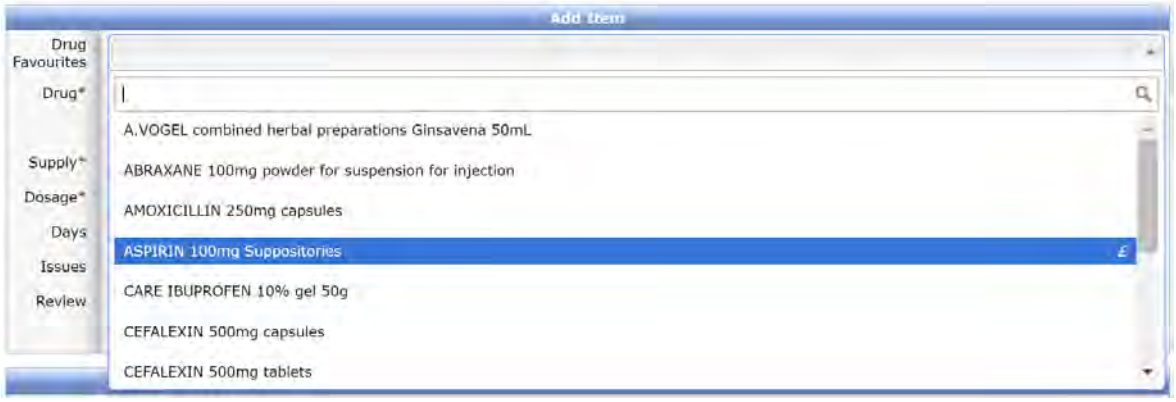


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2. Use the **Drug** field to search for the medication that you want to prescribe. Start typing the name of the medication and a list of drugs that match the entered text is displayed. Select the correct drug from the drop-down list.



3. Alternatively, select a drug favourite from the drop-down list in the **Drug Favourites** field.



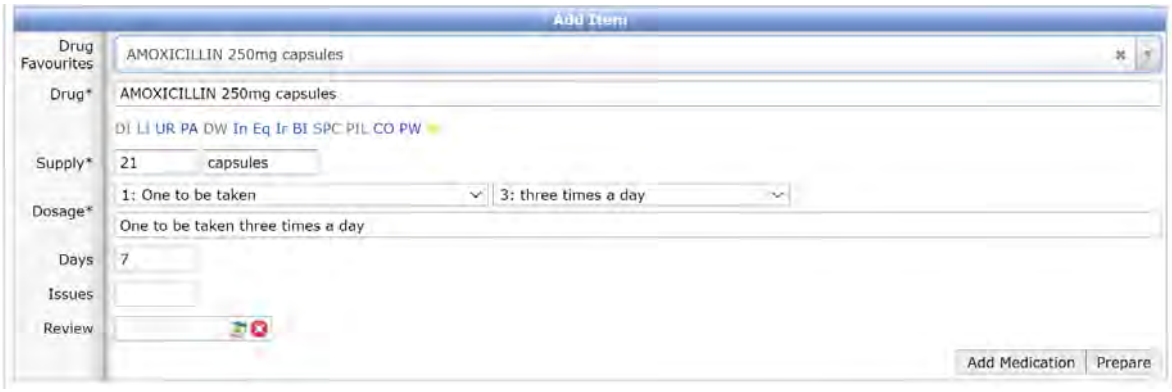
Search results that display a pound sign (£) next to them indicate the following:

- The drug is linked to a drug product.
- The drug has pricing applied to the item.
- The drug is available on the private or self-pay contract.
- You can decrement the stock of the item.

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4. Select an item and the supply and dosage information auto-populates from the ***SafeScript*** database. You can amend the supply and dosage information, which in turn updates the dosage text. You can select a dosage option when there are two different descriptions in the ***SafeScript*** database.

   Next to **Dosage**, there are two short fields above and one longer field below. Select the dosage from the drop-down list in the first short field. Select further dosage instructions in the second short field, as appropriate. A longer version of the text displays in the field below, based on the options selected in the two short fields. The text in the longer field appears on the prescription. You can change this, if required.

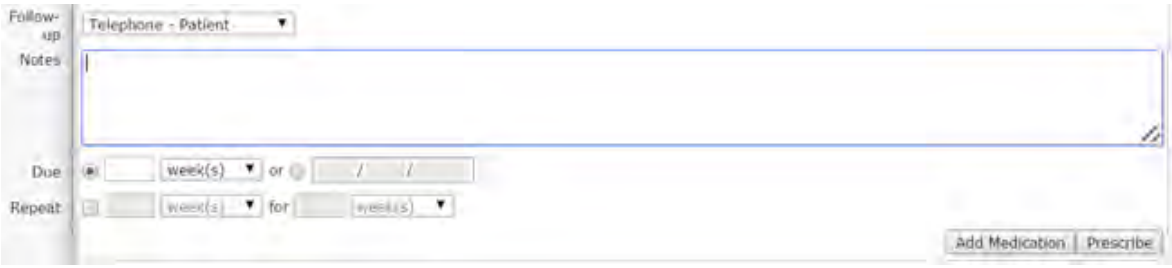


5. Enter the number of issues and select a review date, if necessary.

6. If the product is a drug product stock item, select **Decrement Stock** to indicate that the item is coming out of stock.



7. If the prescription requires a follow-up, select the type of follow-up from the drop-down list and enter the due date and any notes. You can also set up repeat follow-ups.



8. Click **Add Medication**.

9. Repeat to prescribe other items, as required.

10. Click **Prescribe**.

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11. The prescribed items appear in the **Prepare Prescription** section where you can confirm the details and check to see if there are any interactions with the patient's current medication. You may see a pop-up window so you can confirm the prescription if contraindications or interactions exist. This is configurable - contact Lumeon Support if you want this feature enabled.

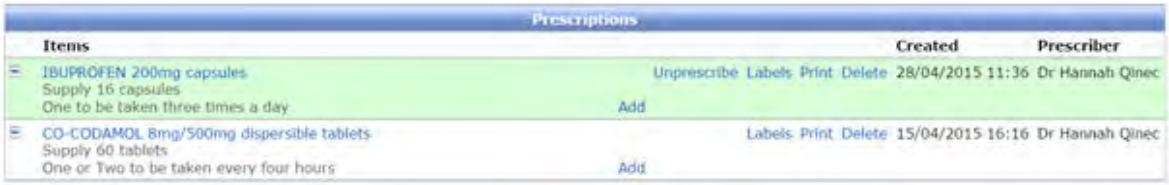


12. If you selected **Decrement Stock**, select the quantity of items and batch.

13. Click **Add Digital Signature** to enter a digital signature which is printed on the prescription.



14. When you have checked the prescription items, click **Prescribe** to generate the prescription. The prescription displays in the list of prescriptions. The prescription items are charged to the payor of the appointment.



You have the following options in the list of prescriptions:

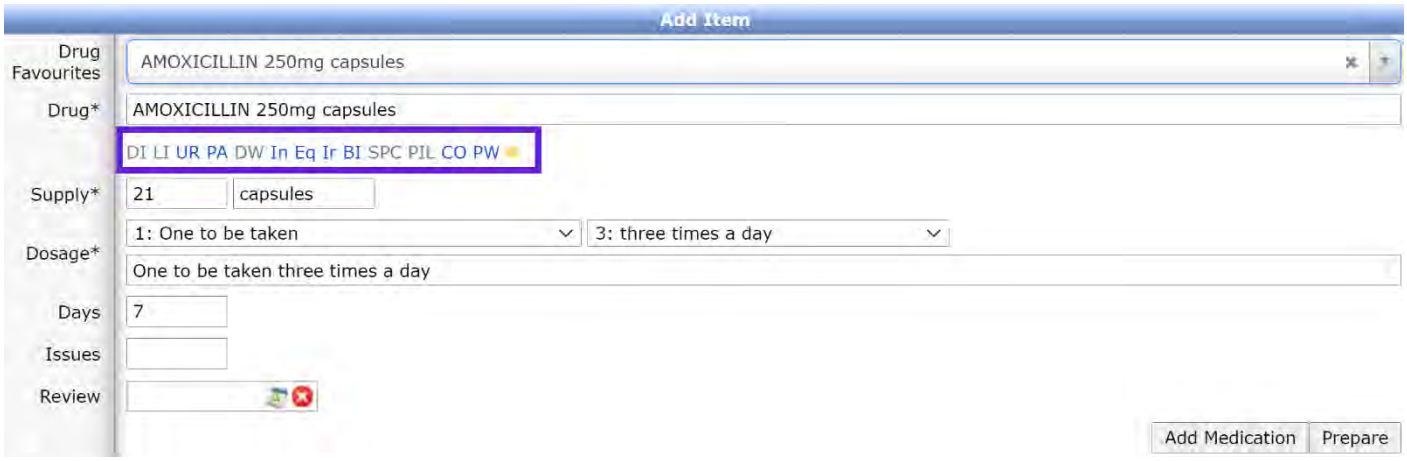
- **Add** - Populates the fields in the **Add Item** section, allowing you to add medication again. Current medication is highlighted in green.
- **Unprescribe** - Stops the prescription. The **Unprescribe** option is only available to the user who created the prescription and disappears after 2 hours.
- **Labels** - Prints labels for the prescriptions.
- **Print** - Prints the prescription. You can print prescriptions on normal A4 headed paper. Each prescription print out has a unique ID. This is different to the prescription number and changes each time a printable copy of a prescription is generated.
- **Delete** - Removes the item from the patient's medication list.

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Additional clinical information

The ***SafeScript*** integration provides additional clinical information.

Once you have searched for and selected medication, Conductor populates additional data about the pharmaceutical product that you should consider before prescribing for the patient.



You can view additional information by clicking on the following letters:

- **BI** – BNF Interactions
- **CO** - Contraindications
- **DI** - Dosage Information
- **DW** – Doctor Warnings
- **Eq** – Equivalents
- **In** – Ingredients
- **Ir** –Interactions
- **LI** – Licensed Indications
- **PA** – Patient Advisories
- **PIL** – Patient Information Leaflet
- **PW** – Pregnancy Warnings
- **SPC** – Summary of Product Characteristics
- **UR** – Usual Routes

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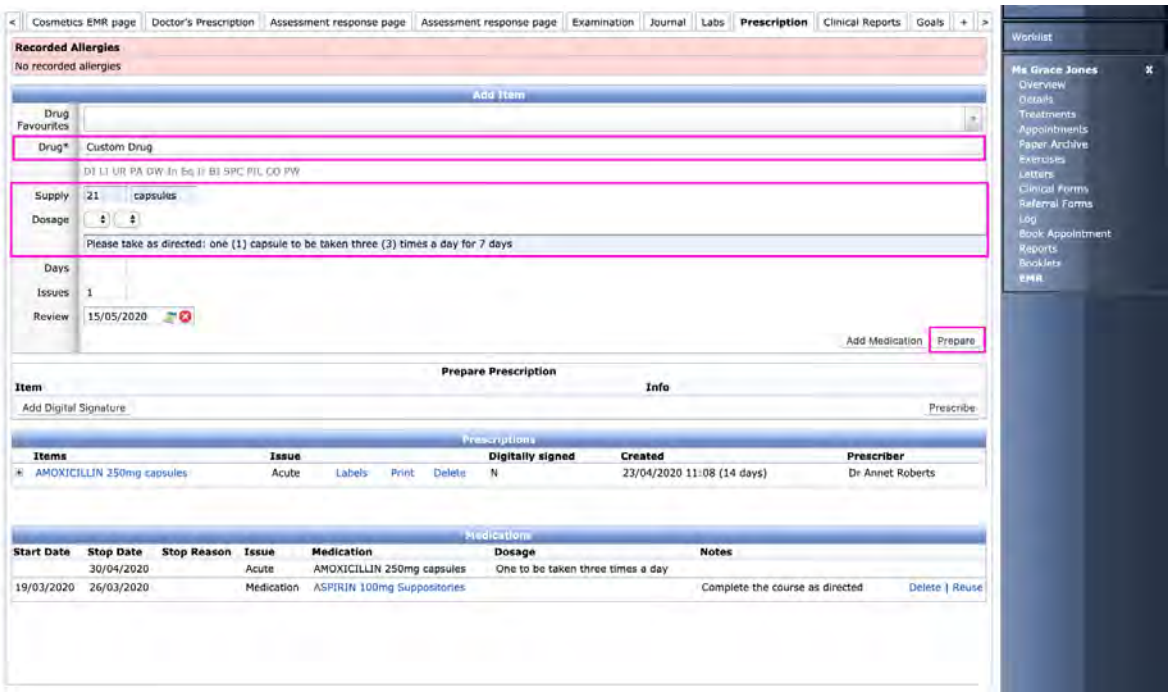
Custom drug prescriptions

Practitioners can also prescribe medication that is not listed within the ***Safescript*** database.

For any custom drug prescription, the additional clinical Information does not display because the product is not included within the ***SafeScript*** database. It is therefore your responsibility to provide the patient with any extra information themselves.

To enter a custom drug prescription:

1. Enter the name of the medication in the **Drugs** field.



2. Enter **Supply** information.
3. Enter **Dosage** information.
4. Click **Prepare**.

For all custom drug prescriptions, the message **Unlisted product - availability unknown** displays in yellow in the **Drug Availability** field.

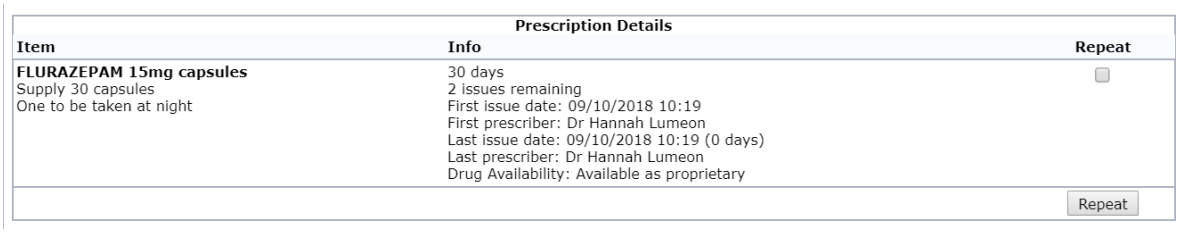
> ⚠ When you prescribe custom drugs, no information regarding contraindications or pregnancy warnings are displayed. You should provide this information to the patient.

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Repeat prescriptions

To create a repeat prescription:

1. First select the name of the prescription. The medication details appear in the **Prescription Details** box.



Prescription Details

Item	Info	Repeat
FLURAZEPAM 15mg capsules Supply 30 capsules One to be taken at night	30 days 2 issues remaining First issue date: 09/10/2018 10:19 First prescriber: Dr Hannah Lumeon Last issue date: 09/10/2018 10:19 (0 days) Last prescriber: Dr Hannah Lumeon Drug Availability: Available as proprietary	☐
		Repeat

2. Select the **Repeat** check box for the item you want as a repeat prescription, and then click the **Repeat** button to generate the repeat prescription.

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Add medication

To record medication against a patient's EMR without generating a prescription:

1. Follow the steps outlined in *Create a prescription (page 17)*, but select **Add Medication** and not **Prescribe**.



2. Enter the start date, stop date, reason for stopping the medication, and any notes.
3. Click **Add**. This medication appears in the section below where it can be deleted or reused. Prescribed medication is highlighted in green.

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Lab tests

Conductor can be integrated with most laboratories.

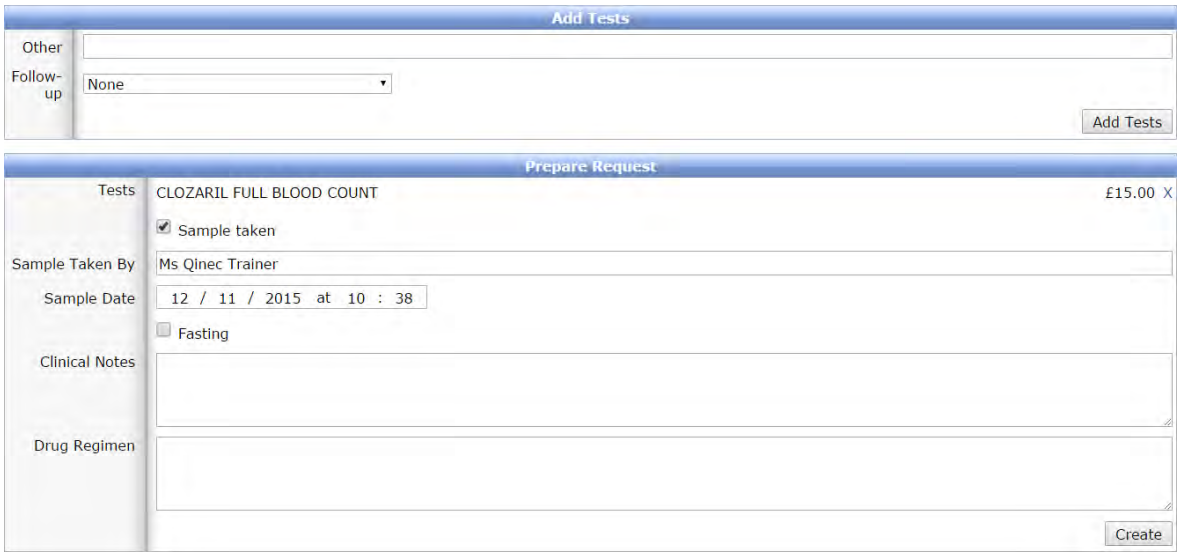
To order lab tests:

1. Select the **Labs** tab in the patient's EMR. Some quick pick test types are displayed in the top half of the **Add Tests** form. These are specific to the specialties that have been allocated to appointment types.



2. Select the test from the displayed options or use the search bar in the **Other** field to find other tests. Start typing the name of the test and a list of tests that match the entered text is displayed.

3. When you have selected the required test, click **Add Tests**. The request is prepared and the price of the test is displayed on the right-hand side.

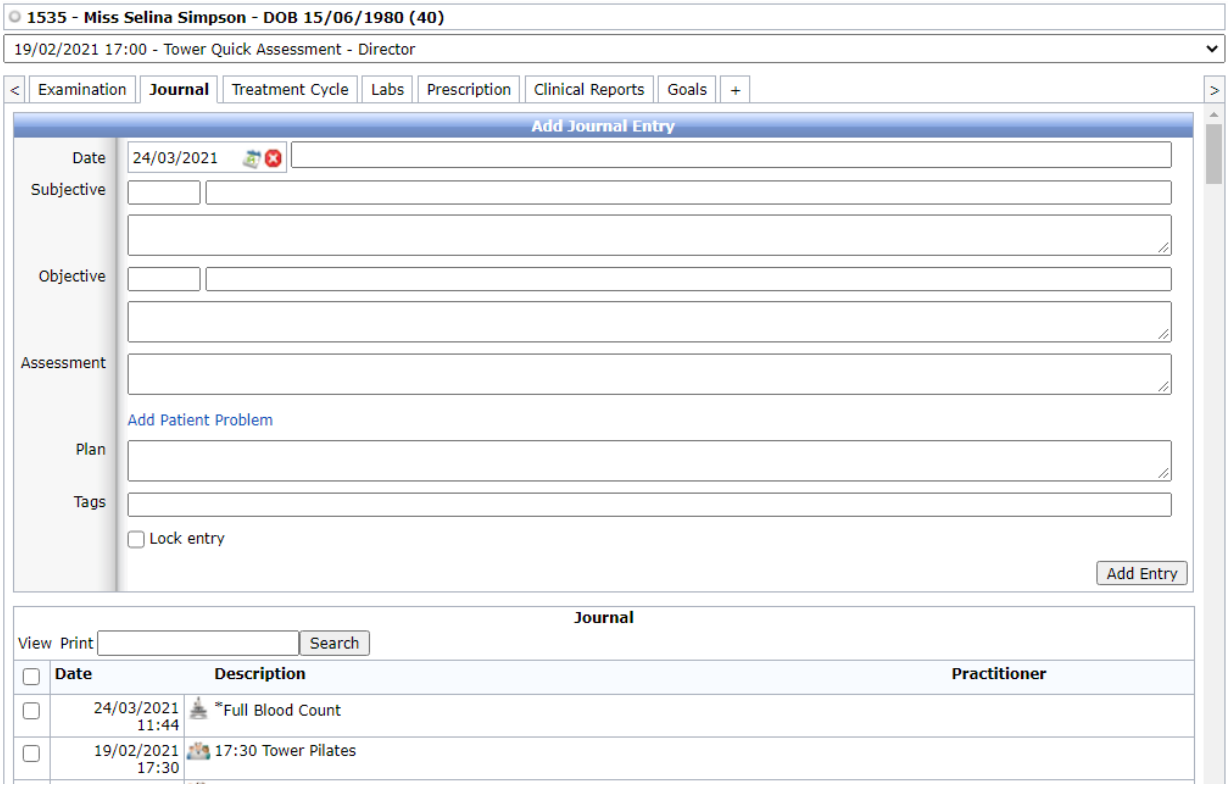


4. Add further clinical notes or drug information if required.

5. Add any further tests to the request and then click **Create**. This generates the request which can then be printed out and attached to the sample(s).

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Once a test has been requested, it appears in the **Journal** with an asterisk next to it to indicate that it is pending.



The lab will note the request ID and ensure that the results are matched with the request.

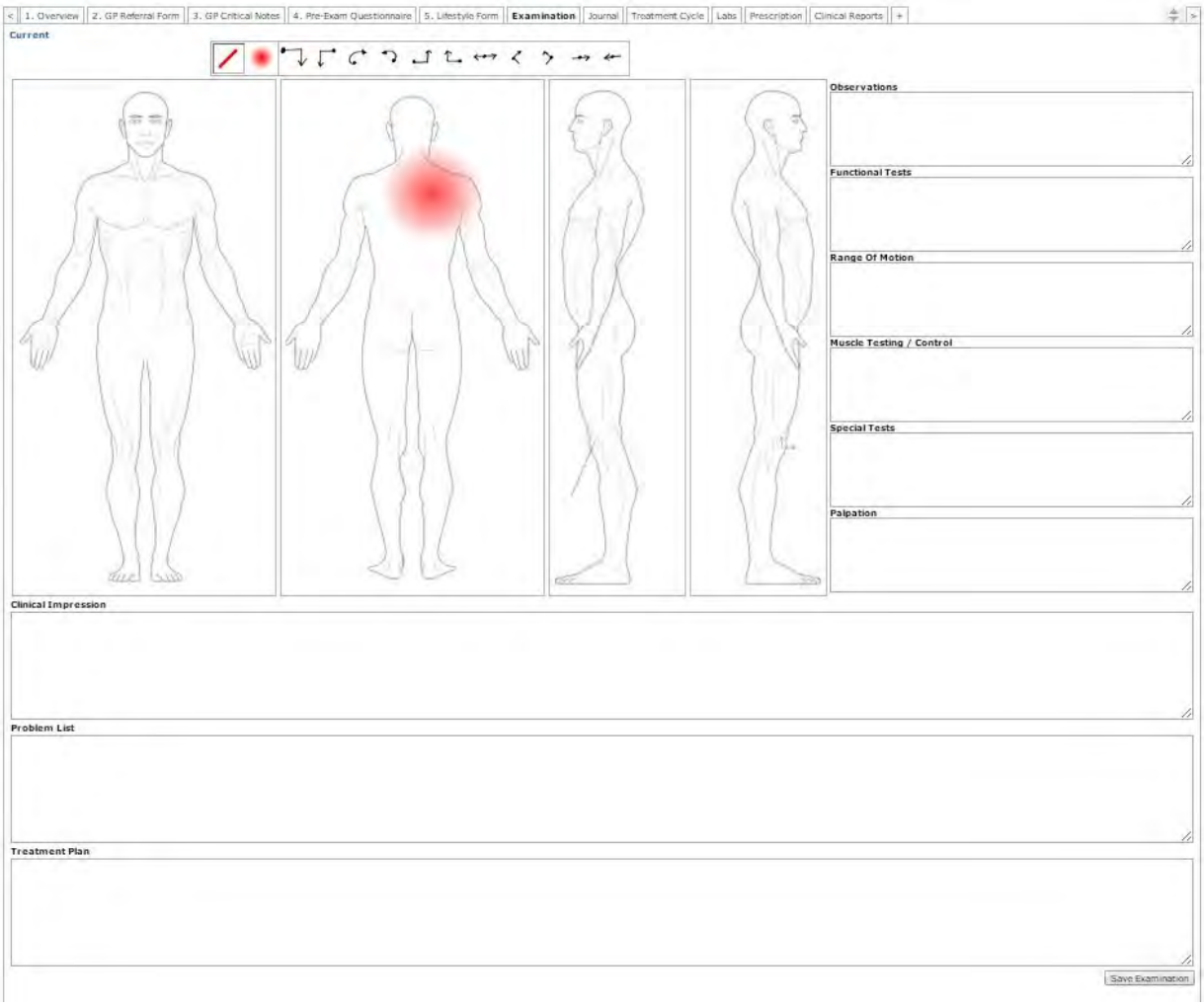
When the results are ready, the practitioner who requested the results is notified by a task and email, depending on your configuration settings. The results appear on both the **Overview** page and in the **Journal**. A returned result no longer displays an asterisk.

If the result is out of range, colours are used to indicate abnormality. Blue colours are low and red colours are high.

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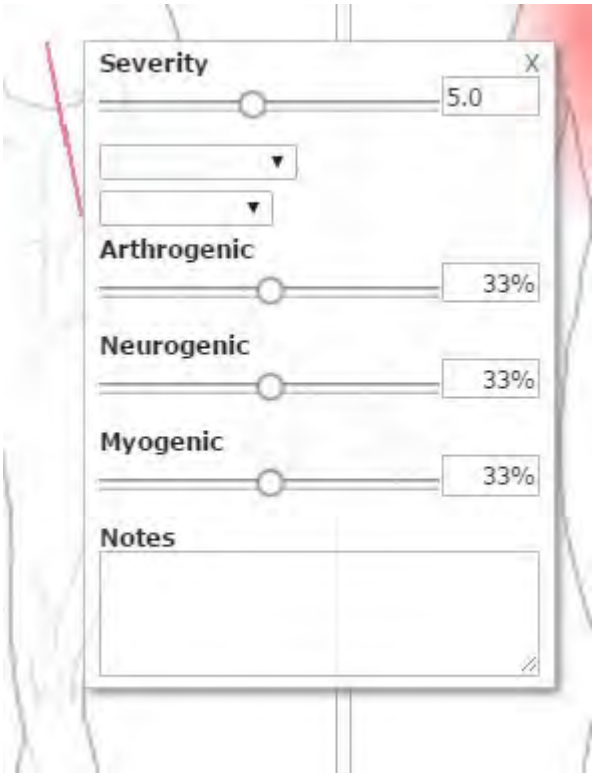
Physiotherapy examination

The **Examination** tab in the patient's EMR enables physiotherapists to record patient examinations.



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To use the red pain area markers, select them in the toolbar, then click on the selected area and drag to the required size. You can also enter other details, such as severity, type of pain, and notes.



To make this box reappear, double click on the pain marker. Right click on the pain marker to delete it.

To use the arrows, drag them from the tool bar to the required area. Other details can then be entered. To make this box reappear, double click on the pain marker. Right click on the arrow to delete it.

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Physitrack integration

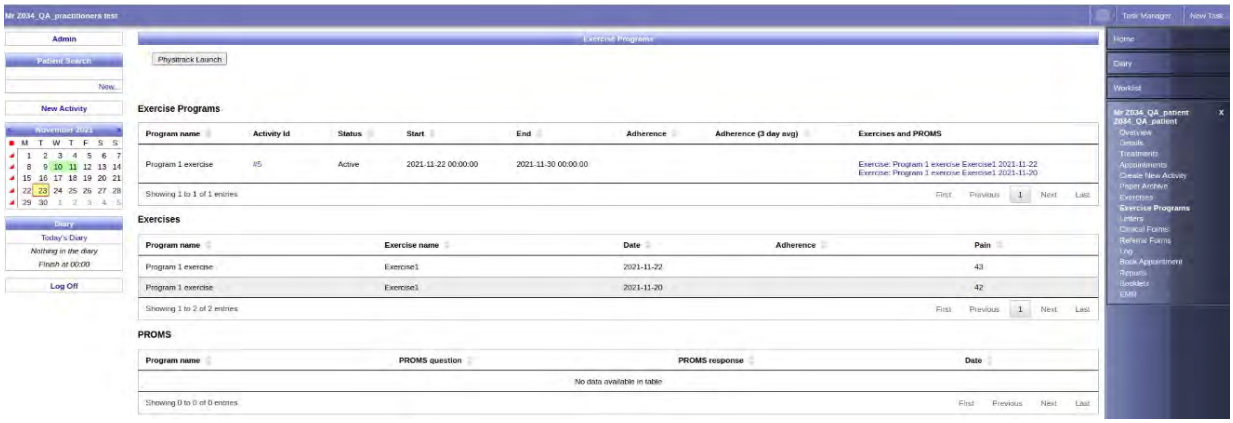
Physitrack is a system that enables users to create exercise programmes for patients, and track each patient's engagement and outcomes. If your organization has the Physitrack integration, practitioners and other users can view information from Physitrack.

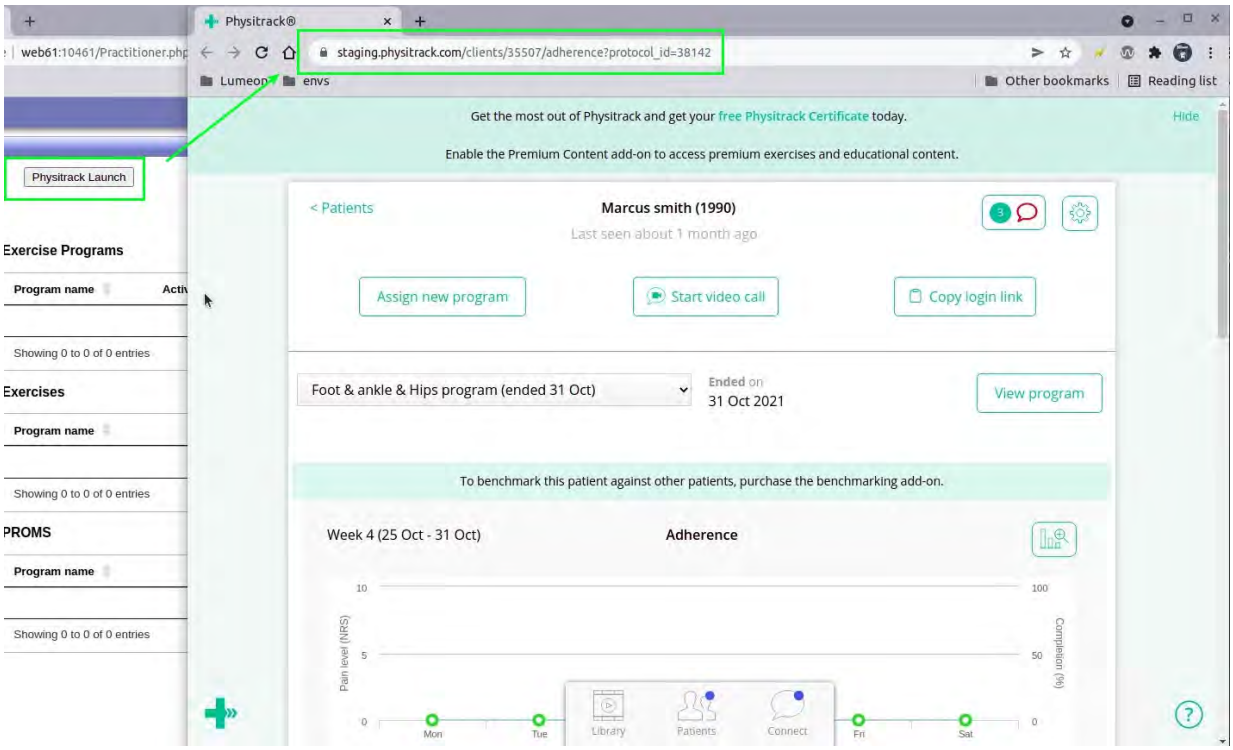
Practitioners can open a Physitrack session from within a patient's EMR page. If the patient does not already exist in Physitrack, Conductor creates a record using the patient's EMR information. Then, as a patient works on exercises and programmes set up in Physitrack, the following information is passed to Conductor:

- Exercise programme length
- Programme last access date/time
- Exercise pain levels
- Programme/exercise adherence
- Patient reported outcome measures (***PROMs***)

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To view Physitrack information for a patient, click the **Physitrack Launch** button on the **Exercise Programmes** page of a patient's EMR. The text on the button to launch Physitrack is defined in Conductor's core configuration.





Conductor's pathways can access Physitrack data and use the values to drive pathway logic. For example, a pathway could use high pain levels or low adherence to trigger an action and/or notify the practitioner. Also, a pathway could check for patient PROMs completion in Physitrack and prompt the patient if not completed.

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Security points

System administrators and Lumeon Support have access to security point settings which can enable or disable visibility of Conductor functionality for other users.

The following security points control access to EMR functionality:

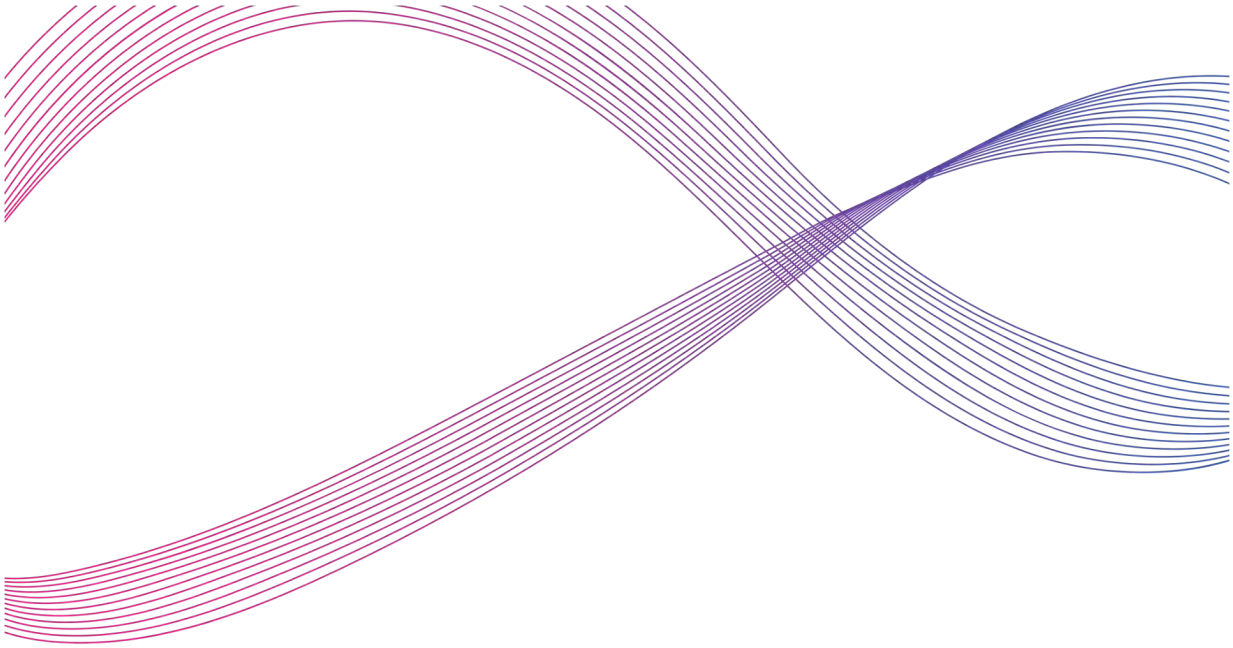
Security point	Description
Admin.EMR	**Can View** - Controls access to the EMR journal.
EMR.AddTab	**Can View** - Controls the ability to create ad hoc appointments from the EMR.
EMR.DiagnosticForm	**Can View** - Controls access to the files uploaded to "File Upload" type questions on forms or in the EMR.
Forms.Default	**Can View** - Controls access to the **Forms & EMR** menu.
Forms.EMR	**Can View** - Controls access to the **EMR** option in the **Forms & EMR** menu.
Forms.Questions	**Can View** - Controls access to the **Questions** option in the **Forms & EMR** menu.
Patient.CancelPrescriptions	**Can View** - Controls the ability to unprescribe a prescription. This is only possible up to 2 hours after an item has been prescribed.
Patient.EMR	**Can View** - Controls access to the **EMR** option in the **Overview** menu in the patient details page, and the **EMR** page and **Journal** page. **Can Add** - Controls whether the user can add journal entries. **Can Edit** - Controls whether the user can unlock or amend journal entries. **Can Cancel** - Controls whether the user can delete journal entries.
Patient.Medications	**Can View** - Enables a user to view medications on a patient's **Prescriptions** page. Also requires `Patient.Prescriptions`. **Can Add** - Enables a user to add medication.
Patient.PrescriptionPrint	**Can View** - Controls whether a user can print a patient's prescription. Also requires `Patient.Prescriptions`.
Patient.Prescriptions	**Can View** - Controls access to the **Prescription** option in the patient's account and the **Prescriptions** page.
Products.VerifyPrescription	**Can View** - Controls access to the **Verify Prescription** option in the **Products** menu and the **Verify Prescription** page.

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Glossary

Physitrack	Physitrack is a system that enables practitioners to create exercise programmes for patients, and track each patient's engagement and outcomes. See *https://www.physitrack.co.uk/features* for more information.
PROMs (Patient recorded outcome measures)	A patient's responses to questionnaires where they record their health status before and after treatment. See *digital.nhs.uk* and *https://www.england.nhs.uk/statistics/statistical-work-areas/proms/* for more information.
Read Codes	A thesaurus of clinical terms. Superseded by ***SNOMED CT***. See *https://digital.nhs.uk/services/terminology-and-classifications/read-codes* for more information.
SafeScript	An international set of databases providing information about drugs, such as ingredients, side effects, contraindications, and use in pregnancy. See *https://www.safescript.com/*.
SNOMED CT	An electronic database of international clinical terminology. See *https://www.snomed.org/snomed-ct/five-step-briefing* and *https://digital.nhs.uk/services/terminology-and-classifications/snomed-ct* for more information.

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Forms in Lumeon Conductor 24.2

Issued by: Lumeon Learning
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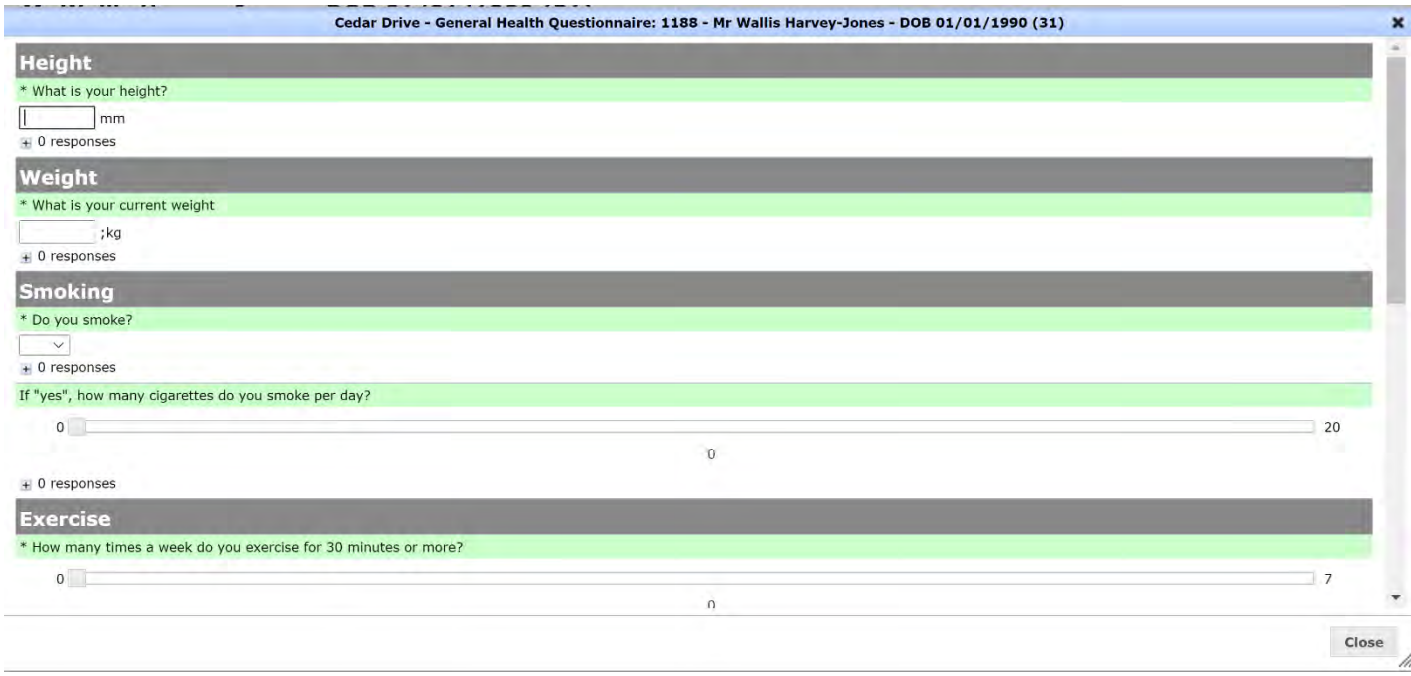
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Introduction

Forms in Lumeon Conductor are electronic. Your organization can use electronic forms to gather information that is either clinical or non-clinical in nature. They are accessible to practitioners and administrative staff. Forms can be made accessible to patients enabling them to complete them independently.

There are several types of forms in Conductor:

- **Clinical forms** - Capture clinical information about patients.
- **Feedback forms** - Capture patient opinions, recommendations, and feedback.
- **Site audit forms** - Capture site-related information that can be used for reporting.



Forms functionality

To create a new form, first you must create the questions that you want to use in the form.

You can use questions across a range of forms and EMR pages.

You can set up a form so that, each time it is completed, previously received responses are saved.

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Create questions

When you build a form, a list of questions is not available. Instead you use the **Question Search** to find the questions you want to include in the form. Therefore, Lumeon recommends that you use a naming convention when you create questions to ensure that they are easy to find when you build the form. For example, you may want to prefix questions with the type of form, the location, or specialty where the form will be used, or the practitioner who will use the form.

You can use questions in templates for the following types of form:

- Clinical forms
- Feedback forms
- Room forms
- Round audit forms

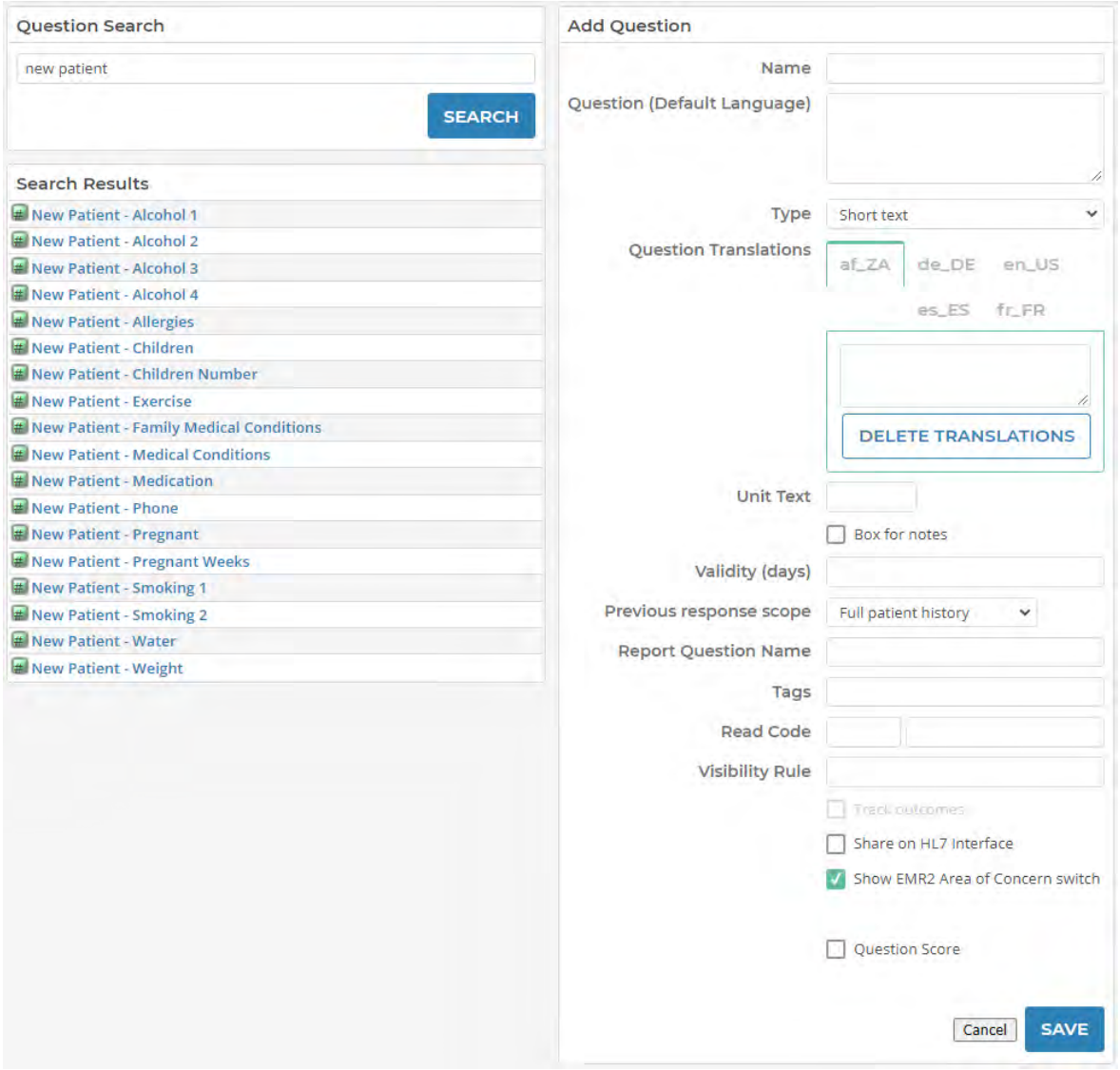
They can also be used in EMR pages.

To create questions to be used in a form or an EMR page:

1. Select **Questions** in the **Forms & EMR** menu. The **Question Search** displays on the left and the **Add Question** form displays on the right.

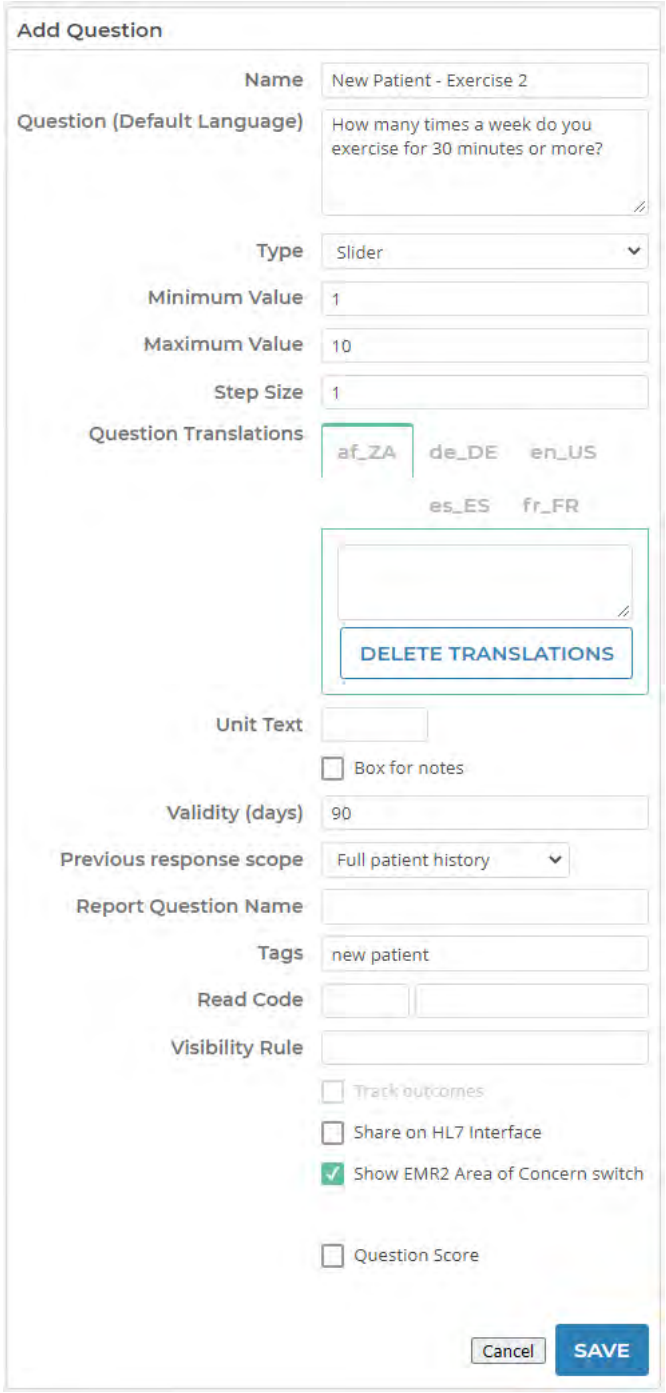
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2. To see if a question already exists, enter a key word in the **Question Search** field on the left and click **Search**.



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3. To create a new question, complete the **Add Question** form using the table below, and click **Save**.



4. Continue to add the questions that you want to include in the new form.

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Question fields

Complete the question details using the following table. Other fields may display depending on the **Type** you select.

Field name	Description
Name	Enter a name for the question. For example, **Number of units of alcohol per week**. You can use this name, along with tags, to search for the question. Since it is not possible to see a list of created questions, we recommend that a naming convention is used either in the question name or in the tag so that you can easily search for questions. This name is also displayed if the question and response are displayed on the overview page.
Question (Default Language)	Enter the actual wording of the question that is visible to the practitioner. For example, **How many units of alcohol do you drink a week?**.
Type	Specify the question response type you require, for example, **Short text**, **Yes or no**, or **Multiple choice**. Please note, barcodes can be scanned into any text input field. For multiple choice, enter the different choices one under another. See *Appendix 1 - Question types (page 54)* for the available question types.
Minimum Value	For **Whole Number** questions, enter the minimum number required in the answer. This is optional.
Maximum Value	For **Whole Number** questions, enter the maximum number required in the answer. This is optional.
Question Translations	Enter translations for the question text. You can enter a translation for all the languages available in your organization.
Unit Text	Unit text for the answer. For example, **cm**, **kg**, **hours**. This displays after the field.
Box for notes	Select this check box to create a box for notes which can be displayed either underneath a question or to the side, depending on the layout type.
Validity (Days)	Set the period that the answer is valid for. Options are: · **Leave blank** - The previous response prepopulates the answer field when a new form or EMR page is created using the same question. For example, use this when creating a question to record a patient's height because their height is unlikely to change. · **Enter 0** - No response displays in the answer field when a new form or EMR page is created using the same question. For example, use this then when creating a question to record a patient's weight because this may be different every time a form is completed for that patient. · **Enter a number** - The last response appears in the answer field for that many days when a new form or EMR page is created using the same question.
Previous response scope	Select which responses are displayed when viewing that question in other forms or EMR pages.  Options are: · **Full patient history** – All previous responses are displayed under the question. · **Same referral only** – Only shows responses to questions in forms linked to that referral. · **Same appointment only** – Only shows responses to questions filled in for that particular appointment. These responses are visible to all practitioners looking at the patient's EMR.
Report Question Name	Name of the merge field in the clinical report if EMR2 is configured.

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Field name	Description
Tags	Tags are useful for producing EMR2 reports or looking for questions. **Question Search** can look up the question name or the tag. For example, all questions relating to height could be tagged **height**.
Read Code	Enter a read code which is saved in the database and can be used when generating custom reports.
Visibility Rule	
Track outcomes	Enables reports to track outcomes. This can be used with number, height, or weight question types to create a graph of responses.
Share on HL7 Interface	Select this to share with HL7, and enter the **Order Interface Name**.
Show EMR2 Area of Concern Switch	Informs whether the questions displays on the EMR2 Area of Concern switch.
Question Score	Enables scoring for different responses to this question - see *Form scoring (page 38)*.

Question versioning

Every time a question is changed, a new version is created. This means that forms added to a patient account prior to the changes continue to use the version of the question that was current when they were created.

Newly created forms use the latest version of the questions. You do not need to reactivate the form template if only the question content is changed. You must only reactivate the form template if the questions, including ordering, have changed.

If a patient responds to a question which has had its wording changed since the last time they filled out the form, the history of question responses highlights the fact that the question was previously worded differently.

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Build forms

To create a clinical or feedback form, select **Form Templates** in the **Pathway Logic** or **Forms & EMR** menus.

On this page, you can create a new form or edit a pre-existing one. You must create all the questions before building the form.

The **Form Templates** page is divided into several sections, enabling you to view and create:

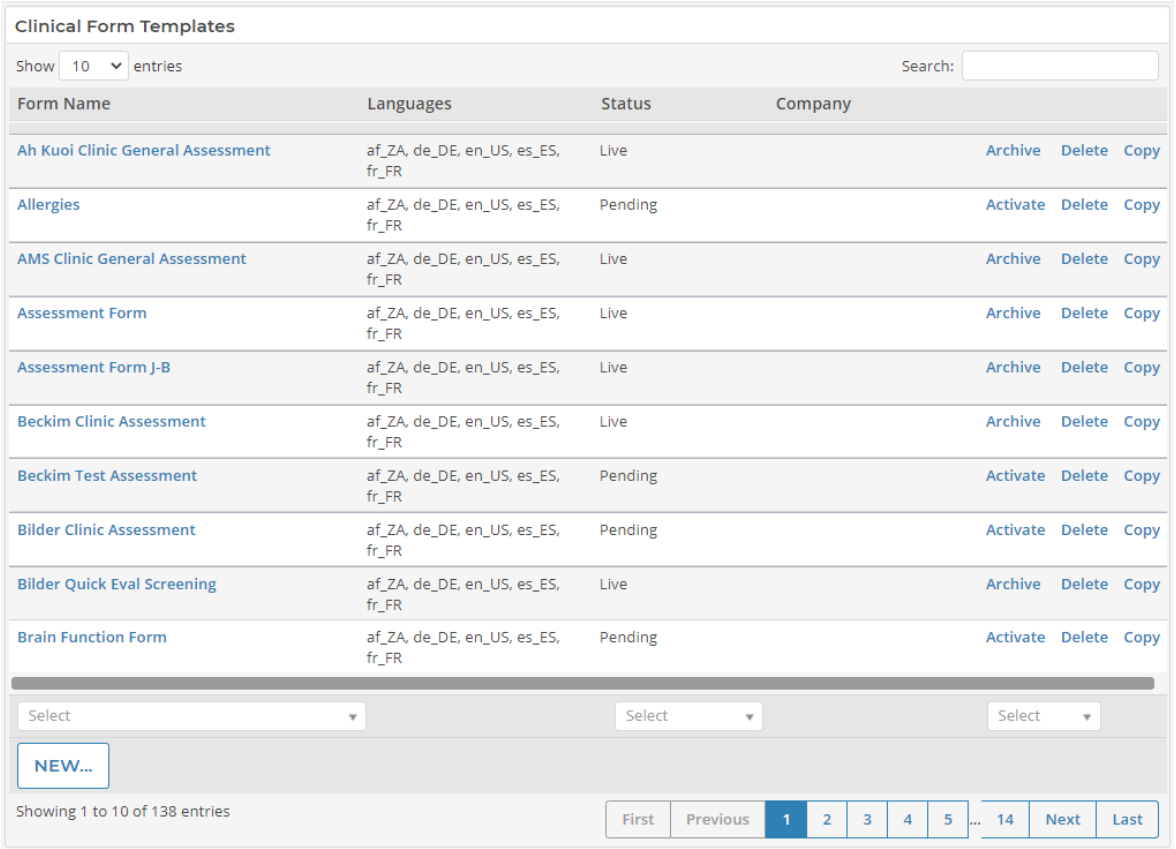
- Clinical form templates - see *Clinical forms (page 10)*.
- Feedback form templates - see *Feedback forms (page 20)*.
- Room form templates - see *Site audit forms (page 31)*.
- Round audit form templates - see *Round audit forms (page 22)*.

Clinical forms

Create a clinical form

To create a new clinical form:

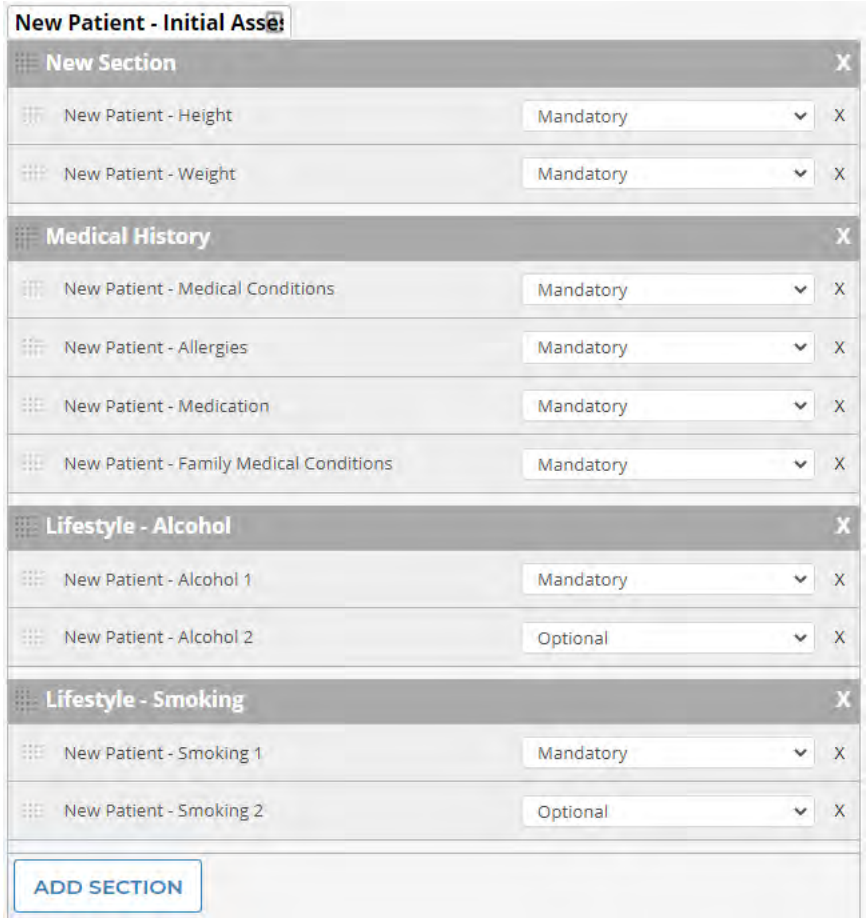
1. On the **Form Templates** page, click **New...** below the table of existing forms in the **Clinical Form Templates** section.



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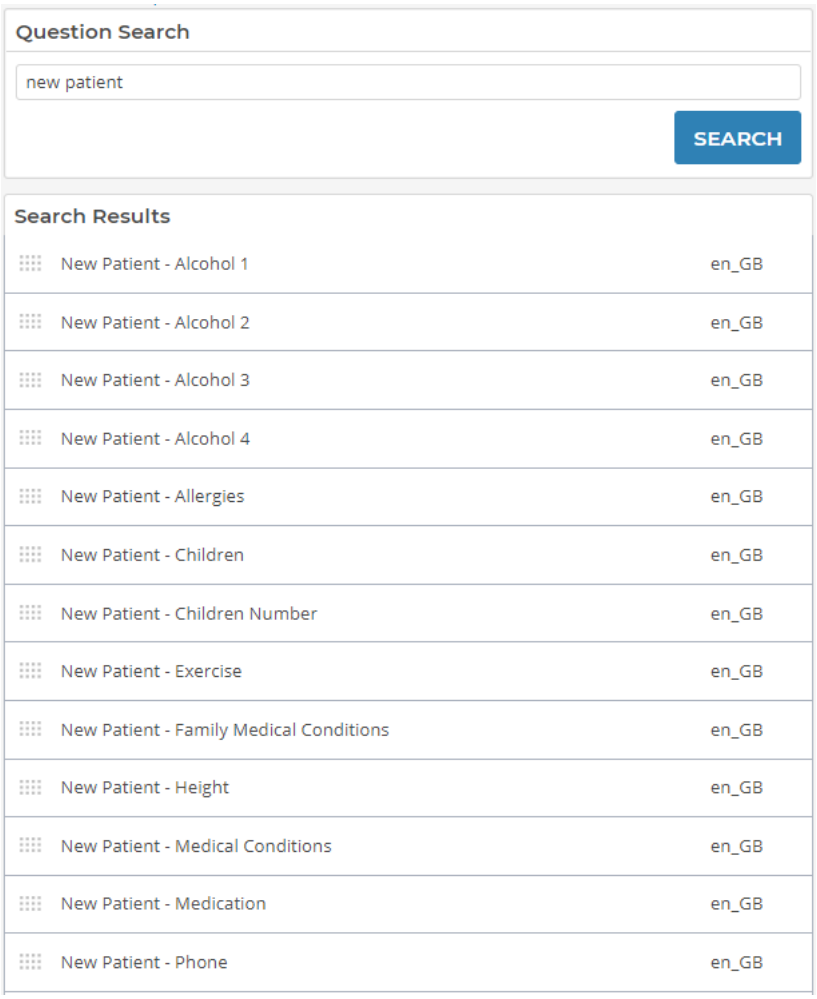
2. Enter the name of the form in the **New Form** field on the right and press **Tab**.

3. Click **Add Section**, enter the section name, and press **Enter**, to create a new section in the form.



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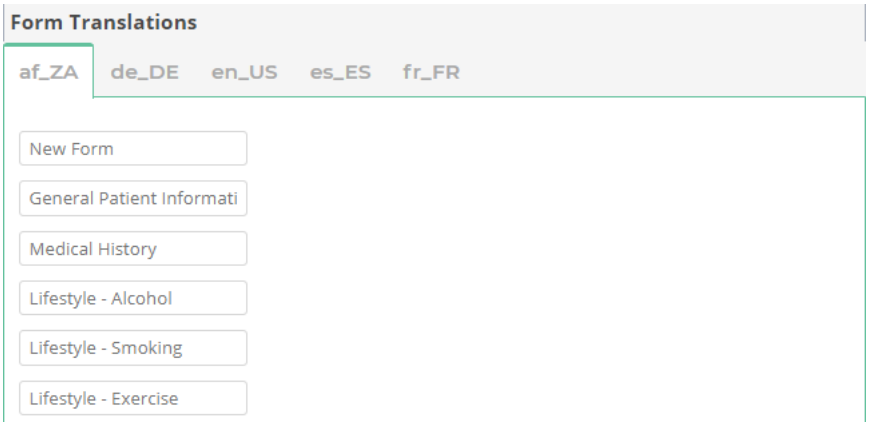
4. In the **Question Search** section, enter key words from the question that you want to add to the form and click **Search**. Once you have found the right question, click on the block of dots to the left of the question and drag it to the newly created section on the right.



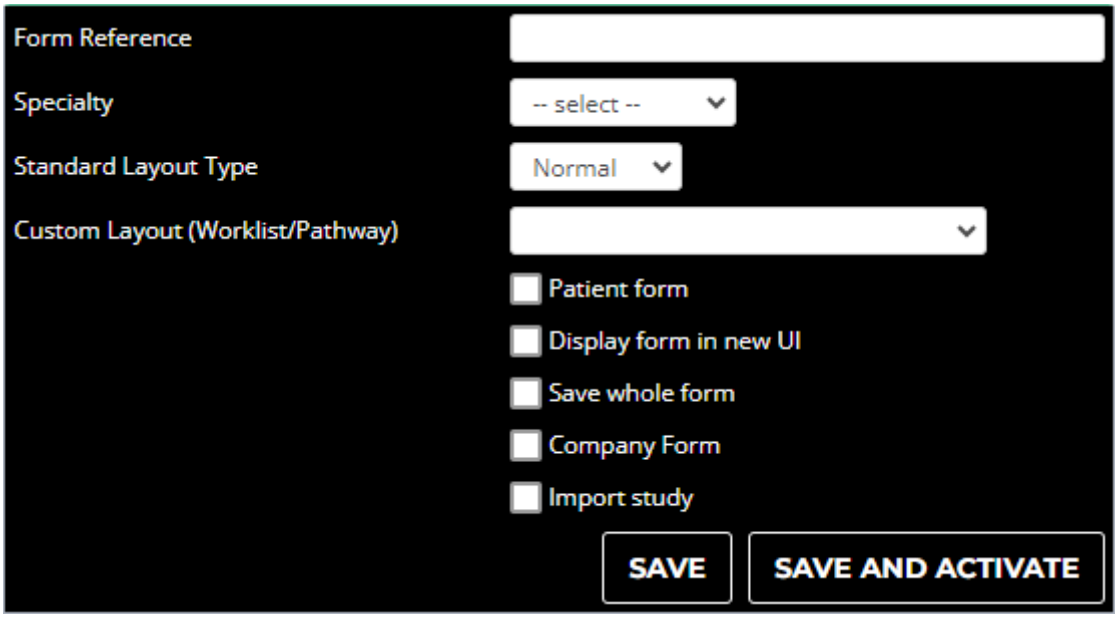
5. Select the option in the drop-down list to the right of each question to determine whether or not users must respond to that question:
   - **Optional** - Users are not obliged to respond to the question.
   - **Mandatory** - Users must respond to the question.
   - **Mandatory, allow reason for no result** - Mandatory, but a reason can be supplied if no result is given.
6. Add conditions for the questions as necessary. Conditions are available for clinical form templates only. See *Use question conditions in clinical forms (page 14)*.
7. Continue to add new sections, questions, and conditions, until the form is complete.

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8. If multiple languages are configured for your organization, you can select the tab for the required language variant, then enter the translated text for the form title and section headers for the language(s).



9. Complete the options for the clinical form in the black box below the **Form Translations** section, using the fields in the table below. See *Clinical form options (page 20)*.



10. Click **Save** if you do not want to make the form available for patients yet or you want to make further changes to the form later. Its status is marked as **Pending**. You can activate the form later by clicking **Activate** in the row of the **Round Audit Form Templates** table to change the form from **Pending** to **Live**.

11. Click **Save and Activate** if you want to make the form active now so that you can immediately send it to patients.

12. If the form is to be emailed to patients, ensure that you include the form link merge tag `<<form_link>>` in the email template.

If the form is live, it is now available for:

- Linking to appointment types.
- Manual generation by administrators or practitioners on a patient record.
- Linking to email templates for distribution to patients.

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If you edit an existing form, you can click **Save and Activate** to save the form and activate it immediately. If you click **Save** after editing an existing form, the form has a status of **Pending**. When you are ready to make the form active, you can click **Activate** next to the form name in the table of forms to change it from **Pending** to **Active**.

Use question conditions in clinical forms

If the form is a patient form and is to be displayed in Conductor's enhanced UI, you can use conditions to display or hide further questions which the patient or practitioner should complete. For example, if a patient replies **No** to whether they smoke, you do not need to display a question asking how many cigarettes a day they smoke. Another example is, if a patient has a long-term condition such as Type 2 diabetes, you may want to ask further questions about their diet and lifestyle.

Rules for displaying or hiding a question can use:

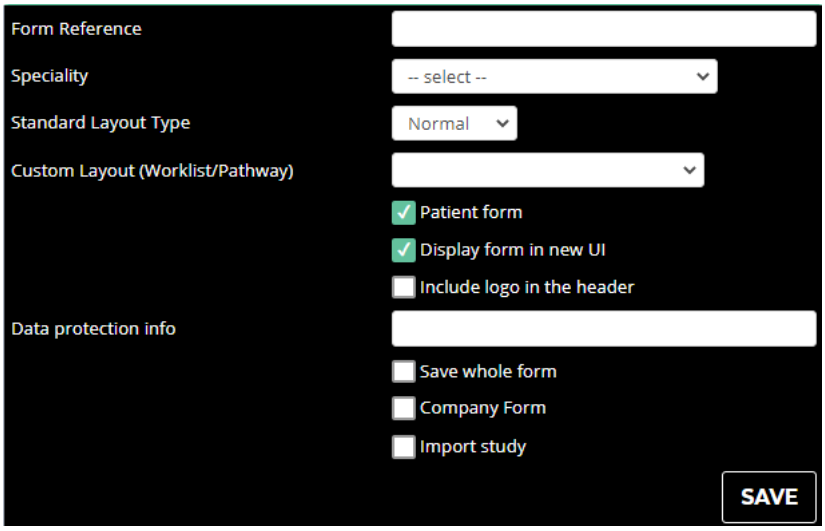
- Responses to earlier questions in the form.
- Twig-based logic and patient demographics, such as age and gender.

The option to display or hide questions is only available in clinical form templates and audit form templates.

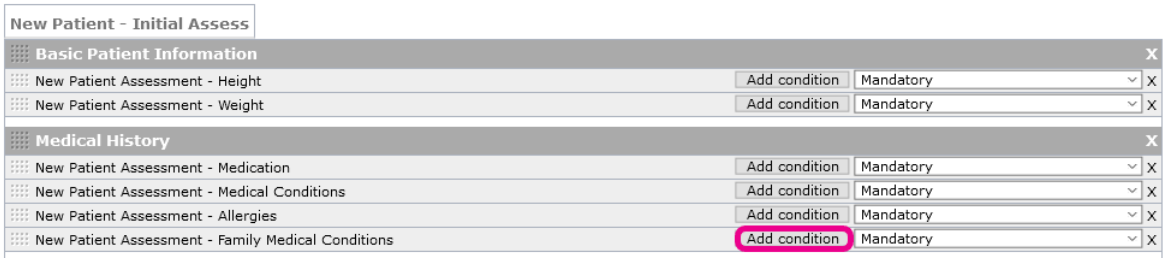
Add a condition

A condition can consist of one or many condition lines. To add a condition:

1. In the clinical form options, select **Patient form** and **Display form in new UI** to display the **Add Condition** button for all questions.

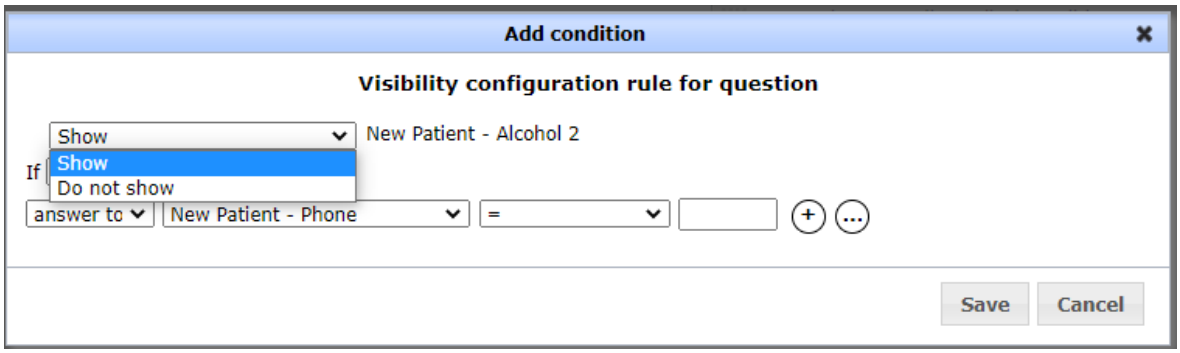


2. In the form, click **Add condition** in the appropriate question:

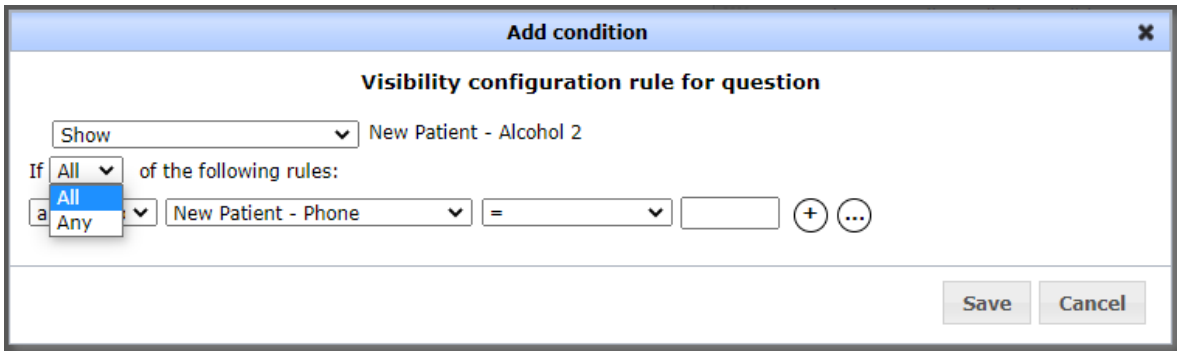


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3. Select **Show** in the drop-down list to show the selected question on the form if the conditions are met, or select **Do not show** to hide the selected question if the conditions are met:



4. If you are entering multiple condition lines, use **Any** if any one or more of the conditions can be met or use **All** if all the conditions must be met:



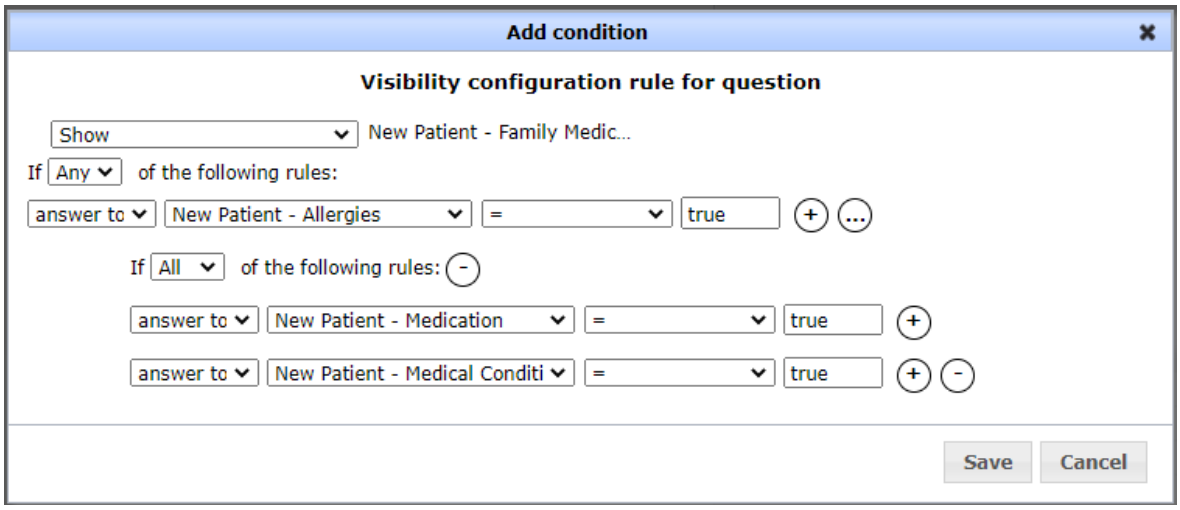
5. Enter the condition line that you want. You can:
   - *Use responses to earlier questions in a condition* *(page 16)*
   - *Use patient demographics in a condition* *(page 17)*

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6. You can create more complex conditions by grouping or nesting condition lines together. If you want to add more condition lines:
   - Click **+** if you want to add another condition line at the same level.
   - Click **...** if you want to add a condition at a lower level of nesting. You can use one level of nesting.

   If you no longer want a condition line that you have entered, click **-** to delete it.

   For example, to display the question "New Patient - Family Medical Conditions" if the question "New Patient - Allergies" is true OR if both the questions "New Patient - Medication" AND "New Patient - Medical Conditions" are true, the whole condition would be:

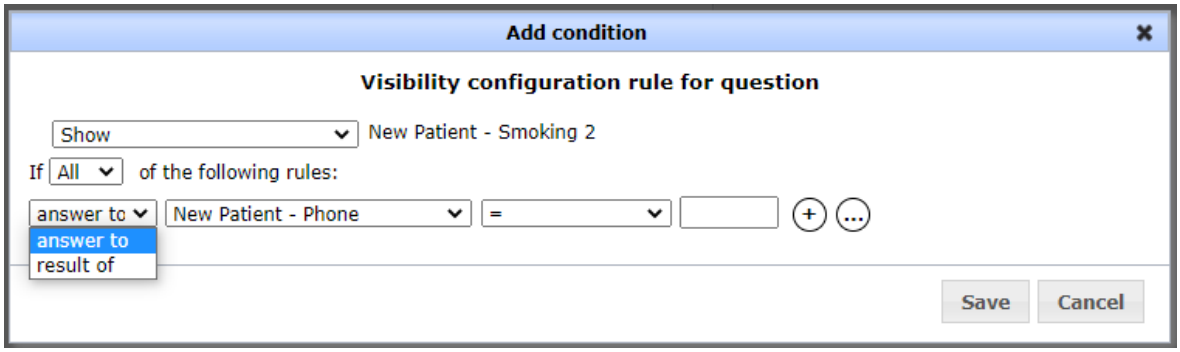


7. When you have completed the condition, click **Save**.

Use responses to earlier questions in a condition

To use responses to earlier questions:

1. Ensure the drop-down list in the first field of the condition is **answer to**:

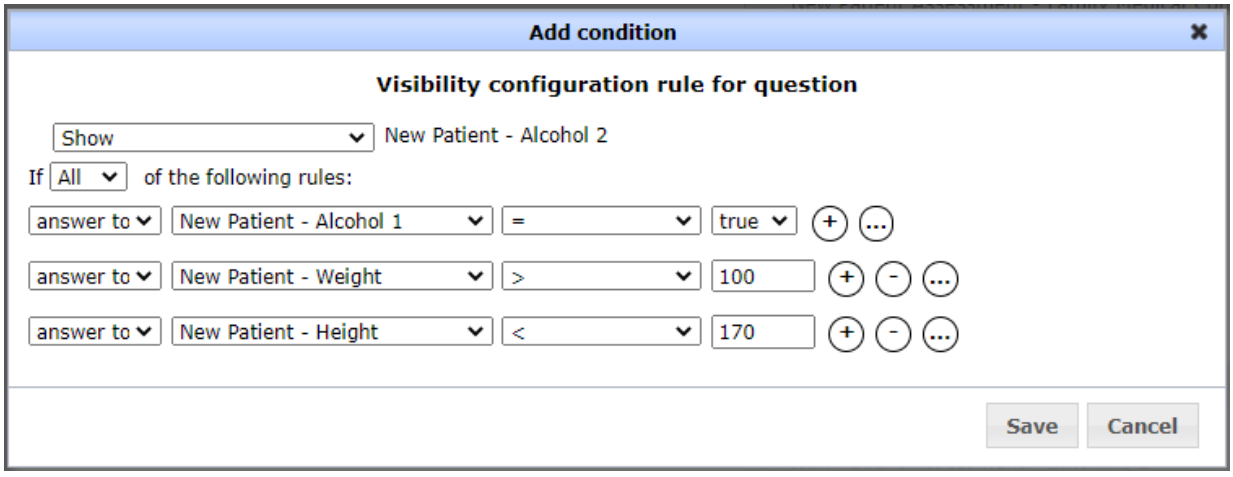


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2. Select the question that you want to use. You can use responses to the following question types in conditions:
   - Number
   - Whole number
   - Height
   - Weight
   - Multiple choice - a single or multiple answers
   - Multiple choice (checkboxes) - a single or multiple answers
   - Yes or no
3. Select the operator you want to use. For example, if you want to show the question to patients over a certain weight, this might be **>** or **>=**.
4. Enter the value you want to use. For example, if you are using weight, this might be `100` (kg) or `200` (lbs).

In the following example, the "New Patient - Alcohol 2" question is only displayed if all of the following three conditions are met:

- The answer to the "Alcohol 1 question" is true, and
- In the "New Patient - Weight" question, the patient entered a weight that is greater than 100 kg, and
- In the "New Patient - Height" question, the patient entered a height that is less than 170 cm.



Use patient demographics in a condition

You can use Twig-based logic and patient demographics, such as age and gender, in a condition. For example, you can ask only female patients if they are pregnant, or ask for a parent's telephone number if the patient is under 18.

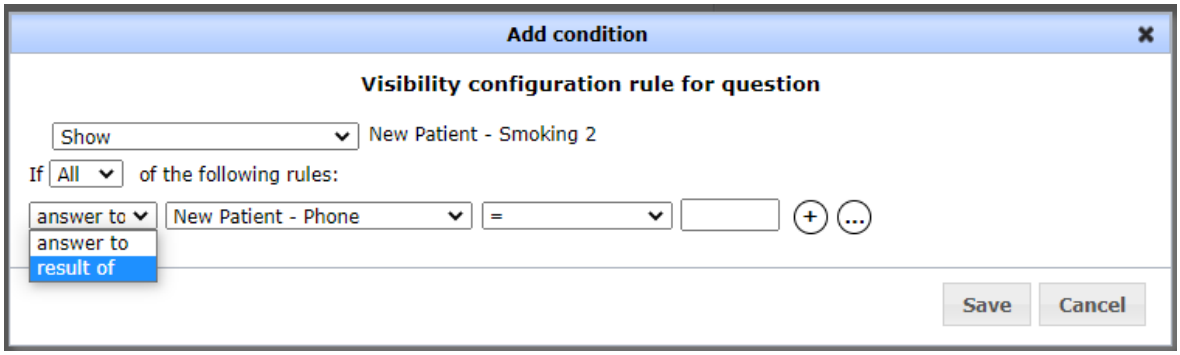
You can enter a Twig-based condition or you can use a pathway rule that already exists. The answer to the Twig-based condition or pathway rule must be `true` or `false`.

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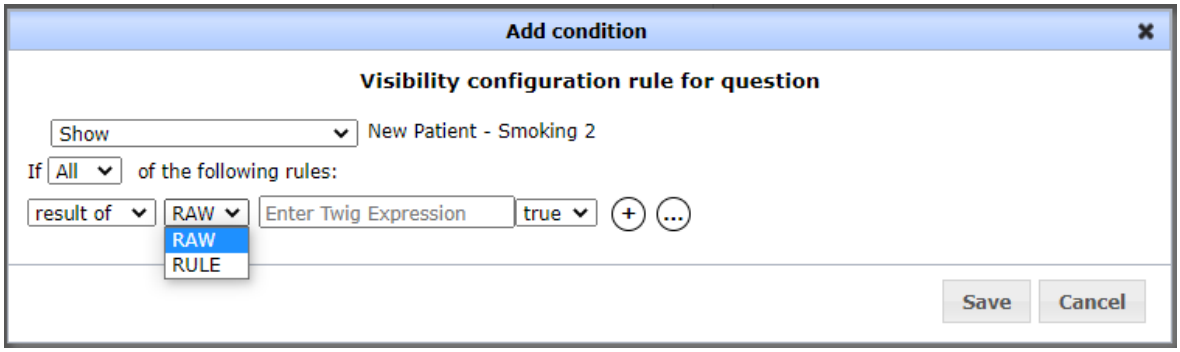
Twig-based condition

To enter a Twig-based condition:

1. Select **result of** in the drop-down list in the first field of the condition:



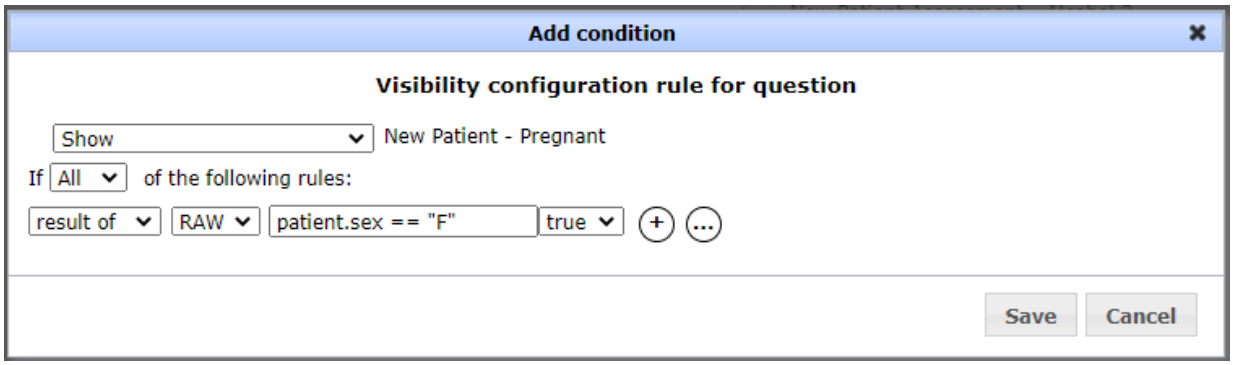
2. Ensure that the second field is **RAW**:



3. Enter the Twig-based condition that you want to use. For example, `patient.sex == "F"`.

4. Select whether you want the condition to be `true` or `false`.

In this example of a Twig expression, the "New Patient - Pregnant" question is only displayed if the patient is female:

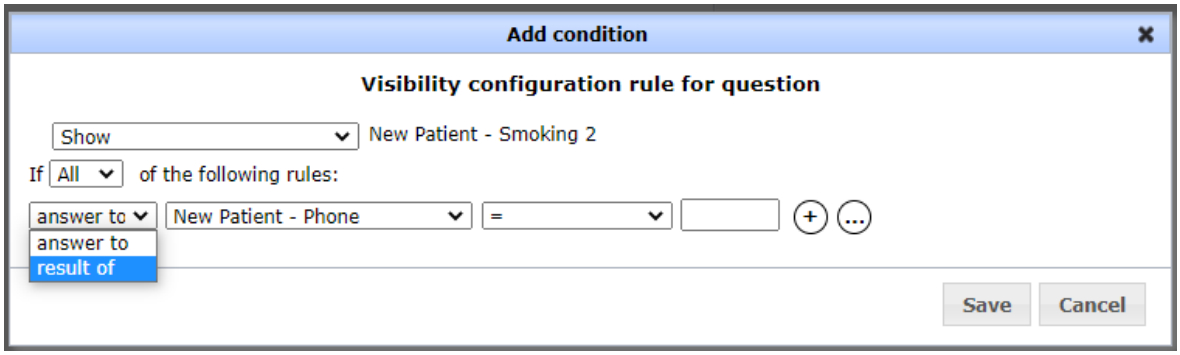


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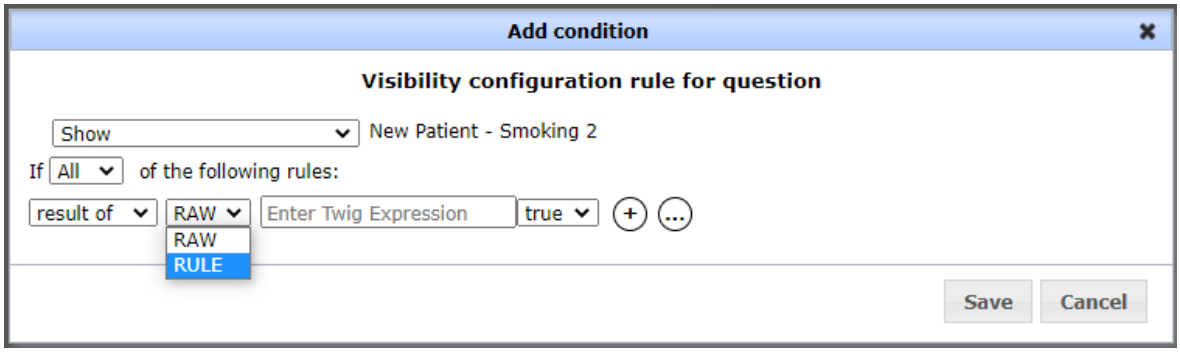
Pathway rule condition

To use a pathway rule in a condition:

1. Select **result of** in the drop-down list in the first field of the condition:



2. Select **RULE** in the second field:

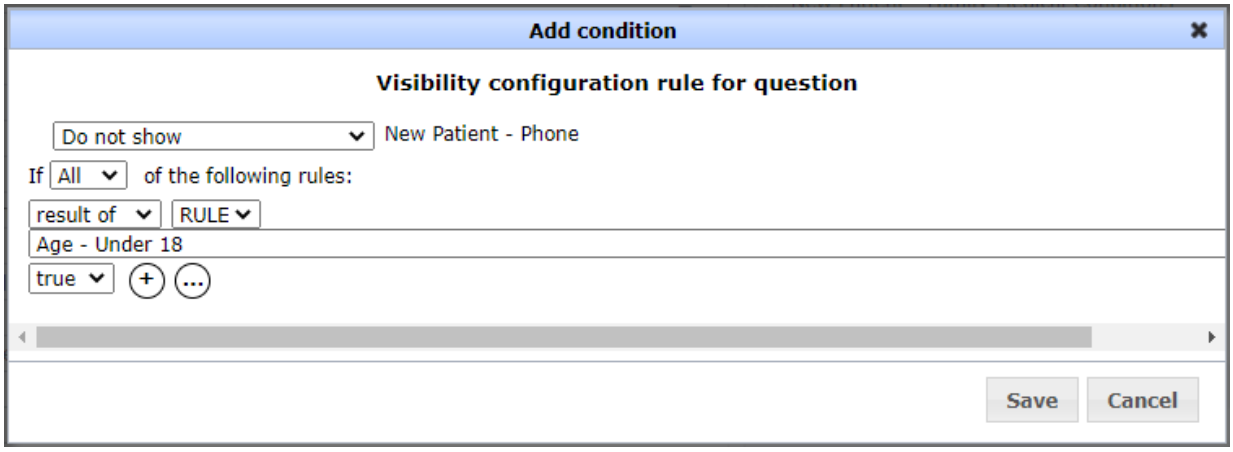


   A drop-down list of all the rules is displayed.

3. Select the appropriate rule from the drop-down list. For example, `Age - Under 18`.

4. Select whether you want the pathway rule to be `true` or `false`.

In this example of a pathway rule, the "New Patient - Phone" question is not displayed if the patient is under 18 years old:

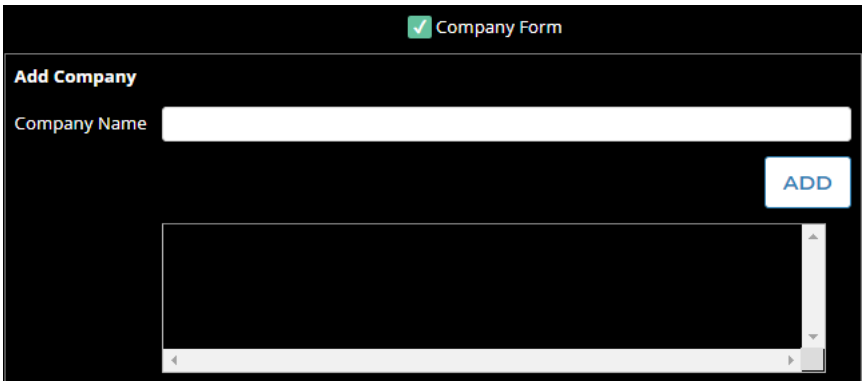


The pathway rule "Age - Under 18" was created in **Pathway Rules** in the **Pathways** menu.

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Clinical form options

Complete the clinical form options using the following table:

Field name	Description
Form Reference	Enter a reference that can be given to employees of a company who are not registered with Conductor but need to complete a clinical form during their enrolment process. In some instances, the same field is used to tell the iPad app if it needs to display a form or not.
Specialty	Select a specialty from the drop-down list. Only required if a particular configuration setting for anonymous pre-employment pages has been enabled.
Standard Layout Type	Select the required layout from the drop-down list: · **Normal** - Displays questions with notes (where applicable) underneath. · **Columns** - Displays notes (where applicable) adjacent to questions.
Custom Layout (Worklist/ Pathway)	You can select a custom layout if they have been created - see *Custom form layouts (page 45)*.
Patient form	Select to enable a patient to fill in the form prior to their appointment. Selecting this check box displays a **Data protection info** field. Enter a URL link to direct a company's employees to a website page with its data protection information.
Display form in new UI	Select if you want the form to display in Conductor's enhanced UI.
Include logo in header	Select if you want to include the company logo in the form header.
Save whole form	Select to add an **OK** button at the bottom of the form which saves the whole form. If you do not select **Save whole form**, the form has individual **Save Section** buttons at the end of each section.
Company Form	Select if this is a form that is available to patients who are linked to a specific company. Selecting this check box enables you to add the names of the company or companies that this form is available for.  See *Company forms (page 36)*.
Import study	

Feedback forms

Patient feedback forms can be emailed to a patient when appointments or classes are completed. Feedback forms can be anonymous or not depending on the requirements of the form, and you can specify this on each form you create.

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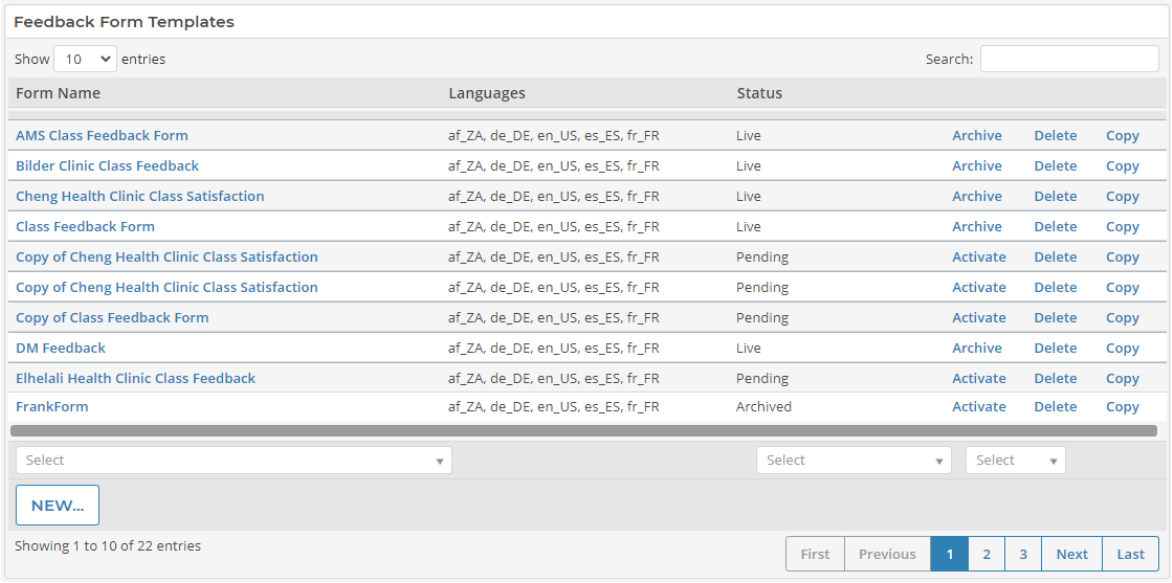
The delivery of a feedback form is triggered when an administrator or practitioner clicks **L** within the appointment tracker in a diary or via a worklist. Feedback forms are only applicable to certain appointment types where a form has been explicitly linked to the appointment.



Create a feedback form

To create a feedback form:

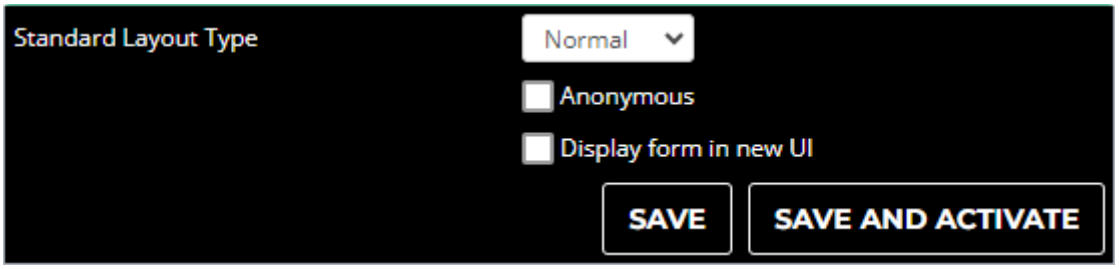
1. On the **Form Templates** page, click **New...** below the table of existing forms in the **Feedback Form Templates** section.



2. Follow the same process as creating a clinical form to build the form by creating sections and selecting questions. See *Create a clinical form (page 10)*.

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3. Complete the options for the feedback form in the black box below the **Form Translations** section, using the fields in the table below. See *Feedback form options (page 22)*.



4. Click **Save** if you do not want to make the form available for patients yet or you want to make further changes to the form later. Its status is marked as **Pending**. You can activate the form later by clicking **Activate** in the row of the **Round Audit Form Templates** table to change the form from **Pending** to **Live**.

5. Click **Save and Activate** if you want to make the form active now so that you can immediately send it to patients.

6. The corresponding email sent to the patient is an **Appointment Feedback** or **Class Feedback** email. If the form is to be emailed to patients, ensure that you include the form link merge tag `<<feedback_form_link>>` in the email template.

If you edit an existing form, you can click **Save and Activate** to save the form and activate it immediately. If you click **Save** after editing an existing form, the form has a status of **Pending**. When you are ready to make the form active, you can click **Activate** next to the form name in the table of forms to change it from **Pending** to **Active**.

Feedback form options

Complete the feedback form options using the following table.

Field name	Description
Standard Layout Type	Select the required layout from the drop-down list: · **Normal** - Displays questions with notes (where applicable) underneath. · **Columns** - Displays notes (where applicable) adjacent to questions.
Anonymous	Select if you want the completed feedback forms to be anonymous.
Display form in new UI	Select if you want the form to display in Conductor's enhanced UI.

Round audit forms

These forms enable a round auditor to complete a round audit digitally. The advantages of digitizing the round audit process are:

- Enabling a centralized team to review round audit forms quickly.
- Ability to start a round audit which displays the round audit form.
- Ability to view past round audit forms.

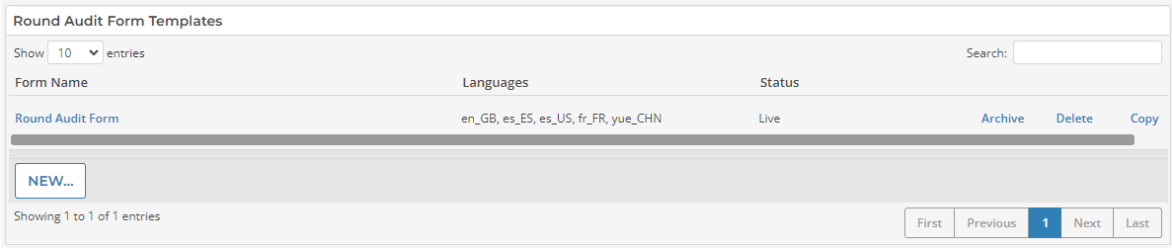
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Create digital round audit forms

You can create an audit patient form only, an audit round form only, or both.

To create a new digital round audit form:

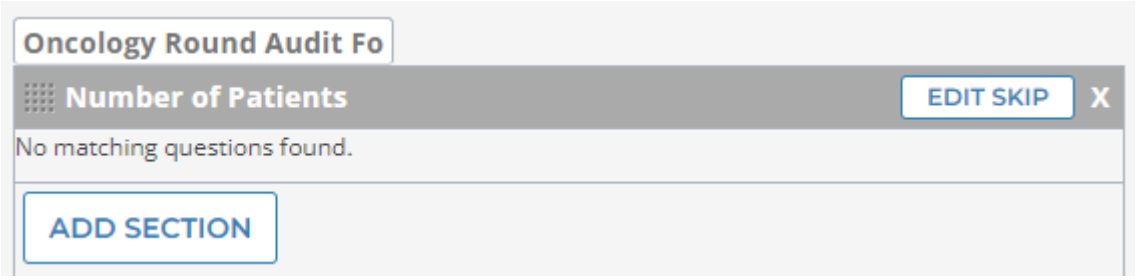
1. On the **Form Templates** page, click **New...** below the table of existing forms in the **Round Audit Form Templates** section.



   The **Form Builder** page displays.

2. Enter the name of the form in the **New Form** field on the right and press **Tab**.

3. Click **Add Section**, enter the section name, and press **Enter**, to create a section within the form. If you want to add a question that displays the number of patients in the round, we suggest including this in the first section of the round audit form.

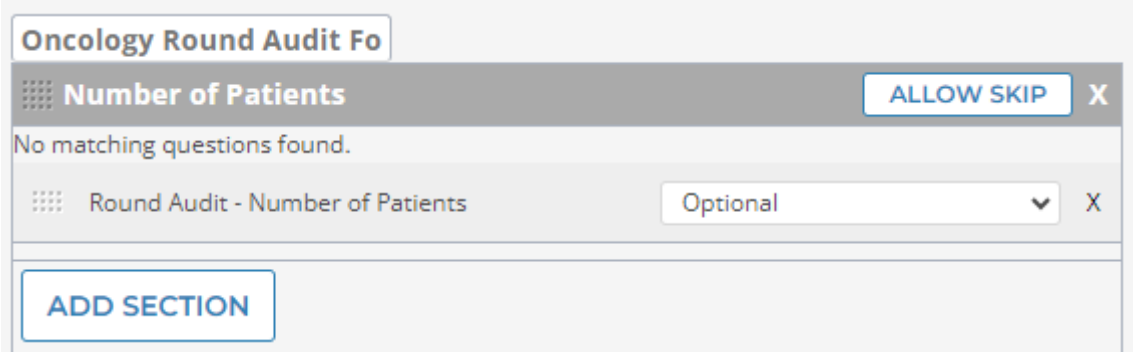


4. In the **Question Search** section, enter key words or tags from the question that you want to add to the form and click **Search**. Conductor displays all the questions with names or tags that match the key words.



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5. Once you have found the right question, click on the block of dots to the left of the question and drag it to the newly created section on the right. If the first section contains the question that displays the number of patients in the round, find the question that has **Patient round count** in the **Tags** field.



6. Select the option in the drop-down list to the right of each question to determine whether or not round auditors must respond to that question:
   - **Optional** - Round auditors do not have to respond to the question.
   - **Mandatory** - Round auditors must respond to the question.
   - **Mandatory, allow reason for no result** - Mandatory, but round auditors can provide a reason if they do not respond.

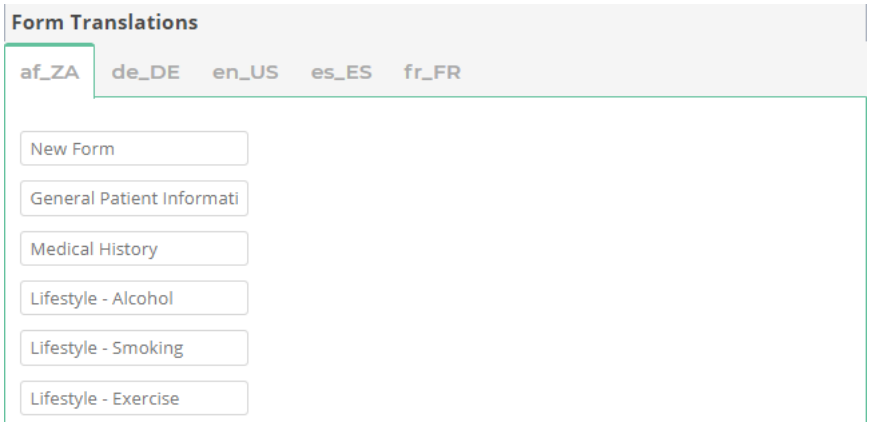
7. When creating the patient round audit form, we recommend that you enable skipping for all sections in the form so that the round auditor does not have to complete a form for every patient. To do this, click **Allow Skip** in the section name. The **Add Skip Section** window appears. Select the **Enable section skip** checkbox so that the round auditor can skip this section. You can also change the name of the section skip button that appears on the round audit form. Click **Save**. The **Allow Skip** button has now changed to **Edit Skip**.



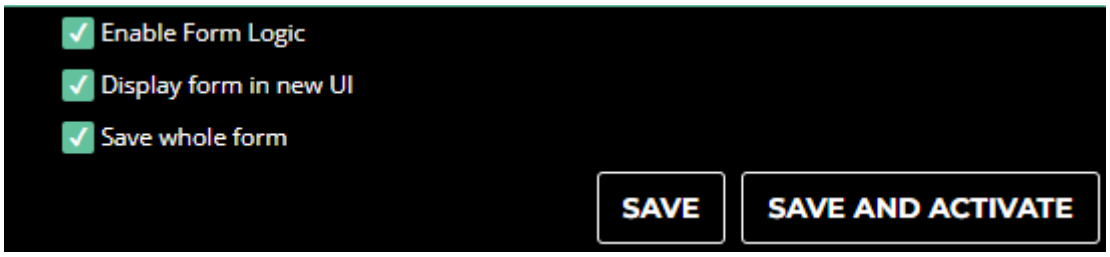
8. Continue to add new sections and questions until the form is complete.

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9. If multiple languages are configured for your organization, you can select the tab for the required language variant, then enter the translated text for the form title and section headers for the language(s).



10. Complete the options for the form in the black box below the **Form Translations** section, using the fields in the table below. See *Round audit form options (page 31)*.



11. Click **Save** if you do not want to make the form available for digital round audits yet or you want to make further changes to the form later. Its status is marked as **Pending**. You can activate the form later by clicking **Activate** in the row of the **Round Audit Form Templates** table to change the form from **Pending** to **Live**.

12. Click **Save and Activate** if you want to make the form active now so that you can include it in a digital round.

The form is now available for including in a digital round template.

If you edit an existing form, you can click **Save and Activate** to save the form and activate it immediately. If you click **Save** after editing an existing form, the form has a status of **Pending**. When you are ready to make the form active, you can click **Activate** next to the form name in the table of forms to change it from **Pending** to **Active**.

Use question conditions in round audit forms

If the form is to be displayed in Conductor's enhanced UI, you can use conditions to display or hide further questions which the round auditor should complete. For example, if the round auditor replies **No** to whether the patient was seen during the round, you do not need to display any further questions about that patient.

Rules for displaying or hiding a question can use:

- Responses to earlier questions in the form.
- Twig-based logic and patient demographics, such as age and gender.

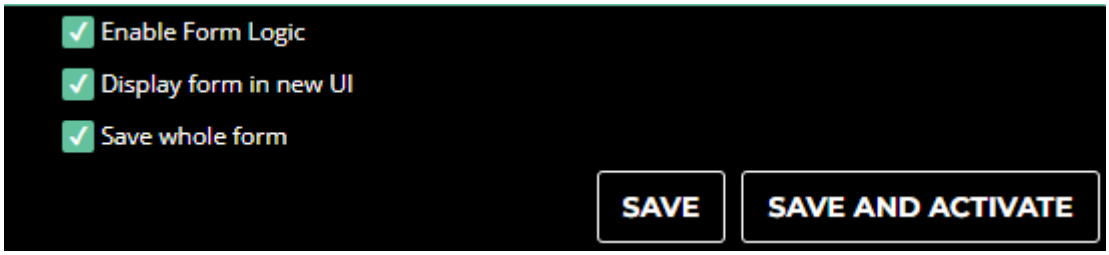
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The option to display or hide questions is only available in clinical form templates and audit form templates.

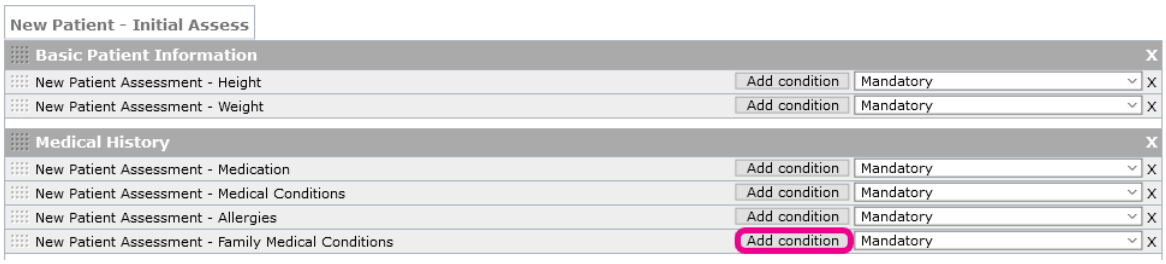
Add a condition

A condition can consist of one or many condition lines. To add a condition:

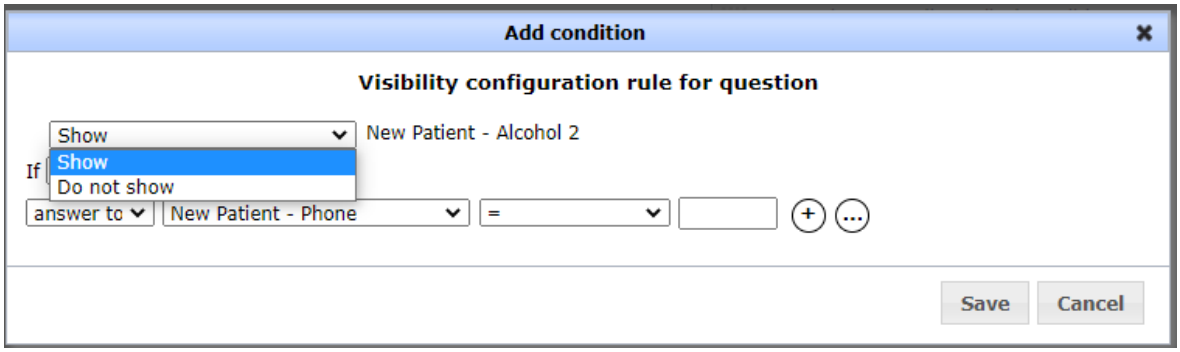
1. In the round audit form options, select **Enable Form Logic** and **Display form in new UI** to display the **Add Condition** button for all questions.



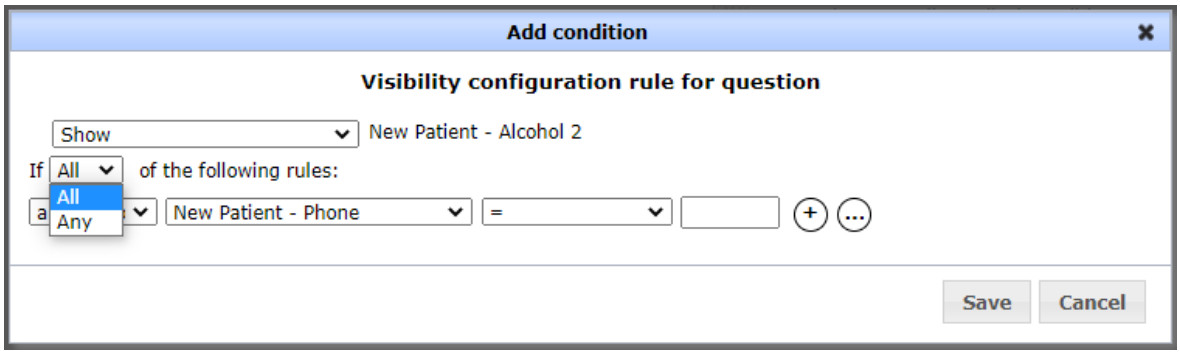
2. In the form, click **Add condition** in the appropriate question:



3. Select **Show** in the drop-down list to show the selected question on the form if the conditions are met, or select **Do not show** to hide the selected question if the conditions are met:



4. If you are entering multiple condition lines, use **Any** if any one or more of the conditions can be met or use **All** if all the conditions must be met:

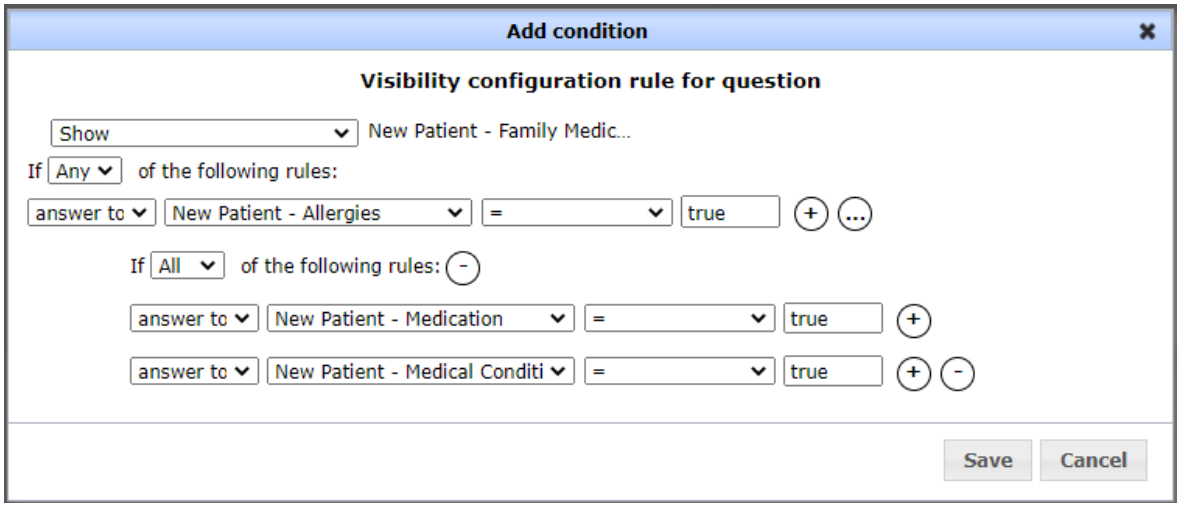


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5. Enter the condition line that you want. You can:
   - *Use responses to earlier questions in a condition* *(page 27)*
   - *Use patient demographics in a condition* *(page 28)*
6. You can create more complex conditions by grouping or nesting condition lines together. If you want to add more condition lines:
   - Click **+** if you want to add another condition line at the same level.
   - Click **...** if you want to add a condition at a lower level of nesting. You can use one level of nesting.

   If you no longer want a condition line that you have entered, click **-** to delete it.

   For example, to display the question "New Patient - Family Medical Conditions" if the question "New Patient - Allergies" is true OR if both the questions "New Patient - Medication" AND "New Patient - Medical Conditions" are true, the whole condition would be:

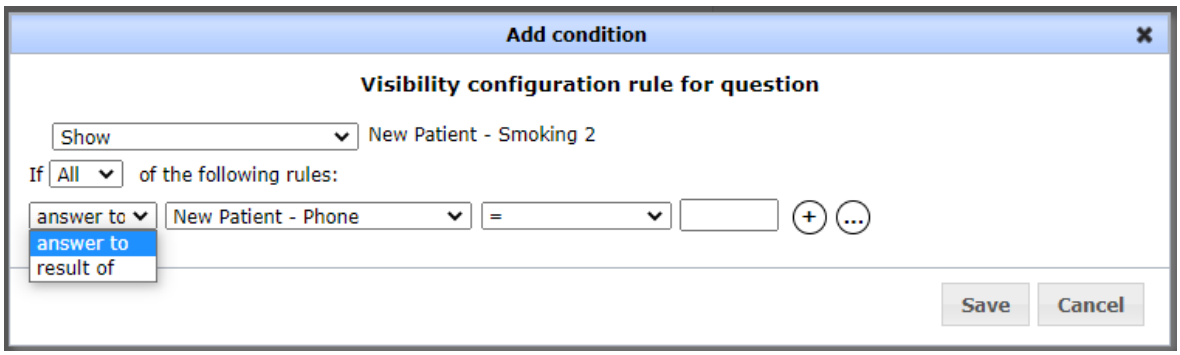


7. When you have completed the condition, click **Save**.

Use responses to earlier questions in a condition

To use responses to earlier questions:

1. Ensure the drop-down list in the first field of the condition is **answer to**:

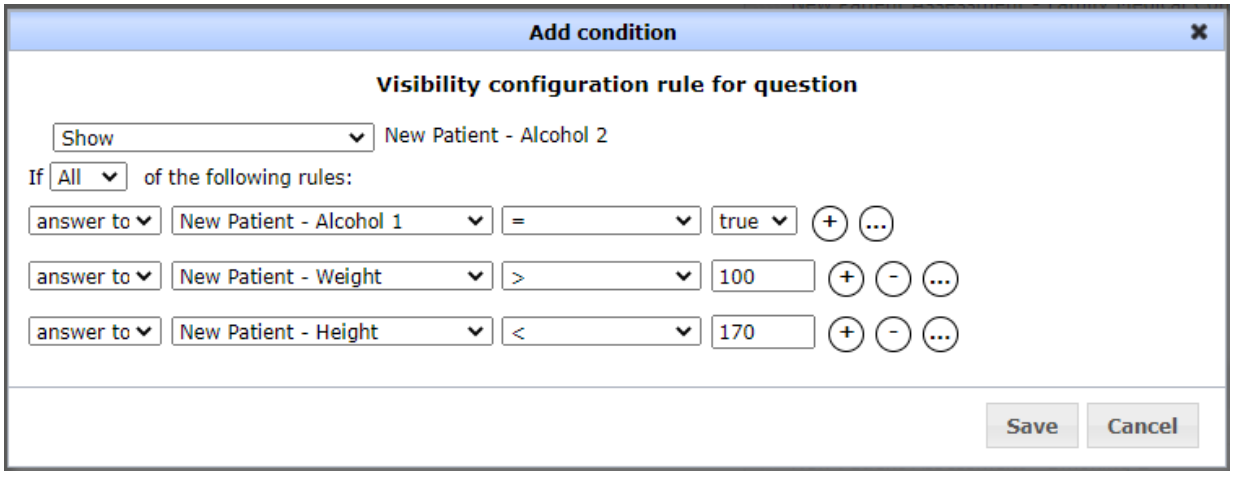


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2. Select the question that you want to use. You can use responses to the following question types in conditions:
   - Number
   - Whole number
   - Height
   - Weight
   - Multiple choice - a single or multiple answers
   - Multiple choice (checkboxes) - a single or multiple answers
   - Yes or no
3. Select the operator you want to use. For example, if you want to show the question to patients over a certain weight, this might be **>** or **>=**.
4. Enter the value you want to use. For example, if you are using weight, this might be `100` (kg) or `200` (lbs).

In the following example, the "New Patient - Alcohol 2" question is only displayed if all of the following three conditions are met:

- The answer to the "Alcohol 1 question" is true, and
- In the "New Patient - Weight" question, the patient entered a weight that is greater than 100 kg, and
- In the "New Patient - Height" question, the patient entered a height that is less than 170 cm.



Use patient demographics in a condition

You can use Twig-based logic and patient demographics, such as age and gender, in a condition. For example, you can ask only female patients if they are pregnant, or ask for a parent's telephone number if the patient is under 18.

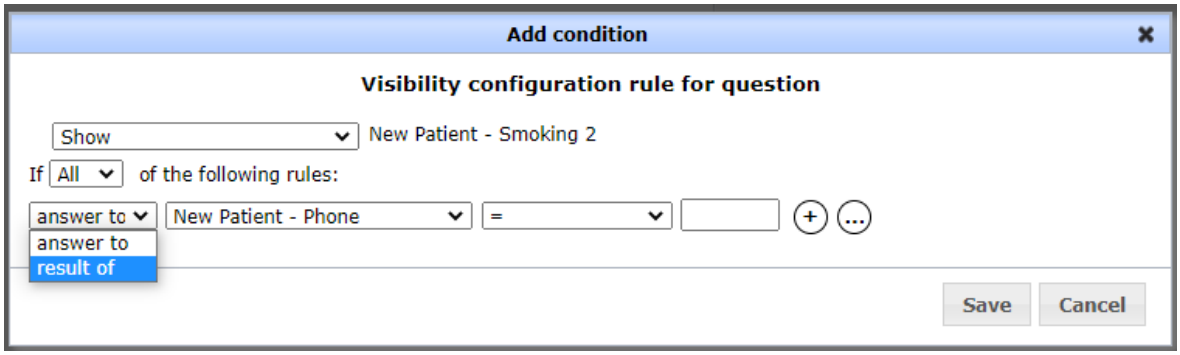
You can enter a Twig-based condition or you can use a pathway rule that already exists. The answer to the Twig-based condition or pathway rule must be `true` or `false`.

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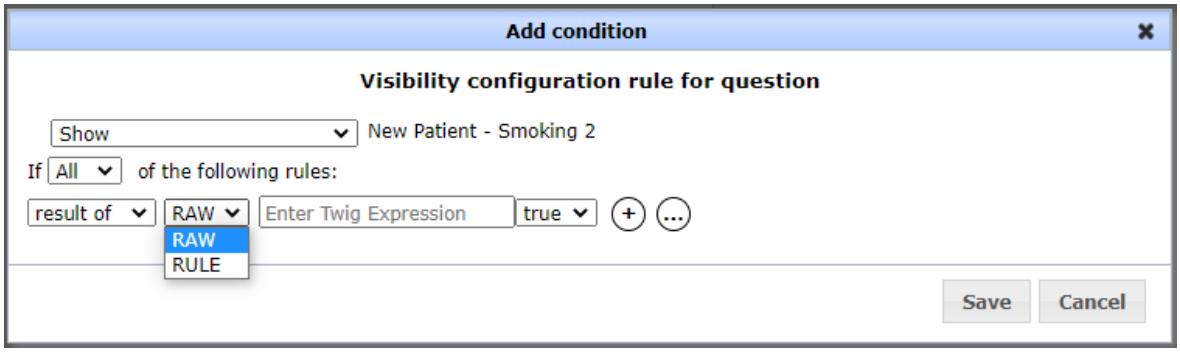
Twig-based condition

To enter a Twig-based condition:

1. Select **result of** in the drop-down list in the first field of the condition:



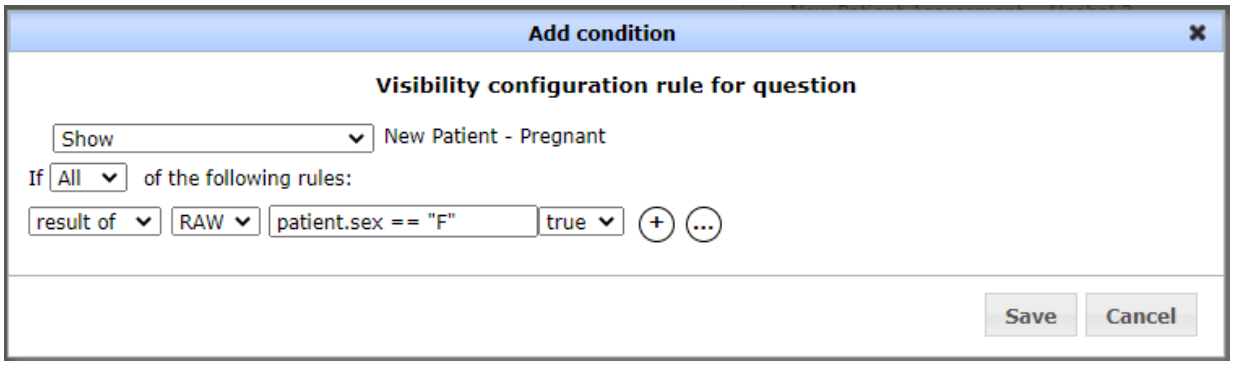
2. Ensure that the second field is **RAW**:



3. Enter the Twig-based condition that you want to use. For example, `patient.sex == "F"`.

4. Select whether you want the condition to be `true` or `false`.

In this example of a Twig expression, the "New Patient - Pregnant" question is only displayed if the patient is female:

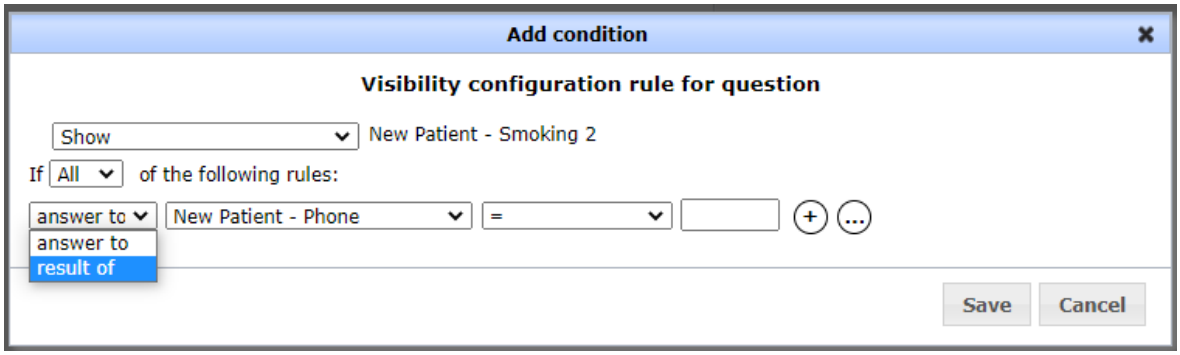


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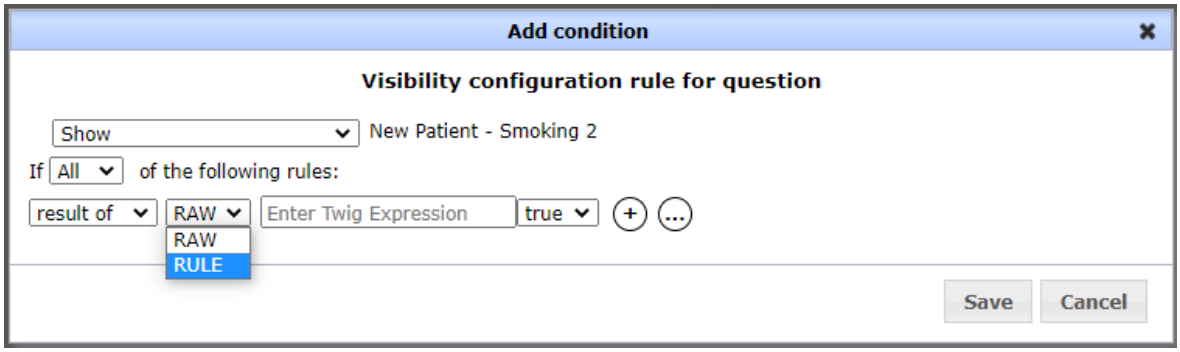
Pathway rule condition

To use a pathway rule in a condition:

1. Select **result of** in the drop-down list in the first field of the condition:



2. Select **RULE** in the second field:

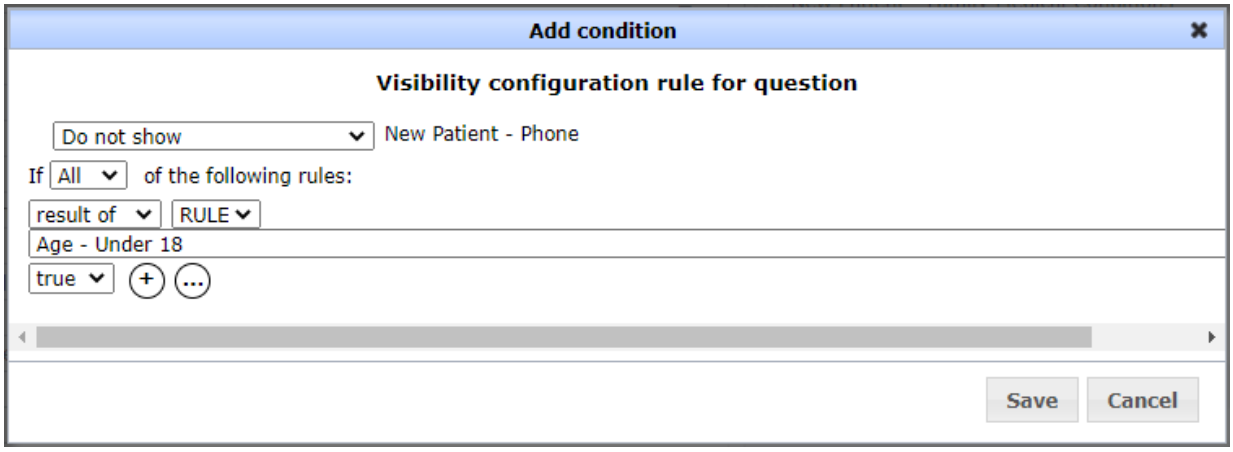


   A drop-down list of all the rules is displayed.

3. Select the appropriate rule from the drop-down list. For example, `Age - Under 18`.

4. Select whether you want the pathway rule to be `true` or `false`.

In this example of a pathway rule, the "New Patient - Phone" question is not displayed if the patient is under 18 years old:



The pathway rule "Age - Under 18" was created in **Pathway Rules** in the **Pathways** menu.

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Round audit form options

Complete the round audit form options using the following table:

Field name	Description
Enable form logic	You can select this to enable you to add conditions to individual questions. We do not recommend using conditions in round audit forms.
Display form in new UI	Select if you want the form to display in Conductor's enhanced UI.
Save whole form	Select to add an **OK** button at the bottom of the form which saves the whole form. If you do not select **Save whole form**, the form has individual **Save Section** buttons at the end of each section that the person completing the form must click.

Site audit forms

Site audit forms enable you to capture site-related information which can be used for reporting. For example, you might want to record the daily usage of equipment in your rooms.

Create a site audit form

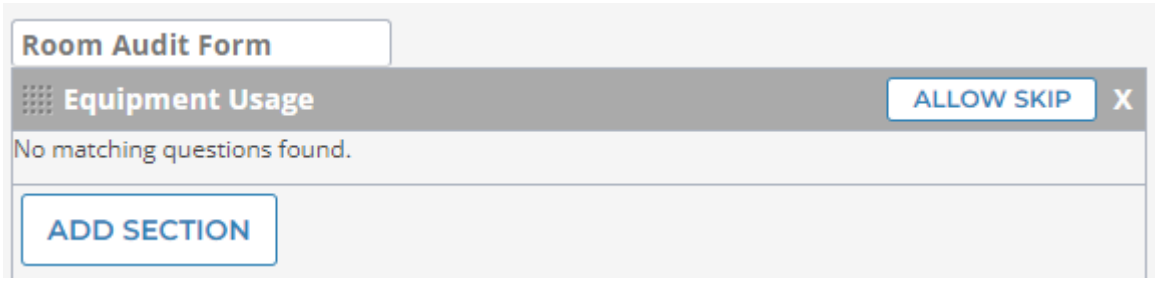
To create a new site audit form:

1. On the **Form Templates** page, click **New...** below the table of existing forms in the **Room Form Templates** section.



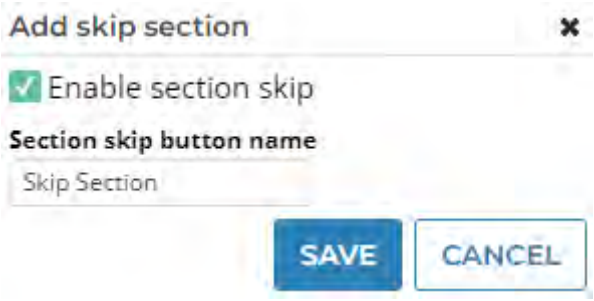
2. Enter the name of the form in the **New Form** field on the right and press **Tab**.

3. Click **Add Section**, enter the section name, and press **Enter**, to create a new section in the form.

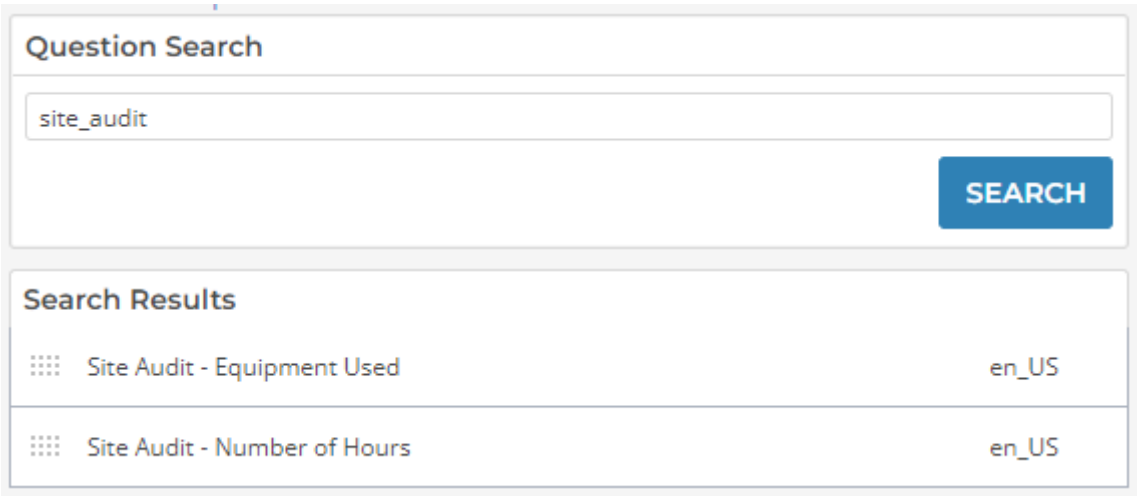


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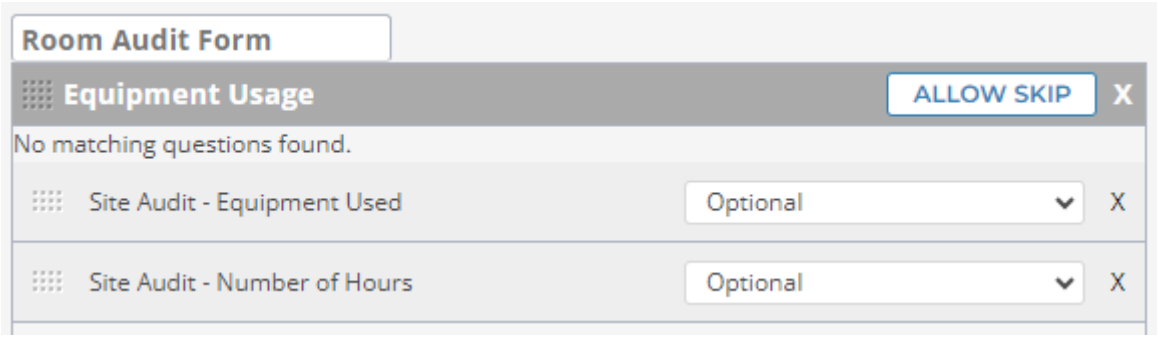
4. If you want the user to be be able to skip this section when they are completing the site audit form, click **Allow Skip**. The **Add Skip Section** window appears. Select the **Enable section skip** checkbox so that the user can skip this section. You can also change the name of the button that appears on the site audit form. Click **Save**.



5. In the **Question Search** section, enter key words or tags from the question that you want to add to the form and click **Search**. Conductor displays all the questions with names or tags that match the key words.



6. Once you have found the right question, click on the block of dots to the left of the question ⁞⁞ and drag it to the newly created section on the right.

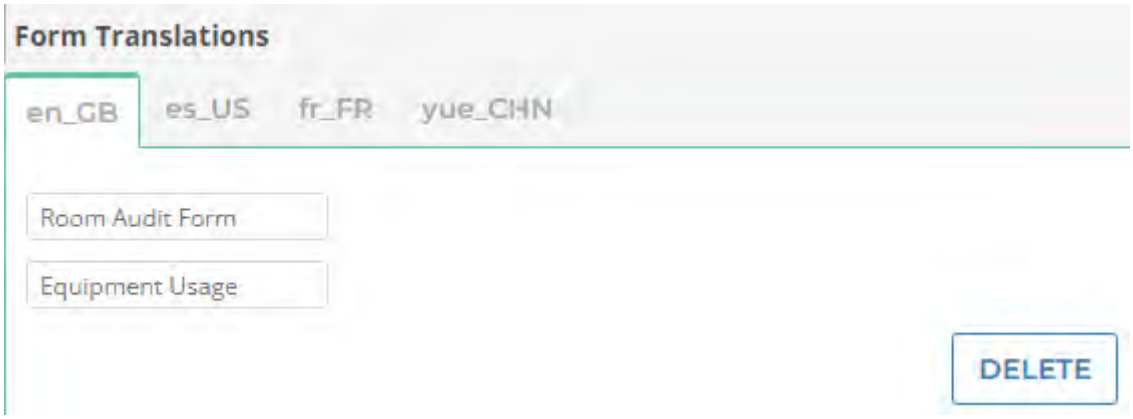


7. Select the option in the drop-down list to the right of each question to determine whether or not users must respond to that question:
   - **Optional** - Users are not obliged to respond to the question.
   - **Mandatory** - Users must respond to the question.
   - **Mandatory, allow reason for no result** - Mandatory, but a reason can be supplied if no result is given.

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8. Continue to add new sections and questions until the form is complete.

9. If multiple languages are configured for your organization, you can select the tab for the required language variant, then enter the translated text for the form title and section headers for the language(s).



10. Click **Save** if you do not want to make the form available yet or you want to make further changes to the form later. Its status is marked as **Pending**. You can activate the form later by clicking **Activate** in the row of the **Round Audit Form Templates** table to change the form from **Pending** to **Live**.



11. Click **Save and Activate** if you want to make the form active now so that you can use it immediately.

If you edit an existing form, you can click **Save and Activate** to save the form and activate it immediately. If you click **Save** after editing an existing form, the form has a status of **Pending**. When you are ready to make the form active, you can click **Activate** next to the form name in the table of forms to change it from **Pending** to **Active**.

Form versioning

Every time a form template is changed and then re-activated, Conductor creates a new version of the form. This means that forms created before changes took place are not affected by the changes.

Active and pending forms

If you create or edit a form and click **Save and Activate**, the form's status is marked as **Live** and you can use it immediately.

If you create or edit a form and click **Save**, its status is marked as **Pending** and, in this state, any changes to the form are not included when a new form is generated. This is useful if you do not want to make the form available yet or you want to make further changes to the form later.

You can activate a pending form by clicking **Activate** in the row of the appropriate table. This changes the status from **Pending** to **Live**. Once you have reactivated the form, the changes are visible when a new form is generated, and the user can see these changes when they fill in the form.

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To remove the form from the list available to be generated, click **Archive**. The form's status changes from **Live** to **Pending**. You can reactivate it again later.

To remove the form entirely, click **Cancel**.

To make a copy of the form, click **Copy**. You can edit or rename the copy of the form, as appropriate.

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Link forms

Link a form to an appointment

You can link forms to appointments, so that a form is automatically generated for a patient, in their account, each time the appointment is booked.

You can link a feedback form to an appointment type during the initial set up of the appointment type or you can be add it later.

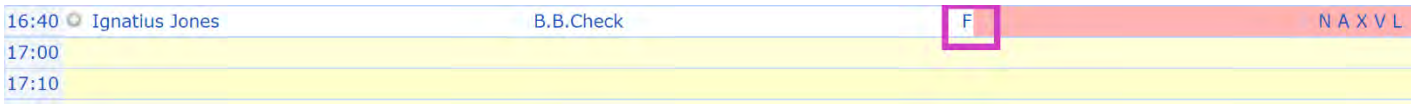


Administrators can view forms using **Forms** in the **Patient** menu of a patient's record. The associated appointment type displays in the **Appointment** column of the **All Forms** table.

All forms

Form Name	Form Created	Patient Access	% Completed	Locked	Appointment	Appointment Date	Appointment Time	Print	
Gyulyay Form	06/02/2017 15:29	Yes	0%	No	Concise check up	06/02/2017	16:30	Print	Cancel
life	01/02/2017 11:51	Yes	0%	No	Health Assessment	01/02/2017	12:30	Print	Cancel

A link to the form also displays in the practitioner's diary. Practitioners can launch the associated form by clicking **F** in the their diary. They can then complete the form by gathering the information from the patient.



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Link a form to a class

You can link forms to classes, so that a form is automatically generated for a patient, in their account, each time the class is booked.

You must link a feedback form to a class at the time of set up. You cannot add the feedback form later.



Company forms

Company forms are specific clinical forms that can be generated for a patient if they have been associated with a company.

During the appointment booking process, if a company has been indicated as the payee and a form has been associated with the appointment type, the **Send link to form** check box is selected and if **Send confirmation email** is also selected, a link to the form is sent to the patient.

When you create a form, select the **Company form** option, then enter the names of the company or companies that this form should be linked to.

The company email templates must contain form link merge tags. See *Add form links to appointment confirmation emails (page 36)*.

When creating a form for a patient, administrators can view generic forms as well as those of the company that the patient is associated with.

Add form links to appointment confirmation emails

If a form is to be sent to patient in their appointment confirmation email or in a feedback email, you must include a merge tag within the email template.

To change an email template:

1. Select **Email Templates** in the **Communication** menu, or select **HTML Template Management** in the **System Configuration** menu and then select the **Email Templates** tab.

2. Select the relevant email template and either select the **Default** option or create a company-specific version of the email.

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3. For a form link to be sent to the patient, include the following merge tags `<<form_link>>` or `<<feedback_form_link>>` between the merge tags `<<begin_form>>` and `<<end_form>>`.

Link a round audit form to a digital round

See **Digital Round Setup in Lumeon Conductor** for information on how to link a round audit form to a digital round.

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Form scoring

It is possible to produce a form score based on the responses to the questions on that form. Individual questions can also be scored with multiple complex conditions being associated with a question response to deal with all possible score permutations.

The two concepts associated with question/form scores are:

- *Individual question scores (page 38)*
- *Set scores (page 38)*

Individual question scores

Individual question scores allow the user to assign a numeric value, called an "adjusted score", against an answer to a question. Conditions are created and, once these are evaluated as being true, a score is stored against the question response.

Ensure that a condition is created for all possible outcomes of the question. For example, if there are two possible answers to a question, say Yes or No, and Yes has a score of 1 and No has a score of 0, then the adjusted score for both of the answers should be specified and not just the one that has a non-zero value against it.

If multiple conditions are created that evaluate to true, only the first condition that evaluates to true has the adjusted score saved to the database. If multiple conditions are created and none of them evaluate to true, an error is generated and a warning message is displayed asking the user to contact the system administrator. A score of 99,999.99 is stored against the question so that it may be easily identifiable in the database and rectified.

Set scores

Set scores are a way of adding together either the responses and/or the scores of one or many questions together, or many sets together, and assigning a numeric value (adjusted score) to the set.

Pathways

Scores generated either on individual questions or sets of questions can be exposed to a pathway. Conductor can create transitions to different case states based on generated scores.

Using tags in form scoring

You can use the following tags in question and set scoring:

- Most tags used in pathways
- `patient.individual.age - int|null`
- `patient.individual.nationality.description` - string

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- `patient.disability` - string
- `patient.maritalStatus` - int
- `patient.birthplace` - string
- `patient.occupation.occupationName` - string
- `patient.individual.nationality.description` - string
- `patient.interpreterLanguage` - string

You can use the following tags in set scoring but not individual question scoring:

- `question.name('Question 1').score` - float
- `question.name('Question 1').response` - string
- `question.name('Question 1').maxScore` - float
- `question.count` - The number of questions in the set.

Individual question scoring

Below are examples of the syntax that needs to be created in order to calculate an adjusted score to a question based on one or more criteria.

To set up scoring when creating a question, select the **Question Score** checkbox and complete the condition(s), as shown below:



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Example 1 - Multiple choice - dropdown with two options

The conditions are as follows:

- **Condition** - `patient.individual.sex == 'M' and response == 'smoker'`
- **Adjusted score** - `1`
- **Condition** - `patient.individual.sex == 'M' and response == 'nonsmoker'`
- **Adjusted score** - `2`

Example 2 - Multiple choice - dropdown with six options but only one option produces a score

The multiple choice contains the following options:

- 0 servings per week
- 1 serving per week
- 2 servings per week
- 3 servings per week
- 4 servings per week
- 5 or more servings per week

The conditions are as follows:

- **Condition** - `response == '5 or more servings per week'`
- **Adjusted score** - `1`
- **Condition** - `response != '5 or more servings per week' // Anything other than '5 or more serving per week'`
- **Adjusted score** - `0`

Example 3 - Short text

The conditions are as follows:

- **Condition**:
- **Adjusted score**:

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Example 4

The conditions are as follows:

- **Condition**:

```
patient.individual.age > 18 and patient.individual.age < 66 and
patient.individual.sex == 'M' and response == '5+ cigarettes per day'
```

- **Adjusted score** - `5`
- **Condition**:

```
patient.individual.age > 18 and patient.individual.age < 66 and
patient.individual.sex == 'F' and response == '5+ cigarettes per day'
```

- **Adjusted score** - `6`
- **Condition**:

```
patient.individual.age >= 66 and patient.individual.sex == 'M' and
response == '5+ cigarettes per day'
```

- **Adjusted score** - `15`

Question set scoring (section scoring)

To create a question set:

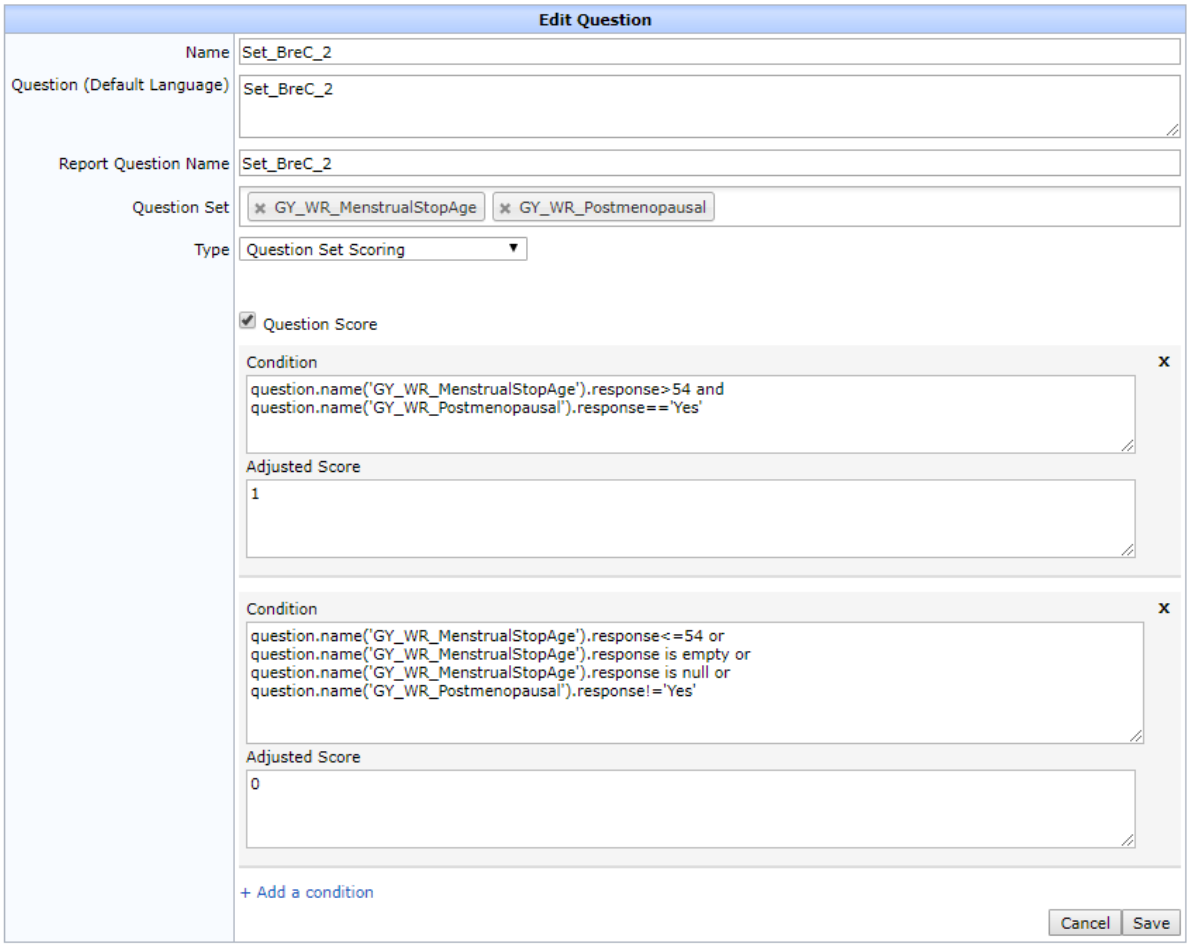
1. Create a new question.
2. Select the question type as **Question set scoring**.
3. Select as many questions or question sets that are required for the calculation of the current question set.
4. Select **Question Score**.
5. Enter the condition and the adjusted scores for the question set.
6. Ensure that a condition is created for when there is an adjusted score of 0.

Example 1

For the first condition, check the value of the question `GY_WR_MenstrualStopAge` to see if it is greater than 54 and check that `GY_WR_Postmenopausal` is equal to `yes`. If both of these are true then create an adjusted score for this set of '1'.

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For the second condition, check the value of the question `GY_WR_MenstrualStopAge` to see if it is less than or equal to 54 or no value has been entered and check that `GY_WR_Postmenopausal` is not equal to yes. If these conditions are true then create an adjusted score for this set of '0'.



Example 2

For the first condition, check the score of the question `QAge` to see if it's less than 30 and check that the score of `QStatus` is more than 60. If this is true, then add the scores of `QAge` and `QStatus` and the response of question `QAge`.

- **Condition**:

```
question.name('QAge').score <30 and question.name('QStatus').score >60
```

- **Adjusted score**:

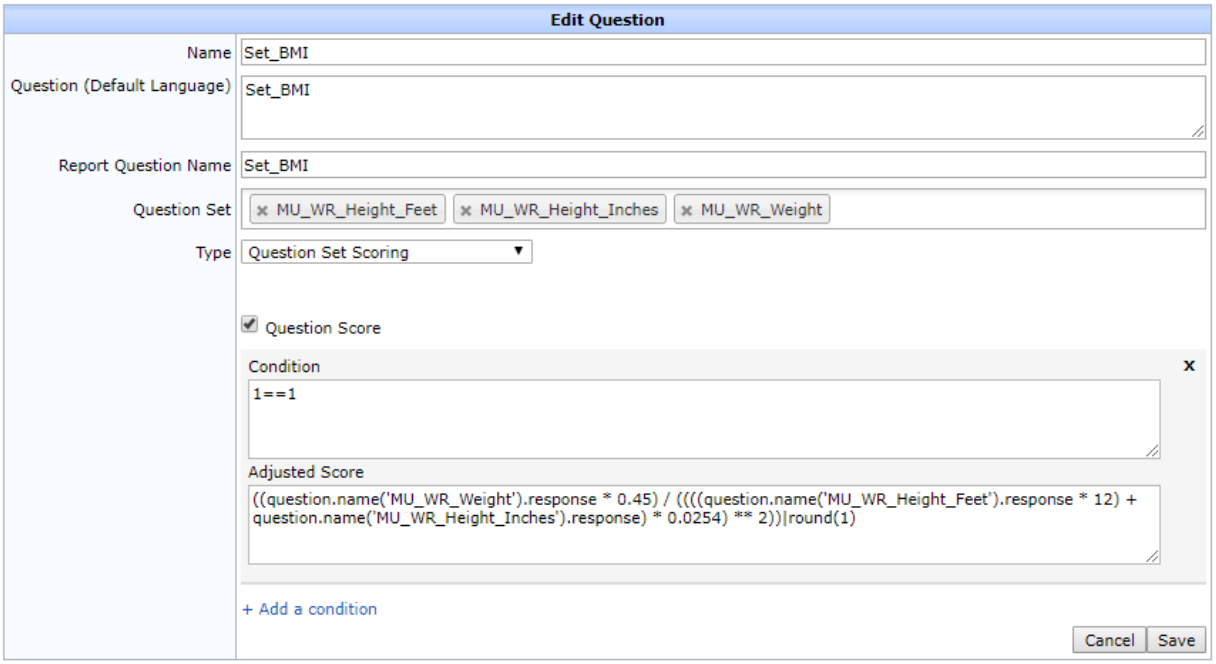
```
question.name('QAge').score + question.name('QStatus').score +
question.name('QAge').response
```

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Example 3

To work out a complex set score, for example BMI, you must use several questions as well as some mathematical functions in Twig.

In order to calculate the BMI from the questions created, we need to include **height** (in feet and inches) and **weight** (in pounds).



The condition of `1==1` has been used which means that it will always evaluate to `True` so we are always wanting to calculate the adjusted score for the BMI set.

The adjusted score is broken down below:

1. Multiply the weight in pounds by 0.45 (the metric conversion factor):

   ```
   question.name('MU_WR_Weight').response * 0.45
   ```

2. Convert the "feet" element into inches:

   ```
   (question.name('MU_WR_Height_Feet').response * 12)
   ```

3. Calculate the total height in inches:

   ```
   ((question.name('MU_WR_Height_Feet').response * 12) +
   question.name('MU_WR_Height_Inches').response)
   ```

4. Multiply the height in inches by 0.0254 (the metric conversion factor):

   ```
   question.name('MU_WR_Height_Feet').response * 12) +
   question.name('MU_WR_Height_Inches').response) * 0.0254
   ```

5. Square the height in inches x 0.0254:

   ```
   question.name('MU_WR_Height_Feet').response * 12) +
   question.name('MU_WR_Height_Inches').response) * 0.0254) ** 2
   ```

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6. Divide (1) by (5) to give the following:

```
((question.name('MU_WR_Weight').response * 0.45) /
((((question.name('MU_WR_Height_Feet').response * 12) +
question.name('MU_WR_Height_Inches').response) * 0.0254) ** 2))
```

7. Finally, use the function `|round(1)` to round the answer to 1 decimal point.

Multiple set scoring

To calculate the score for multiple sets, first create the questions required in a section. Then create a question set score that calculates the score for that section. Repeat for as many sections as you want to include in the overall score.

For each section, the question set score is only calculated after the section has been saved. To add up the value of the set scores in all sections, a new question set score must be created that adds up the total of all individual section set scores. This form total question set score must be added to the final section of the form.

It is possible to have multiple set scores on one section or form however when saving forms by section, for a set question to calculate correctly, all questions in the set need to be answered either in the same section as the set score question, or in sections that have already been completed.

It is also possible to have set score questions based on the scores of other score questions.

Using form scores

In order to calculate a set score, the questions that make up the set score must be in the same form as the question set.

Question set scores are not visible on a form.

Question responses are stored as strings even though they may have been entered as numeric scores. Therefore, when testing for their values, you must use single quotes around the value, for example, `response == '196'` rather than `response == 196`.

In pathways, scores are accessible and it is possible to access one of the scores created over time, for example:

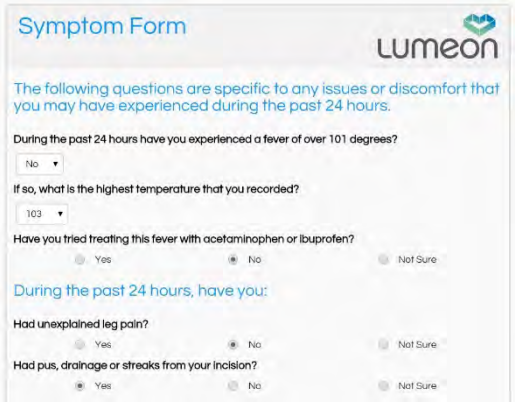
```
referral.formResponses('Score Question Set 1')|last.score == 100
```

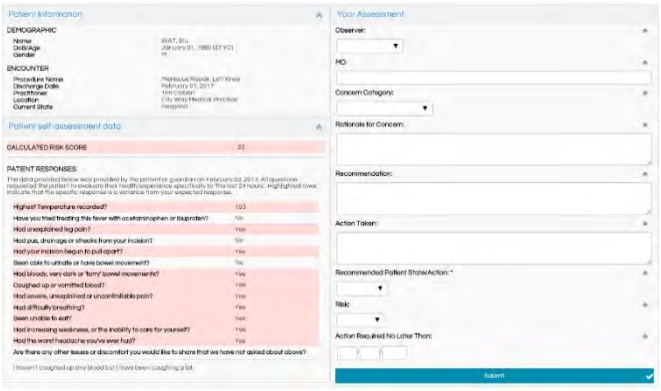
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Custom form layouts

You can apply custom layouts to clinical forms using an HTML/Twig template and CSS.

You can use Twig tags in the HTML section to access patient data and historic form responses for display purposes. You can also use Twig logic to control the conditional display of information. For example, you can highlight previous responses to questions or only show data that exceeds certain values. The defined CSS is applied to the Twig template allowing you to customize the look and feel of a form. Examples of custom form layouts are:

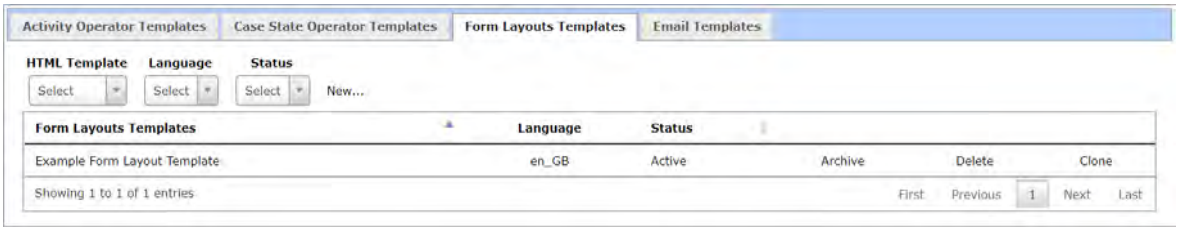




Create a custom form layout template

To create a custom form layout template:

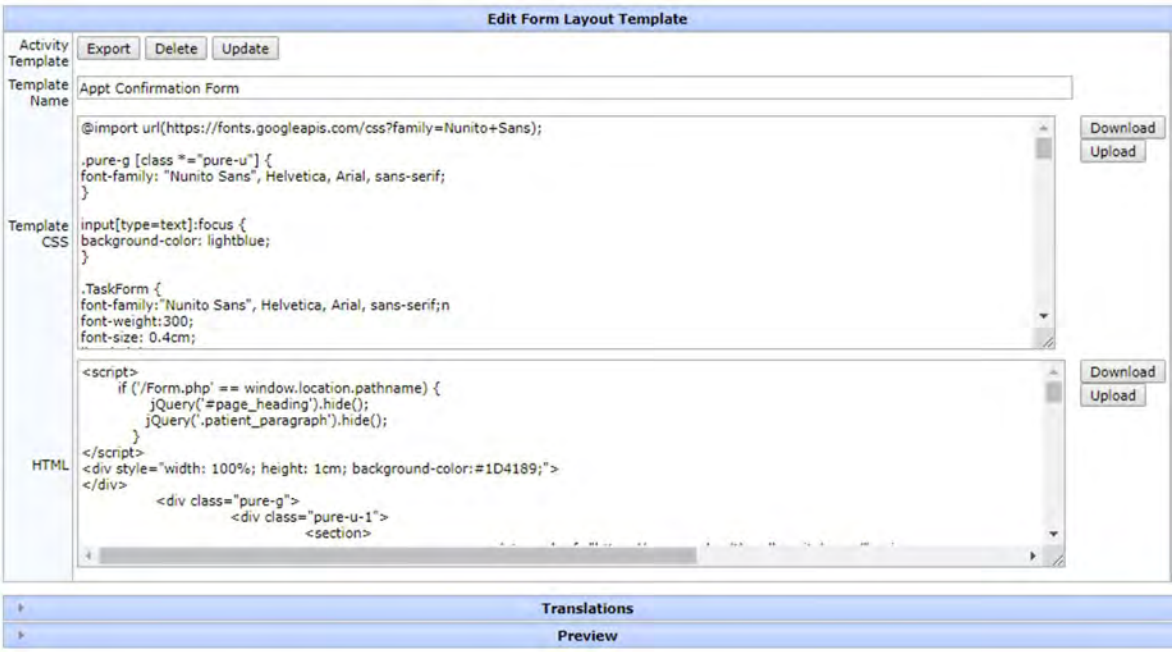
1. Select **Form Layouts** in the **Forms & EMR** menu, or select **HTML Template Management** in the **System Configuration** menu, and then select the **Form Layouts Templates** tab.



2. Click **New...** to display the **Form Layout Template** page.

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3. Enter the name of the template.



4. You can enter the CSS and HTML directly into the fields in this window, or use one of the following options. Template content is in JSON format.
   - **Download** - Download the CSS or HTML elements separately so that you can edit them outside Conductor. You may find it useful to download the CSS or HTML prior to making changes so that you have a record of it and can restore it to the original version, if necessary.
   - **Upload** - Upload the CSS or the HTML separately into the template after you have created or edited them outside Conductor.
   - **Copy and paste** - If you have created or edited the CSS or HTML elements, or translations, outside Conductor, you can use standard copy and paste commands to copy them into the template.
   - **Export** - You can export a file containing the existing CSS, HTML, and translations, so that you can import it into another new template. This is also useful for copying templates between different deployments of Conductor.
   - **Import** - In a new template, you can import the CSS, HTML and translations from a template that you have exported from Conductor. This is also useful for copying templates between different deployments of Conductor.
5. If multiple languages are configured for your organization, you can include translations - see *Translations (page 47)*.
6. When you have finished, click **Create**.
7. Click **Return to HTML Template Management** at the top left hand side of the page.



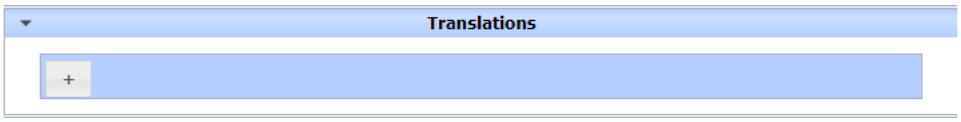
8. Find the new template in the list and click **Activate**. To make it easier to find the template, you can select **Pending** from the drop-down list in the **Status** field to display pending templates only. You cannot use the template until its status is **Active**.

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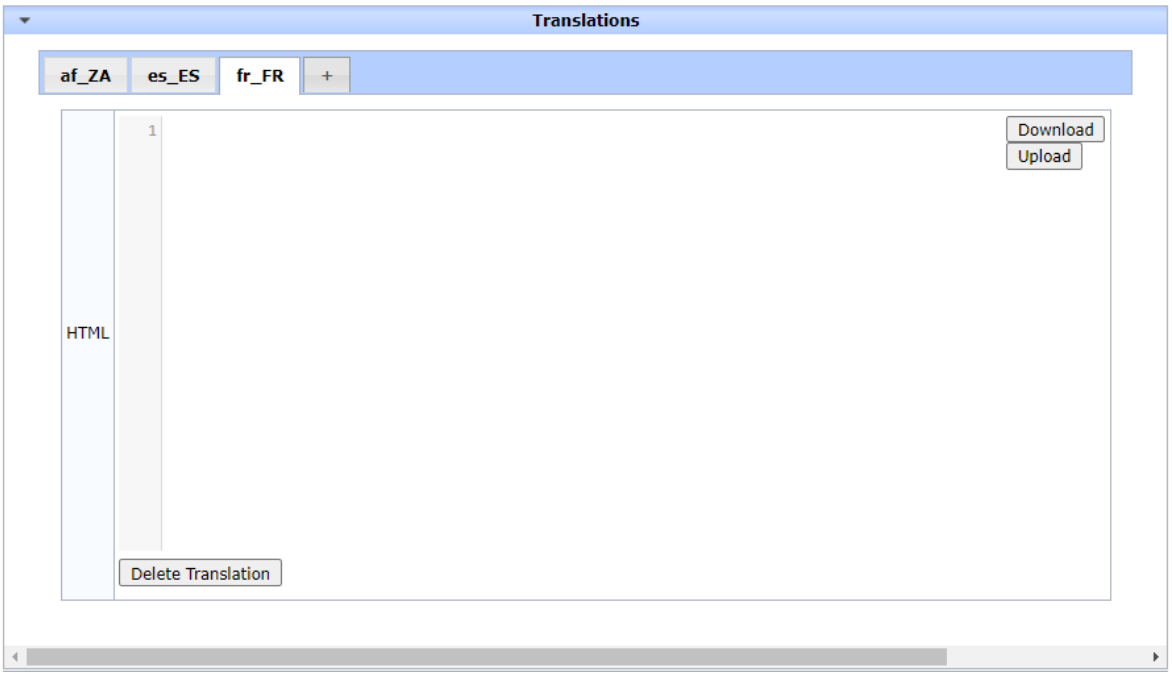
Translations

If multi-language configuration is enabled, you can create language translations for each template and any template variations. To do so:

1. Click on the **Translations** bar to expand or shrink the section.



2. Click the **+** tab and select from the available language options to create new language variants for the template.

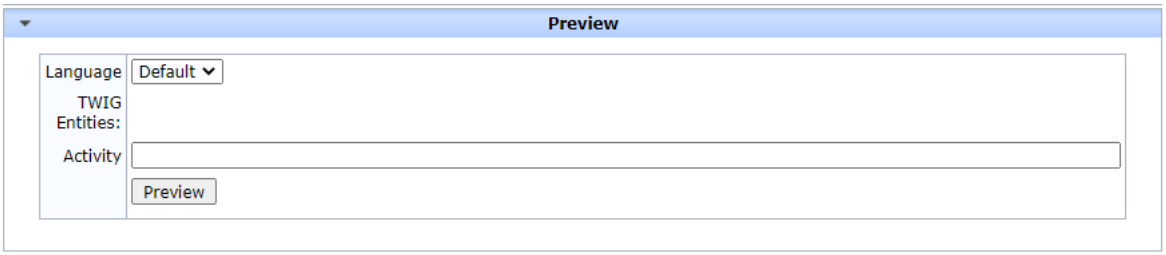


You can remove a translation by clicking **Delete Translation**.

Preview

You can see what the template looks like. To do so:

1. Click on the **Preview** bar to expand or shrink the section.



2. Leave the **Language** field as **Default** or select the language that you want to preview from the drop-down list.

3. Depending on the template type, you can enter Twig entities in the appropriate fields to provide a more accurate visual representation of the generated template.

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4. Click **Preview** to display a preview of the template in a pop-up window.

Use custom form layout templates

Conductor applies the defined CSS to the Twig template enabling you to customize the look and feel of a form.

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Using forms

As a practitioner

If a form has been linked to an appointment type, an **F** displays in the diary. When you click this, the form launches for you to view or update it.

To manually generate another form for a patient:

1. Click on a booked appointment and click **Forms** in the **Appointment** menu on the right.



2. Select the form type from the drop-down list in the **Create Form** form, and click **Create**. The form displays in the table of existing forms.

3. Select the form in the table, fill in the required data. Ensure that each section is saved or click **OK**.

4. Practitioners can lock the form permanently by clicking **Lock Form**. However once a form is locked, it cannot be unlocked. If the form is not locked, forms may be configured to accept and record all future responses.

You can print or cancel forms.

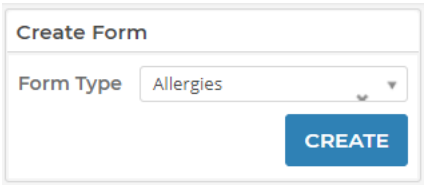
If a form has been linked to an appointment type, you can also view and edit it by clicking on **Clinical Forms** or **Referral Forms** in the **Patient** menu in the patient's record.

As an administrator

Clinical forms

To create or view forms for a patient, click **Forms** in the **Patient menu**.

To create a new form for a patient, select the form from the drop-down options in the **Create Form** section on the right of the page, then click **Create**.



Created forms, including any auto-generated when booking an appointment, appear in the **All Forms** table.

Click on the **Form Name** to fill in the form fields. Ensure that you click **Save Section** after you complete each section. You can then print or cancel the form.

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Feedback forms

Once you have created a feedback form, you can link it to an appointment type so that it is automatically sent out once an appointment has taken place. You can also link a feedback form to a class so that it is automatically sent out after the class is finished. See *Link a form to an appointment (page 35)* and *Link a form to a class (page 36)*.

Administrators can complete a feedback form that is not linked to a patient. This data is recorded in the same way as an anonymous feedback form. To fill in a form in this way, select **Patient Feedback** in the **Data Import Tools** menu.

Sending feedback forms to patients

Clicking **L** in the diary once the appointment has finished, automatically triggers the email.

If a patient receives an email with a link to a feedback form, clicking on the link opens the form in a new window.

Receiving feedback

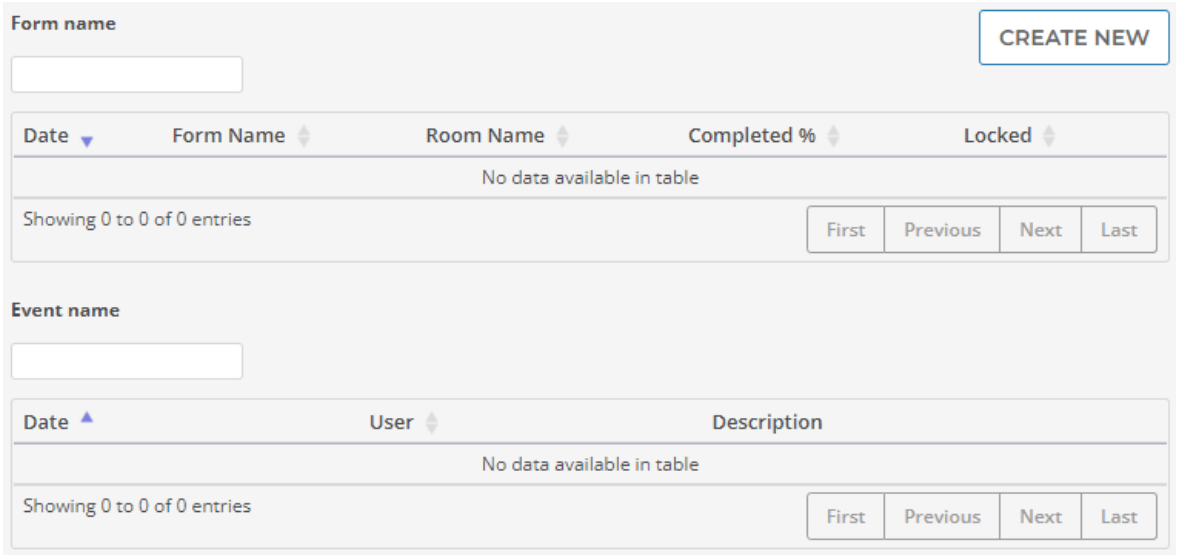
You can view completed feedback forms within a patient's account if they have not been set as anonymous.

We advise that you create a custom report to view the results of feedback forms.

Site audit forms

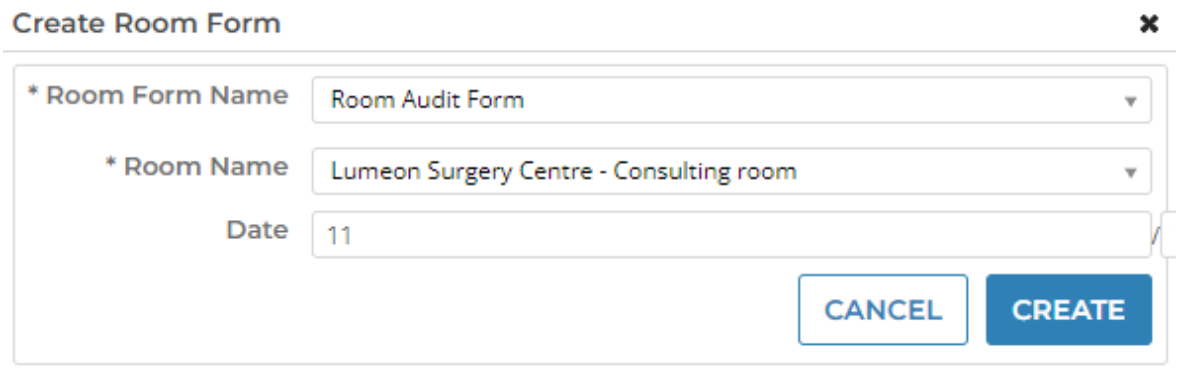
To complete a site audit form:

1. Select **Site Audit** in the **Diary** menu. A table of existing site audit forms displays.

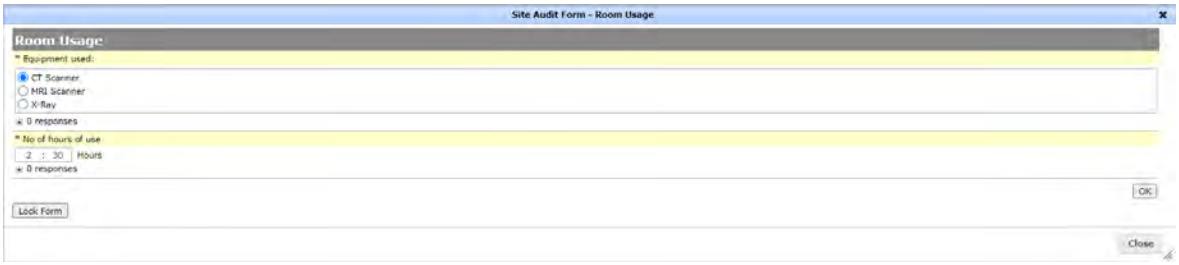


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2. Click **Create New** in the top right corner of the page. The **Create Room Form** window displays.



3. Select a room form from the drop-down list and the room to fill the form for.
4. Today's date displays in the **Date** field. Enter a different date, if required. You can use the **tab** key to move to each section of the date.
5. Click **Create**. The site audit form displays.
6. Complete the questions in the site audit form for the selected date.



7. Click **Lock Form** if you want to prevent it from being edited further.
8. Click **OK** to save the form. The completed site audit form displays in the list of existing forms.

As a round auditor

See **Digital Rounds in Lumeon Conductor** for information on how to conduct a digital round audit.

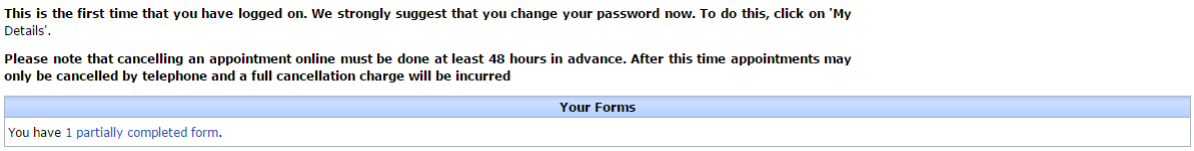
As a patient

If a patient receives an email with a link to a form, clicking on the link opens the form in a new window.

Patients can partially complete a form and then return to complete the form later, without the email link expiring. Only incomplete sections are shown on returning to the form.

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If your organization uses the patient portal, patients can access forms when they log into the patient portal.



Completed forms are visible to administrators and practitioners. If the completed form has not been set up as anonymous, it is visible on the patient's account.

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Security points

System administrators and Lumeon Support have access to security point settings which can enable or disable visibility of Conductor functionality for other users.

The following security points control access to forms functionality:

Security point	Description
Appointment.Forms	**Can View** - Controls access to the **Forms** submenu item on the **Appointment Details** page and the **Forms** page.
Form.FileUpload	**Can View** - Controls access to the **Form File Upload** page.
Form.Print	**Can View** - Enables a user to print a form.
Forms.Default	**Can View** - Controls access to the **Forms & EMR** menu.
Forms.DiagnosticFormBuilder	**Can View** - Enables a user to configure a form. User can click on link from the **Forms** page.
Forms.Forms	**Can View** - Controls access to the **Form Templates** option on the **Forms & EMR** menu.
Forms.Layouts	**Can View** - Controls access to the **Form Layouts** option on the **Forms & EMR** menu and the **Form Layouts** page. **Can Add** - Enables a user to create a new form layout. **Can Edit** - Enables a user to edit a form layout. **Can Cancel** - Enables a user to cancel a form layout.
Forms.Questions	**Can View**: Controls access to the **Questions** option on the **Forms & EMR** menu.
Forms.Questions.Score	**Can View** - Controls access to question scoring functionality. **Can Edit** - Enables a user to edit question scoring.
Patient.Forms	**Can View** - Controls access to the Forms submenu item in a patient's account and the **Forms** page. **Can Add** - Enables a user to create new forms. **Can Cancel** - Enables a user to cancel forms.

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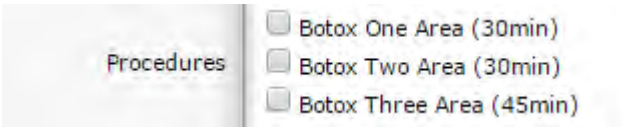
Appendix 1 - Question types

The question types you can use in forms in Lumeon Conductor are listed below. Barcodes can be scanned into any text input field.

Any question types with an asterisk ***** displayed next to them, indicate that the question type is supported in the Classic+ UI for both clinical and feedback forms. Select the **Display in new UI** option when building a form to generate a form with a more modern look and feel.

Chargeable items (check boxes)

These questions create a charge on the patient's account. Start typing the name of the product in **Product Name**. This field works on autocomplete and displays corresponding search results. Change the product description if necessary and click **Add**. Repeat for other chargeable products.

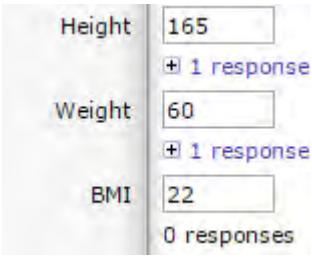


Date *



Derived value

A derived value performs a calculation based on responses to other questions. You must place the questions to which a derived value refers before the derived question, and all the questions must be in the same section of the EMR page or form. The calculations are written in PHP. Contact Lumeon Support for more information or to use this functionality in a form.

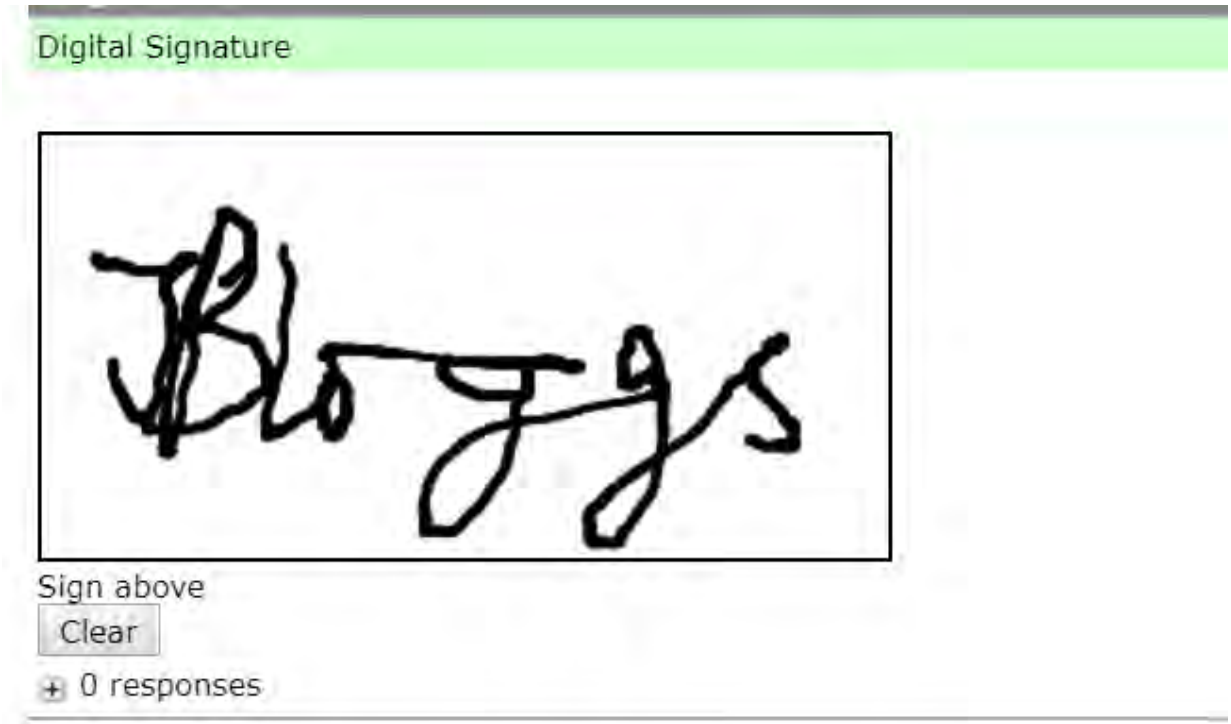


Digital signature *

Signatures can be captured on forms using the **Digital Signature** question type.

The user can draw their signature using the mouse, trackpad, or touch screen, of their device. They can also upload an image file containing their signature by switching the form field over to the file upload function.

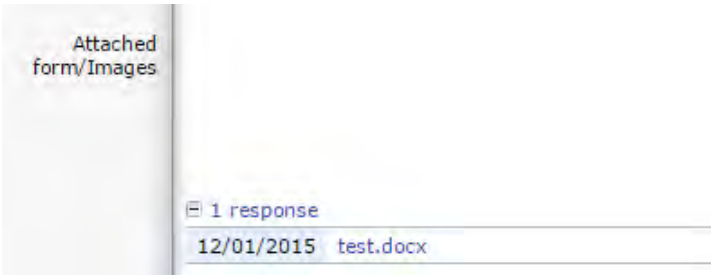
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File upload *

A user can browse and upload a file from their computer or from the **Paper Archive Pool**. They can also drag and drop or scan a file.

A progress bar displays while the file is uploading. Once the upload is complete, a thumbnail image displays to show that the upload was successful.



Goal management

This enables patients to create, update, and record as complete, their own custom goals. These goals must also be linked to an activity.

Goal tracker

This behaves like the existing **Number** question type with the following differences:

- Questions of this type must be created as part of an activity.

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- When the question is answered, it creates a goal if one does not already exist and records a score against that goal. If the goal does already exist, responses display as new scores against that goal.

Height *



HTML *

The HTML question type is a way to render custom HTML on a form in place of a question. HTML question types are designed for forms and the HTML coding does not work on EMR pages. For example:

```
It’s <strong>very</strong> important that you answer these questions
<strong>correctly</strong>.
```

Displays on a form as:

> It’s **very** important that you answer these questions **correctly**.

You can add HTML questions after any question. HTML questions do not take section controller questions into consideration and display regardless of the section controller answer. See *Section controller (Yes/No) * (page 59)*.

HTML questions are written in HTML programming language and you can use all tags and styling options applicable in HTML when writing HTML questions. See *https://www.w3schools.com/html/* for further information on HTML.

You can include Twig tags in HTML questions. This enables you to include patient information, such as their medical history, clinical information, or medication, in the question. For example:

```
Our records show that you are taking the following medication:
<strong>{{ patient.medication }}</strong>
```

Displays on a form as:

> Our records show that you are taking the following medication: **Omeprazole**

Image

Displays an image. This question type is platform-specific and is not available on all platforms.

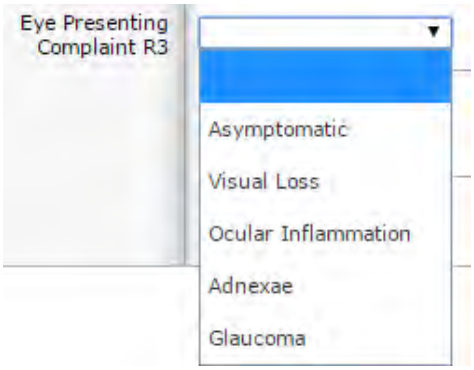
Long text *



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Multiple choice *

Enter each option on a new line. You can include an **Other** option. Users can select multiple options. Multiple choice boxes can be rendered as autocomplete. The question works in forms, EMR and EMR2.



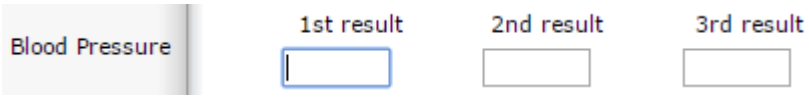
Multiple choice (check boxes) *

Enter each option on a new line. Can select multiple options. Can display one under another or from left to right.

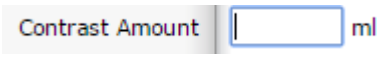


Multiple short text

Enables you to add up to three short text questions.



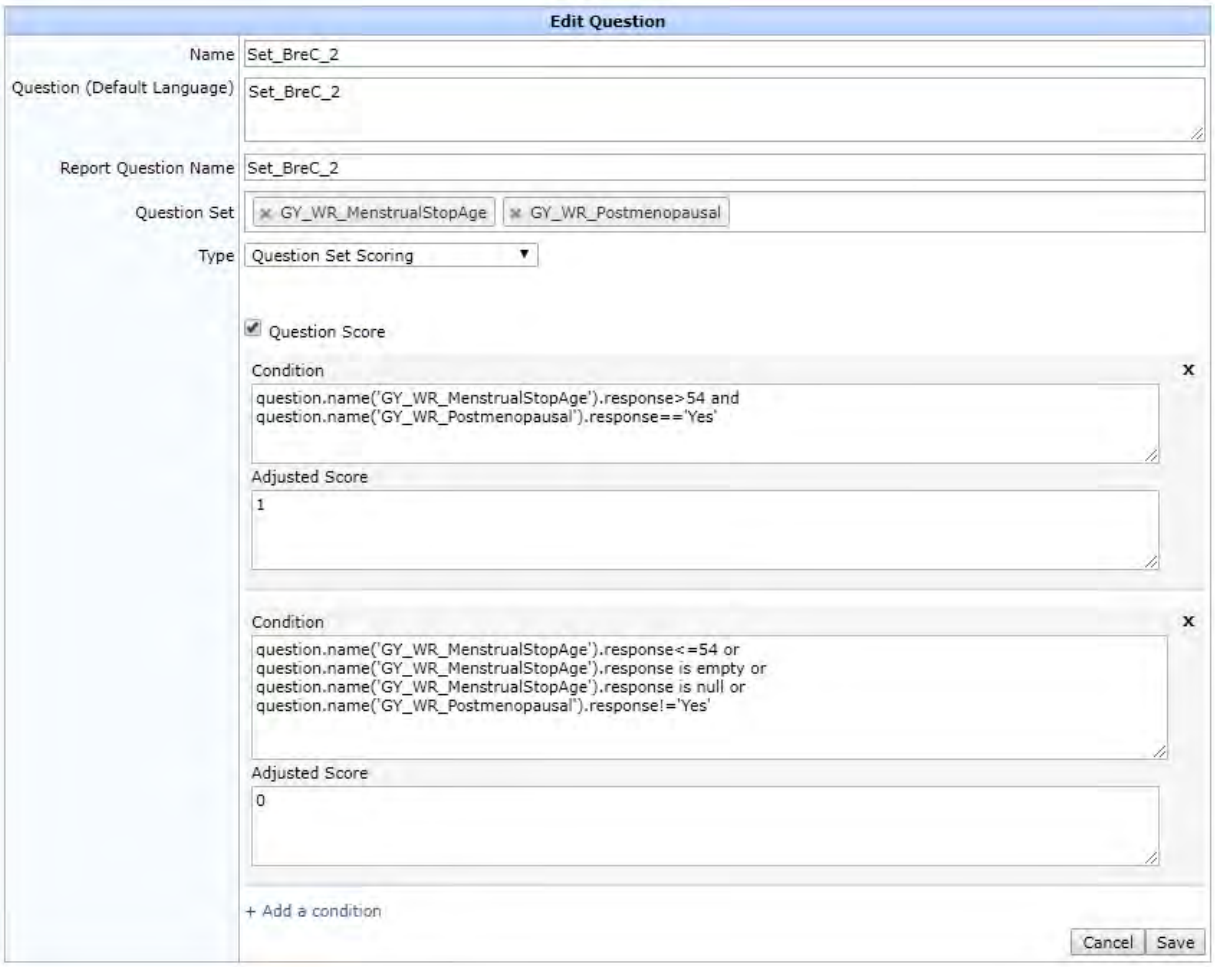
Number *



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Question set scoring *

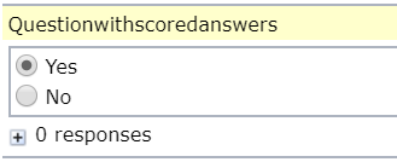
Calculates the total score from multiple question scores.



Question with scored answers

When configuring this question type, list the options. After each option, indicate their score which is stored in the database.





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Room

Enables a user to select from rooms stored in Conductor.

Section controller (Yes/No) *

A section controller question influences whether all or none of the other questions in the section will show. Choose whether an answer of **Yes** or **No** to the section controller question displays or hides the other questions in the section.

Short text *

Short text questions enable you to add questions to a form that require a short response up to 1024 characters. For example:



Use the long text question type if you want a longer response.

You can enter a ***regular expression*** (regex) in a short text question to validate the value that a user enters in reply to the question. For example, if you want the answer to be an email address, you can set up a regex definition to ensure that the user enters a valid email address.

See ***Lumeon Conductor for System Administrators*** for information on how to set up regex definitions.

See *Regex Library* for examples of regular expressions and how to use them.

Slider

Set the minimum and maximum value and the step size between values.



Time *



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User group *

The user group question type enables you to add a list of users to a form. When a user completes the form, they can select a user from the drop-down list in the user group. For example, you could have a question where the person completing the form can nominate another member of staff.

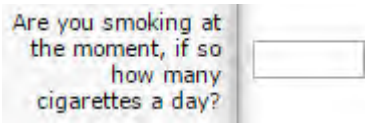
See ***Lumeon Conductor for System Administrators*** for information on creating user groups.

Weight *

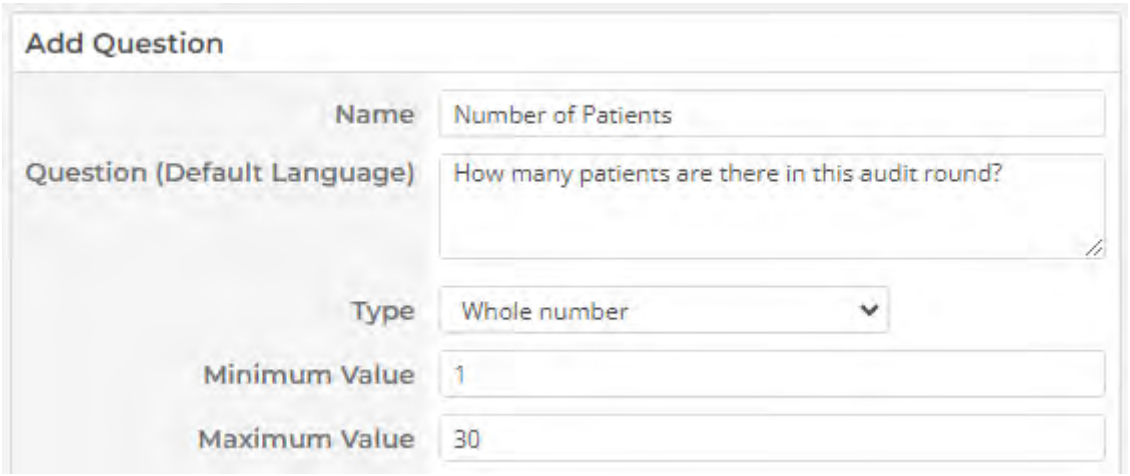


Whole number *

Use this question so that a user can enter a whole number in response to a question.

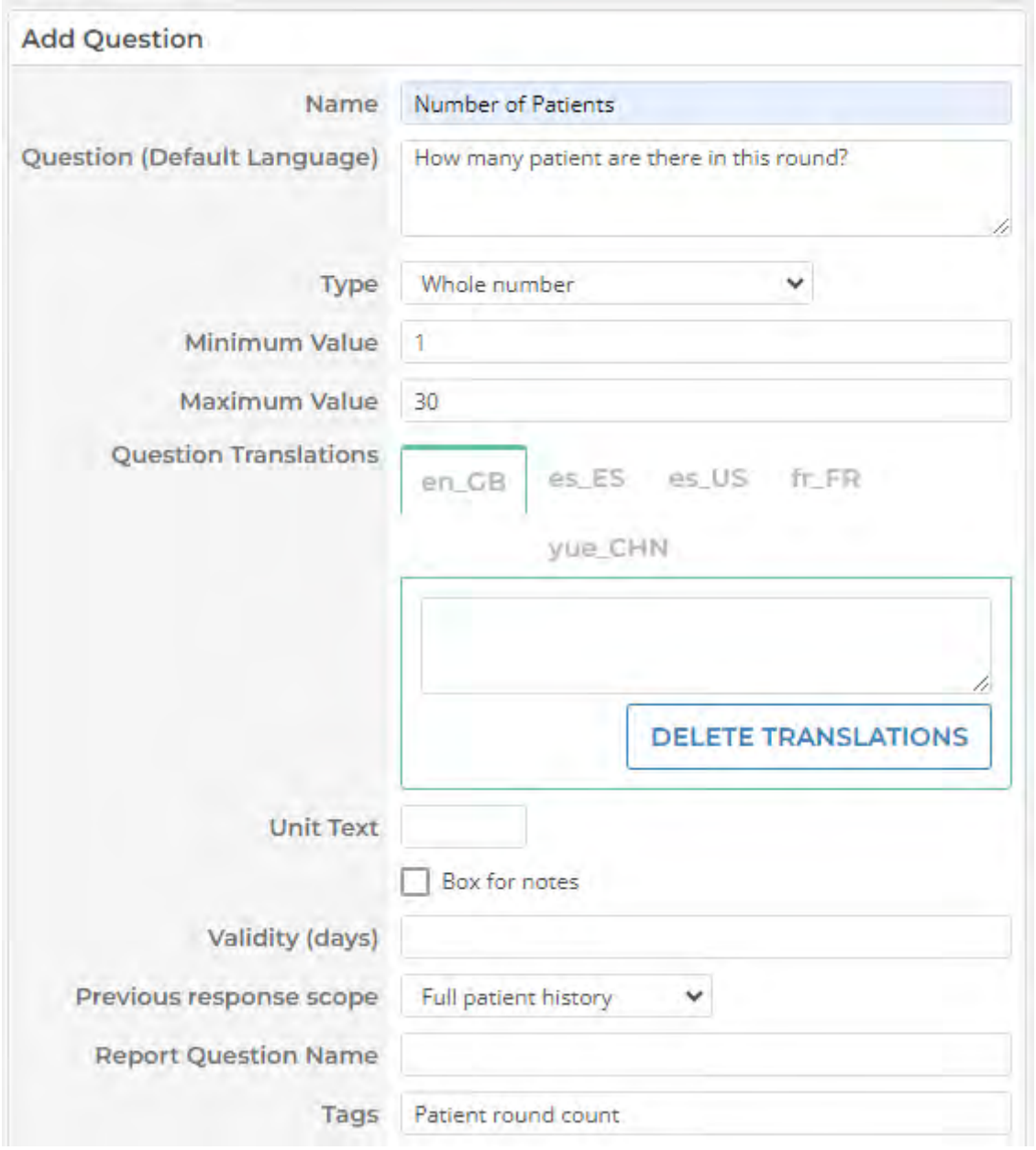


You can add a minimum value and a maximum value for the question.



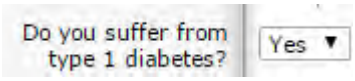
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To create a field that automatically displays the number of patients in a round audit form, enter **Patient round count** in the **Tags** field. When a round auditor displays the round audit form, the number of patients in the round automatically populates in this field and displays a separate section for this number of patients. The round auditor can change this value if required.

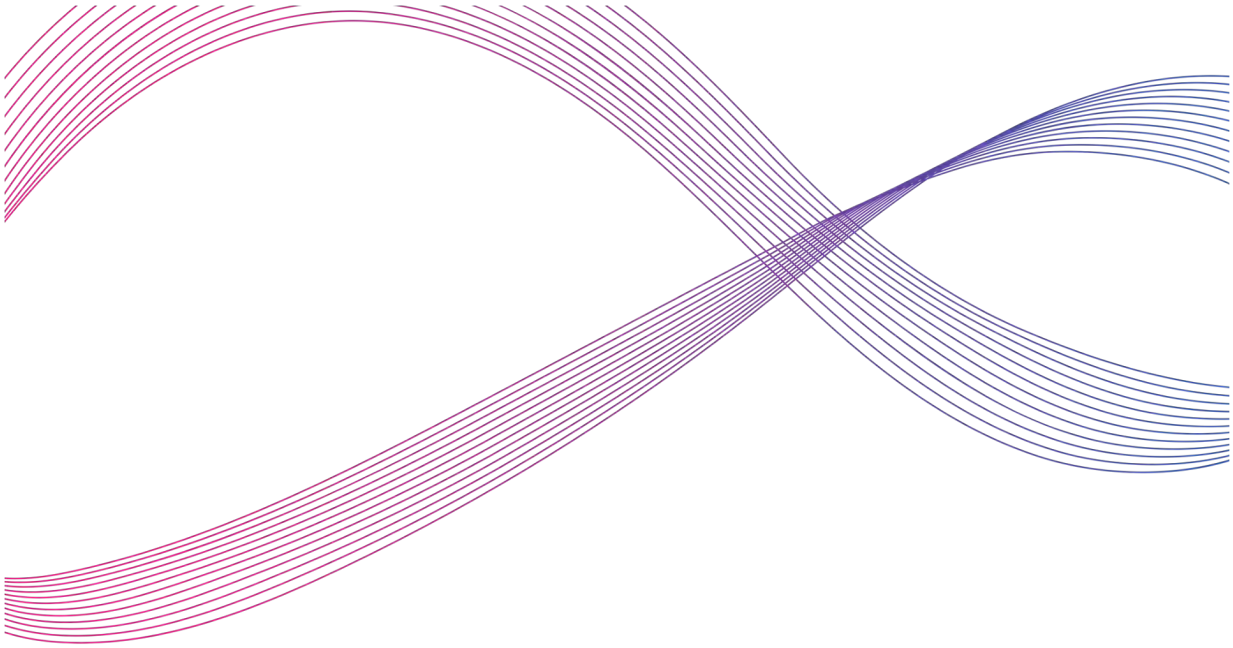


We recommend adding a maximum value to this question when using it in a round audit form, and using this maximum to determine the number of patient sections required in the form. See *Round audit forms (page 22)* for more information on building a round audit form.

Yes or no *



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Healthcode in Lumeon Conductor 24.2

Issued by: Lumeon Learning
Date of issue: August 2024

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Introduction

Healthcode is a clearing service that enables healthcare providers to submit invoices to private medical insurers electronically for processing and payment. Lumeon Conductor can be configured to generate claims which can be submitted to Healthcode and to reconcile their remittances against invoices.

Healthcode functionality

Healthcode users log onto the Healthcode clearing service and upload an XML message file which contains one or more invoices. Conductor can generate this Healthcode claims file. When users submit billing data to Healthcode, it carries out validation checks on the invoices. If the data complies with the rules laid down by the insurers, the invoice is forwarded to the insurer. If the data does not comply with the rules, for example, there is a missing membership number, the invoice fails validation and the user must correct the error before the invoice can be resubmitted for validation.

A number of private medical insurers forward remittance data to Healthcode. Users can log onto the Healthcode system and download the remittances file. The file can then be imported into Conductor, where automatic reconciliation against invoices takes place.

Multi-site submission to Healthcode is available, so that you can send data from more than one location.

See *https://www.healthcode.co.uk/* for more information on Healthcode.

Purpose

The purpose of this document is to:

1. Capture the decisions you must make so that Lumeon can configure the Healthcode functionality to your requirements. See *Configuration requirements (page 4)*.
2. Act as a guide to ensure you set up Lumeon Conductor correctly to enable Healthcode functionality. See *Healthcode set up (page 5)*.
3. Explain how to use the Healthcode functionality in Lumeon Conductor. See *How to use Healthcode in Conductor (page 12)*.
4. Provide details of the configuration options. See *Healthcode configuration (page 15)*.

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Configuration requirements

If your organization already uses Healthcode, you must provide Lumeon with the following details so that we can configure Lumeon Conductor to your requirements:

Information	Description
Healthcode setting codes	Setting codes that you want to assign to products. This product setting code is used in the invoices in the Healthcode claims file. Values you may want to use include: • D - Day patient • I - Inpatient • O - Outpatient • V - Consultant The **Any** setting is automatically available. If you assign **Any** to a product, any setting code is valid for it.
Default Healthcode setting code	From the list of valid setting codes, specify which setting code you want to use as the default. Conductor uses this default setting code if it is missing for a product in the Healthcode claims file.
Default Healthcode diagnosis code	Specify the diagnosis code and scheme that you want to use as the default. Conductor uses the default diagnosis code and scheme if it is missing in the Healthcode claims file. For example, the diagnosis code may be `78000` and the scheme may be `ICD9`.
Earliest claim date	Earliest invoice creation date that is included in claim files. For example, a value of **2020-01-01** means that Conductor does not include invoices dated earlier than 1 January 2020 in the Healthcode claims file.
Practitioner reference number	Whether you want to use a practitioner's GMC number or the insurer's Healthcode reference in invoices in the Healthcode claim file.
Default practitioner reference number	Specify the practitioner reference number that you want to use the default. This is a a practitioner's GMC number or the insurer's Healthcode reference depending on which you have decided to use. Conductor uses this default practitioner reference number if it is missing in the Healthcode claims file.
Include procedures with zero value	Whether or not procedures with zero charges (£0) should be added to the Healthcode claim file.

Configuring and setting up Healthcode functionality can take a while, therefore we recommend that this is done well in advance of Lumeon Conductor going live.

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Healthcode set up

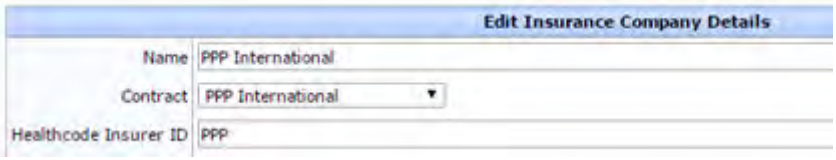
Once Lumeon has completed the configuration, you must carry out the following steps to set up Conductor to use Healthcode functionality.

Insurance companies

For all the insurance companies that you use Healthcode to process their invoices, you must ensure that they have a valid Healthcode insurer ID.

To add insurance companies:

1. Select **Insurance Companies** in the **People** menu.
2. Enter details in the **Create New Insurance Company** form for all required insurance companies.
3. Select the **Contract** and **Healthcode Insurer ID** for each insurance company. See the table below for a list of Healthcode insurer IDs.



If your insurance companies are already set up, ensure that they all have a valid Healthcode insurer ID.

Healthcode insurer IDs

The following table provides a list of valid Healthcode insurer IDs:

Insurance company	Healthcode insurer ID
Allianz Worldwide Care	AWC
Aviva	NUH
AXA-PPP	PPP
Bupa	BUP
Bupa International	BUI
Cigna	CIG
Exeter Family Friendly	EFS
Healix	HHS
Pruhealth	PRU
Simplyhealth	BCW
Standard Life Healthcare	SLH
WPA	WPA

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Healthcode billing sites

Healthcode billing sites enable you to group your locations together when you generate Healthcode claims files. Initially, you must set up the Healthcode billing site(s) for your organization and then assign them to your location(s).

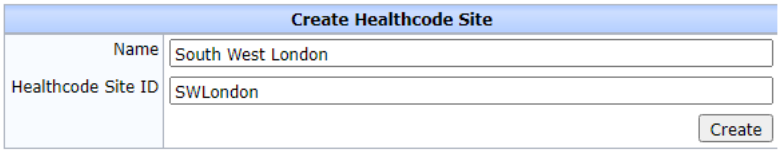
These Healthcode billing sites provide a drop-down menu in the **Healthcode Site Name** field in the **Add/Update Location** section of the **Room Management** page. See *Locations (page 6)*.

You can use the Healthcode billing site names in a number of ways:

- Assign a unique Healthcode billing site name to each location.
- Assign a Healthcode billing site name to a group of locations. For example, if you wanted to group all your locations in South West London together and all your locations in South East London together.
- Assign the same Healthcode billing site name to all your locations.

To create a Healthcode billing site:

1. Select **Healthcode Site Management** in the **Accounting** menu.
2. Enter the **Name** and **Healthcode Site ID** in the **Create Healthcode Site** form.



3. Click **Create**. Continue to enter all the Healthcode billing sites.

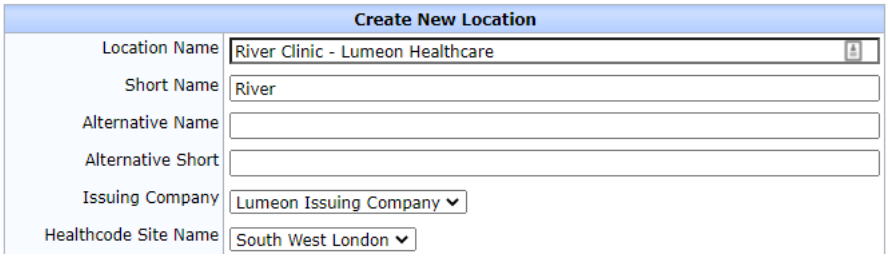
You must now update your locations with the correct Healthcode billing site. See *Locations (page 6)*.

Locations

After you have created the Healthcode billing sites, you must apply a Healthcode site name and Healthcode references to each location. You can obtain these values from Healthcode.

To add a Healthcode site name to a location:

1. Select **Locations** in the **Diary** menu and add each required location.
2. For each location, enter the correct Healthcode billing site in the **Healthcode Site Name** field. See *Healthcode billing sites (page 6)* for setting up Healthcode site names.

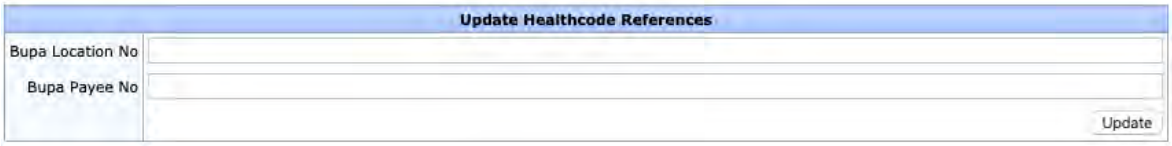


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3. Click **Create**. The location appears in the table of existing locations.

To add Healthcode references for each location:

1. After you have created the locations, select a location from the **Locations** list.
2. In the **Update Healthcode References** section, below the **Update Location** form, enter the location number and the payee number for each insurer, You can obtain these reference numbers from Healthcode or the health insurance companies.



3. Click **Update**.

Product codes

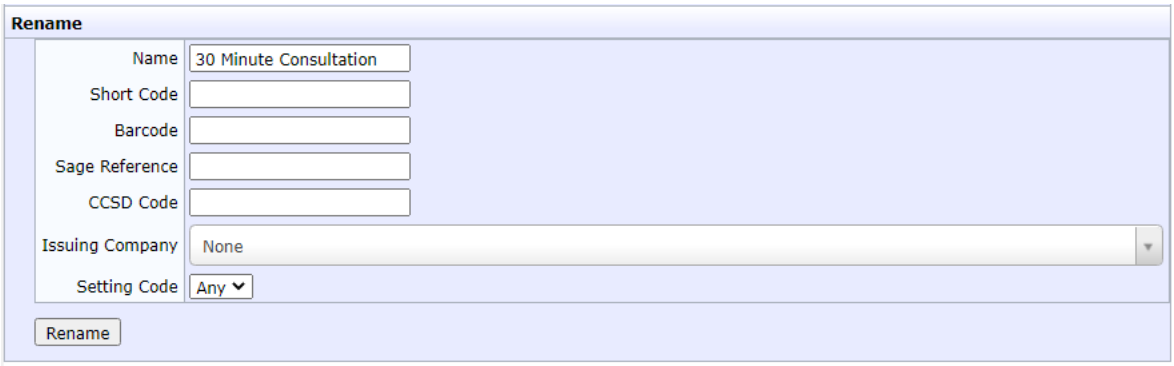
All products require a short code. Short codes are mapped by Healthcode to an industry standard code (ISC) which is then sent to the insurers. You need to forward short codes and their descriptions to Healthcode to ensure they can carry out the mapping. Products also require a setting code, and some surgical procedures have a CCSD (Clinical Coding and Schedule Development Group) code to ensure claims submitted to Healthcode are valid.

To create appointment types:

1. Select **Appointment Types** in the **Diary** menu and create the appointment types.
2. Add these appointments as products to the required contracts, by selecting **Wizards** menu in the **Products** menu, and then selecting **Add Product Wizard** in the **Wizards** menu.

Once the products have been created, you must update them with the appropriate codes. To do this:

1. Select **Products** in the **Products** menu to display the **Products** page.
2. Click and expand the **Products** folder and then the **Appointments** folder.
3. Select an appointment type and add the **Short Code** in the **Rename** section. The short code identifies this appointment type to Healthcode. The codes can be acquired from Healthcode, or you can define your own codes and inform Healthcode.



4. Some surgical procedures have a CCSD (Clinical Coding and Schedule Development Group) code. If required, you can add the **CCSD Code** to a product.

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5. Healthcode setting codes can be associated with products. Select a setting code from the drop-down list in the **Setting Code** field. The available setting codes depend on the core configuration settings for your organization. **Any** may be a valid option for products that are not setting-specific.
6. Click **Rename** to save the product codes.
7. Repeat this process with other non-appointment products and procedures.

When a claim is generated, the following codes are sent to Healthcode:

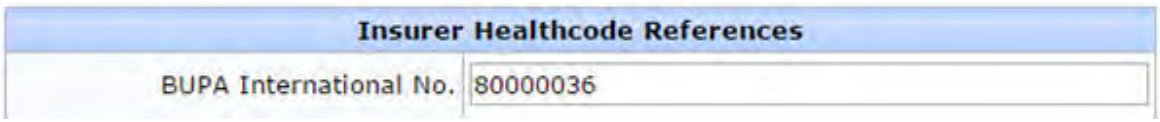
- Short code
- CCSD code, if present
- Setting code

Practitioner references

If your organization wants to charge appointments, products, or procedures, by an individual practitioner rather than a clinic, you must add the GMC number or the insurer Healthcode practitioner reference numbers for each practitioner. Whether Conductor uses the GMC number or the insurer Healthcode practitioner reference number in the Healthcode claims file depends on your core configuration setting.

To add practitioner Healthcode reference numbers:

1. Select **Practitioners** in the **People** menu.
2. Select a practitioner to display the **Practitioner Management** page.
3. Enter the practitioner's GMC number in the **GMC No** field.
4. In the **Insurer Healthcode References** section, enter the practitioner reference number for each insurance company.



5. Click **Save**.
6. Repeat for all practitioners.

Diagnosis codes

For some insurers, it is mandatory to include a diagnosis code when submitting an invoice. Each treatment cycle for any billing event, such as physiotherapy, must have a diagnosis code attached. You must enter these ICD-9 codes to indicate the diagnosis for the patient encounter. If an invoice is included in a Healthcode claims file for an appointment that is not linked to a diagnosis code, Conductor uses the default diagnosis code in the core configuration.

Please note, these diagnosis codes are different from the ***Read Codes*** used in the patient EMR (electronic medical record). It is not important whether or not your organization uses the diagnosis codes internally in Conductor.

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To enter diagnosis codes:

1. Select **Diagnosis Types** in the **Runtime Options** menu to display the **Diagnosis Types** page.

2. Create the diagnosis codes by entering the **Short Name** and **Full Name** and clicking **Create**. See *Valid diagnosis codes (page 9)*.



Valid diagnosis codes

The following table contains example codes that are acceptable to Healthcode. The `diagnosis_type_short_name` is uploaded to Healthcode, not the `diagnosis_type_name`.

diagnosis_type_short_name	diagnosis_type_name
72400	Lumbar Spine - Lumbar spine
72400	Thoracic Spine - Thoracic spine
72300	Cervical Spine - Cervical spine(Neck)
84000	Shoulder - Shoulder
84400	Knee - Knee
84300	Hip - Hip
71700	Knee - MCL
71700	Knee - ACL
84400	Knee - Anterior Knee pain
82600	Foot - Foot
72800	Hand - Hand
72800	Wrist - Wrist
71800	Elbow - Elbow
84500	Ankle - Ankle
84300	Thigh Muscle - Hamstring strain
84300	Thigh Muscle - Quadriceps strain
84400	Lower Leg Muscle - Calf muscle
72600	Ankle - Achilles Tendon
72900	RSI - RSI
72900	Chest - Fibromyalgia
84000	Chest - Hyperventilation
84400	Hamstring - Muscle strain - hamstring
81200	Upper Limb - Fracture (arm)
82300	Tibia - Fracture - tibia
78600	Chest - Chest
72800	Groin - Muscle strain - Groin
72800	Groin - Groin
71800	Knee - Meniscus
84800	Ankle - Achilles rupture
72400	Lumbar Spine - Sciatica
71700	Knee - Patello-femoral
84700	Cervical Spine - whiplash
72300	Cervical Spine - disc prolapse(Neck)
72300	Cervical Spine - Facet dysfunction(Neck)

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diagnosis_type_short_name	diagnosis_type_name
72300	Cervical Spine - Neural pain(neck)
72300	Cervical Spine - Spinal stenosis
72300	Cervical Spine - surgery(Neck)
84000	Shoulder - impingement(Shoulder)
84000	Shoulder - Painful arc
84000	Shoulder - subluxation(shoulder)
71800	Shoulder - dislocation(shoulder)
72600	Shoulder - Rotator cuff
84000	Shoulder - Labrum
72600	Shoulder - Biceps tendonitis
71500	Shoulder - Osteo-arthritis
81100	Shoulder - Fracture(Shoulder)
84000	Shoulder - surgery(shoulder)
84000	Scapula - instability(scapula)
81100	Scapula - Fracture(scapula)
84000	Scapula - maltracking(scapula)
84000	Upper Limb - Arm
84400	lower limb - Leg pain
71700	Knee - Knee Replacement
72800	Wrist - Scaphoid fracture
84000	Forearm - Forearm
72300	Cervical Spine - Central Pain
72300	Cervical Spine - Neural Pain
84000	Upper Limb - Deltoid
84000	Upper Limb - Tricep
84000	Upper Limb - Bicep
72400	Lumbar Spine - Lumbar fracture
72400	Lumbar Spine - Lumbar Central Pain
72200	Lumbar Spine - Lumbar Prolapsed Disk
72400	Lumbar Spine - Lumbar Referring Pain
72400	Lumbar Spine - Spondylolosthesis
72400	Lumbar Spine - Lumbar Surgery
72400	Pelvis - Pelvic fracture
72400	Pelvis - Sacro-iliac
72400	Pelvis - Pelvic Hypermobility
72400	Pelvis - Pelvic Hypomobility
72400	Pelvis - Pubic symphesis
84300	Hip - Hip displagia
84300	Hip - Hip Replacement
84300	Hip - Hip Fracture
84300	Hip - Trendelenburg Gate
71800	Jaw - Jaw
84400	Shin - Shin Splints
78900	Abdominal - Abdomen
73500	Toes - Toe
72800	Hand - Finger
84400	Lower limb - ITB
82000	Lower limb - Fracture - Femur
72400	Pelvis - Pelvis
84000	Chest - Clavicle
84800	Gluteus

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diagnosis_type_short_name	diagnosis_type_name
84400	Lower Limbs
78000	Vertigo
72800	Facial
84300	Thigh
72400	Coccyx
72600	Heel
61800	Pelvic Prolapse
78400	Headache
85200	Stroke-muscle weakness
35100	Bells Palsy
85200	Neurological - Stroke
72800	Trunk muscle - Muscle-trunk
84000	Upper Limb - Muscle-upper limb
84400	Lower limb - Muscle-lower limb
78100	Neurological - Parkinson's Disease
71400	Rheumatoid Arthritis
72400	Scoliosis
72800	Finger
84400	Osgood Schlatters
84700	Rib
78400	Cervical spine - headache
78100	Multiple Sclerosis

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How to use Healthcode in Conductor

This section explains:

- The steps you must take when you book an appointment to ensure that the Healthcode claims file contains the correct information - see *Appointments (page 12)*.
- How to generate a Healthcode claims file - see *Claims (page 13)*.
- How to import a Healthcode remittances file - see *Remittances (page 14)*.

Appointments

If you are integrating with Healthcode, when you have an appointment that has a charge to an insurer, you can link it to an ICD-9 diagnosis code. You can do this either in the treatment cycle or in the appointment itself.

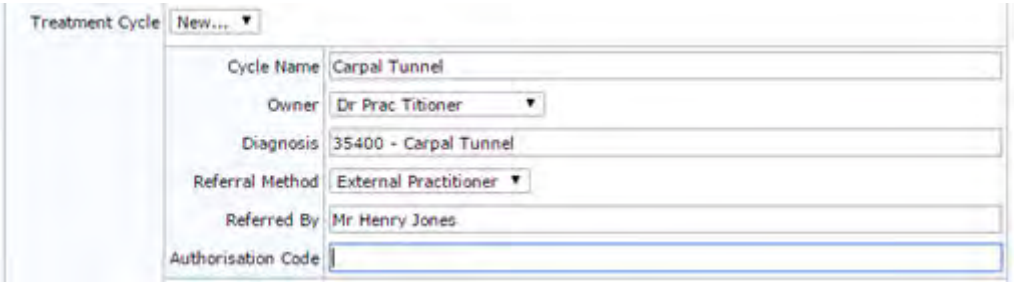
If you are integrating with Healthcode, when you have an appointment that has a charge to an insurer, you can link it to an ICD-9 diagnosis code. You can add the diagnosis code either in the treatment cycle or in the appointment itself. If you do not add a diagnosis code, Conductor uses the default diagnosis code set up in the core configuration.

Link a treatment cycle to a diagnosis code

When you book an appointment for a patient that is linked to a treatment cycle, you can enter the ICD-9 diagnosis code at the time of booking.

To link a treatment cycle to a diagnosis code:

1. Book the appointment in the diary.
2. Click **New** to display the treatment cycle details.
3. Complete the treatment cycle details in the **Appointment Details** page and include the ICD-9 diagnosis code in the **Diagnosis** field. This is an autocomplete field - start typing the name of the diagnosis code and a list of codes that match the entered text is displayed. Select the required diagnosis code.



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If an appointment is not linked to a treatment cycle at the time of booking, an administrator or practitioner can do it later. To do this:

1. Select the appointment in the diary or in the **Appointments & Classes** option in the **Patient** menu of the patient details. The **Appointment Details** page is displayed.

2. Enter the ICD-9 diagnosis code in the **T/C Diagnosis** field. This is an autocomplete field - start typing the name of the diagnosis code in the and a list of codes that match the entered text is displayed. Select the required diagnosis code.

Link an appointment to a diagnosis code

An appointment cannot be linked to an ICD-9 diagnosis code until after the time of booking. This is because the diagnosis is often not known at the time of booking. A practitioner or an administrator can add a diagnosis code. To do this:

1. Select the appointment in the diary or in the **Appointments & Classes** option in the **Patient** menu of the patient details. The **Appointment Details** page is displayed.

2. Select the ICD-9 diagnosis code from the drop-down list in the **Diagnosis Code** field.

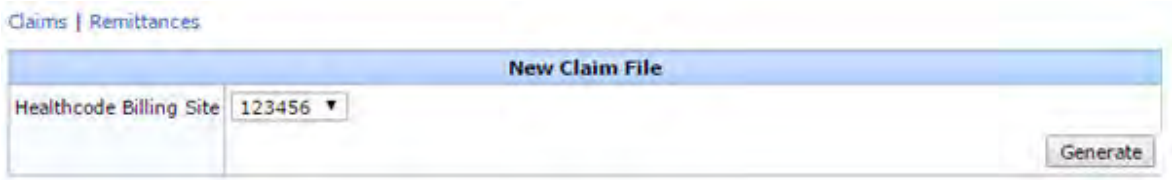


Claims

In order to bill electronically, an XML Healthcode Claim file must be generated and then uploaded to Healthcode's VEDA system. When invoices are generated, they are sent to a queue for Healthcode. When you are ready to send your invoices to Healthcode, you can generate the XML file using Lumeon Conductor, and then upload the file manually to Healthcode.

To generate a claims file:

1. Select **Healthcode** in the **Accounting** menu. The **Healthcode Claims** page is displayed.



2. Select the Healthcode billing site from the drop-down list and click **Generate**. to create a claims file. Conductor generates a claim file of invoices for all locations with that Healthcode billing site. This file displays in the list of claim files below, along with a history of claim files which have previously been generated.

3. You can click **Download** to download the claims file. The claims file is in CSV format and you can view it in a spreadsheet application, such as Microsoft Excel.

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Claims validation

Conductor performs validation on the claim file.

If an invoice has conflicting setting codes for the products within it, for example, one O and two D's, the claim creation will fail. See *Product codes (page 7)*.

Remittances

When a payment is made, some (but not all) insurers send a remittance file to Healthcode. You can log into Healthcode, process and download the files and then upload these files into Lumeon Conductor.

This process then allocates the payments to the invoices. In the case of shortfalls or errors, Conductor can generate a file containing the details of the failed invoice that enables you to investigate and verify the problem.

To process remittances:

1. Select **Healthcode** in the **Accounting** menu and select the **Remittances** option in the top left corner of the screen. The **Healthcode Remittances** page is displayed.



2. Use **Choose file** to select the remittances file that you want to upload.

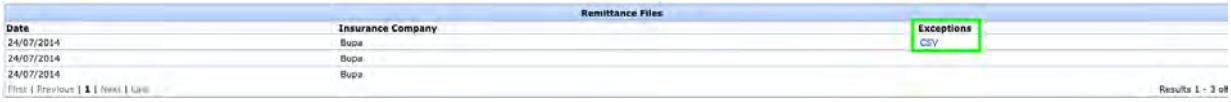
3. Click **Upload**. A list of remittance files is displayed.

Processing errors

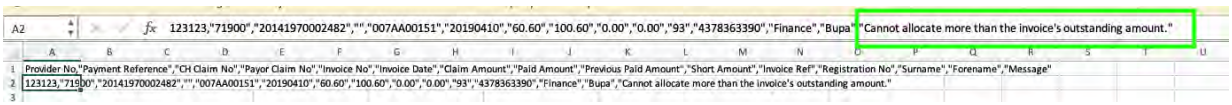
If there are any errors importing the remittances file, you will see an error message at the top of the **Remittances** page. For example:

> There are not sufficient funds to make that allocation (Invoice: 32425)

If processing errors occur, you can click **CSV** next to the remittance with the error.



This downloads a CSV file containing details of the remittance and the error. You can view the CSV file in a spreadsheet application, such as Microsoft Excel.



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Healthcode configuration

To enable Healthcode functionality in Conductor, the following configuration tasks must be undertaken:

- **Core configuration** - This is performed by Lumeon Support. See *Core configuration (page 15)*.
- **Healthcode configuration settings** - This is usually performed by Lumeon Support. See *Healthcode configuration settings (page 16)*.
- **Security points** - Initial configuration is usually performed by Lumeon Support but system administrators can update these settings. See *Security points (page 18)*.

Core configuration

Lumeon has access to core configuration settings which can enable or disable Conductor functionality. Contact Lumeon Support if you want to change your organization's access to this functionality.

The following core configuration settings control access to Healthcode functionality:

Name	Description
`AvailableSettingCodes`	An array of Healthcode setting codes that can be assigned to products. Valid values are: · Any - Any setting code is valid for the selected product. · D - Day patient · I - Inpatient · O - Outpatient · V - Consultant For example, to provide options **O**, **D**, and **Any** in the drop-down list in the **Setting Code** field in the **Rename** section of the **Products** page (see *Product codes (page 7)*): `$CORE_CONFIG['AvailableSettingCodes'] = array('O', 'D');`
`EnableIssuingCompanies`	Whether Conductor uses issuing company functionality. This enables Conductor to issue invoices from more than one entity within your organization. This affects the invoice numbers used in the Healthcode claims file. Valid values are: · `True` - Issuing companies are enabled. Conductor uses external invoice numbers in the Healthcode claims file. · `False` - Issuing companies are disabled. Conductor uses internal invoice numbers in the Healthcode claims file.
`EnableProcedureCodesPricing`	Enables pricing based on a procedure within a product, rather than pricing based on the product itself.

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Name	Description
`HealthcodeDefaultClaimsGenerationCode`	Healthcode default claims generation setting. This value is used if the setting code in the Healthcode claims file is missing. Valid values are: · D - Day patient · I - Inpatient · O - Outpatient · V - Consultant
`HealthcodeDefaultDiagnosisCode`	Default Healthcode diagnosis code, consisting of the diagnosis code and scheme. For example: `$CORE_CONFIG['HealthcodeDefaultDiagnosisCode'] = [ 'code' => '78000', 'scheme' => 'ICD9' ];` The default diagnosis code and scheme values are used if they are missing in the claims file. They are mapped within the Healthcode HC VEDA system. See *Diagnosis codes (page 8)*.
`HealthcodeEarliestClaimDate`	Earliest invoice creation date that is included in claim files. For example, a value of **2020-01-01** means that Conductor does not include invoices dated earlier than 1 January 2020 in the Healthcode claims file.
`HealthcodeFallBackControllingSpecialistGenericCode`	Default code used for the controlling practitioner in the Healthcode claims and remittances files. Depending on the setting of `HeathcodeUseControllingPractitionerGMCNumber`, this value is used if the practitioner's GMC code or the insurer Healthcode reference is empty.
`HEALTHCODE_INCLUDE_ZERO_VALUE_PROCEDURES`	Whether or not procedures with zero charges (£0) should be added to the Healthcode claim file. Valid values are: · `True` - Include procedures with zero charges. · `False` - Exclude procedures with zero charges.
`HealthcodeUseControllingPractitionerGMCNumber`	Whether Conductor uses the controlling practitioner's GMC number or the insurer's Healthcode reference in invoices in the Healthcode claims file. Valid values are: · `True` - Use the GMC number for the controlling practitioner. · `False` - Use the appropriate insurer Healthcode reference for the controlling practitioner. See *Practitioner references (page 8)*.

Healthcode configuration settings

System administrators and Lumeon Support have access to Healthcode configuration settings. You can use this page to define a number of file directories, and a default payment location. You can also set the Healthcode functionality to be in test or live mode.

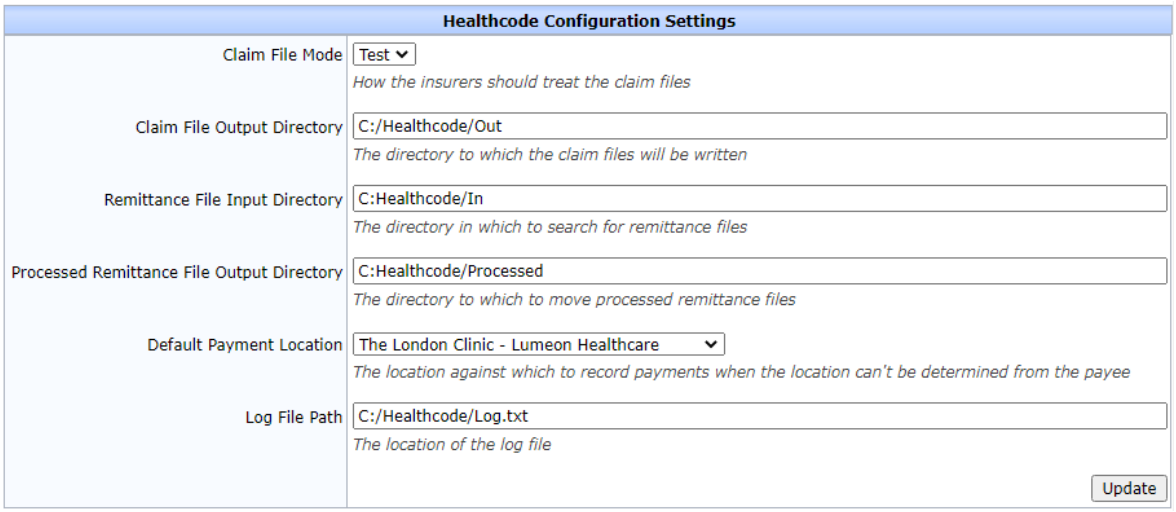
Normally, Lumeon configures these settings.

To set the Healthcode configuration settings:

1. Select **System Configuration** in the **System Configuration** menu.

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2. In the **Healthcode Configuration Settings** section, complete the fields according to the table below.



Healthcode configuration setting fields

Complete the Healthcode configuration settings according to the table below:

Field name	Description
Claim File Mode	Select the required mode for the Healthcode claim file functionality. Valid options are: · **Test** - Select if you are testing the Healthcode functionality and do not want the claims file to be uploaded to Healthcode. · **Live** - Select when you are using Healthcode functionality to generate claims files and process remittances files.
Claim File Output Directory	Enter the full path of the directory where you want Conductor to output the claims files. For example: `C:/Healthcode/Out`
Remittance File Input Directory	Enter the full path of the directory where you want Conductor to look for remittances files for processing. For example: `C:/Healthcode/In`
Processed Remittance File Output Directory	Enter the full path of the directory where you want Conductor to put the claims files after Conductor has processed them. For example: `C:/Healthcode/ProcessedRemittances`
Default Payment Location	Select the location from the drop-down list that you want Conductor to use, when processing claims files, if the location is missing.
Log File Path	Enter the full path of the directory and file name of the log file that you want Conductor to use for the log files it generates. For example: `C:/Healthcode/Log.txt`

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Security points

System administrators and Lumeon Support have access to security point settings which can enable or disable visibility of Conductor functionality for other users.

Lumeon usually performs initial configuration of security points but system administrators can update these settings.

If Healthcode core configuration is enabled, the following security points control access to Healthcode functionality:

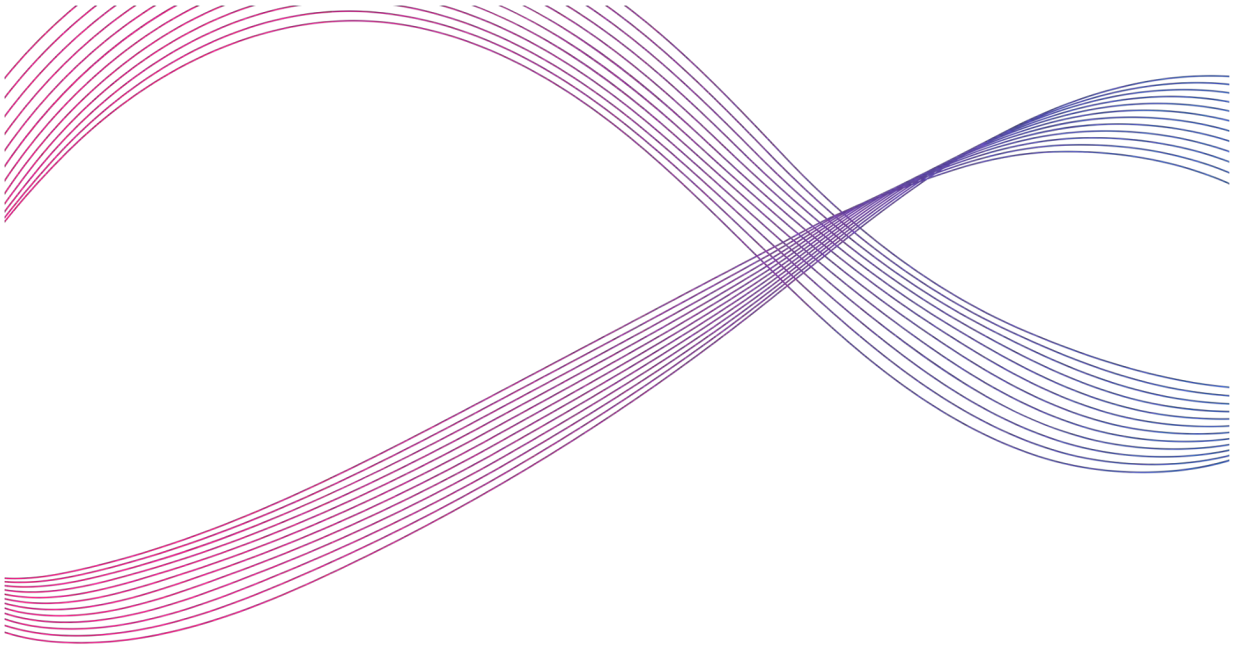
Security point	Description
`Accounting.Healthcode`	**Can View** - Controls access to the **Healthcode** option in the **Accounting** menu.
`Accounting.HealthcodeBillingSites`	**Can View** - Controls access to the **Healthcode Sites Management** option in the **Accounting** menu and the **Healthcode Site Management** page. **Can Add** - Users can add Healthcode sites on the **Healthcode Site Management** page. **Can Edit** - Users can edit Healthcode sites on the **Healthcode Site Management** page. **Can Cancel** - Users can cancel Healthcode sites on the **Healthcode Site Management** page. These Healthcode billing sites provide a drop-down menu in the **Healthcode Site Name** field in the **Add/Update Location** section of the **Room Management** page. See *Locations (page 6)*.
`Accounting.Healthcode.Remittance`	**Can View** - Controls access to the exception files generated on the **Healthcode Remittances** page.
`Healthcode.ClaimsAllSites`	Allows users to view and submit Healthcode claims for all locations, not just their own.

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Glossary

Healthcode	An electronic invoice clearing service that enables private healthcare providers to send invoices to insurers for processing and payment. The clearing service validates invoices to ensure they are complete and correct, and then forwards them securely to the relevant private medical insurance (PMI) company. Healthcode's clearing service runs on a cloud-based application called HC VEDA (Virtual Electronic Data Application). See *https://www.healthcode.co.uk/* and *https://www.healthcode.co.uk/medical-billing/hc-veda* for more information.
Read Codes	A thesaurus of clinical terms. Superseded by ***SNOMED CT***. See *https://digital.nhs.uk/services/terminology-and-classifications/read-codes* for more information.

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HTML Template Management in Lumeon Conductor 24.2

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Introduction

The HTML template management page provides centralized facilities for creating, editing, and previewing the following HTML templates:

- Activity operator templates
- Case state operator templates
- Form layout templates
- Email templates

It displays separate tabs for each of these templates.

Activity and case state operator templates

Activity and case state operator templates enable you to associate templates with a pathway. Activity operator templates are associated with an activity type which is used by a pathway. Case state operator templates are associated with individual case states within a pathway. An operator can see the templates when they view a patient who is on a pathway associated with that activity type and containing those case states. Operators can see the activity operator template(s) in the patient view for the whole time that the patient is on the pathway. They can see a case state operator template when the patient is in that case state.

Activity operator templates may provide patient demographics and previous responses to forms whereas case state operator templates could provide a call script for an initial phone call to confirm an appointment or a follow-up call to remind the patient again about their appointment.

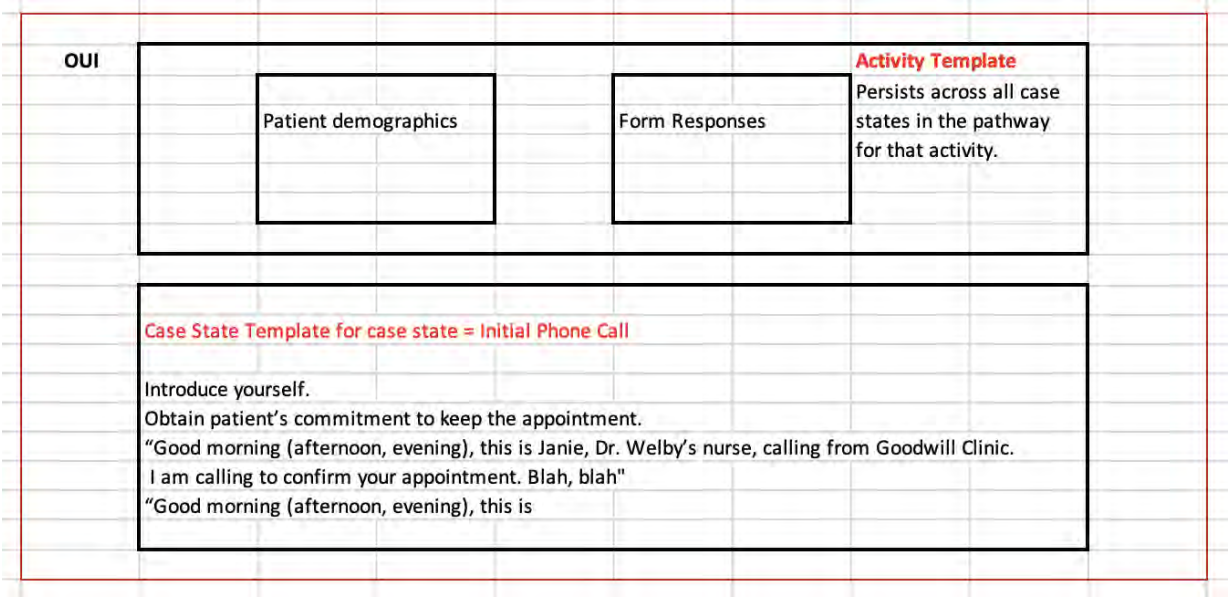
Example

For example, a pathway has the following three activity and case state operator templates associated with it:

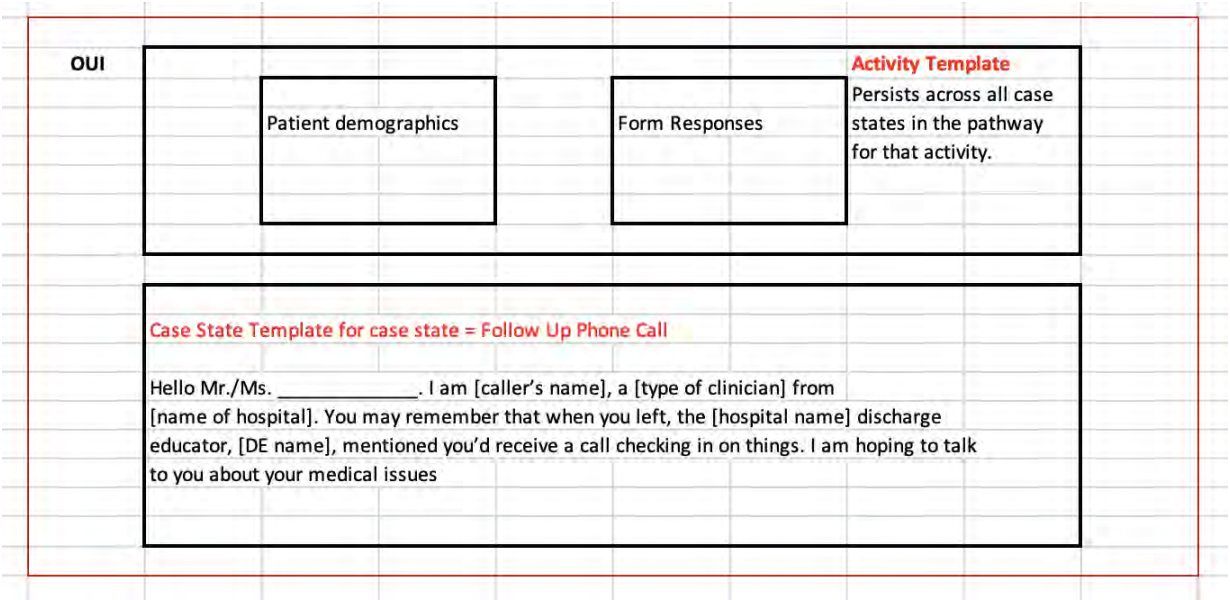
- Activity operator template providing patient demographics and form responses for the whole time that the patient is on the pathway.
- Case state operator template providing a call script or prompts for an initial phone call to confirm an appointment.
- Case state operator template providing a call script or prompts for a follow-up phone call to remind the patient about their appointment.

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When a patient is placed on the pathway, an operator can see the patient demographics and previous form responses from the activity operator template throughout the time that the patient remains on the pathway. A case state near the beginning of the pathway has a case state operator template associated with it. This template provides a call script for the phone call that the operator makes to the patient confirming their appointment. This case state operator template is only available when the patient is in this case state.



An operator can see the patient demographics and previous form responses from the activity operator template all the time as the patient progresses along the pathway. A case state later in the pathway has another case state operator template associated with it. This template provides a call script for the phone call that the operator makes to the patient reminding them of their appointment. Again, this case state operator template is only available when the patient is on this case state.



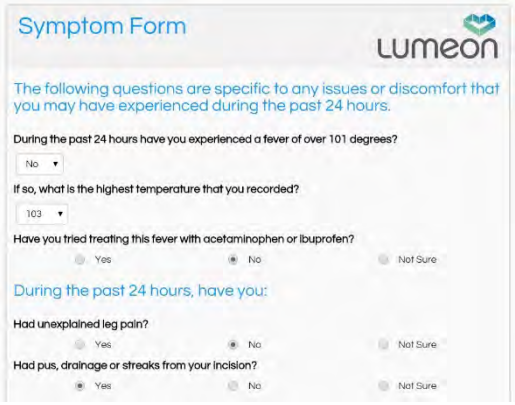
See ***Pathways in Lumeon Conductor*** for more information about pathways.

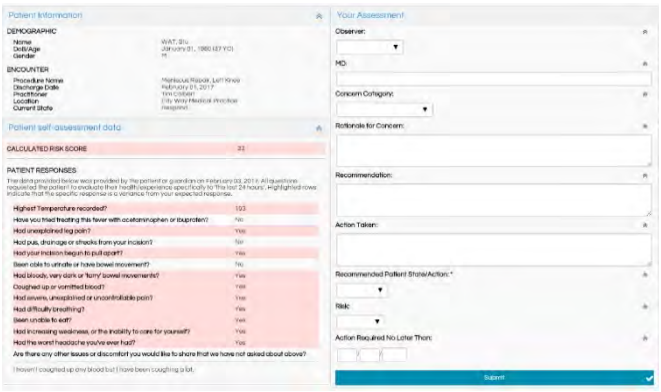
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Form layout templates

You can apply custom layouts to clinical forms using the CSS and HTML in a form layout template.

You can use Twig tags in the HTML section to access patient data and historic form responses for display purposes. You can also use Twig logic to control the conditional display of information. For example, you can highlight previous responses to questions or only show data that exceeds certain values. The defined CSS is applied to the Twig template allowing you to customize the look and feel of a form. Examples of custom form layouts are:





Email templates

You can set up a range of emails to be used for appointment confirmations, reminders, promotions, and so on. For example, you can send emails to:

- Patients confirming an appointment when it is booked, or reminding them about it a few days before.
- Practitioners informing them of test results for a patient.
- External practitioners informing of the progress of a patient that they referred to you.
- Care team members about actions that they must take for a patient.
- Administrators about tasks that have been assigned to them.
- Conductor users informing them that their password has expired.

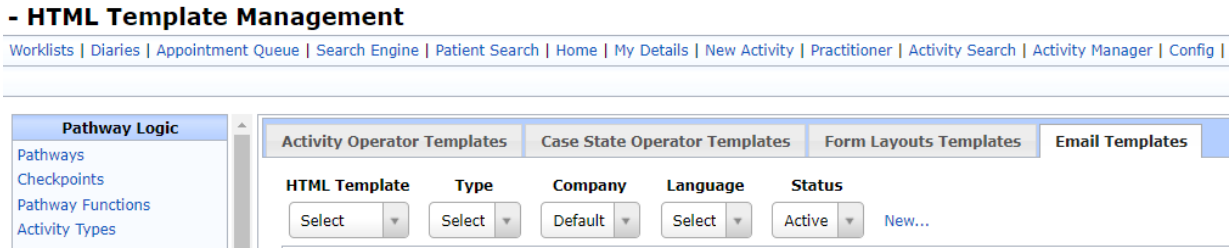
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You can also configure emails to contain different attachments depending on location, appointment type, payor, or company. For example, you could include a location map.

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HTML template management

You can use the **HTML Template Management** page to view, edit, and activate existing templates, and create new templates.



Each tab displays a list of available templates. You can filter the list of templates using the options displayed, or you can sort them by clicking the column headers. The filtering and sorting options displayed for each tab may be different.

To display or edit a template, select the template name from the list on the appropriate tab.

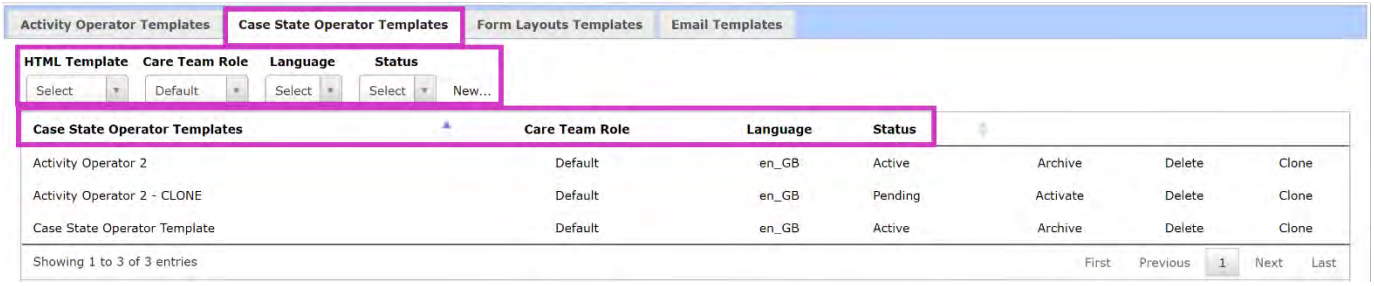
Activity operator templates

You can create activity operator templates and associate them with activity types.



Case state operator templates

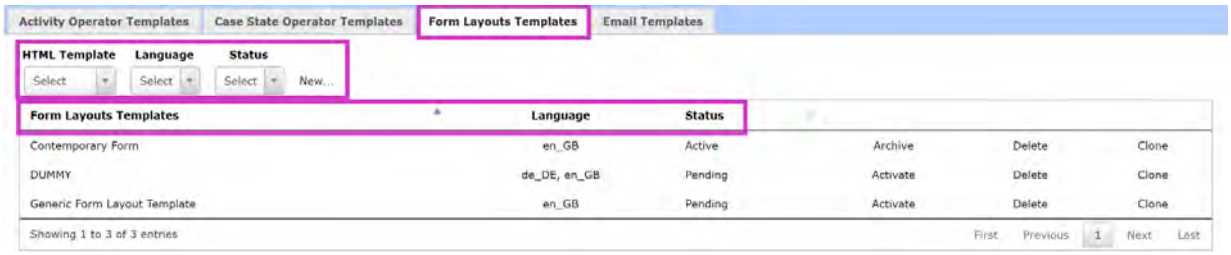
You can create case state operator templates and associate them with individual case states in pathways.



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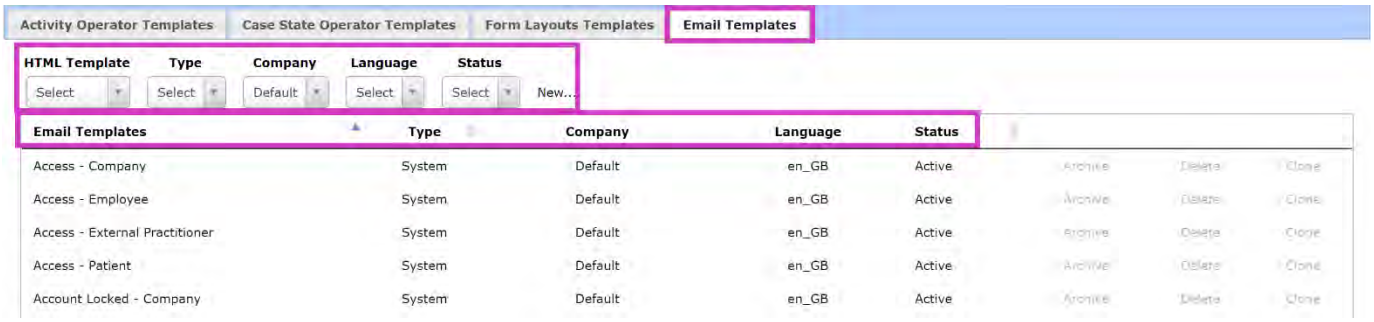
Form layout templates

You can create form layout templates to customize forms for your organization, or for individual companies or insurers. For example, to enable the form to incorporate your organization's, a company's or an insurer's corporate branding.



Email templates

You can create email templates and use them to send emails to patients, practitioners, external practitioners, and other Conductor users.



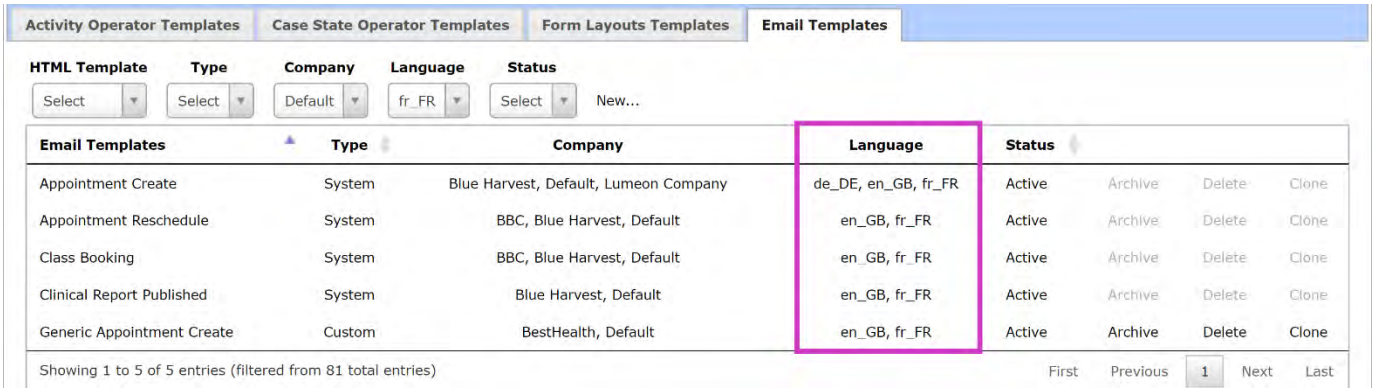
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Common features of HTML templates

Languages

The **Language** column displays for all template types (activity operator templates, case state operator templates, form layout templates, and email templates), and shows the languages used for each template.

If multiple language variations are present on a single template, or have been applied across different versions of the same template, the **Language** column indicates all the languages used.

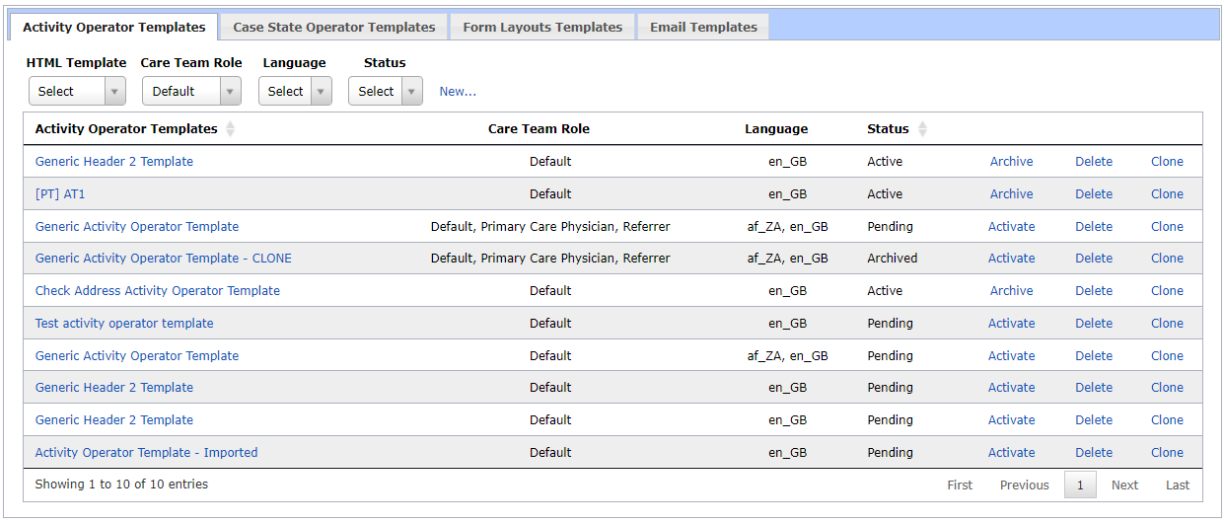


Status

The **Status** column indicates the status of each template:

- Active
- Pending
- Archived

When you create a new template, its status is **Pending**. Also, every time you edit or update a template, the status changes to **Pending**.

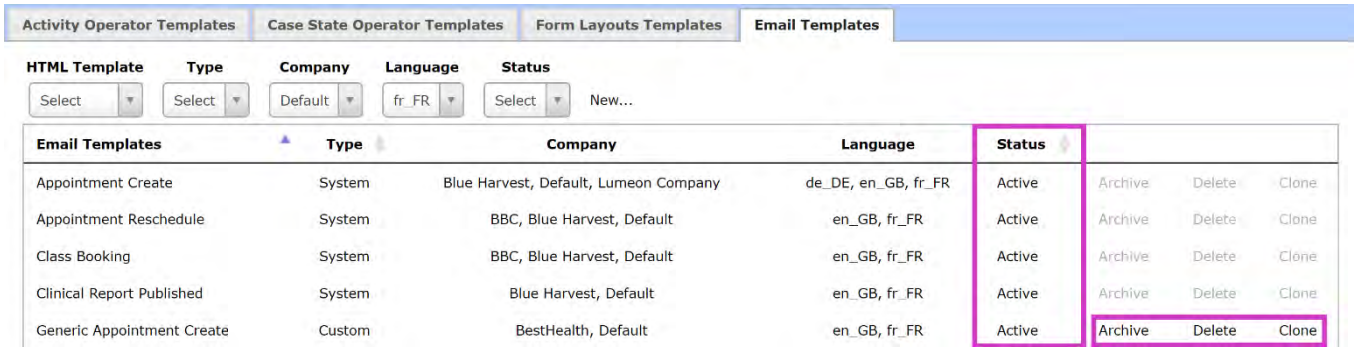


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Actions

You must activate a template before you can use it. To do this, click **Activate**, and the status changes to **Active**.

If a template is active, you can archive it. This changes its status to **Archived**. You can then activate it again by clicking **Activate**.



Clicking **Delete** permanently removes the template without a warning message.

You can clone custom email templates. To do this, click **Clone** to create a duplicate template. The copy of the template has the word **CLONE** appended to the template name. You can then change its name and the HTML content of the template.

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Create and use HTML templates

Activity operator templates

You can create a default activity operator template or you can create different templates for each care team role.

Create an activity operator template

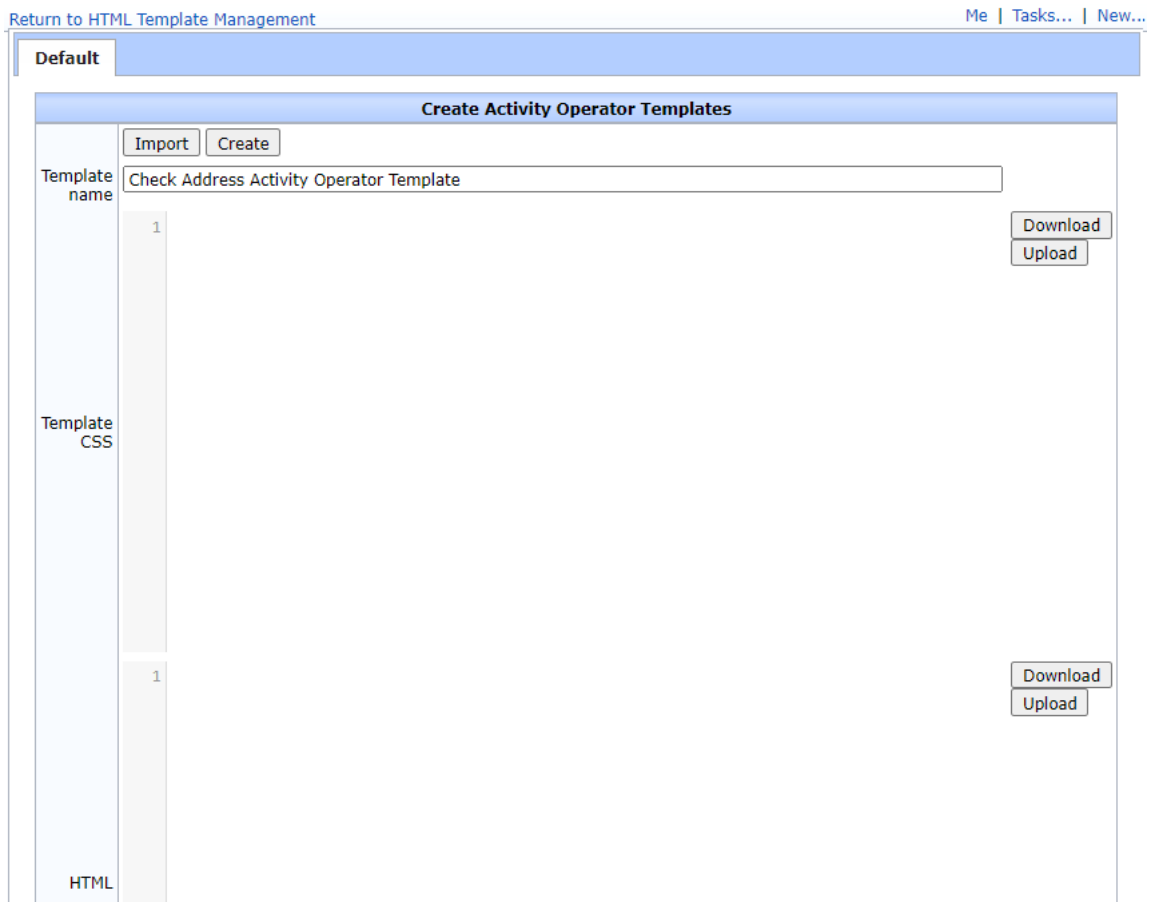
To create an activity operator template:

1. Select the **Activity Operator Template** tab on the **HTML Template Management** page.
2. If you want to create a template for a specific care team role, select the appropriate value in the drop-down list in the **Care Team Role** field. Otherwise, select **Default** to create a generic template.
3. Click **New...** to display the **Create Activity Operator Template** page. If you have templates for more than one care team role, tabs across the top are displayed for each role.



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4. Enter the name of the template.



5. You can enter the CSS and HTML directly into the fields in this window, or use one of the following options. Template content is in JSON format.

   - **Download** - Download the CSS or HTML elements separately so that you can edit them outside Conductor. You may find it useful to download the CSS or HTML prior to making changes so that you have a record of it and can restore it to the original version, if necessary.

   - **Upload** - Upload the CSS or the HTML separately into the template after you have created or edited them outside Conductor.

   - **Copy and paste** - If you have created or edited the CSS or HTML elements, or translations, outside Conductor, you can use standard copy and paste commands to copy them into the template.

   - **Export** - You can export a file containing the existing CSS, HTML, and translations, so that you can import it into another new template. This is also useful for copying templates between different deployments of Conductor.

   - **Import** - In a new template, you can import the CSS, HTML and translations from a template that you have exported from Conductor. This is also useful for copying templates between different deployments of Conductor.

6. If multiple languages are configured for your organization, you can include translations - see *Translations (page 13)*.

7. You can preview the template - see *Preview (page 14)*.

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8. When you have finished, click **Create**.

9. Click **Return to HTML Template Management** at the top left hand side of the page.

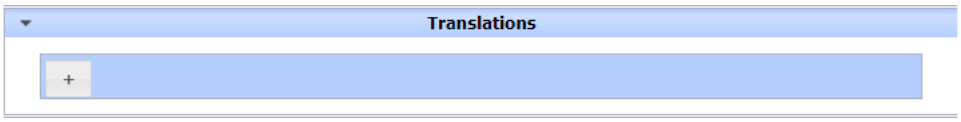


10. Find the new template in the list and click **Activate**. To make it easier to find the template, you can select **Pending** from the drop-down list in the **Status** field to display pending templates only. You cannot use the template until its status is **Active**.

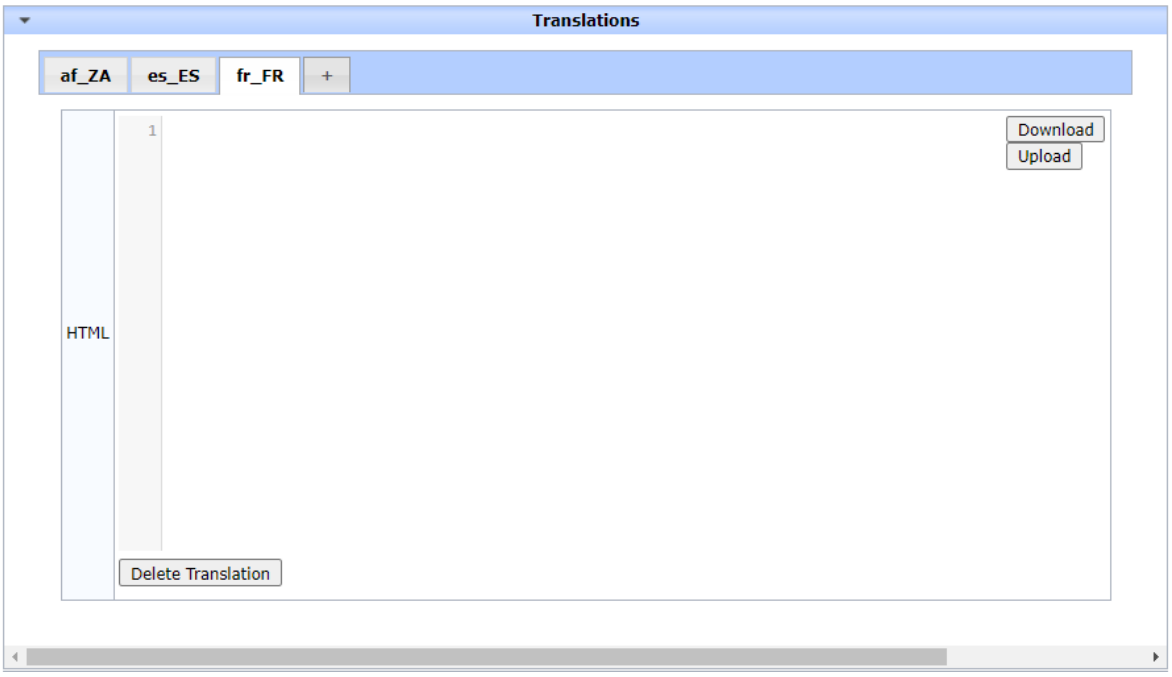
Translations

If multi-language configuration is enabled, you can create language translations for each template and any template variations. To do so:

1. Click on the **Translations** bar to expand or shrink the section.



2. Click the **+** tab and select from the available language options to create new language variants for the template.



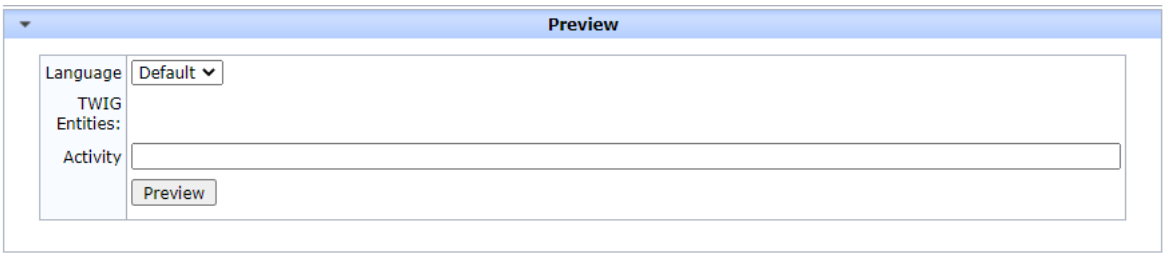
You can remove a translation by clicking **Delete Translation**.

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Preview

You can see what the template looks like. To do so:

1. Click on the **Preview** bar to expand or shrink the section.



2. Leave the **Language** field as **Default** or select the language that you want to preview from the drop-down list.
3. Depending on the template type, you can enter Twig entities in the appropriate fields to provide a more accurate visual representation of the generated template.
4. Click **Preview** to display a preview of the template in a pop-up window.

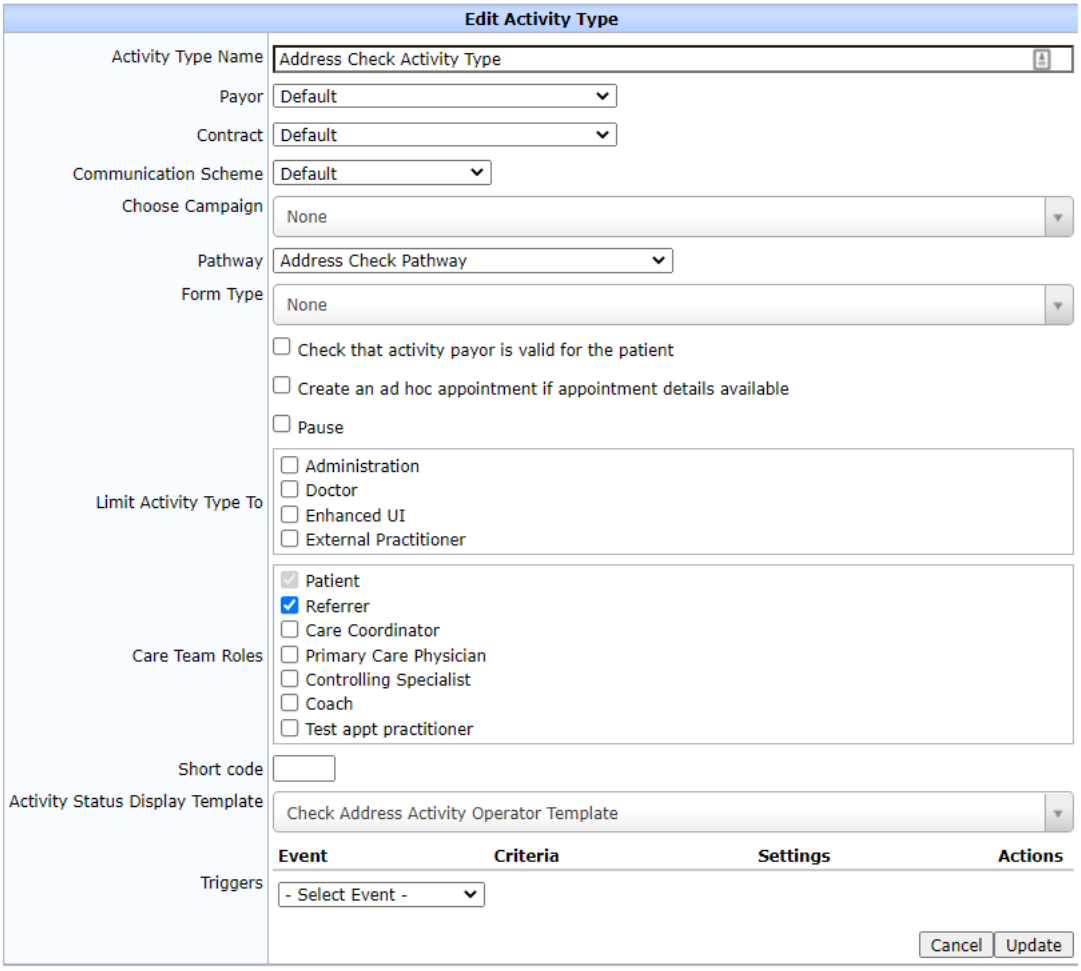
Add the activity operator template to an activity type

To add the activity operator template to an activity type:

1. Select **Activity Types** in the **Pathway Logic** menu.

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2. If the activity type already exists, select it in the list of **Activity Types** to display the details in the **Edit Activity Type** section. If it is a new activity type, enter the details in the **Create Activity Type** section.



3. Select the appropriate activity operator template from the drop-down list in the **Activity Status Display Template** field. If you cannot see the required template, ensure that you have activated it in the **HTML Template Management** page.

4. Click **Create** if you have added a new activity type or **Update** if you have edited an existing activity type.

Case state operator templates

You can create a default case state template or you can create different case state templates for each care team role.

Create a case state operator template

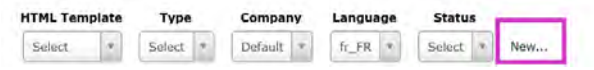
To create a case state operator template:

1. Select the **Case State Operator Template** tab on the **HTML Template Management** page.

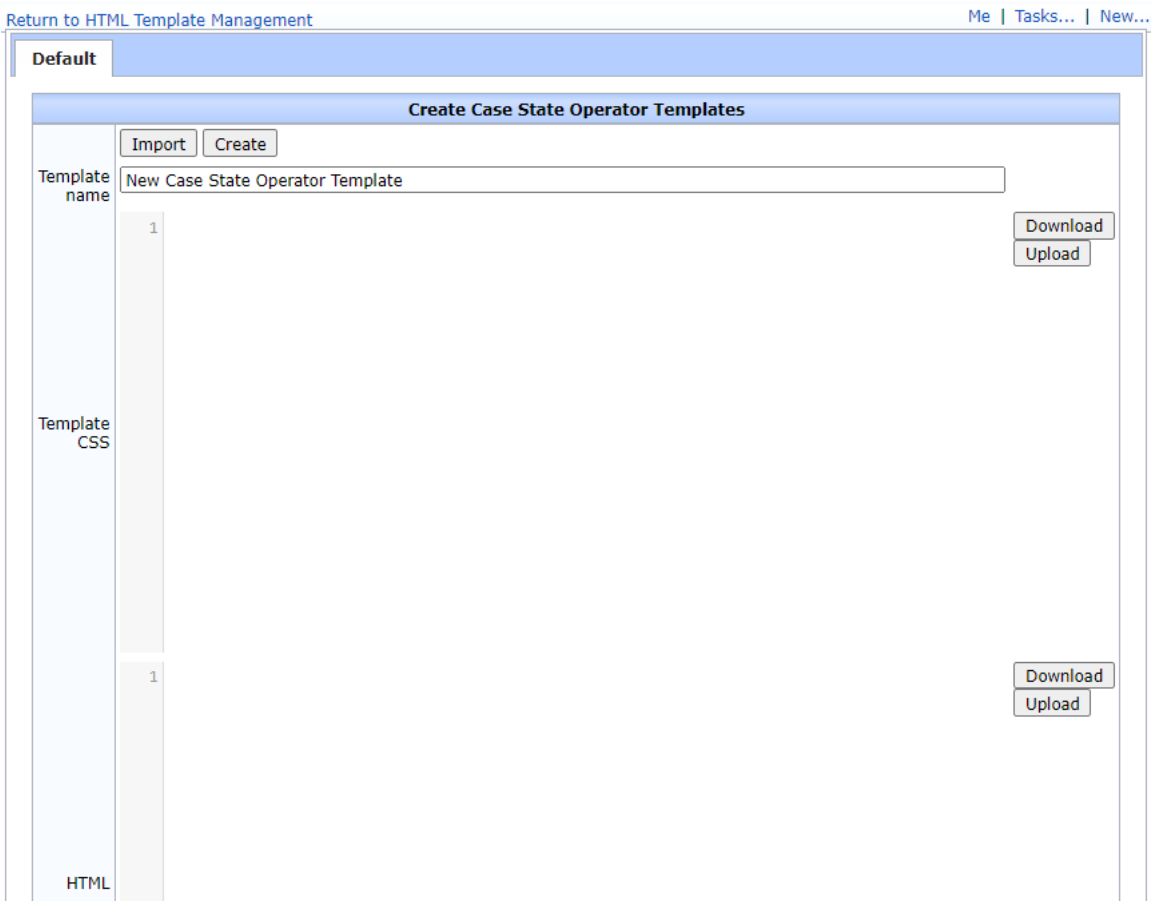
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2. If you want to create a template for a specific care team role, select the appropriate value in the drop-down list in the **Care Team Role** field. Otherwise, select **Default** to create a generic template.

3. Click **New...** to display the **Case State Operator Template** page. If you have templates for more than one care team role, tabs across the top are displayed for each role.



4. Enter the name of the template.



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5. You can enter the CSS and HTML directly into the fields in this window, or use one of the following options. Template content is in JSON format.
   - **Download** - Download the CSS or HTML elements separately so that you can edit them outside Conductor. You may find it useful to download the CSS or HTML prior to making changes so that you have a record of it and can restore it to the original version, if necessary.
   - **Upload** - Upload the CSS or the HTML separately into the template after you have created or edited them outside Conductor.
   - **Copy and paste** - If you have created or edited the CSS or HTML elements, or translations, outside Conductor, you can use standard copy and paste commands to copy them into the template.
   - **Export** - You can export a file containing the existing CSS, HTML, and translations, so that you can import it into another new template. This is also useful for copying templates between different deployments of Conductor.
   - **Import** - In a new template, you can import the CSS, HTML and translations from a template that you have exported from Conductor. This is also useful for copying templates between different deployments of Conductor.
6. If multiple languages are configured for your organization, you can include translations - see *Translations (page 13)*.
7. You can preview the template - see *Preview (page 14)*.
8. When you have finished, click **Create**.
9. Click **Return to HTML Template Management** at the top left hand side of the page.

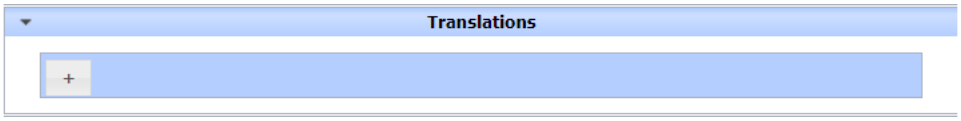


10. Find the new template in the list and click **Activate**. To make it easier to find the template, you can select **Pending** from the drop-down list in the **Status** field to display pending templates only. You cannot use the template until its status is **Active**.

Translations

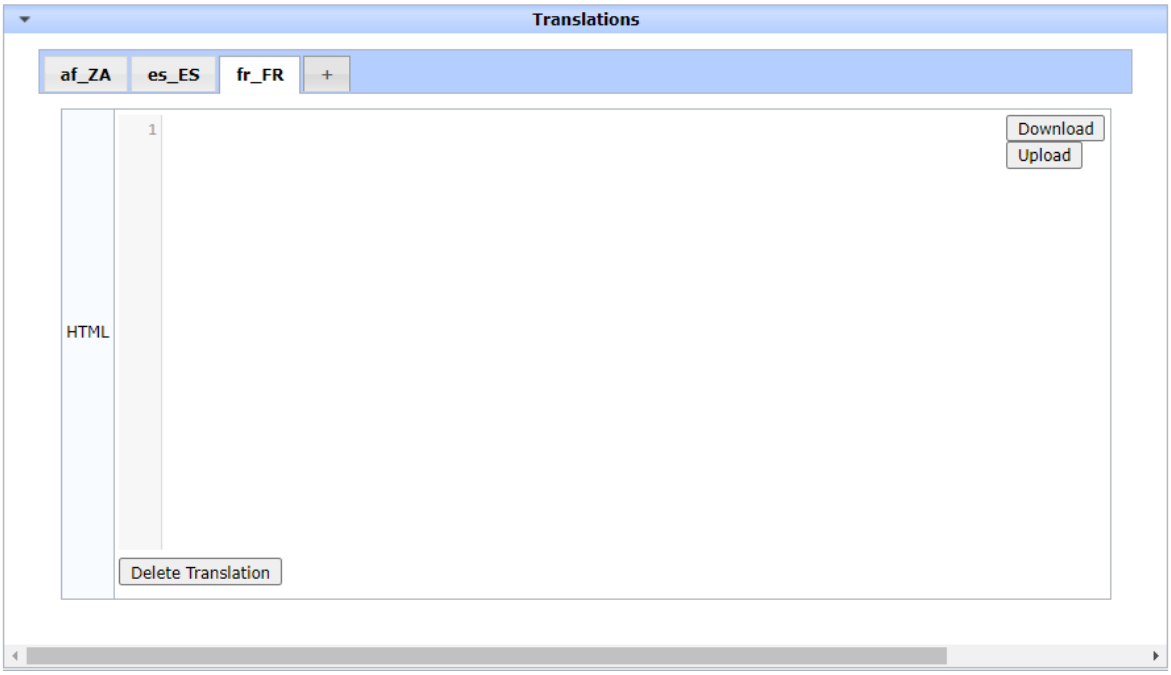
If multi-language configuration is enabled, you can create language translations for each template and any template variations. To do so:

1. Click on the **Translations** bar to expand or shrink the section.



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2. Click the **+** tab and select from the available language options to create new language variants for the template.

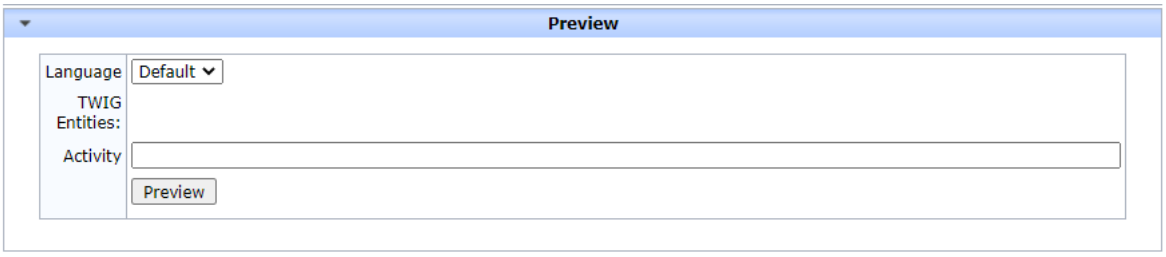


You can remove a translation by clicking **Delete Translation**.

Preview

You can see what the template looks like. To do so:

1. Click on the **Preview** bar to expand or shrink the section.



2. Leave the **Language** field as **Default** or select the language that you want to preview from the drop-down list.
3. Depending on the template type, you can enter Twig entities in the appropriate fields to provide a more accurate visual representation of the generated template.
4. Click **Preview** to display a preview of the template in a pop-up window.

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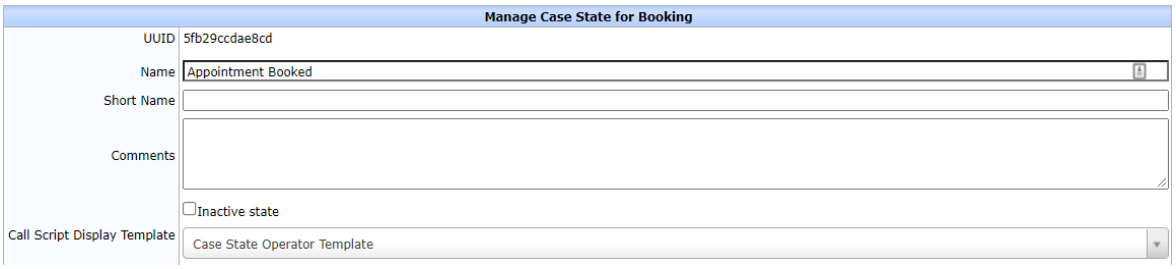
Add the case state operator template to a case state

To add the case state operator template to a case state:

1. Select **Pathways** in the **Pathway Logic** menu.
2. If the pathway already exists, find it in the list of pathways and click **Overview**. The pathway, its work stages and case states are displayed.

   If it is a new pathway, enter the pathway name and click **Create** in the **Create Pathway** section. Find the pathway in the list of pathways, click **Overview** and add the work stages and case states.
3. If the case state already exists, click on its name in the pathway to display its details in the **Manage Case State** form.

   If it is a new case state, click **Add new case state** under the appropriate work stage to display the **Create Case State** form. Enter the case state details.



4. Select the appropriate case state operator template from the drop-down list in the **Call Script Display Template** field. If you cannot see the required template, ensure that you have activated it in the **HTML Template Management** page.
5. If you have added a new case state, click **Create**.

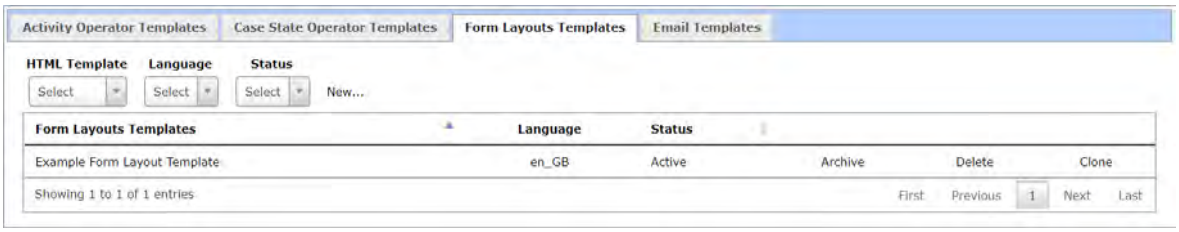
   If you have edited an existing case state, scroll down and click **Save** or **Save and Close**.

Form layout templates

Create a form layout template

To create a custom form layout template:

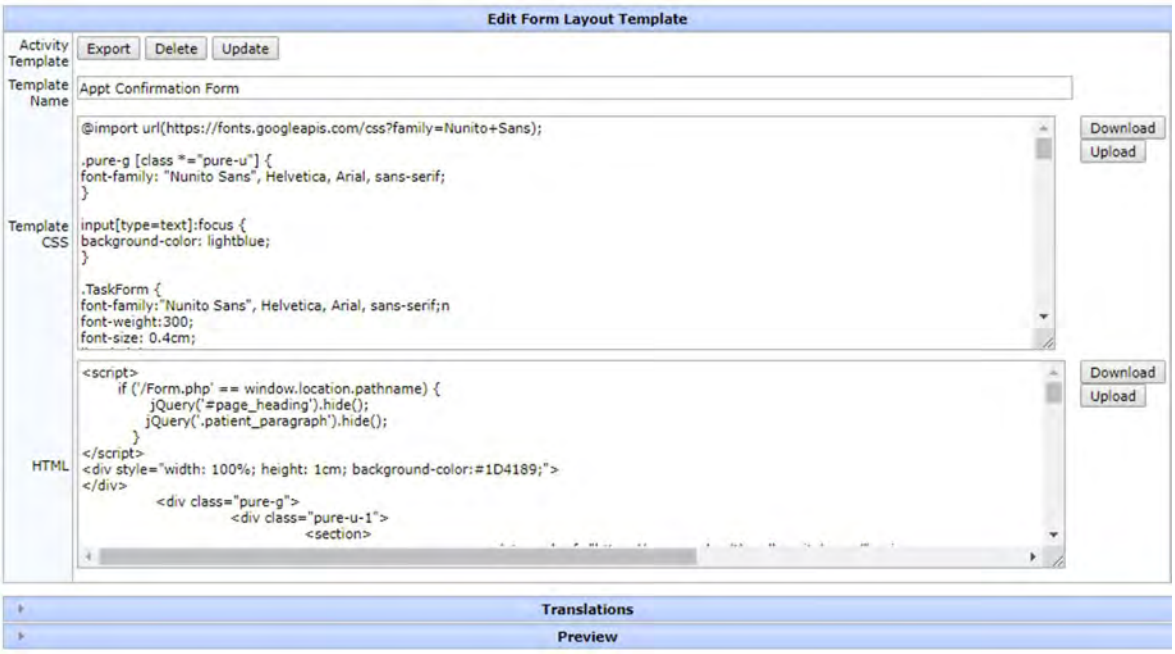
1. Select the **Form Layouts Templates** tab in the **HTML Template Management** page. You can also select **Form Layouts** in the **Forms & EMR** menu,



2. Click **New...** to display the **Form Layout Template** page.

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3. Enter the name of the template.



4. You can enter the CSS and HTML directly into the fields in this window, or use one of the following options. Template content is in JSON format.

   - **Download** - Download the CSS or HTML elements separately so that you can edit them outside Conductor. You may find it useful to download the CSS or HTML prior to making changes so that you have a record of it and can restore it to the original version, if necessary.

   - **Upload** - Upload the CSS or the HTML separately into the template after you have created or edited them outside Conductor.

   - **Copy and paste** - If you have created or edited the CSS or HTML elements, or translations, outside Conductor, you can use standard copy and paste commands to copy them into the template.

   - **Export** - You can export a file containing the existing CSS, HTML, and translations, so that you can import it into another new template. This is also useful for copying templates between different deployments of Conductor.

   - **Import** - In a new template, you can import the CSS, HTML and translations from a template that you have exported from Conductor. This is also useful for copying templates between different deployments of Conductor.

5. If multiple languages are configured for your organization, you can include translations - see *Translations (page 13)*.

6. You can preview the template - see *Preview (page 14)*.

7. When you have finished, click **Create**.

8. Click **Return to HTML Template Management** at the top left hand side of the page.



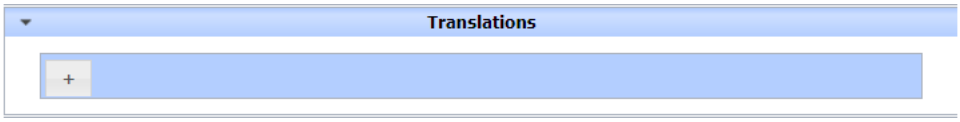
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9. Find the new template in the list and click **Activate**. To make it easier to find the template, you can select **Pending** from the drop-down list in the **Status** field to display pending templates only. You cannot use the template until its status is **Active**.

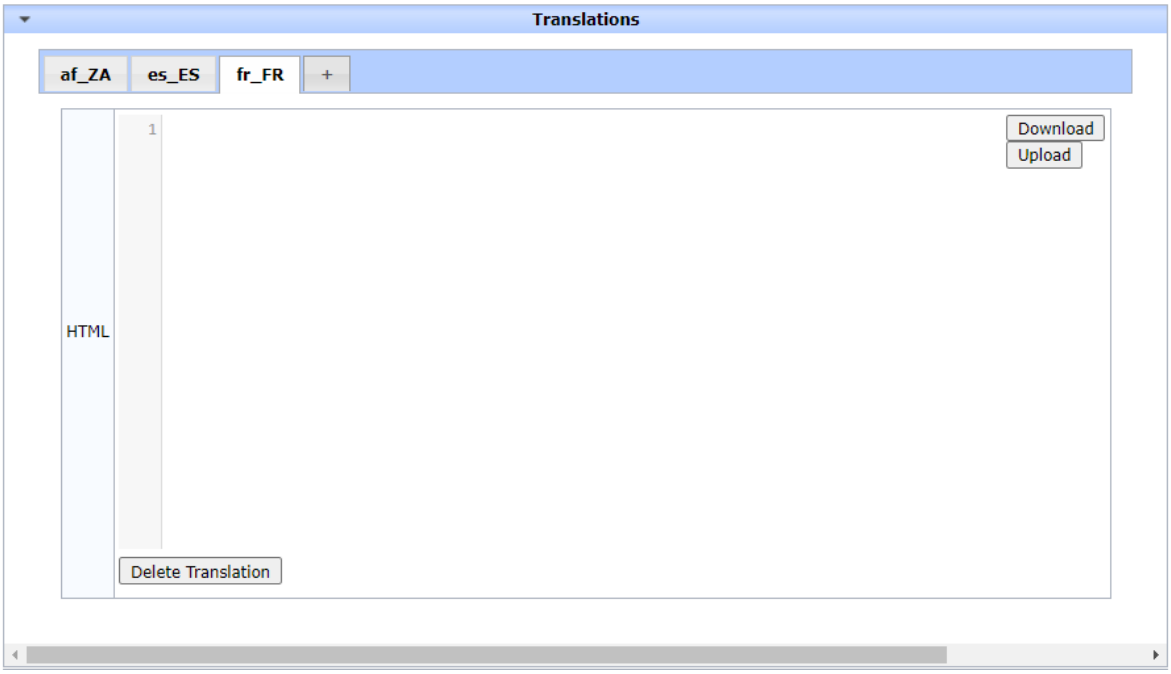
Translations

If multi-language configuration is enabled, you can create language translations for each template and any template variations. To do so:

1. Click on the **Translations** bar to expand or shrink the section.



2. Click the **+** tab and select from the available language options to create new language variants for the template.

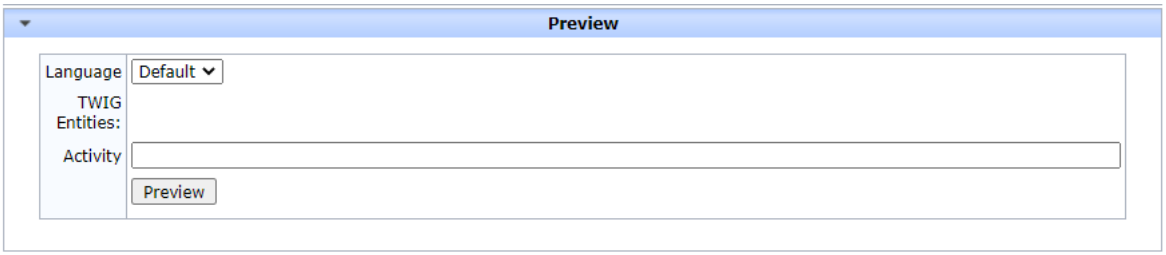


You can remove a translation by clicking **Delete Translation**.

Preview

You can see what the template looks like. To do so:

1. Click on the **Preview** bar to expand or shrink the section.



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2. Leave the **Language** field as **Default** or select the language that you want to preview from the drop-down list.
3. Depending on the template type, you can enter Twig entities in the appropriate fields to provide a more accurate visual representation of the generated template.
4. Click **Preview** to display a preview of the template in a pop-up window.

Use form layout templates

Conductor applies the defined CSS to the Twig template enabling you to customize the look and feel of a form.

See ***Forms in Lumeon Conductor*** for more information on creating and using standard and custom forms.

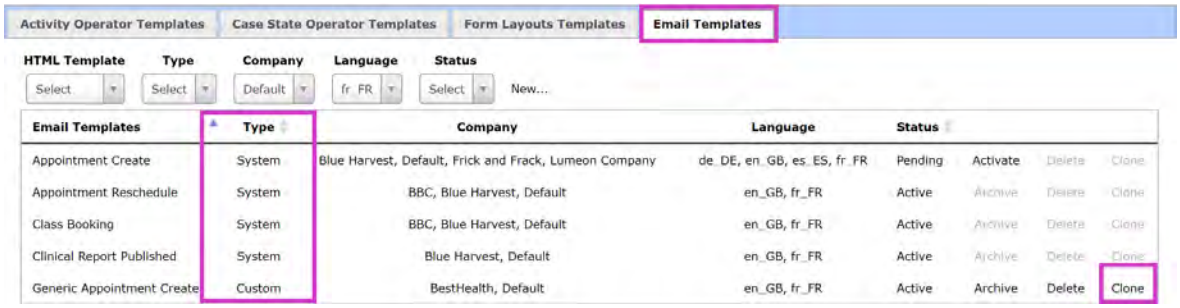
Email templates

You can configure Conductor to automatically send emails to patients, such as appointment confirmations or password resets.

View email templates

To view email templates:

1. Select **Email Templates** in the **Communication** or **Pathway Logic** menu. Alternatively, select **HTML Template Management** in the **System Configuration** menu, and select the **Email Templates** tab. This displays a list of existing email templates.



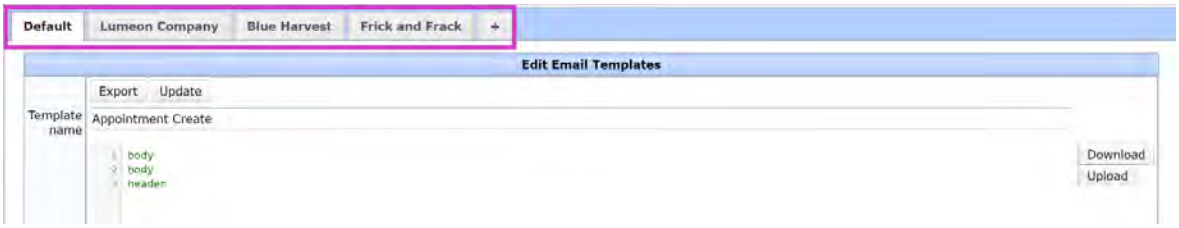
   Each email template displays a **Type** of:

   - **System** – Templates included in every Conductor implementation.
   - **Custom** – Templates created by users in your organization or by Lumeon Support on behalf of your organization.

2. Click **New** to create a new custom email template.
3. You can activate an inactive email template, archive an active template, or delete a template. You can also clone a custom template.

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4. Select an email template to display the **Default** email template which you can then edit, or click **+** to create email template versions for specific companies.



Create a new email template

To create a new email template:

1. Click **New...** to create a new custom email template.



2. Complete the fields using the table below to create a new email template. You can create email templates with either HTML or plain text content, or with both HTML and plain text content to create multi-part emails.



3. You can enter the CSS and HTML directly into the fields in this window, or use one of the options in *Import, export, download, or upload email template content (page 26)*.

4. If multiple languages are configured for your organization, you can include translations - see *Translations (page 28)*.

5. You can preview the template - see *Preview (page 29)*.

6. When you have finished, click **Create**.

7. Click **Return to HTML Template Management** at the top left hand side of the page.



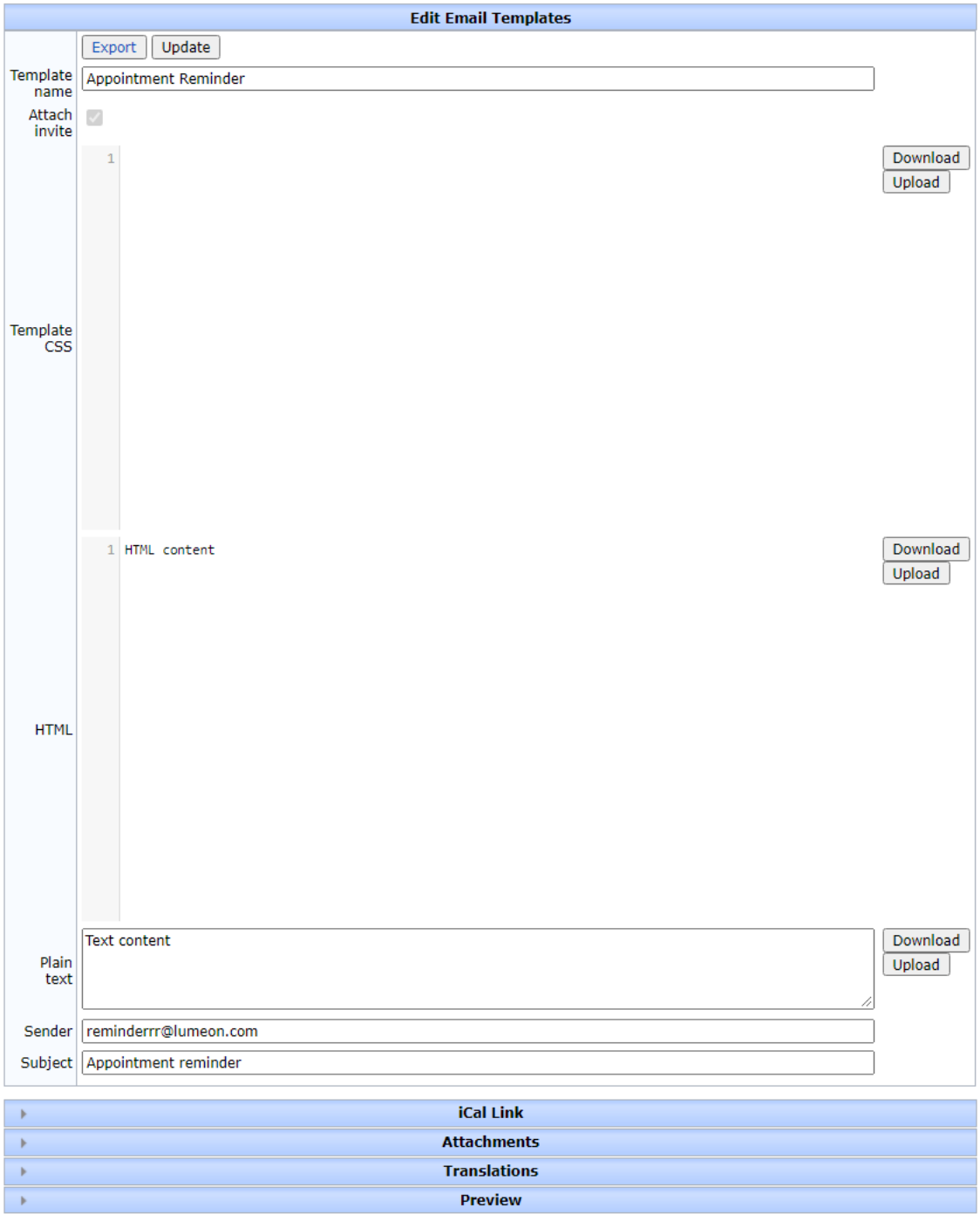
8. Find the new template in the list and click **Activate**. To make it easier to find the template, you can select **Pending** from the drop-down list in the **Status** field to display pending templates only. You cannot use the template until its status is **Active**.

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Edit an email template

To edit an email template:

1. Select an email template to display the **Default** email template which you can then edit, or create alternative versions for different companies.



2. Change the fields using the table below to edit the email template.

3. You can change the CSS and HTML directly in the fields in this window, or use one of the options in *Import, export, download, or upload email template content (page 26)*. The **Import** option is not available when editing an existing email template.

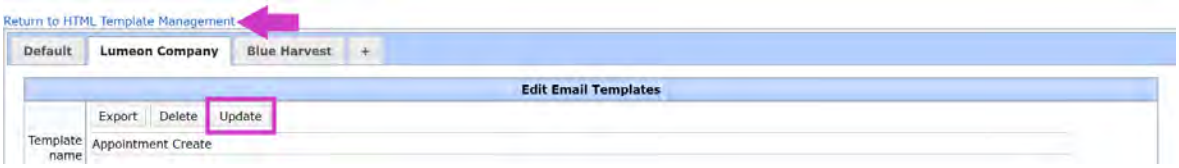
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4. If multiple languages are configured for your organization, you can add new translations or edit existing ones - see *Translations (page 28)*.

5. You can preview the template - see *Preview (page 29)*.

6. When you have finished, click **Update**.

7. Click **Return to HTML Template Management** at the top left hand side of the page.



8. Find the template in the list and click **Activate**. To make it easier to find the template, you can select **Pending** from the drop-down list in the **Status** field to display pending templates only. You cannot use the template until its status is **Active** again.

Email template fields

Complete the email template's details using the following table:

Field	Description
Template Name	Name of the email template.
Template CSS	Enter template CSS in this section.
HTML	Enter template HTML in this section. You can use merge tags to include patient and appointment related information in system templates. You can also use Twig tags to include other information, such as activity data or a response to a question in a form, in custom templates. Conductor inserts the actual values in the merge tags and Twig tags when it generates the emails. See *Appendices (page 30)* for the merge tags you can use.
Plain Text	Enter template content in plain text in this section. You can use merge tags to include patient and appointment related information in system templates. You can also use Twig tags to include other information, such as activity data or a response to a question in a form, in custom templates. Conductor inserts the actual values in the merge tags and Twig tags when it generates the emails. See *Appendices (page 30)* for the merge tags you can use.
Sender	Enter the email address that the email originates from, for example, `info@lumeonclinic.com`. The email address must be valid - see *Email sender validation (page 27)*.
Subject	Subject of the email, for example, **Your Booking is Confirmed!**.
iCal Link	You can include digital calendar data, allowing patients to receive and import appointment related calendar entries. This feature only appears for appointment related templates. See *iCalendars (page 28)*.
Attachments	You can attach documents to email templates to be included when distributed. See *Attachments (page 27)*.
Translations	Choose from the supported language options to create emails in foreign language text. HTML, attachments and iCal links can be added for each translation. See *Translations (page 28)*.
Preview	Select this option to view a preview of the email template. See *Preview (page 29)*.

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Import, export, download, or upload email template content

Use the following options to help you create or edit your email template. Template content is in JSON format.

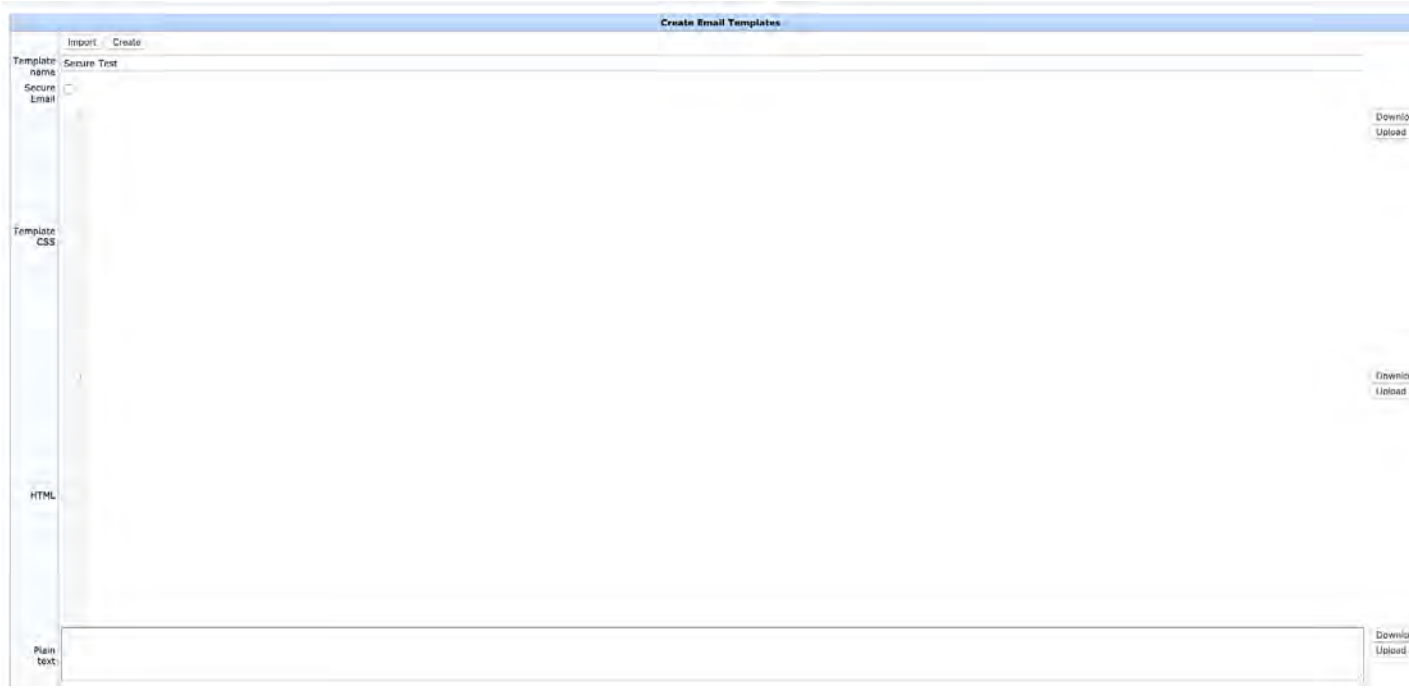
- **Download** - Download the CSS or HTML elements separately so that you can edit them outside Conductor. You may find it useful to download the CSS or HTML prior to making changes so that you have a record of it and can restore it to the original version, if necessary.
- **Upload** - Upload the CSS or the HTML separately into the template after you have created or edited them outside Conductor.
- **Copy and paste** - If you have created or edited the CSS or HTML elements, or translations, outside Conductor, you can use standard copy and paste commands to copy them into the template.
- **Export** - You can export a file containing the existing CSS, HTML, and translations, so that you can import it into another new template. This is also useful for copying templates between different deployments of Conductor.
- **Import** - In a new template, you can import the CSS, HTML and translations from a template that you have exported from Conductor. This is also useful for copying templates between different deployments of Conductor.

Secure email communication

Conductor can send individuals secure messages via the dedicated email functionality.

Secure email communication enables your organization to deliver emails to patients that first require them to successfully authenticate before accessing an email.

To indicate that the email should be distributed in a secure fashion, select **Secure Email**.



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With this setting enabled, patients receive an email, prompting them to follow a link to view or update information. Patients must successfully authenticate before viewing the secure content.

Enabling the feature allows you to configure the desired secure email settings, such as:

- Manner of authentication - whether the code is distributed via email, SMS, or IVR.
- Number of digits applied to an authentication code - 4, 6 or more digits.
- Number of allowed consecutive failed authentication attempts.
- Validity period (in days).
- Validity period of code sent (in minutes).

Email sender validation

If you enter an incorrect email address in the **Sender** field, you cannot save the template and an error message displays in red next to the **Sender** field. The message advises of the issue that you must resolve.

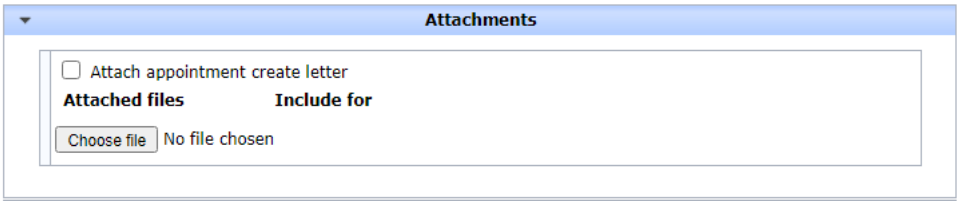


If language translations are present in the email template, you must also check that the sender's email address is correctly entered for all the language variants.

Attachments

For appointment-related email templates only, you can attach files to email templates.

Click on the **Attachments** bar to expand or shrink the form.



Select **Attach appointment create letter** if you want to attach an appointment create letter. Alternatively, click **Choose file** to select and attach a different file.

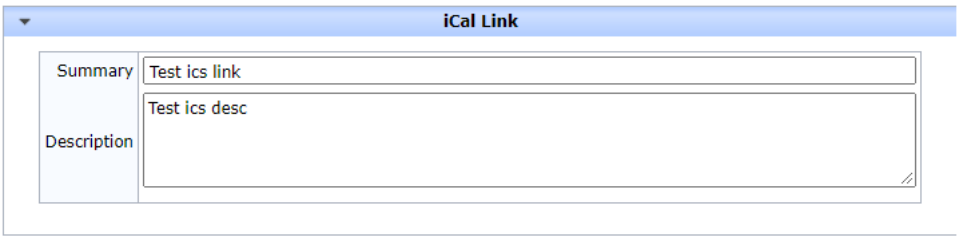
You can attach files to a template, for example, a location map. Conductor includes these files as attachments whenever the email template is used. The attachments must be in PDF, RTF, or Word format. JPG and PNG files should be converted to PDF before attaching.

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iCalendars

For appointment related email templates only, the **iCal Link** option is displayed.

Click on the **iCal Link** bar to expand or shrink the form.



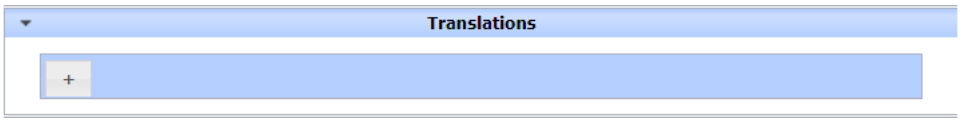
Enter the summary and description for the appointment.

When patients receive the appointment email, they can opt to include the digital calendar information in their mobile calendar.

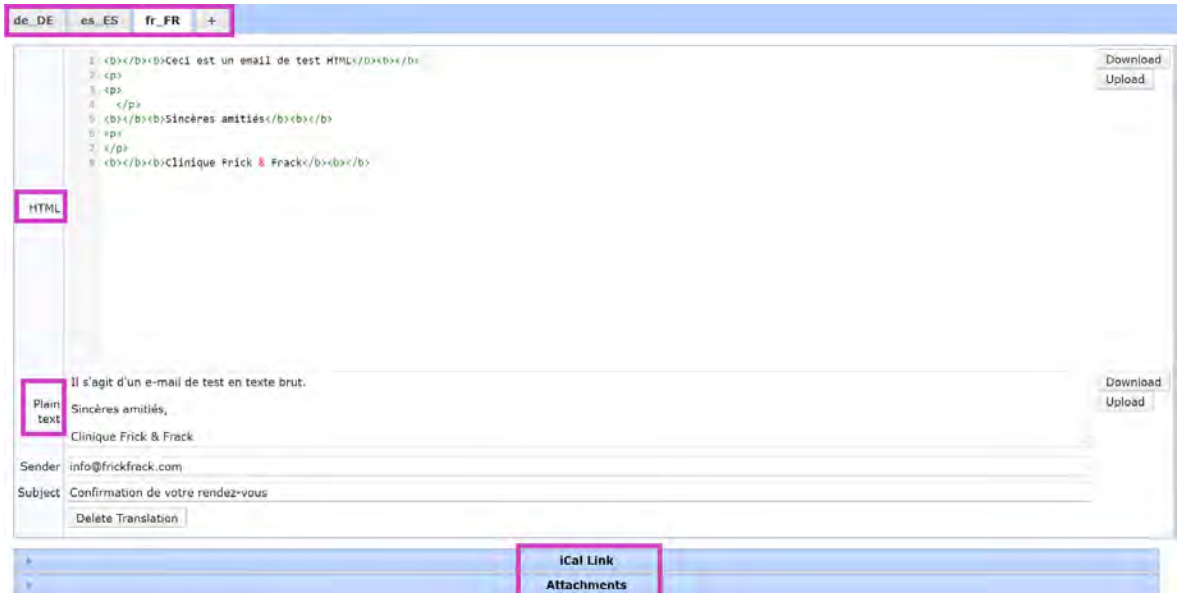
Translations

If multi-language configuration is enabled, you can create language translations for each template and any template variations. To do so:

1. Click on the **Translations** bar to expand or shrink the section.



2. Click the **+** tab and select from the available language options to create new language variants for the template.



You can add language-specific HTML and language-specific plain text content for the selected language option.

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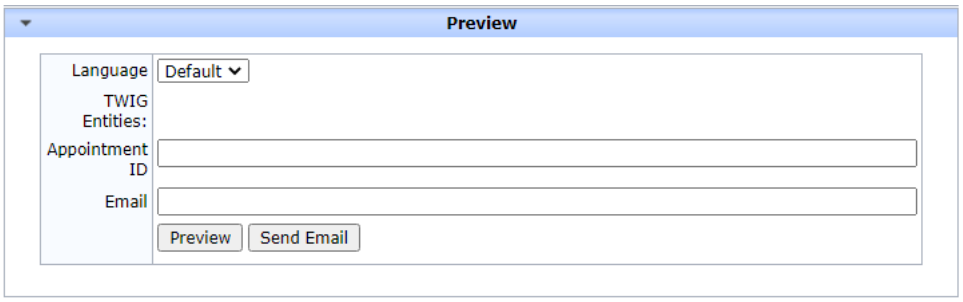
Conductor offers the ability to supply iCalendar information for each language variant for appointment related templates only. It also offers the ability to include attachments for each language variant.

You can remove a translation by clicking **Delete Translation**.

Preview

You can preview the email template. To do so:

1. Click on the **Preview** bar to expand or shrink the section.



2. Leave the **Language** field as **Default** or select the language that you want to preview from the drop-down list.

3. Depending on the template type, you can enter Twig entities in the appropriate fields to provide a more accurate visual representation of the generated email.

4. Select one of the following options:
   - **Preview** - To generate an on-screen preview of the template.



   - **Send Email** - Supply an email address to generate an email replicating the end user communication.

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Appendices

Email merge tags

To use merge tags, enter the following words between << and >> symbols, for example, <<body_text>>.

Email template	Merge tags
Access – Patient	title
	forename
	surname
	email
	password
Access – Password	title
	forename
	surname
	email
	password
Access – Employee	title
	forename
	surname
	email
	password
Access – Company	company_name
	title
	forename
	surname
	email
	password
Reset Password - Patient	title
	forename
	surname
	email
	link
Reset Password - Employee	title
	forename
	surname
	email
	link

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Email template	Merge tags
Reset Password - Company	company_name
	title
	forename
	surname
	email
	link

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Email template	Merge tags
Appointment Create/Modify/ Cancel	begin_multiple_sections
	end_multiple_sections
	end_multiple_sections
	begin_section
	end_section
	section_start
	section_end
	section_duration
	section_doctor_title
	section_doctor_forename
	section_doctor_surname
	section_name
	patient_title
	patient_forename
	patient_surname
	primary_doctor_title
	primary_doctor_forename
	primary_doctor_surname
	appointment_type_name
	date
	start
	end
	appointment_time_to_come_in
	location_name
	appointment_type_comments
	centre_address
	booker_title
	booker_forename
	booker_surname
	booker_name
	booker_email
	booked_date
	booked_time
	begin_form
	form_link
	end_form
Appointment Feedback Form	feedback_form_link

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Email template	Merge tags
Invoice	invoicee_title
	invoicee_forename
	invoicee_surname
	invoice_number
	total_price
	outstanding_amount
	location_name
	invoice_text
Patient Report Notification (EMR2 only)	title
	forename
	surname
	email
	patient_title
	patient_forename
	patient_surname
	appointment_type_name
	report_type_name
	classification
Patient Exercise	patient_title
	patient_forename
	patient_surname
	patient_address
	physio_title
	physio_forename
	physio_surname
	physio_address
	programme_name
Insurance Reminder	invoicee_title
	invoicee_forename
	invoicee_surname
	invoice_number
	total_price
	outstanding_amount
	location_name
	invoice_text
Task Reminder	task_subject
	task_priority
	task_duedatetime
	task_type
	forename
	task_detail - This tag should not be used if there is any chance that patient health information will be entered into task details.

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Email template	Merge tags
Account Locked – Patient	title
	forename
	surname
	email
Account Locked – Employee	title
	forename
	surname
	email
Account Locked – Company	title
	forename
	surname
	email
	company_name
Referrer Clinical Report Notification	contact-forename
	contact-surname
	patient-forename
	patient-surname
Debt Chasing	RecipientTitle
	RecipientForename
	RecipientSurname
	RecipientSalutation
	InsurerName
	InvoiceOutstandingDays
	InvoiceOutstandingCount
	InvoiceOutstandingTotal

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Email template	Merge tags
Custom 'action' emails - If the email has been linked to an appointment, these and 'Appointment Create/Modify/ Cancel' tags can be used. If no appointment is linked, only these tags can be used.	patient_id patient_title patient_forename patient_surname patient_next_of_kin nhs_number employee_reference job_title comments_critical business_school_depot patient_dob recipient_title recipient_forename recipient_surname event_date_long event_comments follow_up_action follow_up_due referral_speciality_name

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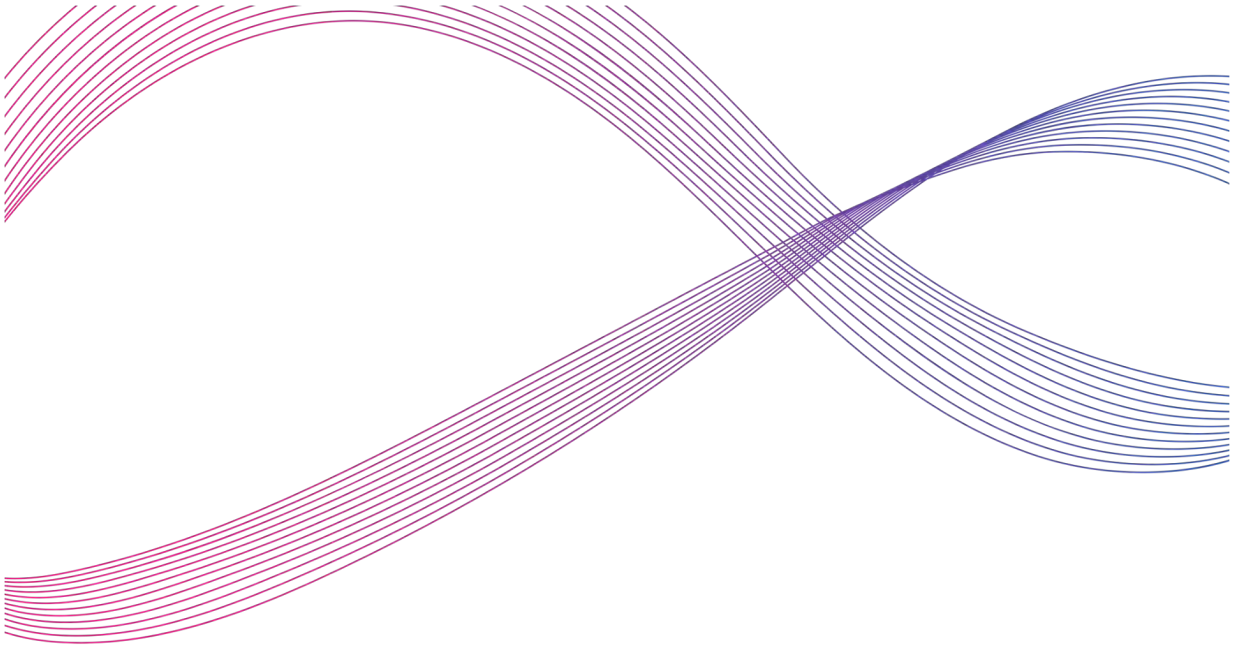
Class email and letter merge tags

You can use these merge tags when sending email and letter confirmations for classes.

To use merge tags, enter the following words between << and >> symbols, for example, `<<patient_title>>`.

Class booking template	Class cancellation template
patient_title	cancelled_by_title
patient_forename	cancelled_by_forename
patient_surname	cancelled_by_surname
doctor_title	cancelled_by_name
doctor_forename	cancelled_by_email
doctor_surname	cancelled_date
class_type_name	cancelled_time
date	
start	
end	
location_name	
centre_address	
centre_telephone	
room_name	
practitioner_email	
practitioner_tel_number	
booker_title	
booker_forename	
booker_surname	
booker_name	
booker_email	
booked_date	
booked_time	

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Pathways in Lumeon Conductor 24.2

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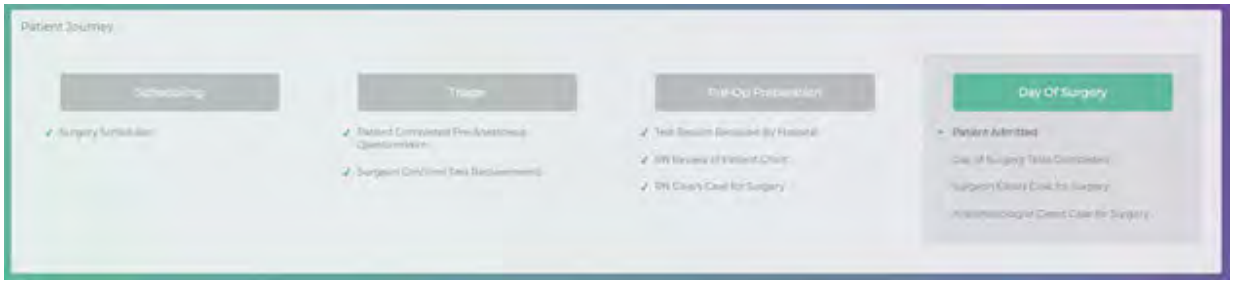
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Introduction

What are pathways?

Pathways are designed to track every aspect of the patient journey from end to end.

They uniquely allow the behaviour of a patient journey to change in real time based on the information learnt along the way and to enforce certain actions at certain points in the journey. They are able to gather data from the patient, referrer and other users, which can enable very specific behaviours to happen automatically. All this makes the system faster as well as being more powerful and scalable.



Purpose

The purpose of this document is to provide an overview of the role of pathways in Lumeon Conductor.

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What can pathways do?

Pathways enable you to configure the system to do any of the following easily and quickly:

Capability	Example
Track the patient through their patient journey and which checkpoints they have passed	I can see whether a referral has been approved or rejected, or whether an appointment has been booked for a patient.
Assign specific labels (states/checkpoints) to different parts of the journey so that users can easily see how far they've progressed	I can identify that a patient's referral from last week is currently at the 'appointment booked' stage and the next stage is to call them with a reminder, which is due in 3 days, 2 hours and 1 minute.
When the patient is in a specific state, show only the appropriate actions to the user so their options are limited to only those that are correct for that state	When a patient is in a 'Reminder to call' state, the button I see is 'Remind Patient'. When a patient is in 'Ready to Book' state, the button I see is 'Book Appointment'.
Automatically work out what state a patient should be in based on the information provided about the patient.	If a referral arrives missing key data, the referral will automatically be flagged and put into a 'missing data' state for someone to follow up.
On updating the state of a referral, automatically communicate with the patient, referrer, GP, clinician or other by email, letter or fax with appropriate communications	When the system detects that all the information for triage has been completed, it will notify a clinician to triage the referral and then, once the triage has been completed, automatically email the referrer that the patient has been accepted into the service - all without user intervention.
Pathways differ depending on contracts	A self-pay patient can follow a different pathway to a patient whose appointment is being paid by an insurance company. Different letters, emails or forms can be distributed depending on the payer.
Create goals to trigger new activities and make decisions based on performance against assigned goals (from CPM3)	A patient has a goal to lose weight; creating a goal can trigger a new activity, onto a separate pathway. Their weight is logged on a form over time. As they log their weight the pathway can be set to respond to these changes using standard pathway functionality.

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How are pathways different from other systems?

Pathways are particularly useful if a customer has a specific requirement that the system would not normally meet:

> Could we maintain a list of "high risk" clinical codes so that these can be flagged and appropriate actions are taken?

This particular requirement uses the phrases "flagged" and "appropriate actions" which together suggest some sort of alerting, a tracking of data, and some sort of dependency on the type of code. In other words, no system meets this exact requirement out of the box (as it is not an exact requirement), but some will have some sort of reporting function that allows users to search for particular codes and then process them manually.

Pathway functionality solves this in the following way:

1. Lumeon creates a pathway that checks for the list of codes that are specified as high risk.
2. These codes are then validated on every form input into the system for that activity - so no matter where the data was saved, this validation takes place.
3. If one of the codes were utilized, the pathway identifies it and immediately assigns a new pathway called "High Risk Patient" to that activity.
4. The "High Risk Patient" pathway consists of a list of states and actions to allow progress. The initial state might be "High Risk Data Detected". The user would then have to "Review Medical Record" as the next action, which would then, once it has been confirmed, allow the patient to progress to the state 'High Risk Data Reviewed'. Depending on what is needed, a letter could then be sent to the patient's GP or other actions could be completed. When the pathway is finished, the activity would be updated with "Finished Review" and the activity would return to a standard pathway.

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Other uses of pathways

- A patient registration service to send out information to patients or update other departments.
- An appointment reminder service to allow the system to notify patients about upcoming appointments in the specific ways that suit them.
- An automatic triage system to read clinical data and recommend an appropriate service for them.

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Types of pathway

Conductor pathways

Conductor pathways are pathways that Lumeon have configured and that Lumeon own the configuration and maintenance of. The customer benefits from the flexibility of the system but cannot change or modify anything without consulting Lumeon. Any change in functionality is chargeable.

Custom pathways

Custom pathways are pathways that may have been created by Lumeon, but are owned and configured by the customer on an ongoing basis. The customer receives specific training and certification in how to use the solution and is completely responsible for the output.

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How does pathway configuration work?

Pathways can access data from the following:

- Patient form responses
- EMR and EMR2 question responses
- Activity information stored in the system
- Current, future and past appointment information
- Contract related information

A pathway manages the movement of an activity through its lifecycle. It consists of an ordered list of work stages that are created to reflect the main phases of the activity journey. Each work stage consists of a collection of case states. Case states determine the location of an activity in a work stage. An activity is only ever in one case state at any given time.

Work stages and case states cannot be shared among different pathways; they are owned and contained by a single pathway. However, an activity can transition to a case state in another pathway.

Pathways are configured with rules governing how an activity moves from one case state to another. An activity can be assigned to a case state and can then move through various case states following a pathway defined in the pathway. End users can see where a patient is on their pathway and which checkpoints they have passed.

Case states can have properties. These properties can be:

- **Transition Rules** - Specify the case state the referral moves to next depending on given criteria, therefore defining the referral's movement between work stages. A transition rule can also specify an action to be performed when the conditions are met. For example:

  Move from case state 1 to case state 3 if a specific condition is true.

- **Actions** - Things that the user may do which may in turn trigger evaluation of the transition rules. For example:

  Opening a pop-up form, answering a question, pushing a button.

Case states are evaluated when:

- An activity enters a case state
- A form is completed and submitted
- An activity is modified
- An appointment is booked
- A company or insurance company is updated
- A child activity executes a transition or is cancelled

They can also be set to automatically evaluate at pre-determined time intervals.

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A check is performed when an activity is launched to ensure that the activity is not stale before launching, and forces a refresh if it is.

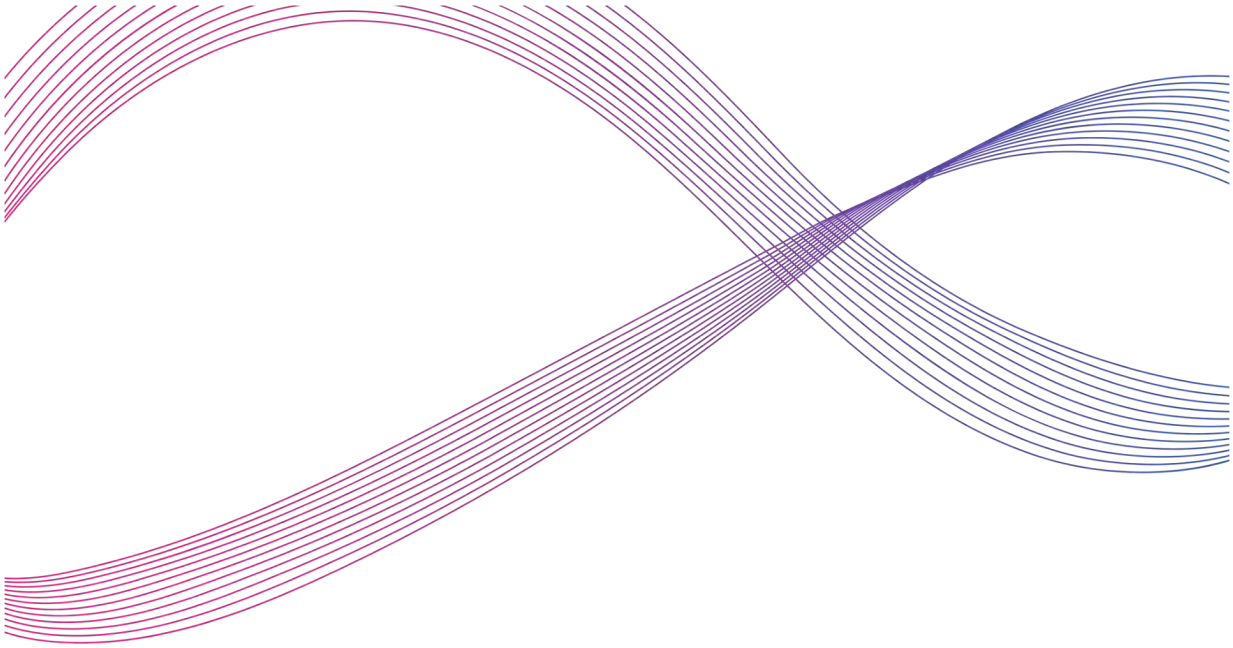
A pathway starts with the creation of an activity and case states are linked to Activities. A patient can have more than one activity at a time. As a result, a patient can be in more than one work stage and more than one case state at a time.

When a new activity is created, it will be automatically linked to a pathway and hence the appropriate work stage and case state via the contract that the activity is billed to. For example, if an activity is charged to an insurer, the system will look to the contract of that insurer and use the pathway linked to that insurer as the starting point. The rules within that pathway will then determine the case state that the activity subsequently transitions to.

Pathways exist in the system independently and different contracts can connect to the same pathway. Pathways can also interconnect via transitions allowing an activity to start in one pathway, then transition to another more specific pathway if the right conditions are met.

When an activity moves from one case state to another, it progresses along the pathway and different worklist views or the patient pathway operator view can be used to track the patient states or patient progress in a pathway or to perform different actions against the patient referral.

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Invitation to Book in Lumeon Conductor 24.2

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Introduction

Invitation to book functionality enables patients to independently book an appointment, based on a set of appointment options presented to them. Conductor sends patients an email, an interactive SMS message (ISMS), or a standard SMS message containing a link to the invitation to book an appointment.

Invitation to book functionality

Initially, a system administrator creates an action based on the invitation to book pathway function. Workflow administrators can create invitation to book actions for specific booking scenarios, either by specifying them directly or by using Twig logic to derive them from the relevant activity. In addition, Conductor can generate invitation to book actions based on transitions within a care pathway.

Administrators can initiate an invitation to book action using either the dashboard or operator UI. Alternatively, Conductor can execute this action automatically by a transition within a care pathway. The patient receives a link in the email or SMS which takes the patient to a portal page. The patient selects the appointment they want from a set of appointment slots. You can define the appointments displayed based on the invitation to book action, for example, the types of appointments, locations, and practitioners. Administrators and practitioners can view these appointments in the practitioner's diary.

Standard non-interactive SMS, interactive SMS (ISMS), and email templates can be configured to conform to your organization's branding.

See also ***Letter & Email Templates in Lumeon Conductor*** and ***SMS & IVR Messages in Lumeon Conductor*** for more information on setting up email and SMS templates, respectively.

Purpose

The purpose of this document is to:

1. Capture the information you must provide so that Lumeon can configure the invitation to book functionality to meet your requirements. See *Invitation to book configuration decisions (page 4)*.

2. Describe the setup required in Lumeon Conductor to enable invitation to book functionality. See *Invitation to book setup (page 9)*. Lumeon or a system administrator can perform the invitation to book setup.

3. Explain how Conductor users generate an invitation to book link and send it in an email or SMS to a patient. See *Create activity and trigger invitation to book (page 30)*.

4. Explain how to view an appointment that a patient has selected in a practitioner's diary. See *View the appointment (page 33)*.

5. Provide an overview of the invitation to book experience from the patient's perspective. See *Invitation to book as a patient (page 34)*.

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Invitation to book configuration decisions

If you want your patients to use invitation to book functionality, you need to make a number of decisions regarding how you want the patient screens to be configured to suit your organization's requirements. These decisions fall into two categories:

1. **Custom styling** - You can configure the logo and colours of the patient's invitation to book screens to match your organization's branding. See *Custom styling decisions (page 4)*.

2. **Text** - You can configure the patient's invitation to book screens to display the text that you want your patients to see. See *Invitation to book text requirements (page 7)*. Contact Lumeon Support if you want us to do this on your behalf.

We have provided checklists at the end of this section so that you can make sure that you have covered all the configuration decisions you need to make - see *Checklists (page 8)*.

Custom styling decisions

Lumeon can style the patient's invitation to book screens to suit your organization's colour palette and branding requirements. What do you want these screens to look like?

Lumeon can configure the following for you:

- Logo
- Primary colours (dark, normal, light)
- Secondary colours (dark, normal, light)



The logo, primary colours and secondary colours defined here can also be used in the Patient Portal.

Patient's invitation to book screens

The custom styling on the patient's invitation to book screens is made up of two colour sets, which each contain three variants:

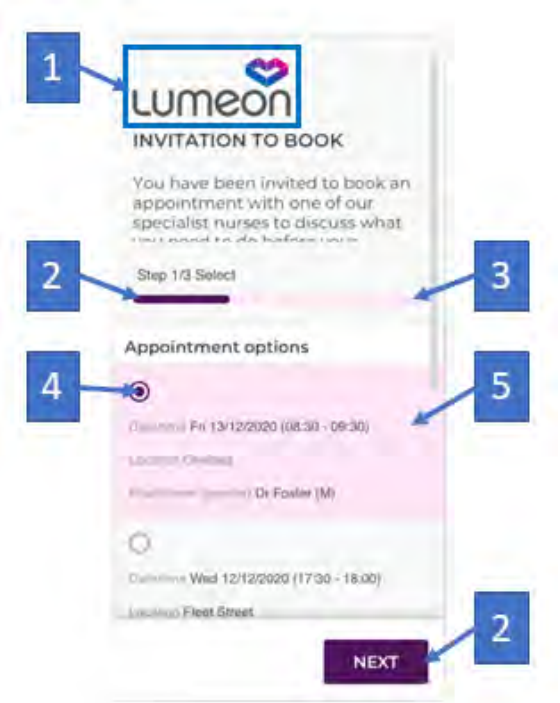
- Primary colours are the main colour theme associated with your brand.
- Secondary colours are used as an accent colour to denote selection.

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Custom styling on step 1 screens for PC and mobile phone

The following diagrams show the position of the logo and the colours in the patient's invitation to book screen for step 1 for a PC (left) and a mobile phone (right).

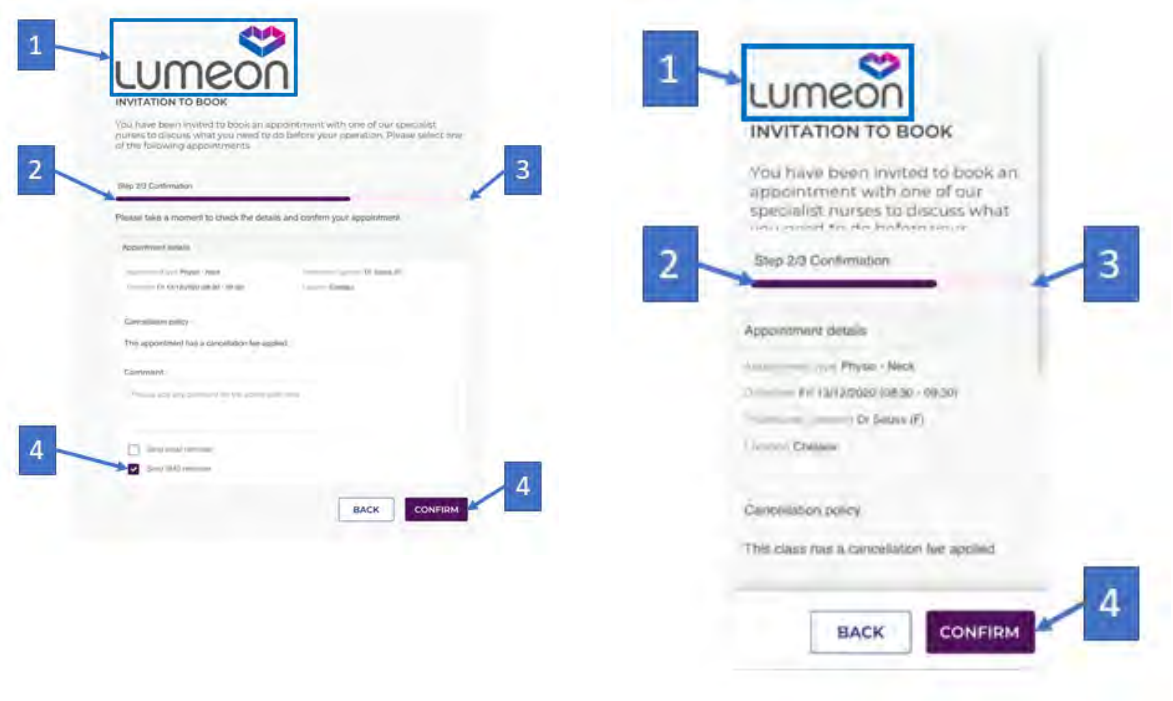




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Custom styling on step 2 screens for PC and mobile phone

The following diagrams show the position of the logo and the colours in the patient's invitation to book screen for step 2 for a PC (left) and a mobile phone (right).



Patient screen design attributes

Lumeon can configure the following design attributes:

	Design attribute	Description	Acceptable formats
1	Logo	You can display your own logo here.	PNG format
	Primary colour (normal)	The primary colour in your organization's palette. Not used in the patient's invitation to book screens.	#HEX format
2	Primary colour (dark)	A darker variant of the primary colour that helps create contrast between screen elements. Used for: · Progress bar - percentage complete · **Next** and **Confirm** buttons	#HEX format
3	Primary colour (light)	A lighter variant of the primary colour that helps create contrast between screen elements. Used for the progress bar - percentage incomplete.	#HEX format
	Secondary colour (normal)	The secondary colour in your organization's palette. Not used in the patient's invitation to book screens.	#HEX format
4	Secondary colour (dark)	A darker variant of the secondary colour. Used for selected checkboxes and radio buttons.	#HEX format

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	Design attribute	Description	Acceptable formats
5	Secondary colour (light)	A lighter variant of the secondary colour. Used for row highlighting.	#HEX format

Invitation to book text requirements

You can provide Lumeon with the text that you want to display on the patient's invitation to book screens. Alternatively, system administrators can set up this information - see *Set up invitation to book display (page 24)* and *Set up invitation to book action (page 14)* for information on how to do this.

The following table describes the fields that define how the screen displays for patients who click on the invitation to book link. The numbers refer to the numbers in the screenshots in *Patient invitation to book text fields (page 26)*.

The text is the same for all devices so please ensure that they are not too long for displaying on a mobile phone.

Number	Field	Description
1	Screen Title	Enter the title for the invitation to book screen. For example: `Invitation to book an appointment` See *Set up invitation to book display (page 24)* for information on how to enter this text.
2	Introduction Text	Enter the introductory text you want to appear on the invitation to book screen. For example: `You have been invited to book an appointment with one of our specialist nurses to discuss what you need to do before your operation. Please select one of the following appointments.` See *Set up invitation to book display (page 24)* for information on how to enter this text.
3	Description	You can add extra text below the **Introduction Text** using the **Description** field in the **Invitation to Book Action** page. This is optional. For example: `Please select one of the following appointments or click SHOW MORE to display more appointments.` See *Set up invitation to book action (page 14)* for information on how to enter this text.
4	Success Message	Enter the message you want to display if the patient successfully books an appointment. For example: `Congratulations, your appointment has been booked!` See *Set up invitation to book display (page 24)* for information on how to enter this text.
5	Failure Message	Enter the message you want to display if the patient is unsuccessful in booking an appointment. This might happen if the appointment selected by the patient is no longer available. For example: `Unfortunately, we were unable to book your appointment. Please start again or contact us by phone on 020 1234 5678.` See *Set up invitation to book display (page 24)* for information on how to enter this text.

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Number	Field	Description
6	Problem with your Invitation	Enter the text you want to display to the patient if there was a problem with booking their appointment. This could be if the invitation to book link has expired. For example: `Unfortunately, your invitation to book an appointment is no longer valid or there are no available appointments to book. Please get in touch with the clinic on 020 1234 5678 for assistance.` See *Set up invitation to book display (page 24)* for information on how to enter this text.

Checklists

Custom styling checklist

Decide on the following - see *Custom styling decisions (page 4)*:

☐ Logo

☐ Primary colour (dark)

☐ Primary colour (light)

☐ Secondary colour (dark)

☐ Secondary colour (light)

Text requirements checklist

If you want Conductor to set up the text in the patient invitation to book screens, decide on the following. See *Invitation to book text requirements (page 7)* for descriptions of the fields and *Patient invitation to book text fields (page 26)* for example screenshots.

☐ Screen title

☐ Introduction text

☐ Description (optional)

☐ Success message

☐ Failure message

☐ Problem with your invitation message

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Invitation to book setup

Lumeon must configure the logo and colours displayed in the patients' invitation to book link. Once we have done this, a system administrator can set up the invitation to book functionality. You must set up the following to ensure that the invitation to book functionality is fully enabled:

- Email and SMS templates - see *Set up email and SMS templates (page 9)*.
- Set patient communication preferences - see *Set patient communication preferences (page 14)*.
- Invitation to book action - see *Set up invitation to book action (page 14)*.
- Invitation to book pathway - see *Set up a pathway (page 19)*.
- Invitation to book activity type - see *Set up activity type (page 23)*.
- Invitation to book display - see *Set up invitation to book display (page 24)*.

Contact Lumeon Support if you want us to set up the invitation to book functionality.

Set up email and SMS templates

You must set up the email and SMS templates that you want to send to patients inviting them to book an appointment. Then you must link the templates to the correct invitation to book communication scheme trigger. Conductor sends an email or an SMS depending on the patient's communication preferences.

Conductor can send standard SMS or interactive SMS (ISMS) to patients. This depends on whether a core configuration parameter enabling interactive communication has been set up for your organization, and which templates you link to the invitation to book communication scheme:

- If interactive communication is disabled and a standard SMS template is defined in the communications scheme, Conductor sends a standard SMS to the patient.
- If interactive communication is enabled and an ISMS template is set in the communications scheme, Conductor sends an ISMS to the patient.
- If interactive communication is enabled and an ISMS template is not defined but a standard SMS template is defined in the communications scheme, Conductor sends a standard SMS to the patient.

Set up email template

To set up the invitation to book email template:

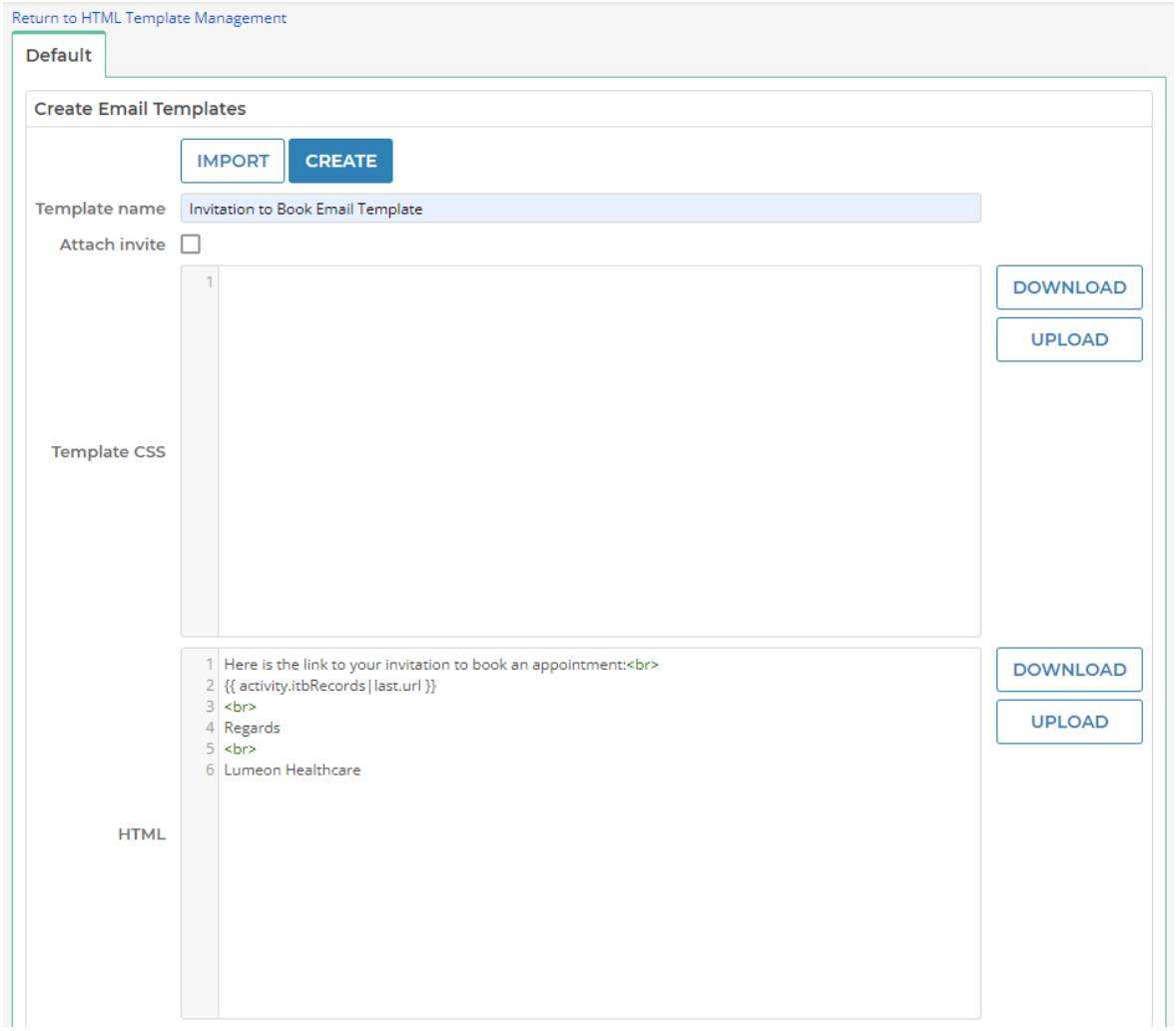
1. Select **Email Templates** in the **Pathway Logic** or **Communication** menu.
2. Click **New...** to display the **Create Email Templates** page.
3. Enter the name of the email template.

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4. Enter the CSS in the **Template CSS** field to style the template.

5. Enter the text for the invitation to book email in the **HTML** field. Include the Twig tag for the invitation to book link. For example:

```
Here is the link to your invitation to book an appointment:<br>
{{ activity.itbRecords|last.url }}
<br>
```



Alternatively, you can enter plain text in the **Plain Text** field. You can enter the URL of the link which the patient can copy and paste into their browser.

6. Enter the email address of the sender in the **Sender** field.

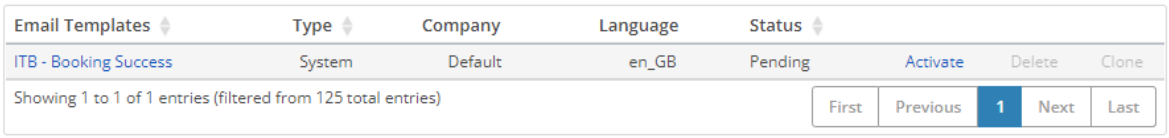
7. Enter the subject for the email in the **Subject** field.

8. Click **Create**.

9. Click **Return to HTML Template Management** in the top left hand corner of the page.

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10. Search for the email template that you have just created. You can do this in a number of ways:
    - Start typing the name of the template in the **HTML Template** field and select the appropriate one.
    - Select **Pending** in the **Status** field to display all pending email templates.
    - Click **Last** to display the most recently created email templates.
11. Click **Activate** in the row of the email template to change its status from **Pending** to **Active**.

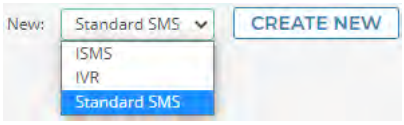


See ***Letter & Email Templates in Lumeon Conductor*** for more information on setting up email templates.

Set up the standard SMS template

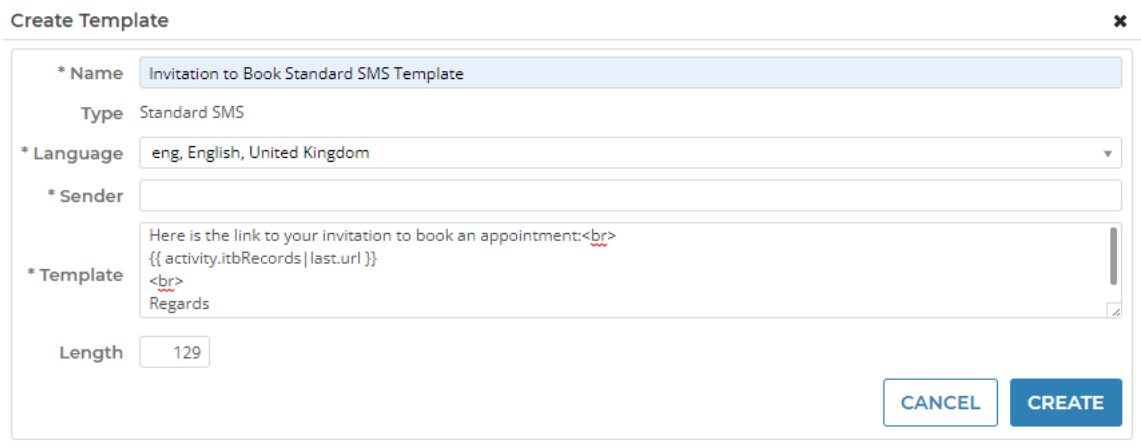
To set up the invitation to book standard SMS template:

1. Select **SMS Templates** or **SMS & IVR Templates** in the **Pathway Logic** or **Communication** menu.
2. Select **Standard SMS** in the drop-down list in the **New** field.



3. Click **Create New** to display the **Create Template** page in a new window.
4. Enter the template name, select the language, and enter the sender.
5. Enter the text for the invitation to book standard SMS in the **Template** field. Include the Twig tag for the invitation to book link. For example:

```
Here is the link to your invitation to book an appointment:<br>
{{ activity.itbRecords|last.url }}
<br>
```



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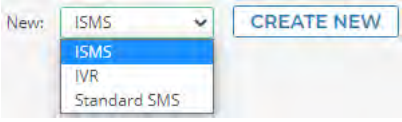
6. When you have finished, click **Create**. The new standard SMS template displays in the list of templates.

See ***SMS & IVR Templates in Lumeon Conductor*** for more information on setting up standard SMS templates.

Set up the ISMS template

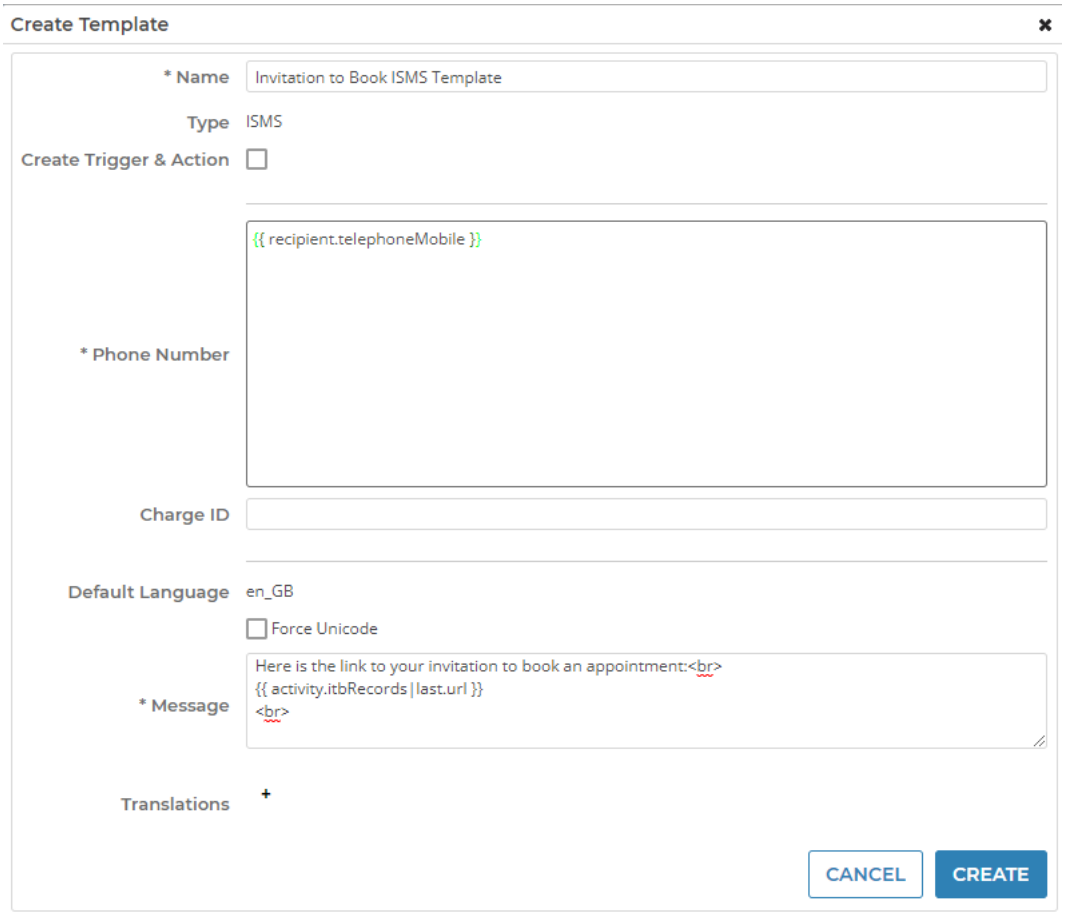
To set up the invitation to book ISMS template:

1. Select **SMS Templates** or **SMS & IVR Templates** in the **Pathway Logic** or **Communication** menu.
2. Select **ISMS** in the drop-down list in the **New** field.



3. Click **Create New** to display the **Create Template** page in a new window.
4. Enter the template name and the phone number that you want the template to use.
5. Enter the text for the invitation to book ISMS in the **Message** field. Include the Twig tag for the invitation to book link. For example:

```
Here is the link to your invitation to book an appointment:<br>
{{ activity.itbRecords|last.url }}
<br>
```



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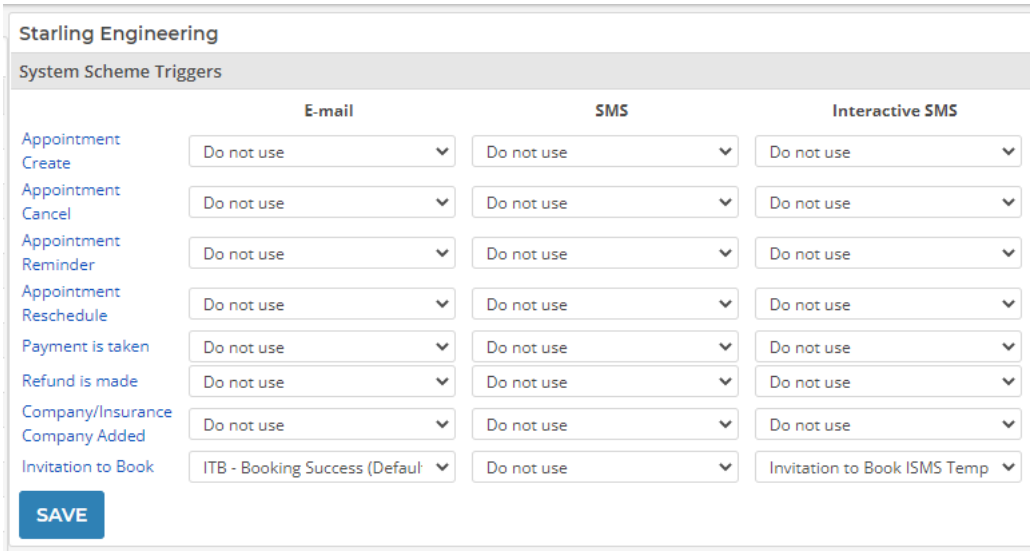
6. Click **Create**. The new ISMS template displays in the list of templates.

See ***SMS & IVR Templates in Lumeon Conductor*** for more information on setting up ISMS templates.

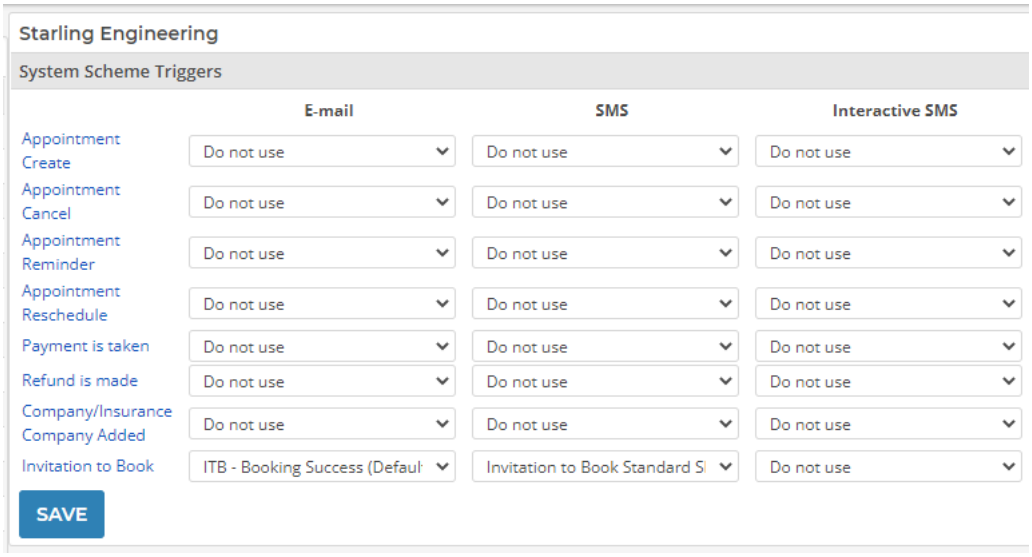
Link templates to the invitation to book scheme

You must link the email and SMS templates to the appropriate invitation to book scheme trigger. To do this:

1. Select **Schemes** in the **Communication** menu to display the **Communication Schemes** page.
2. Select the communication scheme that you want to use. This may be the **Default Scheme** or a scheme associated with a patient's company. In this example, the patient works for **Starling Engineering** which uses their company's communication scheme.
3. In the **Invitation to Book** row in the **System Scheme Triggers** section, select the invitation to book email and standard SMS, and/or ISMS templates from the drop-down lists.



If your organization does not use interactive communication, select the appropriate email and SMS templates.



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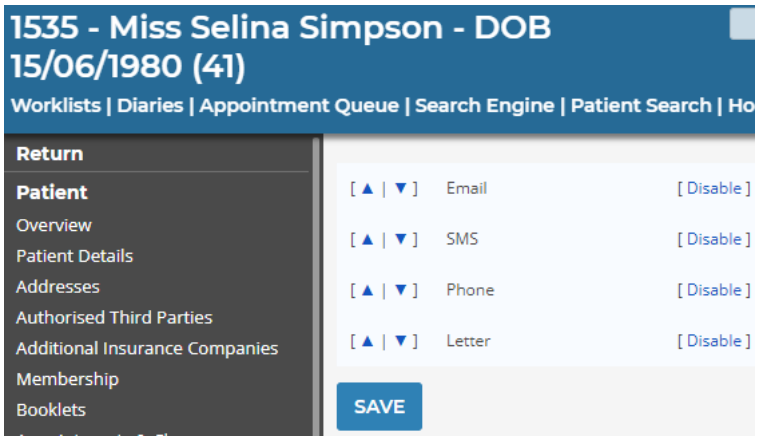
4. Click **Save**.

Set patient communication preferences

You must ensure that a patient's communication preferences are enabled for email and/or SMS. Conductor uses the preferences to establish whether to send an email or an SMS. It does not matter whether phone or letter options are available because invitations to book an appointment only use email or SMS.

To set a patient's communication preferences:

1. Select **Patient Search** in the top menu bar, start typing the patient's last name and select the patient from the drop-down list.
2. Select **Communication Preferences** in the **Patient** menu.



3. Use the up and down arrows next to the communication options to move their order so that email or SMS are at the top of the list, depending whether the patient's preference is to receive an email or an SMS.
4. You can also click **Disable** to remove some communication options completely.
5. Click **Save**.

Set up invitation to book action

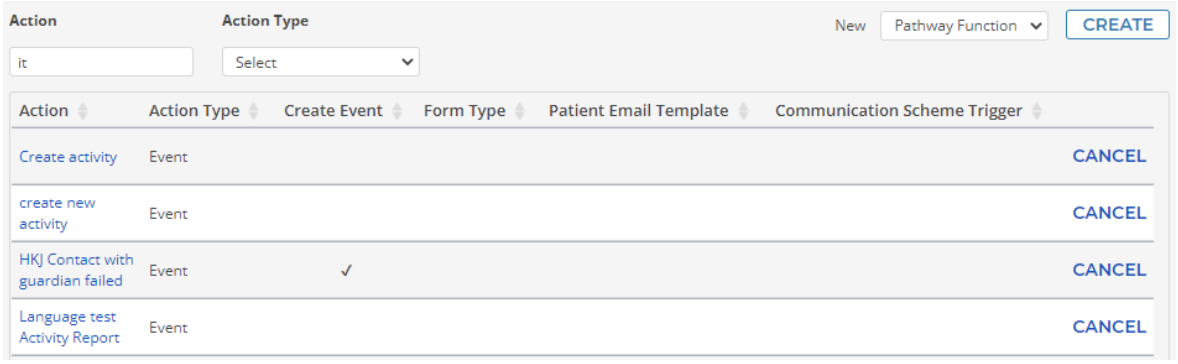
You can set up an invitation to book action for every scenario you need. This enables you to have different criteria, such as the practitioners, the appointment types, and locations, for each scenario. For example, you may want to invite patients to book an appointment with a nurse for a flu vaccination, with a specialist practitioner for a consultation about a specific condition, and a one-off invitation that you can trigger.

To set up an invitation to book action:

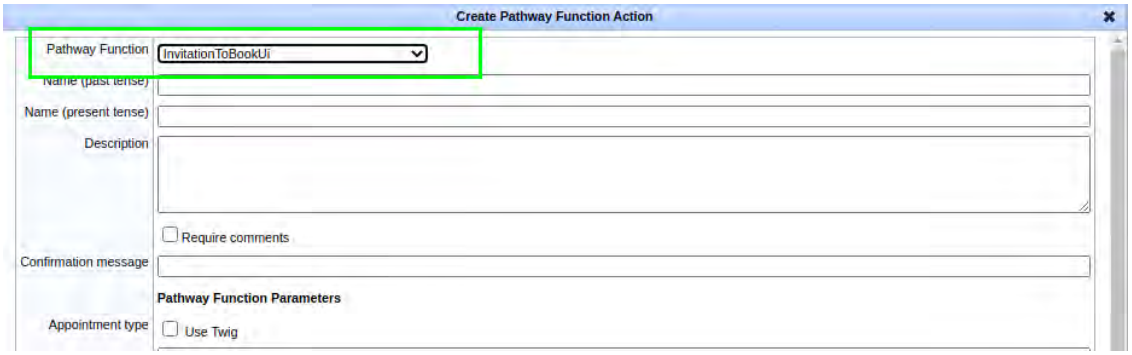
1. Select **Actions** in the **Pathway Logic** menu to display the **Actions** page.

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2. In the top right hand corner of the page, select **Pathway Function** from the drop-down list in the **New** field and click **Create**. The **Create Action** window displays.

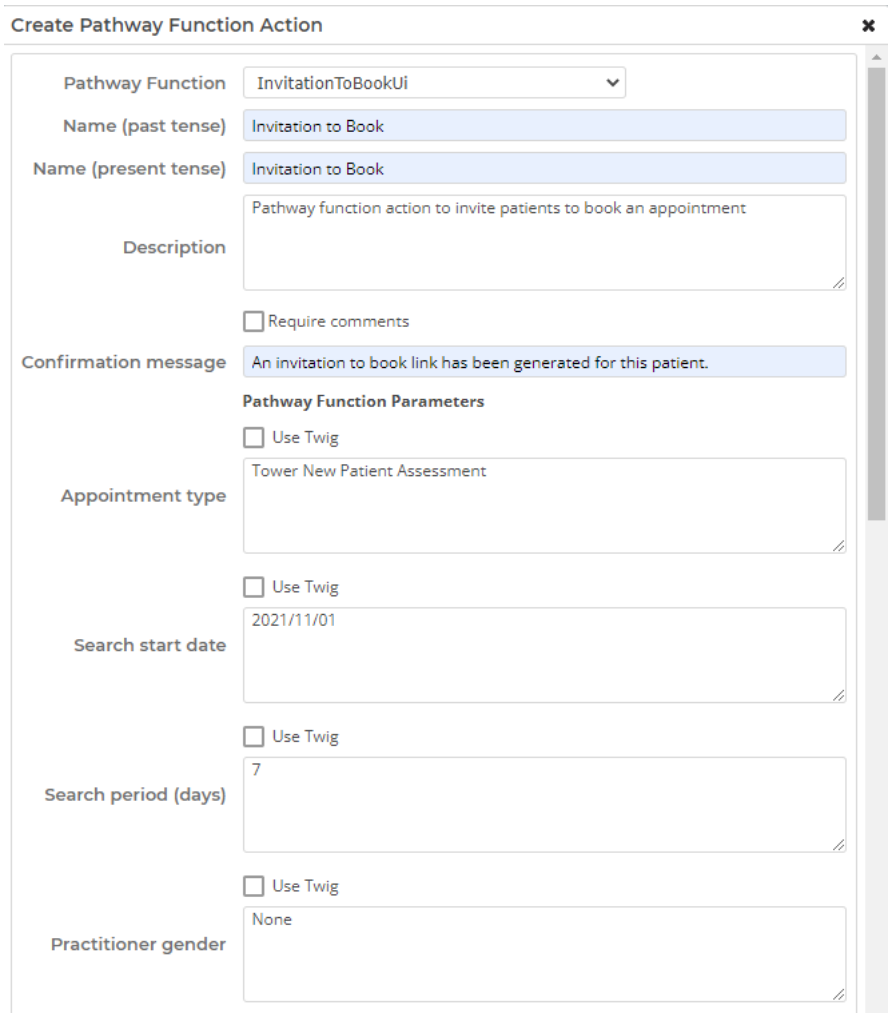


3. Select **InvitationToBookUI** from the drop-down list in the **Pathway Function** field.



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4. Enter the fields for the invitation to book action using the fields in the *table (page 16)* below. You can enter text values or select **Use Twig** above the field to enter Twig logic to determine the value. Values are case-sensitive. Ensure that you enter them correctly otherwise the invitation to book procedure may fail if the characters do not match exactly.



5. Scroll to the bottom of the window and click **Create**.

Invitation to book action fields

Use the following table to complete the details for the invitation to book action. The number **3** refers to the number in the diagrams in *Text on step 1 screens for PC and mobile phone (page 19)*.

Number	Field	Description
	Name (past tense)	Enter the name of the invitation to book action, in the past tense.
	Name (present tense)	Enter the name of the invitation to book action, in the present tense.
	Description	Enter a description of the action.
	Require comments	When a user triggers an invitation to book link to be sent to a patient, you can enable them to enter a comment. If selected, when the link is generated, a dialog box is displayed for the user to enter text.

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Number	Field	Description
	Confirmation message	Enter the message that you want to display when you generate an invitation to book link for a patient. See *Trigger invitation to book activity for a patient (page 31)* for more information. For example: `An invitation to book link has been generated for this patient.`

	Appointment type	Enter the appointment types that you want to include in the invitation to book link. Enter text or select **Use Twig** above the field to enter Twig code to determine the appointment types. If you enter more than one appointment type, separate them with a comma but no spaces, for example:
		
		`Comprehensive Patient Assessment,Hearing Test,Occupational Health Check`
		
		In the following example, the Twig code assigns a specific appointment type depending on whether the patient is male or female.
		
		`{% spaceless %}`
		`{% if activity.patientIndividual.sex == 'M' %}`
		`Appointment_type_M`
		`{% elseif activity.patientIndividual.sex == 'F' %}`
		`Appointment_type_F`
		`{% else %}`
		`Appointment_type_M`
		`{% endif %}`
		`{% endspaceless %}`

	Search start date	Enter the start date for the appointments. Enter text or select **Use Twig** above the field to enter Twig code to determine the search start dates. If you enter an actual date, use the format: `YYYY/MM/DD`, for example, **2021/11/23**. In the following example, the Twig code searches for appointments starting three days from the day that the action is triggered. `{{ 'now'|date('d/m/Y')|date_modify("+3 days") }}`
	Search period (days)	Enter the number of days to search for appointments, starting from the **Search start date**. Enter text or select **Use Twig** above the field to enter Twig code to determine the search period.

	Practitioner gender	Enter the gender of the practitioner for the appointment. Enter text or select **Use Twig** above the field to enter Twig code to determine the practitioner's gender. Text options are: `M`, `F`, or `none`.
		
		In the following example, the Twig code assigns a male practitioner for a male patient and a female practitioner for a female patient.
		
		`{% spaceless %}`
		`{% if activity.patientIndividual.sex == 'M' %}`
		`M`
		`{% elseif activity.patientIndividual.sex == 'F' %}`
		`F`
		`{% else %}`
		`none`
		`{% endif %}`
		`{% endspaceless %}`

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Number	Field	Description

	Appointment payor	Enter the payor for the appointment. Enter text or select **Use Twig** above the field to enter Twig code to determine the appointment payor. Valid text values are:
		· **Patient** - The patient pays for the appointment.
		· **Company** - The company where the patient works pays for the appointment.
		· **Insurance Company** - The insurance company entered on the patient's record pays for the appointment.
		· **Activity payor** - Conductor uses the individual identified in the **Payor** field of the activity type, and displayed in the **Charge To** field of the invitation to book activity details for the patient, to pay for the appointment.
		In the following example, the Twig code determines the payor from the patient details:
		`{% if patient.age > 18 %}`
		`{{payor.name == 'Company'}}`
		`{% elseif ….. something else %}`
		`{{payor.name == 'Insurance Company'}}`
		`{% else %}`
		`{{payor.name == 'Patient'}}`
		`{% endif %}`

	Appointment location	Enter the location for the appointment. Enter text or select **Use Twig** above the field to enter Twig code to determine the appointment locations. If you enter more than one location, separate them with a comma but no spaces, for example:
		`Battersea Clinic,Chiswick Clinic,Tower Bridge Clinic,Waterloo Clinic,Westminster Clinic`
		In the following example, the following Twig code determines the location assigned to the invitation to book activity:
		`{{ activity.toLocation }}`
		Alternatively, the following Twig code retrieves the last location that the patient attended:
		`{{ activity.mostRecentAppointment.location.name }}`

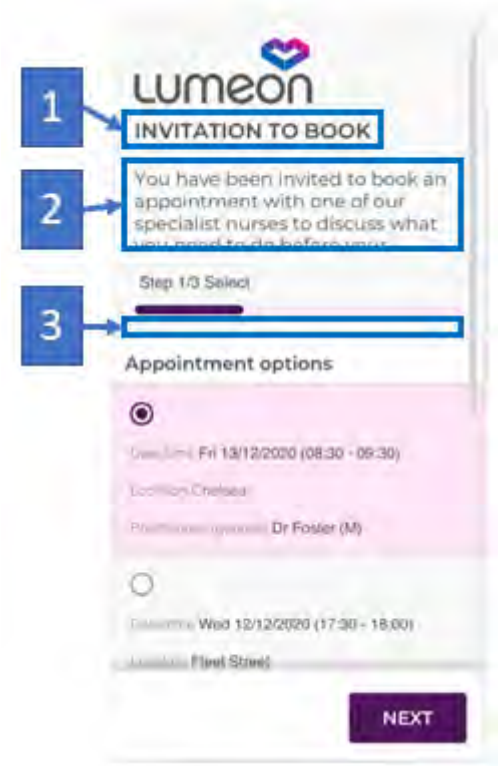
	Suggested appointments only	Enter whether only suggested appointments should be displayed to the patient. Enter text or select **Use Twig** above the field to enter Twig code to determine whether suggested appointments only should be displayed. Text options are: · **true** - Conductor only suggests appointment slots at the beginning of the day, end of the day, or next to an existing appointment in the practitioner's diary. · **false** - Conductor suggests any appointment slots.
	Named practitioners only	Enter whether only appointments with named practitioners are available or enter the names of the practitioners whose appointments can be offered. Enter **all** if appointments with all practitioners can be offered. Enter text or select **Use Twig** above the field to enter Twig code to determine this. If you enter the names of more than one practitioner, separate them with a comma but no spaces, for example: `Dr Ashley Brent,Dr Rowan Richmond,Dr Skylar Westminster`
3	ITB description text	Enter the description text that the patient sees when they click on the invitation to book link. Enter text or select **Use Twig** above the field to enter Twig code to determine the text. This is optional. If you enter a description, it displays on step 1 of the patient's invitation to book screens (field **3** in the diagram below).
	Display appointment location?	Enter whether or not to display the location of the appointments suggested to the patient. Enter text or select **Use Twig** above the field to enter Twig code to determine this. Text options are `true` or `false`. For example, if you have entered a single location in **Appointment location** above, you may enter `false` because you do not want to display the location.
	Display appointment practitioner?	Enter whether or not to display the practitioner for the appointments suggested to the patient. Enter text or select **Use Twig** above the field to enter Twig code to determine this. Text options are `true` or `false`. For example, you may enter `true` so that the patient can see the practitioner for each suggested appointment.

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Text on step 1 screens for PC and mobile phone

The following diagrams show the position of the text fields in the patient's invitation to book screens for step 1 for a PC (left) and a mobile phone (right).





Set up a pathway

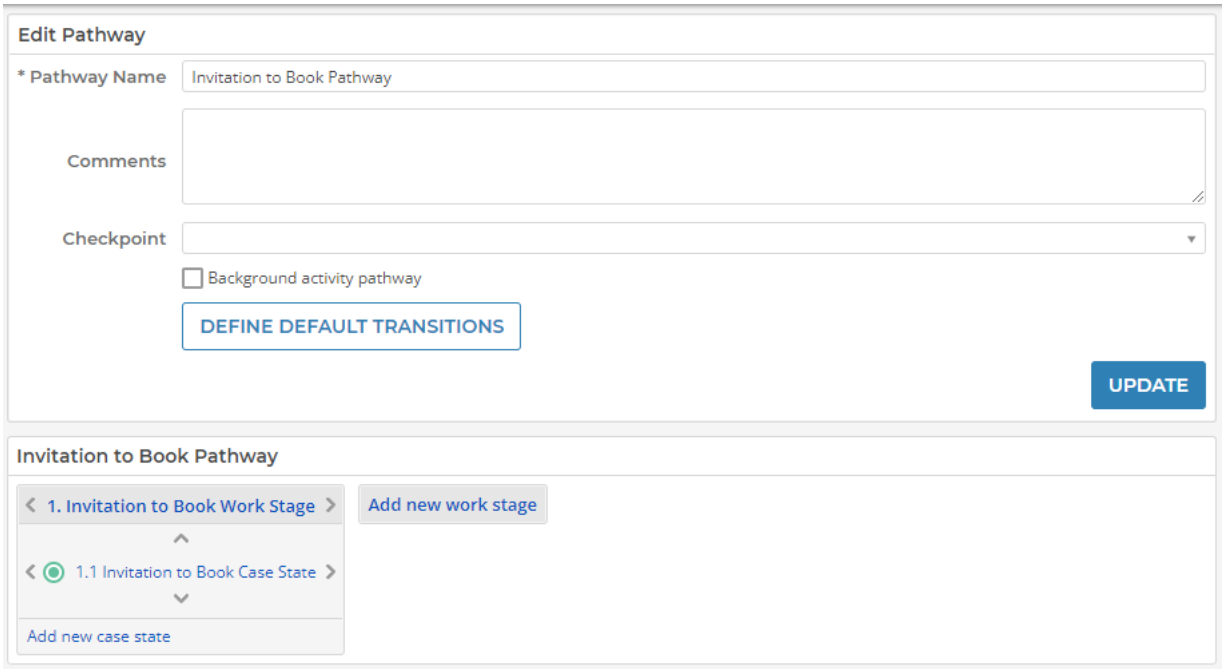
There are two steps to set up an invitation to book pathway:

1. Create the pathway. See *Create pathway (page 20)*.
2. Add a work stage and case state to the pathway. See *Add work stages and case states (page 21)*.

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Example pathway

The example in this guide creates a very simple pathway which has one work stage, **Invitation to Book Work Stage**, containing one case state, **Invitation to Book Case State**, which sends an email or SMS to a patient on this care pathway for the **Invitation to Book** activity type, as shown below. You can use this pathway to trigger an activity for a patient in the Operator UI - see *Create invitation to book activity (page 30)*.

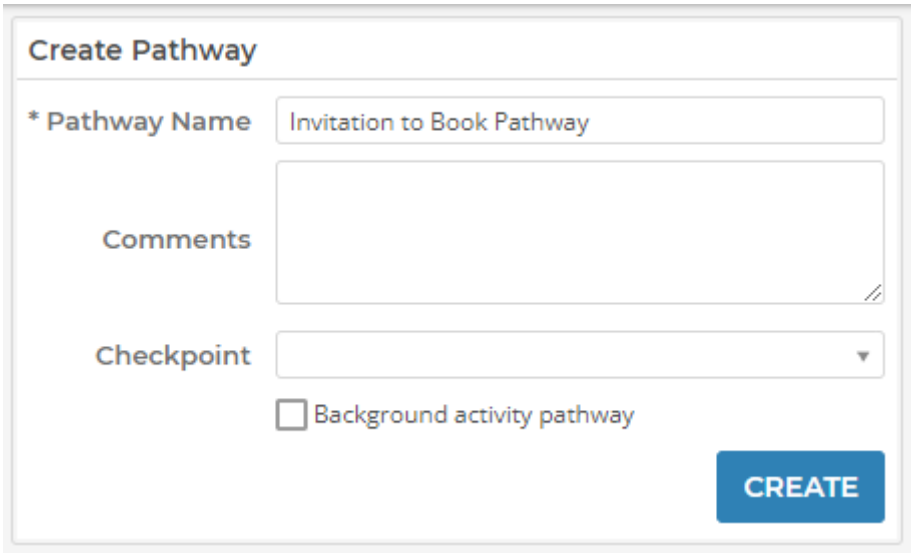


You would need to create a more complex pathway if you want to trigger the action automatically by a transition from one case state to another.

Create pathway

To create the invitation to book pathway:

1. Select **Pathways** in the **Pathway Logic** menu.
2. Enter the name of the pathway.



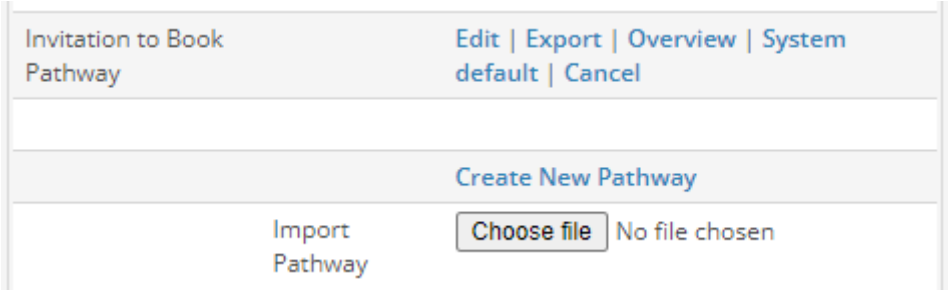
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3. Click **Create**.

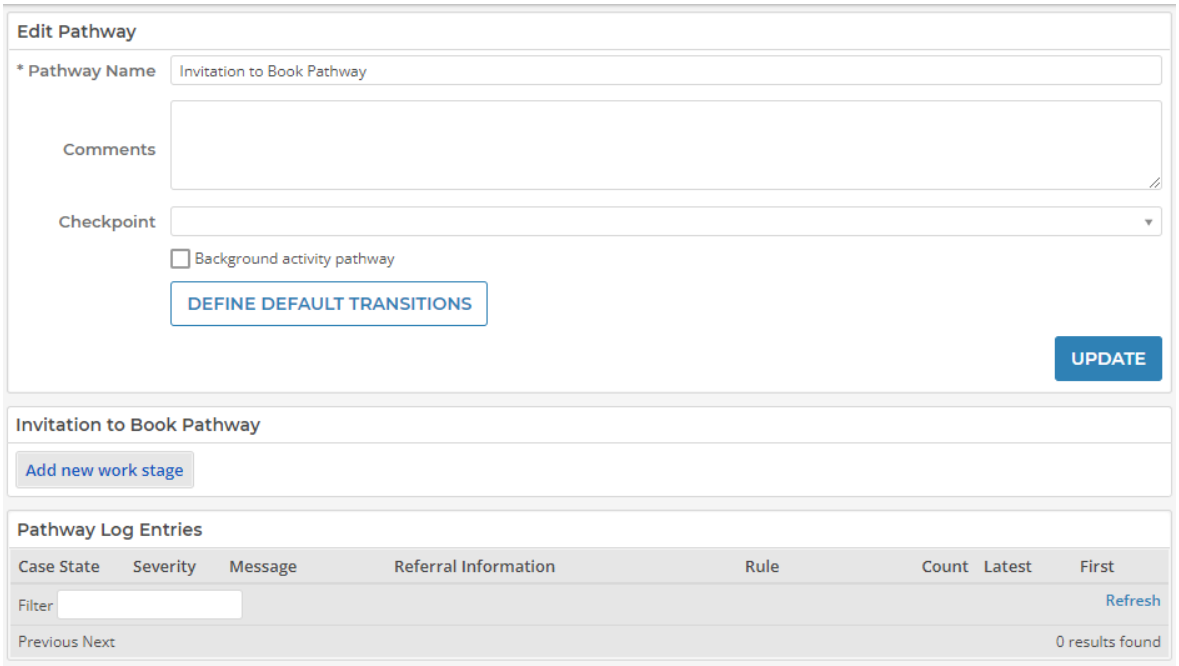
Add work stages and case states

In this example, the invitation to book pathway has one work stage and one case state. To add work stages and case states to a pathway:

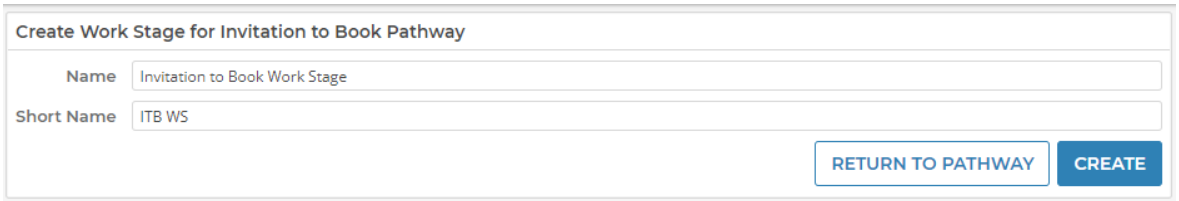
1. Click **Overview** next to the name of the pathway you have created.



This displays the **Edit Pathway** page.



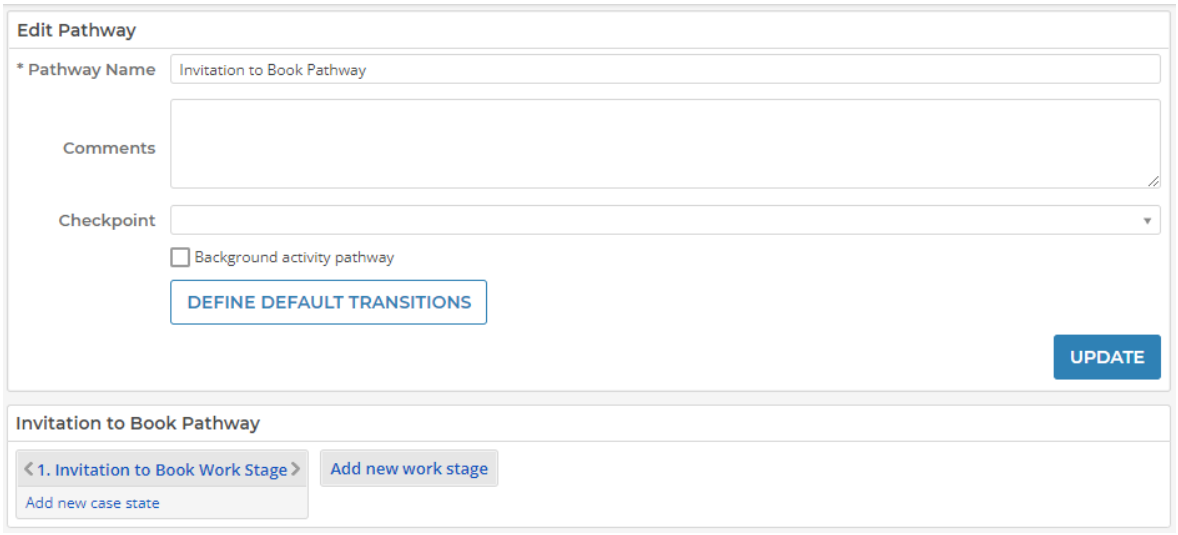
2. Click **Add new work stage**, enter a name and a short name in the **Create Work Stage** form, and click **Create**.



The **Edit Pathway** page is redisplayed.

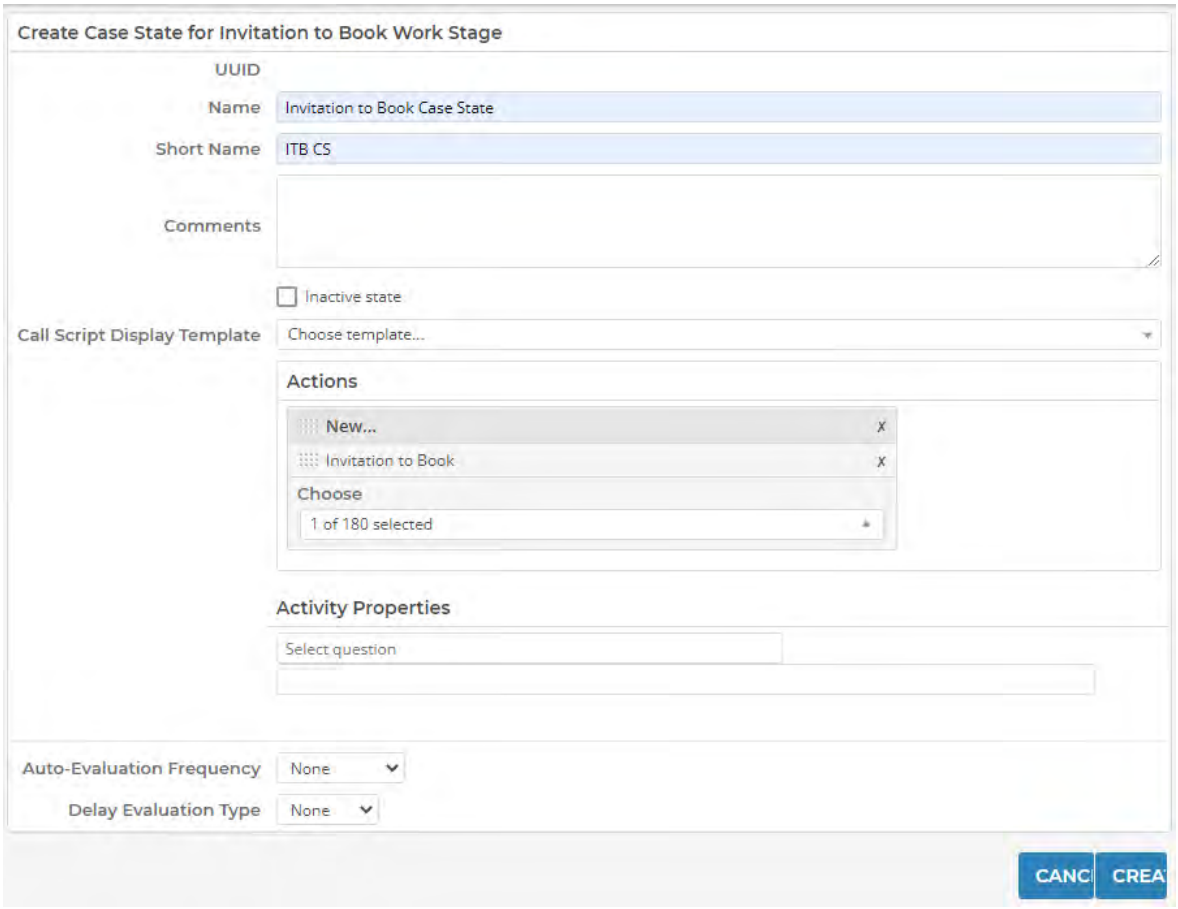
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3. Click **Add new case state** below the stage you have just created.



This displays the **Create Case State** page for the selected work stage.

4. Enter the case state name and short name, and comments if you want.



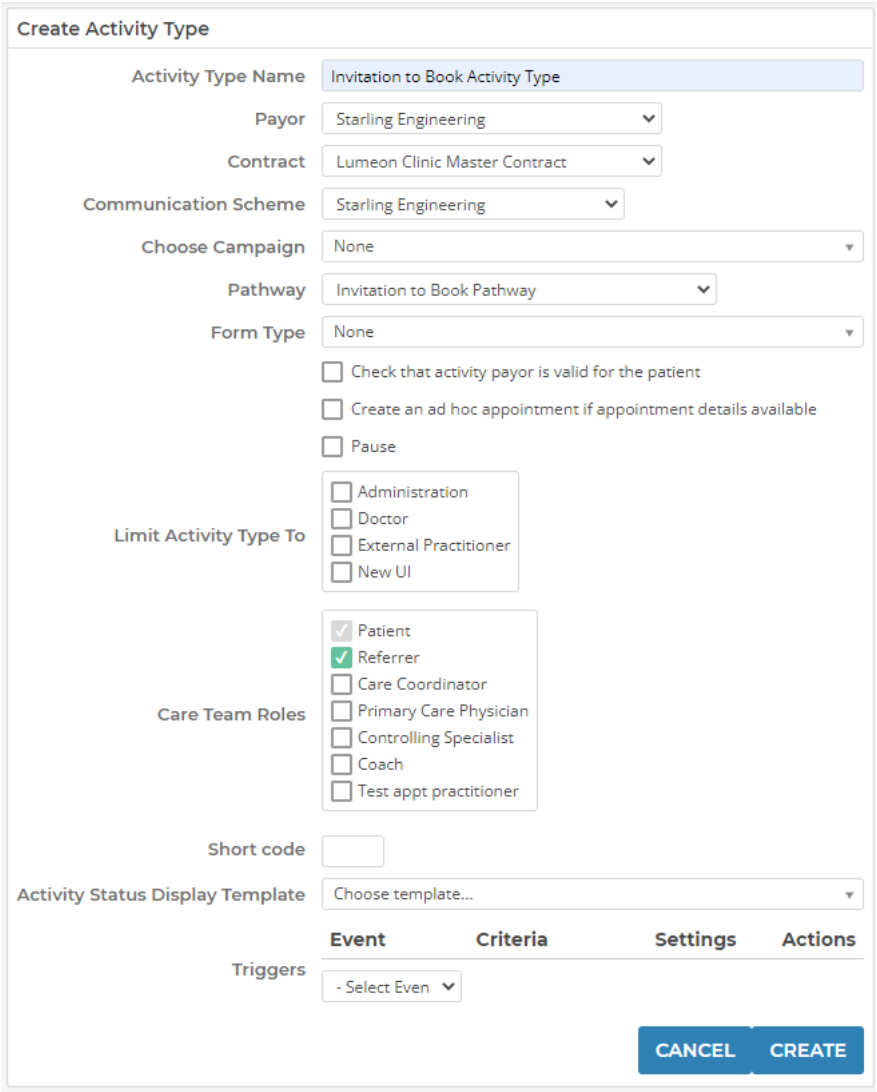
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5. Select the invitation to book action. To do this, you can do one of the following in the **Choose** field in the **Actions** section of the form:
   - Click on the up arrow, scroll through the actions and select the invitation to book action from the drop-down list. This is useful if you want to select more than one action.
   - Click in the field, start to type the name of the action, and select it from the list of matching actions.
6. Click **Create**.

Set up activity type

To set up the invitation to book activity type:

1. Select **Activity Types** in the **Pathway Logic** menu. A table of existing activity types displays on the left and the **Create Activity Type** form displays on the right.
2. In the **Create Activity Type** form, enter the name of the activity type.



3. Select the payor for the appointment that the patient is invited to book.

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4. Select the appropriate communication scheme from the drop-down list in the **Communication Scheme** field.

5. Select the appropriate pathway from the drop-down list in the **Pathway** field.

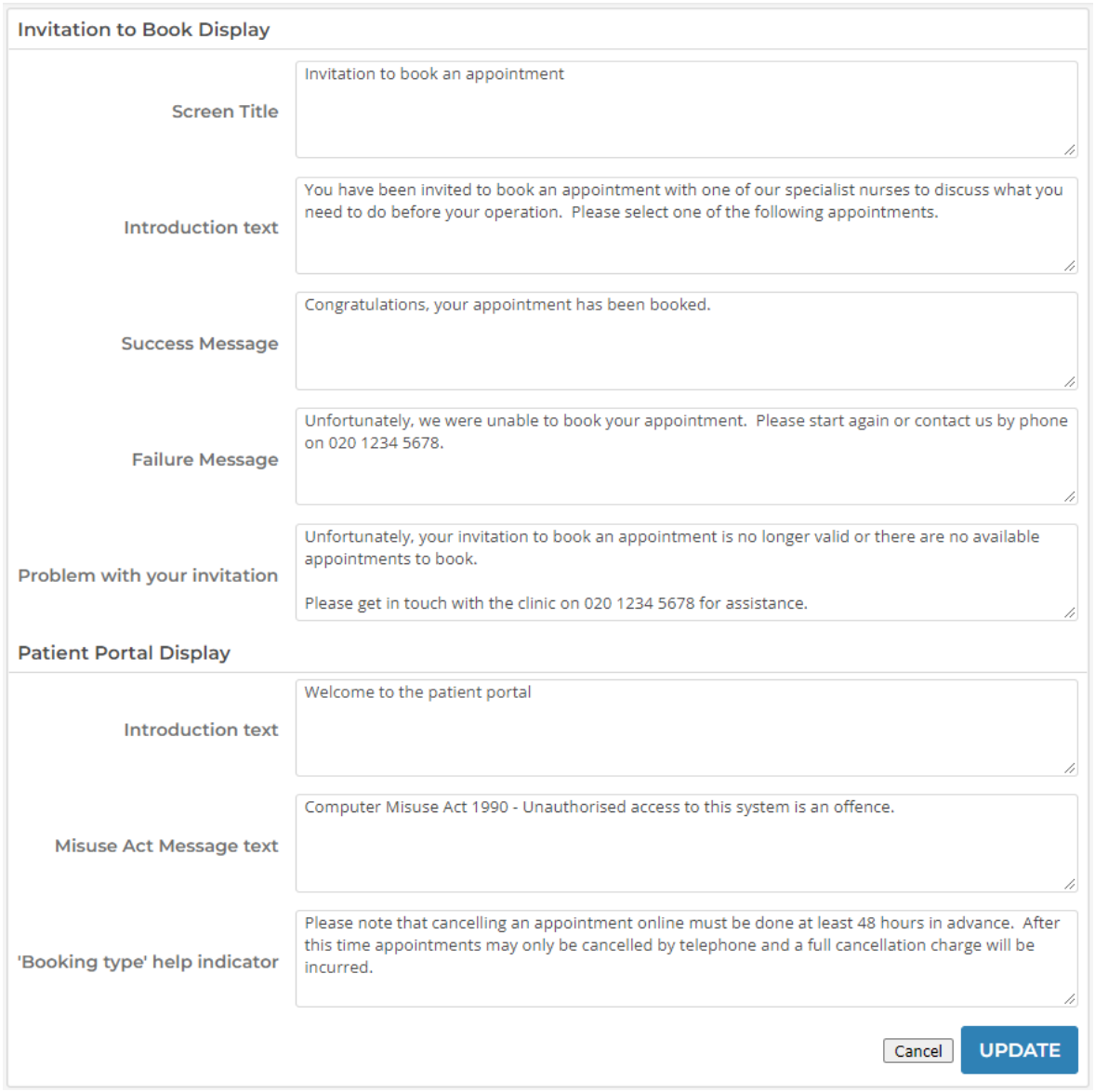
6. Click **Create**. The new activity type appears in the table of activity types on the left.

Set up invitation to book display

Before using the invitation to book functionality, you must set up how you want the invitation to book link to appear to patients. To do this:

1. Select **Display Text Configuration** in the **System Configuration** menu.

2. Enter the details in the **Invitation to Book Display** section using the *diagrams (page 26)* below and the fields in the *table (page 25)* below.



3. Click **Update** to save your values.

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Invitation to book display fields

Use the following table to complete the details for the invitation to book display. The numbers refer to the numbers in the diagrams below.

These fields define how the screen displays for patients who click on the invitation to book link. The text is the same for all devices so please ensure that they are not too long for displaying on a mobile phone.

Number	Field	Description
1	Screen Title	Enter the title for the invitation to book screen. For example: `Invitation to book an appointment`
2	Introduction Text	Enter the introductory text you want to appear on the invitation to book screen. For example: `You have been invited to book an appointment with one of our specialist nurses to discuss what you need to do before your operation. Please select one of the following appointments.`
4	Success Message	Enter the message you want to display if the patient successfully books an appointment. For example: `Congratulations, your appointment has been booked!`
5	Failure Message	Enter the message you want to display if the patient is unsuccessful in booking an appointment. This might happen if the appointment selected by the patient is no longer available. For example: `Unfortunately, we were unable to book your appointment. Please start again or contact us by phone on 020 1234 5678.`
6	Problem with your Invitation	Enter the text you want to display to the patient if there was a problem with booking their appointment. This could be if the invitation to book link has expired. For example: `Unfortunately, your invitation to book an appointment is no longer valid or there are no available appointments to book. Please get in touch with the clinic on 020 1234 5678 for assistance.`

Optional description

In addition to the fields on the Invitation to Book Display screen, you can enter an **ITB description text** field when you set up the invitation to book action. This is optional extra text that displays below the **Introduction Text** (field **3** in the *diagrams (page 26)* below). For example:

`Please select one of the following appointments or click SHOW MORE to display more appointments.`

See *Set up invitation to book action (page 14)* for information on how to do this.

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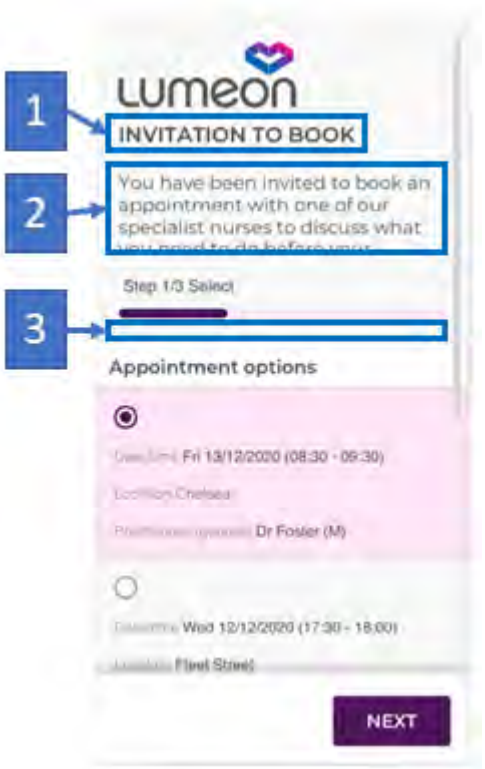
Patient invitation to book text fields

The following diagrams show the positions of the text fields on the patient's invitation to book screens.

Text on step 1 screens for PC and mobile phone

The following diagrams show the position of the text fields in the patient's invitation to book screens for step 1 for a PC (left) and a mobile phone (right).

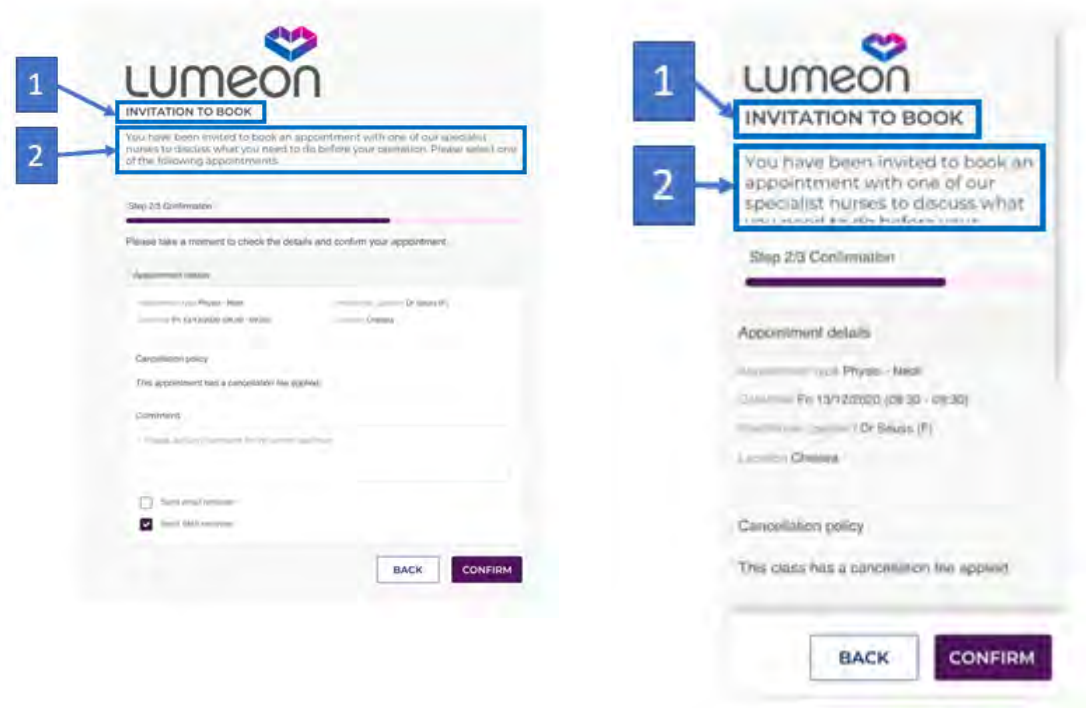




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Text on step 2 screens for PC and mobile phone

The following diagrams show the position of the text fields in the patient's invitation to book screens for step 2 for a PC (left) and a mobile phone (right).



Text on step 3 success screens for PC and mobile phone

The following diagrams show the position of the text fields in the patient's invitation to book screens for step 3, when the booking has been successful, for a PC (left) and a mobile phone (right).

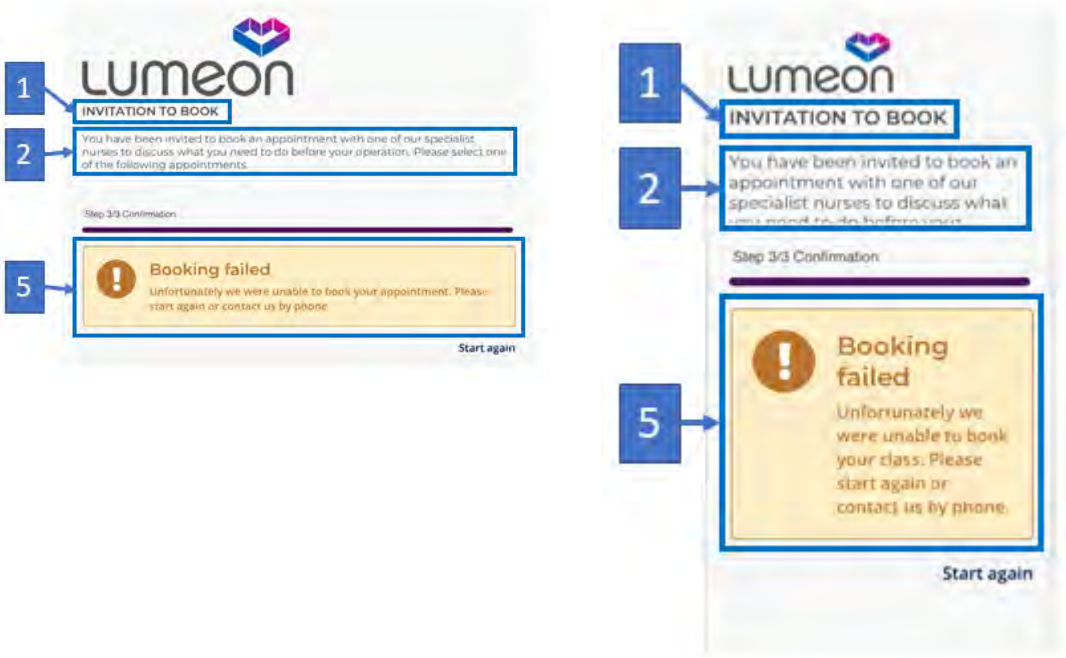




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Text on step 3 failure screens for PC and mobile phone

The following diagrams show the position of the text fields in the patient's invitation to book screens for step 3, when the booking has been unsuccessful, for a PC (left) and a mobile phone (right).



Text on problem screens for PC and mobile phone

The following diagrams show the position of the text fields in the patient's invitation to book screens when there is a problem with the booking, for a PC (left) and a mobile phone (right).



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Create activity and trigger invitation to book

Once all the initial configuration and setup has been done, you can create an invitation to book activity for an individual patient and send the email or SMS to them containing the invitation to book link.

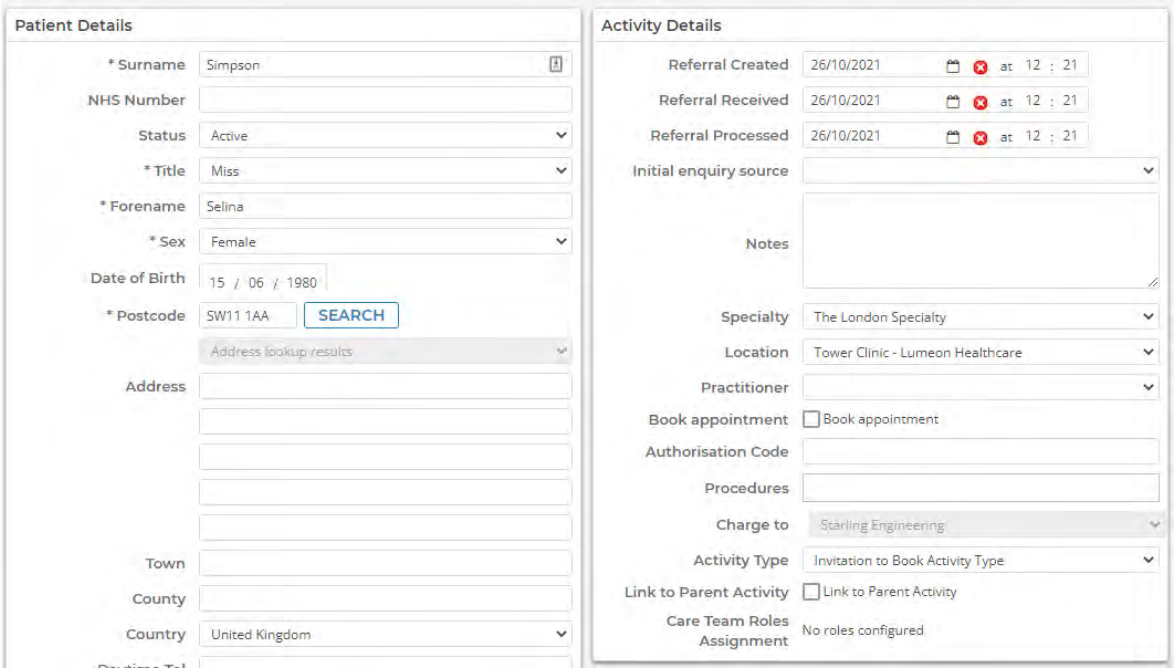
Create invitation to book activity

To create an invitation to book activity:

1. Select **New Activity** in the top menu bar, or select **Worklists** on the left hand end of the top menu bar and select **New Activity** in the **Worklists** menu.

2. In the **Patient Details** section on the left hand side of the page, search for the patient that you want to send an invitation to book message to by starting to type their last name in the **Surname** field and selecting their name.

3. In the **Activity Details** section on the right hand side of the page, select the invitation to book activity type from the drop-down list in the **Activity Type** field.



4. Scroll to the bottom of the page and click **OK** to save the activity.

5. A message displays saying that the activity has been successfully created. Click the word **Activity** to display the **Activities** page for the patient.



See *Trigger invitation to book activity for a patient (page 31)* to create the email or SMS containing the invitation to book link for the patient.

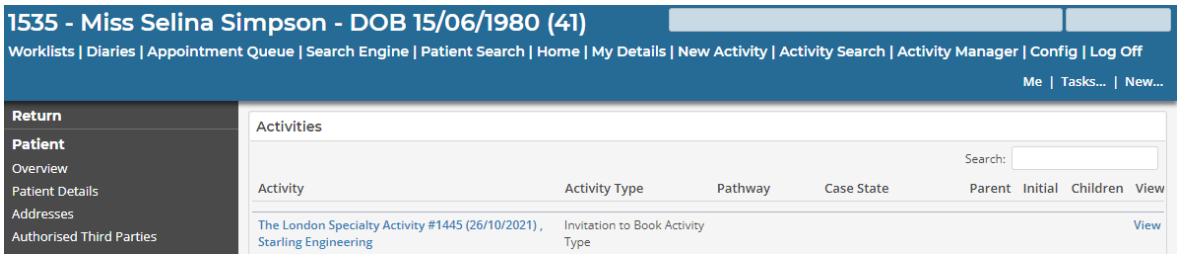
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Trigger invitation to book activity for a patient

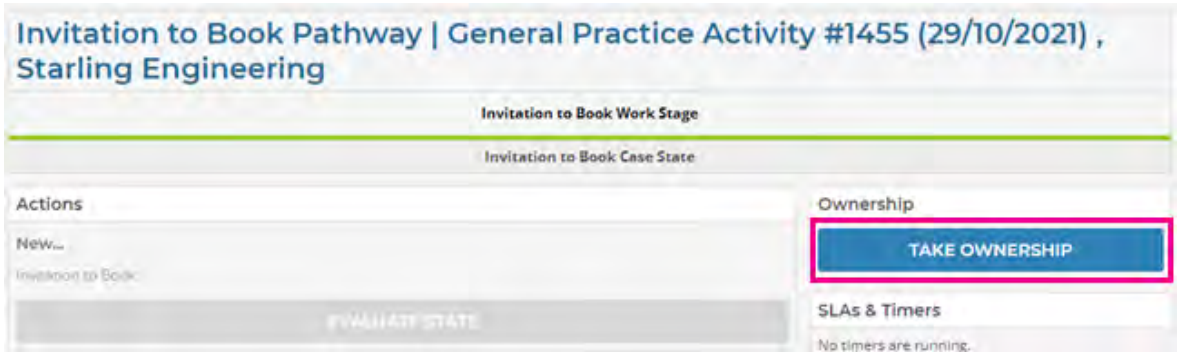
You may have clicked on the message when you created the invitation to book activity for the patient - see *Create invitation to book activity (page 30)*. If so, start at *step 4 (page 31)* below.

Otherwise, to trigger the invitation to book activity for a patient:

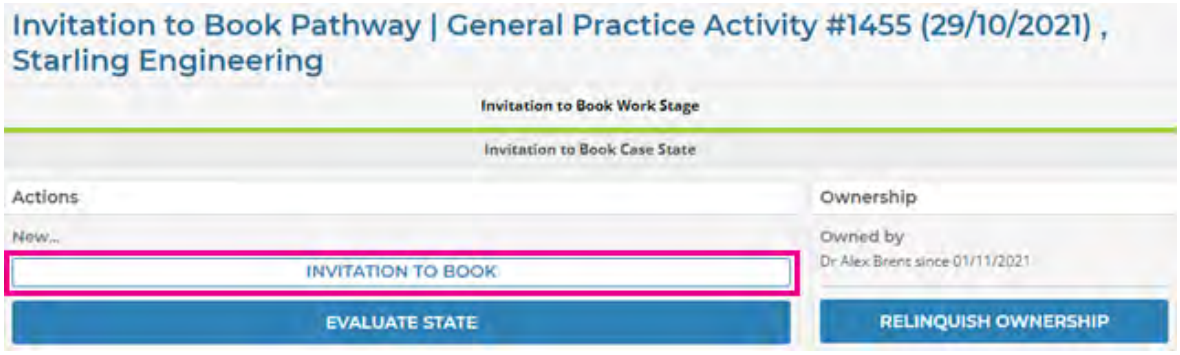
1. Select **Patient Search** in the top menu bar, start typing the patient's last name and select the patient from the drop-down list.
2. Select **Activities** in the **Patient** menu.
3. Click the name of the invitation to book activity to display the details.



4. Click **Take Ownership** so that you own the activity.

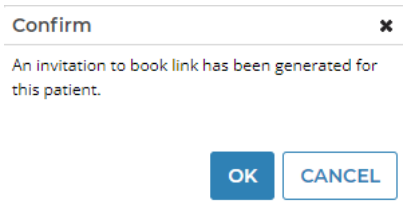


5. Click **Invitation To Book**.

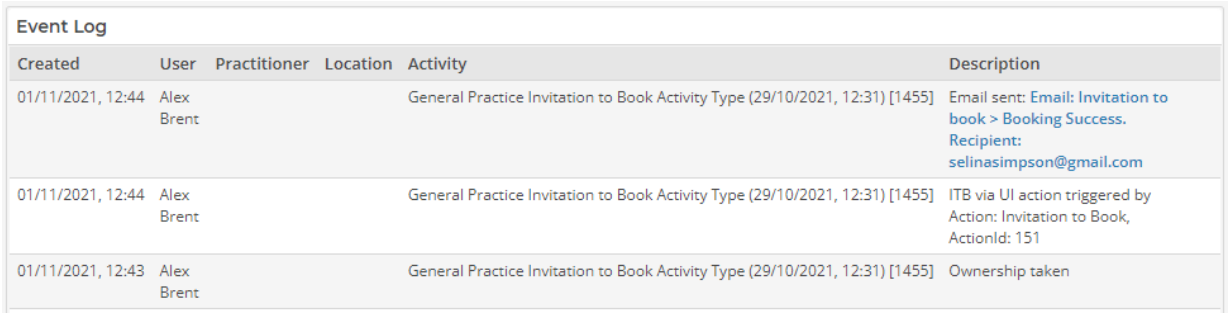


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6. Based on the invitation to book setup and the patient's communication preferences, the invitation to book link is generated and an email or SMS is sent to the patient. A confirmation message is displayed if it has been set up in the action.

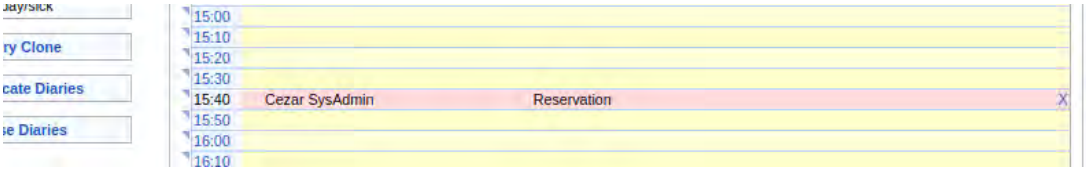


You can view the invitation to book details in the **Event Log** section at the bottom of the patient's **Activities** page.



View the appointment

After the patient has confirmed the appointment, it appears in the practitioner's diary as a **Reservation**. Administrators and practitioners can view the appointment in the diary.



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Invitation to book as a patient

The invitation to book link generated by the activity is included in the email or SMS sent to the patient. The patient can view the link on a desktop, laptop, or mobile phone. For example, an email sent to a patient might look like this:

From: admin@lumeonhealthcare.com <admin@lumeonhealthcare.com>
Sent: 09 November 2021 13:24
To: selina.simpson@gmail.com>
Subject: Invitation to book an appointment

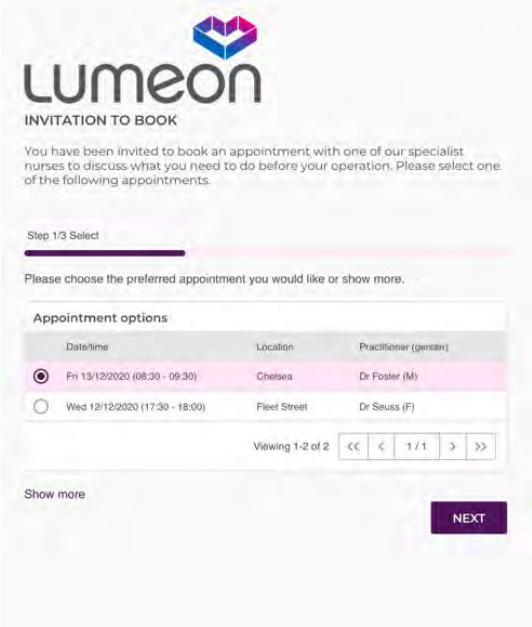
Here is the link to your invitation to book an appointment:
https://documentation2.lumeon.com/s/sYhDCI

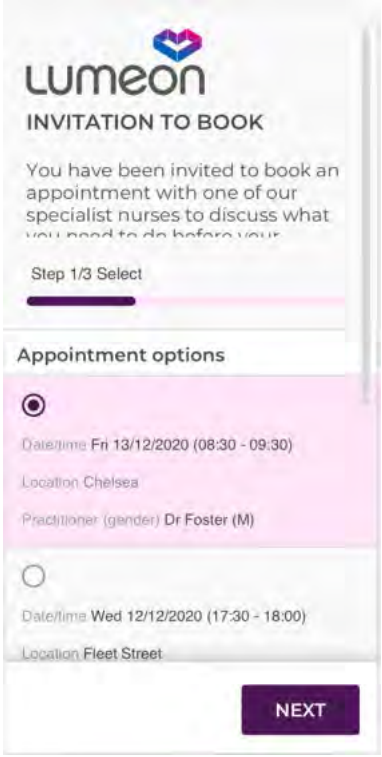
Regards
Lumeon Healthcare

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When the patient receives the email or SMS, they take the following steps:

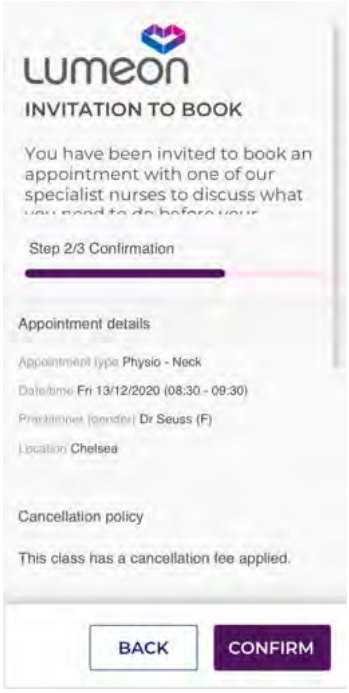
1. Click on the link in the email or SMS to display step 1 of the appointment booking process. The screen displays in the correct format for a PC or mobile phone, depending on the device that the patient is using.





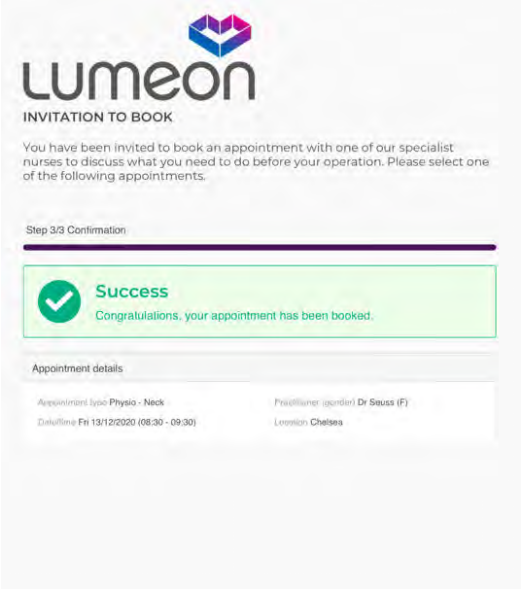
2. Select the required appointment option and click **Next** to display step 2 of the appointment booking process.

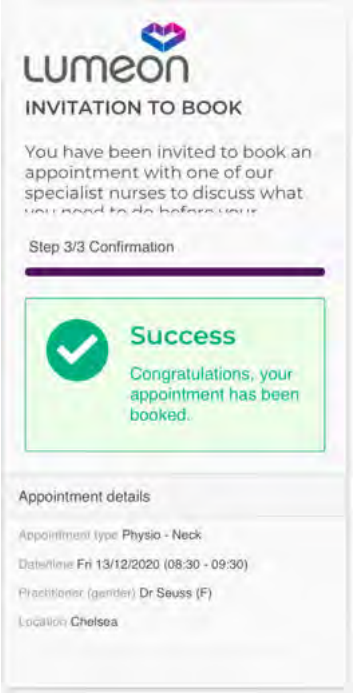




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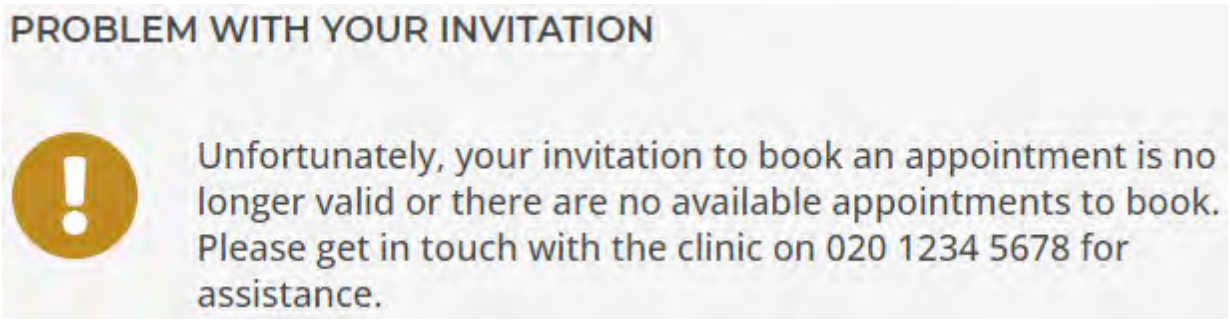
3. Check the appointment details and:
   - Click **Confirm** to confirm the appointment and display step 3 of the appointment booking process.
   - Click **Back** to return to the appointment options.
4. Step 3 displays whether:
   - The appointment has been booked successfully and confirms the appointment details.





   - The booking failed and allows the patient to start again.

If there is a problem with the invitation to book link, for example, if it has expired or if there are no valid appointments, a message is displayed. For example:



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Supported browsers for the patient invitation to book link

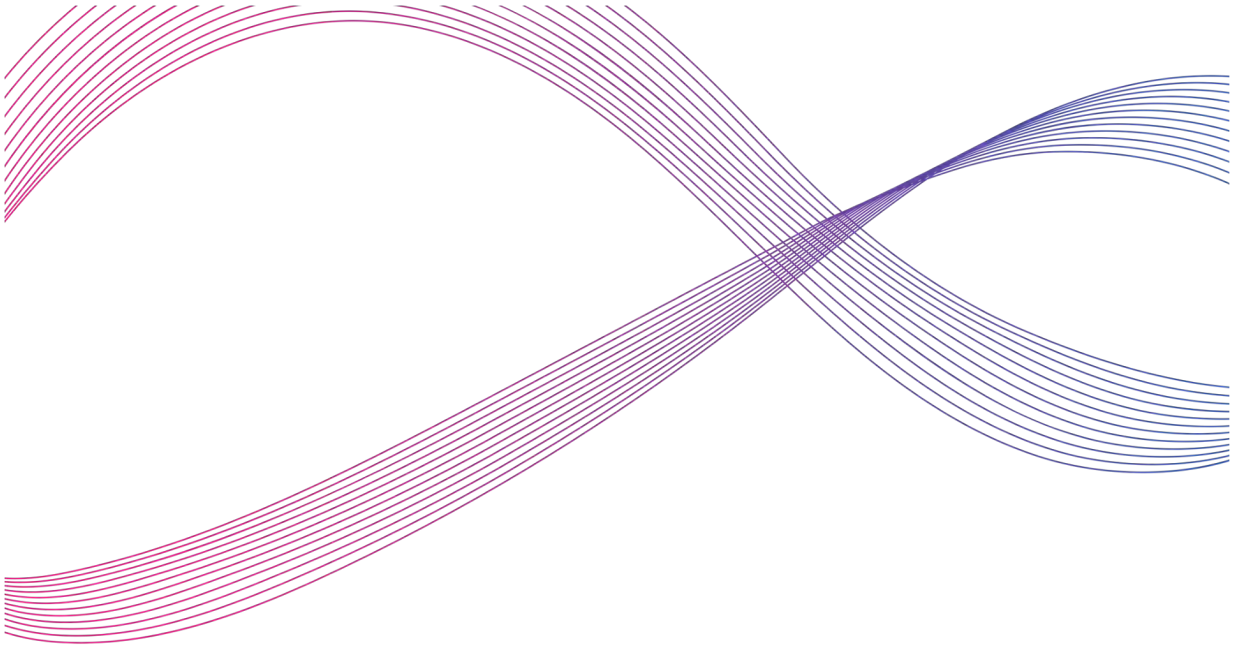
Patients can access the invitation to book link on many different web browsers and devices.

Conductor supports the current version, and the last three versions, of the following browsers:

- Google Chrome 81+
- Safari 11+
- Edge 81+
- Firefox 76+
- Internet Explorer 11

If a patient attempts to access the invitation to book link on an unsupported browser, an **Unsupported Browser** page is displayed. This page enables users to download the latest version of their preferred browser.

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Letter & Email Templates in Lumeon's Product 24.2

Issued by: Lumeon Learning
Date of issue: August 2024

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Introduction

In Lumeon's product, you can set up a wide range of letters and emails to be used for appointment confirmations, debt chasing, promotions, and so on.

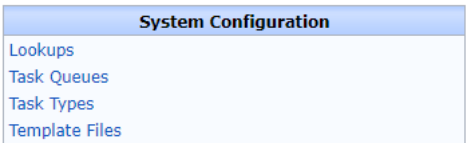
You can also configure these letters and emails to contain different attachments depending on location, appointment type, payor, or company.

This document also includes information about how to set up financial statements such as invoices, receipts, and credit notes. Whilst not strictly letters, they are created and saved in Lumeon in a similar way.

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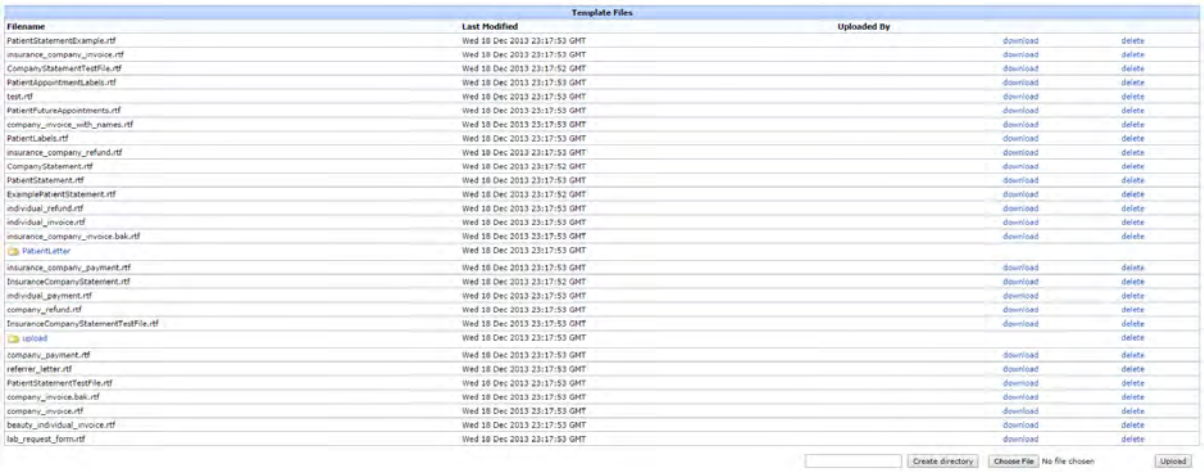
Template files

Select **Template Files** in the **System Configuration** menu to display all core and custom communication templates.



You can download and edit these template files .

The top level of template files contains the templates for financial statements and labels. You must save and store patient letter templates in the **Patient Letter** folder.



You can create and edit template files to contain a company logo, standard header and footers.

You can have many different types of letter templates all using the same RTF template file.

To upload a new template file, use Microsoft Word (or equivalent) and ensure the file contains the relevant merge tags, as found in the appendices.

You must save the template as an RTF file, not a Word file. Merge tags locate the corresponding data as stored within Lumeon, and populate the data in the document.



Sometimes copying and pasting merge tags prevents them from working. If this happens, delete the merge tags and manually retype them.

Also, avoid reformatting text after manually typing merge tags, because this can occasionally cause the merge tags to stop working.

See the sections below for common merge tags that you may want to include in your template file.

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Once you have created the template file, click **Choose file**, select the chosen file and click **Upload**.

Body text

If there is a section of text that will not be standard across a number of templates, but the same basic template could be used for the rest of the letter, the text can be replaced with the merge tag **<<body_text>>**. The **<<body_text>>** merge tag can only be used once in a template.



You cannot use the merge tag **<<body_text>>** in **Appointment Create** letter templates, which are automatically generated by Lumeon.

Embed a logo in the template file

If you want to include a logo for a company or an insurance company in the letter template file, insert the merge tags **<<start_charge_to_logo>>** and **<<end_charge_to_logo>>** where you want the logo to appear. Between these two tags insert a placeholder image of the desired size. This ensures that the layout of the page remains the same when the letter is generated.

See *Embed a company logo in a letter (page 10)* and *Embed an insurance company logo in a letter (page 11)*.

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Embed a location logo in the template file

If you want to include a logo for a location in the letter template file, insert the merge tags **<<start_appointment_centre_logo>>** and **<<end_appointment_centre_logo>>** where you want the logo to appear. Between these two tags insert a placeholder image of the desired size. This ensures that the layout of the page remains the same when the letter is generated.

See *Embed a location-specific logo in a letter (page 9)*.

Edit a template file

If you need to edit a letter in the future, you can navigate to the same location, download and edit the file.

Once you have edited it, re-upload the file so it is ready for use.

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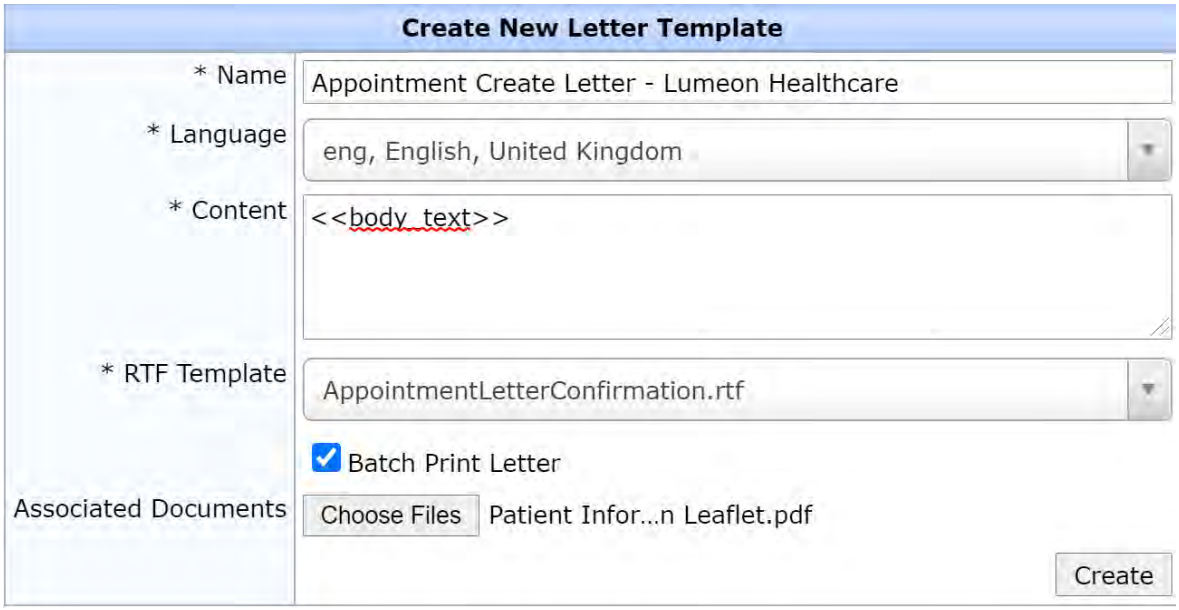
Letter templates

Create a letter template

Before you create a new letter template, you must have created a suitable template file. See *Template files (page 4)*.

To create a new letter template:

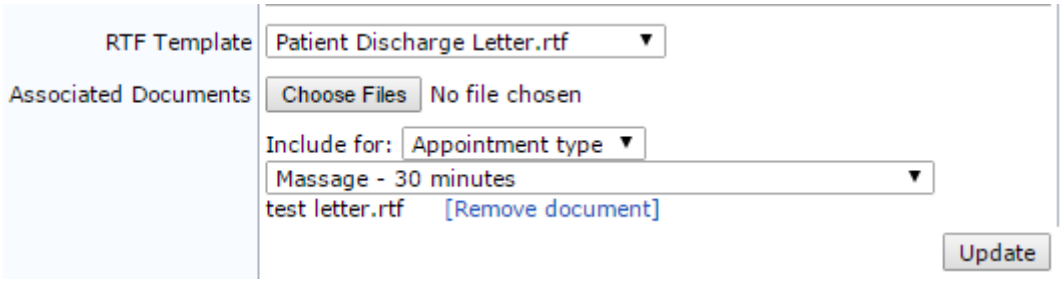
1. Select **Letters** in the **Communications** menu to display the **Letter Template Management** page. The **Letter Template Management** page displays a table of existing letter templates on the left, and a **Create New Letter Template** form on the right.



2. In the **Create New Letter Template** form, enter a name for the template in the **Name** field.
3. Select the language option for the new template, from the options shown in the drop-down menu.
4. Enter the text in the **Content** field that you want to be displayed in the body of the letter, where the `<<body_text>>` merge tag appears. This allows the letter text to be further modified when the letter is generated for a patient. See *Appendices (page 30)* for merge tags you can use.
5. Select the relevant RTF template file to be associated with the new letter template.
6. Select the **Batch Print Letter** check box if you want the letter to be eligible for batch printing and can therefore be added to a batch print job.

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7. To attach associated documents to a letter template, such as additional information pages or maps, to a letter, select **Choose Files** next to **Associated Documents**, select the file required and click **Create** or **Update**. Attached files must be in PDF, RTF, or Word format. Then select for which location, payor type, appointment type or company sector this file will be included.

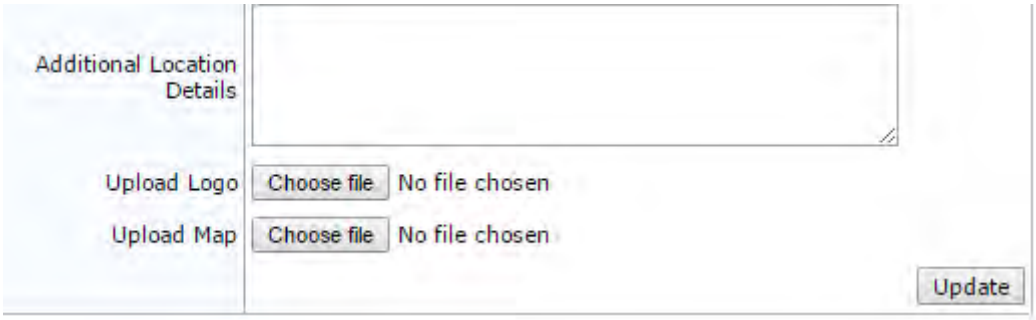


8. Click **Create** to save the new template and add the document to the table of existing letter templates. This new document is then available to generate letters using the **Create Letter** option in the **Tasks** menu of a patient record - see *Generate a letter for a patient (page 14)*.

Embed a location map in a letter

To embed a location map:

1. Select **Locations** in the **Diary** menu and select the location whose logo you want to use.
2. Click **Choose file** next to the **Upload Map** field and select the image file of the location map that you want to upload.



3. Once the map has been uploaded, click **Update** to save the map for the location.
4. In the letter template file, insert the merge tags `<<start_appointment_centre_map>>` and `<<end_appointment_centre_map>>` where you want the map to appear. See *Template files (page 4)*.

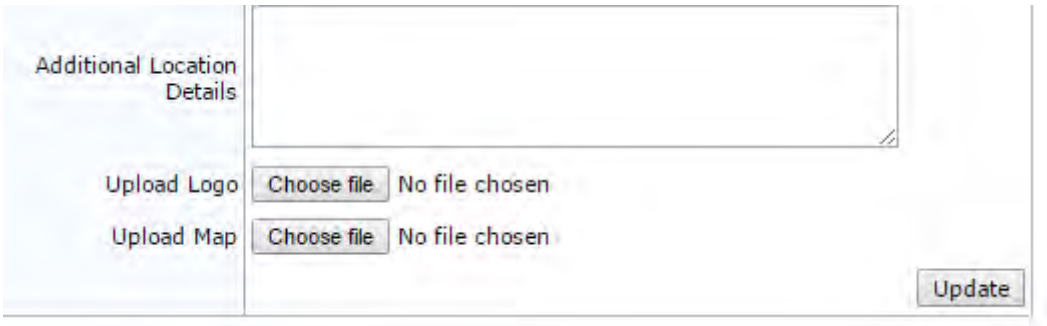
   Insert a placeholder image of the desired size between these two merge tags. This ensures that the layout of the page remains the same when the letter is generated.

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Embed a location-specific logo in a letter

To embed a location-specific logo in a letter:

1. Select **Locations** in the **Diary** menu and select the location whose logo you want to use.
2. Click **Choose file** next to the **Upload Logo** field and select the image file of the location's logo that you want to upload.



3. Once the logo has been uploaded, click **Update** to save the logo for the location.
4. In the letter template file, insert the merge tags `<<start_appointment_centre_logo>>` and `<<end_appointment_centre_logo>>` where you want the logo to appear. See *Template files (page 4)*.

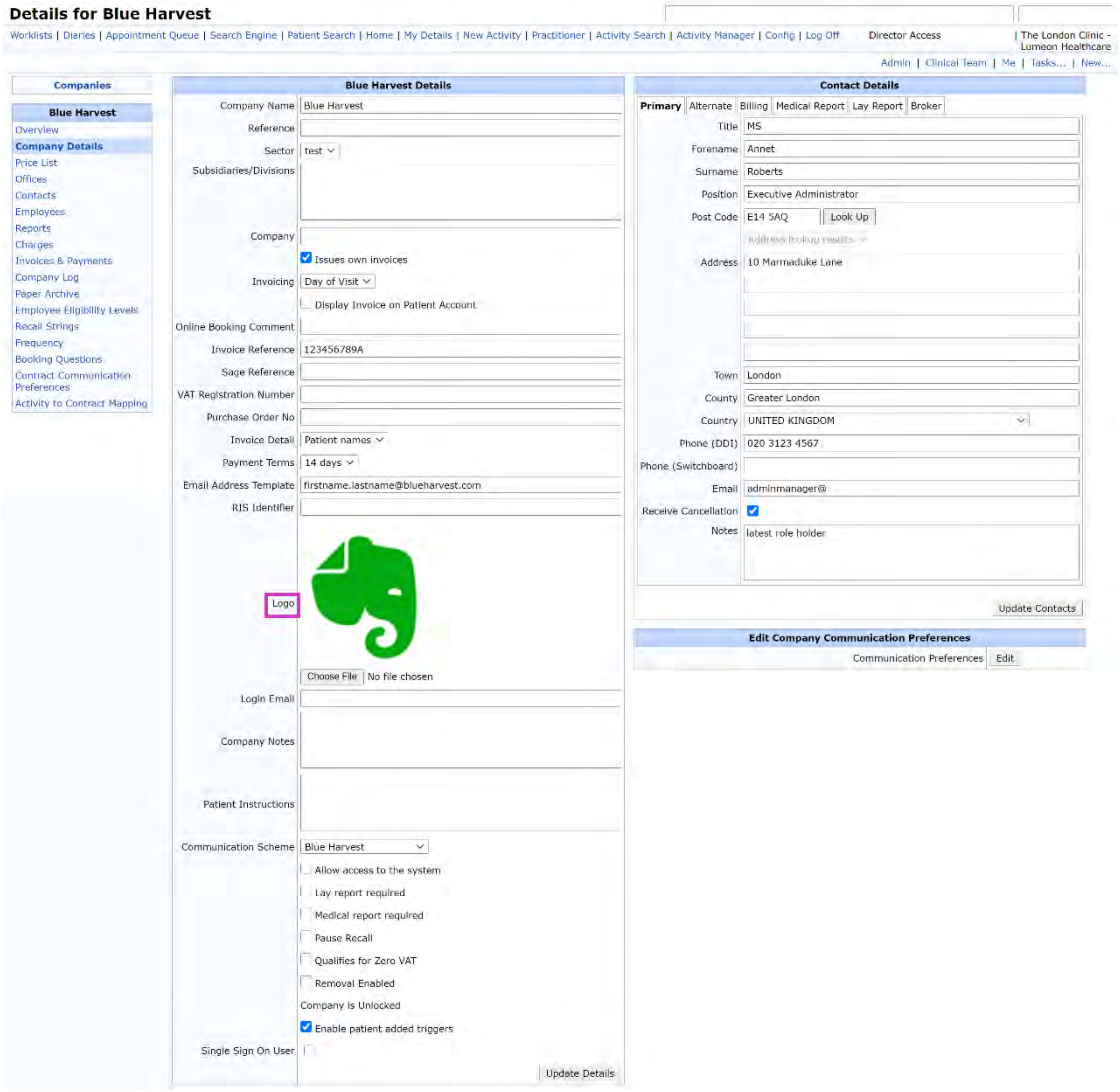
   Insert a placeholder image of the desired size between these two merge tags. This ensures that the layout of the page remains the same when the letter is generated.

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Embed a company logo in a letter

To embed a company logo within a letter template:

1. Select **Companies** in the **People** menu and search for the company whose logo you want to use. The **Company Overview** page is displayed. Select **Company Details** in the company's menu on the left hand side.



2. Click **Choose File** next to the **Logo** field and select the image file of the company's logo that you want to upload.

3. Once the logo has been uploaded, click **Update Details** to save the logo on the company's record.

4. In the letter template file, insert the merge tags **<<start_charge_to_logo>>** and **<<end_charge_to_logo>>** where you want the logo to appear. See *Template files (page 4)*.

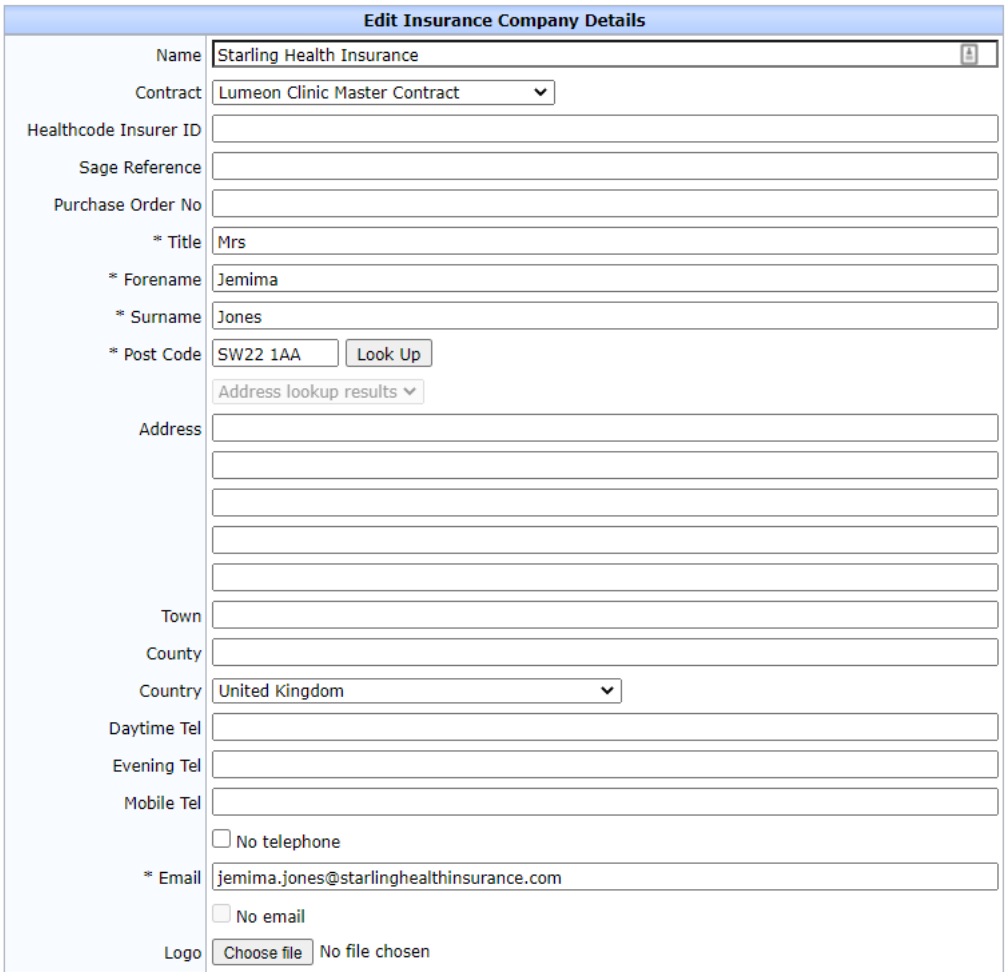
   Insert a placeholder image of the desired size between these two merge tags. This ensures that the layout of the page remains the same when the letter is generated.

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Embed an insurance company logo in a letter

To embed an insurance company logo within a letter template:

1. Select **Insurance Companies** in the **People** menu to display the **Insurance Company Management** page. Select the insurance company from the **Insurance Companies** table on the left hand side of the page to display the details in the **Edit Insurance Company Details** form on the right hand side.



2. Click **Choose File** next to the **Logo** field and select the image file of the insurance company's logo that you want to upload.

3. Once the logo has been uploaded, click **Update Details** to save the logo on the insurance company's record.

4. In the letter template file, insert the merge tags `<<start_charge_to_logo>>` and `<<end_charge_to_logo>>` where you want the logo to appear. See *Template files (page 4)*.

   Insert a placeholder image of the desired size between these two merge tags. This ensures that the layout of the page remains the same when the letter is generated.

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Link an appointment confirmation letter to a product or location

When an appointment or class is booked, if the **Create confirmation letter** checkbox has been selected, Lumeon automatically generates a booking confirmation letter.

You can view and print this by selecting **Create Letter** in the **Tasks** menu within the patient's account.

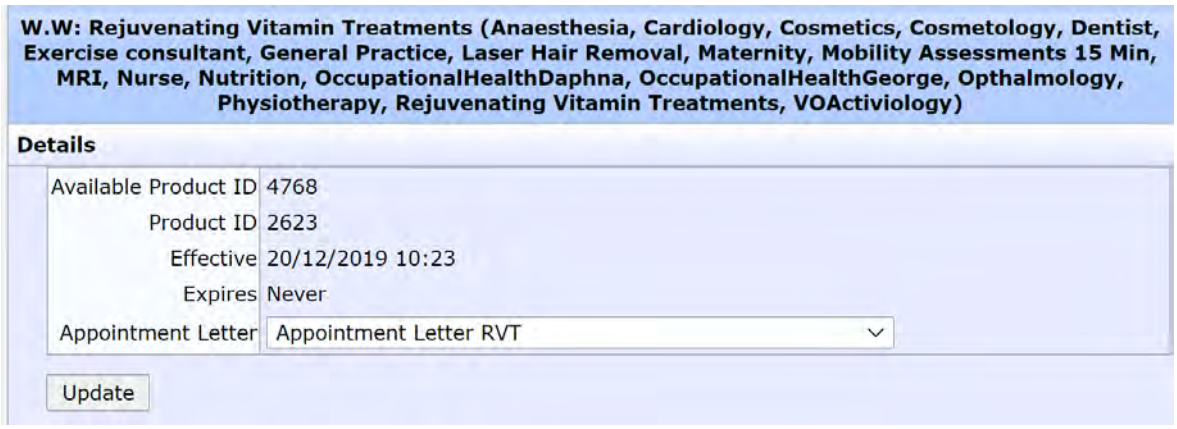
By default, the letter is generated using the **Appointment Create** letter template. However, you can customize Lumeon to generate specific letters by:

- Linking a letter template to a specific product, such as an appointment or a class - see *Link a letter to a product (page 12)*.
- Linking a letter template to a specific location - see *Link a letter to a location (page 13)*.

Link a letter to a product

To link a letter to a product:

1. Select **Contracts** in the **Products** menu, and expand the required contract to locate the appointment or class.
2. Expand **Available Products** and click **Appointments** or **Classes**.
3. Locate and select the appointment or class name to display the product details in the form on the right.
4. In the **Details** section, select the appointment letter template that you want to use from the options listed in the **Appointment Letter** drop-down menu. The **[Default]** is the **Appointment Create** letter template.



5. Click **Update** to save the changes.

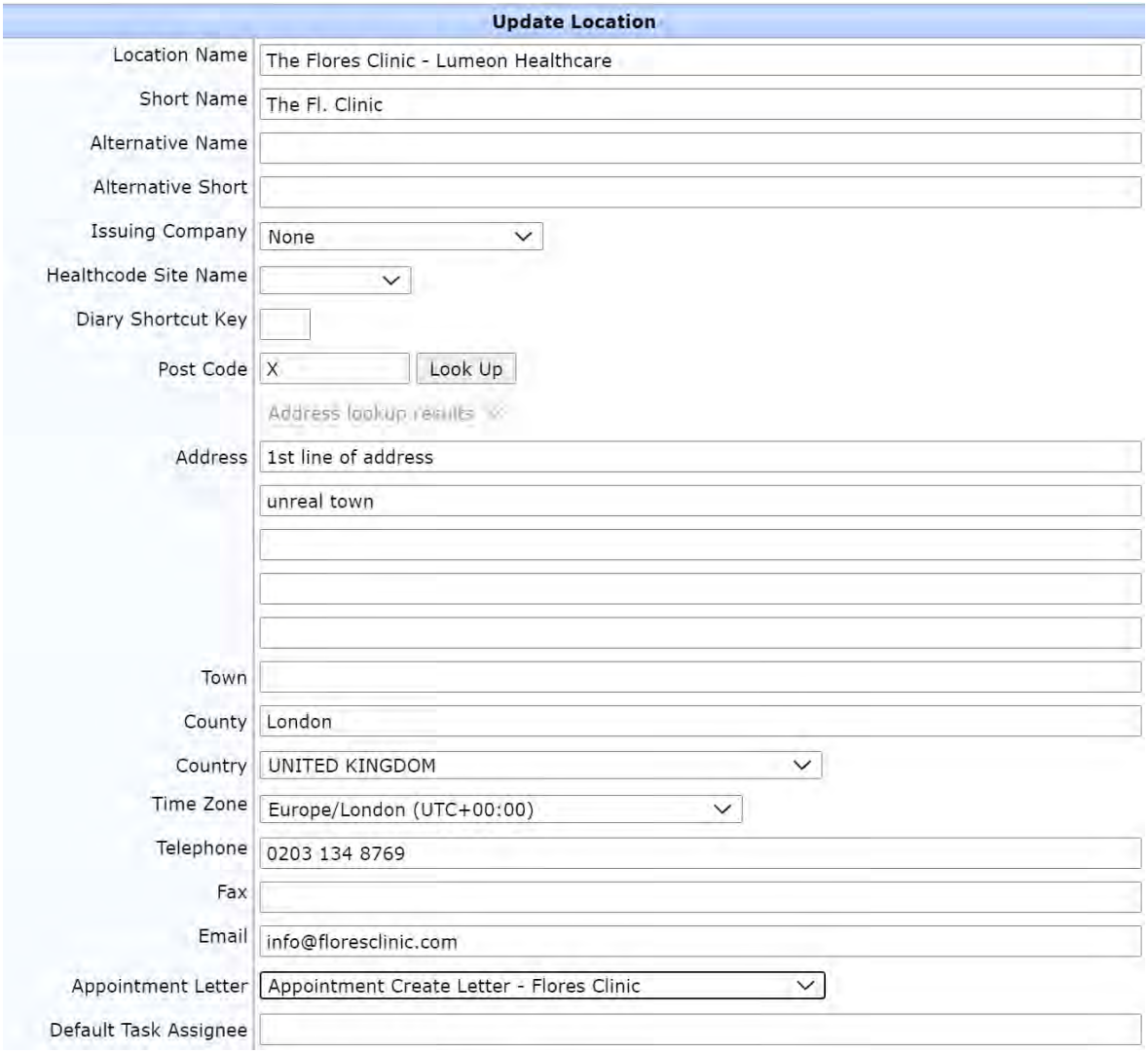
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6. Repeat this process for other appointments or classes, as required.

Link a letter to a location

To link a letter to a location:

1. Select **Locations** in the **Diary** menu to display the **Location Management** page.
2. Select the name of the location from the **Locations** table to display the **Room Management** page for the location.
3. Scroll to the **Appointment Letter** field in the **Update Location** form, and select the appropriate letter template from the drop-down list.



4. Click **Update** to save the changes.
5. Repeat this process for other locations as required.

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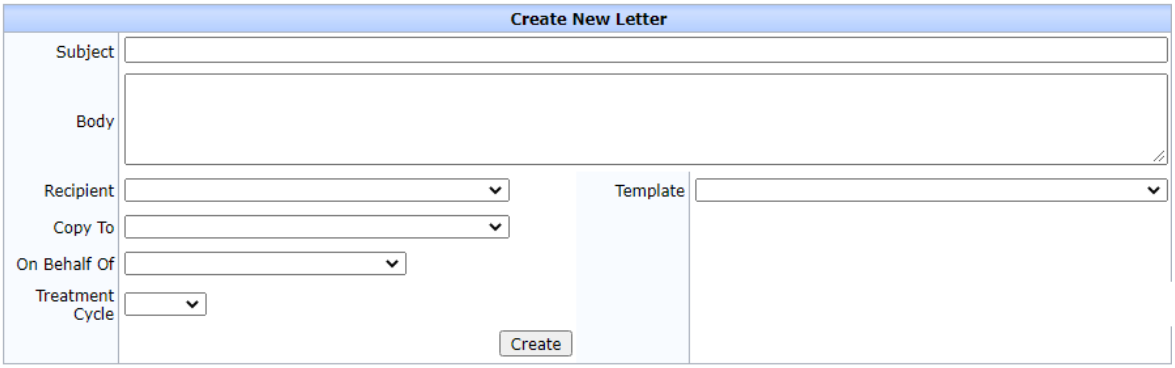
Generate a letter for a patient

To generate a letter for a patient:

1. Search for the patient and select **Create Letter** in the **Tasks** menu.



2. In the **Create New Letter** form, enter a name for the letter in the **Subject** field.



3. In the **Template** field, select the relevant template from the drop-down menu.
4. If text was entered into the **Content** field when the letter template was created, it appears in the **Body** field, where you can change it as necessary.
5. Select the **Recipient** of the letter. Depending on the patient, this may be:
   - The patient
   - The patient's insurance company
   - The alternate invoicee
   - The patient's GP

   Select one of these to generate the full name and address details for the letter recipient. Select **Other** to search for an external practitioner, either by surname or by clinic.
6. You can select **Copy To** and **On Behalf Of** recipients. The **On Behalf Of** drop-down provides a list of internal practitioners to select from.
7. You can also like a letter to **Treatment Cycles**.

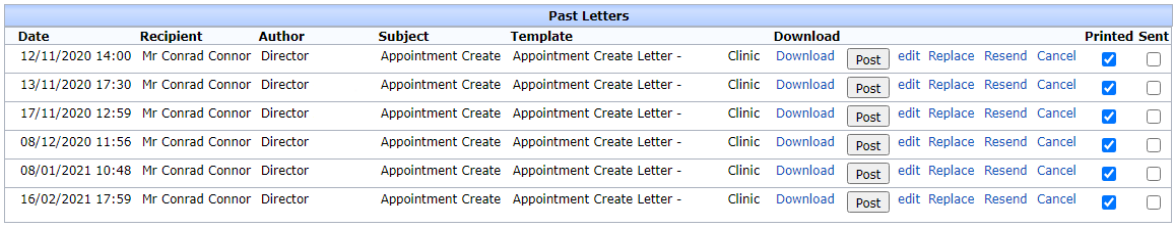
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8. When all details are correct, click **Create** to generate the patient letter. This action adds the letter to the list of **Past Letters** in the table below, as well as the patient's **Document List**.

   When Lumeon creates a patient letter file for a patient, the file name, by default, is the letter template name followed by the letter ID, for example, **GP-Appointment-Letter-12345**. Alternatively, a particular code can be set at a system level which is used for all letter files, for example, **Lumeon – 12345**.

To view the generated letter:

1. In the **Past Letters** table below the **Create New Letter** form, select **Download** in the row of the letter that you want to view.



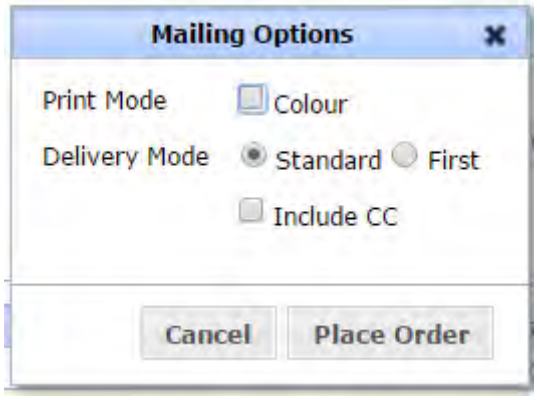
Past Letters

Date	Recipient	Author	Subject	Template	Download							Printed	Sent
12/11/2020 14:00	Mr Conrad Connor	Director	Appointment Create	Appointment Create Letter -	Clinic	Download	Post	edit	Replace	Resend	Cancel	☑	☐
13/11/2020 17:30	Mr Conrad Connor	Director	Appointment Create	Appointment Create Letter -	Clinic	Download	Post	edit	Replace	Resend	Cancel	☑	☐
17/11/2020 12:59	Mr Conrad Connor	Director	Appointment Create	Appointment Create Letter -	Clinic	Download	Post	edit	Replace	Resend	Cancel	☑	☐
08/12/2020 11:56	Mr Conrad Connor	Director	Appointment Create	Appointment Create Letter -	Clinic	Download	Post	edit	Replace	Resend	Cancel	☑	☐
08/01/2021 10:48	Mr Conrad Connor	Director	Appointment Create	Appointment Create Letter -	Clinic	Download	Post	edit	Replace	Resend	Cancel	☑	☐
16/02/2021 17:59	Mr Conrad Connor	Director	Appointment Create	Appointment Create Letter -	Clinic	Download	Post	edit	Replace	Resend	Cancel	☑	☐

2. Select where you want the letter to be downloaded on your computer. If the letter has attachments, the download is a zip file.

3. Select edit if you want to change the letter.

4. If the **Post Letter** functionality has been configured, select **Post** to send a secure electronic copy of the letter to a third party where it will be printed, enveloped and sent via Royal Mail. Letters can be sent in colour or black and white.



Generating a booking confirmation letter from the patient record does not work properly with merge tags. This type of letter is automatically generated at the time when the appointment is booked in the diary (if the **Create confirmation letter** check box has been selected).

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Send confirmation letters and associated documents as email attachments

It is possible to attach appointment confirmation letters and their associated documents as attachments to emails. This provides a solution when confirmation emails need to provide additional information, such as maps that are location or appointment specific.

Contact Lumeon Support to ensure that the core configuration is set up to enable this feature. When booking an appointment, select both the **Send confirmation email** and **Create confirmation letter** check boxes.

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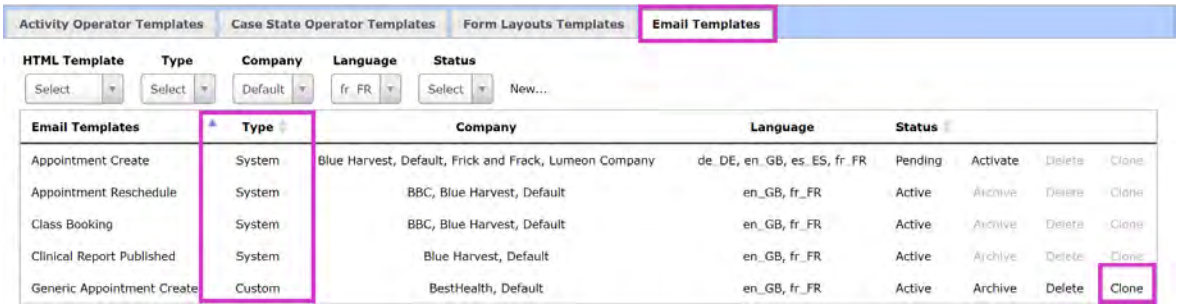
Email templates

You can configure Lumeon to automatically send emails to patients, such as appointment confirmations or password resets.

View email templates

To view email templates:

1. Select **Email Templates** in the **Communication** or **Pathway Logic** menu. Alternatively, select **HTML Template Management** in the **System Configuration** menu, and select the **Email Templates** tab. This displays a list of existing email templates.



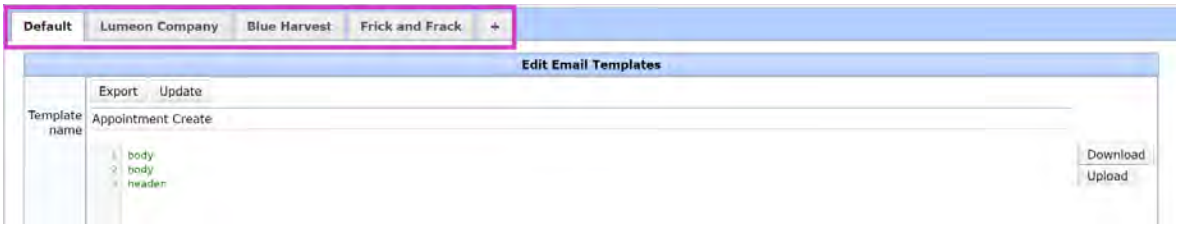
   Each email template displays a **Type** of:

   - **System** – Templates included in every Lumeon implementation.
   - **Custom** – Templates created by users in your organization or by Lumeon Support on behalf of your organization.

2. Click **New** to create a new custom email template.

3. You can activate an inactive email template, archive an active template, or delete a template. You can also clone a custom template.

4. Select an email template to display the **Default** email template which you can then edit, or click **+** to create email template versions for specific companies.



Create a new email template

To create a new email template:

1. Click **New...** to create a new custom email template.



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2. Complete the fields using the table below to create a new email template. You can create email templates with either HTML or plain text content, or with both HTML and plain text content to create multi-part emails.



3. You can enter the CSS and HTML directly into the fields in this window, or use one of the options in *Import, export, download, or upload email template content (page 21)*.

4. If multiple languages are configured for your organization, you can include translations - see *Translations (page 23)*.

5. You can preview the template - see *Preview (page 24)*.

6. When you have finished, click **Create**.

7. Click **Return to HTML Template Management** at the top left hand side of the page.



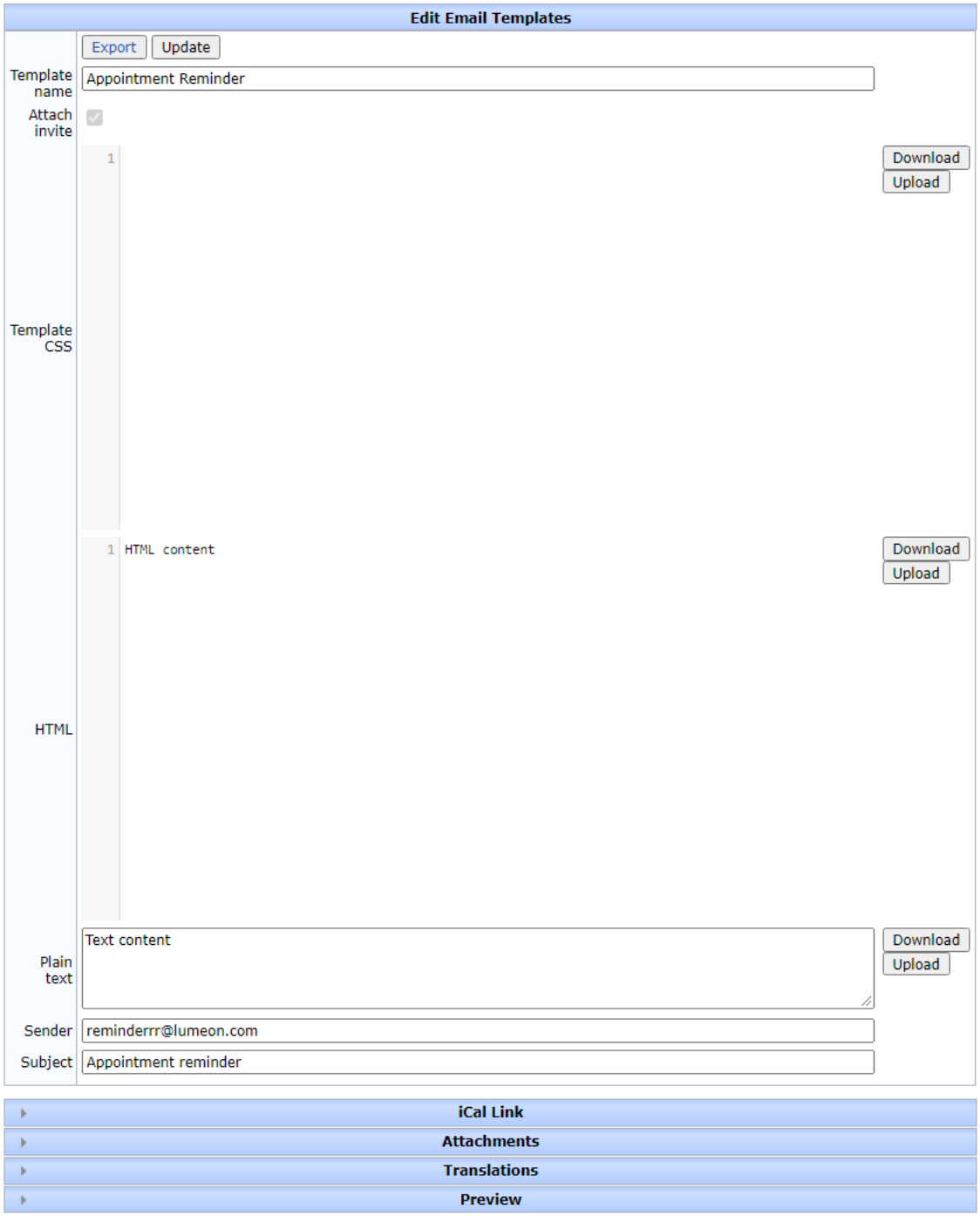
8. Find the new template in the list and click **Activate**. To make it easier to find the template, you can select **Pending** from the drop-down list in the **Status** field to display pending templates only. You cannot use the template until its status is **Active**.

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Edit an email template

To edit an email template:

1. Select an email template to display the **Default** email template which you can then edit, or create alternative versions for different companies.



2. Change the fields using the table below to edit the email template.

3. You can change the CSS and HTML directly in the fields in this window, or use one of the options in *Import, export, download, or upload email template content (page 21)*. The **Import** option is not available when editing an existing email template.

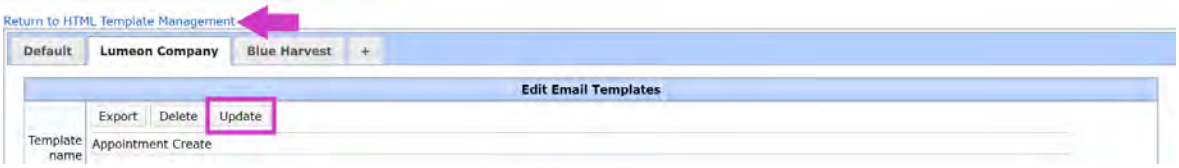
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4. If multiple languages are configured for your organization, you can add new translations or edit existing ones - see *Translations (page 23)*.

5. You can preview the template - see *Preview (page 24)*.

6. When you have finished, click **Update**.

7. Click **Return to HTML Template Management** at the top left hand side of the page.



8. Find the template in the list and click **Activate**. To make it easier to find the template, you can select **Pending** from the drop-down list in the **Status** field to display pending templates only. You cannot use the template until its status is **Active** again.

Email template fields

Complete the email template's details using the following table:

Field	Description
Template Name	Name of the email template.
Template CSS	Enter template CSS in this section.
HTML	Enter template HTML in this section. You can use merge tags to include patient and appointment related information in system templates. You can also use Twig tags to include other information, such as activity data or a response to a question in a form, in custom templates. Lumeon inserts the actual values in the merge tags and Twig tags when it generates the emails. See *Appendices (page 30)* for the merge tags you can use.
Plain Text	Enter template content in plain text in this section. You can use merge tags to include patient and appointment related information in system templates. You can also use Twig tags to include other information, such as activity data or a response to a question in a form, in custom templates. Lumeon inserts the actual values in the merge tags and Twig tags when it generates the emails. See *Appendices (page 30)* for the merge tags you can use.
Sender	Enter the email address that the email originates from, for example, `info@lumeonclinic.com`. The email address must be valid - see *Email sender validation (page 22)*.
Subject	Subject of the email, for example, **Your Booking is Confirmed!**.
iCal Link	You can include digital calendar data, allowing patients to receive and import appointment related calendar entries. This feature only appears for appointment related templates. See *iCalendars (page 23)*.
Attachments	You can attach documents to email templates to be included when distributed. See *Attachments (page 22)*.
Translations	Choose from the supported language options to create emails in foreign language text. HTML, attachments and iCal links can be added for each translation. See *Translations (page 23)*.
Preview	Select this option to view a preview of the email template. See *Preview (page 24)*.

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Import, export, download, or upload email template content

Use the following options to help you create or edit your email template. Template content is in JSON format.

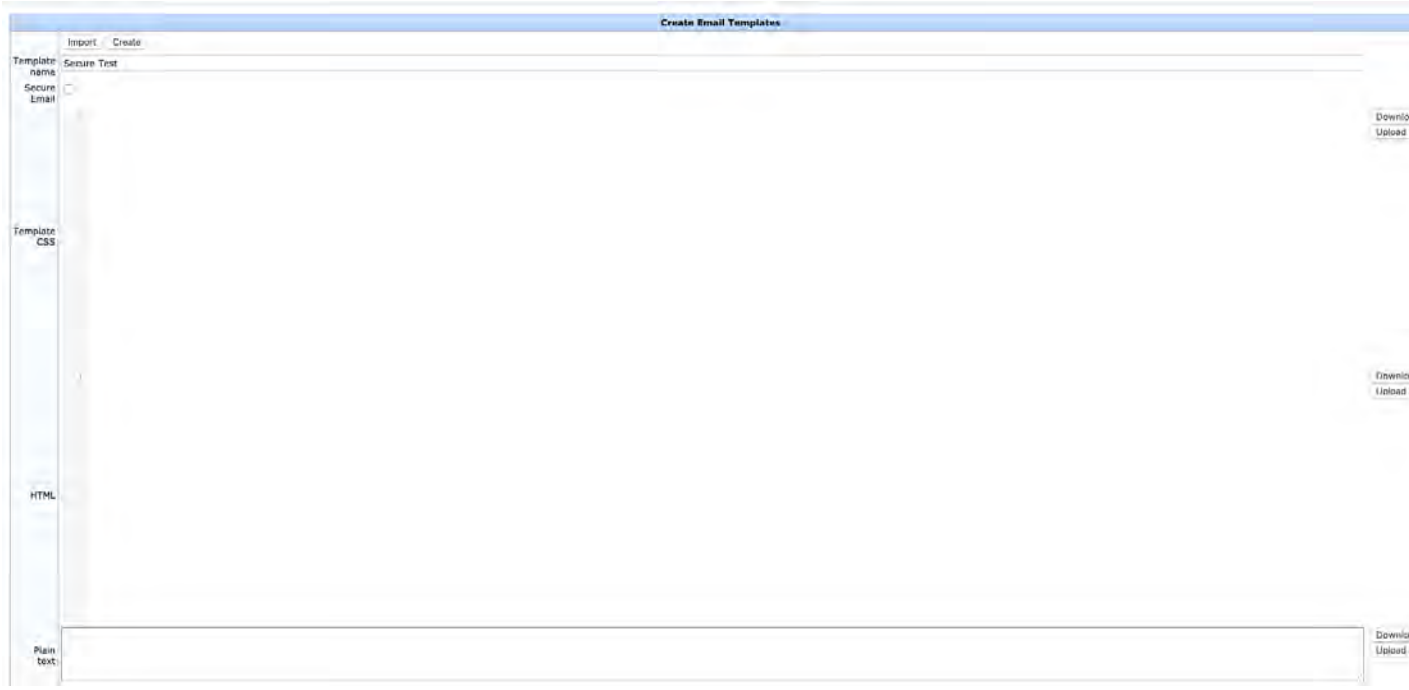
- **Download** - Download the CSS or HTML elements separately so that you can edit them outside Lumeon. You may find it useful to download the CSS or HTML prior to making changes so that you have a record of it and can restore it to the original version, if necessary.
- **Upload** - Upload the CSS or the HTML separately into the template after you have created or edited them outside Lumeon.
- **Copy and paste** - If you have created or edited the CSS or HTML elements, or translations, outside Lumeon, you can use standard copy and paste commands to copy them into the template.
- **Export** - You can export a file containing the existing CSS, HTML, and translations, so that you can import it into another new template. This is also useful for copying templates between different deployments of Lumeon.
- **Import** - In a new template, you can import the CSS, HTML and translations from a template that you have exported from Lumeon. This is also useful for copying templates between different deployments of Lumeon.

Secure email communication

Lumeon can send individuals secure messages via the dedicated email functionality.

Secure email communication enables your organization to deliver emails to patients that first require them to successfully authenticate before accessing an email.

To indicate that the email should be distributed in a secure fashion, select **Secure Email**.



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With this setting enabled, patients receive an email, prompting them to follow a link to view or update information. Patients must successfully authenticate before viewing the secure content.

Enabling the feature allows you to configure the desired secure email settings, such as:

- Manner of authentication - whether the code is distributed via email, SMS, or IVR.
- Number of digits applied to an authentication code - 4, 6 or more digits.
- Number of allowed consecutive failed authentication attempts.
- Validity period (in days).
- Validity period of code sent (in minutes).

Email sender validation

If you enter an incorrect email address in the **Sender** field, you cannot save the template and an error message displays in red next to the **Sender** field. The message advises of the issue that you must resolve.

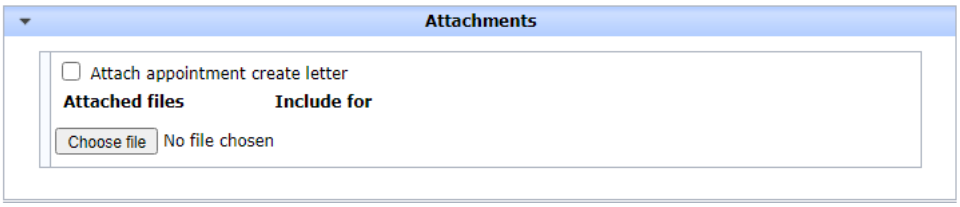


If language translations are present in the email template, you must also check that the sender's email address is correctly entered for all the language variants.

Attachments

For appointment-related email templates only, you can attach files to email templates.

Click on the **Attachments** bar to expand or shrink the form.



Select **Attach appointment create letter** if you want to attach an appointment create letter. Alternatively, click **Choose file** to select and attach a different file.

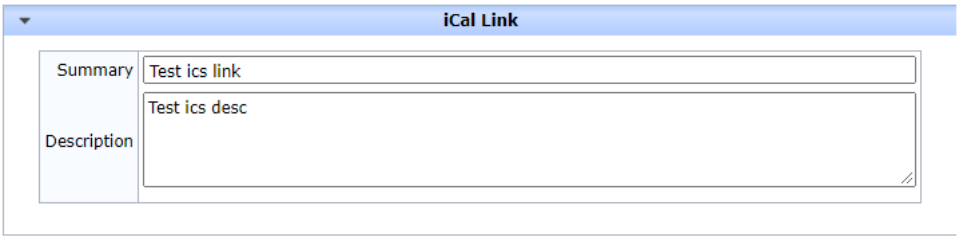
You can attach files to a template, for example, a location map. Lumeon includes these files as attachments whenever the email template is used. The attachments must be in PDF, RTF, or Word format. JPG and PNG files should be converted to PDF before attaching.

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iCalendars

For appointment related email templates only, the **iCal Link** option is displayed.

Click on the **iCal Link** bar to expand or shrink the form.



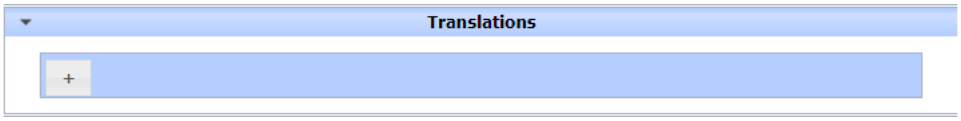
Enter the summary and description for the appointment.

When patients receive the appointment email, they can opt to include the digital calendar information in their mobile calendar.

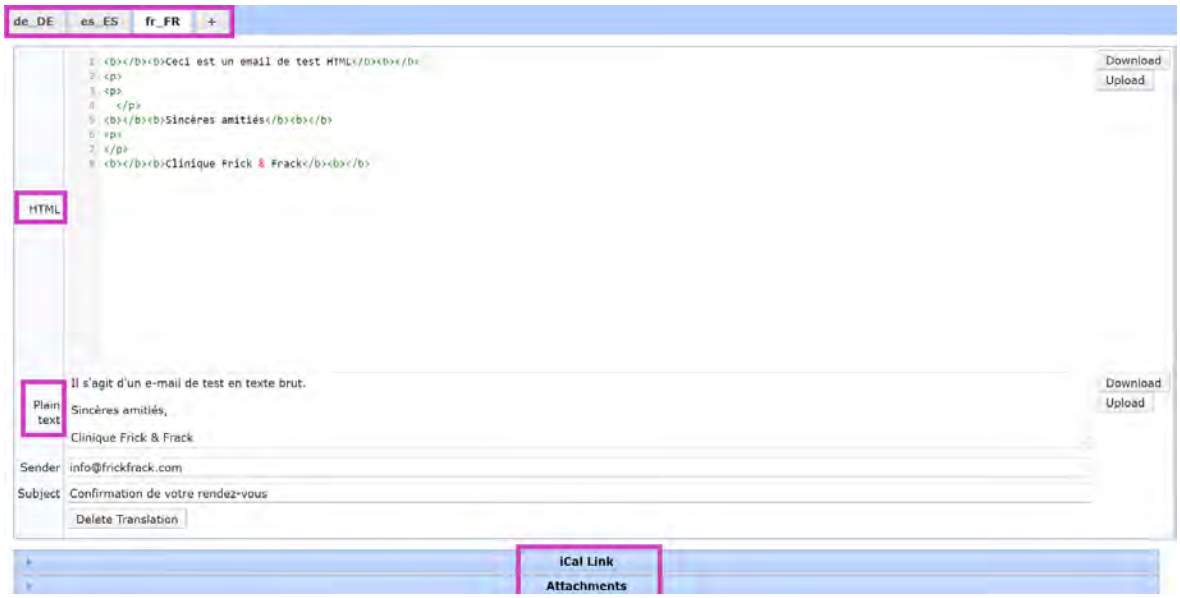
Translations

If multi-language configuration is enabled, you can create language translations for each template and any template variations. To do so:

1. Click on the **Translations** bar to expand or shrink the section.



2. Click the **+** tab and select from the available language options to create new language variants for the template.



You can add language-specific HTML and language-specific plain text content for the selected language option.

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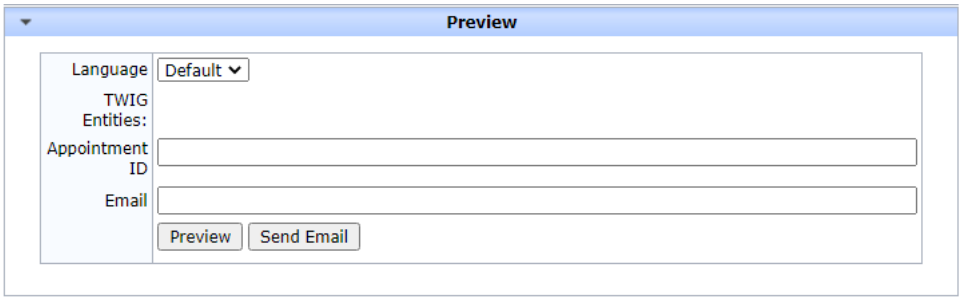
Lumeon offers the ability to supply iCalendar information for each language variant for appointment related templates only. It also offers the ability to include attachments for each language variant.

You can remove a translation by clicking **Delete Translation**.

Preview

You can preview the email template. To do so:

1. Click on the **Preview** bar to expand or shrink the section.



2. Leave the **Language** field as **Default** or select the language that you want to preview from the drop-down list.

3. Depending on the template type, you can enter Twig entities in the appropriate fields to provide a more accurate visual representation of the generated email.

4. Select one of the following options:
   - **Preview** - To generate an on-screen preview of the template.



   - **Send Email** - Supply an email address to generate an email replicating the end user communication.

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Future appointment templates

To download a document detailing a patient's future appointments, select **P** next to **Future Appointments** on the patient's **Overview** page.



Future Appointments						P
Date	**Time**	**Description**	**Practitioner**	**Location**	**Status**	
21/12/2015 (Mon)	09:00	GP 15min appointment	Dr Joe Bloggs	Diagnostic Clinic	Pending	Cancel

To create the template for the future appointments document, select **Template Files** in the **System Configuration** menu.

Download and update the `PatientFutureAppointments.rtf` as required and then re-upload it, ensuring that you do not change the name.

See *Patient future appointment merge tags (page 38)* to view the merge tags that you can use with the future appointments template.

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Financial statements

Financial statements must be created as RTF files and saved in **Template Files** in the **System Configuration** menu using the tags found in the appendices.

You must save the template files with the following file names for Lumeon to identify them correctly:

Type	Template file
Invoices	individual_invoice.rtf insurance_company__invoice.rtf company_invoice.rtf
Payments (Receipts)	individual_payment.rtf insurance_company_payment.rtf company_payment.rtf
Refunds	individual_refund.rtf insurance_company_refund.rtf company_refund.rtf
Statements	PatientStatement.rtf CompanyStatement.rtf InsuranceCompanyStatement.rtf
Credit Notes	individual_credit_note.rtf Insurance company credit notes use the 'Insurance Company' invoice

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Labels

There are two types of label available and each label has its own set of tags that can be used:

- Patient labels
- Appointment labels

Patient labels

You can download patient labels by selecting **Print Labels** on the **Tasks** menu in a patient's account.



The following information can be displayed on patient labels:

- Patient's full name
- Patient's DOB
- Patient's ID
- Patient's employee reference
- Patient's gender
- Patient's address
- Patient's day telephone number
- Patient's evening telephone number
- Patient's mobile telephone number

See *Patient label merge tags (page 43)* for the merge tags that you can use in patient labels.

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Appointment labels

You can download appointment labels from the **Appointment** menu on the **Patient Details** page.



The following information can be displayed on appointment labels:

- Patient's title
- Patient's forename
- Patient's surname
- Patient's DOB
- Patient's ID
- Patient's sex
- Patient's address
- Patient's day telephone number
- Patient's evening telephone number
- Patient's mobile telephone number
- Appointment date
- Practitioner's full name

See *Appointment label merge tags (page 44)* for the merge tags that you can use in appointment labels.

Label templates

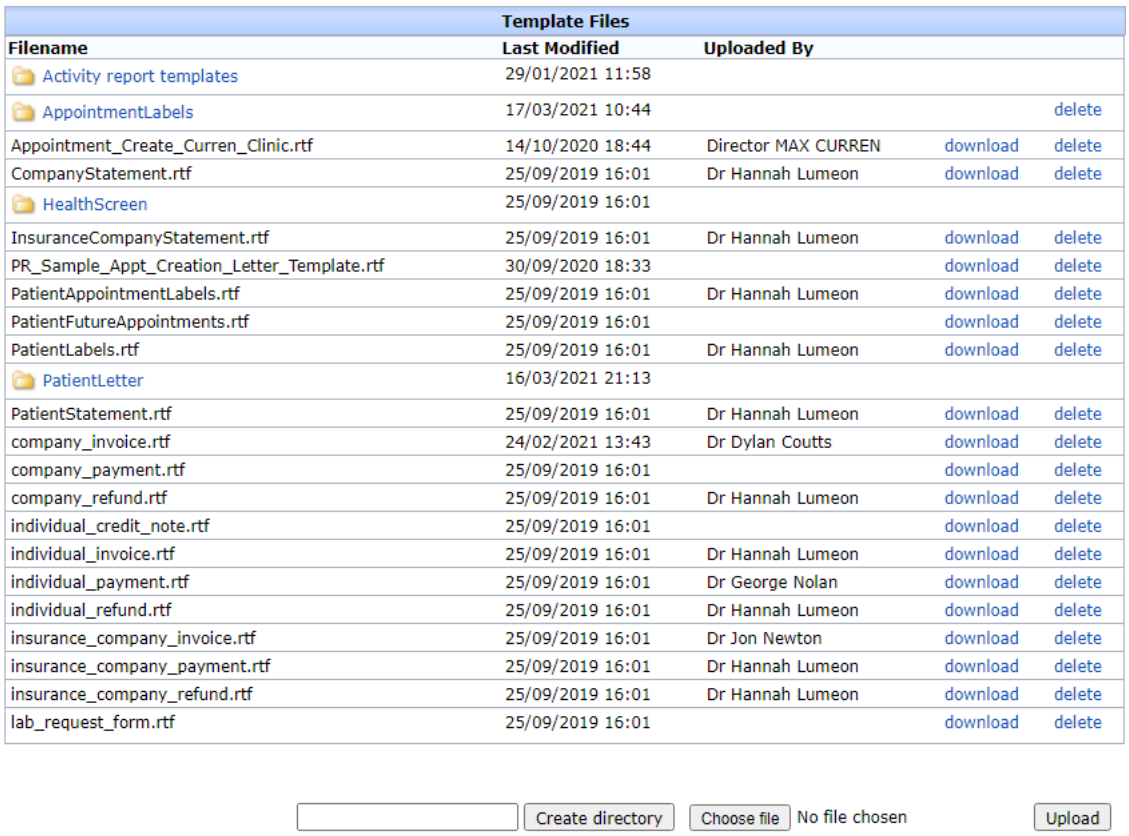
Label templates must be saved as RTF files. Ensure that the template reflects the measurements of the labels that will be used. Each label has its own set of tags that can be used. The labels must be saved as:

- `PatientLabels.rtf` - see *Patient label merge tags (page 43)*.
- `PatientAppointmentLabels.rtf` - see *Appointment label merge tags (page 44)*.

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To upload a label template file:

1. Select **Template Files** in the **System Configuration** menu.



Template Files				
Filename	**Last Modified**	**Uploaded By**		
Activity report templates	29/01/2021 11:58			
AppointmentLabels	17/03/2021 10:44			delete
Appointment_Create_Curren_Clinic.rtf	14/10/2020 18:44	Director MAX CURREN	download	delete
CompanyStatement.rtf	25/09/2019 16:01	Dr Hannah Lumeon	download	delete
HealthScreen	25/09/2019 16:01			
InsuranceCompanyStatement.rtf	25/09/2019 16:01	Dr Hannah Lumeon	download	delete
PR_Sample_Appt_Creation_Letter_Template.rtf	30/09/2020 18:33		download	delete
PatientAppointmentLabels.rtf	25/09/2019 16:01	Dr Hannah Lumeon	download	delete
PatientFutureAppointments.rtf	25/09/2019 16:01		download	delete
PatientLabels.rtf	25/09/2019 16:01	Dr Hannah Lumeon	download	delete
PatientLetter	16/03/2021 21:13			
PatientStatement.rtf	25/09/2019 16:01	Dr Hannah Lumeon	download	delete
company_invoice.rtf	24/02/2021 13:43	Dr Dylan Coutts	download	delete
company_payment.rtf	25/09/2019 16:01		download	delete
company_refund.rtf	25/09/2019 16:01	Dr Hannah Lumeon	download	delete
individual_credit_note.rtf	25/09/2019 16:01		download	delete
individual_invoice.rtf	25/09/2019 16:01	Dr Hannah Lumeon	download	delete
individual_payment.rtf	25/09/2019 16:01	Dr George Nolan	download	delete
individual_refund.rtf	25/09/2019 16:01	Dr Hannah Lumeon	download	delete
insurance_company_invoice.rtf	25/09/2019 16:01	Dr Jon Newton	download	delete
insurance_company_payment.rtf	25/09/2019 16:01	Dr Hannah Lumeon	download	delete
insurance_company_refund.rtf	25/09/2019 16:01	Dr Hannah Lumeon	download	delete
lab_request_form.rtf	25/09/2019 16:01		download	delete

2. Click **Choose file** and search for the label template file, then click **Upload**. You must upload the file to the top level of the **Template Files** page.

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Appendices

Patient letter merge tags

You can use these merge tags in patient letters. Fields that reference appointments are only valid for appointment creation letters.

To use merge tags, enter the following words between **<<** and **>>** symbols, for example, **<<body_text>>**.

content_start	ibs_index	appointment_centre_address_line5
body_text	ibs_booking_id	appointment_centre_address_town
centre_name	sender_title	appointment_centre_address_county
centre_address	sender_forename	appointment_centre_address_postcode
centre_address_long	sender_surname	appointment_centre_notes
centre_telephone	sender_job_title	appointment_centre_additional_detail
patient_id	optician_title	appointment_booker_title
patient_title	lay_report_contact_address_long	appointment_booker_forename
patient_forename	lay_report_contact_address_1	appointment_booker_surname
patient_surname	lay_report_contact_address_2	appointment_booker_name
patient_postcode	lay_report_contact_address_3	appointment_booker_email
patient_address	lay_report_contact_address_4	appointment_booker_date
patient_address_long	lay_report_contact_address_5	appointment_booker_time
patient_address_long_no_pc	lay_report_contact_town	appointment_booker_job_title
patient_dob	lay_report_contact_county	referrer_title
patient_balance	lay_report_contact_postcode	referrer_forename
patient_telephone_day	company_office_name	referrer_surname
patient_telephone_evening	company_office_address	referrer_telephone_evening
patient_telephone_mobile	company_office_address_long	referrer_address
patient_email	appointment_practitioner_title	referrer_address_long
patient_sex	appointment_practitioner_forename	payment_method
patient_nhs_number	appointment_practitioner_surname	patient_instructions
patient_telephone_best	appointment_type_category_name	start_charge_to_logo
patient_preferred_location_address_long	appointment_type_name	end_charge_to_logo
patient_preferred_location_fax_number	appointment_day	start_appointment_centre_map
patient_preferred_location_name	appointment_date	end_appointment_centre_map
patient_preferred_location_telephone_number	appointment_start	start_appointment_centre_logo
gp_title	appointment_end	end_appointment_centre_logo
gp_forename	appointment_time_to_come_in	start_charge_to_logo
gp_surname	appointment_type_comments	end_charge_to_logo
gp_address	appointment_email_comments	begin_copy_to
	appointment_start_12h	copy_to_title

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gp_address_long	appointment_price	copy_to_forename
rand_no	appointment_centre_name	copy_to_surname
screen_no	appointment_centre_telephone	copy_to_address
insurance_company_balance	appointment_centre_address	copy_to_address_long
created	appointment_centre_address_long	end_copy_to
created_long	appointment_centre_address_line1	sign_off
insurance_company	appointment_centre_address_line2	content_end
policy_number	appointment_centre_address_line3	
employee_reference	appointment_centre_address_line4	
fail_reason		

Debt chasing letter merge tags

You can use all the usual merge tags in the RTF debt chasing template document.
In addition, the letter body text (which replaces the **<<body_text>>** symbol in the RTF template document) and the subject text (which replaces the **<<subject>>** symbol in the RTF template document) can contain the following symbols:

- InsurerName
- InvoiceOutstandingDays
- InvoiceOutstandingCount
- InvoiceOutstandingTotal

Email merge tags

To use merge tags, enter the following words between **<<** and **>>** symbols, for example, **<<body_text>>**.

Email template	Merge tags
Access – Patient	title
	forename
	surname
	email
	password
Access – Password	title
	forename
	surname
	email
	password

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Email template	Merge tags
Access – Employee	title
	forename
	surname
	email
	password
Access – Company	company_name
	title
	forename
	surname
	email
	password
Reset Password - Patient	title
	forename
	surname
	email
	link
Reset Password - Employee	title
	forename
	surname
	email
	link
Reset Password - Company	company_name
	title
	forename
	surname
	email
	link

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Email template	Merge tags
Appointment Create/Modify/ Cancel	begin_multiple_sections
	end_multiple_sections
	end_multiple_sections
	begin_section
	end_section
	section_start
	section_end
	section_duration
	section_doctor_title
	section_doctor_forename
	section_doctor_surname
	section_name
	patient_title
	patient_forename
	patient_surname
	primary_doctor_title
	primary_doctor_forename
	primary_doctor_surname
	appointment_type_name
	date
	start
	end
	appointment_time_to_come_in
	location_name
	appointment_type_comments
	centre_address
	booker_title
	booker_forename
	booker_surname
	booker_name
	booker_email
	booked_date
	booked_time
	begin_form
	form_link
	end_form
Appointment Feedback Form	feedback_form_link

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Email template	Merge tags
Invoice	invoicee_title
	invoicee_forename
	invoicee_surname
	invoice_number
	total_price
	outstanding_amount
	location_name
	invoice_text
Patient Report Notification (EMR2 only)	title
	forename
	surname
	email
	patient_title
	patient_forename
	patient_surname
	appointment_type_name
	report_type_name
	classification
Patient Exercise	patient_title
	patient_forename
	patient_surname
	patient_address
	physio_title
	physio_forename
	physio_surname
	physio_address
	programme_name
Insurance Reminder	invoicee_title
	invoicee_forename
	invoicee_surname
	invoice_number
	total_price
	outstanding_amount
	location_name
	invoice_text
Task Reminder	task_subject
	task_priority
	task_duedatetime
	task_type
	forename
	task_detail - This tag should not be used if there is any chance that patient health information will be entered into task details.

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Email template	Merge tags
Account Locked – Patient	title
	forename
	surname
	email
Account Locked – Employee	title
	forename
	surname
	email
Account Locked – Company	title
	forename
	surname
	email
	company_name
Referrer Clinical Report Notification	contact-forename
	contact-surname
	patient-forename
	patient-surname
Debt Chasing	RecipientTitle
	RecipientForename
	RecipientSurname
	RecipientSalutation
	InsurerName
	InvoiceOutstandingDays
	InvoiceOutstandingCount
	InvoiceOutstandingTotal

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Email template	Merge tags
Custom 'action' emails - If the email has been linked to an appointment, these and 'Appointment Create/Modify/ Cancel' tags can be used. If no appointment is linked, only these tags can be used.	patient_id
	patient_title
	patient_forename
	patient_surname
	patient_next_of_kin
	nhs_number
	employee_reference
	job_title
	comments_critical
	business_school_depot
	patient_dob
	recipient_title
	recipient_forename
	recipient_surname
	event_date_long
	event_comments
	follow_up_action
	follow_up_due
	referral_speciality_name

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Class email and letter merge tags

You can use these merge tags when sending email and letter confirmations for classes.

To use merge tags, enter the following words between << and >> symbols, for example, `<<patient_title>>`.

Class booking template	Class cancellation template
patient_title	cancelled_by_title
patient_forename	cancelled_by_forename
patient_surname	cancelled_by_surname
doctor_title	cancelled_by_name
doctor_forename	cancelled_by_email
doctor_surname	cancelled_date
class_type_name	cancelled_time
date	
start	
end	
location_name	
centre_address	
centre_telephone	
room_name	
practitioner_email	
practitioner_tel_number	
booker_title	
booker_forename	
booker_surname	
booker_name	
booker_email	
booked_date	
booked_time	

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Patient future appointment merge tags

You can use these merge tags in the future appointments template, `PatientFutureAppointments.rtf`, which is stored in the top level of the **Template Files** page.

To use merge tags, enter the following words between **<<** and **>>** symbols, for example, `<<patient_id>>`.

- patient_id
- patient_name
- patient_dob
- begin_appointment
- date
- time
- time_to_come_in
- description
- practitioner
- location
- status
- end_appointment

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Patient invoice merge tags

You can use these merge tags in the patient invoice template `individual_invoice.rtf`.

To use merge tags, enter the following words between << and >> symbols, for example, `<<content_start>>`.

content_start	invoice_text	short_code
original_invoice_start	invoice_contract_text	quantity
original_invoice_end	location_telephone	batch
referring_practitioner	begin_payment	item_price_net
patient_id	payment_number	line_price_net
ibs_index	paid	line_price_vat
title	payer_name	line_price
forename	payment_method_name	vat_rate_code
surname	payment_reference	vat_rate_percentage
address	payment_amount	item_location_name
gp_code	begin_payment_card_details	doctor_title
practice_code	payment_card_scheme	doctor_forename
invoice_number	payment_card_pan	doctor_surname
external_invoice_number	payment_card_number	item_date
issuing_company_name	payment_card_expires	begin_procedure
total_price_net	end_payment_card_details	code
total_vat	begin_vat_details	description
total_price	end_vat_details	reporter_title
created	end_payment	reporter_forename
due	begin_reissue	reporter_surname
location_name	reissue_reason	reporter_name
outstanding_amount	end_reissue	end_procedure
paid_in_full	begin_invoice_item	end_invoice_item
diagnosis_code	item_name	content_end

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Insurer invoice merge tags

You can use these merge tags in the Insurer Invoice template `insurance_company_invoice.rtf`.

To use merge tags, enter the following words between **<<** and **>>** symbols, for example, `<<content_start>>`.

content_start	insurance_company_name	item_description
original_invoice_start	diagnosis_code	quantity
original_invoice_end	invoice_text	short_code
referring_practitioner	referrer_id	item_date
insurance_company_name	referrer_title	authorisation_code
title	referrer_forename	appointment_requested_date
forename	referrer_surname	doctor_title
surname	referrer_surgery	doctor_forename
address	referrer_address	doctor_surname
sage_reference	referrer_address_long	doctor_qualifications
healthcode_id	company_reference_questions	item_price_net
purchase_order_number	invoice_contract_text	item_price_net_wc
end_procedure	location_telephone	line_price_net
patient_title	cheque_payable_to	line_price_vat
patient_forename	begin_payment	line_price
patient_surname	payment_number	line_price_wc
patient_dob	paid	vat_rate_code
patient_address	payer_name	vat_rate_percentage
patient_address_long	payment_method_name	vat_rate_percentage_wp
policy_number	payment_reference	batch
company_contact_name	payment_amount	treatment_cycle_name
invoice_number	begin_payment_card_details	begin_procedure
external_invoice_number	payment_card_scheme	code
total_price_net	payment_card_pan	description
total_vat	payment_card_number	reporter_title
total_price	payment_card_expires	reporter_forename
created	end_payment_card_details	reporter_surname
due	end_payment	reporter_name
location_name	begin_vat_details	end_procedure
outstanding_amount	end_vat_details	end_invoice_item
paid_in_full	begin_invoice_item	content_end

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Company invoice merge tags

You can use these merge tags in the Insurer Invoice template `company_invoice.rtf`.

To use merge tags, enter the following words between << and >> symbols, for example, `<<content_start>>`.

content_start	begin_detail	due
original_invoice_start	company_name	location_name
original_invoice_end	item_name	outstanding_amount
referring_practitioner	quantity	paid_in_full
begin_patients_content	line_price	invoicee_reference
begin_patient	begin_patient	invoice_text
appointment_purchase_order_number	charge_date	location_telephone
appointment_requested_date	patient_id	invoice_contract_text
patient	patient_name	begin_payment
patient_title	patient_dob	payment_number
patient_forename	practitioner_name	paid
patient_surname	cost_centre	payer_name
patient_dob	employee_reference	payment_method_name
patient_address_long	quantity	payment_reference
patient_telephone_day	line_price	payment_amount
patient_telephone_mobile	company_contact_name	begin_payment_card_details
patient_telephone_evening	begin_procedure	payment_card_scheme
patient_cost_code	code	payment_card_pan
patient_cost_centre	description	payment_card_number payment_card_expires
employee_reference	reporter_title	end_payment_card_details
company_contact_name	reporter_forename	end_payment
patient_company_office	reporter_surname	begin_vat_details
doctor_title	reporter_name	end_vat_details
doctor_forename	end_procedure	begin_invoice_item
doctor_surname	end_patient	charge_to_id
doctor_qualifications	end_detail	item_name
appointment_type	end_details_content	short_code
appointment_date	company_name	item_date
begin_procedure	company_purchase_order_number	quantity
code	title	item_price_net
description	forename	line_price_net
reporter_title	surname	line_price_vat
reporter_forename	address	line_price
reporter_surname	sage_reference	batch
reporter_name	invoice_number	vat_rate_code
	external_invoice_number	

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end_procedure	total_price_net	vat_rate_percentage
company_reference_questions	total_vat	purchase_order_no
end_patient	total_price	end_invoice_item
end_patients_content	created	content_end
begin_details_content		

Payment receipt merge tags

You can use these merge tags in payment receipt templates for:

- Individual patients - template `individual_payment.rtf`
- Insurance companies - template `insurance_company_payment.rtf`
- Companies - template `company_payment.rtf`

To use merge tags, enter the following words between **<<** and **>>** symbols, for example, `<<title>>`.

Patient	Insurance company	Company
title	insurance_company_name	company_name
forename	title	title
surname	forename	forename
address	surname	surname
payment_number	address	address
payment_method	payment_number	payment_number
payment_amount	payment_method	payment_method
payment_date	payment_amount	payment_amount
payment_location	payment_date	payment_date
payment_status	payment_location	payment_location
location_telephone	payment_status	payment_status
begin_payment_card_details	begin_payment_card_details	begin_payment_card_details
payment_card_scheme	payment_card_scheme	payment_card_scheme
payment_card_pan	payment_card_pan	payment_card_pan
payment_card_number	payment_card_number	payment_card_number
payment_card_expires	payment_card_expires	payment_card_expires
end_payment_card_details	end_payment_card_details	end_payment_card_details

Refund merge tags

You can use these merge tags in refund receipt templates for:

- Individual patients - template `individual_refund.rtf`
- Insurance companies - template `insurance_company_refund.rtf`
- Companies - template `company_refund.rtf`.

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To use merge tags, enter the following words between << and >> symbols, for example, `<<title>>`.

Patient	Insurance company	Company
title	insurance_company_name	company_name
forename	title	title
surname	forename	forename
address	surname	surname
payment_number	address	address
payment_method	payment_number	payment_number
payment_amount	payment_method	payment_method
payment_date	payment_amount	payment_amount
payment_location	payment_date	payment_date
payment_status	payment_location	payment_location
location_telephone	payment_status	payment_status
begin_payment_card_details	begin_payment_card_details	begin_payment_card_details
payment_card_scheme	payment_card_scheme	payment_card_scheme
payment_card_pan	payment_card_pan	payment_card_pan
payment_card_number	payment_card_number	payment_card_number
payment_card_expires	payment_card_expires	payment_card_expires
end_payment_card_details	end_payment_card_details	end_payment_card_details

Patient label merge tags

You can use these merge tags in the patient label template `PatientLabels.rtf`.

To use merge tags, enter the following words between << and >> symbols, for example, `<<body_text>>`.

- patient_name
- patient_dob
- patient_id
- patient_employee_reference
- patient_gender
- address
- telephone_day
- telephone_evening
- telephone_mobile

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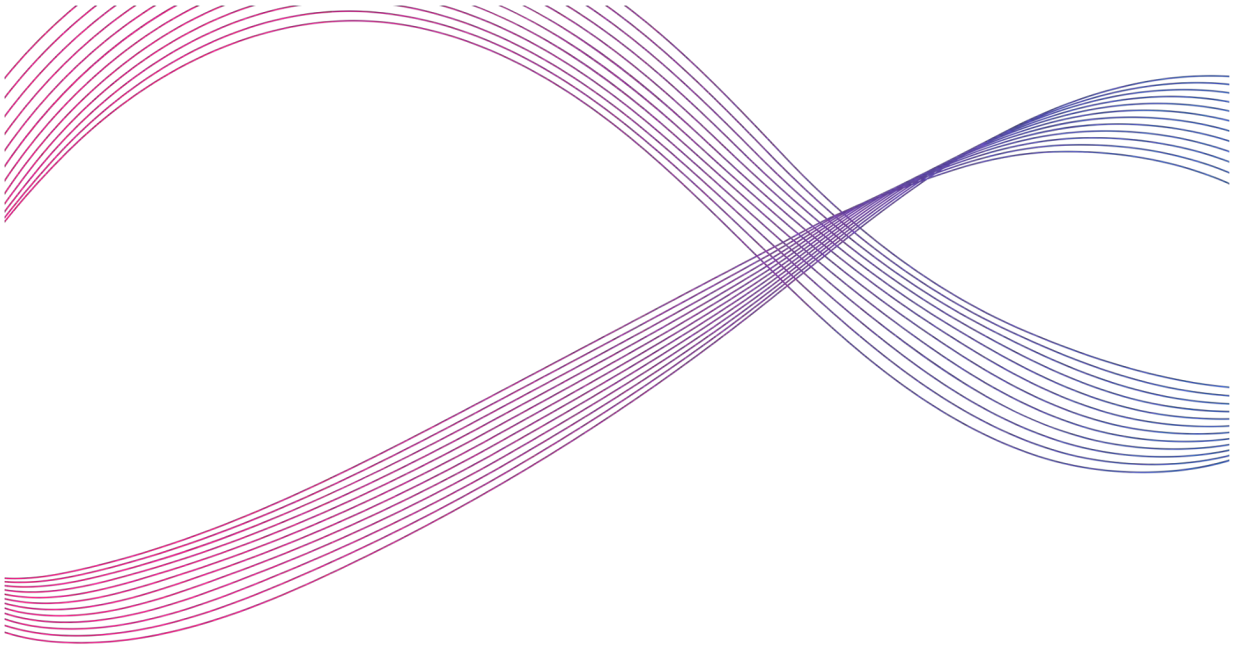
Appointment label merge tags

You can use these merge tags in the appointment label template `PatientAppointmentLabels.rtf`.

To use merge tags, enter the following words between **<<** and **>>** symbols, for example, `<<body_text>>`.

- patient_title
- patient_name
- patient_surname
- patient_dob
- patient_id
- patient_sex
- address
- telephone_day
- telephone_evening
- telephone_mobile
- appointment_date
- appointment_time
- appointment_type
- doctors_name
- doctors_address
- practitioner_gmc
- location_name
- location_address
- lab_order_request_date
- order_comms_number
- obs_service_code

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Lumeon Conductor for Administrators 24.2

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Introduction

Lumeon Conductor is a single web-based solution for patient management and administration. It combines the key components of resourcing, scheduling, billing, care planning, and Electronic Medical Records (EMR) on a single platform.

Purpose

This guide helps administrators understand how to make the most of Conductor, improving the efficiency of day-to-day diary, practice, and patient management. It aims to guide users through the process of booking an appointment for a patient and then tracking that appointment from patient arrival to patient departure, including the billing process and recording of patient health records.

Some features may vary depending on your configuration and product version.

Supported browsers

You can access Lumeon Conductor on many different web browsers and devices.

Conductor supports the current version, and the last three versions, of the following browsers:

- Google Chrome 81+
- Safari 11+
- Edge 81+
- Firefox 76+
- Internet Explorer 11

If you attempt to access Conductor on an unsupported browser, an **Unsupported Browser** page is displayed. This page enables users to download the latest version of their preferred browser.

Other documentation

For system configuration and setup, see ***Lumeon Conductor for System Administrators***.

For information on the practitioner user interface, see ***Lumeon Conductor for Practitioners***.

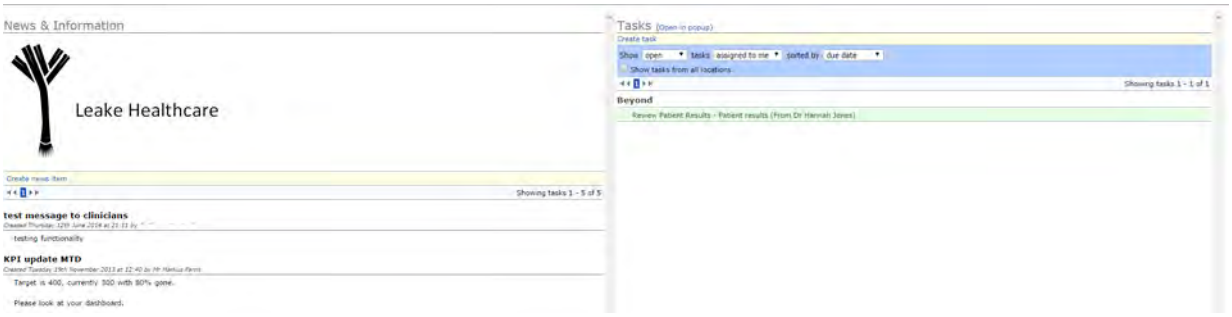
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Home and my details

Home

The administrator login enables you to see the Conductor functionality that you need, as an administrator. When you log in, the **Home** page is displayed.

The **Home** page displays news, information and a summary of tasks.



To create a news item, click **Create news item** on the **Home** page. Choose which locations and users can view the news item. Fill in the subject and details, and then click **Create**.

The task manager on the right enables you to create tasks that can be assigned to yourself or to other users. The dropdown menus filter which tasks are shown on screen. You can also access the task manager from other pages.

My details

The **My Details** page enables you to edit your personal details and set your location.

In **Edit Personal Details**, you can reassign both user-generated tasks and system-generated tasks to another user, if you are unavailable to do the tasks yourself.

To subscribe to receive tasks allocated to particular work teams, select the relevant check boxes in **Task Queue Subscription**. Task queue types can be created through system configuration.

If the **Communication Schemes** setting is enabled, you can indicate your preferred methods of communication in the **Pathway Communication Preference** fields. Use the arrows to set the order of preference between email, letter, SMS, or phone.

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Task manager

The task manager enables you to create new tasks, assign them to yourself or others, view your tasks, or view all tasks.

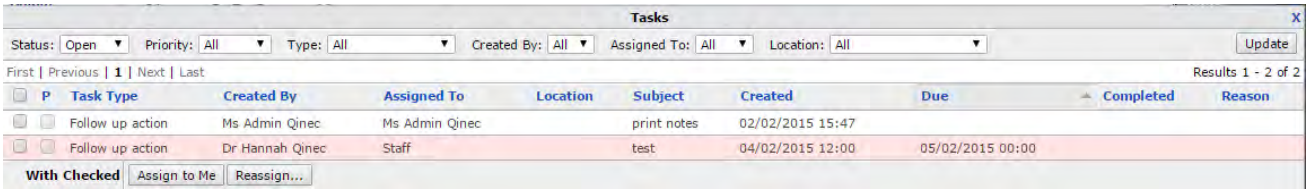
View the task manager

You can access the task manager from most pages by clicking **Tasks...** in the top right hand corner.

Use the drop-down boxes to filter which tasks are viewed and click **Update**. To reassign tasks, check those particular tasks and click **Assign to Me** or **Reassign...**. Clicking **Me** in the top right hand corner displays only tasks assigned to you.

Overdue tasks are highlighted red.

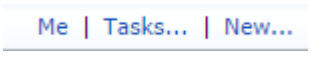
Under the **P** column, high priority tasks display a red square and low priority tasks display a blue square.



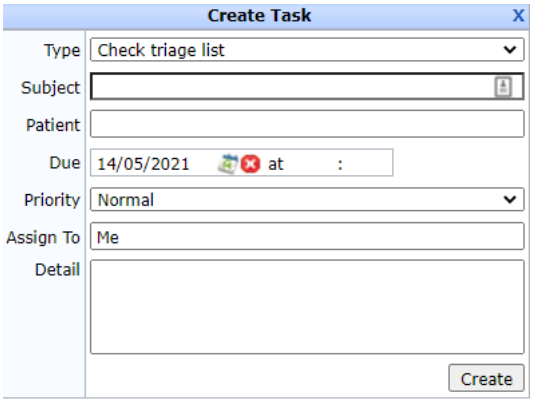
Create a new task

To create a new task:

1. Click **New...** in the top right hand corner to create new tasks and assign them to yourself or other users.



2. Complete the details of the task, using the table below, and click **Create**.



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Create task fields

Use the following fields to complete the **Create Task** page:

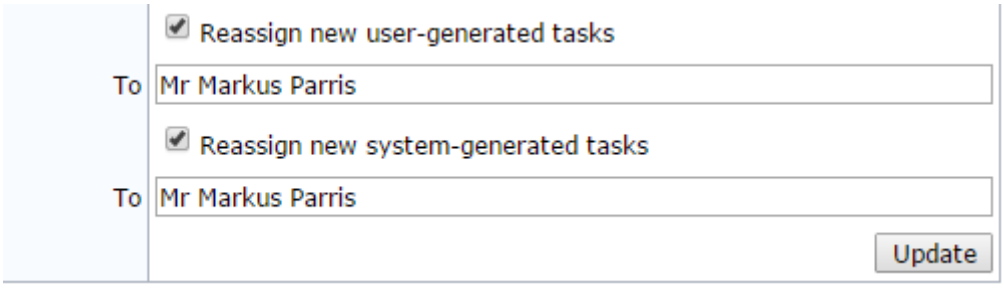
Field name	Description
Task Type	Select the type of task from the drop-down menu. You can configure task types in **Task Types** in the **System Configuration** menu.
Assign To	Choose to assign to one of the following: · **Me** – assigns the task to the logged in user. · **Another user** – start typing the user's surname and select from the displayed search results · **Task Queue** – start typing the task queue and select from the displayed search results. This will display the task to all users who are subscribed to that particular task queue and they can self-allocate themselves to complete that task. Set up task queues in **Task Types** in the **System Configuration** menu.
Subject	Type a subject for the task.
Patient	Associate the task to a patient, if required. Start typing the patient's surname and select from the displayed search results.
Due	Enter an optional due date and time.
Priority	Select low, normal or high priority.
Detail	Add more detail about the task being created.

Reassign tasks

You can reassign any user- or system-generated tasks to someone else if a practitioner is unavailable, for example, if they are on annual leave.

To reassign tasks:

1. Select **My Details** in the **Home** menu.
2. Select the option(s) to **Reassign new user-generated tasks** and/or **Reassign new system-generated tasks** and typing in the name of a colleague or work team. Click **Update**.



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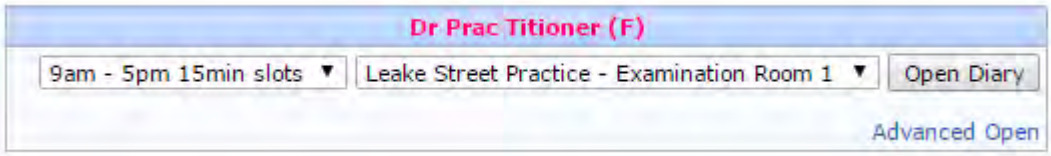
Diary management

Open a diary

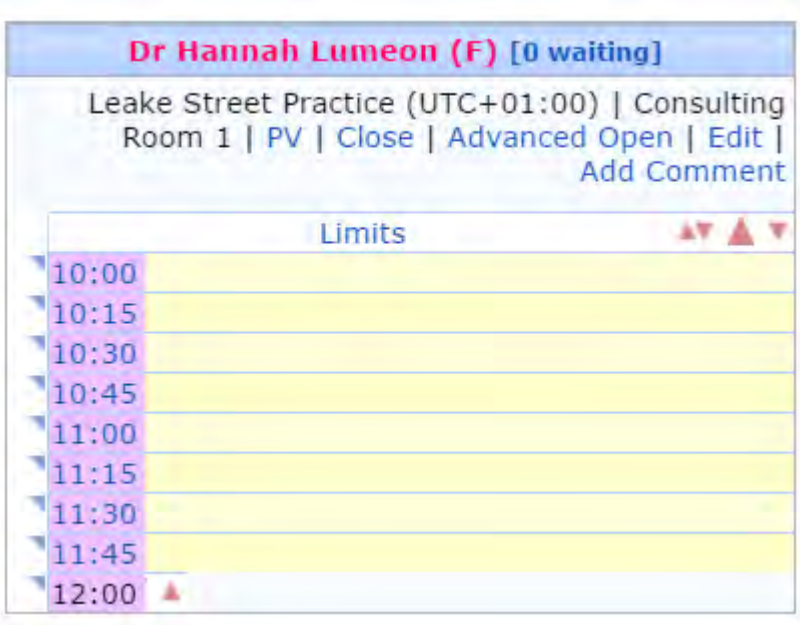
You can book or reschedule appointments using diaries. Appointment slots only appear in search engine results or on the diary page for diaries that have been opened.

To open a diary, click **Diaries** in the top menu. Diaries can be either practitioner or room based. If you are viewing practitioner diaries and want to view room diaries, select **Switch to room view** under the monthly calendar. If you are viewing room diaries and want to view practitioner diaries, select **Switch to practitioner view** under the monthly calendar.

If viewing in practitioner view, select the day that you want to open the diary on, select the location and required specialties from the drop-down lists and select the **Show inactive** checkbox. This displays the diaries and practitioners that are currently not in use at that location. Choose the room that is to be opened and choose the required diary template.



Click **Open Diary** to open the diary for that practitioner at that time. If a diary is not open for a practitioner then appointments are not bookable in that room at that time.



A practitioner may only have one diary open at any one time. This prevents double booking.

An open diary displays the location and room that the practitioner is occupying.

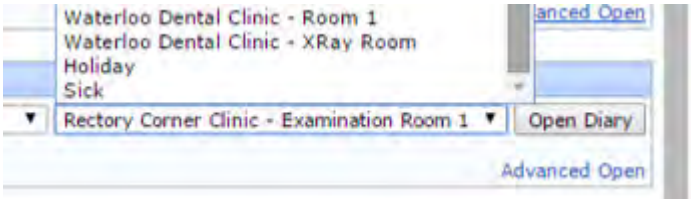
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To enable a practitioner to be available in one location or room for one period, then elsewhere for another, non-overlapping time period, click on **Advanced Open**. Select a new diary template and then the rooms that are available for that practitioner.

If viewing in room view, select the location from the drop-down list to display the diaries for the available rooms. Select the practitioner and diary type and click **Open Diary**.

To open the diary on the same day in following weeks, which is essential to enable future appointments to be booked in, the diary needs to be *cloned (page 10)*.

Special diaries exist to show that a practitioner is on holiday or is ill. To record that a practitioner is on holiday or sick, open the diary in the usual way and select either **Holiday** or **Sick** instead of a location. Holiday and sick leave can be reported using system reports.

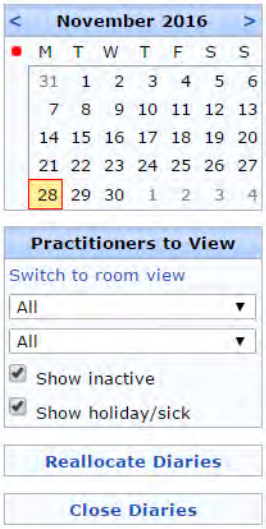


Reallocate a diary

Reallocating a diary is a useful function if a practitioner who has a full day of patients booked calls in sick. Another practitioner agrees to cover their diary but there is not enough time to reschedule all the appointments into a new diary. Another scenario where reallocating diaries might be used is if the room where a practitioner was going to see patients in becomes unavailable and they need to move to another room. The entire diary with appointments can be moved to another practitioner or to another room or both.

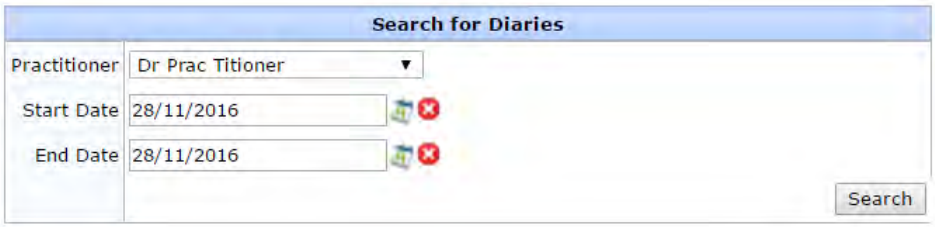
To reallocate a diary:

1. On the **Diaries** page, select **Reallocate Diaries**:

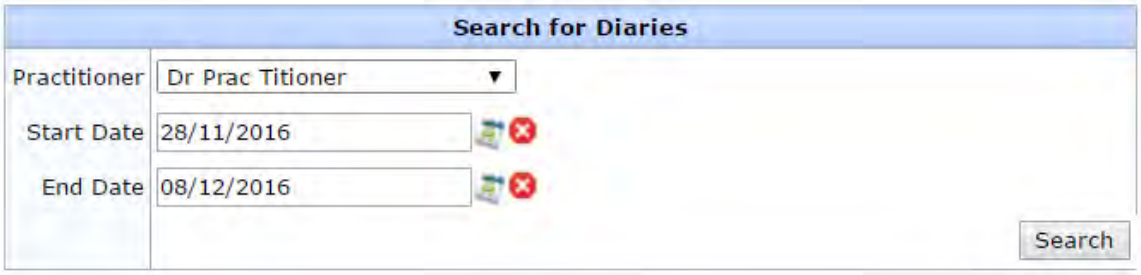


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2. Search for the diary you wish to reallocate by selecting the correct practitioner and the date or date range for which the diary needs to be reallocated. Click **Search**:



3. The **Diaries to Reallocate** form is displayed. Ensure that you have selected the correct diary.





4. If you want to reallocate the diary to another practitioner, select **Allocate selected diaries to** and select the practitioner.

   If you want to reallocate the diary to another room, select **Move selected diaries to** and select the room.

5. Click **Reallocate**.

Clone diaries

When you have diaries that have been opened for a specific day of the week and they need to be repeated each week, you can clone them.

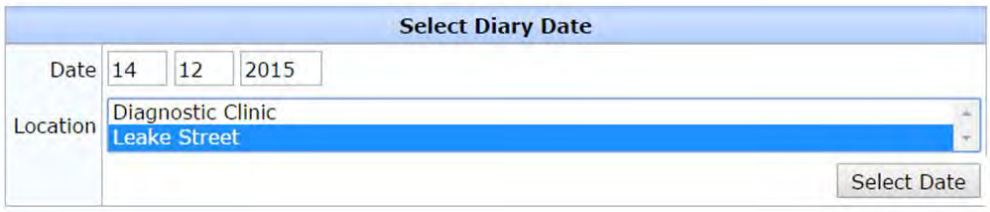
This function clones diaries from one week to another, not from one day to another within the same week. To clone a week's worth of diaries, open a diary for each working day and then clone each one individually.

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To clone diaries:

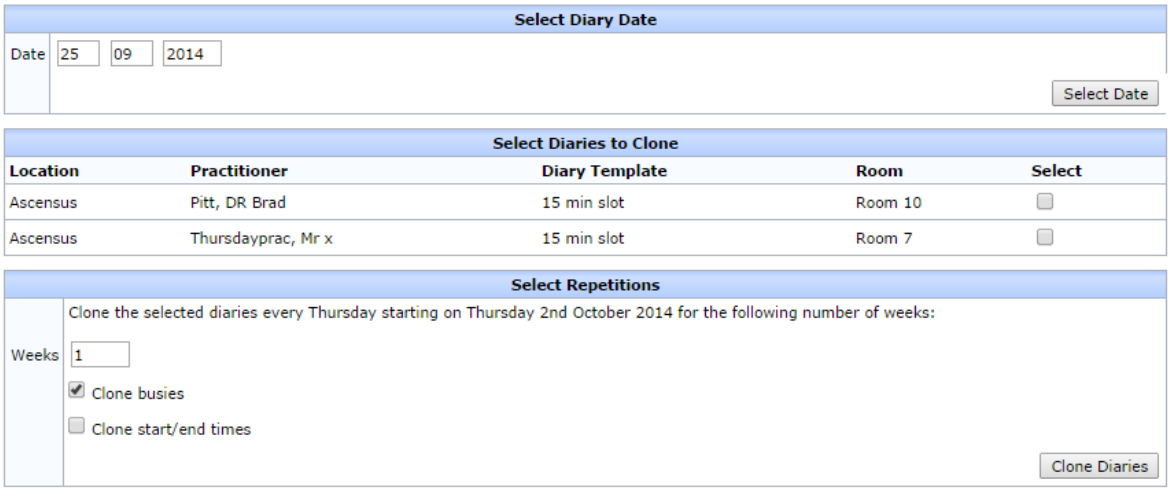
1. Ensure that the diaries that you want to clone have been opened and then select **Diary Clone** in the **Diary** menu.

2. Enter the date of the diaries that have been opened, select the locations and click **Select Date**.



   A list of diaries for that date and at the specified locations are displayed.

3. Select the diaries that need to be cloned and enter the number of weeks that they need to be cloned for.



4. If you want to clone busies as well, select **Clone busies**.

5. The start and end times of the diaries may have been altered after opening the original diary. If you select **Clone start/end times**, the altered start and end times are cloned. If you do not select it, the original times in the diary template are cloned.

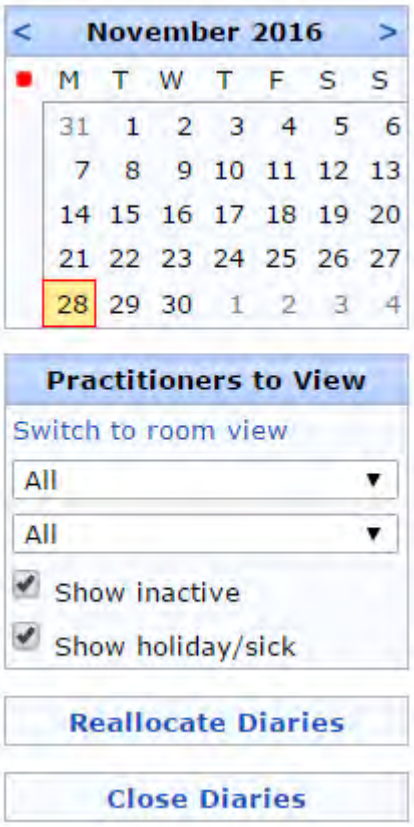
6. Click **Clone Diaries**.

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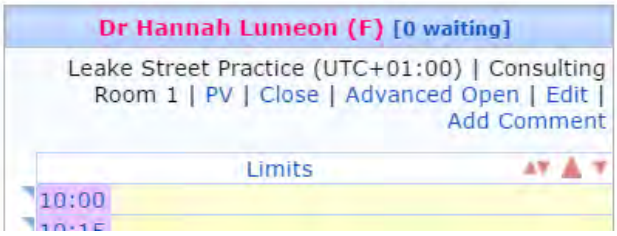
Close a diary

To close an individual diary, select **Close** in the diary.

To close a batch of diaries, select **Close Diaries** below the monthly calendar. Select the practitioner whose diaries need closing and enter the date range. Select the diaries that need closing and click **Close**.



In both cases, a message appears confirming that you want to close the diaries and explaining that appointments will be flagged for rescheduling.



Any appointments that were booked in those diaries appear in the appointment queue. See *Appointment queue (page 14)* for more information.

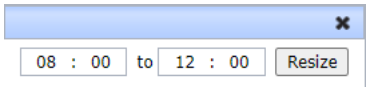
You cannot make bookings against a room that is closed.

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Resize a diary

You can resize a diary using the three sets of red arrows at the top and the two red arrows at the bottom of each opened diary.

Use the double triangles at the top of the diary to resize it by entering a new start and end time. These times are applicable for the current date only.



To change the start time of a diary:

- Use the larger up arrow to start the diary earlier by the length of one appointment slot.
- Use the smaller down arrow to start the diary later by the length of one appointment slot.

To change the end time of a diary:

- Use the larger down arrow to end the diary later by the length of one appointment slot.
- Use the smaller up arrow to end the diary earlier by the length of one appointment slot.

Diary configuration options

Date display

A core configuration setting enables you to see the date in the **Title Bar** at the top of the **Diaries** page.



Contact Lumeon Support if you want to enable or disable this feature.

Compressed diary view

A core configuration setting enables you to compress the diary view so that the diary displays only the appointment details and not the entire length of the appointment.

Contact Lumeon Support if you want to enable or disable this feature.

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Appointments

Appointment queue

Select **Appointment Queue** in the top menu bar to display a list of appointments that need rescheduling. You can rebook them either directly into a diary slot or by finding an available slot using the search engine. Alternatively, you can cancel the appointment.

Select the patient's name to open the patient details in a pop-up screen from where you can edit them, if required.



Leake St Practice

Patient	Date	Time	Practitioner	Type	Comments	Unbooked by		Schedule
Ms Julie Harris	08/08/2012	11:30	Dr Edward Evans	Physio New (60mn)		Mr Padraig Dennehy	Cancel Appointment	Diary or Schedule (search engine)
Mr Kevin Smith	17/09/2012	09:00	Dr Edward Evans	GP Consult FU (30mn)		Mr Markus Parris	Cancel Appointment	Diary or Schedule (search engine)
Ms Julie Harris	18/09/2012	12:00	Dr Edward Evans	GP Consult FU (30mn)		Mr Markus Parris	Cancel Appointment	Diary or Schedule (search engine)
Ms Julie Harris	21/09/2012	11:00	Dr Edward Evans	GP Consult FU (30mn)		Mr Karl Sturtridge	Cancel Appointment	Diary or Schedule (search engine)
Ms Julie Harris	17/10/2012	10:30	Dr Edward Evans	Physio New (60mn)		Mr Markus Parris	Cancel Appointment	Diary or Schedule (search engine)
Ms Julie Harris	17/10/2012	12:00	Dr Edward Evans	Physio FU (45mn)		Mr Grant Gilmore	Cancel Appointment	Diary or Schedule (search engine)
Mr Ken Green	17/10/2012	13:00	Dr Edward Evans	Physio FU (45mn)		Mr Malcolm Burns	Cancel Appointment	Diary or Schedule (search engine)
Ms Julie Harris	17/10/2012	16:15	Dr Edward Evans	Physio FU (45mn)		Mr Malcolm Burns	Cancel Appointment	Diary or Schedule (search engine)

Book an appointment

There are a number of ways that you can search for and book an appointment:

- Use a diary search. See *Diary search (page 14)*.
- Use the search engine. See *Search engine (page 16)*.
- Book from a patient's account using the diary. See *Book from a patient's account using the diary (page 17)*.
- Book from a patient's account using the search engine. See *Book an appointment from a patient's account using the search engine (page 17)*.
- Book when rooms and practitioners are separate. See *Book an appointment when rooms and practitioners are separate (page 18)*.

In all cases Conductor displays a screen to update the patient and appointment details.

Appointment slots are matched to practitioners based on the specialties they use. This ensures that appointment types can only be booked with practitioners who have the specialty to carry out that appointment type.

Additionally, only products that are available on a contract can be booked into a diary. They are only bookable for patients who are on that contract and meet the eligibility criteria for the appointment type.

The search engine only displays search results for future bookings but, if needed, you can book historical appointments using the diary.

Diary search

Select **Diaries** in the top menu, open the diary on the selected day and select the required appointment time.

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Once you have selected or created a patient, the **Create Appointment** page is displayed. This screen enables you to reconfirm the patient details with the patient while you are booking their appointment. You can also complete any mandatory fields on this form. Note that the mandatory fields may change based on the employer or other data. You can use the postcode lookup to search for a patient's address using the postcode.

Only appointments that can be billed can be booked and this is determined by the contract. The search engine only allows appointments to be booked in the future, whereas the diary search enables you to specify the exact slot required, subject to whether or not it can be paid for.

Field name	Description
Time to come in	Indicate the time that the patient should come in for their appointment - this is prior to the appointment time booked in the diary (and must be within 1 hour of the appointment start time). This is a core configuration setting and may not be visible in all systems.
Charge	Select who will be charged for the appointment (patient, company or insurance company).
Out of hours	Check this box to add an additional out of hours charge to the patient's account.
Contract	Select the contract the patient has. This will affect which appointments will be available to the patient and at what price. This is a mandatory field.
Appointment Date Requested	Option to enter patient's requested date of appointment.
Appointment Type	Select appointment type required. Available appointments and prices will be affected by which contract the patient has. If the appointment is highlighted red, it may mean that the patient is not eligible or that the appointment has been added to a contract without a pricing policy.
Problem	These can be set up in **Problems** in the **Product** menu and used for reporting purposes.
Anaesthetist	Select an anaesthetist from the drop-down menu if necessary. Anaesthetists need to be created as external practitioner and only appears if the appointment type has specified that an anaesthetist is required.
Discount Code	Discount codes can be created by selecting **Manage Discounts** in the **Discounts** menu. Click **Apply** to view the discounted price of the appointment.
Terms & Conditions	If terms and conditions have been set up as part of the appointment cancellation policy, check this box to confirm that the terms and conditions have been accepted by the patient before the appointment can be booked.
Booklet	Option to take this appointment out of a booklet if patient has purchased a booklet.
Treatment Cycle	Select or create a new treatment cycle.
Comments	These appear in the diary after the appointment name.
Authorisation Code	Can be acquired from insurance companies.
Send confirmation email	The email template can be set up in **Email Templates** in the **Communication** menu. A core configuration setting can be turned on to attach the confirmation letter to this email.
Send reminder email	If a patient has the Default email policy set up on their account, ticking this box will ensure they receive a reminder email. If a patient has the 'Disable' email policy set up on their account, they will not receive a reminder email even if this box is ticked. If a patient has the 'Custom' email policy set up on their account, they will receive an email reminder whether or not this box is ticked.
Send reminder SMS	If a patient has the Default SMS policy set up on their account, ticking this box will ensure they receive a reminder SMS. If a patient has the Disable SMS policy set up on their account, they will not receive a reminder SMS even if this box is ticked. If a patient has the Custom SMS policy set up on their account, they will receive an SMS reminder whether or not this box is ticked.
Send link to form	Sends a link to any forms associated to this appointment type.
Online payment	Enables e-commerce payment processing if Conductor is integrated with a payment provider.
Create confirmation letter	Automatically generates a letter when the appointment is booked which can be found in the patient's **Document List**.
Book another appointment	Returns you back to the diary page where you can select another time slot to book an appointment.
Send to appointment queue	Sends the appointment straight to **Appointment Queue** rather than booking the appointment in the diary.

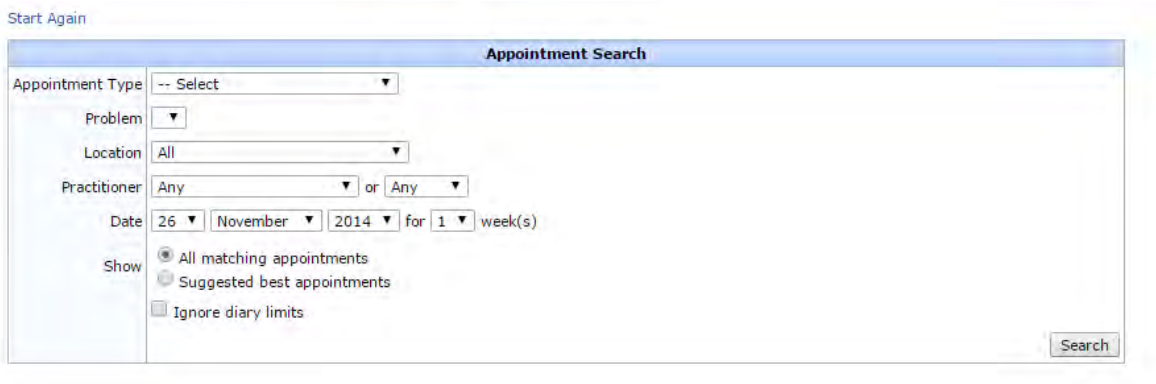
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Search engine

You can use the search engine to book any type of appointment but it is especially useful for multi-part appointments, which involve two or more practitioners. You cannot set up a multi-part appointment using the **Diaries** page.

To search for an appointment:

1. Select **Search Engine** in the top menu. This displays an **Appointment Search** box.



2. Enter the **Appointment Type**, **Problem**, and **Location** if required.

   Choose a named practitioner if desired, or select whether the patient wants to see a male or female practitioner. Enter a date and number of weeks for the appointment.

3. You can ignore **Ignore diary limits** which may have been set on a particular diary template.

4. You can select either:

   - **All matching appointments** - Displays all available appointments that meet the criteria.

   - **Suggested best appointments** - Clusters appointments next to each other to ensure that practitioners are getting the best use out of their diaries. In the case of multipart appointments, this option optimizes the resource chosen at the expense of the others, for example, the doctor's part of the appointment may be optimised over the nurse's part.

5. Click **Search** to display available appointments which match the entered criteria.

6. Confirm the appointment details and click **Create**.

It is possible to choose the default filtering modality used in the appointment Search dialog box. The two filtering behaviours available are Location by Appointment Type and Appointment Type by Location. Please contact Lumeon Support for more details.

Please note that a practitioner's availability is only offered if they have been assigned a specialty that matches the specialty assigned to the appointment type and the practitioner has a diary open for the requested date range.

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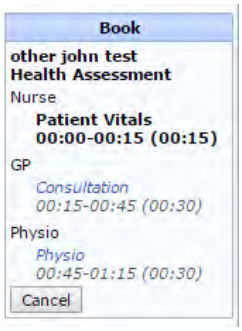
Book from a patient's account using the diary

To book an appointment from a patient's account using the diary, select **Book (Diary)** in the **Tasks** menu. Search for a suitable slot within the diary, click on the time, complete the appointment details, and click **Create**.

Book an appointment from a patient's account using the search engine

To book an appointment from a patient's account using the search engine, select **Book (Search Engine)** in the **Tasks** menu. Fill out the appointment criteria and then the appointment details, and click **Continue**.

The search engine displays a list of available time slots and locations. It indicates the distance of the location from the home postcode held on the customer's record. You can also search for locations close to a postcode not listed in the patient's details. This alternative postcode is retained until either the booking has been completed or you have cancelled out of the booking process.



Click **Go Manual** (at the bottom of the booking slot options) to go to the diary page. This enables you to book slot(s) by clicking directly on times in the diary. This option is turned on or off by security points and is not compatible if you have separate room and practitioner diaries.

Once you begin the process of booking an appointment and choose the appointment type, Conductor creates a reservation in the diary for the correct length of time to prevent anyone else from booking the slots you need. Lumeon recommends that you choose the appointment type quickly before you have any further conversation with the patient later in the process.

As soon as you leave the booking screen, Conductor releases the reservation.

If your computer crashes or you lose the connection, Conductor maintains the reservation for you. You can remove it manually later. You cannot remove other people's reservations unless you are a system administrator.

Once you have chosen an appointment slot, a screen is displayed to confirm all the appointment details. Once you have booked the appointment, a final confirmation screen is shown. The slot is only reserved for the slot chosen; Conductor does not reserve all the slots originally offered, so it is possible that an appointment that was visible could disappear if another user is looking at the same availability.

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Book an appointment when rooms and practitioners are separate

There is a core configuration setting that specifies that rooms have separate diaries from practitioners. If this setting is enabled, practitioners can have diaries opened for them and either be assigned to a particular room or not have any room assigned to them. If a practitioner has a room assigned to them they can still be booked into an empty room elsewhere.

When searching or booking an appointment for a patient, an extra field is available where you can select a room.

Multiple appointment bookings

To book multiple appointments for a patient, navigate to the patient's account and select **Book (Search Engine)** in the **Tasks** menu.

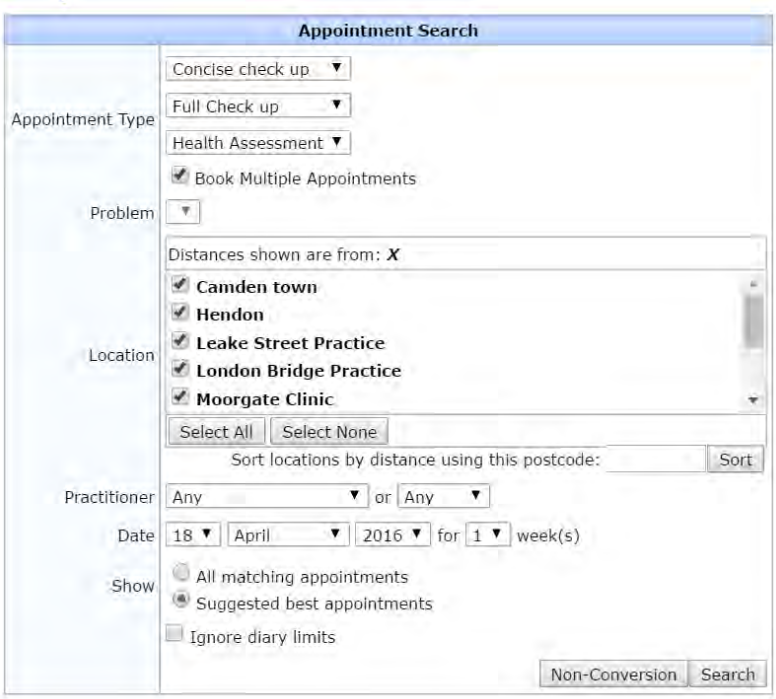
Complete the fields in the **Appointment Search** section and click **Continue**.



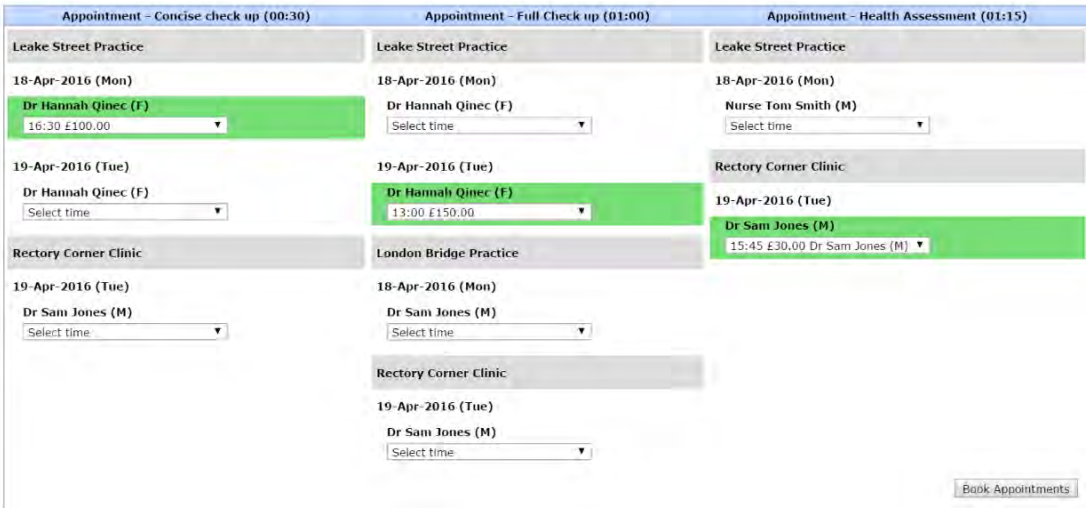
Please note, Conductor defaults to the option of selecting a single appointment. The search results and the **Appointment Details** page remain the same when booking a single appointment.

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Once you select **Book Multiple Appointments**, you can select more than one appointment. In this example, we are booking three appointments but this can be increased by making a change to core configuration settings.

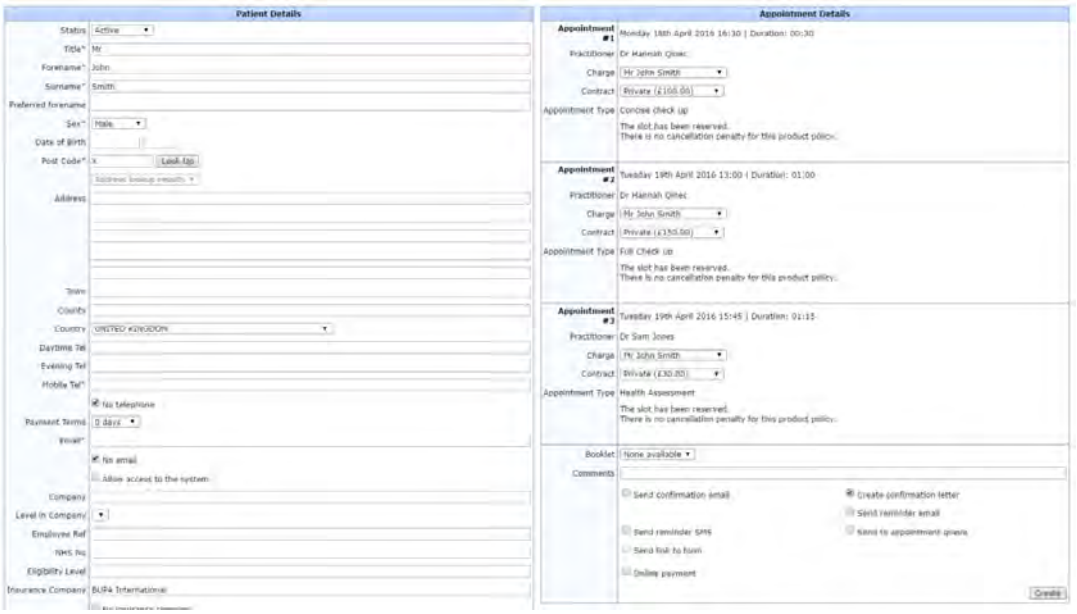


You are presented with the three appointment types, locations and available practitioners, and a drop-down menu with the timeslots to select. Once you have made a selection, your choices are highlighted in green and you can click **Book Appointments**. Click **Non-Conversion**, to record details if the appointment booking is not completed.



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The **Appointment Details** page is displayed, which shows the information for each appointment type. Check the charge and contract is correct and click **Create**.



Conductor creates appointment emails, messages, or letters, and sends reminders for each booked appointment.

Upgrades

Patients often have their appointments paid for by their employer, but may choose, in some cases, to upgrade their appointment to another more expensive appointment that better meets their needs. This process is called upgrading.

It is possible to upgrade to any appointment type that has the same primary participant specialty, on the same contract or on a private contract. For example, it is possible to upgrade from a health assessment to a physio appointment if it is the same type of practitioner carrying out both appointments. Age and sex-based rules are not ignored, but eligibility rules are. This ensures that it is not possible for a man to upgrade to a plus mammography appointment type, as this appointment type is only suitable for females.

Upgrade prices are not configurable. The cost of the upgrade is determined by the difference between the price of the upgraded appointment type and the original appointment type. The upgrade cost will never be less than zero. This means that the patient never gets a refund. If the upgraded appointment type is available on both the corporate and private contracts, the lower difference applies. For example:

- Original appointment type on corporate contract: £50
- Original appointment type on private contract: £80
- Upgraded appointment type on corporate contract: £150
- Upgraded appointment type on private contract: £100
- Upgrade price: (£100 - £80) = £20

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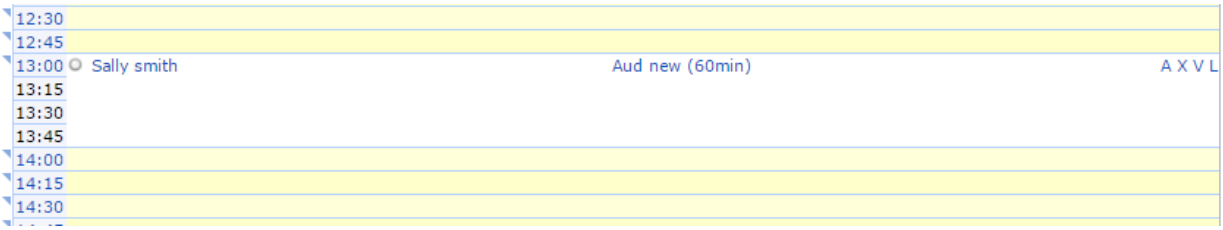
Upgrade cancellations

When an upgraded appointment is cancelled, a cancellation charge is created according to the policy of the original appointment type (on the corporate contract) and the price of the original appointment type (on the corporate contract). When the cancellation falls in the final tier of the policy (within late hours or tier 3 late hours, whichever is lower), an additional cancellation charge is created for the price of the upgrade (where non-zero), charged to the patient. The cancellation policy message is also updated to reflect this additional charge so that you are aware and can inform the patient.

To prevent abuse, you should always ask for credit card details to be stored when upgrading. This can be waived in the usual way at the point of booking.

Appointment tracking

When viewing diaries, the patient's name is displayed on the left of the diary slot and the appointment type is displayed in the middle.



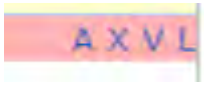
To the right of each appointment are letters which you or the practitioner should select to track the patient's progress through the appointment process:

Letter	Status
A	**Arrived** - You should select this when a patient arrives and reports to reception. This not only records the time that the patient arrived but also alerts the arrival to the practitioner by turning the circle next to the patient's name green.
X	**Did not attend** - You should select this if a patient did not attend their appointment (DNA). A prompt appears asking for confirmation of cancellation and requesting a reason for the non-attendance. A charge can be added or removed if needed. You can also cancel an appointment using this option if it is before the time of the appointment. You can also select **X** after a patient has arrived and is being seen. This indicates the appointment is abandoned for some reason by either the patient or practitioner. For example, faulty machinery, or the patient has to leave part-way through the appointment.
V	**Viewed** - The administrator or the practitioner must select this once the patient is taken in for their appointment. The circle turns yellow and alerts everyone that the practitioner is busy.
L	**Left** - The practitioner must select this when the appointment has ended. The admin team are unable to process any payment on the patient's account if this has not been selected. This turns the circle next to the patient's name to one of a variety of colours, depending on their contract.
D	**Discharged** - This is an optional status which indicates that the patient has left, or been discharged from, the clinic. For example, if a patient requires observation after an appointment.
P	**Payment** - Select this to take payment. If the circle turns blue, it means the patient is paying through a third party provider. If the circle turns pink, it means there is an outstanding charge against this patient.
F	**Form** - Indicates that for this appointment type, there is a form that the patient must fill in.

The **Arrived**, **Viewed** and **Left** time can be recorded for each section of a multi-part appointment. Conductor also records the arrival and leaving time of the whole appointment.

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If the letters are highlighted in pink it signifies that there is something critical in the patient's details:



The status of the patient is shown by the dot to the left of the patient's name.

Dot colour	Status
White	The patient is yet to arrive.
Green	The patient has arrived and is waiting. Someone in the reception of the practice usually selects **A** on the right of the appointment slot to activate this. The diary automatically refreshes as the day passes and new patients are shown in the diary.
Yellow	The patient is with the practitioner. The practitioner activates this by selecting **V**.
Blue	The appointment has finished. The patient does not have to pay because their provider is paying. The practitioner activates this by selecting **L**.
Pink	The appointment has finished. The patient has an outstanding charge.
Red	The appointment has finished. The patient has an unpaid booklet that they used to book the appointment.
Grey	The appointment has finished. The patient has a paid booklet that they used to book the appointment.
Black	The patient did not attend the appointment. This was activated by selecting **X** after the appointment time had passed.

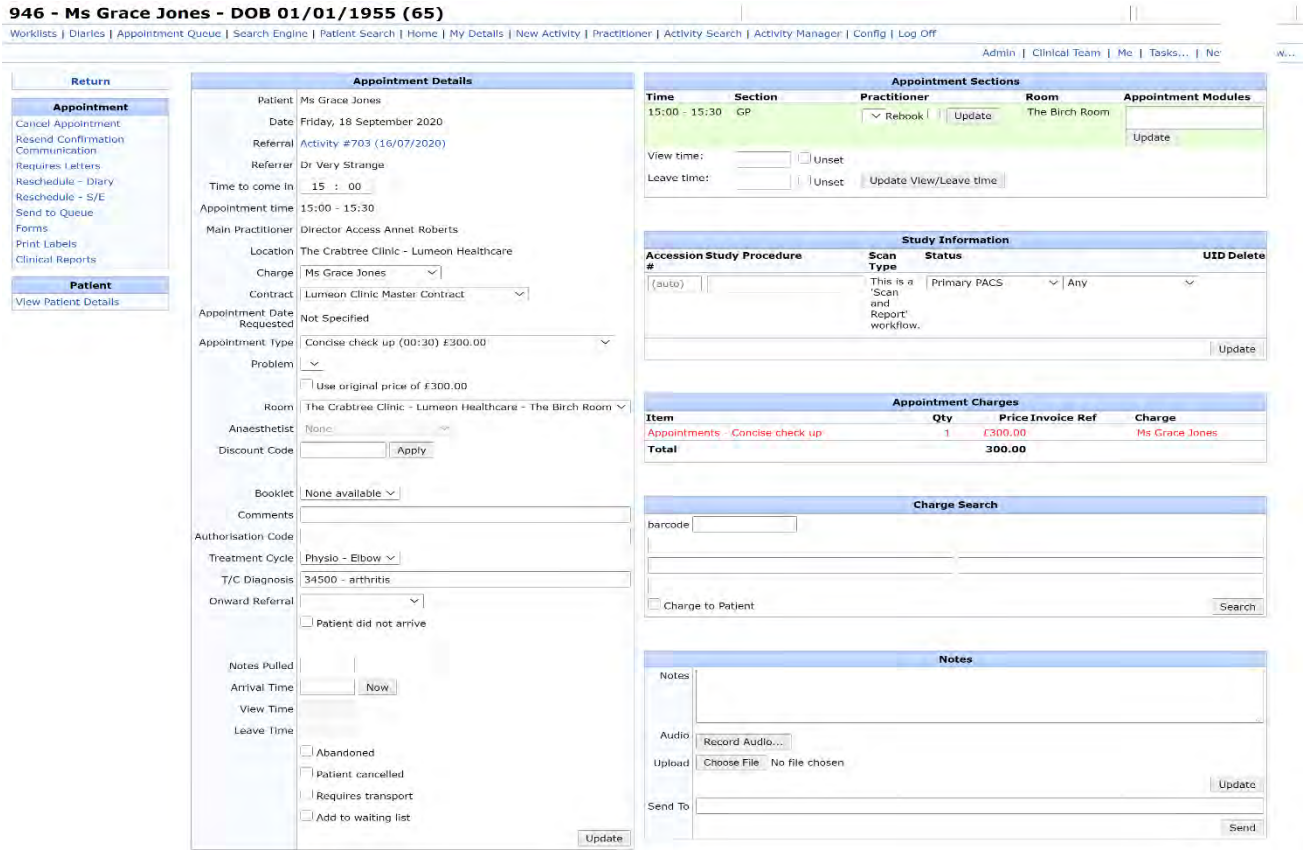
Appointment slots are highlighted in different colours to indicate who is paying for the appointment:

Colour of appointment slot	Status
White	The appointment is charged to the patient.
Blue	The appointment is charged to the patient's insurance company.
Green	The appointment is charged to the patient's company.
Orange	The appointment is charged to the patient who has membership.
Purple	The appointment has been booked online.

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Appointment details

Select an appointment name in the diary or from within a patient's account to display the **Appointment** booking confirmation screen. Please note that the price displayed is exclusive of VAT.



From the **Appointment Details** page, you can:

- Change who the appointment is charged to
- Change which contract the appointment has been booked under
- Change the appointment type and select whether to use the price of the original appointment
- Add a problem
- Apply a discount code to the appointment
- Pay for the appointment through a booklet
- Add comments to the appointment
- Add an authorisation code to the appointment
- Link the appointment to a treatment cycle
- Add a diagnosis code to the appointment
- Add an onward referral to the appointment

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- Change the arrival/view/leave time or unset them
- Indicate that a patient has cancelled
- Indicate that a scan was abandoned

In the **Appointment Section**, you can change the practitioner who will see the patient for each section of the appointment.

To add a non-appointment product charge to the appointment, enter the first few letters of the desired product to be charged into one of the boxes in the **Charge Search** box and click **Search**, ensuring that the correct payee has been selected in the drop-down list. Alternatively, use a barcode scanner to enter a barcode in the shorter box in the top left hand corner.

Use the options in the **Appointment** menu on the left to carry out the following tasks:

- Cancel the appointment. Give a reason and select whether to add or remove a charge and/or send a cancellation confirmation email (you can cancel historic appointments). As soon as a booking is cancelled, the diary slot is released and bookings can be made into that slot.
- Resend the confirmation email/communication.
- Reschedule the appointment through the diary or search engine (it is possible to reschedule historic appointments) and apply a cancellation policy if necessary. Choose whether the patient is sent a new confirmation email/letter. It is also possible to amend the 'Time To Come In' field.
- If an appointment is rescheduled within the timescale specified within the cancellation policy, the cancellation is evoked. The user can still select a reason for the cancellation, which specifies whether the cancellation charge is applicable under the circumstances or not. You can use the 'original price' for the appointment charge and any additional charges, if price(s) change due to the rescheduling.
- Send the appointment to the appointment queue from where it can be cancelled or rescheduled.
- Access clinical forms related to the appointment.
- Access clinical reports related to the appointment.

Select **View Patient Details** to navigate to the patient's account.

If the booking is a multi-part appointment, the time, room, and practitioner for each different section of the appointment is displayed:

Appointment Sections			
Time	**Section**	**Practitioner**	**Room**
09:15 - 09:30	Patient Vitals	Prac Titioner (F) ▼ Update	Examination Room 1
09:30 - 10:00	Consultation	Prac Titioner (F) ▼ Update	Examination Room 1
10:00 - 10:30	Physio	Prac Titioner (F) ▼ Update	Examination Room 1

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Search for an appointment ID

System reports often list appointment IDs. To search for an appointment using an appointment ID, select **Appointment Search** in the **Diary** menu. This enables you to access specific appointment IDs easily.

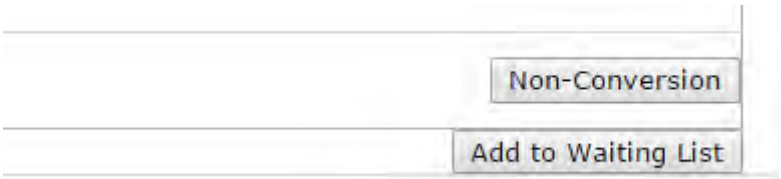
Waiting lists

You can add patients to waiting lists in the following two scenarios:

- There is no appointment available that the patient can attend so no appointment is booked.
- An appointment is booked for a patient but they would like to be informed if there are any cancellations so they can change their appointment time.

To add a patient to a waiting list when there are no appointments that they can attend:

1. select **Add to Waiting List** when using the Search Engine from the patient's account.

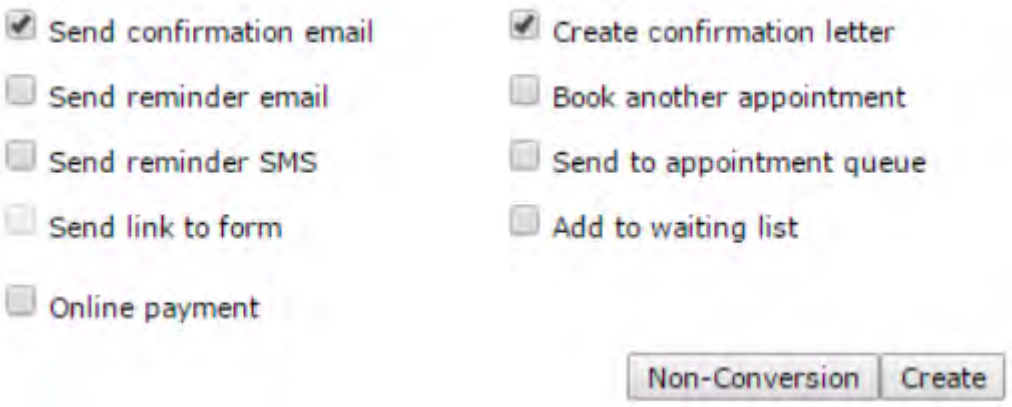


2. Indicate how long the patient should stay on the waiting list and click **Add**.



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To add a patient to a waiting list to indicate that the appointment they are booking is not at their preferred time, select **Add to Waiting List** on the **Appointment Details** screen when booking the appointment.



Patients that have been added to a waiting list appear in a **Waiting List Worklist**. If they are patients that do not yet have an appointment, you can **Book** an appointment. If they are patients that have an appointment booked but were hoping for another time slot, you can **Reschedule** their appointment.

If an appointment is booked or rescheduled, the patient disappears from the waiting list.

Alternatively, you can use the diary waiting list functionality to add the details of patients who wants to be put on a waiting list. This functionality is controlled by the *Diary.PatientSearch* security point. Contact your system administrator or Lumeon Support if you want to enable this functionality.



Please note, a patient cannot be added twice to a waiting list.

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Classes

See ***Classes & Booklets in Lumeon Conductor*** for information on how to:

- Set up class settings and class types
- Add classes to contracts
- Create classes in diaries
- Book patients into classes

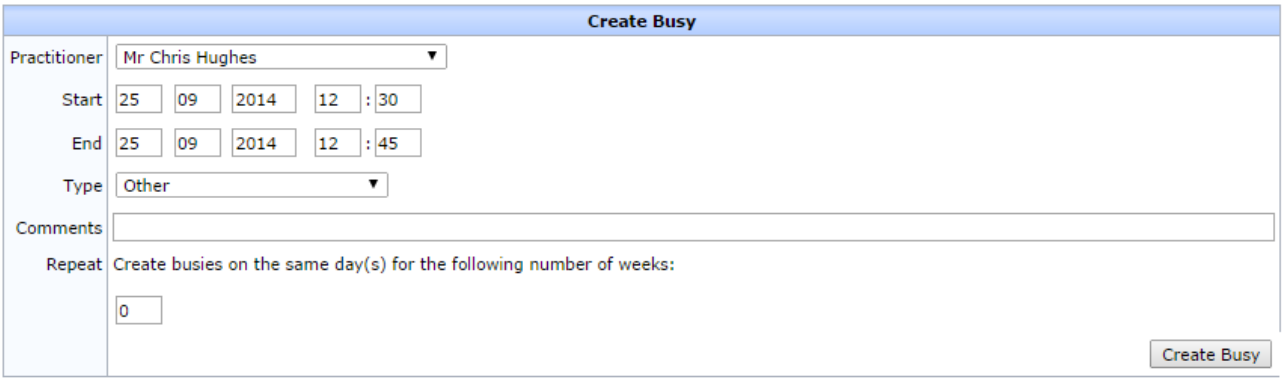
Shoehorn

It may be necessary to book two patients into the same time slot. To do this, click on the blue triangle to the left of the time slot and this enables you to book a second appointment, class or busy.

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Busies

Busies are slots when appointments cannot be booked. Busies are booked like appointments. Select a time slot in an open diary. Fill in the information in the **Create Busy** box on the right. Ensure that the start and finish time are entered in 24hr format. Select the busy type and add any comments. You cannot create a busy if an appointment or class has already been booked in the time slot.



You can repeat busies on the same day(s) for following weeks by entering the number of weeks that the busy needs to be repeated. Please note that if future diaries have not been opened yet, the busies cannot be created. Click **Create Busy**.

To remove a busy from a diary, find the busy time slot in the diary and click **Unbusy**.

To create busy types, select **Busy Types** in the **Diary** menu.

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Booklets

See ***Classes & Booklets in Lumeon Conductor*** for information on how to:

- Create booklet types
- Add booklets to a patient's account
- Use booklets

Payments

For information on the accounting functionality in Conductor, including creating charges, invoices and proformas, making payments, managing discounts and redeemable credit rules, and using the finance tools, see ***Accounting in Lumeon Conductor***.

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Patient management

Add a patient

To create a new patient:

1. Click **Patient Search** to display the **Patient Management** window. A list of existing patients displays on the left and the **Create Patient** form displays on the right.
2. Enter the new patient's details in the **Create Patient** form using the table of fields below. Fields may vary depending on configuration.
3. Click **Create**. If you have not completed all the mandatory fields, you cannot create the patient.

When you create a new patient record, Conductor displays any records that have similar details to avoid duplicate records being created. Click **Ignore** if you want to continue to create the new record.

Patient fields

Use the following table to complete the patient's details. The fields displayed may vary depending on your configuration. Fields with an asterisk (*) are mandatory.

Field name	Description
Status	Select the patient's status from the drop-down list.
Office reference	Enter the office reference if you want to link the patient to a company.
Account on hold	Select this to prevent this patient from booking any appointments and creating any further charges.
Title*, Forename*, Surname*, Preferred title, Preferred Forename, Preferred Surname, Sex*, Date of Birth, Marital Status, Post Code*	Enter the patient's personal details. Additional addresses can be added once a patient's account has been created.
Daytime Tel, Evening Tel, Mobile Tel*	Enter one or more telephone numbers for the patient. If a patient's telephone numbers are not known, select **No telephone**.
Language preferences	Enter the patient's language preference.
Payment Terms	Used to set up invoice due dates.
Email*	Enter the patient's email. If you do not know it, select **No email**.
Allow access to the system	Select this checkbox to send the patient login details for the patient portal (providing an email address has been entered).
Alternative Email Address	Enter an alternative email address for the patient, if required.
Use for communication	Select this to use the alternative email address for communications. Leave it clear to use the main email address.
Company, Office	Enter the company. The field autocompletes as you type the first few characters of the company name. Then select the company office from the drop-down list.
Employee Ref	Enter the patient's employee reference number.
Company Contact Name	Enter the company contact name. The field autocompletes as you type the first few characters of the name.
NHS No	Enter the National Health Service number. A message displays if the number is not a valid format.
Eligibility Level	Enter the eligibility level of the patient within their company.

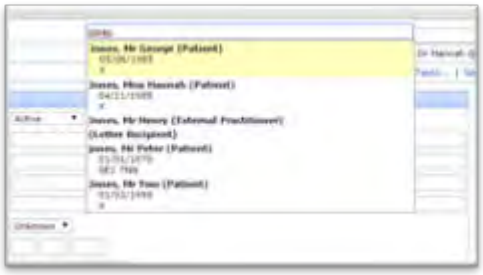
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Field name	Description
Cost Code, Cost Centre	Enter these to display them on invoices.
Contract	Select the patient's contract. This determines what a patient pays for products.
Enquiry Source	Enter the enquiry source for the patient.
Insurance Company	Enter the insurance company. The field autocompletes as you type the first few characters of the company name. If the patient is a private patient, select **No insurance company**.
Policy Number	Enter the policy number as specified by insurance company.
Renewal Date	Enter the insurance policy renewal date.
Limit	Enter the patient's insurance excess.
Alternate Invoicee	Either enter the name of an existing patient or start typing and click **New** to enter the details of a new user.
Default Invoicee	Select from the patient, alternate invoicee, company, or insurance company.
Enable automatic appointment payments	Select so that payment is taken automatically when an appointment is booked by the patient.
Occupation	Enter the patient's occupation.
Job Title	Enter the job title to be shown in letters and clinical reports.
Comments	Enter any comments that you want to appear in the patient details.
Important	Enter notes that you want to appear in the overview of the patient details in both administrator and practitioner view of the diary.
Critical	Enter critical comments that you want to appear when booking a patient in for an appointment. Part of the timeslot in the diary is highlighted pink. If you hover over the patient's name, these comments display in both administrator and view of the diary.
Medical Notes At	Select which location patient medical notes will be stored at.
Practitioner Gender	Select if the patient has a preference for a male or female practitioner. If selected, a message displays when booking an appointment.
Preferred Location	Enter to display the patient's preferred location.
GP	Enter the patient's GP. The field autocompletes as you type the first few characters of the GP's name.
Next of Kin	Enter next of kin details.
Old Patient	Select all the options that are required.
Allow email/postal/ telephone/SMS marketing/ Mail shots/Magazines and clinical	Select all the options that are required.
Do not recall	Applicable to clients using recall strings.
Email/SMS reminder	Select one of the following options: · **Default** - A patient only receives a reminder if the **Send reminder SMS/Email** checkbox is selected at the time of booking an appointment. · **Disable** - A patient never receives a reminder even if the **Send reminder SMS/ Email** checkbox is selected at the time of booking an appointment. · **Custom** - A patient always receives a reminder for all appointments they have booked whether or not the **Send reminder SMS/Email** checkbox is selected at the time of booking an appointment. Enter the time period, in hours, for email or SMS reminders.
Consent	Enter whether the patient has given consent for treatment. This is a field for reporting. There is also a configuration setting that displays a banner at the top of the **Patient Details** page asking for confirmation of reconsent. To enable or disable this option, contact Lumeon Support.
Requires Guardian	Select if the patient requires a guardian.
Consent Date	Defaults to the day that the patient is created but you can change it.

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Search for a patient

The easiest way to search for a patient is to use the global search field at the top of the screen on the right-hand side. From every screen in Conductor, you can search for patients and individuals quickly and easily. To search, use the form `Surname, Forename`. You can enter the name in sections. For example, typing `Jon, Kev` would return the individual Kevin Jones. You can also search for a patient ID. If the ID is only 2 digits, place a 0 before them.



To search for a patient using different parameters:

1. Select **Patient Search** in the top menu bar to display the **Patient Search** form.



   Depending on your configuration, other search fields may be available. Contact your system administrator or Lumeon Support if you want to enable or disable other fields.

2. Enter, in whole or in part, any of the details of the patient and click **Search**. For example, you could enter part of the patient's last name or their patient ID. The search result displays a list of all patient names which match the entered details.

3. Select the correct patient from the list to display the patient record.

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Patient records

Once you have selected a patient, the menu on the left provides a number of links to patient details and tasks. Some of these features are configurable and may not be available.

The **Patient** menu contains the following options:

Patient menu option	Description
Overview	Shows a patient's personal details, current treatment cycles, appointment history, account balance, and any active activities on their account.
Patient Details	Displays patient details and enables you to enter or update any details.
Addresses	View, edit and add patient's addresses. Choose from: · Card · Temporary · Correspondence · Billing You can set **Use for all correspondence** against an address. When set, correspondence always goes to this address. By default, the it is set for the patient's primary address. If a new address of type **Correspondence** is added to the patient, **Use for all correspondence** is automatically set for that address and removed for any existing address.
Authorised Third Parties	Add third party contact information against a patient record which can be used to verify the third party's authorization to speak on behalf of the patient.
Additional Insurance Companies	Store the details of additional insurance companies. Use the **Order** field to indicate the order in which the insurance companies should be billed.
Additional Companies	Add or view details of additional companies that the patient is associated to.
Membership	Displays the patient's membership details and options to create a new membership or join an existing membership.
Booklets	Displays existing booklets, with how many sessions are remaining, and enables you to add booklets to a patient's account. See *Booklets* for more information.
Appointments and Classes	Displays a list of past and present appointments and classes. You can add related non-appointment product charges by clicking on an appointment or class.
Charges	Add charges and prepare invoices.
Invoices & Payments	Displays outstanding and paid invoices. You can take payments and allocate them to invoices. See *Prepare and create invoices*.
Client Log	Displays a list, in date order, of all activity that has taken place on that patient's record. Each entry shows the date and time of the activity and which user it was performed by. See *Add an event to the client log (page 36)*.
Secure Email Audit Log	This feature is enabled through a core configuration setting. It allows administrators to view the various statuses of any secure email distributed to a patient. Contact your system administrator or Lumeon Support if you want this feature enabled or disabled.
Paper Archive	Scan and upload letters, reports, and other documents. See *Add files to patient accounts (page 37)*.
Treatment Cycles	Open, review, or close treatment cycles. See *Treatment cycle management (page 38)*.
Reports	You can display and create clinical reports. In the appointment bar at the top, select the appointment for which you want to view reports. See *Clinical reports (page 39)*.
Forms	Display and create patient forms. See *Clinical forms (page 39)*.
EMR	Displays a patient's electronic medical records. Only clinical staff have full access to this. Non-clinical staff can access the journal page only, which records a list of patient history, letters, and forms. Notes can be added to the journal entry by non-clinical staff. See *View and update a patient's Electronic Medical Record (EMR) (page 39)*.
Direct Debit Instructions	Set up direct debits. See *Create direct debit instructions*.
Prescriptions	Add medication and view past prescriptions. See *Prescriptions (page 40)*.
Labs	Request lab tests for the patient. See *Order patient lab tests (page 40)*.

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Patient menu option	Description
Letter CC Groups	Add recipients to a group which can be copied into a letter. See *Create letter CC groups (page 40)*.
Activities	Displays the patient's activities.
Referrals	Open a patient's referral. This is linked to pathway configuration.
Appointment Types	Displays all appointments that the patient is eligible for based on their contract. See *Eligible appointment types (page 41)*.
Goals	View and create goals for patients.

The **Tasks** menu has the following options:

Task menu option	Description
Book (Diary)	Enables appointments or classes to be booked via the diary screen. See *Book from a patient's account using the diary (page 17)*.
Book (Search Engine)	Enables appointment or classes to be booked by searching for available slots. See *Book (Search Engine) (page 17)*.
Create Letter	Create letters to the patient. See *Create a letter for a patient (page 42)*.
Document List	Displays a list of all documents relating to a patient such as letters, paper archive, forms, and clinical reports. See *View patient documents (page 42)*.
Exercise Program	Displays any exercise programmes given to the patient. See *Patient exercise programmes (page 43)*.
Upload Photo	Upload a patient photo. See *Upload a patient photo (page 45)*.
Print Labels	Download labels with patient details in RTF format. See *Print patient labels (page 45)*.
Check Duplicate	Enables checking and merging of duplicate patient records. Conductor orders the search results by relevance when checking duplicates from a patient's account. Results with closer field matches display at the top of the list. See *Check duplicate patient records (page 45)*.

Patient menu options

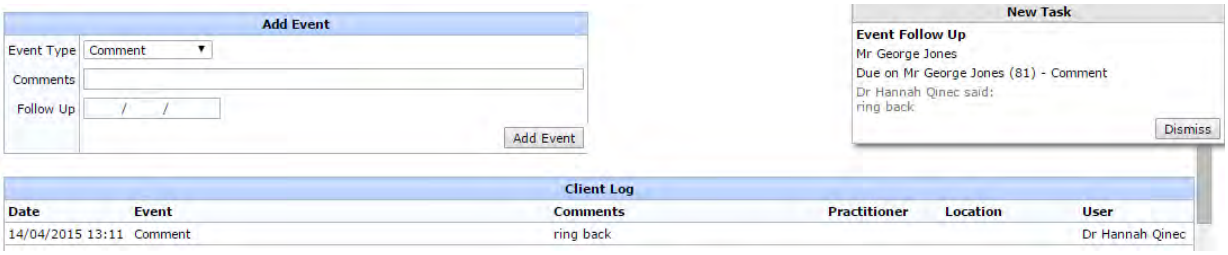
Patient future appointments

To download a document detailing a patient's future appointments, click on the **P** next to **Future Appointments** on the patient **Overview** page.



Add an event to the client log

The client log records all activity associated with a patient. After searching for a patient, click on **Patient Log** in the **Patient** menu.



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To add extra events to the client log:

1. Select the **Event Type** and fill in the appropriate comments.

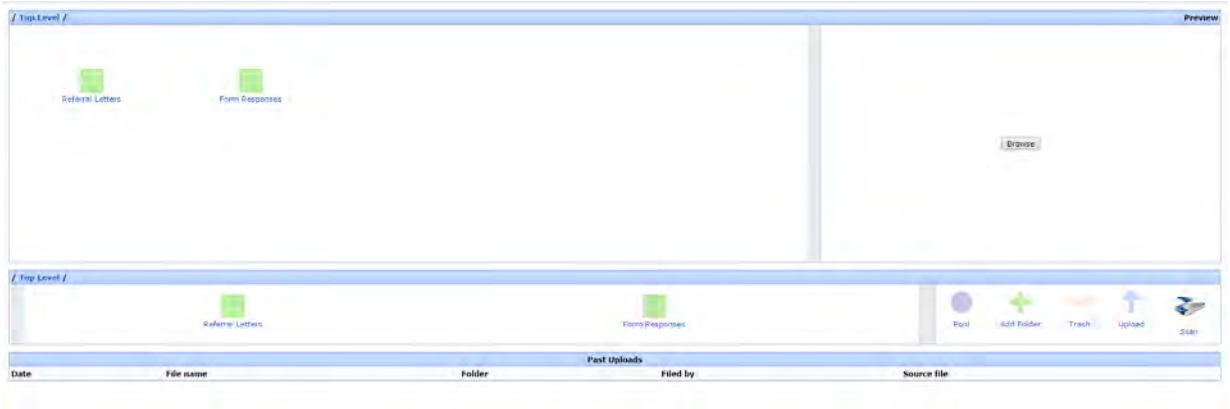
   If you enter a **Follow Up** date, the event is created as a task for you. You can reassign this task to another user if necessary.

2. Click **Add Event**.

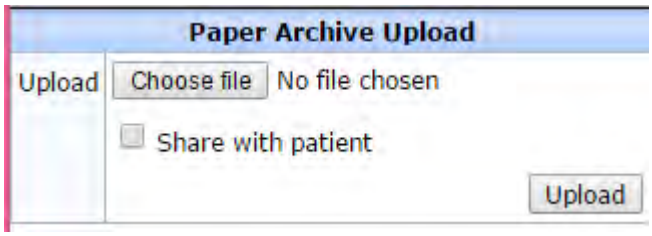
If you have system administrator permissions, you can add new event types by selecting **Event Types** in the **Runtime Options** menu.

Add files to patient accounts

You can view and upload patient files in **Paper Archive**. The top level contains folders represented by green squares. Click on one of these folder links to display the documents inside. You can view past uploads in a list at the bottom of the page.



To upload a file, click on **Upload**, choose the file, and click **Upload** in the pop-up box.



Alternatively, you can scan files into the paper archive.

To view a file, select the file name and then the image, and click **Browse** in the **Preview** box on the right.

To delete a file, select and drag the file over **Trash**. Deleted files will stay indefinitely in the trash folder.

Clicking on **Pool** displays documents that have been uploaded via the **Paper Archive Pool**.

To rename a file, select the file name and then the file image, then change the name in the **Preview** box on the right.

To rotate a document, click on the file name and then the file image. Click **Rotate** in the **Preview** box on the right.

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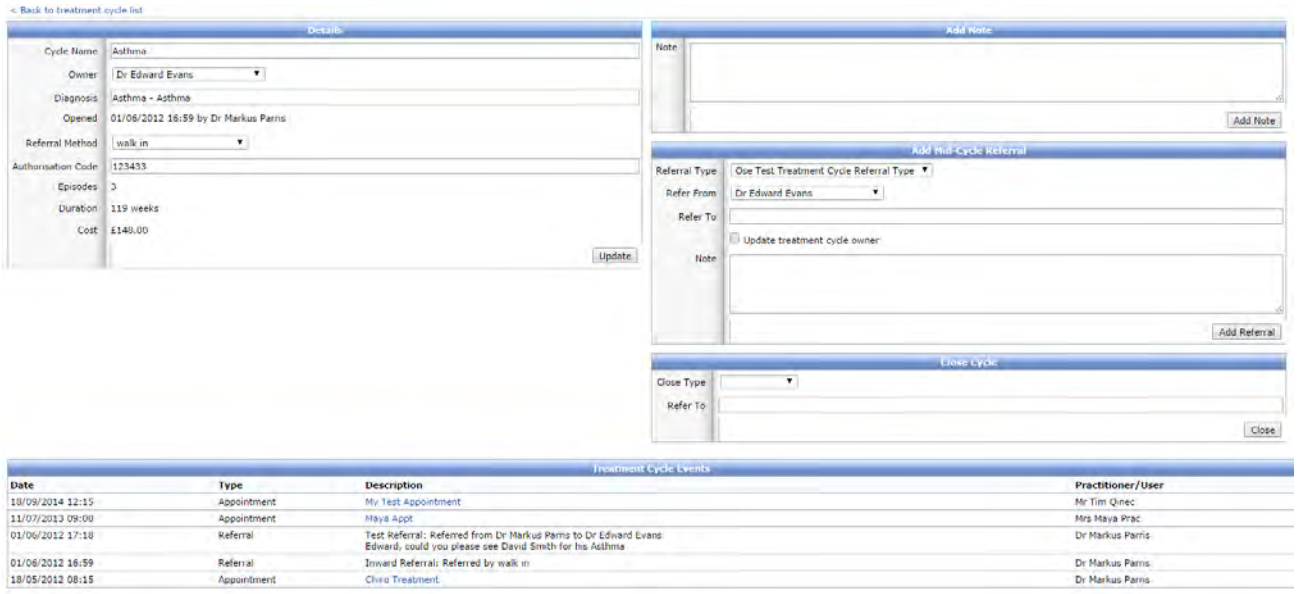
To join files, click on the name and the images of both files, and click **Join**. Joined files are shown with a blue circle. To split the files, click on the name and image of the blue circle and click **Split**.

Clicking on **Share with patient** when uploading or clicking **Shared** from the document detail box shares the file with the patient in the patient portal.

Treatment cycle management

A treatment cycle is a group of appointments that are tied together for the purpose of monitoring treatments. To open a new treatment cycle for a patient, search for that patient and then select **Treatment Cycles** in the **Patient** menu. Fill in the cycle name and other details. Click **Open**.

Select an existing treatment cycle to update its details.



You can also attach notes to a treatment cycle. These notes are attached to the cycle and not individual appointments. This means that there is continuity in the group of appointments and that individual groups of appointments from patients who attend more than once for different conditions over a long period of time may be monitored individually.

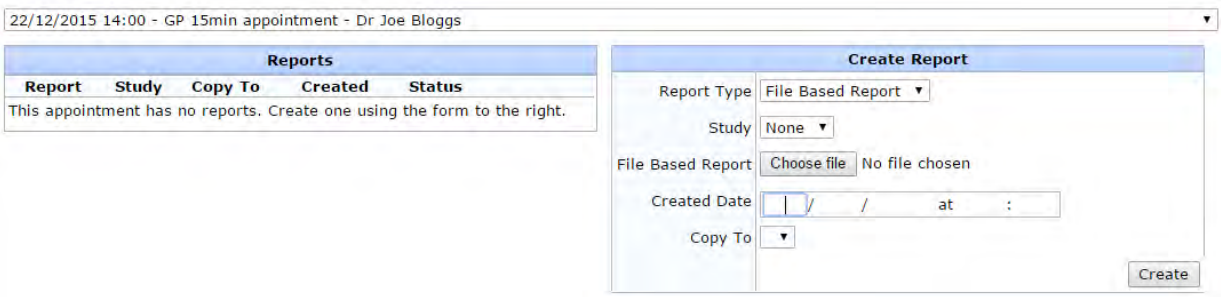
If adding a mid-cycle referral, choose the appropriate referral type and referrer in the **Mid-Cycle Referral** form. The **Refer To** field works on an autocomplete system. Click **Add Referral**.

When a patient's treatment is complete, the practitioner should complete the **Close Cycle** section. The practitioner can enter a reason for discharge as well as an on-going referral destination, if appropriate. This enables your organization to monitor who they refer patients to.

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Clinical reports

To view or create clinical reports for a patient, search for a patient, then select **Reports** in the **Patient** menu. At the top of the page, select the appointment for which you want to view or create reports.



To create a new report for an appointment, select the **Report Type** in the **Create Report** form on the right, and click **Create.**

The **Copy To** drop-down menu, allows the patient's GP to be copied in on the clinical report (if the clinical report template has been designed to incorporate this).

Select a report in the **Reports** list on the left to open the report so that information can be entered. Once the form is complete, click **Generate** to download it as an RTF file once **View** is clicked.

Clinical forms

To create or view forms for a patient, select **Forms** in the **Patient** menu.

To create a new form for a patient, select the **Form Type** in the **Create Form** form on the right, and click **Create**.

Created forms appear in the **All forms** list on the left. Click on the **Form Name** to fill in the form fields. Make sure that you click **Save Section** after each section is completed.

View and update a patient's Electronic Medical Record (EMR)

The EMR journal is the master copy of all the data recorded for a patient. To access it, select **EMR** in the **Patient** menu after searching for a patient. You can view a patient's complete history and a timeline of all events.

To add a journal entry, fill in the required fields and click **Add Entry**.

You can group events by type or show some sections and not others. To do this, use the **View** menu. The default view is set to show everything in reverse chronological order. The journal view also uses the colours entered in the form sections to highlight data where appropriate so that it stands out.

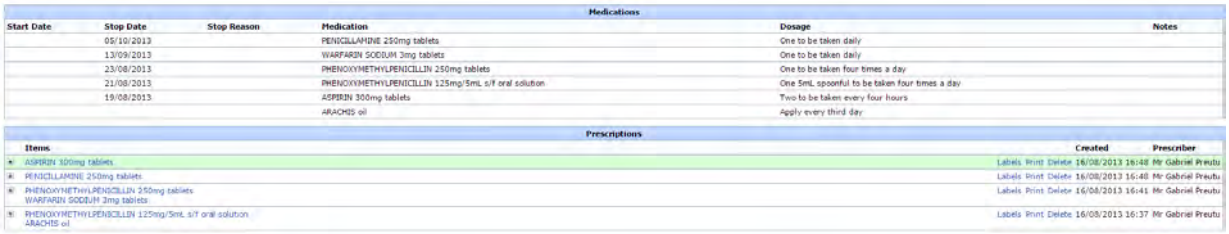
You can amend or delete journal entries by selecting the entry in the journal. The **Amend** and **Delete** options appear at the bottom. Click **Amend** to re-enter data in the journal entry. Once this is done, click **Amend Entry** to save changes. Once the data is saved, it is highlighted with a purple border. The border indicates that the data has been changed from the original entry.

To see a history of changes, click again on the box and click **History**. A complete list of changes, and who made them, appears.

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Prescriptions

You can view patient prescriptions and medications. To do this, search for the patient and then select **Prescriptions** in the **Patient** menu.



Medications

Start Date	Stop Date	Stop Reason	Medication	Dosage	Notes
	05/10/2013		PENICILLAMINE 250mg tablets	One to be taken daily	
	13/09/2013		WARFARIN SODIUM 3mg tablets	One to be taken daily	
	23/08/2013		PHENOXYMETHYLPENICILLIN 250mg tablets	One to be taken four times a day	
	21/08/2013		PHENOXYMETHYLPENICILLIN 125mg/5mL s/f oral solution	One 5mL spoonful to be taken four times a day	
	19/08/2013		ASPIRIN 300mg tablets	Two to be taken every four hours	
			ARACHIS oil	Apply every third day	

Prescriptions

Items	Created	Prescriber
ASPIRIN 300mg tablets	Labels Print Delete 16/08/2013 16:48	Mr Gabriel Preutu
PENICILLAMINE 250mg tablets	Labels Print Delete 16/08/2013 16:48	Mr Gabriel Preutu
PHENOXYMETHYLPENICILLIN 250mg tablets WARFARIN SODIUM 3mg tablets	Labels Print Delete 16/08/2013 16:41	Mr Gabriel Preutu
PHENOXYMETHYLPENICILLIN 125mg/5mL s/f oral solution ARACHIS oil	Labels Print Delete 16/08/2013 16:37	Mr Gabriel Preutu

A list of prescriptions is listed with options to download labels, or print or delete a prescription.

Order patient lab tests

To order patient lab tests, search for the required patient, and then select **Labs** in the **Patient** menu.

Select the appointment for which the lab test is required and click **Next**. Enter the practitioner on whose behalf the lab tests have been requested. This box works on an autocomplete system. Click **Next**. Type in the required test and click **Add Tests.** Fill in the **Prepare Request** form and click **Create**. You can print requested tests by clicking **Print**.

Conductor can be integrated with an external pathology service. In this case, a digital request is sent to that selected provider and results reported directly into Conductor.

Create letter CC groups

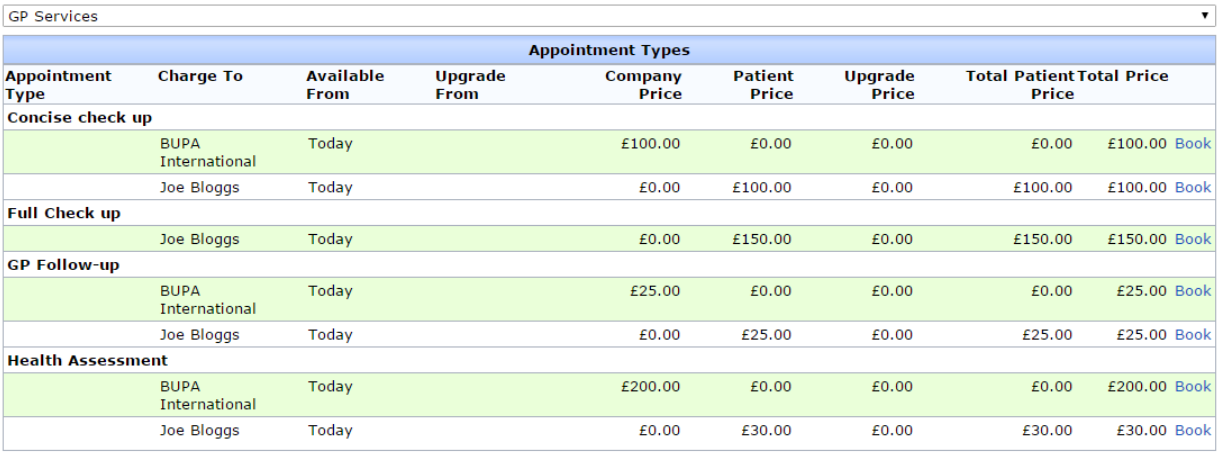
A letter CC group specifies a group of people who appear as copy to recipients of a letter. Only one copy of the letter is generated, which includes the details of all members of the group.

Search for the required patient and select **Letter CC Groups** in the **Patient** menu. Fill in the box on the right and click **Create**. Once the group has been created, it is possible to search for external practitioner group members by typing in the autocomplete box and clicking **Add**.

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Eligible appointment types

To view which appointment types a patient is eligible for based on their contract, select **Appointment Types** in the **Patient** menu. Select a specialty from the drop-down menu at the top. If no specialty is selected, Conductor uses the first specialty on the list as the default.



GP Services

Appointment Types

Appointment Type	Charge To	Available From	Upgrade From	Company Price	Patient Price	Upgrade Price	Total Patient Price	Total Price	
Concise check up									
	BUPA International	Today		£100.00	£0.00	£0.00	£0.00	£100.00	Book
	Joe Bloggs	Today		£0.00	£100.00	£0.00	£100.00	£100.00	Book
Full Check up									
	Joe Bloggs	Today		£0.00	£150.00	£0.00	£150.00	£150.00	Book
GP Follow-up									
	BUPA International	Today		£25.00	£0.00	£0.00	£0.00	£25.00	Book
	Joe Bloggs	Today		£0.00	£25.00	£0.00	£25.00	£25.00	Book
Health Assessment									
	BUPA International	Today		£200.00	£0.00	£0.00	£0.00	£200.00	Book
	Joe Bloggs	Today		£0.00	£30.00	£0.00	£30.00	£30.00	Book

This displays all appointments available to that patient with availability and pricing information. You can book an appointment from this screen by clicking **Book**. This displays the search engine where the appointment type is pre-populated.

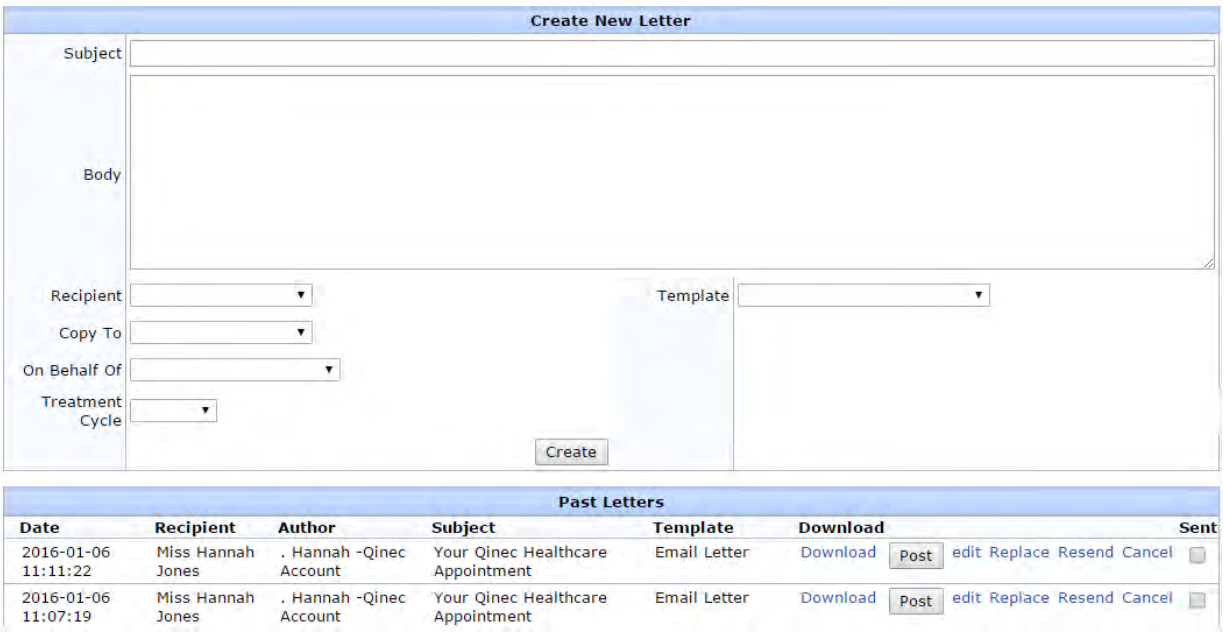
The **Available From** date takes into account the contract start date as well as just the patient's eligibility date.

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Tasks menu options

Create a letter for a patient

To create a letter for a patient, select **Create Letter** in the patient **Tasks** menu. Choose a template that is appropriate for the letter being sent. Once the letter template has loaded the pre-populated material, add any additional information in the body of the letter. Then choose a recipient, and a treatment cycle if necessary. It is also possible to send the letter on behalf of someone else. If this is not the case, then the details of the authoring practitioner are added to the letter. To create the letter, click **Create**.



To view a created letter, click **RTF** or **Download**, depending on your configuration, and Conductor downloads the letter plus any attached documents as RTF files.

To edit a past letter, select **Edit**. All changes to the letter are stored and a complete audit trail of all edits is visible to anyone editing the letters.

To replace a letter in Conductor with another letter saved to a personal computer, click **Replace** and upload the replacement letter.

To resend a letter that has previously been attached to an email, click **Resend**.

To delete a letter, click **Cancel**.

It is possible to mark whether a letter has been printed or sent by selecting the appropriate boxes.

View patient documents

You can view a list of all documents linked to a patient by selecting **Document List** in the patient **Tasks** menu. You can also print documents from here.

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Patient exercise programmes

If exercises are included in your configuration, you can create unique exercise programmes for each patient.

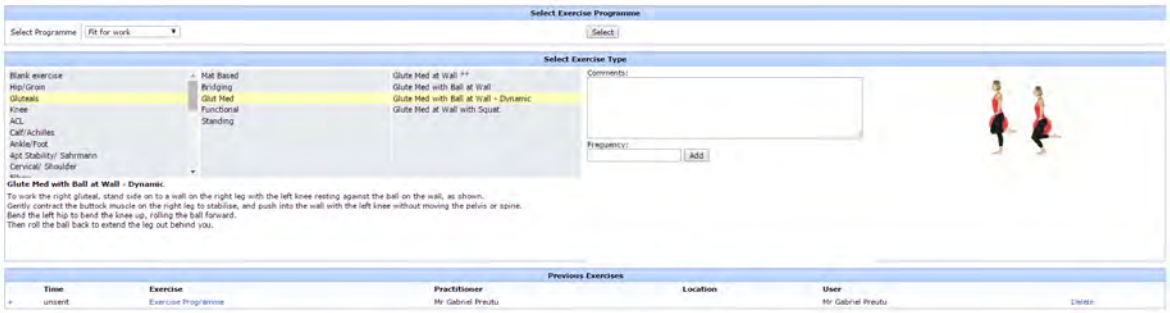
You can assign an existing exercise programme to a patient or you can create a new exercise programme from existing exercises. You can also add individual exercises to an existing exercise programme.

To view the exercise page for a patient, select **Exercise Programme** in the patient's **Tasks** menu.

Assign an existing exercise programme

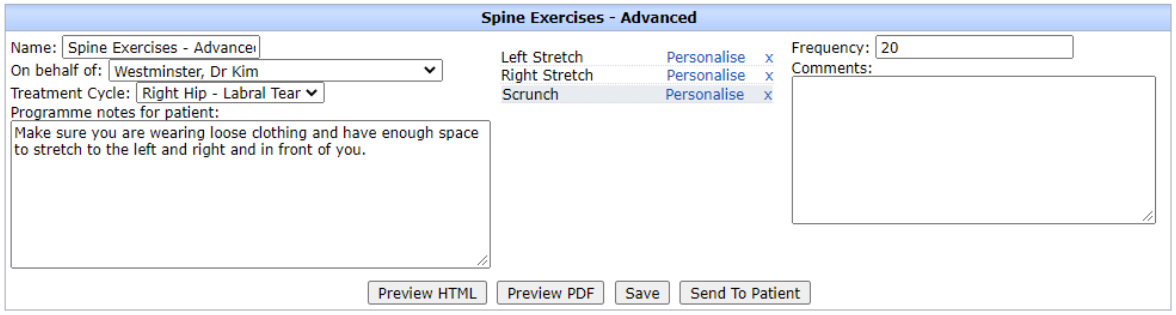
To assign an existing exercise programme to a patient:

1. Select the exercise programme required from the drop-down list and click **Select**. The details of the exercise programme appear in the section below. It also appears in the list of **Previous Exercises**.



2. You can also add individual exercises to the programme.

3. In the section below, enter the practitioner that you have assigned the exercise programme on behalf of.



4. Select the treatment cycle from the drop-down list and enter programme details for the patient, if required.

5. Enter programme notes for the patient and comments, if required.

6. You can delete individual exercises from the programme, if necessary. You can also personalize an individual exercise by changing its name, the steps, or the frequency.

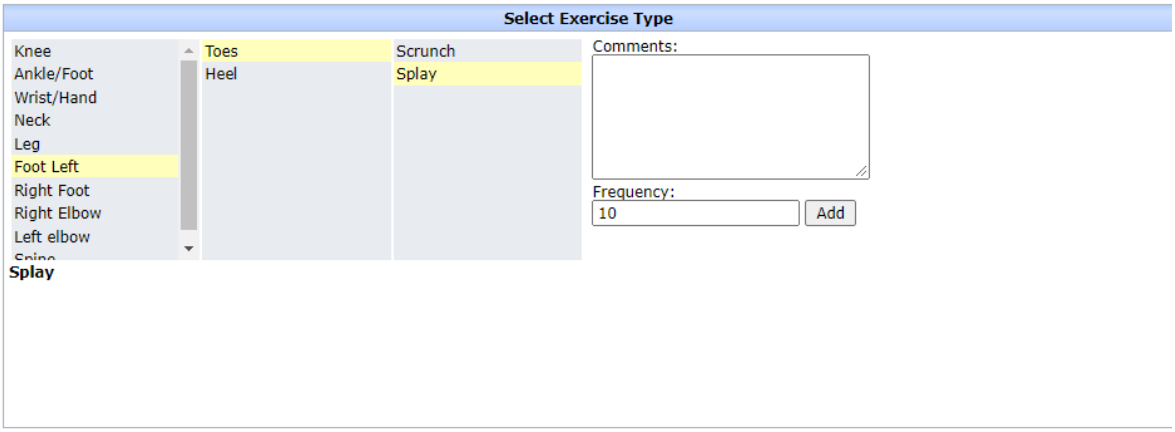
7. Click **Save**.

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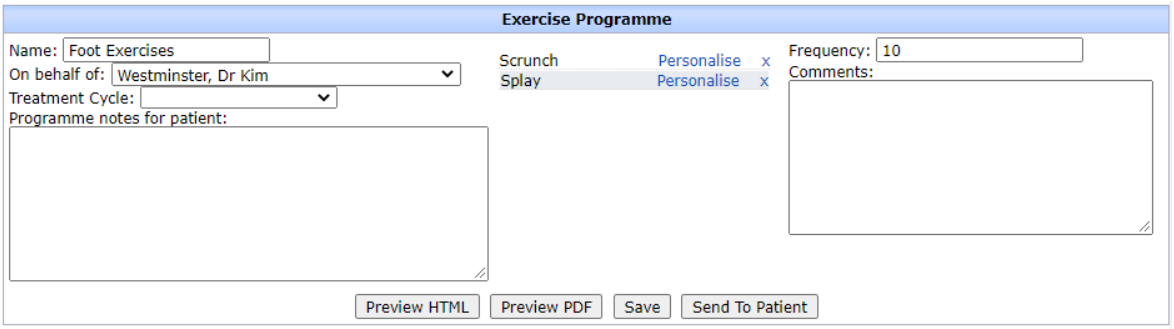
Create a new exercise programme

To create a new exercise programme for a patient or add more exercises to an existing programme:

1. In the **Select Exercise Type** section, select the part of the body, exercise type, and exercise sub-type.



2. Enter comments, if required, and a frequency.
3. Click **Add**.
4. Continue to add all the exercises you need in this programme.
5. In the section below, enter a name for the exercise programme.



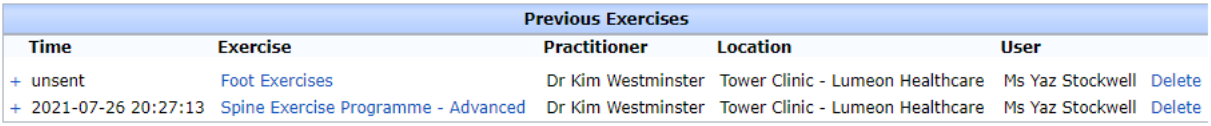
6. Enter the practitioner that you have assigned the exercise programme on behalf of.
7. Select the treatment cycle from the drop-down list and enter programme details for the patient, if required.
8. Enter programme notes for the patient and comments, if required.
9. You can personalize an individual exercise by changing its name, the steps, or the frequency.
10. Click **Save**.

Other options

You can view the exercise programme in either HTML or PDF format.

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To email the exercise programme to the patient, click **Send To Patient**. This adds the date and time that the email is sent to the exercise in the list.



Previous Exercises					
Time	Exercise	Practitioner	Location	User	
+ unsent	Foot Exercises	Dr Kim Westminster	Tower Clinic - Lumeon Healthcare	Ms Yaz Stockwell	Delete
+ 2021-07-26 20:27:13	Spine Exercise Programme - Advanced	Dr Kim Westminster	Tower Clinic - Lumeon Healthcare	Ms Yaz Stockwell	Delete

To view an existing exercise programme, click on the exercise name in the **Previous Exercises** list. You can also click **Delete** to remove an existing exercise programme for this patient.

Upload a patient photo

To upload a patient photo, click on **Upload Photo** in the patient **Tasks** box. Choose the photo you want to upload and click **Upload**.

Print patient labels

To print patient labels, select **Print Labels** in the patient **Tasks** menu. This download labels with a patient's details as a word processing file.

Other patient management options

Check duplicate patient records

To check and merge duplicate patient records, select **Check Duplicates** in the patient **Tasks** menu. If one of the accounts displayed needs merging with the current patient account, click **Merge**. This displays any fields that differ. Select which fields are correct and click **OK**.

Feedback forms

Feedback forms can be automatically sent out once an appointment has taken place. Select **L** in the diary once the appointment has finished to trigger the email.

You can fill in a feedback form that is not linked to a specific patient. The data is recorded in the same way as an anonymous feedback form. To fill in a form in this way, click **Patient Feedback** in the **Data Import Tools** menu.

Link lab results

To find lab results that have not been automatically linked to a patient, select **Lab Results Linking** in the **Communication** menu. From here you can manually link them to the patient.

Verify a prescription

You can check that the prescription ID found on a prescription is valid using the **Verify Prescription** option in the **Products** menu.

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Practitioners and external practitioners

You can set up new practitioners, external practitioners, and external practices.

Practitioners

To create a new practitioner:

1. Select **Practitioners** in the **People** menu. The **Practitioner Management** page displays. A table of existing practitioners appears on the left. The **Create New Practitioner** form appears on the right.
2. Enter the practitioner's details using the table of fields *below (page 46)*.
3. Click **Create**.

You can display or edit the details of a practitioner by selecting it in the table of **Practitioners** on the left.

You can click **Cancel** to remove a practitioner. If you do this, you can no longer see them in the table but they have not been deleted from Conductor. If you need to reinstate a cancelled practitioner, contact Lumeon Support.

Practitioner fields

Use the following table to complete the practitioner's details. Fields with an asterisk (*) are mandatory.

Field	Description
Title*, Forename*, Surname*, Sex*, Date of Birth, Post Code*, Address, Town, County, Country	Enter the practitioner's personal details.
Daytime Tel, Evening Tel, Mobile Tel	Enter at least one telephone number or select the **No telephone** checkbox.
Email*	Enter an email address or select the **No email** checkbox.
Communication preferences	Use the up and down arrows to set the practitioner's preference of communication methods. You can disable communication methods that the practitioner does not want to use. Communication schemes must be enabled for this to display.
Allow access to the system	Select this checkbox to allow the practitioner to log in. If you have entered an email address, an email is sent with their login details.
Email user when tasks are assigned to them	Select this checkbox to send emails to the practitioner when they are assigned a system- or user-generated task.
Custom admin access	Select this checkbox to give the practitioner custom administrator access.
Director access	Select this checkbox to give the practitioner system administrator access.
Junior director access	Select this checkbox to give the the practitioner administrator access.
Primary Location	Select a primary location to limit what is visible to the practitioner on worklists.
Available Locations	Select the locations where the practitioner is available. These locations can be reported on.
User Groups	Select user groups that the practitioner belongs to. User groups can be used in notification groups and in user group questions on forms.

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Field	Description
Appointment Settings	Indicate which appointment settings the practitioner can offer appointments, for example, Telehealth, Clinic, Patient's Home.
Job Title	Enter the practitioner's job title. This is shown on letters and clinical reports.
Qualifications	Free text field for entry of the practitioner's qualifications.
CSP No	Enter the practitioner's Chartered Society of Physiotherapy number.
HPC/HCPC No	Enter the practitioner's Health & Care Professions Council number.
GMC No	Enter the practitioner's General Medical Council number. You must enter this if the practitioner is to have access to a **Prescription** page on the EMR.
SDS Consultant Code	For use with HSCIS.
Lab Code	Enter the laboratory code.
Video URL	Enter the practitioner's video URL.
Signoff	Enter the signoff you want to appear in letters if the `<<signoff>>` merge field is used.
Notes	These notes appear when the cursor hovers over a practitioner 's name on their diary.
Custom gender	State whether the the practitioner will see male or female patients or **All**. This will only allow bookings to be made against the practitioner by patients who fall into the gender(s) specified. The field defaults to **All**. When searching for an appointment for a patient, if the patient is not the gender that the practitioner treats, the practitioner does not show in search results.
Treatment Age	Enter the age range of patients that the practitioner will treat. This only applies when booking appointments through the search engine.
Colour	Enter the colour of the diary slots on the practitioner's diary. Use an html code without the #.
Diary Shortcut Key	Enter the shortcut key that takes you quickly to that practitioner's diary in diary mode. Use left Alt+shortcut key in diary view.
Make diaries public	Enables this practitioner's diaries to be viewable to other practitioners.
Can view others' public diaries	Enables the practitioner to view other public practitioners' diaries.
Can view other practitioners' patients	Enables the practitioner to search for other practitioners' patients.
Can view other practitioners' journal entries	Enables the practitioner to view other practitioners' journal when in practitioner view.
Enable EMR	Displays EMR in the practitioner view – viewable pages are defined by a practitioner's specialties.
Enable Rss Feed and Password	Enables you to show calendars in Outlook or on an iPhone. If you select this, enter the RSS password.
Abbreviation	When shortcode diary mode is enabled, this code displays the practitioner's diary.
Employment Status	Select the practitioner's employment status from the drop-down list, such as contractor or agency. This data can be used for reporting. You can create statuses by selecting **Employment Statuses** in the **Runtime Options** menu.
Specialties	Select the specialties for this practitioner from the drop-down list. This defines which appointment types they are able to have booked in their diary. You can select multiple specialties by holding down the **Ctrl** key and clicking on the required specialties.
Assistant	Select an assistant for this practitioner from the drop-down list. On login, the assistant can see the practitioner's diary and patients.
Pathway rule	If pathways are configured, a practitioner can have a pathway rule associated with them. Based on the criteria in the rule the practitioner may or may not be selectable from the drop-down list when booking an appointment.
ID Domain and PACS ID	Select ID domain from the drop-down list and enter PACS ID (diagnostics only).
Practitioner Attributes	
Single Sign On User	Select to configure the practitioner to use single sign on.

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External practitioners

External practitioners are practitioners who are not employed by your organization but who may be referrers or have patients referred onto them.

A security point controls whether users can add new external practitioners in the **External Practitioners** page. If you cannot add new external practitioners and need to do so, speak to a system administrator or contact Lumeon Support.

To add an external practitioner:

1. Select **External Practitioners** in the **People** menu.
2. Complete the external practitioner's details in the **Create New External Practitioner** form using the table of fields *below (page 48)*.
3. Click **Create**.

You can associate multiple email addresses to an external practitioner.

To search for an external practitioner, use **External Practitioner Search**. Select the type of practitioner from the drop-down list, start entering their surname and click **Search**. Selecting a practitioner displays their personal and referral details.

External practitioner details

Use the following table to complete the external practitioner's details. The majority of fields are similar to those included when setting up a new practitioner - see *Practitioner fields (page 46)*. Additional fields include:

Field name	Description
Search External Practice	This field works on autocomplete and displays any external practices that have been entered.
NHS Number	Enter the National Health Service number.
RIS Identifier	Enter the Radiology Information System identifier. When entering a value into this field, Conductor checks to ensure that the identifier has not already been assigned to another external practitioner.
GP Code	You can change this field, if required. Conductor performs a uniqueness check when you save the page.
Registration ID	A uniqueness check will be performed on the ID when the page is saved.
List Size	Enter the number of patients.
Type	Select their specialty from the drop-down menu.
Preferred Reviewer	Select from the drop-down menu. To set up reviewers, select **Reviewers** in the **People** menu.
Practice Manager	Select this checkbox if the external practitioner is the practice manager.
Patient Search	Option to either search for their patients only or for feature to be disabled.
ID Domain and PACS ID	Select ID domain from drop-down list and enter PACS ID (diagnostics only).
Auto-post communications, where possible	Integrates with third party mailing systems such as ***DocMail***.

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External practices

To add an external practice:

1. Select **External Practices** in the **People** menu.
2. Fill in the details in the **Add External Practice** section on the right.
3. Click **Add**.

You can enter the details of companies to allow the practice to charge a company for the treatment of any corporate patients associated with it.

To search for the details of an external practice, start entering the name of the practice into **Search External Practices**. Conductor works on an auto-complete system; entering part of the name displays corresponding search results. When you select an external practice, you can view and add to the practice log.

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Companies and insurance companies

Companies

You can enter the details of companies. This enables your organization to charge a company for the treatment of any corporate patients associated with it. You can also link the company to a contract. The contract is used to generate charges which are then raised against the company.

Add a company

To create a new company and add its details:

1. Select **Companies** in the **People** menu.
2. Start entering the name of the company that you want to add and a **New** drop-down appears. Click this to display the company details form.
3. Complete the company details using the table below.
4. When finished, click **Update Details**.
5. You can then add further information about the company using the **Company** menu. See *Company menu options (page 52)*.

Complete the company's details using the following table:

Field name	Description
Company Name	Name of company.
Reference	Links with a company contact also using that reference.
Sector	Create sectors in **Company Sectors** in the **Company Options** menu.
Subsidiaries/ Divisions	Enter details of subsidiaries/divisions
Sales Channel	Select from drop-down (this is a core configuration setting)
Company	This allows the user to select a parent company (autocomplete field). Prices will be based on the parent company's charges.
Issues own invoices	Not selecting this checkbox will mean that any charges to the child company will be raised in an invoice to a parent company.
Invoicing	Choose from **On Account** (this will provide a rolled up bill depending on a set frequency) or **Day of Visit** (this will provide a one-off bill on the day of the patient's visit). If Day of Visit is selected, an additional checkbox will be displayed, which allows the user to select if the invoice should be displayed against the patient account or not.
Online Booking Comment	Will appear in the patient portal when a patient chooses to make a booking through their company scheme.
Invoice Reference	Use the merge tag **<<invoice_reference>>** to display this reference on invoices.
Sage Reference	Use the merge tag **<<sage_reference>>** to display this reference on invoices.
VAT Registration Number	Use the merge tag **<<vat_registration_number>>** to display this reference on invoices.
Purchase Order No	Use the merge tag **<<purchase_order_no>>** to display this reference on invoices.

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Field name	Description
Invoice Detail	Choose between the following: · **None** – Does not show any patient information on invoice. · **Patient Names** – Displays all tags used between the `<<begin_patient>>` and `<<end_patient>>` merge tags. See ***Letter & Email Templates in Conductor*** for more information. · **Patient Details** - Displays all tags used between the `<<begin_detail>>` and `<<begin_detail>>` merge tags. See ***Letter & Email Templates in Conductor*** for more information.
Payment Terms	Used to set up invoice due dates.
Email Address Template	Enter a default email address template, such as `forename.surname@company.com`. This automatically populates the email address based on the patient's name in the **Add Employee** form. The current set of available symbols for replacement is as follows: · `#{Forename}` - Employee's first name as entered. · `#{ForenameLower}` - Employee's first name in lower case. · `#{ForenameInitial}` - First character of employee's first name as entered. · `#{ForenameInitialLower}` - First character of employee's first name in lower case. · `#{ForenameInitials}` - First character of each name in employee's first name as entered. · `#{ForenameInitialsLower}` - First character of each name in employee's first name in lower case. · `#{Surname}` - Employee's last name as entered. · `#{SurnameLower}` - Employee's last name in lower case. · `#{SurnameInitial}` - First character of employee's last name as entered. · `#{SurnameInitialLower}` - First character of employee's last name in lower case. Examples for John Edward Smith: `#{Surname}.#{ForenameInitial}@lumeon.com` generates **Smith.J@lumeon.com**. `#{ForenameLower}.#{SurnameLower}@lumeon.com` generates j**ohn.smith@Lumeon.com.** `#{ForenameInitialsLower}#{SurnameInitialLower}@lumeon.com` generates j**es@lumeon.co.uk.**
RIS Identifier	Match to the PACS.
Logo	Choose a file and upload to link a logo to a company. This logo appears on appointment letters when the merge tags `<<start_charge_to_logo>>` and `<<end_charge_to_logo>>` are used and the payor for that appointment is a company.
Login Email	Enter the email address of the user who will be accessing the company portal.
Company Notes	Any text entered in this field will display when hovering over the company name in the list of companies.
Patient Instructions	Use the merge tag `<<patient_instructions>>` in the appointment letter to display any content entered in this field.
Allow access to the system	Will send an email containing login details for the company portal to the email address supplied.
Lay report required	Tick if lay reports are required for patients.
Medical report required	Tick if medical reports are required for patients.
Pause Recall	For customers using recall. Selecting this checkbox will put a company in recall pause state; patients from that company will not be contacted unless the checkbox is unselected.
Qualifies for Zero VAT	Any products that ordinarily include VAT will be exempt.

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Field name	Description
Removal Enabled	Users at particular levels can remove employees. The level must be configured in security points.
Lock Company	Selecting this checkbox prevents all users from being able to add patients to this company. To set which users can add patients to a locked company, navigate to **Security Points** in the **System Configuration** menu, search for `Company.CanAddRemoveFromLockedCompanies` and select **Can Add** for those users.
Enable patient added triggers	Clear this checkbox to prevent an activity being created if the company is added to a patient's record if a **Patient Added to Company Activity Type** is triggered.
Contract	Select which contract the company needs to be associated to. If no contract is selected, it will default to the private contract.
Start Date	Enter start date of contract.
Renewal Date	Enter renewal date of contract.
Reminder Date	Enter reminder date of contract. This is a mandatory field.
Expiry Date	Enter the expiry date of contract.
Local Contact	Select a system administrator from the drop-down list.
Preferred Contact Method	Select from the drop-down list. These can be set up by clicking **Company Contact Methods** in the **Company Options** menu.
Staff Team	Select the staff team from the drop-down menu. These can be set up in **Staff Teams** in the **People** menu.
Additional Local Contacts	Select additional local contacts from the drop-down list. You can configure this in **Company Additional Local Contact** in the **System Configuration** menu.
Notes	Notes will display when hovering over the company name in the list of companies.
Allow company bookings	Allows company staff to book appointments for employees.
Allow employee bookings	Allows employees to book appointments for themselves.

If a company has a credit limit which, when exceeded, stops bookings being taken for the company, it is possible to set up a contract with no billing or products and assign it to the aforementioned company.

When entering company contact details, if no billing contact is entered, invoices are addressed to the primary contact.

It is possible to schedule a company to move onto a **Next Contract** on a particular date. Conductor automatically makes the change to the company's contract (and associated properties) on the specified date.

Company menu options

When you have entered the details of a company, you can add further information or perform additional tasks using the **Companies** menu options on the left hand side of the page. The following options are available:

Company menu option	Description
Overview	Shows a company's details, their account balance and an overview of the last events on the company log.
Company Details	General company details, contact information and contract details. You can link contracts to the company here.
Contract	Contract and products linked to the company.
Offices	Company office details. See *Company offices (page 53)*.
Contacts	Fill in company contact details – they can be associated with DICOM AEs. You can select either print or email as the company's contact communication preference, if communication schemes are enabled.
Employees	Provides an employee search. You can also enter new company employee details.

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Company menu option	Description
Import Employees	Enables importation of employees from a CSV file. There is a core configuration setting that displays a checkbox allowing imports to be done offline.
Company Import Patient	Enables new patients to be added to a company, and if a patient is already in the system but associated with another company, they are additionally linked to the new company. This is only available if the core configuration **Additional Companies** is enabled.
Reports	Enables you to generate standard reports and company-specific reports.
Charges	Displays company charges and enables you to prepare invoices.
Invoices & Payments	Displays outstanding and paid invoices. Payments can be taken and allocated to invoices.
Company Log	Shows a list, in date order, of all activity that has taken place on that company's account. Each entry shows the date and time of the activity and which user it was performed by.
Paper Archive	Scan and upload documents such as letters and reports.
Employee Eligibility Levels	Enables you to restrict the services that are available to patients depending on their position within the company. See *Company employee eligibility levels (page 53)*.
Recall Strings	Where employee recall strings can be configured.
Frequency	Determine the frequencies between recalls.
Booking Questions	View and add questions to be asked at appointment bookings. See *Company booking questions (page 54)*.

Company offices

Click **Offices**, in order to add offices to the company. You can assign a separate purchase order (PO) number for each company office.

Field Name	Notes
Name	Name of office.
Reference	Office reference.
Office PO	Purchase order (PO) number for this company's office. CPM uses this number when it creates a purchase order for a patient who is an employee in this office.
Head office	Select this if this is the head office of the company.
Post Code	Enter the office postcode.
Address	Enter the office address.
Town	Enter the town where the office is situated.
County	Enter the county where the office is situated.
Country	Select the country where the office is situated.

Company employee eligibility levels

Company employee eligibility levels enable you to restrict the services that are available to patients depending on their position within the company. For example, a company might only offer a particular appointment type to employees of associate level and above.

To add employee eligibility levels:

1. After searching for the company, select **Employee Eligibility Levels** in the **Companies** menu.

2. You can view and delete existing eligibility levels or add new ones using the form on the right of the screen. Selecting the **Lock** checkbox means that only users with particular permissions can add patients to this eligibility level.

Once you have defined the eligibility levels for a company, specify which eligibility level applies to new or existing patients of that company by using the **Level in Company** drop-down box in **Patient Details**. When entering pricing eligibility and cancellation policies for a contract, a table of all company eligibility levels defined for that contract are displayed.

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Company booking questions

You can create appointment booking questions that must be answered before the appointment is booked. Questions are tied to a company and a validation rule is set meaning that Conductor can check that the response given fits the form required. If the validation passes, the information is stored against the appointment and can be used on the invoice using the appropriate merge field.

To create company reference questions:

1. Select **Company Reference Questions** in the **Communication** menu.
2. Enter the question text and click **Create**.

To allocate a company reference question to a particular company:

1. Select **Companies** in the **People** menu.
2. Select the company that the questions are to be associated with and select **Booking Questions** in the **Companies** menu.
3. Select the question from the drop-down list. Enter a **Validation message** and a **Validation rule**.
4. Click **Create**.

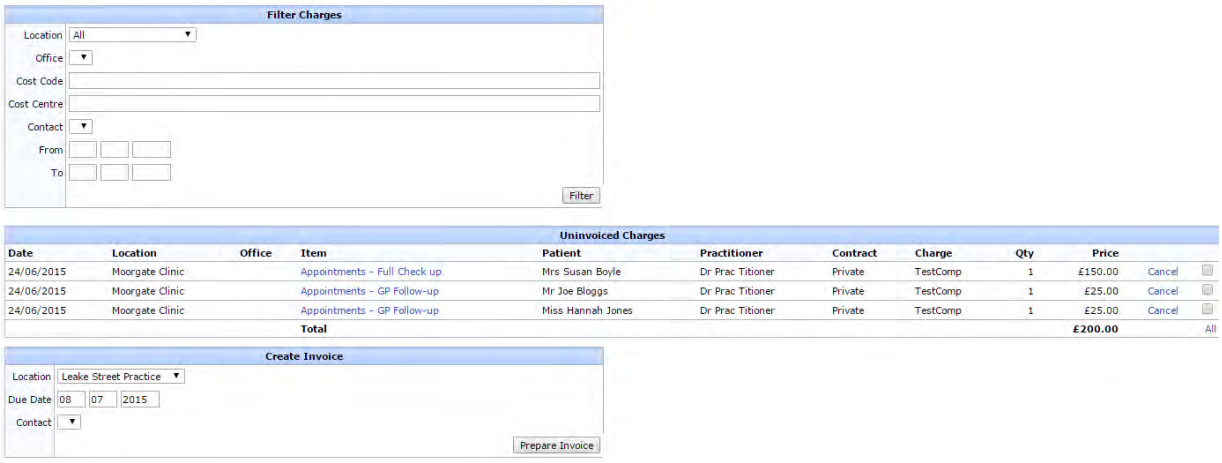
Create parent hierarchies

You can set up companies that are parents of other companies. Go to the company details of the child company and use the auto-complete **Company** field to enter the name of the company that is to be the parent company. Not selecting **Issues own invoices** means that any charges to the child company are raised in an invoice to the parent company.

Create an invoice for a company

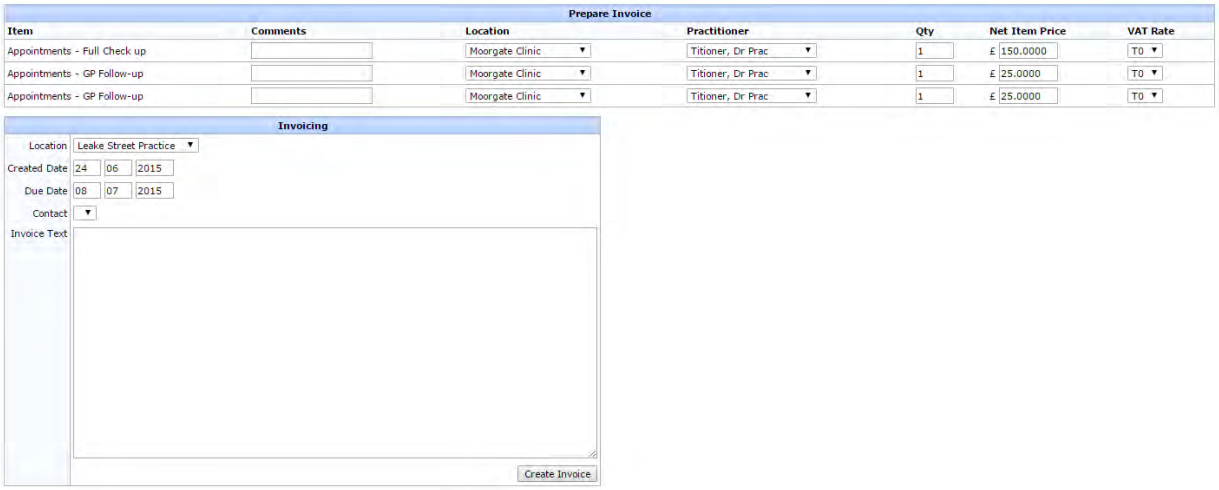
Consolidated invoices can be created for corporate clients so they can receive all employees' charges for the month on one invoice.

If an appointment has been charged to a company, the charge appears in the **Charges** page of the company account. Select the charges that require invoicing and click **Prepare Invoice**.



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Confirm the invoice details and click **Create Invoice**.



Click on **Invoices & Payments** to take payment from the company and allocate it to the invoice.

You may need to link patients to insurance companies to ensure that invoices are sent to the correct payee.

Fill in the details of the insurance company in the **Create New Insurance Company** box on the right, ensuring that the required contract is selected. Click **Create.** Clicking on the name of created insurance companies in the **Insurance Companies** box on the left displays company details, which you can then edit. Clicking on the appropriate link shows charges and invoices linked to the insurance company and the option of deleting the insurance company. You can also link questions to an insurance company which are generated when an appointment is booked.

Insurance companies

You may need to link patients to insurance companies to ensure that invoices are sent to the correct payee.

Add an insurance company

To add an insurance company:

1. Select **Insurance Companies** in the **People** menu.
2. Fill in the details of the insurance company in the **Create New Insurance Company** section on the right, ensuring that you select the required contract.
3. Click **Create**.

You can upload a logo for the insurance company. This logo appears on appointment letters when the merge tags `<<start_charge_to_logo>>` and `<<end_charge_to_logo>>` are used and the payor for that appointment is that particular insurance company.

Select the name of the insurance company in the table of **Insurance Companies** on the left to display the insurance company's details, which you can then edit. Clicking on the appropriate link also shows charges and invoices linked to the insurance company and the

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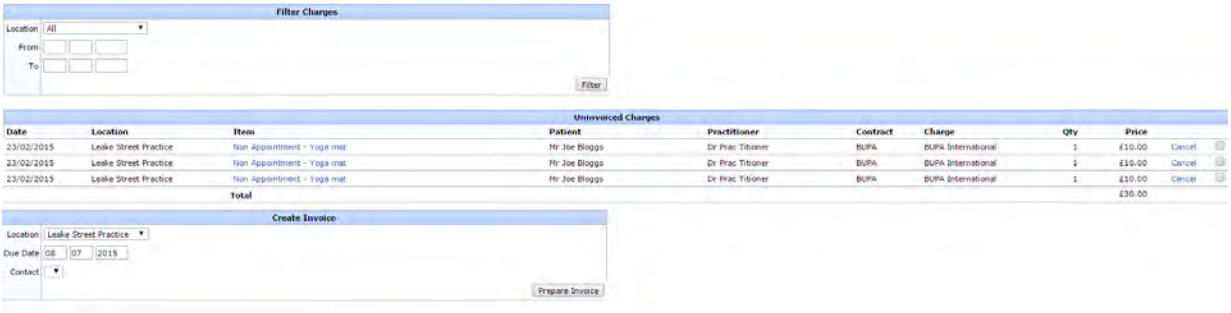
option of deleting the insurance company. It is also possible to link questions to an insurance company which are generated when an appointment is booked.

Create an invoice for an insurance company

You can create consolidated invoices for insurance companies so that they can receive all patient charges for the month in one invoice.

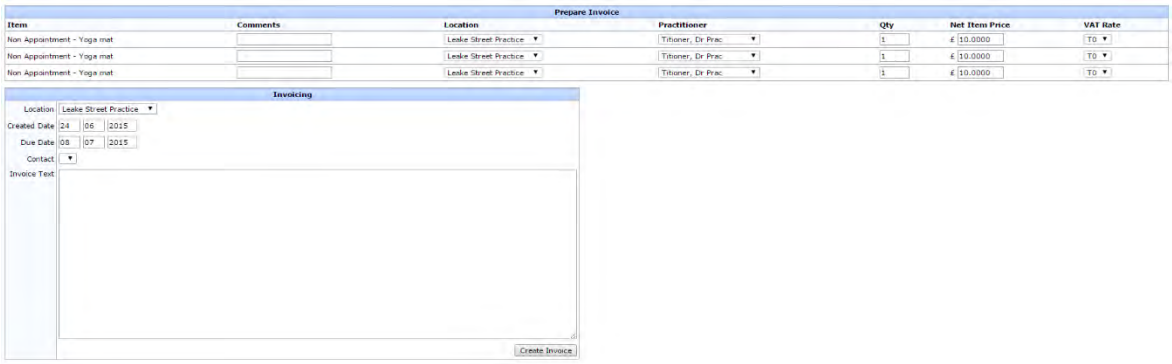


If an appointment has been charged to an insurance company, the charge appears in the **Charges** page of the insurance company account.



To create an invoice for an insurance company:

1. Select the charges that require invoicing and click **Prepare Invoice**.
2. Confirm the invoice details and click **Create Invoice**.



3. Click **Invoices** to take payment from the insurance company and allocate it to the invoice.

Company changes

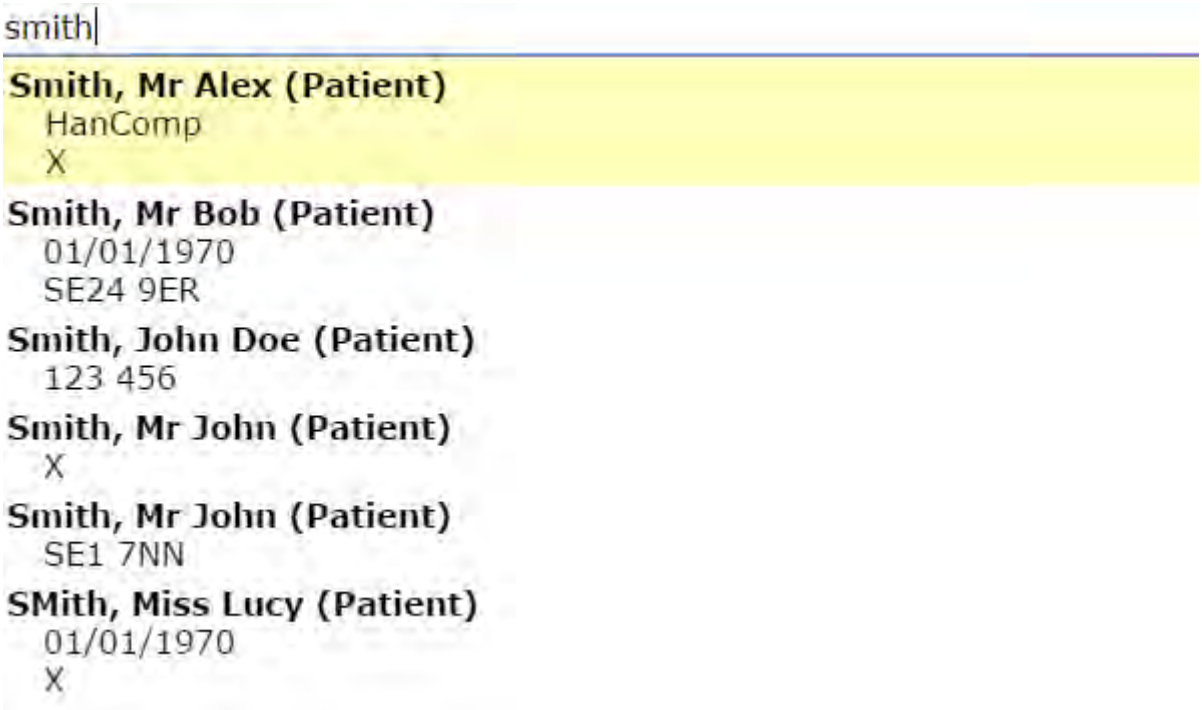
You can view which new companies or insurance companies have been added or changed in Conductor within a particular time range. To do this:

1. Select **Product Changes** in the **Products** menu.
2. Select the type from the drop-down list and enter a date range.
3. Click **Search**.

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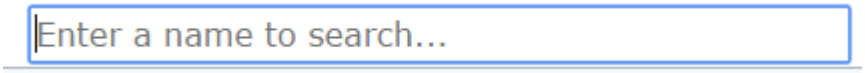
Global search bar

The global search bar appears on the right-hand side at the top of the screen. From every screen in Conductor, you can search for all users in Conductor quickly and easily. To search, use the form surname, forename. You can enter the name in sections, for example, typing Jon, Kev would return the individual Kevin Jones. You can also search for user IDs. If the ID is only 2 digits place a 0 before them.

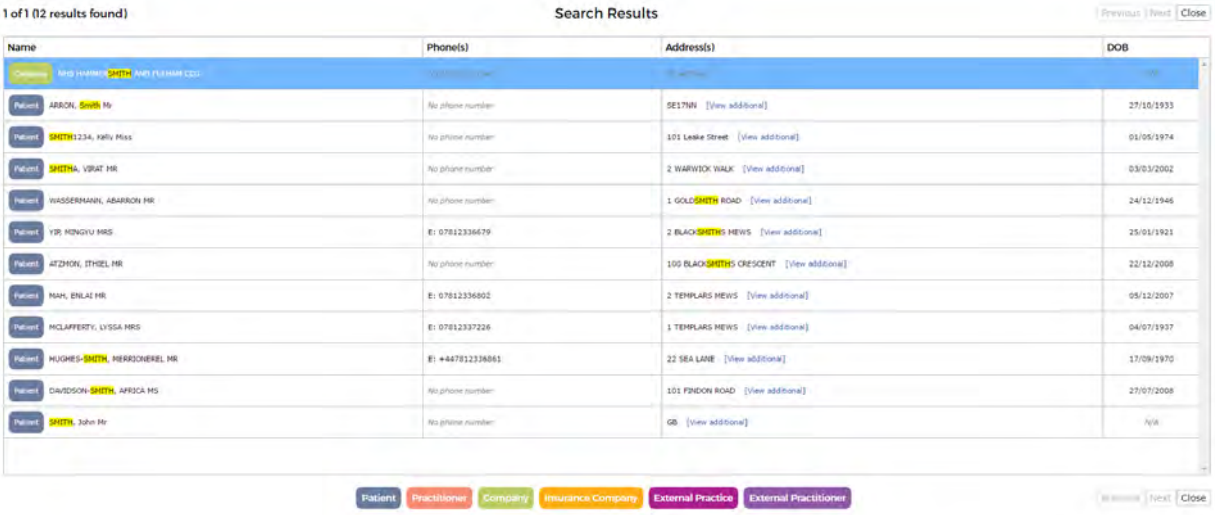


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In addition to being able to search by name and ID, you can also search by address details and date of birth.



You can use coloured labels to filter results by user type, such as patient, practitioner, company, or insurance company. The search results display the user's phone number, address, and date of birth.



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Worklists

Worklists are pages that display patients in different states. Your organization's worklists are set up according to your requirements. An example worklist is shown below:



Each worklist page shows a list of patients and the options to action particular tasks, such as opening a referral form or booking an appointment.

Select the patient's name, appointment or specialty to display more details about the patient, referral, or appointment.

Click the **+** icon on the left of a patient's record to expand to show all activity on the patient's account.

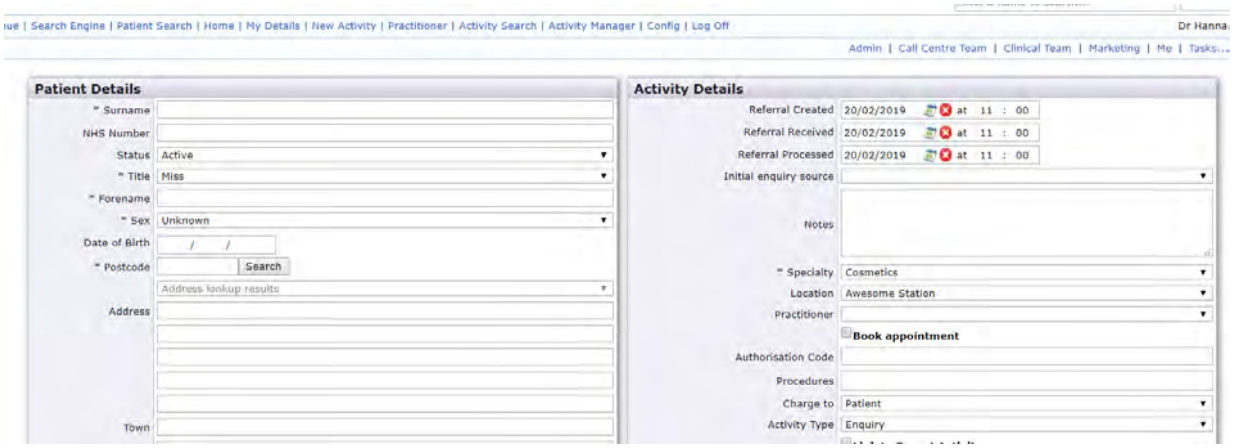
Click **Download** on a worklist to download the worklist page as a CSV file.

You can filter worklist pages to show a particular location or all locations.

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New activity

You can create new enquiries or referrals by selecting **New Activity** in the top menu bar.



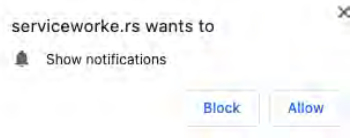
Once you have created an activity, you can manage it from the patient's account by selecting **Activities** in the **Patient** menu.

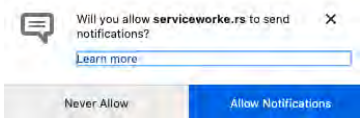
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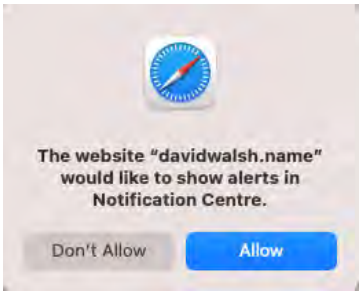
Notifications

Notifications enable you to receive alerts telling you that an action needs to be performed in Conductor. This is useful if you have Conductor running but the browser or tab is minimized. For example, if your organization has a pathway where patients send an SMS to say they have arrived for their appointment, the pathway can send a notification to alert appropriate users who need to respond to the patients.

When you first log into Conductor after push notifications have been enabled, Conductor sends you a message asking for permission to send notifications. The format of this message depends on the browser you use. For example:







If you click **Allow**, you will receive notifications from Conductor according to the logic in the pathways. If you click **Block** or **Don't Allow**, you will not receive notifications from Conductor. If you accidentally block notifications, search for instructions on how to allow them on your browser. Alternatively, contact your system administrator or Lumeon Support.

Available browsers

Conductor can send notifications on the following browsers:

- Windows computers:
  - Chrome
  - Edge
  - Firefox
- MacOS computers:
  - Chrome
  - Firefox

Notifications are not available on:

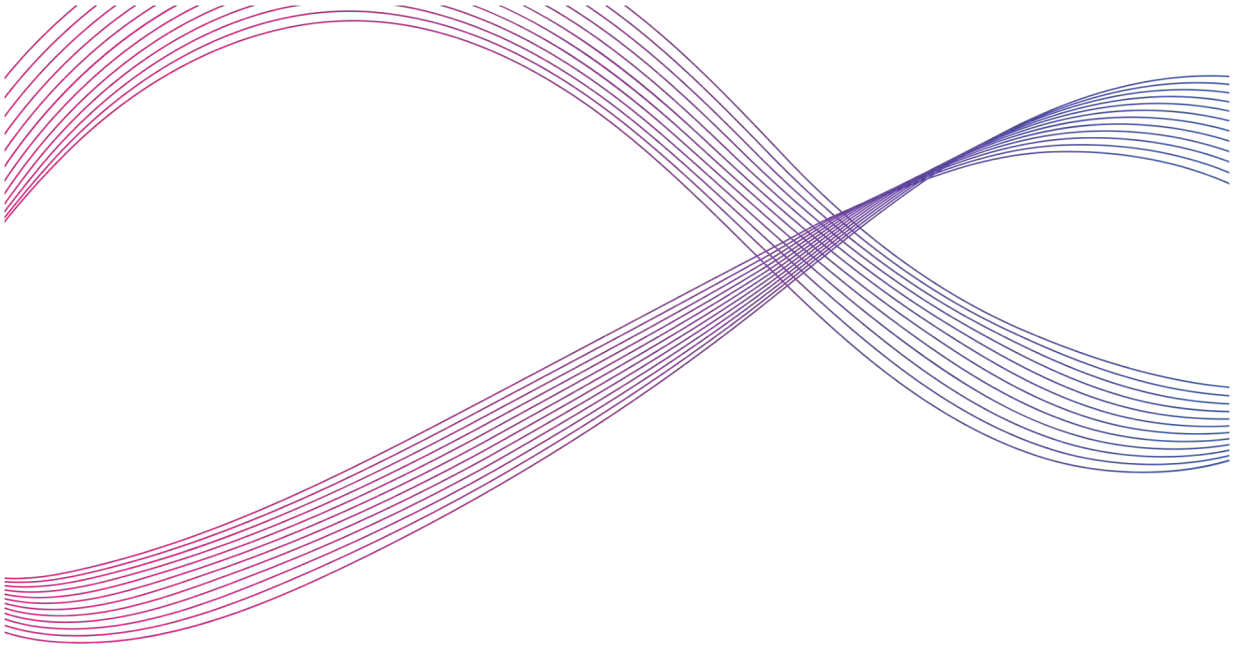
- Internet Explorer
- Safari
- Any mobile phone browsers.

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Glossary

DocMail	A facility for printing and posting letters. Conductor can be integrated to DocMail for sending letters to patients. See *https://www.docmail.co.uk/* for more information.

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Lumeon Conductor for Practitioners 24.2

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Introduction

Lumeon Conductor is a single web-based solution for patient management and administration. It combines the key components of resourcing, scheduling, billing, care planning, and Electronic Medical Records (EMR) on a single platform.

Purpose

This guide helps practitioners understand how to make the most of Conductor, improving the efficiency of day-to-day diary, practice, and patient management. It aims to guide you through the process of booking an appointment for a patient and then tracking that appointment from patient arrival to patient departure, including the billing process and recording of patient health records.

Some features may vary depending on your configuration and product version.

Supported browsers

You can access Lumeon Conductor on many different web browsers and devices.

Conductor supports the current version, and the last three versions, of the following browsers:

- Google Chrome 81+
- Safari 11+
- Edge 81+
- Firefox 76+
- Internet Explorer 11

If you attempt to access Conductor on an unsupported browser, an **Unsupported Browser** page is displayed. This page enables users to download the latest version of their preferred browser.

Other documentation

For information on the administrator user interface, see ***Lumeon Conductor for Administrators***.

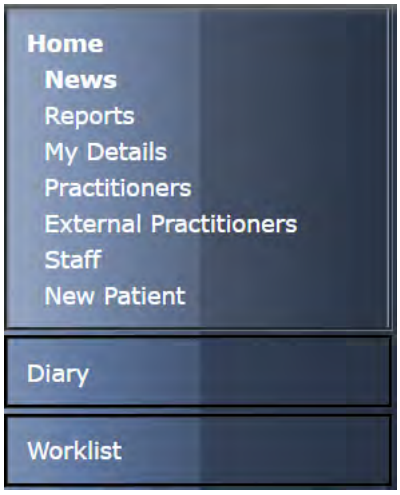
For system configuration and setup, see ***Lumeon Conductor for System Administrators***.

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Home

The practitioner login enables you to see the Conductor functionality that you need, as a practitioner. When you log in, the **Home** page is displayed.

The **Home** page displays relevant practice news, your diary, and links to worklists, if configured.



Worklists are designed to follow the trajectory of workflows and are uniquely configurable to a practice's needs.

From the menu panel on the right of the page, you can navigate through the **Home** page and the **Diary**.

You can also view a list of all patient accounts and appointments that have recently been selected.

Home menu

In the **Home** menu, several options are provided:

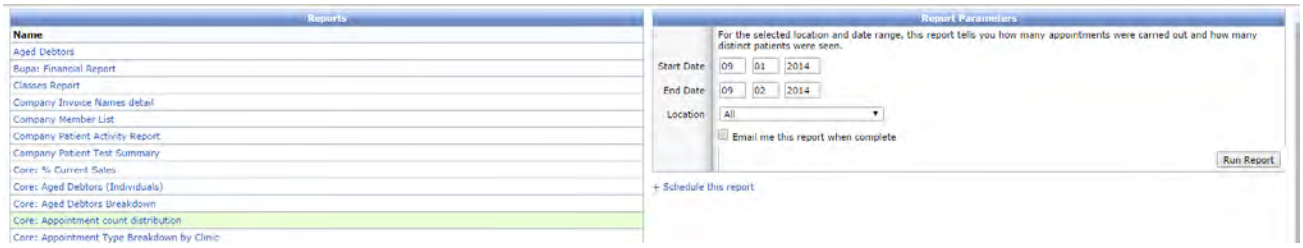
1. **News** - Displays news and information for your organization.
2. **Reports** - Run system reports. This option may not be available depending on your configuration. See *System reports (page 5)*.
3. **My Details** - View or edit your personal details. See *My details (page 5)*.
4. **Practitioners** - Displays a list of all practitioners working at the organization. Select any of the listed names to display their contact details.
5. **External Practitioners** - Search for external practitioners. Select the type of practitioner from the drop-down list and click **Search**.
6. **Staff** - Displays a list of administrative (non-clinical) staff. Select a name to display further contact details.
7. **New Patient** -Add a new patient. See *Create a new patient record (page 6)*.

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System reports

To run a system report, select **Reports** in the **Home** menu and select the required report. Fill in the start and end date and location details, and then click **Run Report**. This downloads the report as a CSV file.

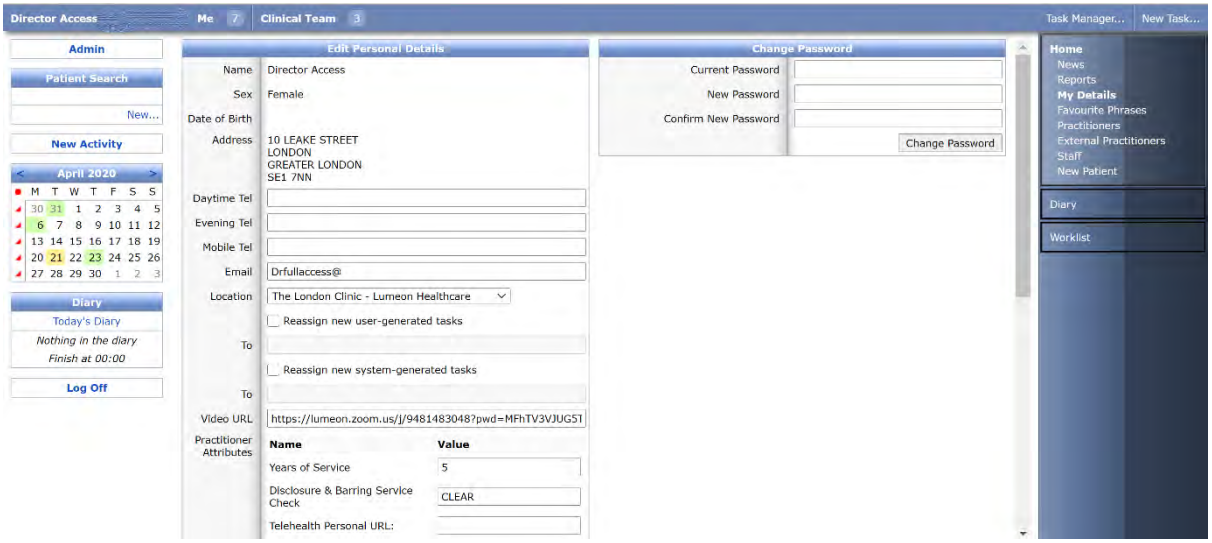
To run a report regularly, click **+Schedule this report**, fill in the required information and click **Save**.



My details

To view or edit your personal details, click **My Details** in the **Home** menu. This feature enables you to:

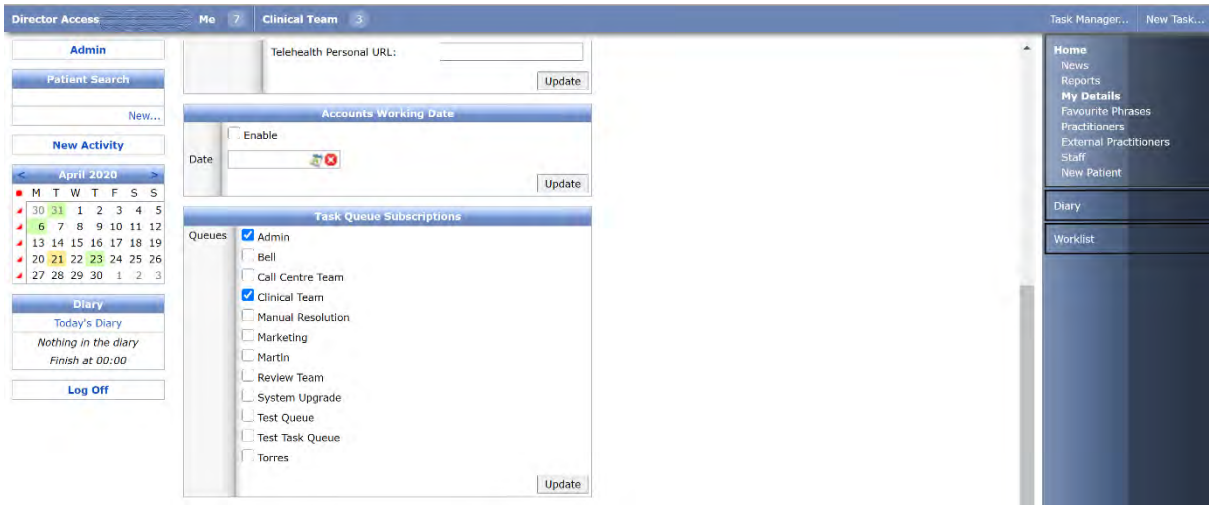
- Enable a prescription password.
- Amend your email address or telephone number.
- Reassign user or system generated tasks to other users.
- Add or remove your personal video URL used to manage telehealth appointments.



Select the **Accounts Working Date** and enter a date to populate an invoice date and payment date on the **Create Invoice** and **Take Payment** forms, respectively.

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To subscribe to receive tasks allocated to particular work streams, select the relevant check boxes in **Task Queue Subscription**.



Depending on the system configuration, options may be displayed to add a **New Patient** or to run **Reports**.

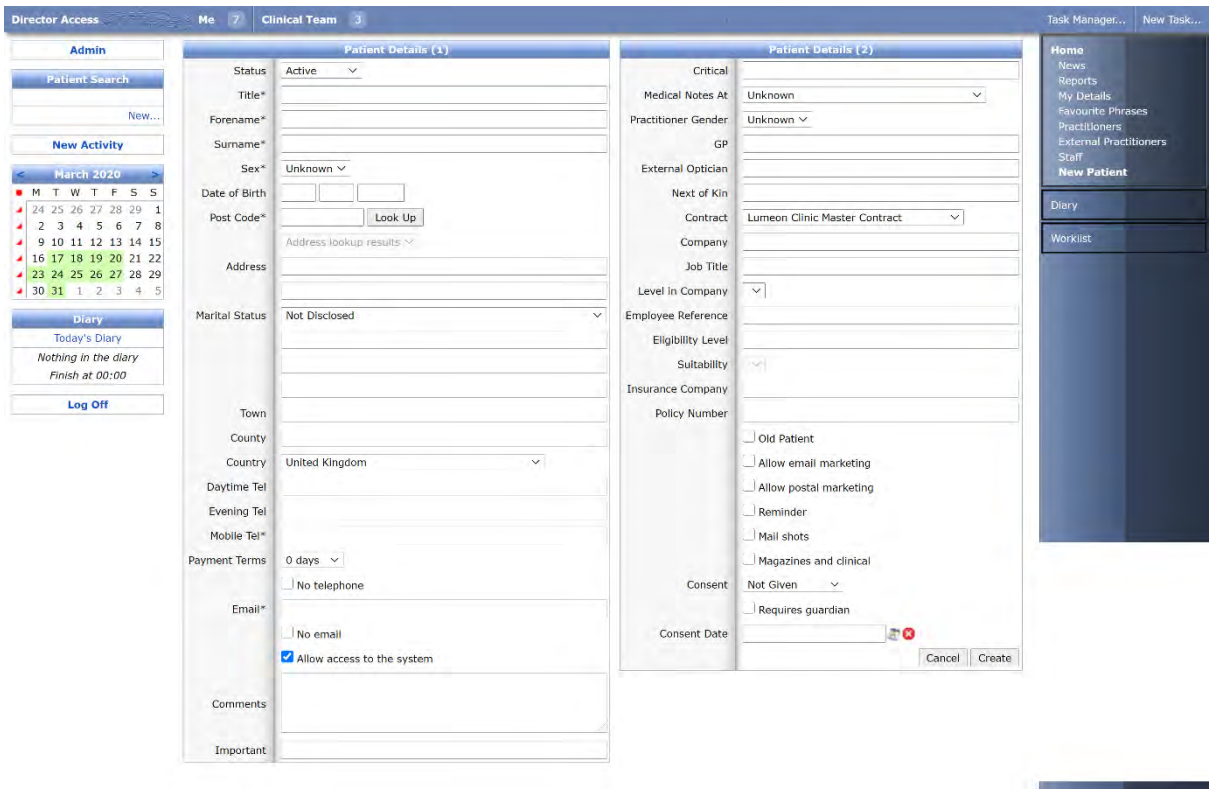
Create a new patient record

Administrators usually add new patients to Conductor, but you can add a new patient if required. There is a core configuration setting that enables practitioners to create new patients. Contact Lumeon Support if you want to enable this option.

To create a new patient, click **New Patient** in the **Home** menu or **New...** under **Patient Search**.

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Complete all mandatory fields as denoted with an asterisk *****, and any other relevant fields to capture the patient's details.



Click the **Create** button to save the new record.

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News items

If you are a practitioner with director access, you can create a new news item or a message to staff. To do this, click the **Create news item** link on the **Home** page, alternatively select the button via the **News** link. Select which location and user types are required to see the message, fill in the details and click **Create**.



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Task manager

The task manager enables you to create new tasks, assign them to yourself or others, view your tasks, or view all tasks.

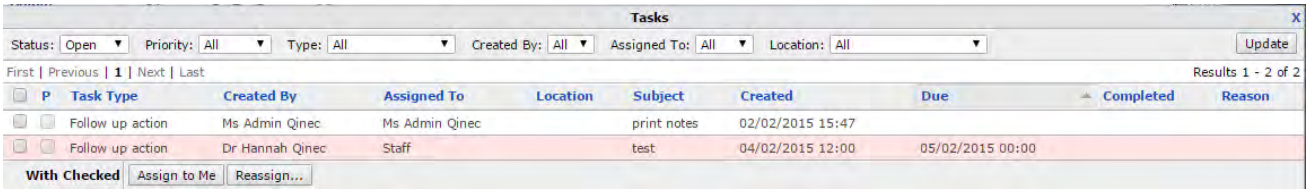
View the task manager

You can access the task manager from most pages by clicking **Tasks...** in the top right hand corner.

Use the drop-down boxes to filter which tasks are viewed and click **Update**. To reassign tasks, check those particular tasks and click **Assign to Me** or **Reassign...**. Clicking **Me** in the top right hand corner displays only tasks assigned to you.

Overdue tasks are highlighted red.

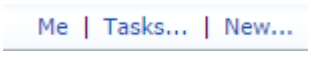
Under the **P** column, high priority tasks display a red square and low priority tasks display a blue square.



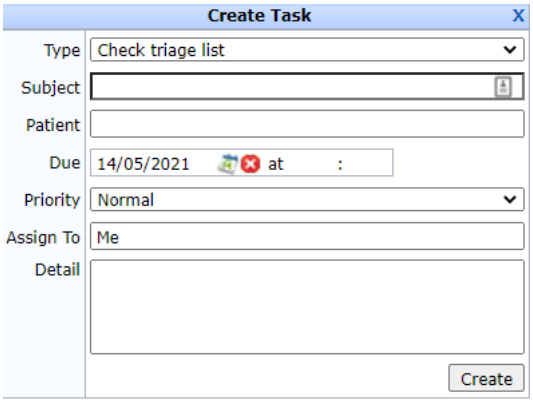
Create a new task

To create a new task:

1. Click **New...** in the top right hand corner to create new tasks and assign them to yourself or other users.



2. Complete the details of the task, using the table below, and click **Create**.



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Create task fields

Use the following fields to complete the **Create Task** page:

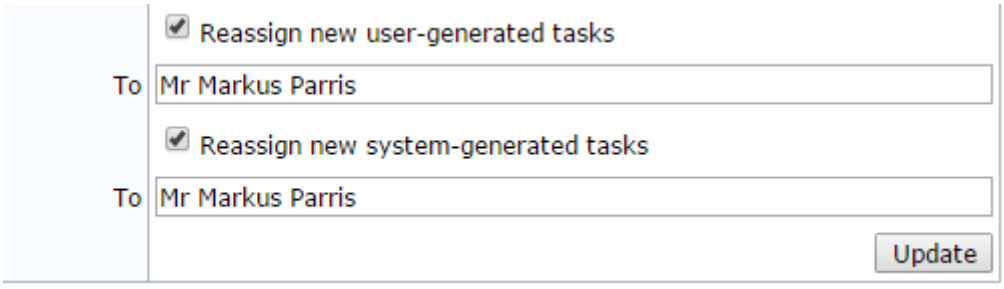
Field name	Description
Task Type	Select the type of task from the drop-down menu. You can configure task types in **Task Types** in the **System Configuration** menu.
Assign To	Choose to assign to one of the following: · **Me** – assigns the task to the logged in user. · **Another user** – start typing the user's surname and select from the displayed search results · **Task Queue** – start typing the task queue and select from the displayed search results. This will display the task to all users who are subscribed to that particular task queue and they can self-allocate themselves to complete that task. Set up task queues in **Task Types** in the **System Configuration** menu.
Subject	Type a subject for the task.
Patient	Associate the task to a patient, if required. Start typing the patient's surname and select from the displayed search results.
Due	Enter an optional due date and time.
Priority	Select low, normal or high priority.
Detail	Add more detail about the task being created.

Reassign tasks

You can reassign any user- or system-generated tasks to someone else if a practitioner is unavailable, for example, if they are on annual leave.

To reassign tasks:

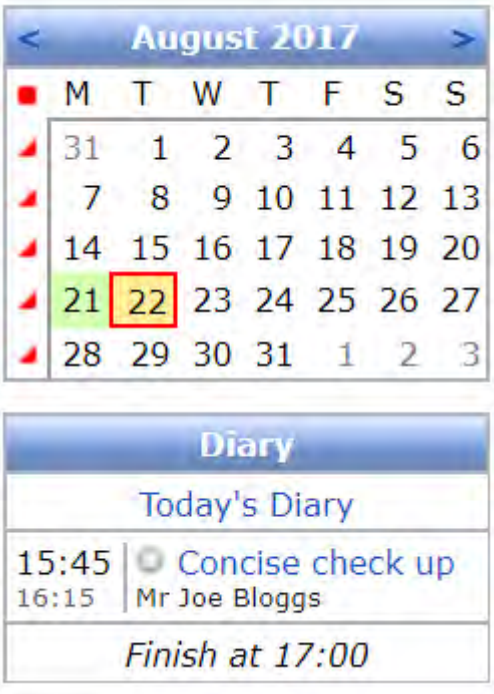
1. Select **My Details** in the **Home** menu.
2. Select the option(s) to **Reassign new user-generated tasks** and/or **Reassign new system-generated tasks** and typing in the name of a colleague or work team. Click **Update**.



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Calendar

On the left of the practitioner page is the current month's calendar and diary. To see a monthly view, click the red square in the top left-hand corner of the calendar. You can see a week view by clicking on the red triangle to the left of each week in the calendar. View a specific day by clicking on that particular date.



Dates highlighted in green indicate that there are open diaries on those dates. A square highlighted in yellow shows the diary date that you are currently are currently viewing. The current date is bordered by a red square.

Any appointments booked into an open diary for the current date are shown in the **Diary** section below the calendar. An appointment highlighted in pink indicates that the appointment has already passed.

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Diary

Clicking **Today's Diary** on the left of the practitioner page opens your diary for today. You can also open the diary by selecting **My Diaries** in the **Diary** menu. Where permission is given, you can view diaries for other staff by selecting **Others**.

If the selected diary does not cover the entire day, click **Open Another** on the top right of the opened diary. To close the diary, click **Close**.

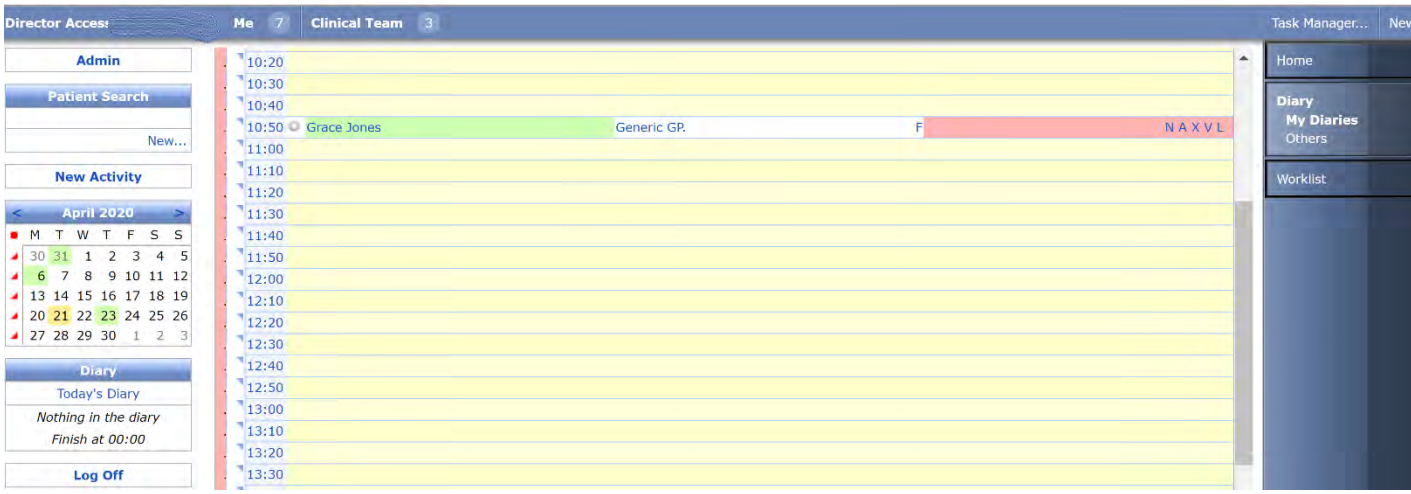
Click **P** to print the diary.

It is possible to add a comment to the diary information by clicking **Add Comment**.

Select a time slot to book an appointment. You may be able to book classes and busy slots, depending on your access rights.

Select an appointment to navigate to the patient's account.

The pink bar on the left of the diary indicates how far through the day it is.

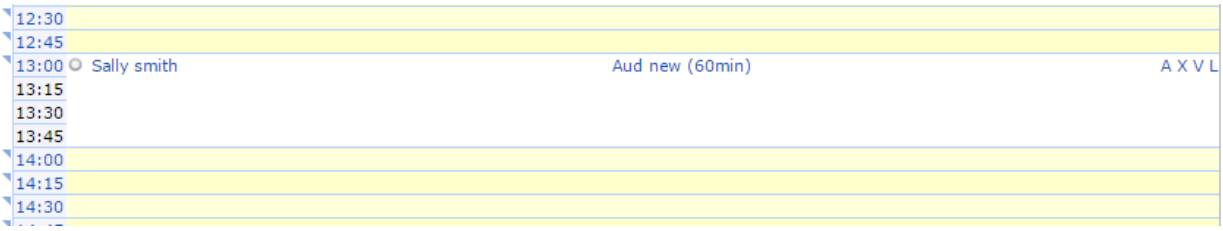


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Appointments

Appointment tracking

When viewing diaries, the patient's name is displayed on the left of the diary slot and the appointment type is displayed in the middle.

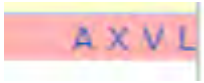


To the right of each appointment are letters which you or the practitioner should select to track the patient's progress through the appointment process:

Letter	Status
A	**Arrived** - You should select this when a patient arrives and reports to reception. This not only records the time that the patient arrived but also alerts the arrival to the practitioner by turning the circle next to the patient's name green.
X	**Did not attend** - You should select this if a patient did not attend their appointment (DNA). A prompt appears asking for confirmation of cancellation and requesting a reason for the non-attendance. A charge can be added or removed if needed. You can also cancel an appointment using this option if it is before the time of the appointment. You can also select **X** after a patient has arrived and is being seen. This indicates the appointment is abandoned for some reason by either the patient or practitioner. For example, faulty machinery, or the patient has to leave part-way through the appointment.
V	**Viewed** - The administrator or the practitioner must select this once the patient is taken in for their appointment. The circle turns yellow and alerts everyone that the practitioner is busy.
L	**Left** - The practitioner must select this when the appointment has ended. The admin team are unable to process any payment on the patient's account if this has not been selected. This turns the circle next to the patient's name to one of a variety of colours, depending on their contract.
D	**Discharged** - This is an optional status which indicates that the patient has left, or been discharged from, the clinic. For example, if a patient requires observation after an appointment.
P	**Payment** - Select this to take payment. If the circle turns blue, it means the patient is paying through a third party provider. If the circle turns pink, it means there is an outstanding charge against this patient.
F	**Form** - Indicates that for this appointment type, there is a form that the patient must fill in.

The **Arrived**, **Viewed** and **Left** time can be recorded for each section of a multi-part appointment. Conductor also records the arrival and leaving time of the whole appointment.

If the letters are highlighted in pink it signifies that there is something critical in the patient's details:



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The status of the patient is shown by the dot to the left of the patient's name.

Dot colour	Status
White	The patient is yet to arrive.
Green	The patient has arrived and is waiting. Someone in the reception of the practice usually selects **A** on the right of the appointment slot to activate this. The diary automatically refreshes as the day passes and new patients are shown in the diary.
Yellow	The patient is with the practitioner. The practitioner activates this by selecting **V**.
Blue	The appointment has finished. The patient does not have to pay because their provider is paying. The practitioner activates this by selecting **L**.
Pink	The appointment has finished. The patient has an outstanding charge.
Red	The appointment has finished. The patient has an unpaid booklet that they used to book the appointment.
Grey	The appointment has finished. The patient has a paid booklet that they used to book the appointment.
Black	The patient did not attend the appointment. This was activated by selecting **X** after the appointment time had passed.

Appointment slots are highlighted in different colours to indicate who is paying for the appointment:

Colour of appointment slot	Status
White	The appointment is charged to the patient.
Blue	The appointment is charged to the patient's insurance company.
Green	The appointment is charged to the patient's company.
Orange	The appointment is charged to the patient who has membership.
Purple	The appointment has been booked online.

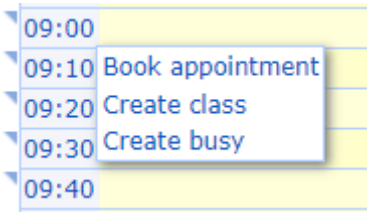
Book an appointment

The ability for practitioners to book appointments is configurable. If the feature is enabled, you can book further appointments for patients either by clicking a time slot in the diary or by using a search engine from a patient account.

Book an appointment from the diary

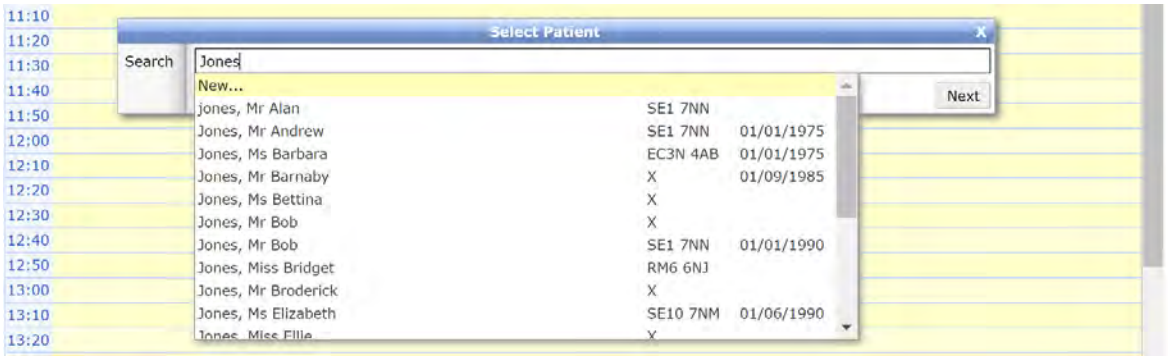
To book an appointment from the diary:

1. Select the time required for the appointment and select **Book Appointment** from the drop-down menu.

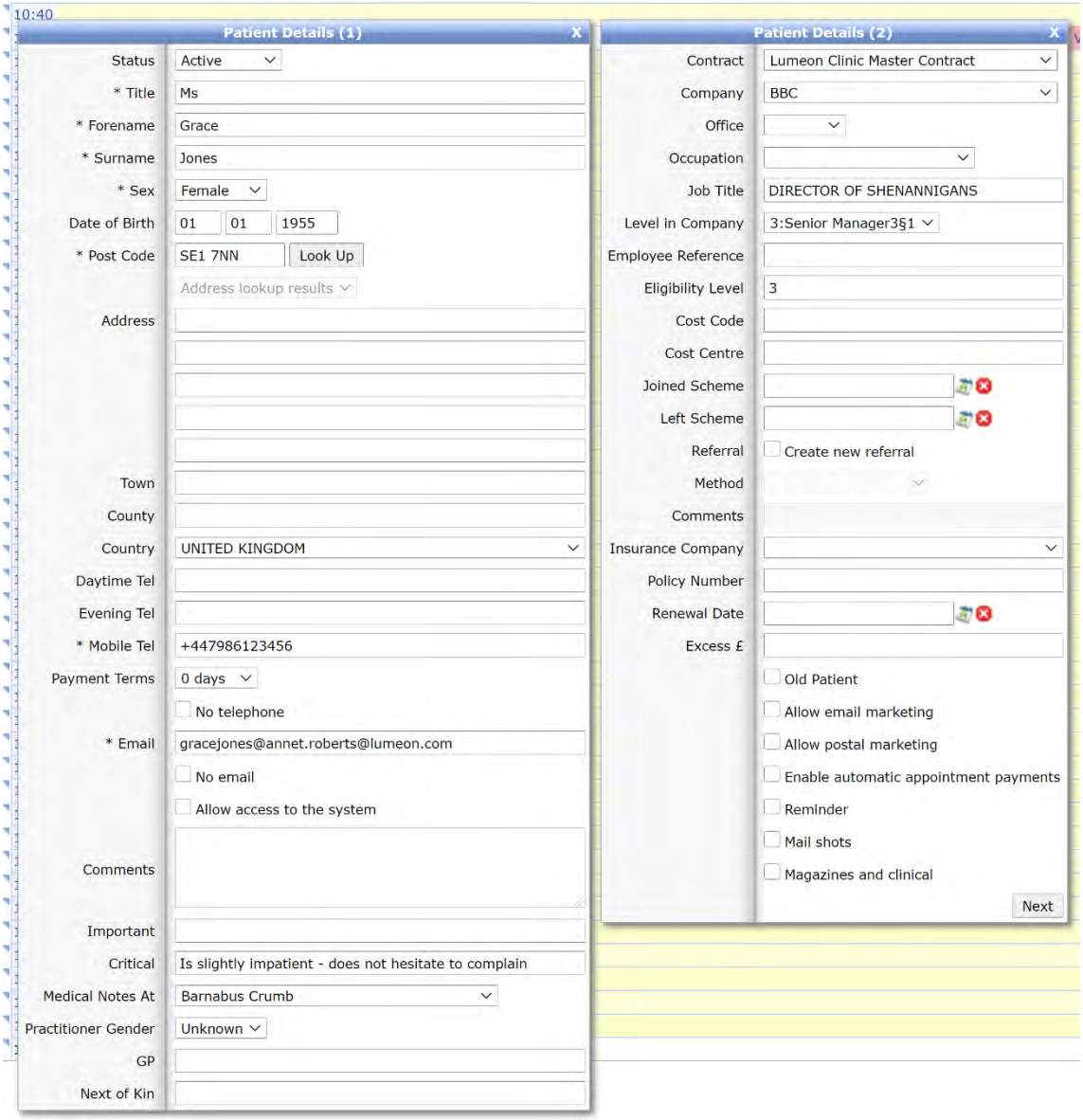


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2. Search for the patient by surname, select the relevant patient from the list and click **Next**.

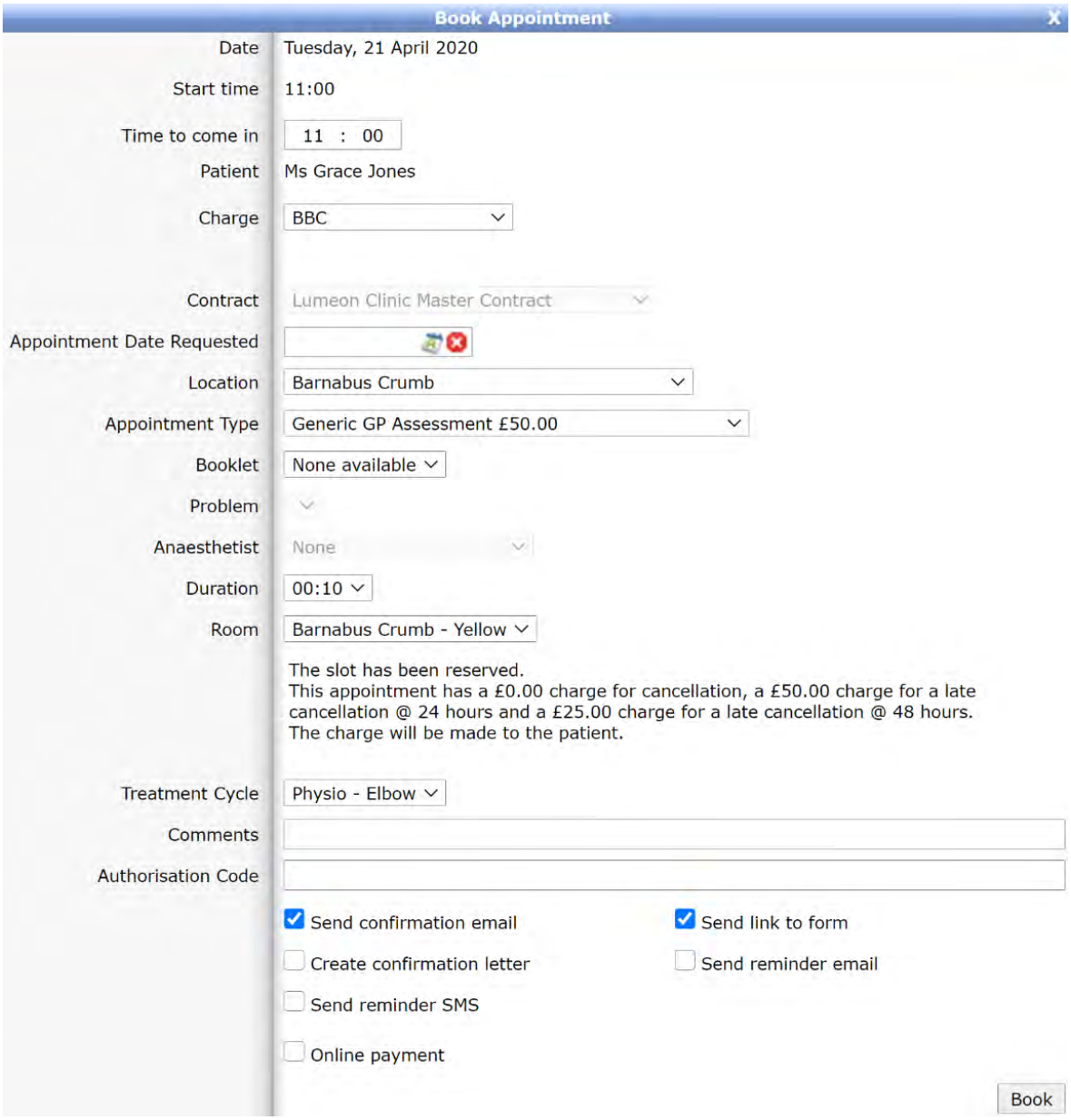


3. Ensure the patient details are correct and click **Next**.



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4. Fill in the appointment details and click **Book**.



Book an appointment from a patient account

To book an appointment from a patient account, first search for the patient and then book the appointment.

To search for a patient:

1. Select **Patient Search** in the top menu bar.

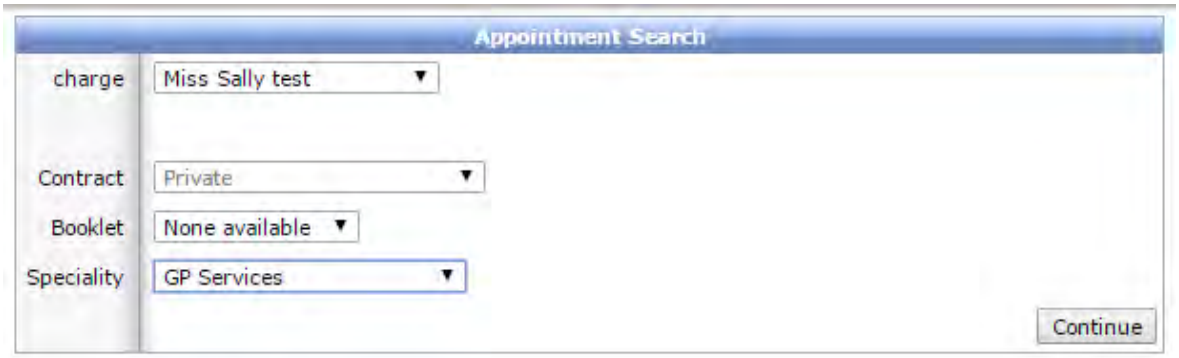
2. In **Last Name** or **First Name**, start typing the name of the patient. As you type, a list of matching patients is displayed. Select the required patient to display their details.

To book for a patient whose account is already open:

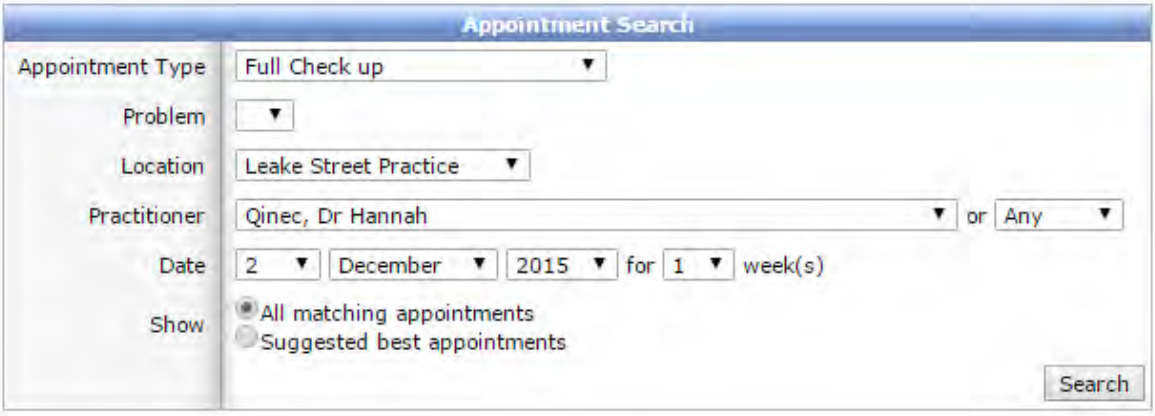
1. Select **Book Appointment** in the **Patient** menu.

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2. Select who the appointment will be charged to, the contract and booklet if applicable, and the specialty of the appointment required. Click **Continue**.

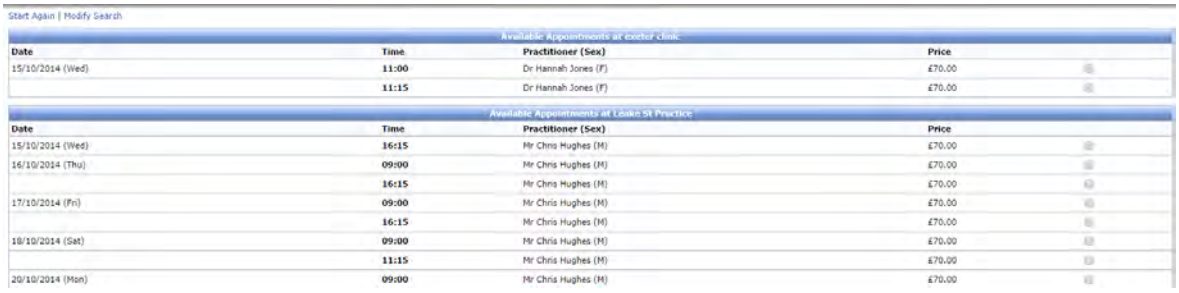


3. On the next screen, select the appointment type, location, and date. Choose a named practitioner if desired or select whether the patient wants to see a male or female practitioner.



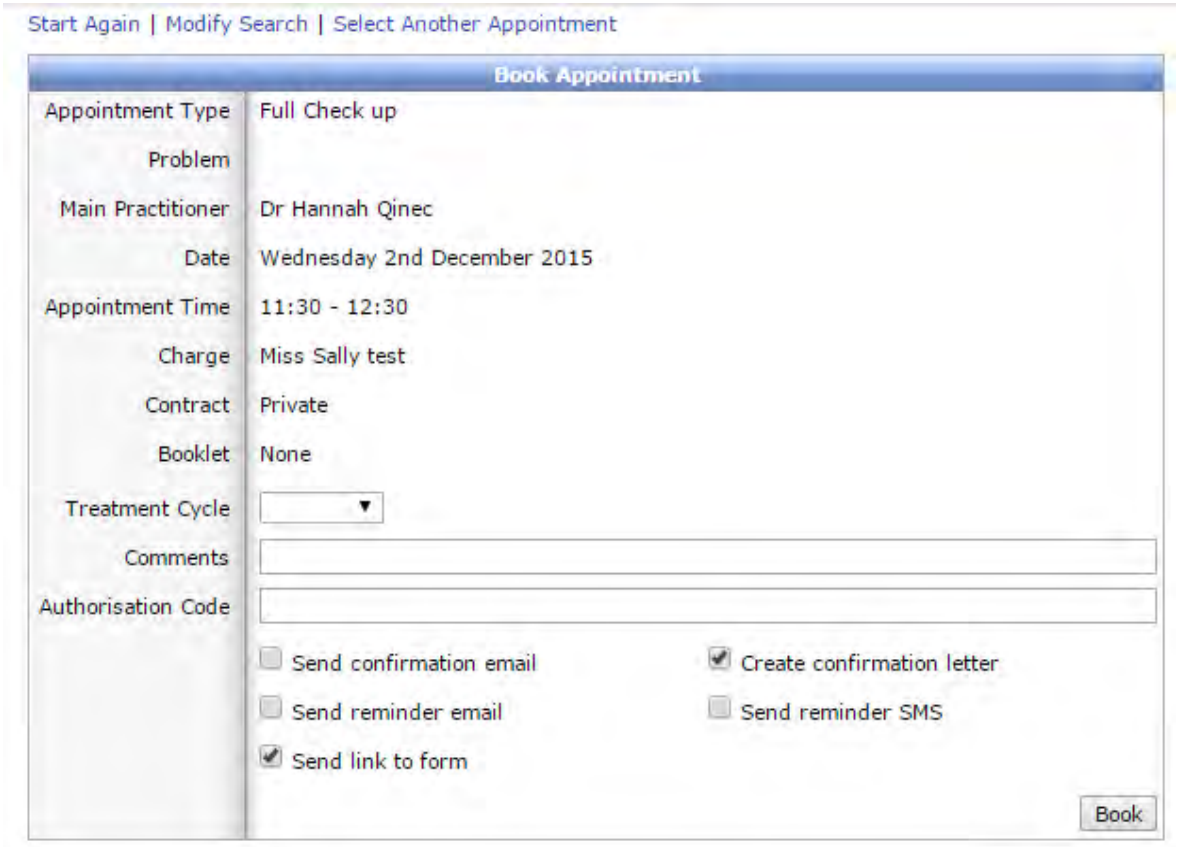
You can show either **All matching appointments** or **Suggested best appointments**. Choosing the latter proposes time slots that avoid the diary resulting in having spaces between appointments which are too short for other appointments to be booked into. Once you have chosen, click **Search**.

4. This displays a list of all available appointments. Select an appointment, fill in any additional details on the following page and click **Book**.



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5. Ensure the booking details are correct. This is where an authorisation code can be entered and an appointment can be linked to a treatment cycle. Any comments entered on this screen appear next to the appointment name in the diary.

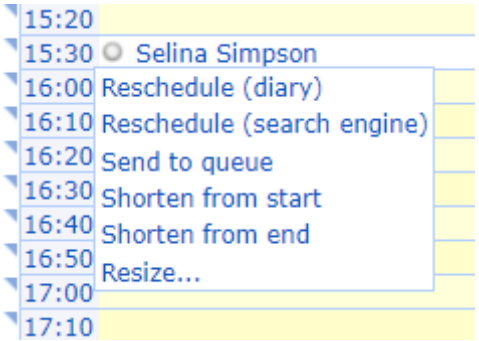


6. Click **Book**.

Reschedule an appointment

To reschedule a booked appointment:

1. Select the time adjacent to the booked appointment.



2. Select **Reschedule (diary)** to use the diary to reschedule the appointment. Click the new time for the appointment. The patient details and appointment details are displayed. Click **Reschedule** to change the appointment to the new time. The diary is displayed with the rescheduled appointment.

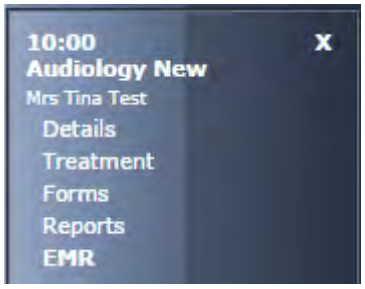
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3. Select **Reschedule (search engine)** to use the search engine to reschedule the appointment. The Appointment Search screen is displayed. Enter the details to search for a new appointment, select a new time and click **Reschedule**. The diary is displayed with the rescheduled appointment.

You can also send the appointment to the appointment queue, shorten the appointment from the start or the end, or you can resize the appointment.

Appointment details

Clicking on the appointment in the **Diary** menu under the calendar, or on the appointment type on the time slot, displays an overview of the appointment and patient details, an area to insert appointment notes and a charge search box.



This creates a menu related to the appointment on the right-hand side with the following information:

Field	Description
Details	Displays all the relevant information about the appointment including basic patient details, an option to record notes and a charge box.
Treatment	Displays all treatment cycles related to this appointment.
Forms	Displays all forms related to this appointment.
Reports	Displays all clinical reports related to this appointment.
EMR	Displays the patient EMR (if configured) for this appointment.

Depending on your configuration, this appointment menu either remains on the right-hand side until you close it or only one single patient/appointment is displayed so that existing menus are closed down if a new one is opened. Conductor warns you if there is unsaved data.

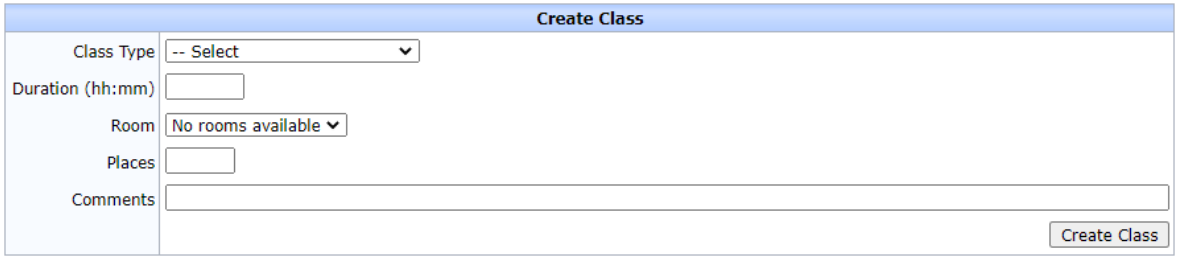
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Classes

Create a class

To create a class in a diary:

1. Select a vacant time slot in an opened diary to display the **Create Appointment** page. The **Patient Search** form displays on the left of the **Create Class** page and the **Create Class** form displays in a pop-up window.



2. Enter the class details using the fields in the table below.

3. Click **Create Class** to add the class to the diary:



The class appears in the diary and indicates how many places in the class remain.

Class details

Use the following table to complete the **Create Class** form:

Field	Description
Class Type	Select the class type from the drop-down menu.
Duration (hh:mm)	Duration of the class as set up in **Class Types**. See *Create a class type*. You can override this, if necessary.
Room	Select the room where the class will be held.
Places	Displays the number of available class places as set up in **Class Types**. See *Create a class type*. You can override this, if necessary.
Comments	Comments entered here appear in the class details.

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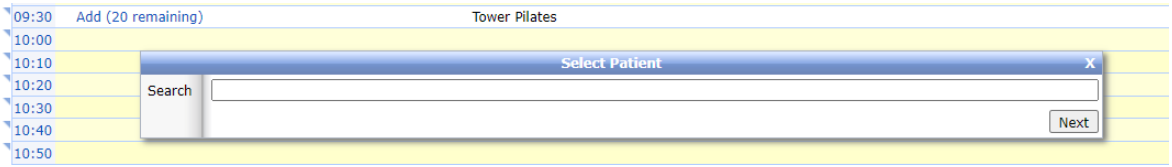
Book patients into a class

To book patients into a class using the diary:

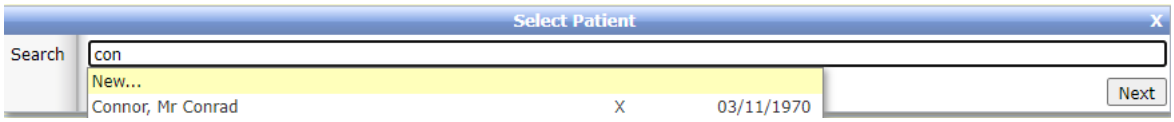
1. Locate the class in an opened diary. The number displayed in brackets indicates the number of participants that the class is designed to accommodate. When adding patients to a class, the diary indicates how many spaces remain.



2. Click **Add** in the appointment slot. The **Select Patient** page displays.

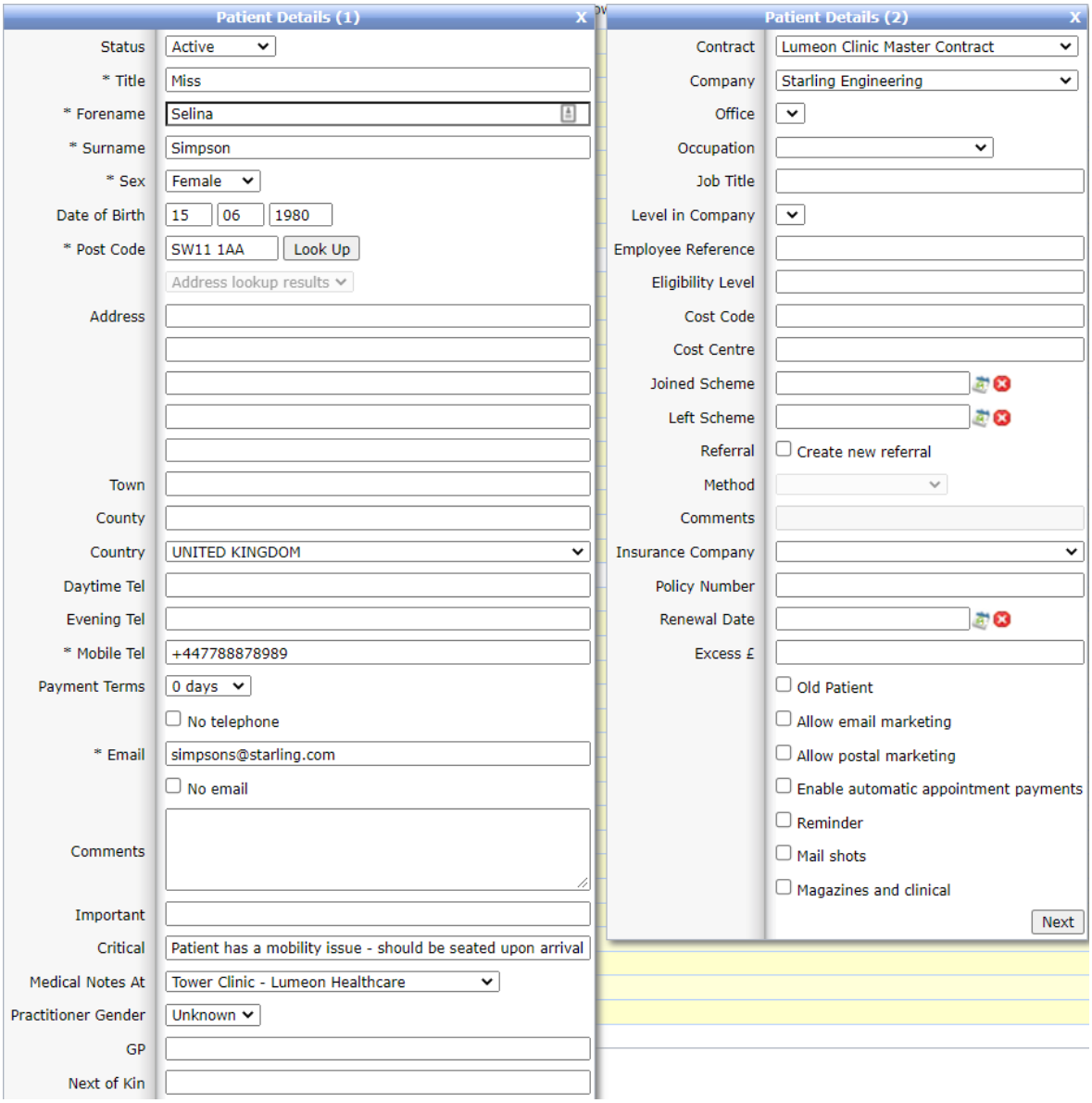


3. Start typing the patient's name. A list of matching names is displayed. Choose the correct patient and click **Next**, or select **New...** if you are adding a new patient.

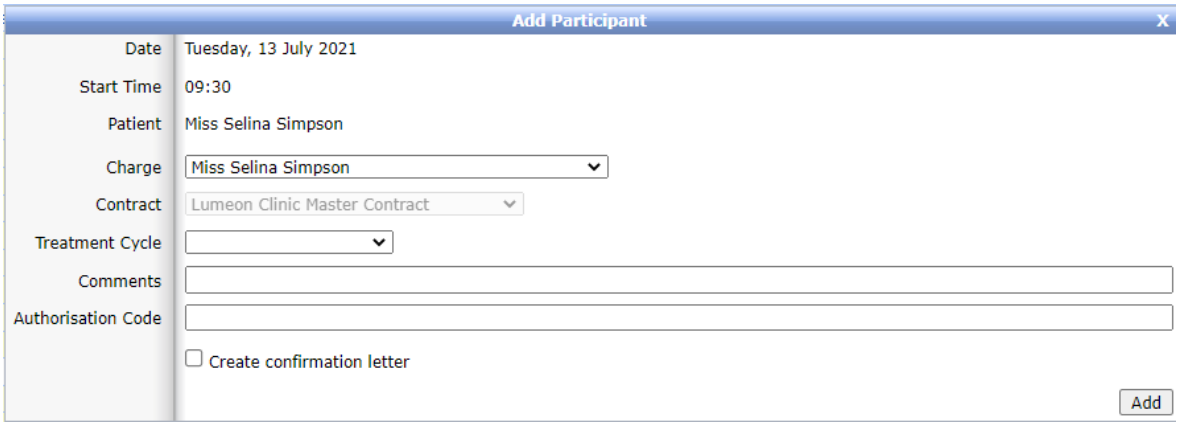


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4. The **Patient Details** are displayed. For an existing patient, check that this is the correct patient and add any missing details, if necessary. For a new patient, add the patient's details. Click **Next**.

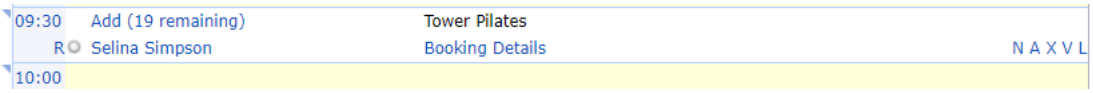


5. The **Add Participant** form is displayed. Complete the details using the table below.



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6. Click **Add** to book the patient into the class and update the number of available spaces in the class.



7. Repeat if you need to add more participants to the class.

To reschedule the patient into another class, click **R** next to the patient's name and then click on the time slot of the class that the patient is being moved to.

To open the patient's details, click the patient's name.

You can use the **NAVXL** letters to track the patient's attendance to the class.

Class participant details

Use the following table to complete the class participant details:

Field	Description
Charge	Select which party is responsible for the class charge from the drop-down menu.
Contract	Update the contract from the drop-down menu, if necessary.
Booklet	If a patient has purchased a booklet, you can take the class out of the booklet by selecting it from the drop-down menu.
Treatment Cycle	You can link the class to a patient's existing treatment cycle or create a new treatment cycle, if required.
Comments	This comment appears next to the patient's name in the diary.
Authorisation Code	Enter the patient's insurance authorization code as provided by their insurer, if applicable.
Create confirmation letter	Select to create a patient letter confirming the booking.
Online payment	If Conductor has an integration to a payment provider, select this check box to take card or direct debit payments.

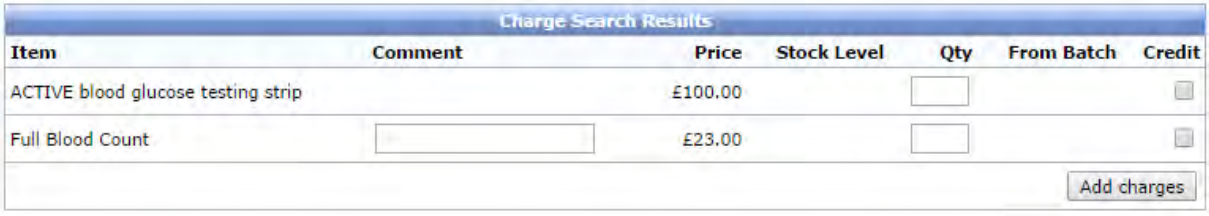
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Charges

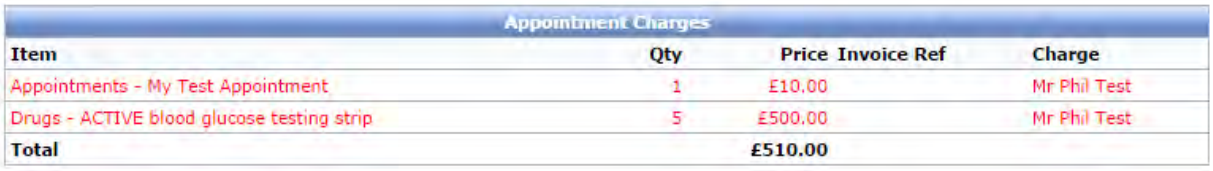
The **Charge Search** search box on the **Appointment Details** page enables you to search for additional items to manually bill to that patient. Type in the first few letters of the item and select **Charge to Patient** if the patient is paying for the item. Click **Search**.



This displays a list of search results. Click on the appropriate item and, if necessary, the price and quantity. Click **Add Charges**.



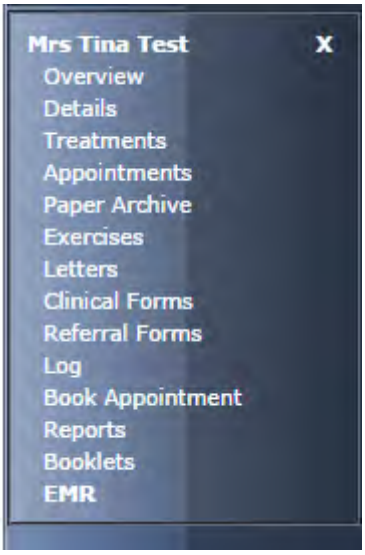
A list of charges displays in the **Appointment Charges** form, indicating who is due to pay those charges.



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Patient details

Clicking on a patient's name in a diary time slot displays a menu related to the patient on the right-hand side. You can also display this menu by clicking on the appointment in the **Diary** menu under the calendar.



The following table describes each option in the new menu.

Field name	Description
Overview	Summary of the patient's details, next and previous appointments and classes, treatment cycles, exercises, uploaded files and letters.
Details	Patient details which you can edit or update.
Treatments	All treatment cycles linked to this patient and gives the option of opening a new treatment cycle. See *Treatment cycles (page 26)*.
Appointments	All past and future appointments and classes for the patient.
Paper Archive	The paper archive, which is where files relating to a patient can be uploaded. See *Paper archive (page 27)*.
Exercises	You can create exercise programmes for patients, if this has been configured. See *Exercise programmes (page 27)*.
Letters	Where you can create and send letters to patients.
Clinical Forms	All clinical forms relating to the patient.
Referral Forms	All referral forms relating to the patient.
Log	Patient log, which documents all events relating to the patient.
Book Appointment	Book future appointments for a patient.
Reports	Generate and view patient reports.
Booklets	Whether a patient has purchased a booklet and offers the option of adding booklets to a patient's account.
EMR	Patient's electronic medical record (EMR).

To return to the diary from any of the above screens, click **Today's Diary**. The patient details are still retained for easy access in the menu on the right of the screen. you can close these screens by clicking the **X** next to the name or the appointment details.

You can search for a patient, using the **Patient Search** box in the top left-hand corner of the screen. Enter the first few letters of the patient's surname to display a list of matching patients. Postcode and date of birth are also displayed to help differentiate patients with identical names.

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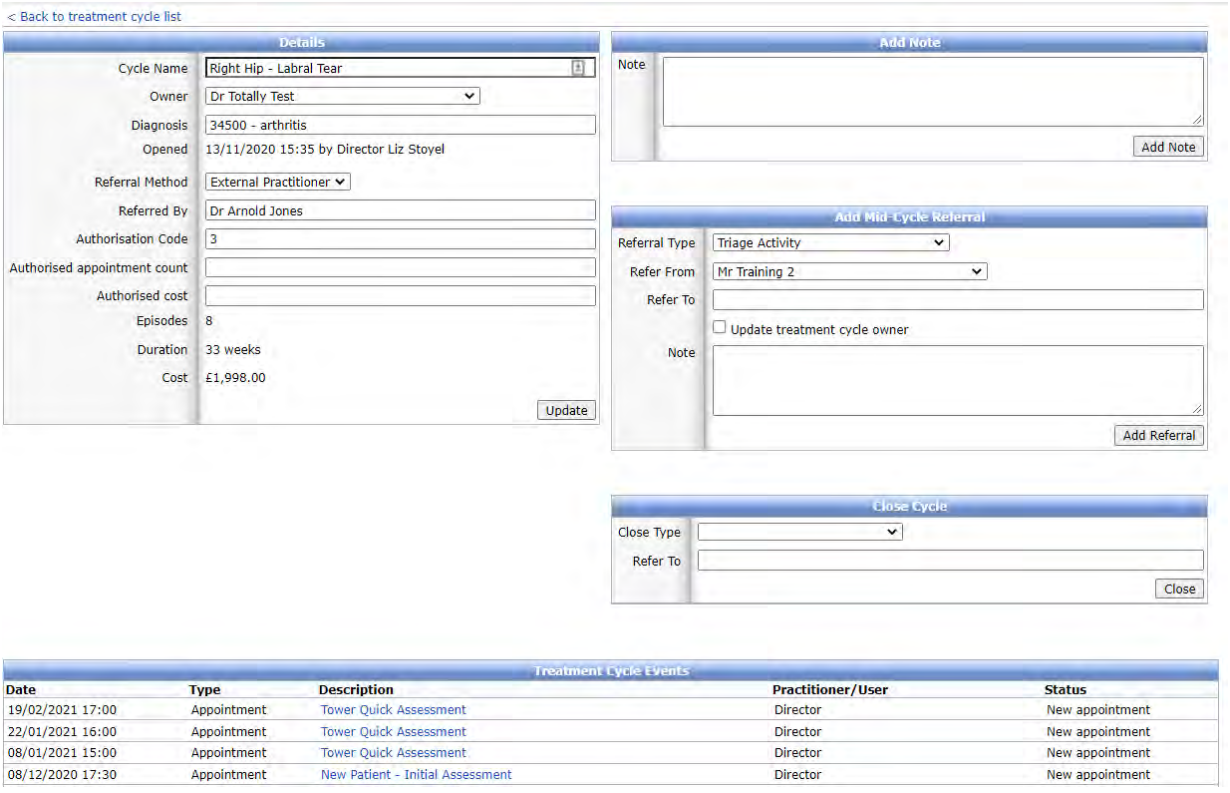
Treatment cycles

A treatment cycle is a group of appointments that are tied together for the purpose of monitoring treatments. The option to create and view treatment cycles in Conductor depends on your configuration. Treatment cycles are created by the administrator who booked the appointment.

Select **Treatments** in the patient's menu to display all existing patient treatment cycles.



Select an existing treatment cycle to display the details.



You can add:

- **Diagnosis** - Add a diagnosis code. This works on an autocomplete system; enter part of the code to display matching search results.
- **Notes** - Add notes. These are attached to the cycle and not to individual appointments. This means that there is continuity within the group of appointments and that individual groups of appointments from patients who attend more than once, for different conditions over a long period of time, may be monitored individually.
- **Mid-Cycle Referral** - Choose the appropriate referral type and referrer. The **Refer To** section works on an autocomplete system. Click **Add Referral**.

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When a patient's treatment is complete, you should complete the **Close Cycle** section. Enter a reason for discharge as well as an ongoing referral destination, if appropriate. This enables your organization to monitor who the patient is referred to.

You may be able to view the treatment cycle in the patient's EMR, depending on your configuration.

Paper archive

Select **Paper Archive** in the patient's menu to display existing documents and upload new documents. The top level contains folders represented by green squares. Select one of these folder links to display the documents inside. Past uploads can be displayed in a list at the bottom of the page.

To upload a file, click **Upload**, choose the file, and click **Upload** in the pop-up window.

To view or update file details, click on the required file name. To join files, click on the name and the image of both files and click **Join**. Joined files are shown with a blue circle. To split the files, click on the name and image of the blue circle and click **Split**.

Clicking **Shared** allows the patient to view the file in the patient portal. The document is highlighted in pink to indicate it is being shared.

To delete a file, select and drag the file over **Trash**.

You can move files to the paper archive pool by selecting and then dragging the file over the purple circle labelled **Pool**. Administrators can access the paper archive pool to copy files from within the pool to other patients' records.

To rename a file, click on the file name and then the file image. Change the name in the **Preview** section, and press **Enter**.

To rotate a document, click on the file name and then click on the image. Click **Rotate** in the **Preview** section.

Exercise programmes

If exercises are included in your configuration, you can create unique exercise programmes for each patient.

You can assign an existing exercise programme to a patient or you can create a new exercise programme from existing exercises. You can also add individual exercises to an existing exercise programme.

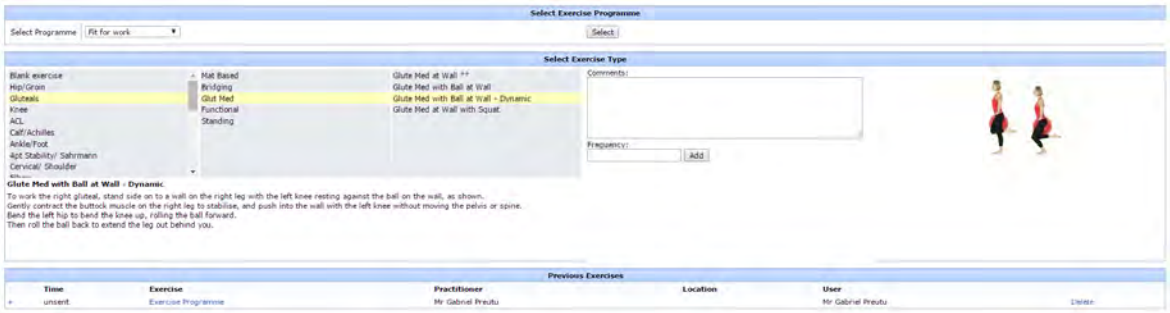
To view the exercise page for a patient, select **Exercises** in the patient's menu.

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Assign an existing exercise programme

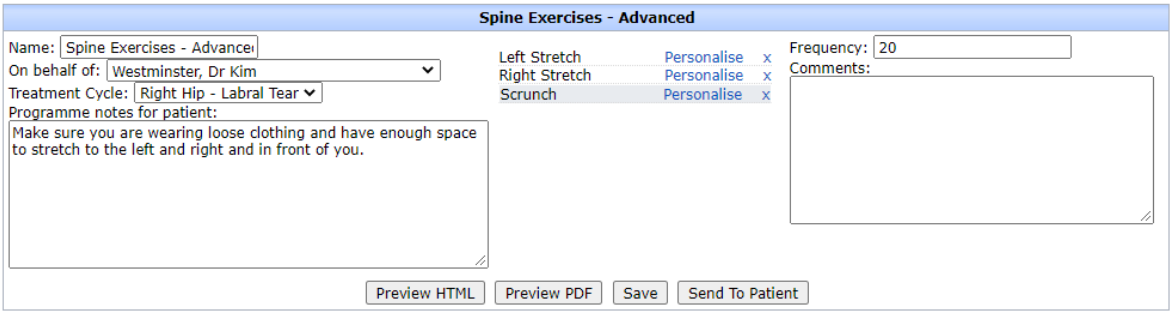
To assign an existing exercise programme to a patient:

1. Select the exercise programme required from the drop-down list and click **Select**. The details of the exercise programme appear in the section below. It also appears in the list of **Previous Exercises**.



2. You can also add individual exercises to the programme.

3. In the section below, enter the practitioner that you have assigned the exercise programme on behalf of.



4. Select the treatment cycle from the drop-down list and enter programme details for the patient, if required.

5. Enter programme notes for the patient and comments, if required.

6. You can delete individual exercises from the programme, if necessary. You can also personalize an individual exercise by changing its name, the steps, or the frequency.

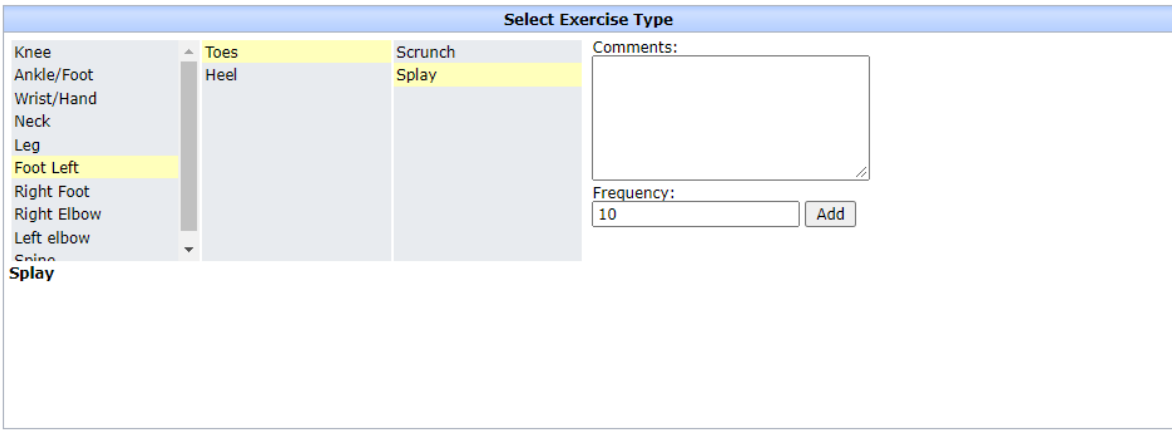
7. Click **Save**.

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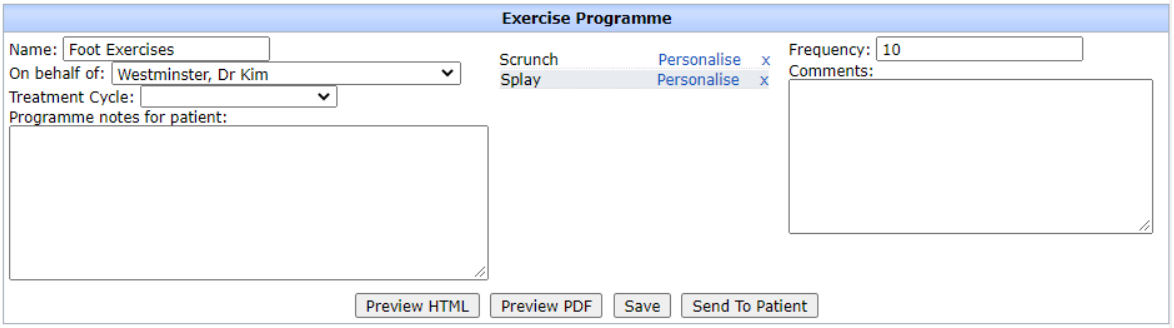
Create a new exercise programme

To create a new exercise programme for a patient or add more exercises to an existing programme:

1. In the **Select Exercise Type** section, select the part of the body, exercise type, and exercise sub-type.



2. Enter comments, if required, and a frequency.
3. Click **Add**.
4. Continue to add all the exercises you need in this programme.
5. In the section below, enter a name for the exercise programme.



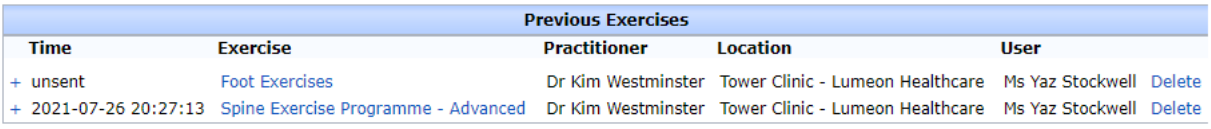
6. Enter the practitioner that you have assigned the exercise programme on behalf of.
7. Select the treatment cycle from the drop-down list and enter programme details for the patient, if required.
8. Enter programme notes for the patient and comments, if required.
9. You can personalize an individual exercise by changing its name, the steps, or the frequency.
10. Click **Save**.

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Other options

You can view the exercise programme in either HTML or PDF format.

To email the exercise programme to the patient, click **Send To Patient**. This adds the date and time that the email is sent to the exercise in the list.

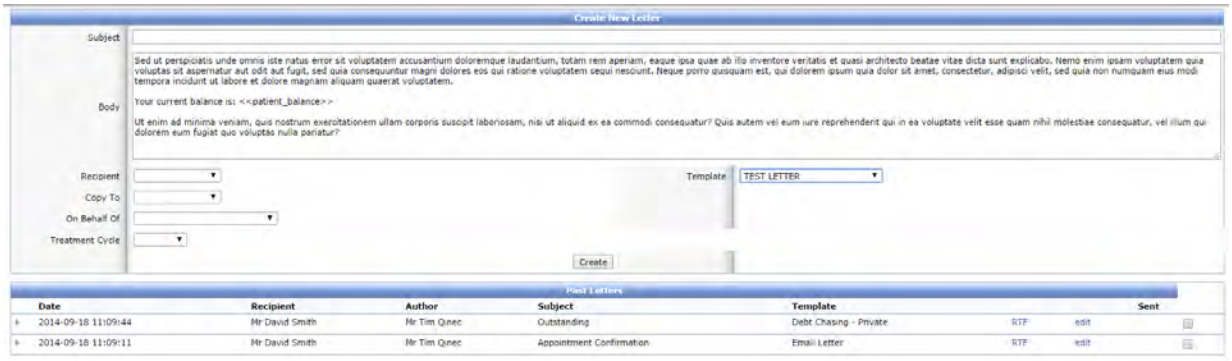


To view an existing exercise programme, click on the exercise name in the **Previous Exercises** list. You can also click **Delete** to remove an existing exercise programme for this patient.

Letters

You can create letters by selecting **Letters** in the patient's menu. Once there, choose the letter template.

Once the letter template has loaded the pre-populated material, add any additional information. Then choose a recipient and a treatment cycle if necessary. You can also choose to send the letter on behalf of someone else, in which case their details are added to the letter. If this is not the case, then your details are used. To create the letter, click **Create**.



To view a created letter, click **RTF** to download the letter as an RTF file.

To edit an existing letter, click **Edit**. All changes to the letters are stored and a complete audit trail of all edits is visible to anyone editing the letters.

Forms

Forms are entirely customizable and can be set up to capture patient data for particular appointments.

To create a form for a patient:

1. Display the patient details, and click **Forms** in the **Patient** menu. A table of forms displays on the left hand side and the **Create Form** displays on the right hand side.



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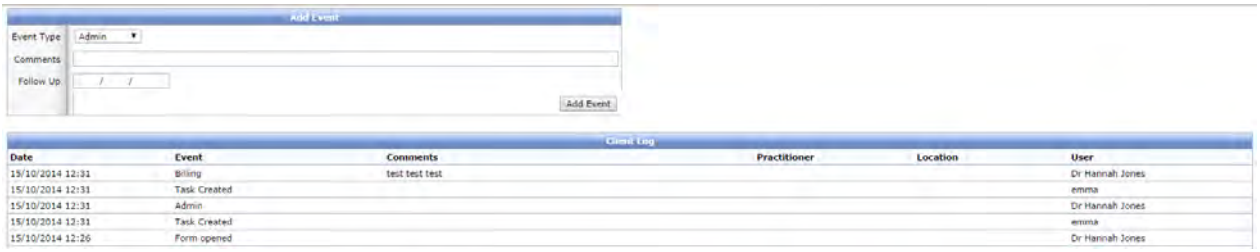
2. Select the form type from the drop-down list in the **Create Form** section and click **Create**. The form displays in the table of forms on the left hand side.

3. Select the form and enter the required information. Ensure that each section is saved.

4. Click **OK** to save the answers on the form. Then click **Close** to close the window.

Patient log

You can access the patient log by selecting **Log** in the patient's menu. The patient log records all events related to the patient's account. To add an event, select the event type from the drop-down list, enter relevant comments. Enter a follow-up date to create the event as a task. Click **Add Event**.



An administrator can add additional event types.

Clinical reports

You can create a clinical report for a patient. To do this:

1. Select **Reports** in either the appointment menu or the patient's menu.



2. Select the report type from the drop-down list.

3. The **Copy To** drop-down list enables you to send a copy of the clinical report to another practitioner, if the clinical report template has been designed to incorporate this.

4. Click **Create**.

The report appears in the section on the left. Click on the name of the report to ensure the information is correct. Click **Generate** and then click **View** to download the report.

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Booklets

Booklets of appointments can be created for patients at a set, often discounted, price. To add a booklet to a patient's account, click **Booklets** in the patient's menu. Complete the **Add Booklet** section with the appropriate details and click **Add**.



Existing booklets that have previously been added to the patient's account are displayed on the left.

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Electronic Medical Record (EMR)

The Electronic Medical Record (EMR) enables Lumeon Conductor to capture and display clinical data and records in a single central record for each patient. It is a cloud-based record with advanced security that is only accessible to practitioners.

The EMR has a mix of standard pages, such as **Overview**, **Journal** and **Prescriptions**. It also has bespoke pages which can be set up to capture client-specific data. For example, each patient can have customizable pages for each specialty that is relevant to them.

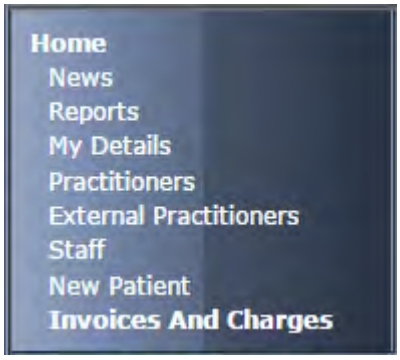
See ***Electronic Medical Records in Lumeon Conductor*** for information on how to set up and use the EMR.

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Invoices and charges

The invoices and payments option is a core configuration setting.

If this option is available, you can view charges and invoices by selecting **Invoices and Charges** in the **Home** menu.



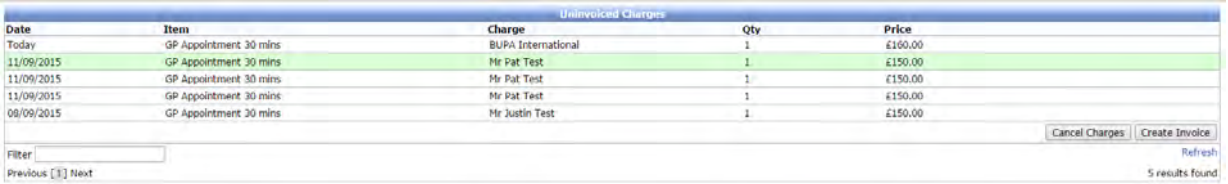
To create an invoice, click on the uninvoiced charge and click **Create Invoice**.



You can cancel a charge by selecting it and clicking **Cancel Charges**.

Once an invoice has been created it appears below Invoices where you can download it. You can filter the invoices to show either paid or unpaid invoices.

To record that the payment has been taken click **Take Payment** and fill in the payment details.

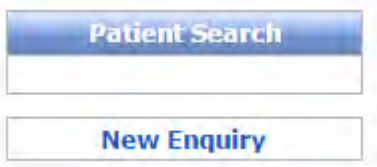


Invoices, statements, and payment confirmations are downloaded in PDF format.

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Create a new enquiry

You can enter details of new enquiries or referrals by clicking **New Enquiry** underneath the **Patient Search** bar and completing the form.



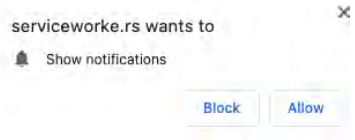
These details display on the **New Enquiries Worklist**.

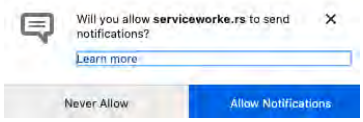
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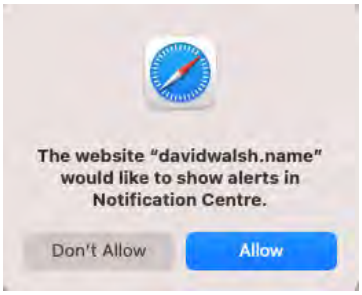
Notifications

Notifications enable you to receive alerts telling you that an action needs to be performed in Conductor. This is useful if you have Conductor running but the browser or tab is minimized. For example, if your organization has a pathway where patients send an SMS to say they have arrived for their appointment, the pathway can send a notification to alert appropriate users who need to respond to the patients.

When you first log into Conductor after push notifications have been enabled, Conductor sends you a message asking for permission to send notifications. The format of this message depends on the browser you use. For example:







If you click **Allow**, you will receive notifications from Conductor according to the logic in the pathways. If you click **Block** or **Don't Allow**, you will not receive notifications from Conductor. If you accidentally block notifications, search for instructions on how to allow them on your browser. Alternatively, contact your system administrator or Lumeon Support.

Available browsers

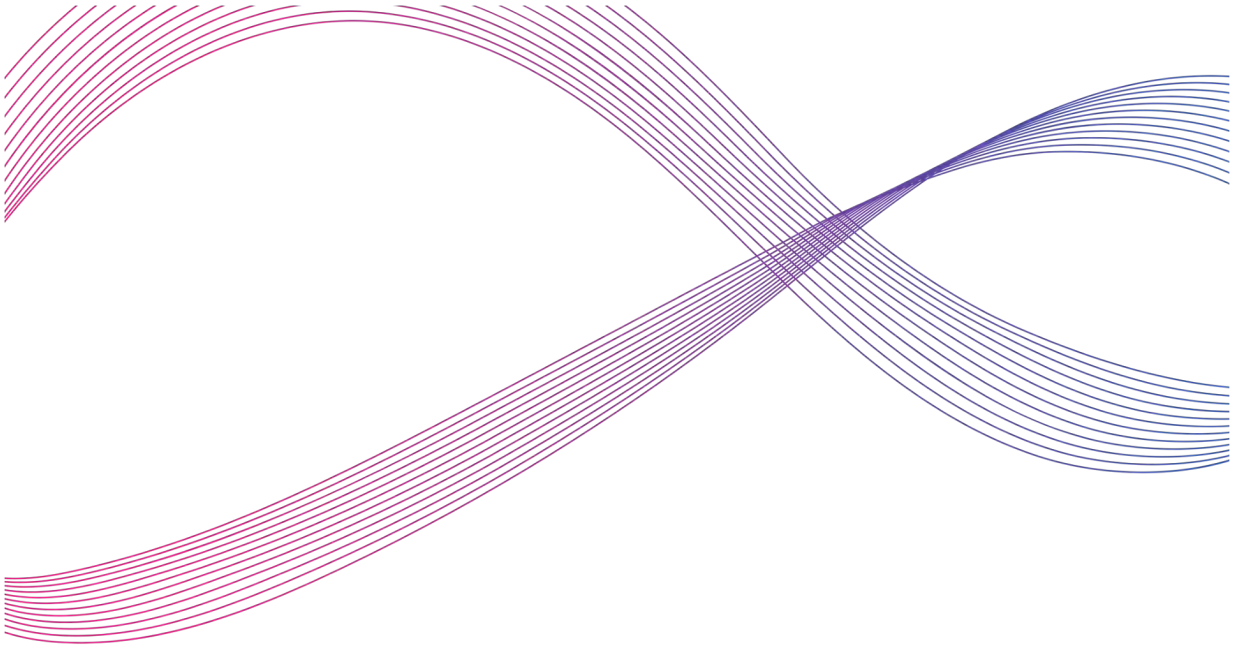
Conductor can send notifications on the following browsers:

- Windows computers:
  - Chrome
  - Edge
  - Firefox
- MacOS computers:
  - Chrome
  - Firefox

Notifications are not available on:

- Internet Explorer
- Safari
- Any mobile phone browsers.

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Patient Portal in Lumeon Conductor 24.2

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Introduction

The Patient Portal enables your patients to book appointments, manage upcoming appointments and classes, view and fill in forms, manage their booklets and their diary, and maintain their personal details. You can decide which features you would like patients to be able to access. The Patient Portal can use your organization's logo and branding. Also, you can select the level of security that patients need to comply with to access the Patient Portal.

Patient Portal functionality

The Patient Portal integrates with the existing Conductor platform and enables patients to:

- Search for and book appointments and classes
- Manage upcoming appointments and classes
- View and fill in forms
- Manage booklets
- Manage their diary
- View and maintain their personal details

Authentication

The Patient Portal can be configured to use existing Conductor authentication functionality to allow patients to securely access the portal, optionally including:

- Two factor authentication
- Security questions
- Strict passwords

Purpose

The purpose of this document is to:

1. Capture the decisions you must make so that Lumeon can configure the Patient Portal to your requirements - see *Patient Portal configuration decisions (page 5)* and *Checklists (page 56)*.
2. Explain the tasks that you, as a system administrator, must perform to set up the Patient Portal for your patients - see *System administrator setup (page 12)*.
3. Provide an overview of key Patient Portal features - see *Key features of the Patient Portal (page 34)*.

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Patient Portal configuration decisions

If you want your patients to use the Patient Portal, you need to make a number of decisions regarding how you want the Patient Portal to be configured to suit your organization's requirements. These decisions fall into three categories:

1. **Custom styling** - You can configure the logos and colours of the Patient Portal to match your organization's branding. See *Custom styling decisions (page 5)*.
2. **Core configuration** - You can configure the Patient Portal to display the functionality that you want your patients to see. See *Core configuration decisions (page 7)*.
3. **Optional authentication configuration** - You can enable optional authentication features, including two factor authentication, security questions, and strict passwords, to increase the level of security of your Patient Portal. See *Optional authentication decisions (page 8)*.

Checklists are provided at the end of this document so that you can make sure that you have covered all the configuration decisions - see *Checklists (page 56)*.

Custom styling decisions

Lumeon can style the Patient Portal to suit your organization's colour palette and branding requirements. What do you want the Patient Portal to look like?

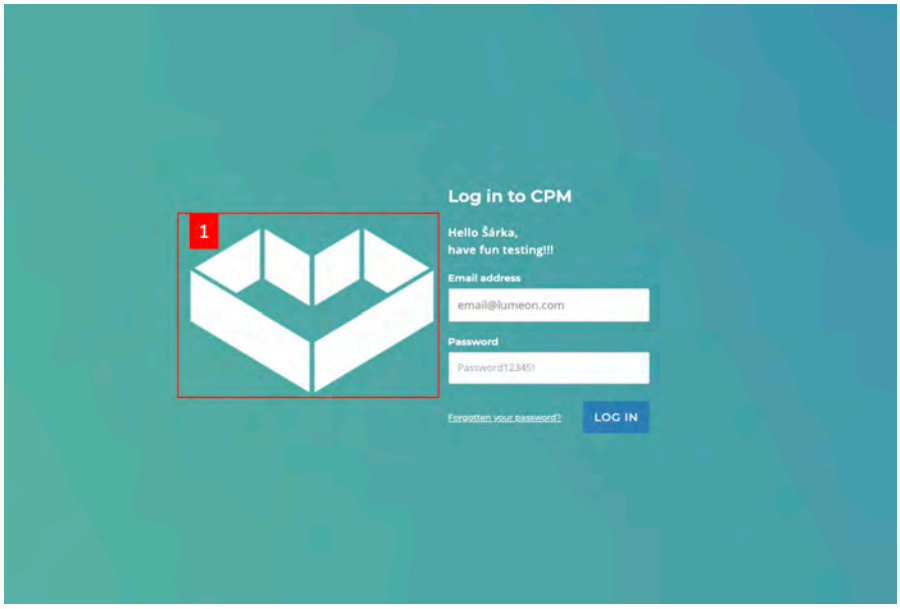
Lumeon can configure the following for you:

- Login screen logo
- Login screen background colour
- Home screen logo
- Primary colours (dark, normal, light)
- Secondary colours (dark, normal, light)

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Login screen

Lumeon can add your logo to the Patient Portal login screen and set the background colour.



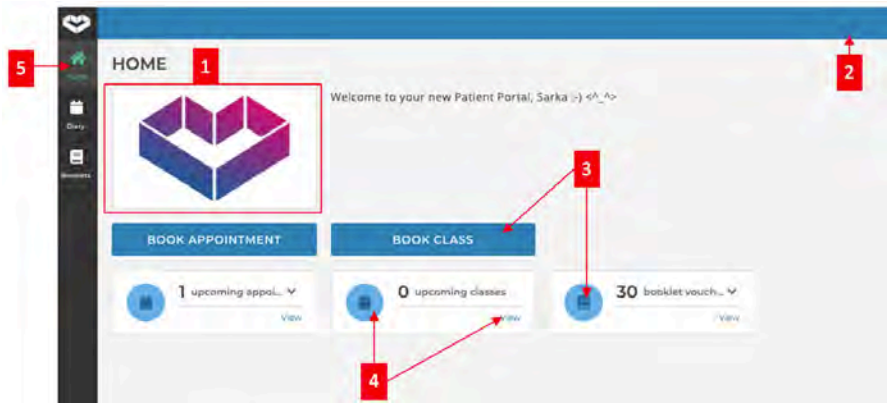
Lumeon can configure the following design attributes:

	Design attribute	Description	Acceptable formats
1	Authentication logo	Lumeon can load your logo here.	PNG format. The logo is resized to width 339 px and height 236 px.
2	Background colour	Lumeon can set the background colour from your colour palette. It can be a plain colour, for example, all white, or a gradient of two colours, as shown in the example above.	#HEX format

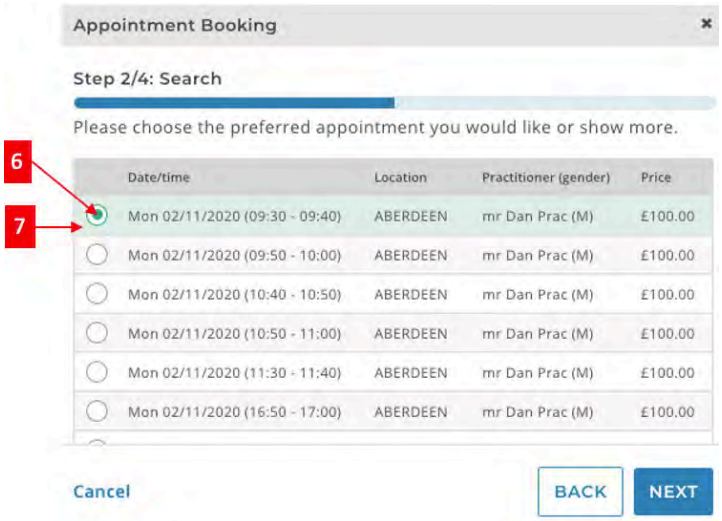
Home screen

The custom styling on the **Home** screen is made up of two colour sets, which each contain three variants:

- Primary colours are the main colour theme associated with your brand.
- Secondary colours are used as an accent colour to denote selection.



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Lumeon can configure the following design attributes:

	Design attribute	Description	Acceptable formats
1	Home screen logo	You can display your own logo here.	PNG format. The logo is resized to width 339 px and height 236 px.
2	Primary colour (normal)	The primary colour in your organization's palette. Used for the top menu bar.	#HEX format
3	Primary colour (dark)	A darker variant of the primary colour that helps create contrast between screen elements. Used for: · Call To Action (CTA) button backgrounds · Links · Secondary button borders and font	#HEX format
4	Primary colour (light)	A lighter variant of the primary colour that helps create contrast between screen elements. Used for the background of card icons.	#HEX format
5	Secondary colour (normal)	The secondary colour in your organization's palette. The colour used to provide accent within the Patient Portal. Used for menu selection.	#HEX format
6	Secondary colour (dark)	A darker variant of the secondary colour. Used for selected checkboxes and radio buttons.	#HEX format
7	Secondary colour (light)	A lighter variant of the secondary colour. Used for row highlighting.	#HEX format

Core configuration decisions

If you want your patients to access the Patient Portal, you must consider the following:

- Patient Portal functionality - see *Patient Portal functionality (page 8)*.
- Patient access to personal details - see *Patient details decision (page 8)*.

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Patient Portal functionality

The following features are always available in the Patient Portal:

- **Book appointments** - Patients can book appointments using the appointment booking wizard. See *Appointments (page 38)*.
- **Diary** page - Patients can view upcoming appointments and classes, and they can cancel them. See *Diary (page 47)*.
- **My Details** page - Patients can view their personal details and, optionally, they can change them depending on the core configuration. See *My details (page 53)*.

The default Patient Portal configuration enables the following additional functionality:

- **Book classes** - Patients can book classes using the class booking wizard. See *Classes (page 43)*.
- **Forms** - Patients can view and fill in forms that a practitioner has assigned to them. See *Forms (page 50)*.
- **Manage booklets** - Patients can book appointments or classes from booklets that they have purchased and have been added to their account. See *Booklets (page 52)*.

Speak to Lumeon if you do not want the functionality for patients to book classes, view and fill in forms, and/or manage booklets,.

Patient details decision

The **My Details** page enables patients to manage their personal details, including name and address, contact details, insurance details, communication preferences and updating passwords.

You can choose whether your Patient Portal users can:

- Simply view their personal and address details in read-only form. Their insurance details are not displayed.
- View all their personal details, including name and address, contact details, insurance details, and communication preferences. They can change their personal details, communication preferences, and their passwords.

In the default Patient Portal configuration, users can view all their details and update them.

Let Lumeon know if you would like to restrict your Patient Portal users so that they can view personal details and cannot change them.

Optional authentication decisions

Lumeon Conductor has a number of authentication features that can be enabled to ensure that Patient Portal users have secure access to it.

These authentication features are disabled in the default Patient Portal configuration unless they are already being used in your Conductor platform.

You can contact Lumeon to enable these authentication features for the Patient Portal but you must be aware of the impact on other users of your Conductor platform.

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The optional authentication features that Lumeon can enable in the Patient Portal are:

- **Two factor authentication** - do you want your Patient Portal users to enter a one-time access code when they log in to the Patient Portal? See *Two factor authentication decisions (page 9)*.

  2FA can be enabled for patients signing on to the Patient Portal without affecting other Conductor users, such as administrators, practitioners, and system administrators.

- **Strict passwords** - Conductor offers two strengths of password: standard and strict. The default Patient Portal uses standard passwords. Do you want to implement strict passwords? See *Strict password decisions (page 10)*.

  If you enable strict passwords for Patient Portal users, they are also enabled for all your Conductor users, including administrators, practitioners, and system administrators.

- **Security questions** - do you want your Patient Portal users to set up security questions which they have to answer correctly when they log in to the Patient Portal? See *Security questions (page 10)*.

  If you enable security questions for Patient Portal users, it is also enabled for all your Conductor users, including administrators, practitioners, and system administrators.

Two factor authentication decisions

Two factor authentication (2FA) provides extra security as it requires more than one authentication point for a user to successfully log in. A commonly used 2FA method is username/password and a one-time access code sent via SMS or email to the user. 2FA can be set up to send an access code to either an email address or a mobile phone via SMS.

2FA is disabled by default in the Patient Portal, unless you already use it in Lumeon Conductor.

You can enable 2FA for any user type in Conductor so Lumeon can enable 2FA for Patient Portal users but it does not affect other users, such as administrators, practitioners, and system administrators.



If you want to enable 2FA, you must ensure that all your patients have an email address or a mobile phone number set up so that they can receive the one-time access code when they log in to the Patient Portal.

Do you want the 2FA one-time access codes to default to SMS or email?

SMS 2FA pricing
SMS two factor authentication incurs additional charges but is recommended for extra security.

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Strict password decisions

Do you want your patients to use strict or standard passwords when they log into the Patient Portal?

Strict passwords are disabled by default in the Patient Portal, unless you already use this functionality in Lumeon Conductor.

Strict passwords must be:

- Minimum 8 characters long
- At least one uppercase letter
- At least one lowercase letter
- At least one number
- At least one special character
- No dictionary words

Standard passwords must be:

- Minimum 6 characters long
- At least one uppercase letter
- At least one lowercase letter
- At least one number

Do you want to enable strict passwords for Patient Portal users?



If you enable strict passwords for Patient Portal users, they are also enabled for all your Conductor users, including administrators, practitioners, and system administrators.

Security questions

Do you want your patients to set up security questions so that they have to provide the answers when they change or forget their password or get locked out of the Patient Portal?

Security question functionality is disabled by default in the Patient Portal, unless you already use it in Lumeon Conductor.

If you want to enable security question functionality, Lumeon provides ten security questions, The default set are:

1. What was the first foreign country you visited?
2. What was the name of your first pet?
3. What was your favourite book as a child?

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4. What was your favourite film as a child?
5. What's the name of the person you first kissed?
6. What's the first name of your closest childhood friend?
7. What's the last name of your favourite school teacher?
8. What's the last name of your first boyfriend or girlfriend?
9. What's the name of the band you liked most as a teenager?
10. Which TV series did you like most as a child?



Security Questions	
Name	
What was the first foreign country you visited?	Cancel
What was the name of your first pet?	Cancel
What was your favourite book as a child?	Cancel
What was your favourite film as a child?	Cancel
What's the first name of the person you first kissed?	Cancel
What's the first name of your closest childhood friend?	Cancel
What's the last name of your favourite school teacher?	Cancel
What's the last name of your first boyfriend or girlfriend?	Cancel
What's the name of the band you liked most as a teenager?	Cancel
Which TV series did you like most as a child?	Cancel

If you enable security question functionality, you can add more security questions or delete existing ones.



If you enable security questions for Patient Portal users, it is also enabled for all your Conductor users, including administrators, practitioners, and system administrators.

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System administrator setup

Once Lumeon has configured the Patient Portal to meet your requirements, you must carry out a number of system administration tasks to complete the setup of the Patient Portal. Alternatively, you can contact Lumeon Support if you want us to carry out some or all of these tasks for you.

These tasks include:

1. Ensuring the email and SMS templates are set up. See *Email and SMS templates (page 12)*.
2. Setting up Patient Portal display text. See *Set up Patient Portal display text (page 17)*.
3. Setting up security questions, appointment types, classes, booklets, patient forms, and cancellation policy and reasons, if necessary. See *Other system administrator setup tasks (page 19)*.
4. Configuring each patient that you want to have access to the Patient Portal. See *Set up patients (page 27)*.

Checklists are provided at the end of this document so that you can make sure that you have covered all the system administrator setup tasks - see *Checklists (page 56)*.

Email and SMS templates

There are a number of email templates that the Patient Portal uses:

- When you enable patients to use the Patient Portal, they receive a welcome email so that they can log in. See *Welcome email (page 13)*.
- If a patient enters their password incorrectly five times, they receive an email telling them that their account is locked. See *Account locked email (page 14)*.
- If the appointment reminder feature is enabled and defaults to **Email**, patients receive a reminder email. See *Appointment reminder email (page 15)*.

The Patient Portal also uses the following SMS template:

- If the appointment reminder feature is enabled and defaults to **SMS**, patients receive a reminder SMS text message. See *Appointment reminder SMS (page 16)*.

You must ensure that the templates for these emails and SMS messages have been set up before enabling the Patient Portal for individual patients. You can use the default email templates provided by Conductor or you can change them to suit your organization's requirements.

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Welcome email

A welcome email is sent to a patient when their record has the **Allow access to the system** indicator enabled. The welcome email provides a link to the user to set their password so that they can log in to the Patient Portal:

From: help@training3.lumeon.com <help@training3.lumeon.com>
Sent: 22 July 2022 13:20
To: Charlotte Clark <charlotte.clark@gmail.com>
Subject: Welcome to the Lumeon Healthcare Patient Portal!

Dear Ms Charlotte Clark

Welcome to Lumeon Healthcare. Please follow the link below to access our patient portal. You will be prompted to update your password first before accessing the portal to book an appointment or class, fill in forms, and manage your account. Please log in here: https://training3.lumeon.com/set-password?token=MjBBSVJJNEZaM3c2MFRtK29pSitkbkFrVnphVGd5Mm

Kind regards

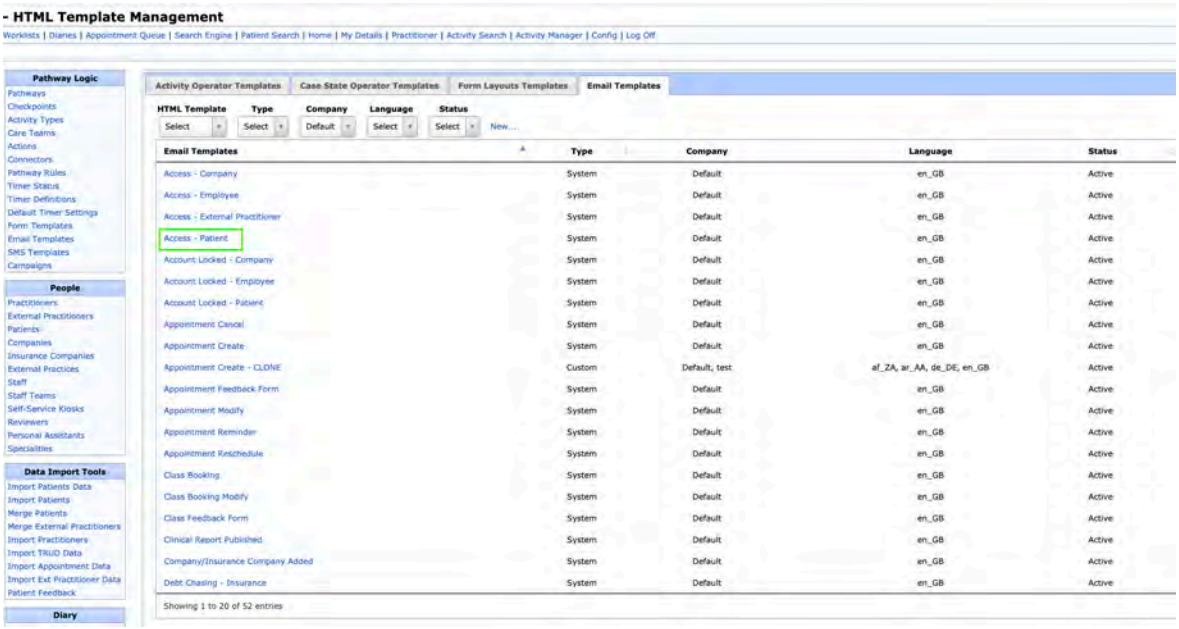
Lumeon Healthcare

View and update the welcome email template

The welcome email uses the **Access – Patient** email template. To view and change the welcome email template:

1. Select **Email Templates** in the **Communication** or **Pathway Logic** menu to display the **HTML Template Management** page.

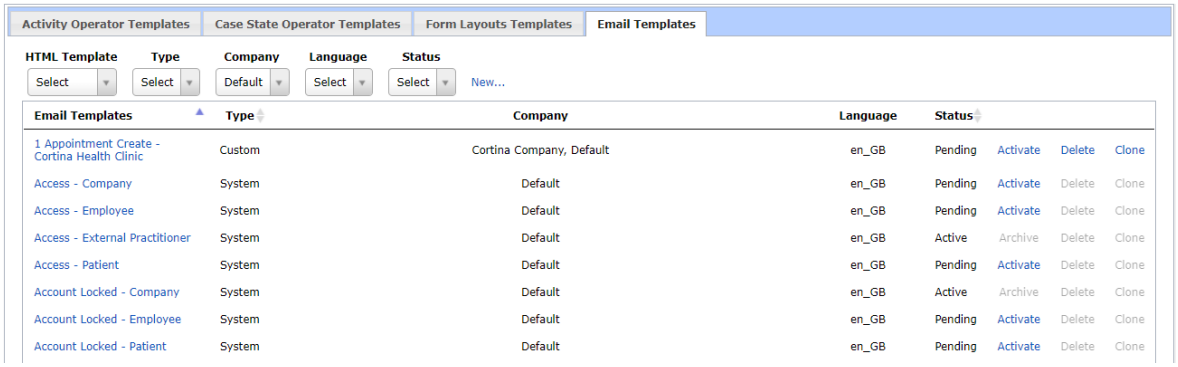
2. Select **Access – Patient** to display the Patient Portal welcome email template:



3. Make any changes to the template that you want and click **Update** in the top left hand corner of the screen.

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4. If you have updated the template, select **Activate** to ensure the template is active:



Account locked email

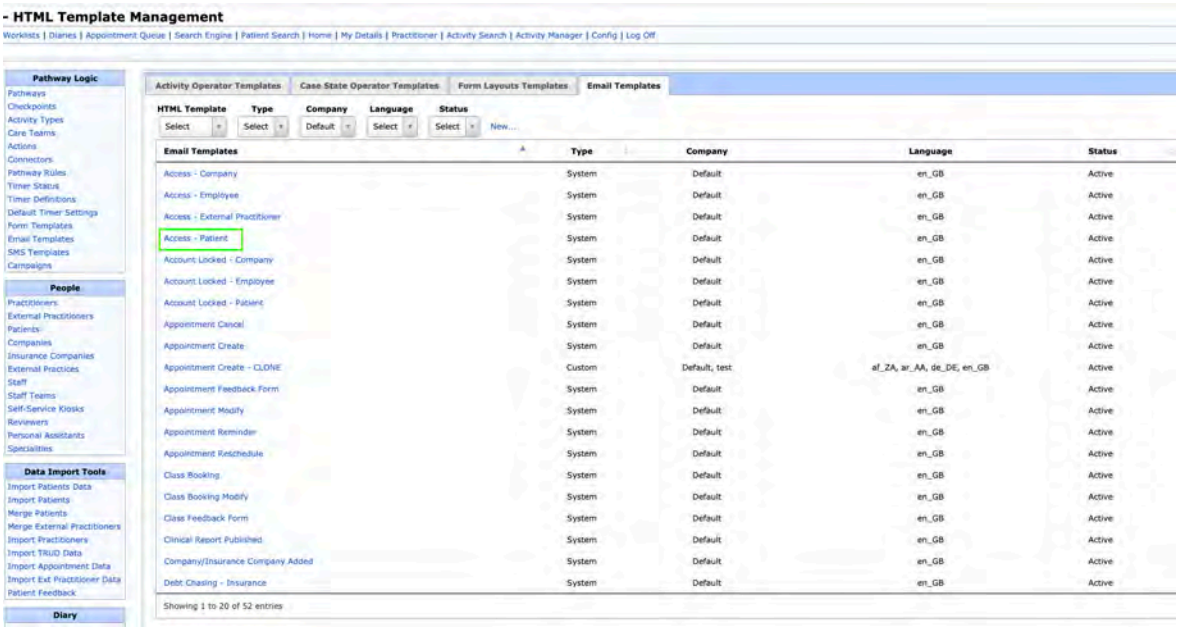
If a patient enters their password incorrectly five times, Conductor sends them an email telling them that their account has been locked.

View and update the account locked email template

The account locked email uses the **Account Locked – Patient** email template. To view and change this email template:

1. Select **Email Templates** in the **Communication** or **Pathway Logic** menu to display the **HTML Template Management** page.

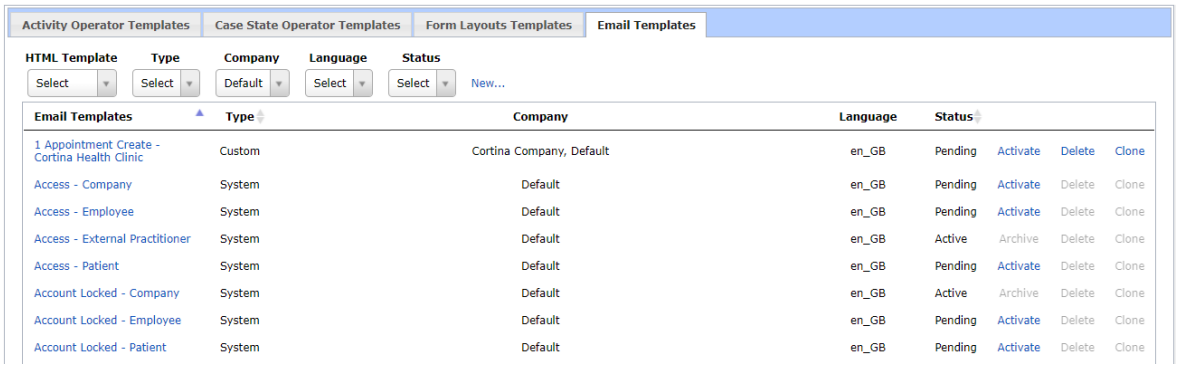
2. Select **Account Locked - Patient** to display the Patient Portal - account locked email template:



3. Make any changes to the template that you want and click **Update** in the top left hand corner of the screen.

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4. If you have updated the template, select **Activate** to ensure the template is active:



Appointment reminder email

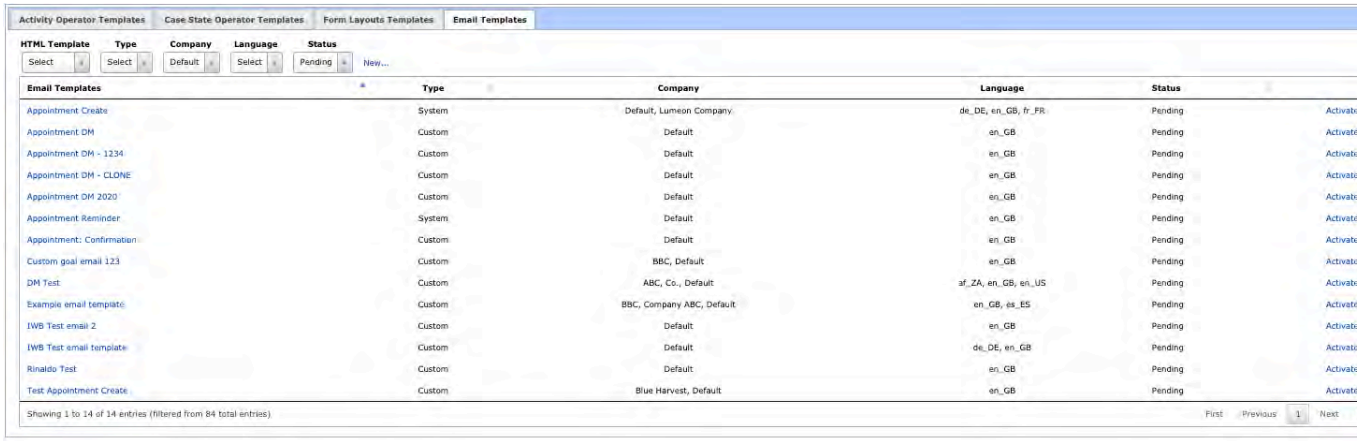
If appointment reminders has been enabled and set to **Email**, Conductor sends patients an SMS message to remind them of their appointment.

See ***Letter & Email Templates in Lumeon Conductor*** for further information on setting up email reminders.

View and update the appointment reminder email template

The appointment reminder email uses the **Appointment Reminder** email template. To view and change this email template:

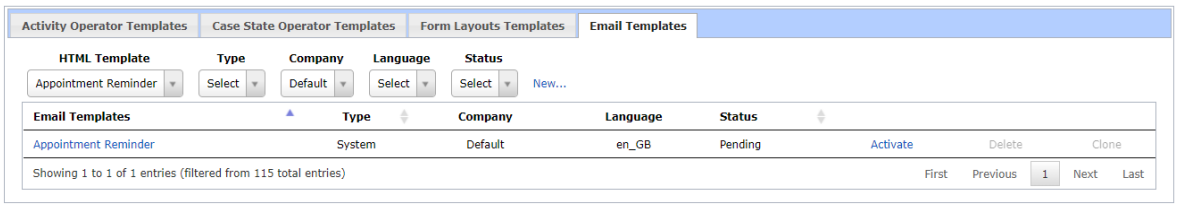
1. Select **Email Templates** in the **Communication** or **Pathway Logic** menu to display the **HTML Template Management** page.



2. Search for and select **Appointment Reminder** to display the email template.

3. Make any changes to the template that you want and click **Update** in the top left hand corner of the screen.

4. If you have updated the template, select **Activate** to ensure the template is active:



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Appointment reminder SMS

If appointment reminders have been enabled and set to **SMS**, Conductor sends patients an SMS message to remind them of their appointment. You must create the SMS template for appointment reminders.

See ***SMS and IVR Messages in Lumeon Conductor*** for further information on setting up SMS reminders.

Create the appointment reminder SMS template

To create the appointment reminder SMS template:

1. Select **SMS & IVR Templates** in the **Communication** or **Pathway Logic** menu to display the **SMS & IVR Templates** page.



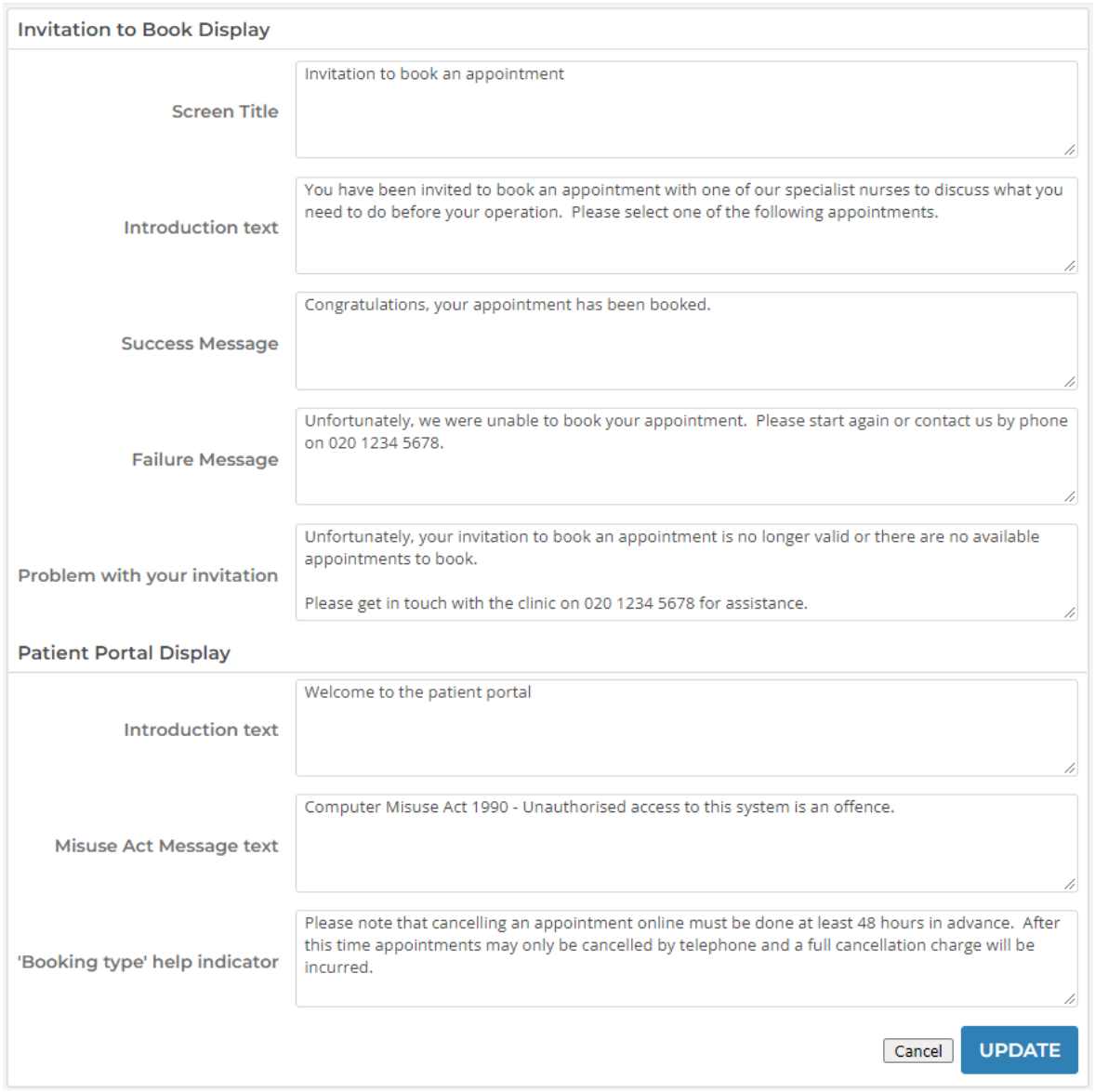
2. Set up the appointment reminder in the **Create New Template** form.
3. Enter the **Name** of the template, say **Appointment Reminder**.
4. Enter the **Type** as **Standard SMS**.
5. Select the language for the SMS appointment reminder template in the **Language** field.
6. Enter the text for the appointment reminder in the **Template** field. As you enter the text, the number of characters appears in the **Length** field.
7. The SMS template is automatically activated and you can update it or delete it.

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Set up Patient Portal display text

Before using the Patient Portal functionality, you must set up how you want it to appear to patients. To do this:

1. Select **Display Text Configuration** in the **System Configuration** menu.
2. Enter the details in the **Patient Portal Display** section using the fields in the table *below (page 18)*.



3. Click **Update** to save your values.

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Patient Portal display fields

Use the following table to complete the details for the Patient Portal display.

These fields define how the screen displays for patients viewing the Patient Portal. The text is the same for all devices so please ensure that they are not too long for displaying on a mobile phone.

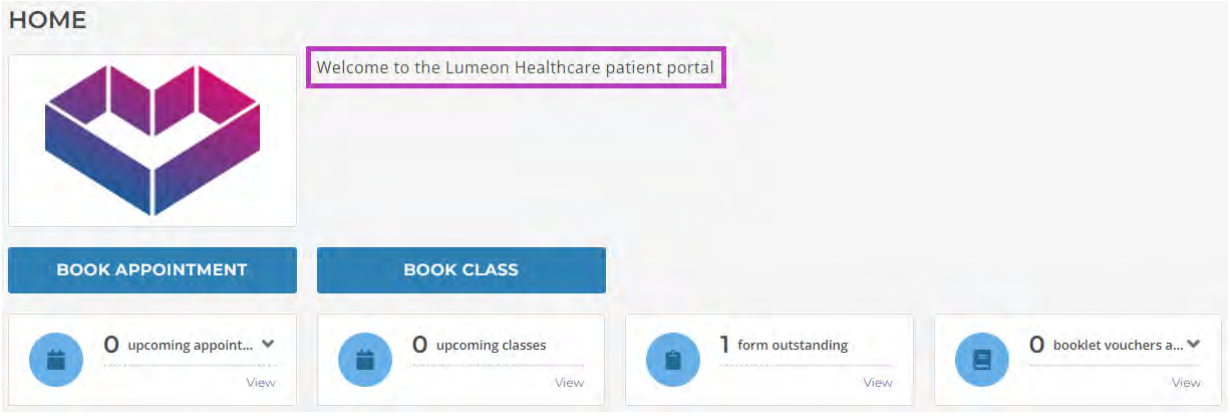
Field	Description
Introduction Text	Enter the introductory text you want to appear on the Patient Portal screen - see *Patient Portal introductory text (page 18)*. For example: `Welcome to the patient portal` The same introductory text displays on both desktop and mobile devices. You should consider the length of text displayed on mobile devices.
Misuse Act Message Text	Enter the Misuse Act that you want to display to all Patient Portal users at the bottom left of the login screen - see *Computer Misuse Act message (page 19)*. For example: `Computer Misuse Act 1990 - Unauthorised access to this system is an offence.`
'Booking Type' Help Indicator	Enter the cancellation policy text that you want to display in step 3 of the appointment booking and class booking wizards. For example: `Please note that cancelling an appointment online must be done at least 48 hours in advance. After this time appointments may only be cancelled by telephone and a full cancellation charge will be incurred.` The same introductory text displays on both desktop and mobile devices. You should consider the length of text displayed on mobile devices.

Patient Portal text fields

The following diagrams show the positions of the text fields on the Patient Portal screens.

Patient Portal introductory text

You can set the introductory home page text that is displayed to patients when they log in to the Patient Portal.

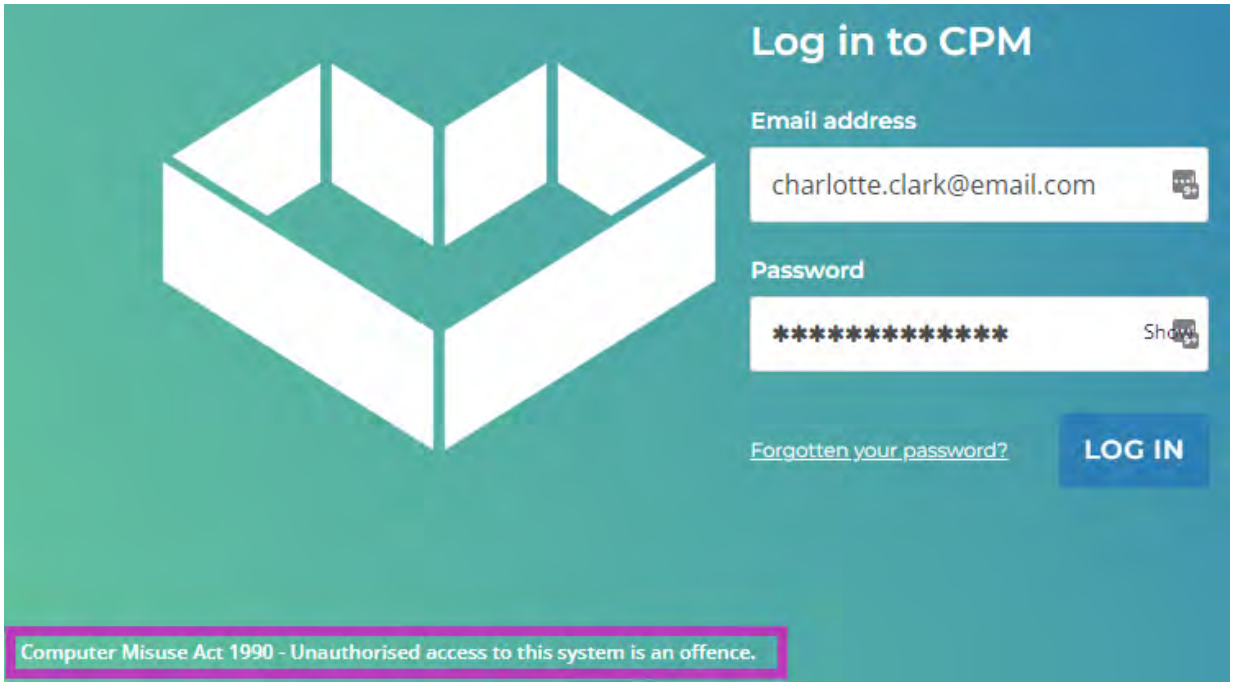


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The same introductory text displays on both desktop and mobile devices. You should consider the length of text displayed on mobile devices.

Computer Misuse Act message

The Computer Misuse Act message is displayed to all Patient Portal users at the bottom left of the login screen.



Other system administrator setup tasks

There are a number of tasks that you may need to perform to ensure that the Patient Portal is set up correctly and completely:

- If security questions have been enabled for the Patient Portal, you should check the default questions and change them if necessary. See *Set up security questions (page 20)*.
- If this is a new implementation of Lumeon Conductor, you may need to:
  - *Set up appointment types (page 21)*.
  - *Set up classes (page 23)*.
  - *Set up booklets (page 23)*.
  - *Set up patient forms (page 24)*.
  - Set up or check the cancellation policy - see *Cancellation policy (page 25)*.
  - Set up reasons for cancelling an appointment - see *Set up cancellation reasons (page 27)*.

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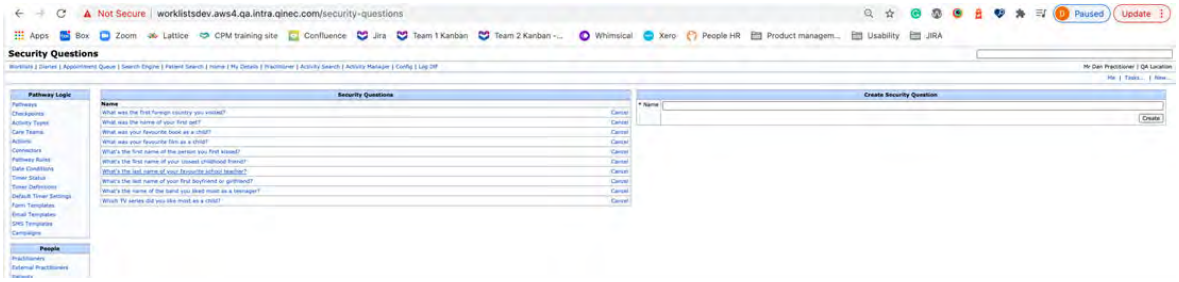
Set up security questions

If have enabled security questions for Patient Portal users, the default set of ten security questions are available. You may want to add new questions or delete existing ones.

To set up security questions:

1. Select the **Security Questions** option in the **System Configuration** menu.

   A list of security questions is displayed:



2. To add a new security question, enter the question in the **Name** field in the **Create Security Questions** form and click **Create**.

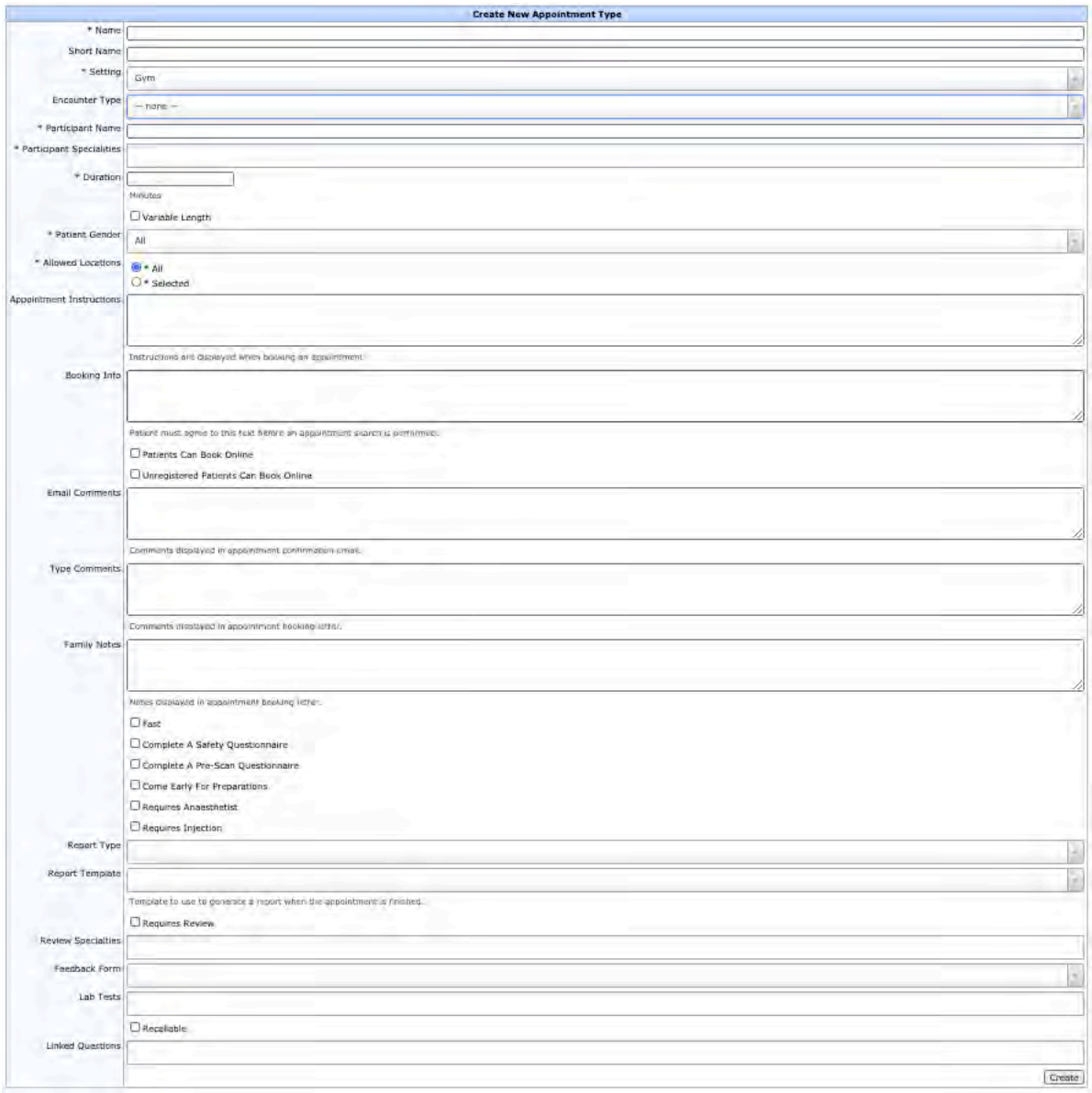
3. To delete a security question, click **Cancel** next to it.

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Set up appointment types

You must set up the appointment types that will be used in the Patient Portal.

You can create and manage appointments in **Appointment Types** in the **Diary** menu:



Appointment type fields

The following fields are relevant for appointment configuration for the Patient Portal:

Appointment field	Impact on Patient Portal
Patient Gender	Appointment can be set to male only, female only or all.
Allowed Locations	The locations where the appointment can take place.
Appointment Instructions	Appointment specific information that needs to be relayed from the booking agent to the patient. This information displays on the booking screen.

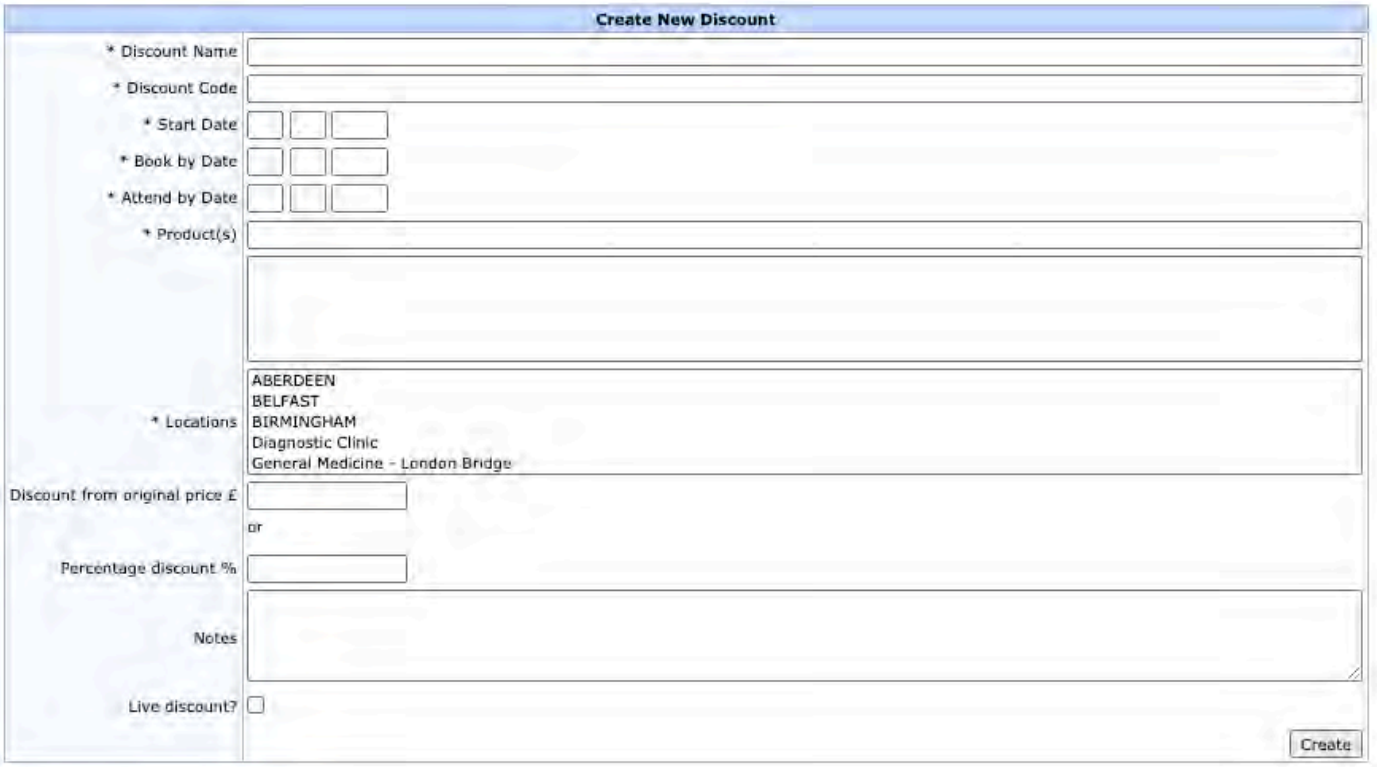
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Appointment field	Impact on Patient Portal
Booking Info	Text entered here appears in the patient portal. The patient must agree to comments before the appointment is booked. The text entered here can also appear in the booking confirmation email. Use the following merge tags in the email template: `<<appointment_type_booking_information>>`
Patients Can Book Online	Enables patients to book the appointment through the patient portal.
Email Comments	Text entered here appears in the appointment booking confirmation email. Use the following merge tags in the email template: `<<appointment_type_comments>>`

Come Early for Preparations,
 	
Requires Injection
	Text entered here appears in the appointment booking confirmation email.
	
	Use the following merge tags in the email template:
	
	`<<appointment_type_come_early_for_preparations>>`
	
	`<<appointment_type_requires_injection>>`

Discounts

You can apply discounts to appointments in **Manage Discounts** in the **Discounts** menu:



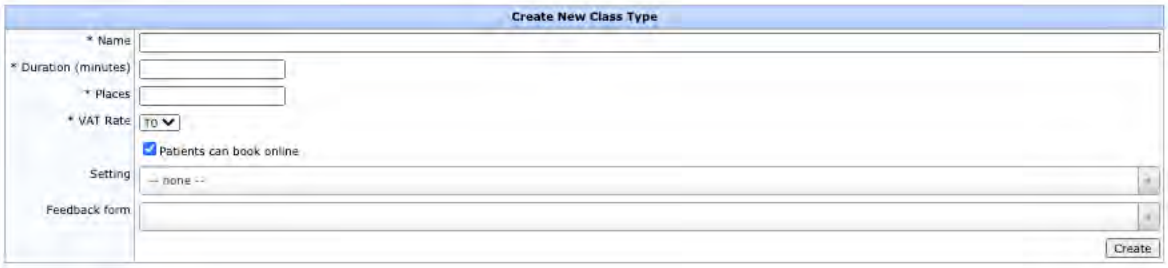
See ***Discounts in Lumeon Conductor*** for further information on setting up discount codes.

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Set up classes

You must set up the classes that patients can book in the Patient Portal.

You can create and manage classes in **Class Types** in the **Diary** menu:



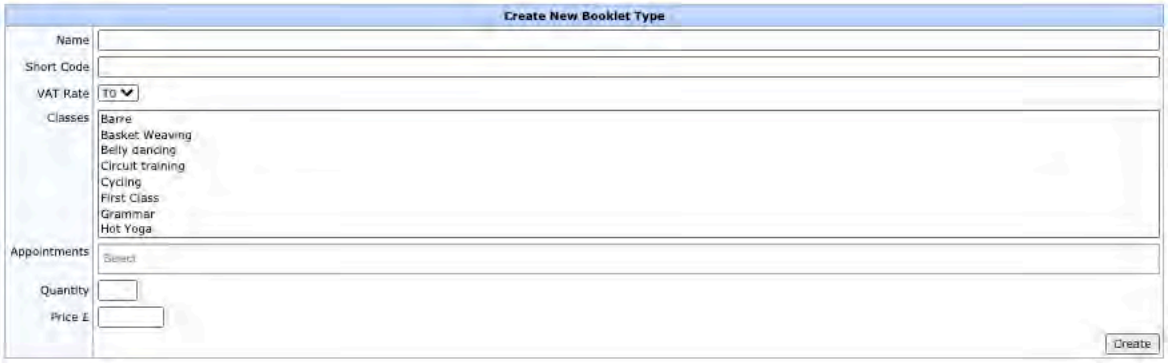
The following fields are relevant for class configuration for the Patient Portal:

Class field	Impact on Patient Portal
Patients can book online	Select this check box to enable patients to book classes through the Patient Portal.

Set up booklets

You must set up the booklets that patients can use in the Patient Portal.

You can create and manage booklets in **Booklets** in the **Products** menu:



The following fields are relevant for booklet configuration for the Patient Portal:

Booklet field	Impact on Patient Portal
Classes	List of available class types.
Quantity	Number of bookings available in the booklet.

Once the booklet has been created, you must add it to a contract using the **Add Product Wizard** in **Wizards** in the **Products** menu.

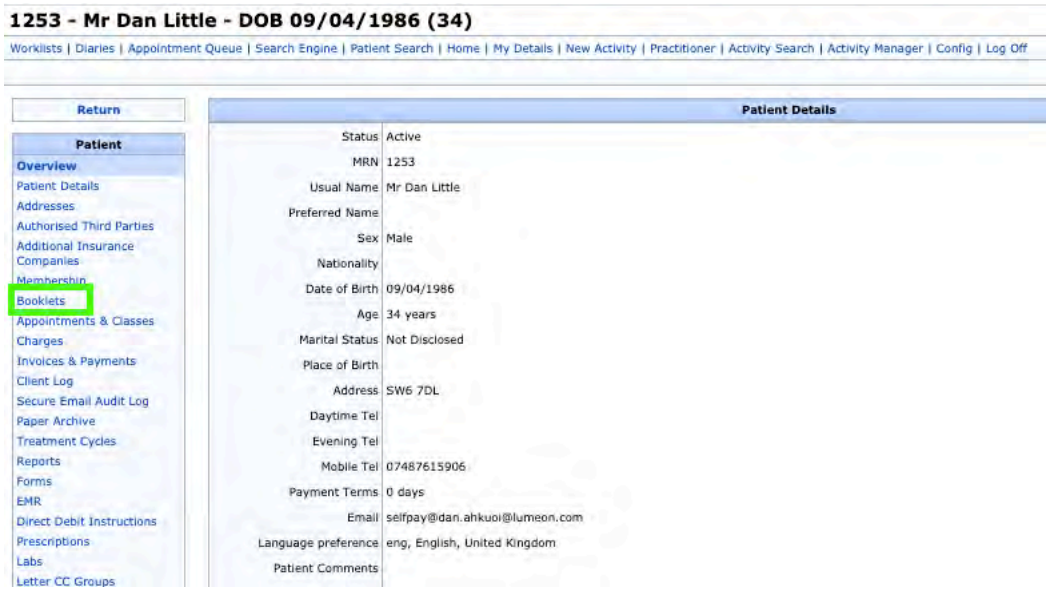
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Add a booklet to a patient's account

Once a booklet has been created, you must added it to the patient's account once purchased so that the patient can use it to book classes or appointments.

To add a booklet to a patient's account:

1. Search for the patient and display their details.
2. Select **Booklets** in the **Patient** menu.



A booklet is not displayed if:

- It is locked.
- The remaining quantity is zero.
- It is only associated with appointment types that are not available for online booking.
- It is only associated with products that are not linked to a pricing policy.

Set up patient forms

If your organization wants patients to view and fill in forms within the patient portal, you must set up the questions and forms. See ***Forms in Lumeon Conductor*** for details on how to set up questions and forms.

The following fields are relevant for displaying forms in the Patient Portal:

Form field	Impact on Patient Portal
Patient form	Select this check box to enable the form to be available for patients to view and fill in through the Patient Portal.

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Cancellation policy

The cancellation policy specifies how much a patient is charged for cancelling their appointment or class within a particular time frame. Cancellation policy rules can be set to depend on eligibility levels, age, or sex of a patient.

For example, you could create a cancellation policy rule that states that if a patient cancels an appointment:

- Within 24 hours, they are charged the full price of the appointment.
- Between 24-48 hours, they are charged half the price of the appointment.
- More than 48 hours before the appointment, there is no cancellation charge.

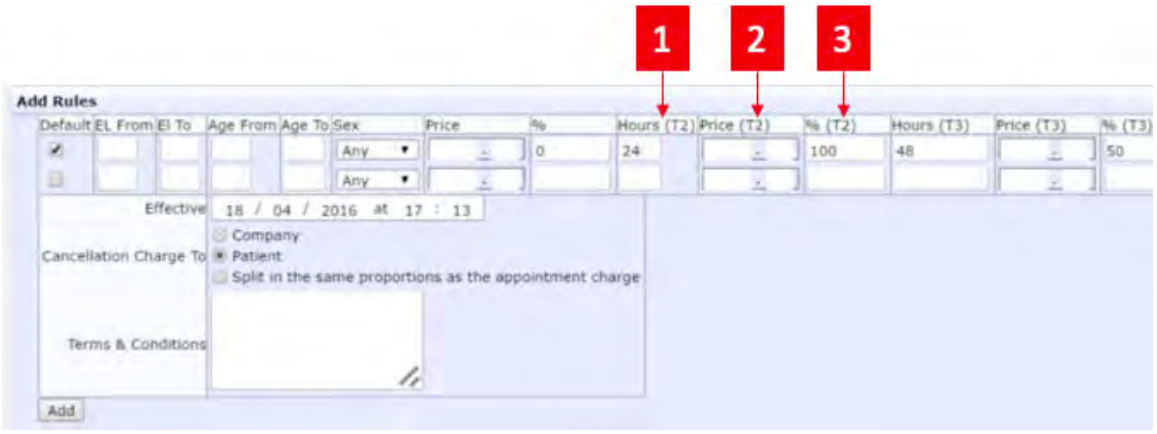
View a cancellation policy

To view a cancellation policy:

1. Select **Contracts** in the **Products** menu.
2. Click **+** next to **Contracts** to display a list of contracts.
3. Click **+** next to the contract whose cancellation policy you want to view, and click **Available Products**.
4. Select the product whose cancellation policy you want to view, and click **Cancellation Policy**.

Cancellation fee

The cancellation policy can specify either a flat fee or a percentage of the appointment cost. The cancellation fee can be applied in different tiers. For example, tier 1 cancellation within 48 hours of the appointment, and tier 2 within 24 hours of the appointment.



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The following table outlines the cancellation fee attributes for tier 2:

Number	Cancellation policy attribute	Description
1	Hours for Tier 2 cancellation fee	Number of hours before the appointment cancellation is made which incurs a cancellation fee.
2	Flat fee for Tier 2 cancellation fee	A flat cancellation fee that is charged if the patient cancels within the hours specified in attribute 1.
3	Percentage of appointment cost	Percentage of appointment or class cost that is charged if the patient cancels within the hours specified in attribute 1.

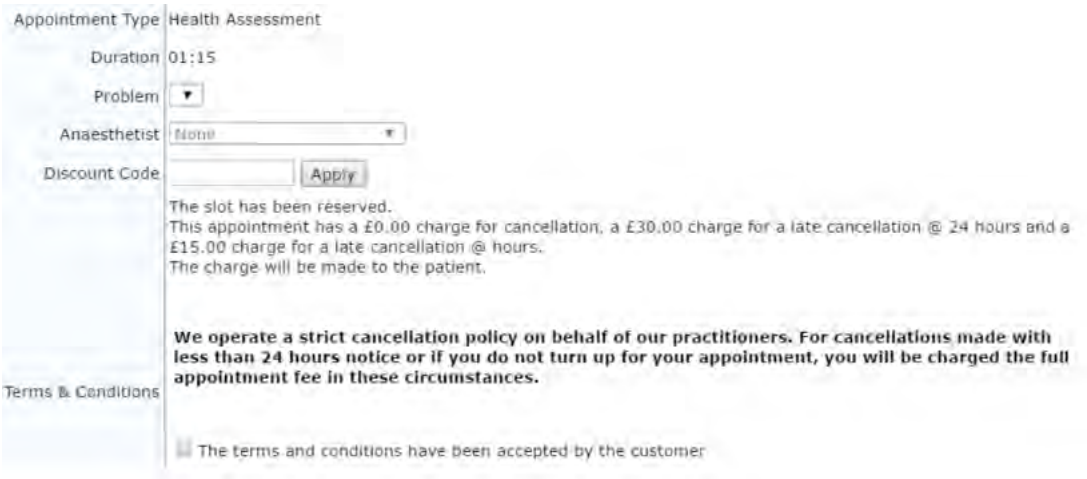
The cancellation costs are visible on the appointment booking page.

Cancellation policies can be configured to take into account weekends and bank holidays.

The cancellation charge can either be expensed to the patient, the company, or can be split in the same proportions as the appointment charge, if a co-payment policy has been set up.

Terms and conditions

Complete the **Terms & Conditions** to display them on the booking page, where the user is required to select a checkbox to confirm they have read the terms and conditions to the patient before the appointment can be booked.

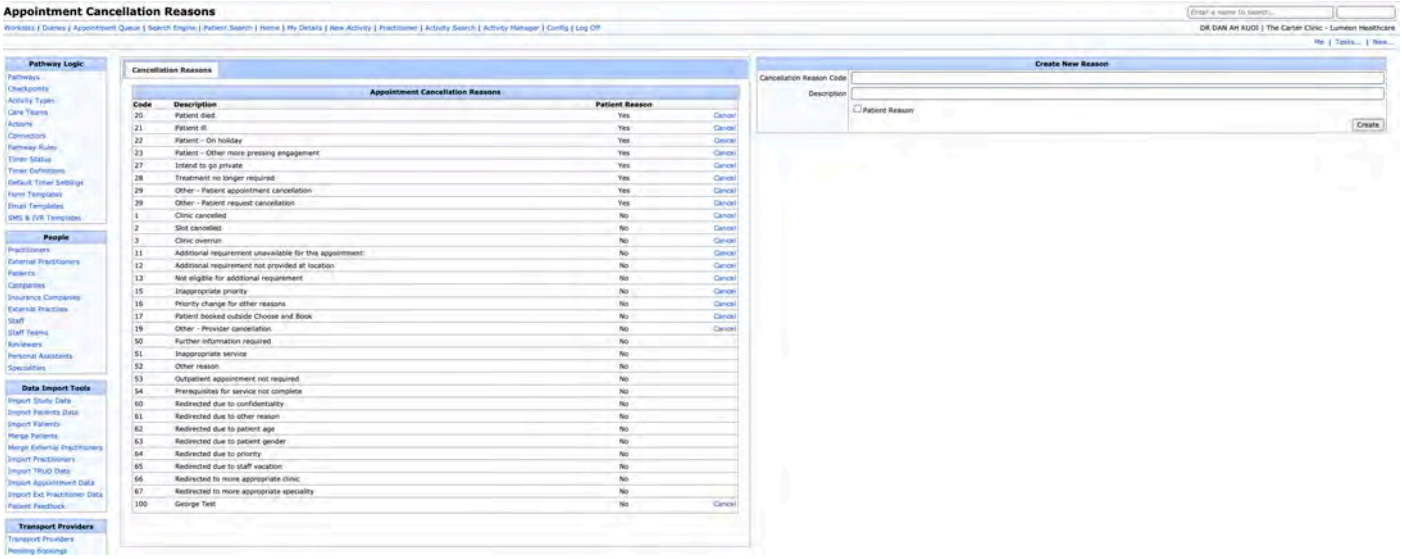


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Set up cancellation reasons

Patients can cancel appointments and classes from the **Diary** screen in the Patient Portal. You must set up the cancellation reasons that patients can select from the drop-down list when they cancel an appointment or a class.

Use **Appt Cancel Reasons** in the **Runtime Options** menu to set up the cancellation reasons.



Set up patients

You must make the following changes to patients in Conductor before they can access the Patient Portal. The following three patient record details must be set:

Patient record attribute	Description	Details
Email address	Used by the patient for login.	To view or set up a patient's email address, see *Patient email address for login (page 30)*. To create and run a report of all patients and whether they have an email address and mobile number on their record, see *Patient record reporting (page 28)*.
Mobile number	Used for Two Factor Authentication (2FA) via SMS.	To view or set up a patient's mobile number, see *Patient mobile number (page 31)*. To create and run a report of all patients and whether they have an email address and mobile number on their record, see *Patient record reporting (page 28)*.
Allow access to the system indicator	Enables the patient to access the Patient Portal.	To enable access to the Patient Portal, see *Enable patients to access the Patient Portal (page 32)*. To ensure that patients receive a welcome email, see *Welcome email (page 13)*.

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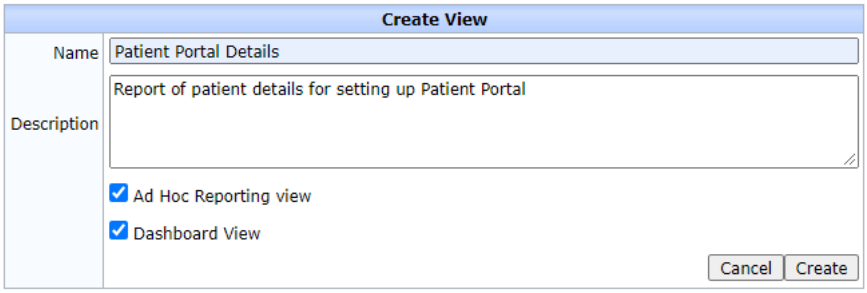
Patient record reporting

It is important to understand the patient record quality before starting to set up the Patient Portal. For example, if only a small number of patients have an email address recorded, patients must be contacted to provide their emails so that they can log in to the Patient Portal.

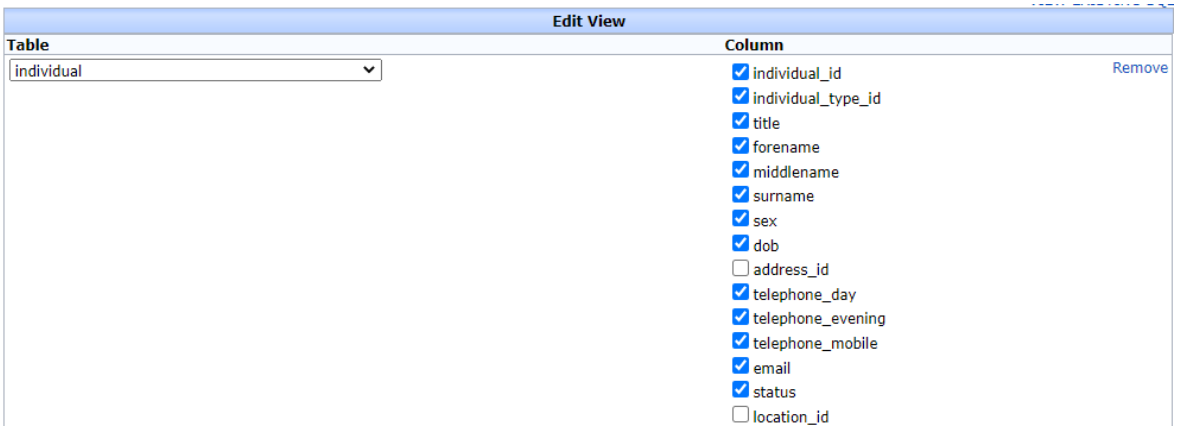
Create a report of patient email addresses

You can run a report to determine patient email addresses:

1. Select **Ad-hoc Reporting Views** in the **Accounting** menu.
2. Create a report view in the **Create View** table and click **Create**.



3. Select the report view in the **Views** list.
4. In the **Edit View** form, select **individual** from the drop-down list in the **Table** field. A list of the columns in the **individual** table is displayed.
5. Select the columns that you want to include in your report. For example, you should include enough information to identify the patient and you should include the email and mobile number columns. Scroll to the bottom of the screen and click **Save**.



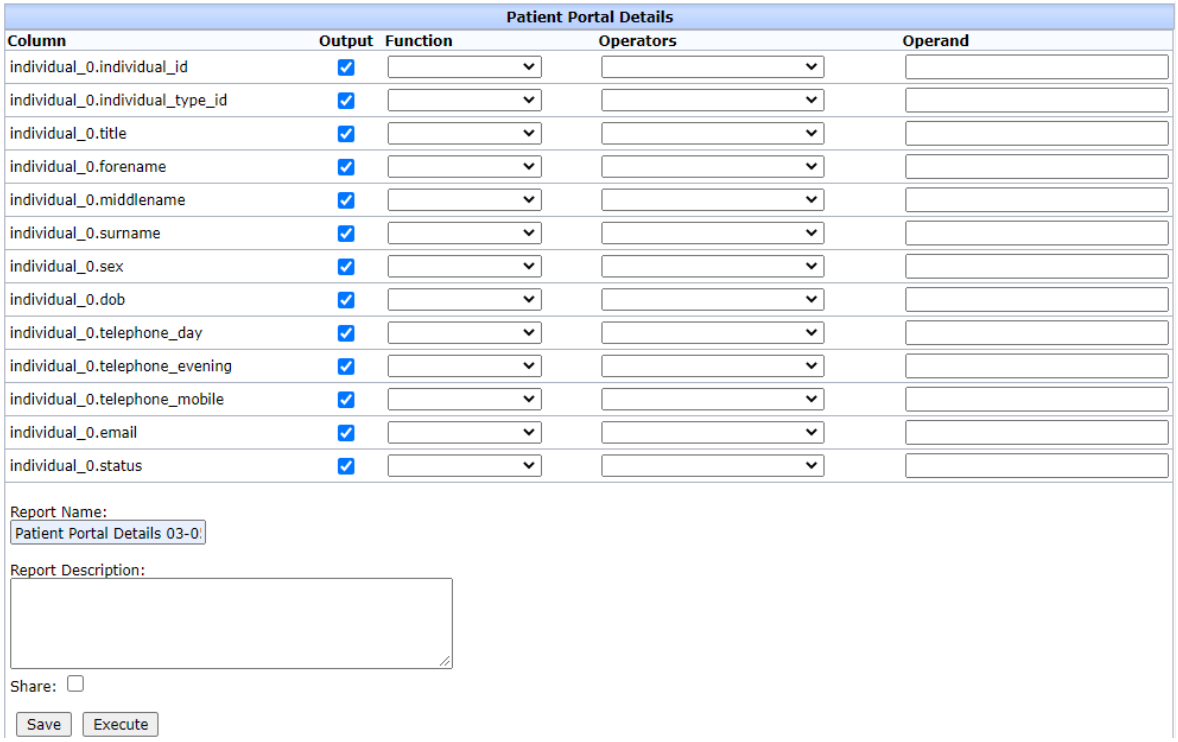
Run a report of patient emails and mobiles

You can run a report to determine patient email addresses and mobile numbers:

1. Select **Ad-hoc Reporting** in the **Accounting** menu.

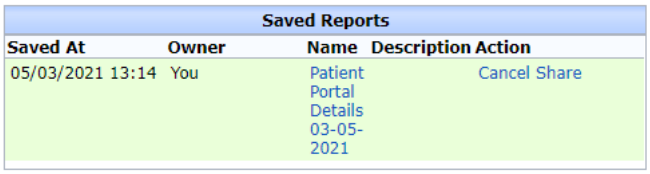
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2. Select the report view you have created in the **Views** list. The report view details display below the list:



3. Enter a report name and, optionally, a report description.

4. Click **Save** to save the report in the **Saved Reports** list so that you can run it later.



5. Click **Execute** to run the report and save it as a CSV file.

You can use the report to establish how many of your patients have email addresses and mobile numbers so that those without can be contacted and their details can be updated.

Run a query of Patient Portal access indicators

There is currently no report that you can run from Conductor to extract the **Allow access to the system** indicator for patients.

Contact Lumeon Support if you want us to run a query to extract this information.

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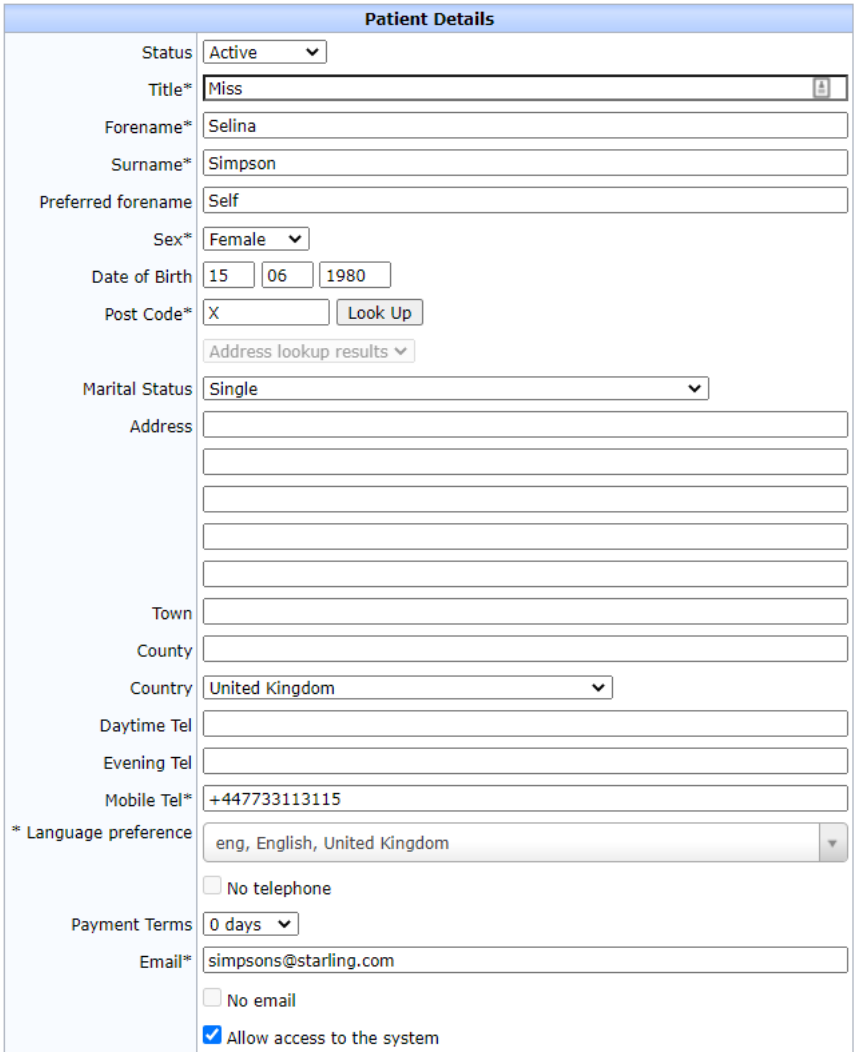
Patient email address for login

Patients receive a welcome email so that they can sign in to the Patient Portal for the first time, and they use their email address to log in to the Patient Portal, so they must have an email in their patient record before they are enabled to use the Patient Portal.

View and enter a patient email address

To check whether a patient has an email in their patient record:

1. Select **Patient Search** in the **Admin** menu or in the menu bar, and search for the patient.
2. Select **Patient Details** in the **Patient** menu.
3. Enter an email address if it is not present, and click **Update**.



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Patient mobile number

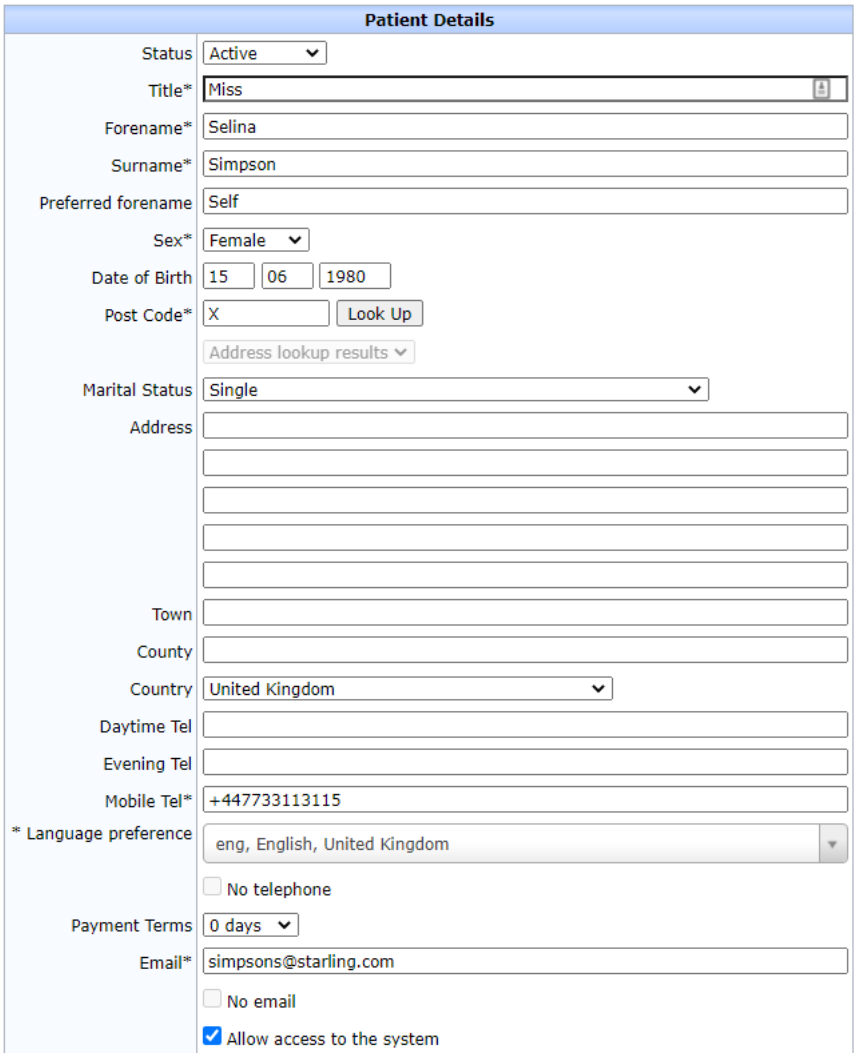
If appointment reminders are enabled and set to SMS, then you must ensure that patients have their mobile number recorded, because they need to receive an SMS to remind them of their appointment.

Similarly, if two factor Authentication (2FA) is enabled for SMS, then patients must have their mobile number recorded, because they need to receive an SMS as the second authentication method.

View and enter a patient mobile number

To check whether a patient has a mobile number in their patient record:

1. Select **Patient Search** in the **Admin** menu or in the menu bar, and search for the patient.
2. Select **Patient Details** in the **Patient** menu.
3. Enter a mobile number if it is not present, and click **Update**.



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Enable patients to access the Patient Portal

You must enable the **Allow access to the system** indicator to allow patients to access the Patient Portal.

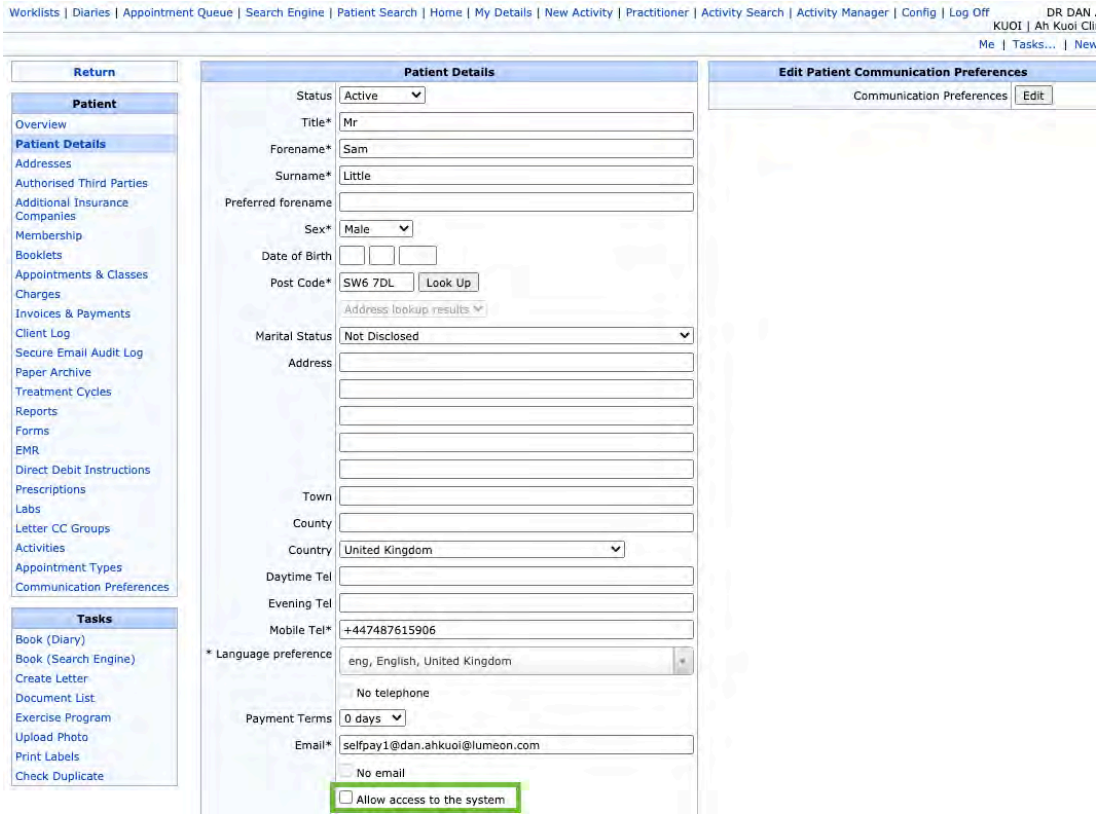
Enable access to the Patient Portal

To enable access to the Patient Portal:

1. Select **Patient Search** in the **Admin** menu or in the menu bar, and search for the patient.

2. Select **Patient Details** in the **Patient** menu.

3. Select **Allow access to the system** if it is not selected, and click **Update**. The patient now has access to the Patient Portal.



Existing patients

For existing patients, some patients may have the **Allow access to the system** indicator enabled and others may have it disabled. The following table outlines how existing patients should be handled:

Patients	Allow access to the system indicator	Description	Solution
Existing	Disabled	Patient has never received a welcome email therefore they cannot log into the Patient Portal.	Enable the **Allow access to the system** indicator which sends the welcome email to the patient.

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Patients	Allow access to the system indicator	Description	Solution
Existing	Enabled	Patient has received a welcome email when the indicator was enabled but are unlikely to have set up a password and logged in.	There are two steps to ensure the patient receives a welcome email: 1. Clear **Allow access to the system** and click **Update**. 2. Select **Allow access to the system** and click **Update**.

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Key features of the Patient Portal

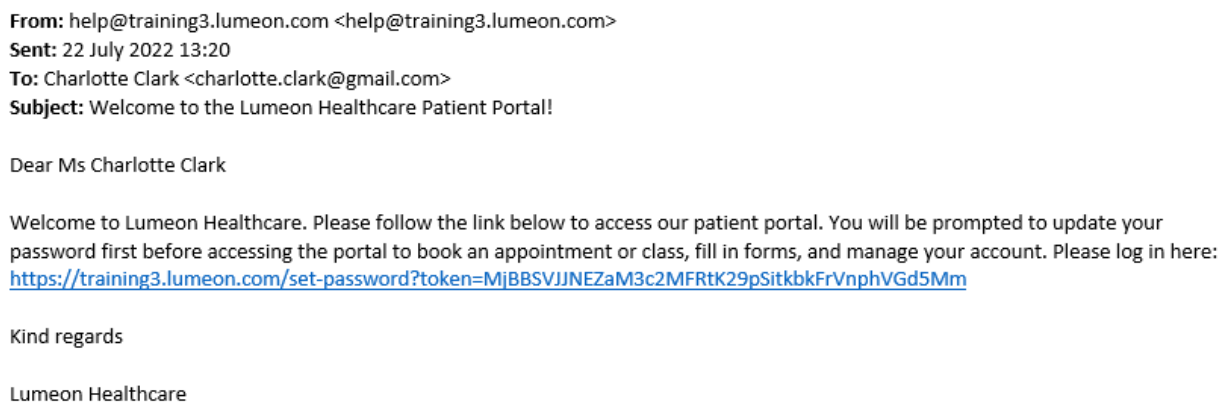
The following sections describe the key features of the Patient Portal:

- *Welcome email (page 34)*
- *Patient login (page 35)*
- *Home screen (page 36)*
- *Appointments (page 38)*
- *Classes (page 43)*
- *Diary (page 47)*
- *Forms (page 50)*
- *Booklets (page 52)*
- *My details (page 53)*
- *Patient logout (page 54)*

The Patient Portal is available on a wide range of browsers on both computers and mobile devices. See *Browsers supported by the Patient Portal (page 54)*.

Welcome email

When a patient is given access to the Patient Portal, they receive a welcome email inviting them to set up a password and log into the Patient Portal.



From: help@training3.lumeon.com <help@training3.lumeon.com>
Sent: 22 July 2022 13:20
To: Charlotte Clark <charlotte.clark@gmail.com>
Subject: Welcome to the Lumeon Healthcare Patient Portal!

Dear Ms Charlotte Clark

Welcome to Lumeon Healthcare. Please follow the link below to access our patient portal. You will be prompted to update your password first before accessing the portal to book an appointment or class, fill in forms, and manage your account. Please log in here: https://training3.lumeon.com/set-password?token=MjBBSVJJNEZaM3c2MFRtK29pSitkbkFrVnphVGd5Mm

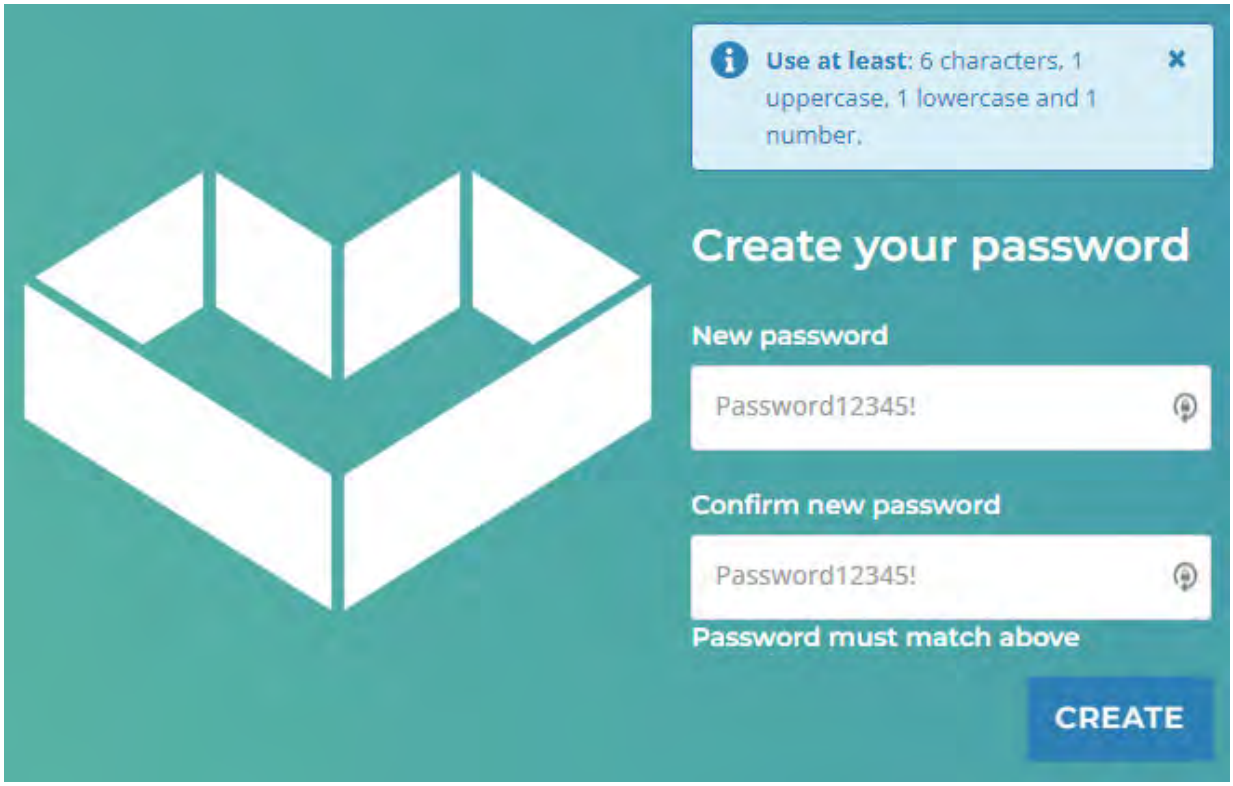
Kind regards

Lumeon Healthcare

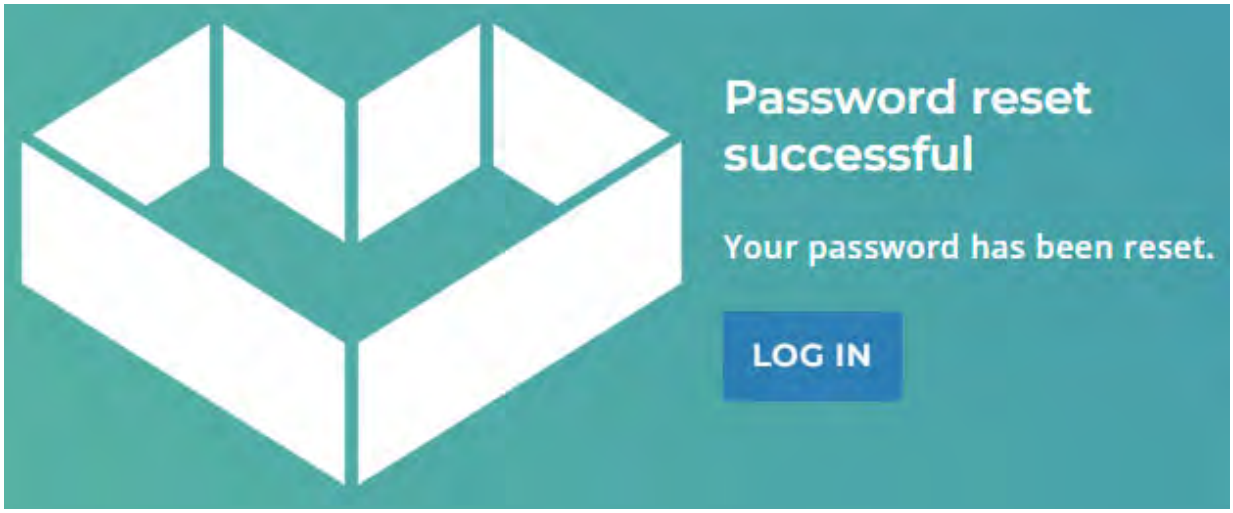
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Patient login

When the patient clicks on the link in the welcome email, they must enter a new password, confirm it, and click **Create**.

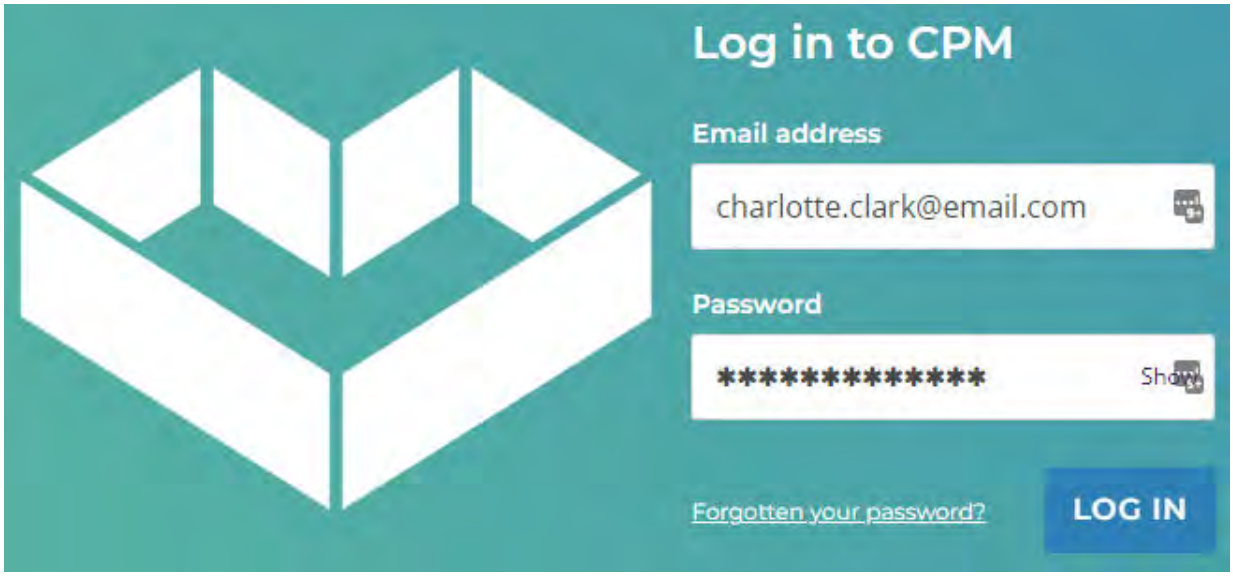


The patient can then click **Log in** to display the login screen.



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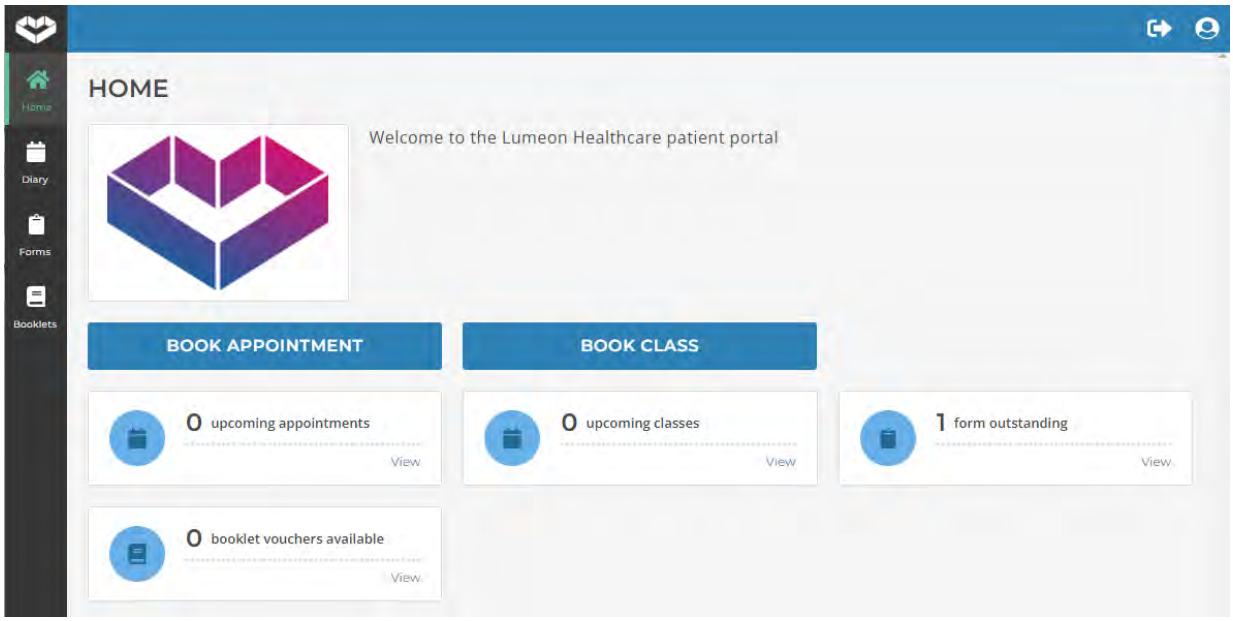
The patient enters their email, new password and clicks **Log in**.



The Home screen of the Patient Portal displays for the patient.

Home screen

The home screen is the first screen that users see when they log into the Patient Portal. It contains welcome text, options to book appointments and classes, and a dashboard of upcoming events and booklets available.



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The default Patient Portal configuration contains four menu options:

- Home
- Diary
- Forms
- Booklets

The default Patient Portal configuration enables users to:

- Book an appointment
- Book a class
- View a form and fill it in
- Manage booklets
- View their details

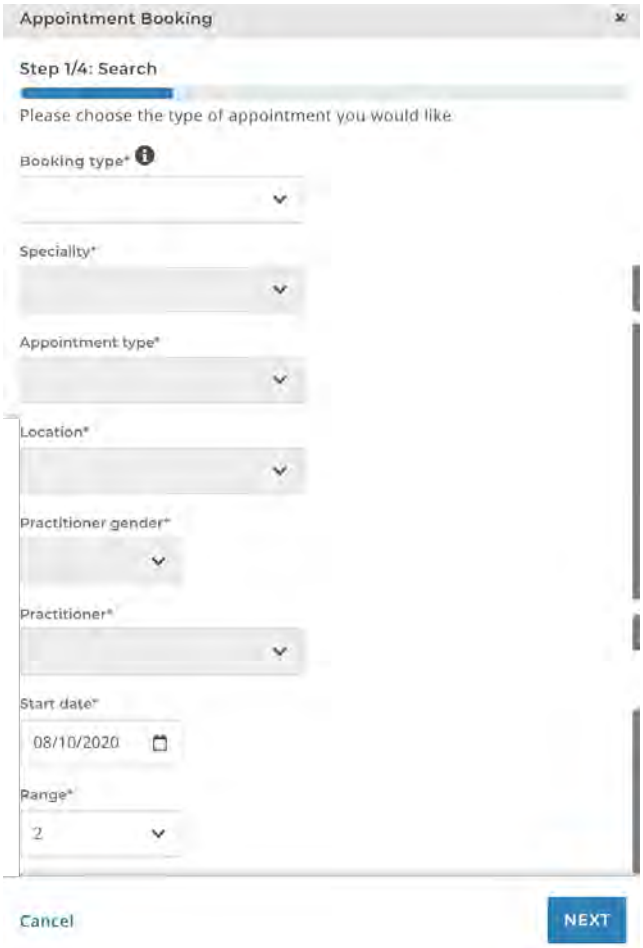
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Appointments

Patient Portal users can book appointments using the **Book Appointments** option on the **Home** page. The appointment booking wizard provides a simple way for patients to search for and book appointments in the Patient Portal.

Appointment booking wizard – step 1

Step 1 of the appointment booking wizard allows users to define all search criteria for their required appointment.



The **Booking Type** field drives the values populated in the subsequent fields. There are four booking types available for selection:

Booking type selected	Description
Booklet	Displays all booklets with available vouchers if: · they are associated with appointment types which can be booked online, and · they are linked to a contract which has an associated pricing policy, and · the core configuration parameter is enabled that allows patients to book appointments using booklets.

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Booking type selected	Description
Company	Displays an associated company contract which: · is associated with appointment types which can be booked online, and · has a pricing policy, and · has the **Allow employee bookings** indicator set to **True**.
Insurance	Displays an associated insurance contract which: · is associated with appointment types which can be booked online, and · has a pricing policy.
Contract	Displays the patient's associated contract (e.g. default is Private) where: · appointment types can be booked online, and · is linked to a pricing policy.

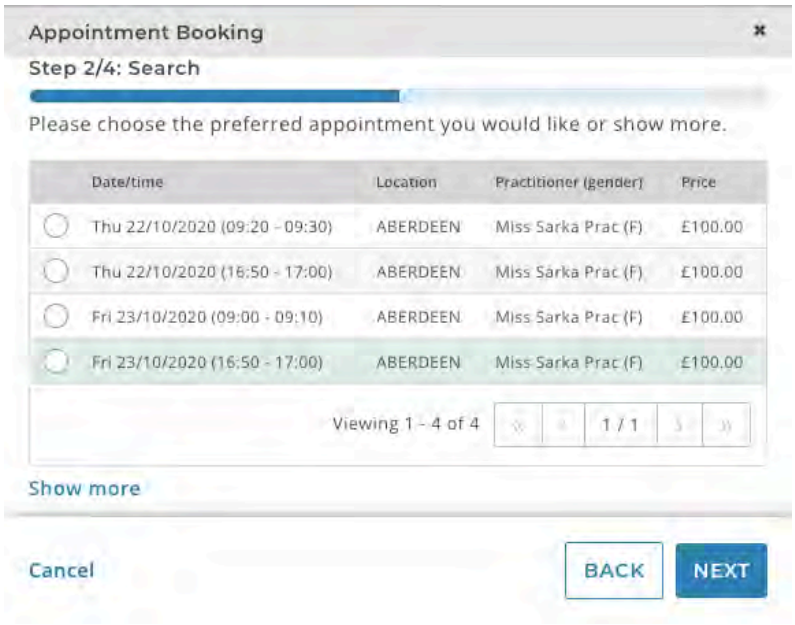
All subsequent fields are driven by the **Booking Type** field:

Field	Booking type selected	Impact
Specialty	Booklet	Displays every specialty that is linked to the booklet, and can be booked online by the patient.
	Company	Displays every specialty listed in their contact which can be booked online by the patient.
	Insurance	Displays every specialty listed in their contract which can be booked online by the patient.
	Contract	Displays every specialty listed in their contract which can be booked online by the patient.
Appointment Type	N/A	Displays the valid appointment types that the patient is eligible for and can book online, based on the booking type and specialty selected.
Location	Booklet	Displays the allowed locations as listed against that patient's application of the booklet.
	Not booklet	If the booking type is not a booklet, displays: · **Any location** - This is the first item and is the default selection when the control is refreshed or cleared. · All locations in the selected appointment type's allowed locations.
Practitioner gender	N/A	Lists all available genders.
Practitioner	N/A	Displays **Any practitioner** by default and also a list of relevant practitioners based on the patient's selection of appointment type, specialty, and gender.

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Appointment booking wizard – step 2

Step 2 of the appointment booking wizard provides patients with the available appointment options based on their search criteria.



The price is only displayed when the booking type is private.

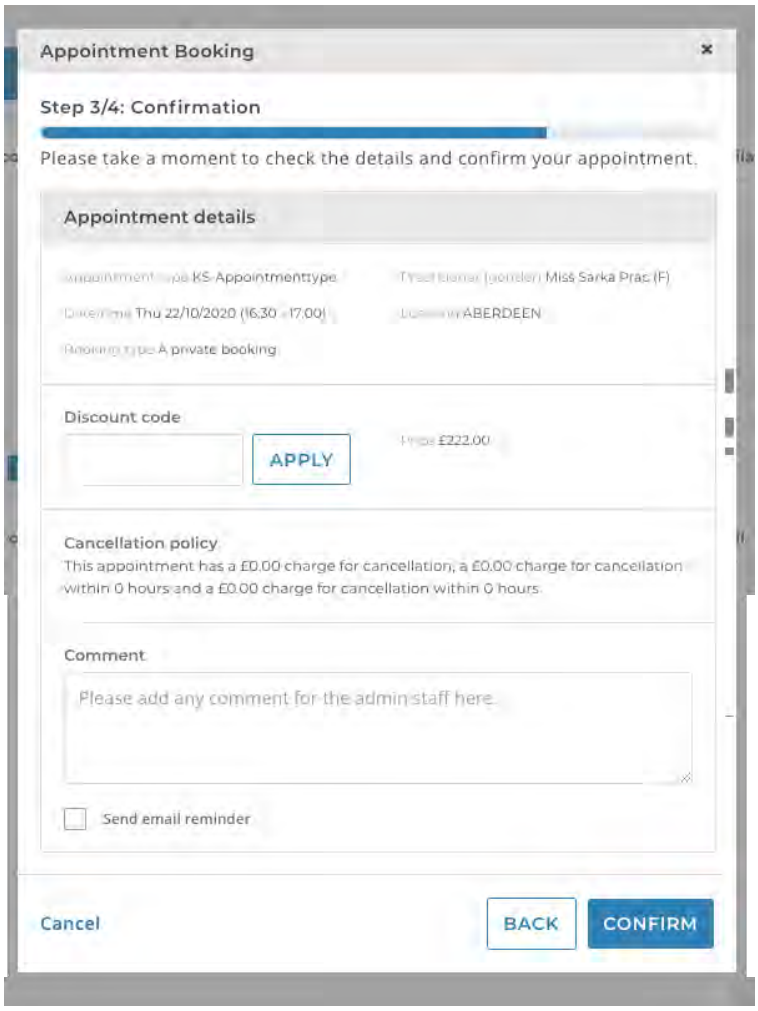
Conductor optimizes the search results to display fewer appointment results, based on the practitioners' diary availability.

The optimization is controlled by a configuration parameter. Contact Lumeon Support if you would like patients to see an option to display more appointment results.

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Appointment booking wizard – step 3

Step 3 of the appointment booking wizard allows patients to review booking details and apply a discount code.



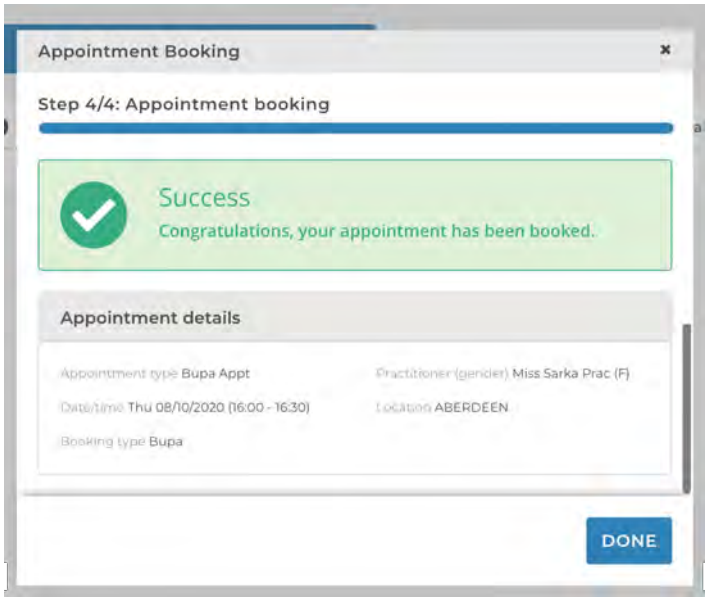
The following fields may or may not appear depending on the Patient Portal configuration:

Field	Description
Discount code	Patients can only apply for a discount if: · discounts are enabled for the appointment type, and · the booking type is private, and · a discount exists.
Send email reminder	The option to send an email reminder is only displayed if: · the patient has consented to receive email reminders, and · the patient has an email address recorded.
Send SMS reminder	The option to send an SMS reminder is only displayed if: · the patient has consented to SMS reminders and · the patient has a mobile number recorded.

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Appointment booking wizard – step 4

Step 4 of the appointment booking wizard is a confirmation screen.



If an error occurs while booking an appointment in step 4, the patient is given the option to start again and all search criteria is saved.

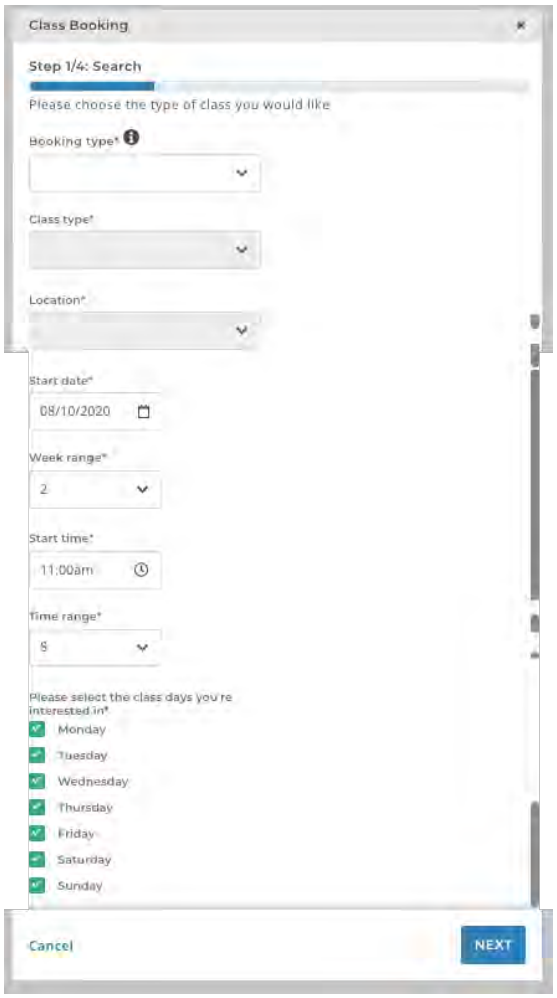
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Classes

Patient Portal users can book classes using the **Book Classes** option on the **Home** page. The class booking wizard provides a simple way for patients to search for and book classes in the Patient Portal.

Class booking wizard – step 1

Step 1 of the class booking wizard allows users to define all search criteria for their required appointment.



The **Booking Type** selected drives the values populated in the subsequent fields. There are four booking types available for selection:

Booking type selected	Description
Booklet	All booklets with available vouchers which: · are associated with class types which can be booked online, and · have a contract which has an associated pricing policy.

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Booking type selected	Description
Company	Displays an associated company contract which: · is associated with class types which can be booked online, and · has a pricing policy, and · has **Allow employee bookings** set to `True`.
Insurance	Displays an associated insurance contract which: · is associated with class types which can be booked online, and · has a pricing policy.
Contract	Displays the patient's associated contract (e.g. default is Private) where: · class types can be booked online, and · is linked to a pricing policy.

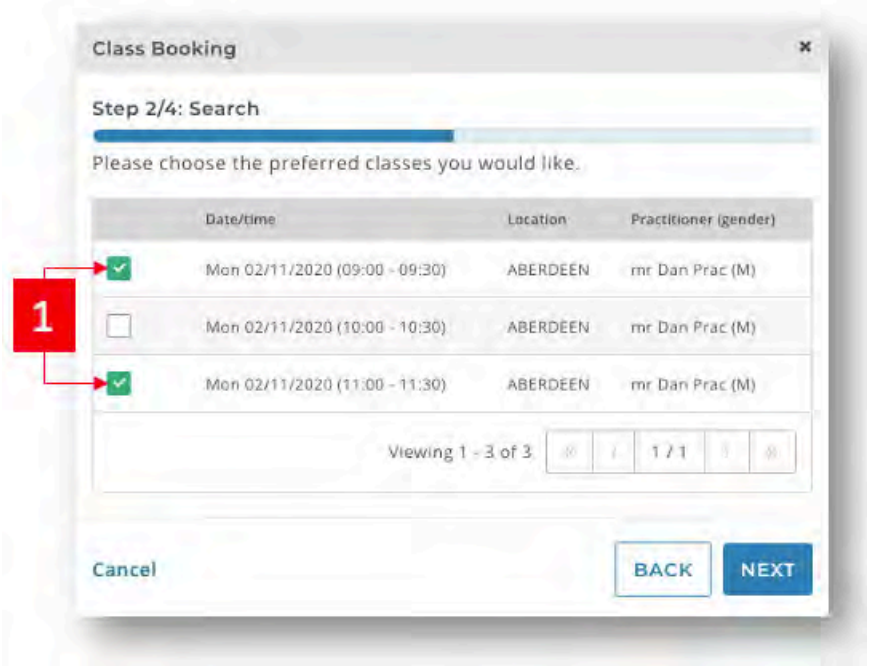
All subsequent fields are driven from the booking type field:

Field	Booking type selected	Impact
Class type	Booklet	Displays the classes associated to the selected Booklet.
	Company	Displays every class listed in their contract which can be booked online by the patient.
	Insurance	Displays every class listed in their contract which can be booked online by the patient.
	Contract	Displays every class listed in their contract which can be booked online by the patient.
Location	Booklet	Displays the allowed locations as listed against the patient's application of the booklet.
	Not booklet	If the booking type is not a booklet, displays: · **Any location** - This is the first item and is the default selection when the control is refreshed or cleared. · All locations in the selected appointment type's allowed locations.

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Class booking wizard – step 2

Step 2 of the class booking wizard provides users with the available class options based on their search criteria. Users can book one or multiple classes in one booking transaction.



The search results in the class booking wizard are not optimized, therefore a **Show More** button is not displayed.

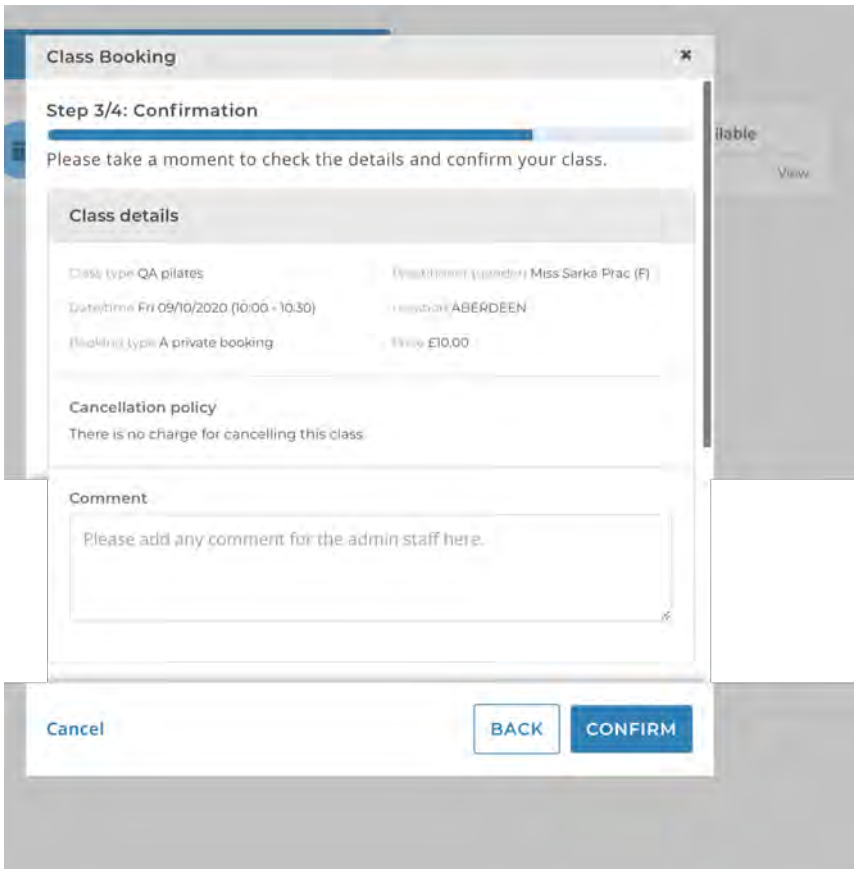
Price is only displayed when the payment type is private.

	Design attribute	Description
1	Multiselect buttons	Users can select multiple classes to book in one transaction.

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Class booking wizard – step 3

Step 3 of the class booking wizard allows users to review booking details and cancellation policy. When multiple classes are selected, each class's details are populated in this screen:



The SMS and email reminder options are:

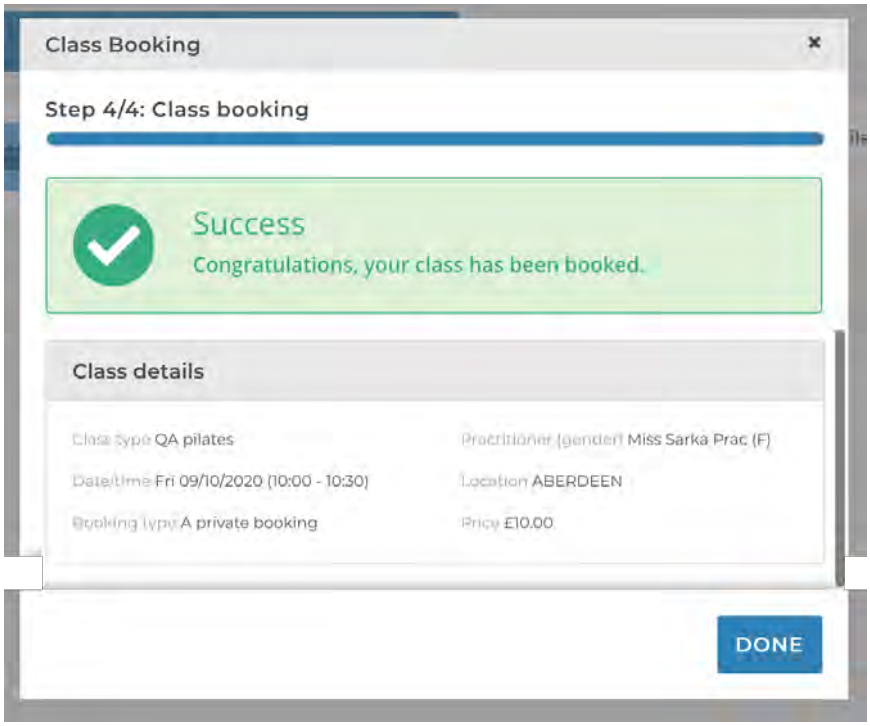
Field	Description
Send SMS reminder	The option to send a SMS reminder will only be displayed if: • the patient has consented to 'SMS reminders', and • the patient has a mobile number recorded.
Send email reminder	N/A – email reminders are not currently available for class bookings.

Discounts are not available for classes.

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Class booking wizard – step 4

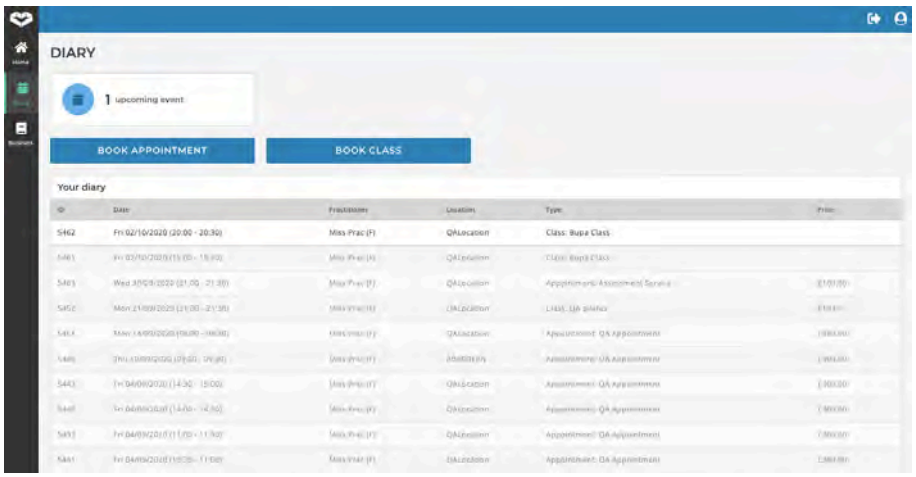
Step 4 of the class booking wizard is a confirmation screen.



If an error occurs while booking classes in step 4, the patient is given the option to start again and all search criteria is saved.

Diary

The **Diary** enables patients to manage their upcoming appointments and classes, as well as view past bookings. Patient Portal users can access the **Diary** from the **Patient Portal** menu.



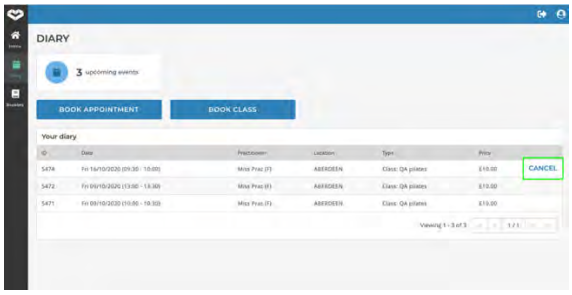
Appointments where the patient was recorded as **Did not arrive** are not displayed.

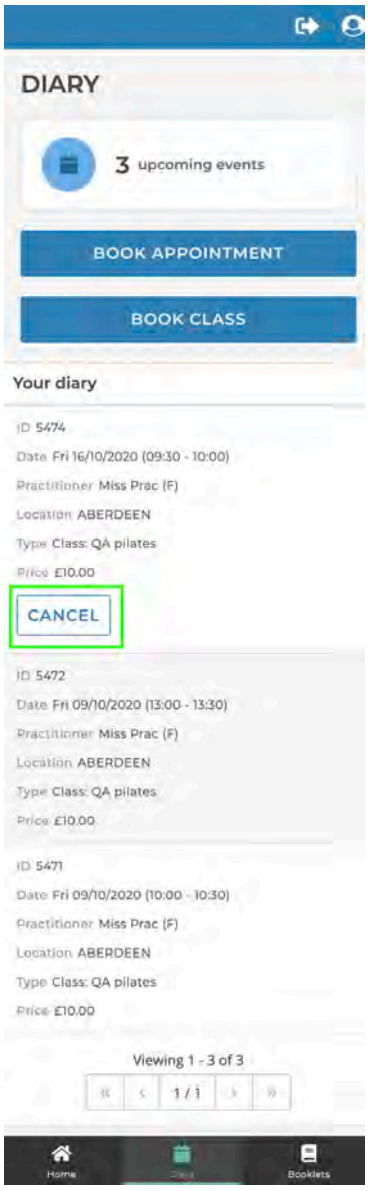
Future appointments can only be cancelled if there is more time than the minimum cancellation period, which is defined in the *Cancellation policy (page 25)*.

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Cancellations

Patients can cancel appointments and classes from the **Diary** screen in the Patient Portal. **Cancel** is displayed when the appointment or class can be cancelled based on its cancellation policy.





Patients must select a cancellation reason from the drop-down list.

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Cancellation message

The patient is sent a cancellation message when they cancel an appointment or class, depending on the following rules:

Cancellation rule	Message
No time-based cancellation charge.	“There is no charge for cancelling this appointment / class”
There is a time-based cancellation charge, but it is not incurred by the patient.	“This appointment / class has a cancellation fee applied”
There is a time-based cancellation charge and it is incurred by the patient.	“This appointment / class has a cancellation fee of £xxx” The "£xxx" value is defined in the cancellation policy, see *Cancellation policy (page 25)*.

The patient can also receive a cancellation email confirmation which is defined in the **Appointment Cancel** email template. To view or change this email template, select **Email Templates** in the **Communication** menu and select the **Appointment Cancel** email template.

Appointment reminders

SMS reminders

Patients receive SMS appointment reminders if they have:

- A mobile number recorded and
- consented to SMS messages.

Email reminders

Patients receive email appointment reminders if they have consented to receive email messages.

Pricing

The price is only displayed if the patient is the payor and the patient has not used a booklet.

Multipart appointments

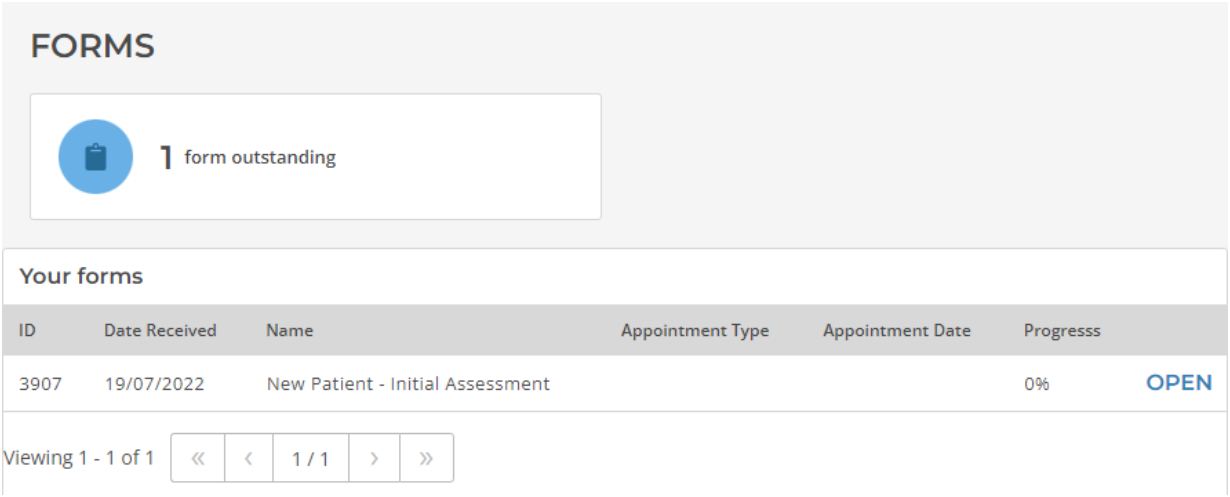
Multipart appointments often contain more than one practitioner. When displayed in the diary, multiple part appointments are rolled up and only the primary practitioner is listed.

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Forms

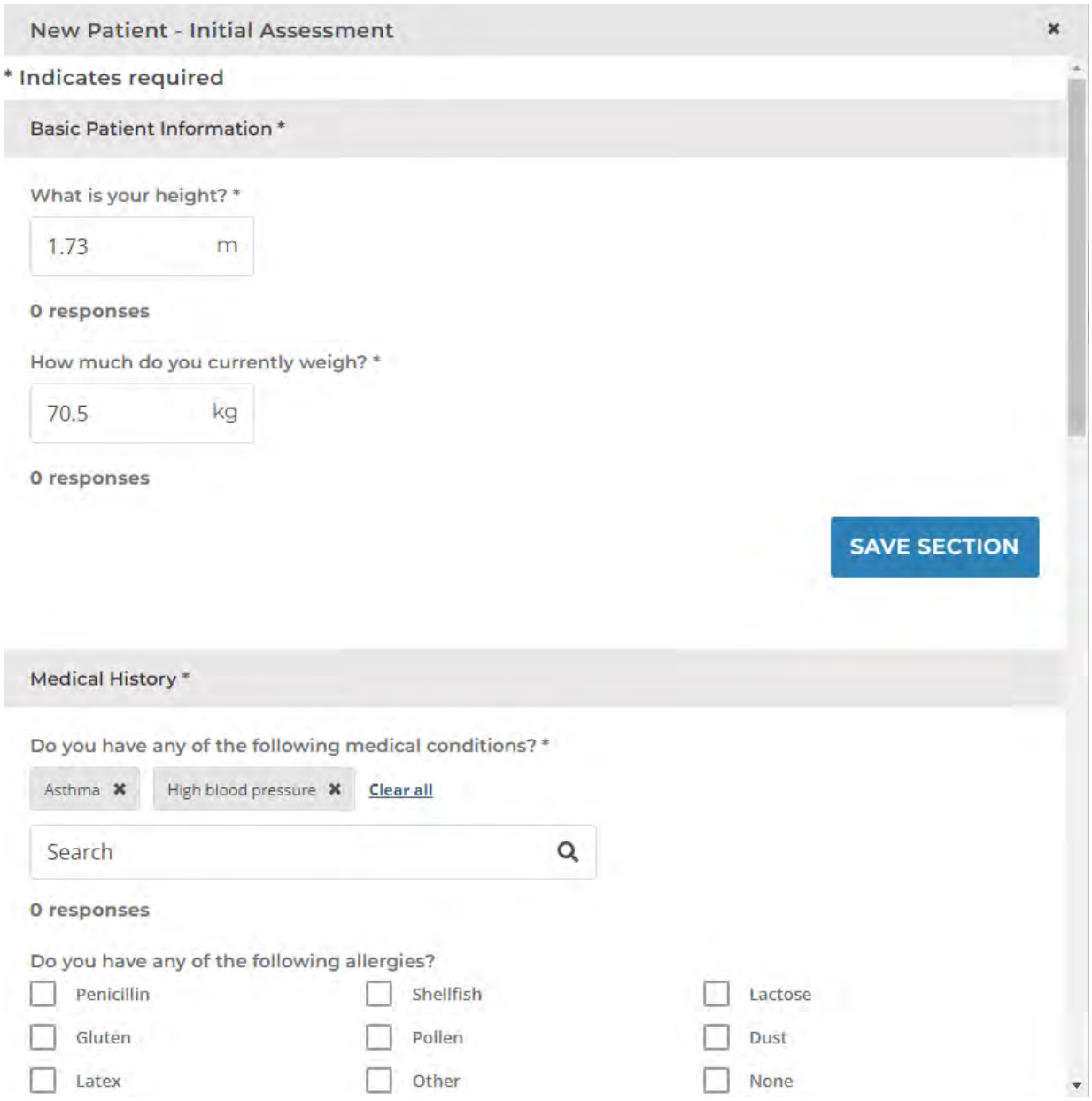
The **Forms** page enables patients to view a list of forms that have been sent to them. The patient can open the forms securely so that they can fill them in.

When a patient clicks **Forms** in the **Patient Portal** menu, a list of forms displays.



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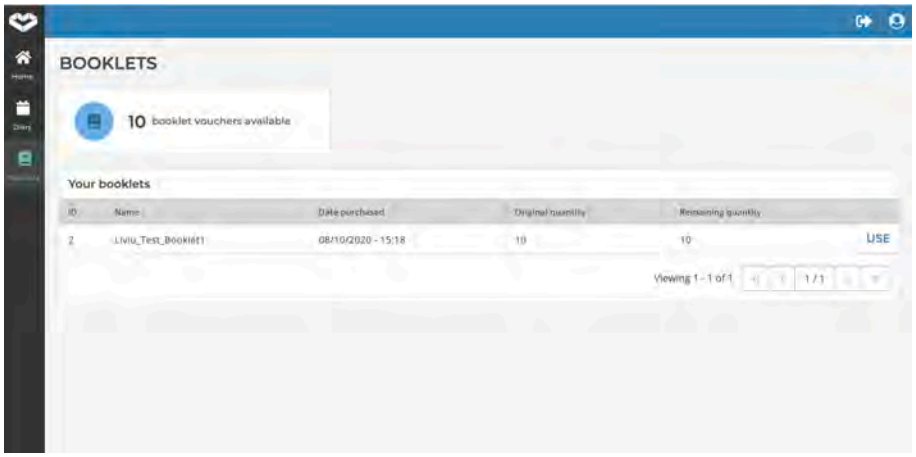
The patient can click **Open** to view and fill in the form.



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Booklets

Booklets enable multiple classes or appointments to be sold as a package, often for a discounted price. Users can access **Booklets** from the menu. The **Booklets** page in the Patient Portal enables patients to manage their booklets in one area, as well as see past booklets with vouchers that were available to be booked online.

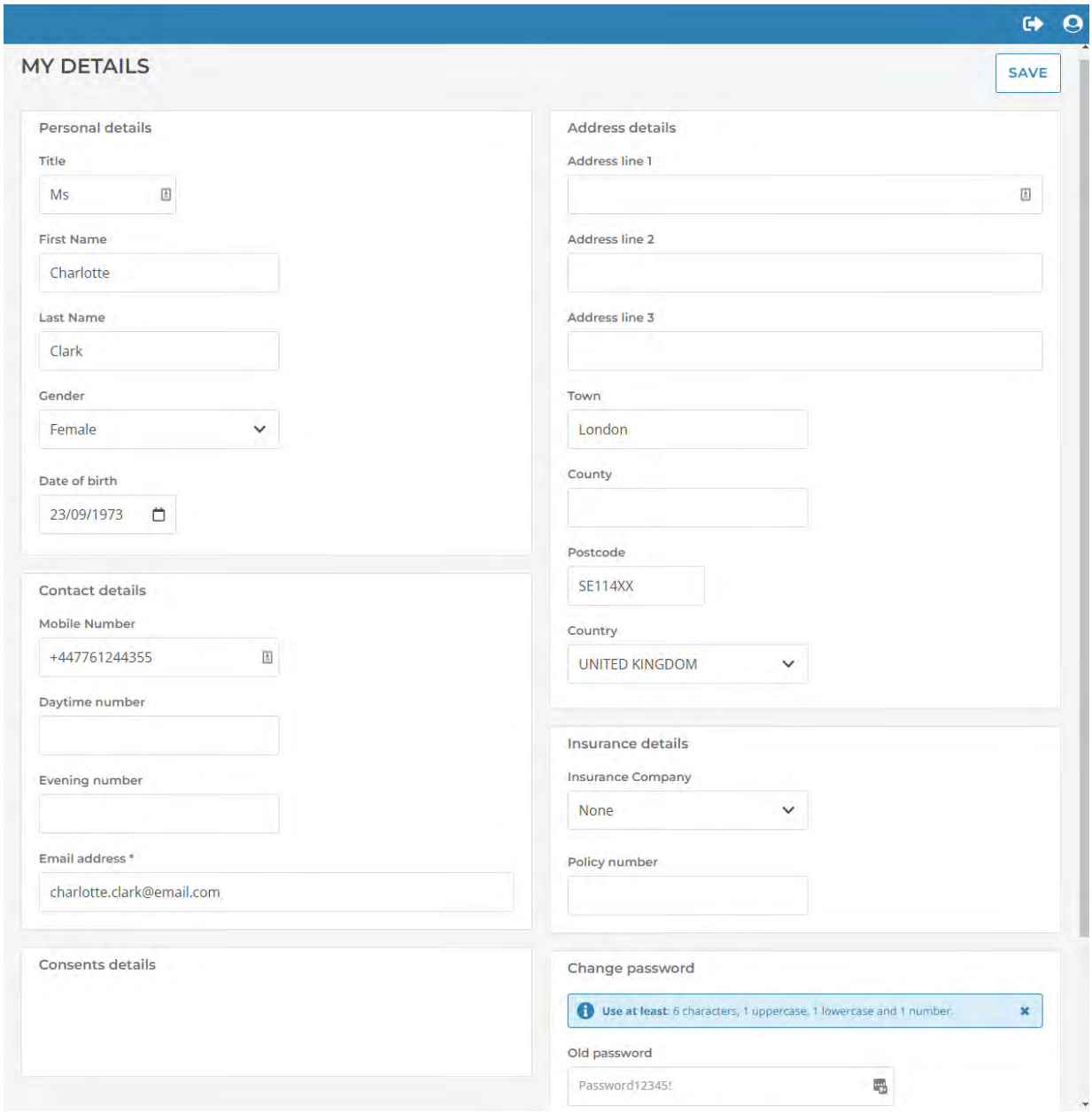


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My details

The **My Details** page enables patients to view their personal details, including name and address, contact details, and communication preferences. Depending on the Patient Portal configuration, patients can also view their insurance details, update their personal details and change their passwords.

Patient Portal users can access the **My Details** page from the person icon in the top right corner of the screen.



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Patient logout

When a patient has finished using the Patient Portal, they can log out by clicking the icon in the top right corner of the screen.

Browsers supported by the Patient Portal

The Patient Portal can be accessed by users on many different web browsers and devices. We support a large number of browser versions; however, some users may attempt to access the Patient Portal on a non-supported browser version.

Supported browsers

The Patient Portal supports the current version, and the last three versions of Chrome, Safari, Edge and Firefox, as well as supporting IE11.

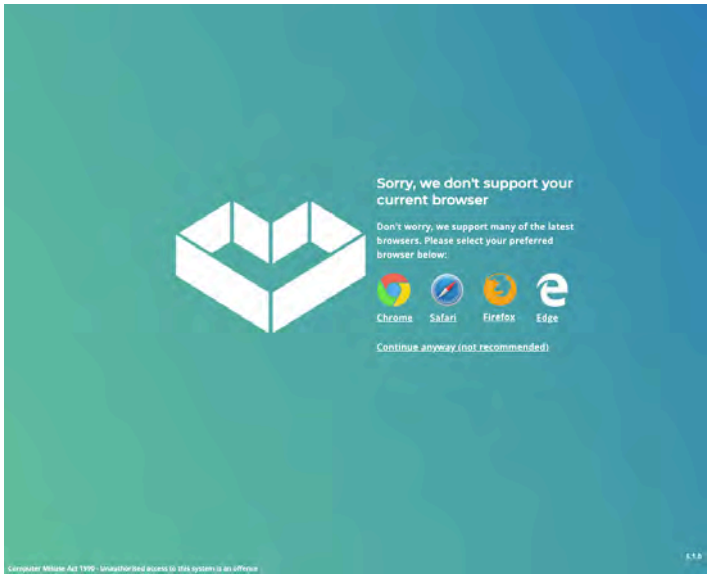
The current supported browser versions are:

- Chrome 81+
- Safari 11+
- Edge 81+
- Firefox 76+
- IE11

This list of supported browser versions will be updated in the future to ensure each new Patient Portal release supports the correct browser versions as per our policy.

Unsupported browsers

Users attempting to access the Patient Portal on an unsupported browser are taken to the unsupported browser page:



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The following actions are taken, if a user tries to open the Patient Portal using an unsupported browser:

Unsupported browser page links	Description
Chrome	Opens Chrome's download page: *https://www.google.com/chrome/*
Safari	Opens Safari's download page: *https://www.apple.com/safari/*
Firefox	Opens Firefox's download page: *https://www.mozilla.org/en-GB/firefox/*
Edge	Opens Edge's download page: *https://www.microsoft.com/en-us/edge*
Continue anyway (not recommended)	Opens the Patient Portal log in page in the user's unsupported browser. There may be issues and inconsistencies with using the Patient Portal on an unsupported browser.

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Checklists

Patient Portal configuration decision checklists

The following checklists capture key decisions you must make so that Lumeon can configure the Patient Portal for your organization.

Custom styling checklist

Decide on the following - see *Custom styling decisions (page 5)*:

- ☐ Login screen authentication logo
- ☐ Login screen background colour
- ☐ Home screen logo
- ☐ Primary colour (normal)
- ☐ Primary colour (dark)
- ☐ Primary colour (light)
- ☐ Secondary colour (normal)
- ☐ Secondary colour (dark)
- ☐ Secondary colour (light)

Core configuration decision checklist

Check that you have decided on:

- ☐ Class booking functionality - see *Patient Portal functionality (page 8)*.
- ☐ Forms functionality - see *Patient Portal functionality (page 8)*.
- ☐ Booklet functionality - see *Patient Portal functionality (page 8)*.
- ☐ Patient access to personal details - see *Patient details decision (page 8)*.

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Optional authentication decisions checklist

Check that you have decided the following:

- ☐ Whether to enable two factor authentication for the Patient Portal - see *Two factor authentication decisions (page 9)*.
- ☐ If you decide to enable two factor authentication, your configuration options - see *Two factor authentication configuration options*:
  - ☐ Token length - length of the one-time access code.
  - ☐ Token - what the one-time access code consists of: numbers, lower case letters, or upper case letters.
  - ☐ Re-authentication rules - when re-authentication is invoked: on IP change or referrer change.
  - ☐ Re-authentication timeout - how often re-authentication should be performed: always, daily, seven days, fourteen days, or one month.
  - ☐ Authentication type - how the one-time access code is sent to the user: SMS or email.
- ☐ Whether to enable strong passwords for the Patient Portal and Lumeon Conductor - see *Strict password decisions (page 10)*.
- ☐ Whether to enable security questions for the Patient Portal and Lumeon Conductor - see *Security questions (page 10)*,

System administrator setup checklists

Email and SMS template checklist

Ensure that you have done the following:

- ☐ View, update (if necessary) and activate the welcome email template - see *Welcome email (page 13)*.
- ☐ View, update (if necessary) and activate the account locked email template - see *Account locked email (page 14)*.
- ☐ View, update (if necessary) and activate the appointment reminder email template - see *Appointment reminder email (page 15)*.
- ☐ Create and activate the appointment reminder SMS template - see *Appointment reminder SMS (page 16)*.

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Patient Portal display text checklist

Set up the following - see *Set up Patient Portal display text (page 17)*:

- ☐ Patient Portal introductory text
- ☐ Computer Misuse Act message
- ☐ Cancellation policy text

Other system administrator setup task checklist

Ensure that you have done the following, if required:

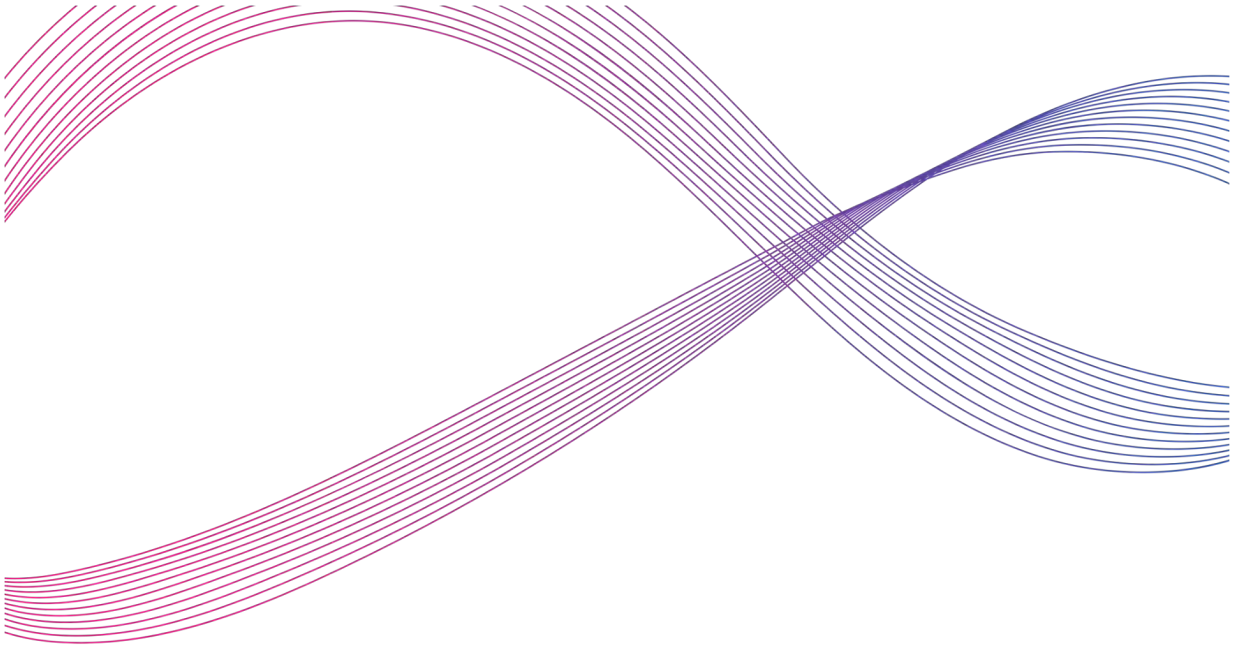
- ☐ Set up security questions - see *Set up security questions (page 20)*.
- ☐ Set up appointment types - see *Set up appointment types (page 21)*.
- ☐ Set up classes - see *Set up classes (page 23)*.
- ☐ Set up booklets - see *Set up booklets (page 23)*.
- ☐ Set up patient forms - see *Set up patient forms (page 24)*.
- ☐ Ensure that cancellation policies have been set up for the appointment types and classes - see *Cancellation policy (page 25)*.
- ☐ Set up cancellation reasons - see *Set up cancellation reasons (page 27)*.

Patient setup checklist

Ensure that you have done the following:

- ☐ Create and run a report of patient emails and mobile numbers - see *Patient record reporting (page 28)*.
- ☐ Contact Lumeon for a query of Patient Portal access indicators, if required - see *Patient record reporting (page 28)*.
- ☐ Ensure that all patients who will have access to the Patient Portal have an email address on their patient record - see *Patient email address for login (page 30)*.
- ☐ Ensure that all patients who will have access to the Patient Portal have a mobile number on their patient record - see *Patient mobile number (page 31)*.
- ☐ Ensure that all patients who will have access to the Patient Portal have the access indicator selected - see *Enable patients to access the Patient Portal (page 32)*.

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Prescriptions in Lumeon Conductor 24.2

Issued by: Lumeon Learning
Date of Issue: August 2024

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Introduction

Lumeon Conductor enables practitioners to generate private prescriptions for patients.

Conductor can be integrated with the ***SafeScript*** drug database. SafeScript is a world standard drug database which facilitates the matching of coded patient data with drug specific coding derived from the medical coding system. It enables practitioners to search for medications with corresponding dosage and supply information, of a universal standard.

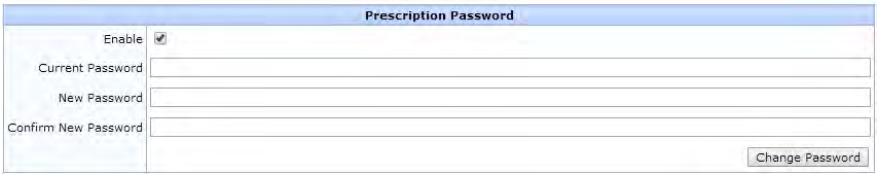
Practitioners intending to use the prescriptions feature in Lumeon Conductor must have a GMC (General Medical Council) number recorded in their practitioner profile. Without this, the feature is not displayed in the **Prescriptions** tab in the EMR (Electronic Medical Record) and clinicians are unable to prescribe medication through Conductor.

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Prescription passwords

A core configuration setting enables prescription passwords for practitioners.

If this setting is activated, you can manage your password settings by clicking the **My Details** option in the top menu bar.



A pop-up prompt then appears when you create a prescription requesting that you enter your password. This setting has no effect on your ability to record medication.



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Prescriptions

If configured, you can create and print prescriptions by clicking the **Prescription** tab in the patient EMR. You must have a GMC number entered in your personal details in order to access the prescription page.

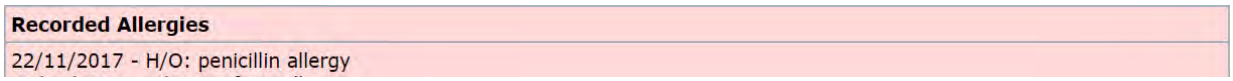
Only practitioners can generate prescriptions and, therefore, the feature only displays in the practitioner user interface.



Recorded allergies

You enter allergies in the EMR **Journal** tab.

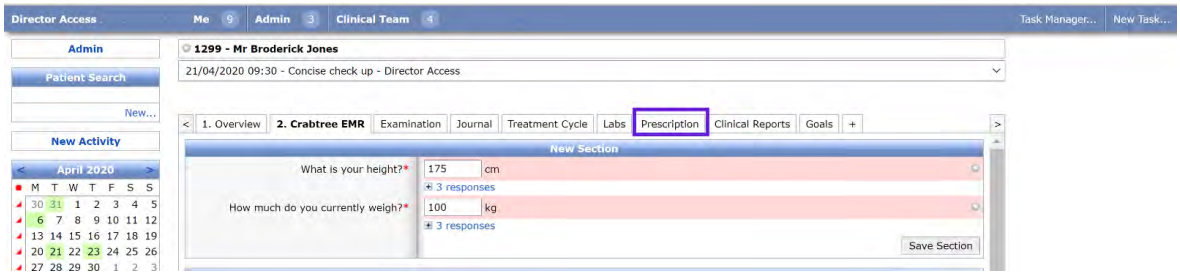
Conductor displays a red banner at the top of the **Prescription** tab to clearly indicate if a patient has any allergies recorded on their medical record. Conductor uses ***SNOMED CT*** or ***Read Codes*** to enable a broad application of allergic classifications to be recorded on a patient record.



Create a prescription

To create a new prescription:

1. Search for a patient to display their Electronic Medical Record (EMR), and then select the **Prescriptions** tab.

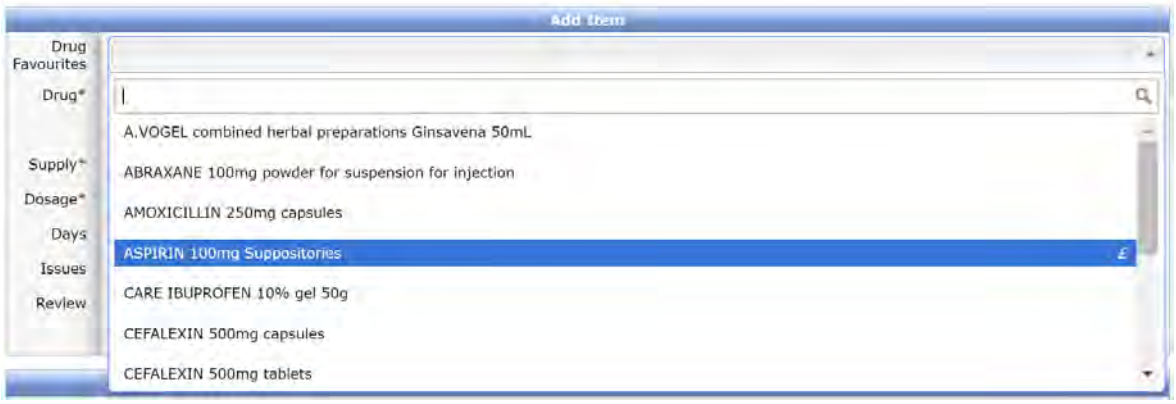


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2. Use the **Drug** field to search for the medication that you want to prescribe. Start typing the name of the medication and a list of drugs that match the entered text is displayed. Select the correct drug from the drop-down list.



3. Alternatively, select a drug favourite from the drop-down list in the **Drug Favourites** field.



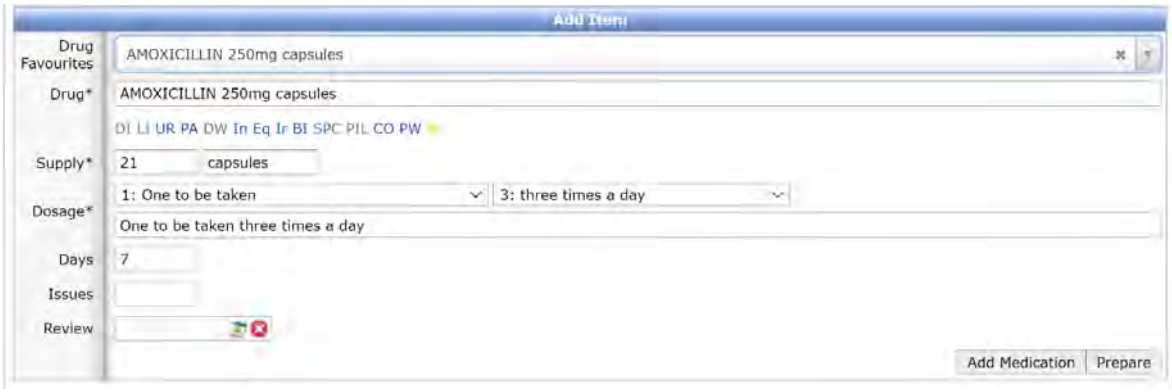
Search results that display a pound sign (£) next to them indicate the following:

- The drug is linked to a drug product.
- The drug has pricing applied to the item.
- The drug is available on the private or self-pay contract.
- You can decrement the stock of the item.

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4. Select an item and the supply and dosage information auto-populates from the ***SafeScript*** database. You can amend the supply and dosage information, which in turn updates the dosage text. You can select a dosage option when there are two different descriptions in the ***SafeScript*** database.

   Next to **Dosage**, there are two short fields above and one longer field below. Select the dosage from the drop-down list in the first short field. Select further dosage instructions in the second short field, as appropriate. A longer version of the text displays in the field below, based on the options selected in the two short fields. The text in the longer field appears on the prescription. You can change this, if required.

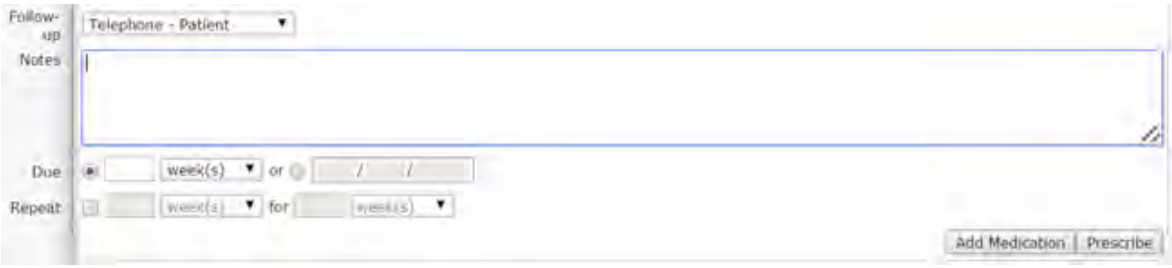


5. Enter the number of issues and select a review date, if necessary.

6. If the product is a drug product stock item, select **Decrement Stock** to indicate that the item is coming out of stock.



7. If the prescription requires a follow-up, select the type of follow-up from the drop-down list and enter the due date and any notes. You can also set up repeat follow-ups.



8. Click **Add Medication**.

9. Repeat to prescribe other items, as required.

10. Click **Prescribe**.

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11. The prescribed items appear in the **Prepare Prescription** section where you can confirm the details and check to see if there are any interactions with the patient's current medication. You may see a pop-up window so you can confirm the prescription if contraindications or interactions exist. This is configurable - contact Lumeon Support if you want this feature enabled.

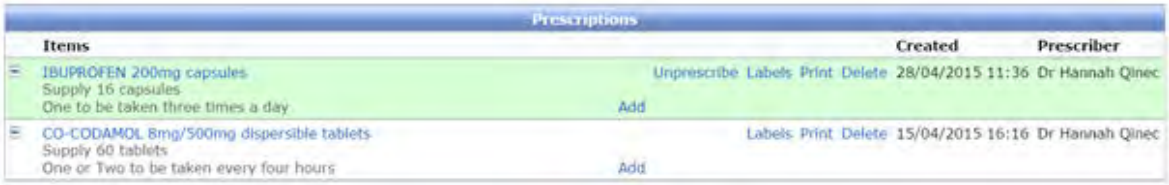


12. If you selected **Decrement Stock**, select the quantity of items and batch.

13. Click **Add Digital Signature** to enter a digital signature which is printed on the prescription.



14. When you have checked the prescription items, click **Prescribe** to generate the prescription. The prescription displays in the list of prescriptions. The prescription items are charged to the payor of the appointment.



You have the following options in the list of prescriptions:

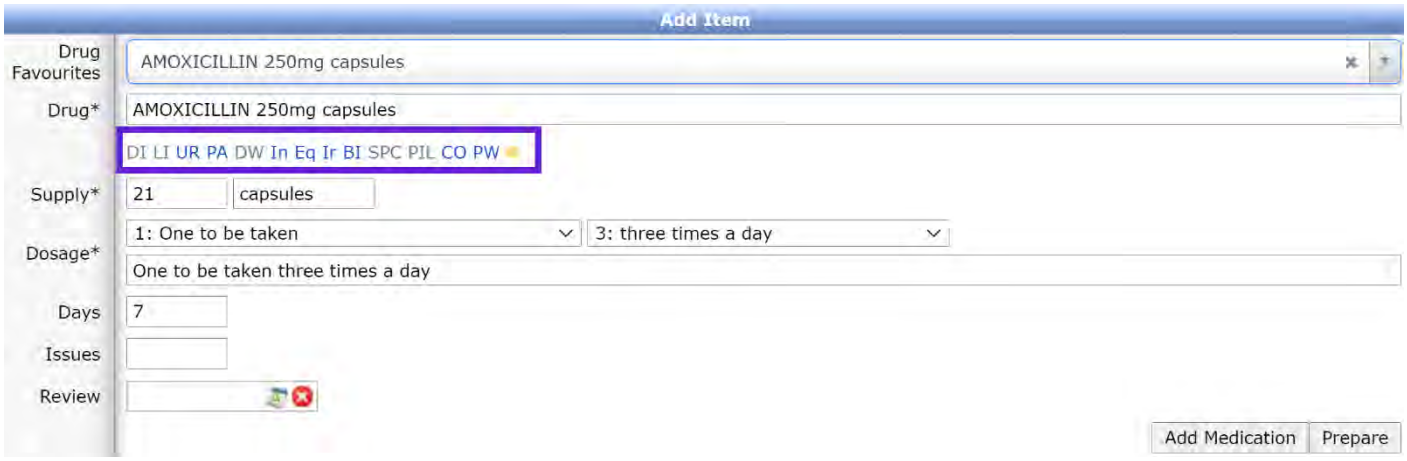
- **Add** - Populates the fields in the **Add Item** section, allowing you to add medication again. Current medication is highlighted in green.
- **Unprescribe** - Stops the prescription. The **Unprescribe** option is only available to the user who created the prescription and disappears after 2 hours.
- **Labels** - Prints labels for the prescriptions.
- **Print** - Prints the prescription. You can print prescriptions on normal A4 headed paper. Each prescription print out has a unique ID. This is different to the prescription number and changes each time a printable copy of a prescription is generated.
- **Delete** - Removes the item from the patient's medication list.

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Additional clinical information

The ***SafeScript*** integration provides additional clinical information.

Once you have searched for and selected medication, Conductor populates additional data about the pharmaceutical product that you should consider before prescribing for the patient.



You can view additional information by clicking on the following letters:

- **BI** – BNF Interactions
- **CO** - Contraindications
- **DI** - Dosage Information
- **DW** – Doctor Warnings
- **Eq** – Equivalents
- **In** – Ingredients
- **Ir** –Interactions
- **LI** – Licensed Indications
- **PA** – Patient Advisories
- **PIL** – Patient Information Leaflet
- **PW** – Pregnancy Warnings
- **SPC** – Summary of Product Characteristics
- **UR** – Usual Routes

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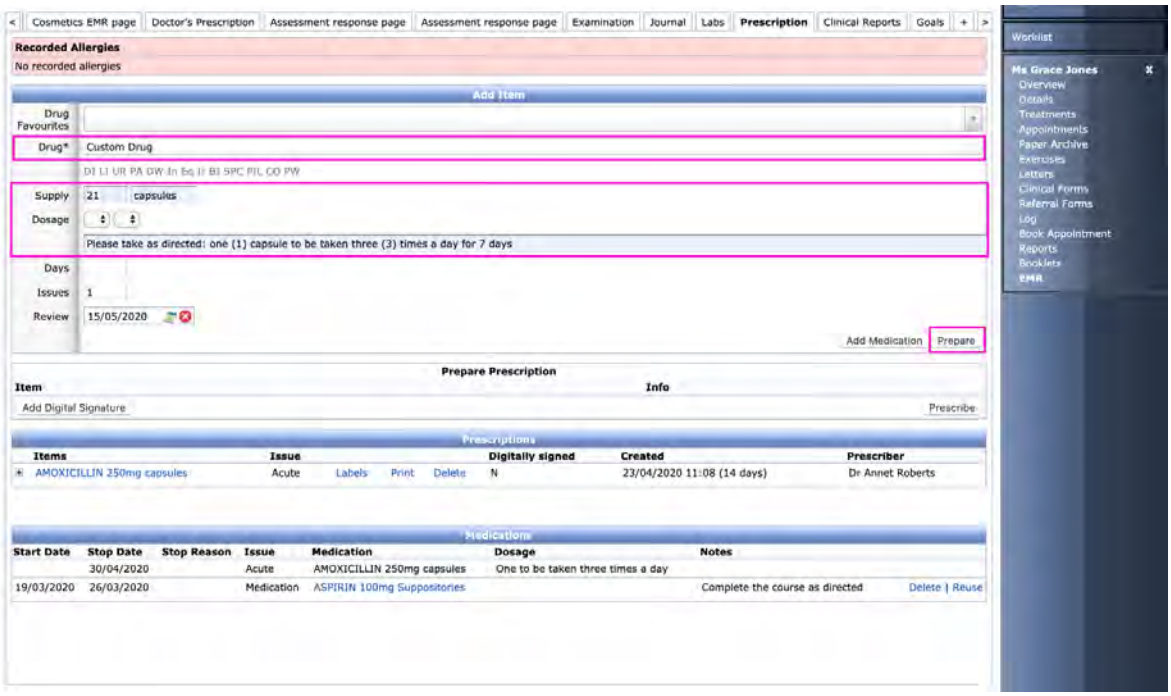
Custom drug prescriptions

Practitioners can also prescribe medication that is not listed within the ***Safescript*** database.

For any custom drug prescription, the additional clinical Information does not display because the product is not included within the ***SafeScript*** database. It is therefore your responsibility to provide the patient with any extra information themselves.

To enter a custom drug prescription:

1. Enter the name of the medication in the **Drugs** field.



2. Enter **Supply** information.
3. Enter **Dosage** information.
4. Click **Prepare**.

For all custom drug prescriptions, the message **Unlisted product - availability unknown** displays in yellow in the **Drug Availability** field.

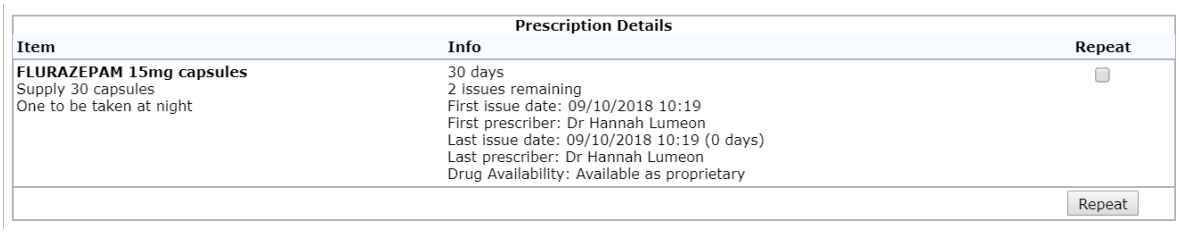
> ⚠ When you prescribe custom drugs, no information regarding contraindications or pregnancy warnings are displayed. You should provide this information to the patient.

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Repeat prescriptions

To create a repeat prescription:

1. First select the name of the prescription. The medication details appear in the **Prescription Details** box.



Prescription Details

Item	Info	Repeat
FLURAZEPAM 15mg capsules Supply 30 capsules One to be taken at night	30 days 2 issues remaining First issue date: 09/10/2018 10:19 First prescriber: Dr Hannah Lumeon Last issue date: 09/10/2018 10:19 (0 days) Last prescriber: Dr Hannah Lumeon Drug Availability: Available as proprietary	☐
		Repeat

2. Select the **Repeat** check box for the item you want as a repeat prescription, and then click the **Repeat** button to generate the repeat prescription.

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Add medication

To record medication against a patient's EMR without generating a prescription:

1. Follow the steps outlined in *Create a prescription (page 5)*, but select **Add Medication** and not **Prescribe**.



2. Enter the start date, stop date, reason for stopping the medication, and any notes.
3. Click **Add**. This medication appears in the section below where it can be deleted or reused. Prescribed medication is highlighted in green.

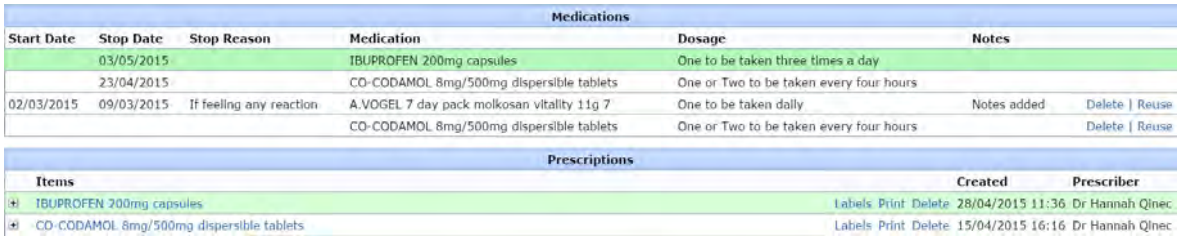
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Administrators and prescriptions

Administrative staff can access patient prescription information enabling them to print prescriptions and labels. Visibility of this information is controlled by a core configuration setting. Contact Lumeon Support if you want this functionality enabled.

To print prescriptions or labels:

1. From the **Administrator** user interface, search for and display a patient record, and then select **Prescriptions** in the **Patient** menu.



Medications

Start Date	Stop Date	Stop Reason	Medication	Dosage	Notes	
	03/05/2015		IBUPROFEN 200mg capsules	One to be taken three times a day		
	23/04/2015		CO-CODAMOL 8mg/500mg dispersible tablets	One or Two to be taken every four hours		
02/03/2015	09/03/2015	If feeling any reaction	A.VOGEL 7 day pack molkosan vitality 11g 7	One to be taken daily	Notes added	Delete | Reuse
			CO-CODAMOL 8mg/500mg dispersible tablets	One or Two to be taken every four hours		Delete | Reuse

Prescriptions

	Items		Created	Prescriber
⊞	IBUPROFEN 200mg capsules	Labels Print Delete	28/04/2015 11:36	Dr Hannah Qinec
⊞	CO-CODAMOL 8mg/500mg dispersible tablets	Labels Print Delete	15/04/2015 16:16	Dr Hannah Qinec

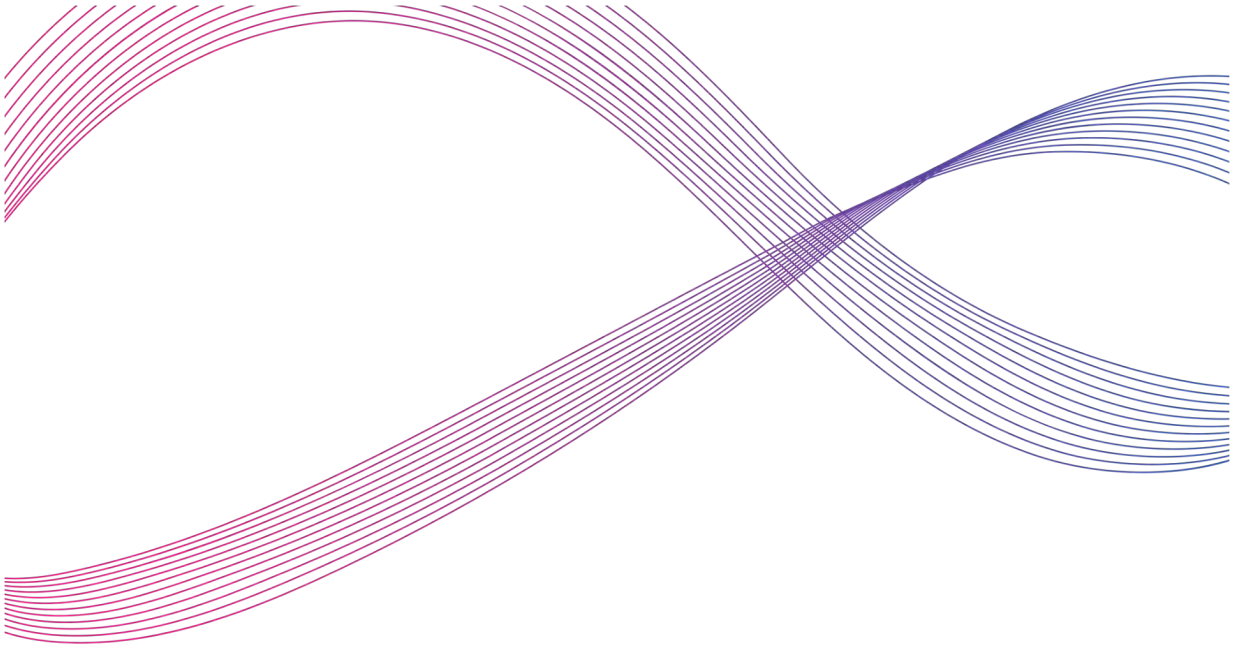
2. Click **Labels** to print the medication labels or click **Print** to print the prescription.

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Glossary

Read Codes	A thesaurus of clinical terms. Superseded by ***SNOMED CT***. See *https://digital.nhs.uk/services/terminology-and-classifications/read-codes* for more information.
SafeScript	An international set of databases providing information about drugs, such as ingredients, side effects, contraindications, and use in pregnancy. See *https://www.safescript.com/*.
SNOMED CT	An electronic database of international clinical terminology. See *https://www.snomed.org/snomed-ct/five-step-briefing* and *https://digital.nhs.uk/services/terminology-and-classifications/snomed-ct* for more information.

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Security in Lumeon Conductor 24.2

Issued by: Lumeon Learning
Date of issue: August 2024

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Introduction

Lumeon Conductor provides a comprehensive care orchestration platform with a number of security features.

Purpose

The purpose of this document is to describe how to:

1. Sign into Conductor using single sign-on - see *Single sign-on (page 4)*.
2. Sign into Conductor using two factor authentication - see *Use two factor authentication (page 5)*.
3. Use secure emails using either:
   - Secure email domains - see *Use secure email domains (page 7)*.
   - An email template that is marked as secure - see *Use secure emails (page 7)*.

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Single sign-on

Single sign-on (SSO) enables you to access Conductor using the same user name and password that you use to access their other software systems.

Before signing into Conductor, you must have been assigned a single sign-on user name and password.

Log into Conductor using SSO

To log into Conductor using single sign-on:

1. Navigate to the Conductor login page.
2. Click the **SSO Login** button shown in the screenshot below. If you try to log in by selecting **Log in directly**, you will receive an error saying **unknown email address or incorrect password**.
3. This automatically logs you into Conductor. Your user was authenticated as soon as you log into your computer. If, for some reason, your user name is not already authenticated, you are prompted to enter your credentials into the window provided before you can access Conductor.

Log into Conductor without using SSO

Some users may need multiple user types to access different roles in Conductor. For example, you may want to log in as an administrator and as a nurse. If this applies to you, you need two or more separate users in Conductor that each have a unique email ID. These additional users cannot log in using SSO.

To do this, we recommend adding something to the beginning of your normal email address, separated by the **@** symbol. For example, if **jane@lumeonhealthcare.org** has a Conductor account as an administrator and wants a nurse user as well, the additional user could have an email ID of something like **nurse@jane@lumeonhealthcare.org**.

To log into Conductor using an alternative email address:

1. Navigate to the Conductor login page.
2. Click **Log in directly**.
3. Enter your alternative email address, for example, **nurse@jane@lumeonhealthcare.org**, and your password.
4. Click **Log in**.

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Use two factor authentication

Two factor authentication (2FA) enables Conductor to guarantee that the user attempting to log in is who they say they are, by sending a verification token to the user and requiring the user to enter that token, before they can access the system.

Detail of functionality

When logging into Conductor, it sends either an SMS message to the mobile phone number of the user attempting to log in, or an email to their registered email address. Conductor prompts the user to enter the token contained in the SMS or email. If the user has logged in from this device within a set period, for example, within the last month, then Conductor does not send an SMS or email because we can be relatively certain that the user is in the familiar place so we do not need to reassert their credentials.

Conductor can also limit access of the user from specific IP addresses to ensure that, whether or not they are sent a token, the location of the user can be guaranteed.

In the context of two factor authentication, a user may be:

- An internal user such as an administrator, a clinician, or a reviewer.
- A patient accessing the patient portal.
- An external user, such as a company user or a referrer.

Sign in using two factor authentication

You must use two factor authentication (2FA) to sign into Conductor once it has been configured by Lumeon and set up by Lumeon or your system administrator.

To sign in using two factor authentication (2FA):

1. Enter your user name and password.
2. Conductor sends either an SMS message to your mobile phone number or to your email address depending on the 2FA configuration. Enter the authentication token contained in the SMS or email:



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3. Click **Authenticate me**. You have now been authenticated and have access to Conductor.

When Conductor sends authentication codes depends on the following 2FA configuration settings.

- **Re-Authentication Rules** - Checks whether the user is in the same location. If it is set, Conductor asks a user to authenticate every time they change location, for example, changing from working in the office to working from home.
- **Re-Authentication Timeout** - Ensures that a user must authenticate again after a set period, regardless of location. For example, if the setting is one month, then Conductor asks a user to re-authenticate one month after their last authentication.

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Send secure emails

Conductor has two ways of sending secure emails:

- Send an email to a secure domain - see *Use secure email domains (page 7)*.
- Send an email using a template that is marked as secure - see *Use secure emails (page 7)*.

Use secure email domains

When an action in a pathway is triggered to send an email and the action specifies sending emails via secure email, Conductor checks the table of secure email domains when executing the action. If the recipient's domain is listed as a secure email domain, Conductor sends this email via the secure email service defined in a core configuration parameter. If the recipient's domain is not listed as a secure email domain, Conductor does not send the email and creates a **not a secure domain** message in the log.

If an action is not defined as sending secure emails, Conductor does not send emails securely.

Use secure emails

Send a secure email

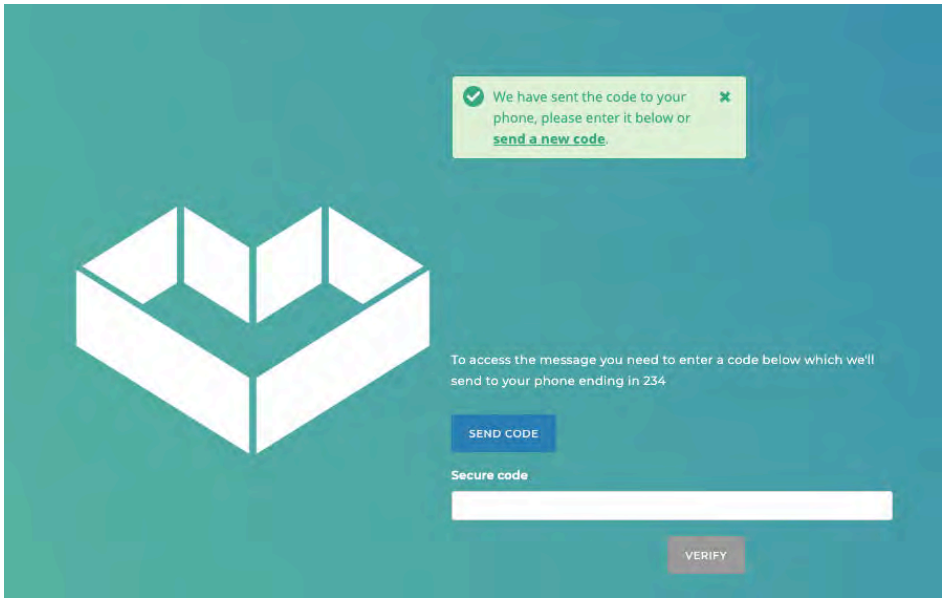
When Conductor sends an email that uses a template with the **Secure Email** checkbox selected, Conductor initially sends an email containing a link to the secure email. In this way, you can configure any email template to use the secure email process, for example, when sending sensitive information or patient forms with previous answers attached.

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View a secure email

If you receive an email inviting you to view a secure email, do the following:

1. Click the link in the email. A page similar to the following displays:



2. Click **Send code**. Conductor generates an authentication code and sends it by SMS or IVR, depending on what was specified in the email template.
3. Enter the authentication code sent to you in the **Secure code** field and click **Verify**.
4. You can then view the secure email.

View secure email audit log

System administrators can view the audit log for secure emails. This menu option is controlled by a security point. If you cannot see it and want to access to it, contact your system administrator or Lumeon Support.

To view the audit log for secure emails:

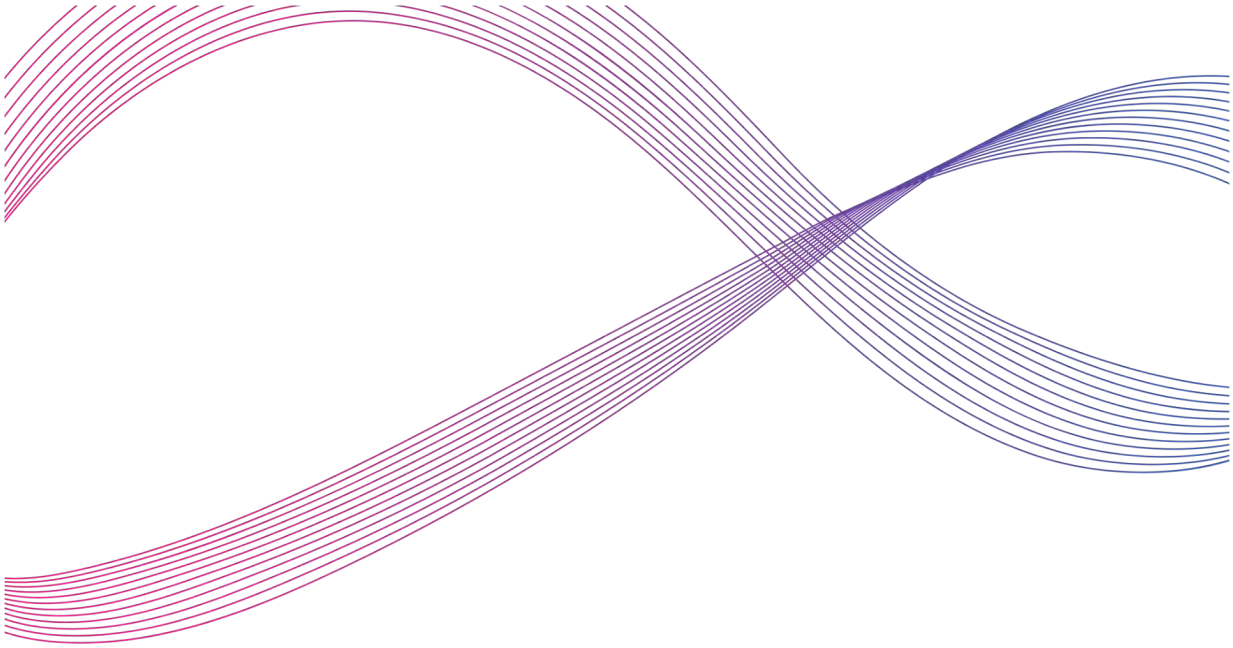
1. Select **Secure Email Audit Log** on the **Communication** menu. The **Secure Email Audit Log** page displays.

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2. Enter the search criteria that you want to use to search for audit logs:
   - **First Name** - Enter the first name of the email recipient.
   - **Last Name** - Enter the last name of the email recipient.
   - **Email Address** - Enter the email address of the email recipient.
   - **Email Status** - Select the email status from the drop-down list. Options are:
     - **Email Sent** - A secure email has been sent to the recipient.
     - **Auth Page Opened** - The recipient has opened the authentication page.
     - **Too Many Attempts** - The recipient entered the authentication code incorrectly too many times.
     - **Revoked** - An administrator has revoked access to the secure email.
     - **Secure Email Read** - The recipient has read the secure email.
   - **Date Sent** - Enter a date range when the emails were sent.
3. Click **Search**. A page displays containing all secure emails that meet the search criteria.

If a recipient has not read a secure email, they have not entered the authentication code incorrectly too many times, and the secure email has not expired or been revoked, you can click **Revoke** to revoke access to the secure email. This means that the recipient will no longer be able to view it. The **Revoke** button is controlled by a security point. If you cannot see it and want to access to it, contact your system administrator or Lumeon Support.

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Security Setup in Lumeon Conductor 24.2 for System Administrators

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Introduction

Lumeon Conductor provides a comprehensive care orchestration platform with a number of security features.

Purpose

The purpose of this document is to describe how to:

1. Set up single sign-on (SSO) users and additional non-SSO users - see *Single sign-on (SSO) in Conductor (page 4)*.
2. Set up two factor authentication - see *Two factor authentication (page 8)*.
3. Set up secure emails using either:
   - Secure email domains - see *Set up secure email domains (page 11)*.
   - An email template that is marked as secure - see *Set up secure emails using templates (page 12)*.

See ***Security in Lumeon Conductor*** for information on the security functionality available and how to use it.

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Single sign-on (SSO) in Conductor

You can set up your users to access Conductor using single sign-on (SSO). This enables them to access Conductor in the same way that they access their other software systems.

If your organization wants users to use SSO to sign into Conductor, contact Lumeon Support so that we can configure it for you.

Before setting up users to use SSO to access Conductor, a single sign-on user name and password must have been assigned to them.

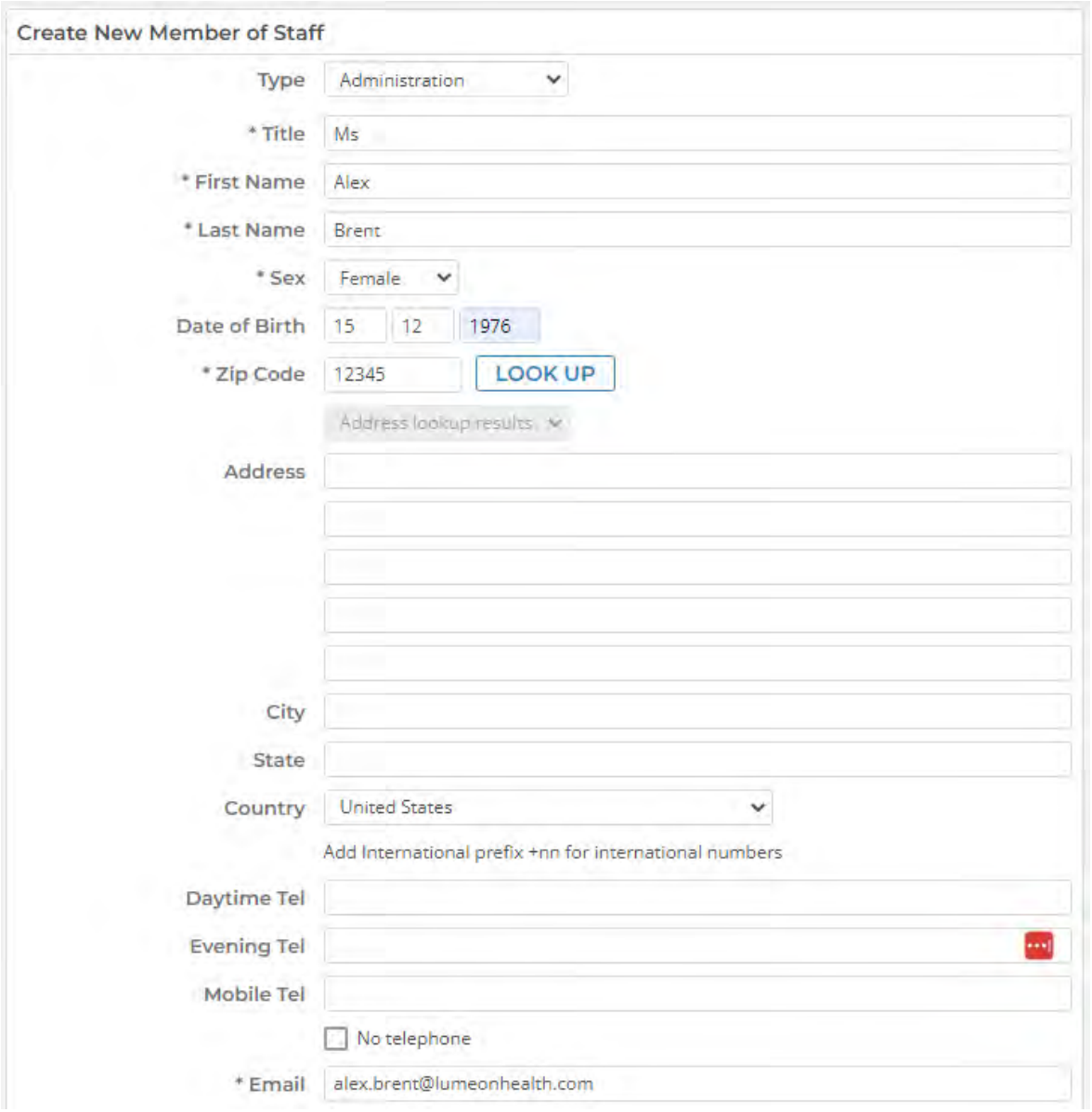
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Create a new SSO user in Conductor

Before creating a new user to use single sign-on, ensure that the user has an account using their UPN, not their email address.

To create a new user that uses SSO to sign in:

3. Select the correct user type in the **People** menu, for example, **Practitioners**, **External Practitioners**, or **Staff**. A table of existing users displays on the left hand side and a form to create a new user displays on the right, for example, **Create New Member of Staff**.

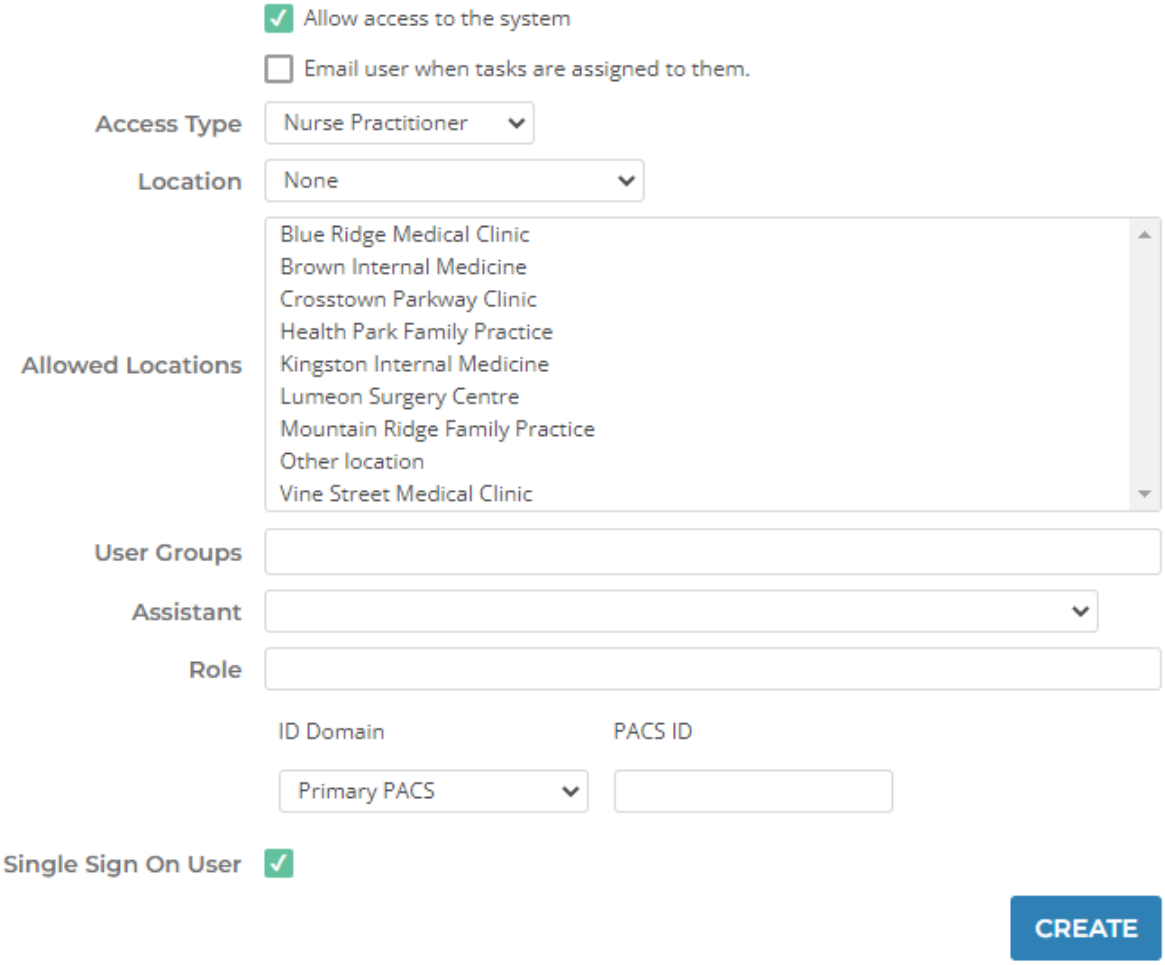


4. Fill in the required fields for the new user.

5. Enter the user's UPN in the **Email** field. You must enter the UPN so that it exactly matches the user's UPN that has been pre-provisioned by your organization, otherwise single sign-on will not work. If you are unsure what the user's UPN is, you can confirm with your IT team. It may be their Windows login or what they use to sign into other applications.

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6. Scroll down and select **Allow access to the system** and select an option in the drop-down list in the **Access Type** field based on the level of access you want the user to have.



7. Select the **Single Sign On User** checkbox.

8. Click **Create**.

Manage multiple log-ins

Some users may need multiple user types to access different roles in Conductor. For example, a user may want to log in as an administrator and as a nurse. In this scenario, you must create two separate users in Conductor that each have a unique email ID. These additional users cannot log in using SSO.

To do this, we recommend adding something to the beginning of the user's normal email address, separated by the **@** symbol. For example, if **jane@lumeonhealthcare.org** has a Conductor account as an administrator and wants a nurse user as well, you could create the user with an email ID of something like **nurse@jane@lumeonhealthcare.org**.

See *Create a new SSO user in Conductor (page 5)* to create the SSO user using their normal email address.

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Set up a user that does not use SSO

To create an additional user using a different email address:

1. Select the correct user type in the **People** menu, for example, **Practitioners**, **External Practitioners**, or **Staff**. A table of existing users displays on the left hand side and a form to create a new user displays on the right, for example, **Create New Member of Staff**.
2. Fill in the required fields for the new user.
3. Enter the user's alternative email address in the **Email** field. For example, **nurse@jane@lumeonhealthcare.org**.
4. Scroll down and select **Allow access to the system** and select an option in the drop-down list in the **Access Type** field based on the level of access you want the user to have.
5. Do not select the **Single Sign On User** checkbox.
6. Click **Create**.

Disable Conductor access for an SSO user

You must revoke access via the identity provider. This in turn stops the user from being able to access Conductor. This only comes into effect when the user next attempts to log in to Conductor. It does not take immediate effect if, for example, the user is already successfully authenticated and logged into Conductor.

Contact Lumeon Support for more information on how to do this.

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Two factor authentication

Your organization may require the assurance of extra security when using a web-based system. A benefit of a web-based system is that it allows users to log in from anywhere, but this can also cause concerns for some users. Two factor authentication (2FA) enables Conductor to guarantee that the user attempting to log in is who they say they are by sending a token to the user at the moment they log in.

Detail of functionality

When logging into Conductor, it sends either an SMS message to the mobile phone number of the user attempting to log in, or an email to their registered email address. Conductor prompts the user to enter the token contained in the SMS or email. If the user has logged in from this device within a set period, for example, within the last month, then Conductor does not send an SMS or email because we can be relatively certain that the user is in the familiar place so we do not need to reassert their credentials.

Conductor can also limit access of the user from specific IP addresses to ensure that, whether or not they are sent a token, the location of the user can be guaranteed.

In the context of two factor authentication, a user may be:

- An internal user such as an administrator, a clinician, or a reviewer.
- A patient accessing the patient portal.
- An external user, such as a company user or a referrer.

Limitations of functionality

The system is not an RSA token system and, if the user does not have a mobile phone signal or is unable to receive emails, they will not be able to access Conductor. There may be a delay of up to one minute between logging in and being allowed to proceed.

Configure 2FA

If your organization wants to use two factor authentication (2FA), contact Lumeon Support so that we can configure it for you.

Set up 2FA

Then you can set up two factor authentication for your users:

- Set up the 2FA security points - see *Two factor authentication security points (page 9)*.
- Set up the 2FA options - see *Set up two factor authentication options (page 9)*.

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Two factor authentication security points

System administrators and Lumeon Support have access to security point settings which can enable or disable visibility of Conductor functionality for other users.

Lumeon usually performs initial configuration of security points but system administrators can update these settings.

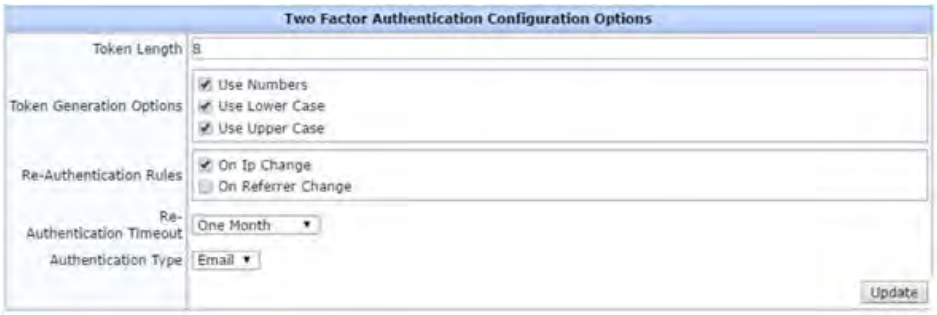
If two factor authentication (2FA) core configuration is enabled, the following security points control access to 2FA functionality:

Name	Description
`Options.TwoFactorAuthentication`	**Can View** - Controls access to the **Two Factor Authentication Configuration Options** page.
`TwoFactorAuthentication.Required`	**Can View** - Controls two factor authentication for the selected user access types.

Set up two factor authentication options

To set up the two factor authentication (2FA) options:

1. Select **Two Factor Authentication** in the **Configuration** menu. The **Two Factor Authentication Configuration Options** page displays.



2. Enter the required details using the table of fields below - see *Two factor authentication fields (page 10)*.

3. Click **Update**.

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After you have set up these 2FA configuration options and a user has entered a correct username and password, Conductor sends either an SMS message to the mobile phone number of the user attempting to log in or an email to the registered email address of the user. Conductor then prompts the user to enter the token contained in the SMS or email.



When the user enters the code they have received and clicks **Authenticate me**, they will now be authenticated and have access to the system.

When Conductor sends authentication codes depends on the following 2FA configuration settings.

- **Re-Authentication Rules** - Checks whether the user is in the same location. If it is set, Conductor asks a user to authenticate every time they change location, for example, changing from working in the office to working from home.
- **Re-Authentication Timeout** - Ensures that a user must authenticate again after a set period, regardless of location. For example, if the setting is one month, then Conductor asks a user to re-authenticate one month after their last authentication.

Two factor authentication fields

Use the following table to complete the two factor authentication details.

Field name	Description
Token Length	Length of the token that is automatically generated.
Token Generation Options	Select if the generated token can contain numbers, lower case letters, and/or upper case letters.
Re-Authentication Mode	Select which method of re-authentication will take place, either through an IP change, or a referrer change.
Re-Authentication Timeout	Select a timeframe which will force the user to re-authenticate. Dates range from every day to one month.
Authentication Type	Select which authentication type is active, either SMS or email.

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Secure emails

Conductor has two ways of sending secure emails:

- Send an email to a secure domain.
- Send an email using a template that is marked as secure.

To configure and set up secure email domains, see *Secure email domains*.

To configure and set up secure emails via a template, see *Secure emails using templates*.

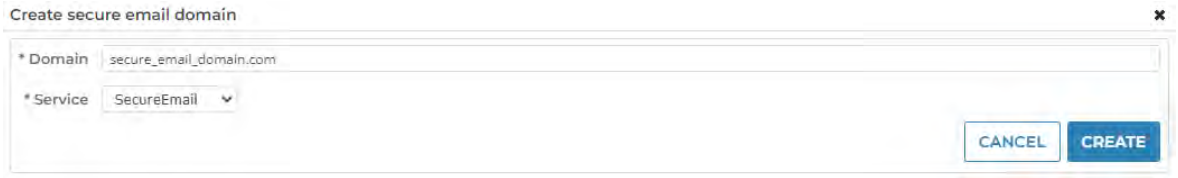
Set up secure email domains

System administrators can set up secure email domains that have TLS (Transport Layer Security) end-to-end encryption. If you set up an email domain as secure, when a pathway action sends an email to a recipient at that domain, it encrypts the email if the **Via secure email** checkbox is selected for that action.

If your organization wants to use secure email domains, contact Lumeon Support so that we can configure it for you.

To set up secure email domains:

1. Select **Secure Email Domains** in the **Communication** menu. A table of existing secure email domains displays.
2. Click **Create new** to display the **Create secure email domain** window.



3. Enter the name of the secure email domain in the **Domain** field.
4. Select the service from the drop-down list in the **Service** field. Options are:
   - **InsecureEmail** - Select this option if you do not want recipients at this email domain to receive encrypted emails.
   - **SecureEmail** - Select this option if you want recipients at this email domain to receive TLS end-to-end encrypted emails.
5. Click **Create**. Conductor adds the secure email domain to the table of secure email domains.

You can click **Cancel** next to a secure email domain in the table if you want to remove it from the list of secure email domains.

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Set up secure emails using templates

If your organization wants to send secure emails using a template which is marked as secure, please contact Lumeon Support so that we can configure it for you.

Secure email security points

System administrators and Lumeon Support have access to security point settings which can enable or disable visibility of Conductor functionality for other users.

Lumeon usually performs initial configuration of security points but system administrators can update these settings.

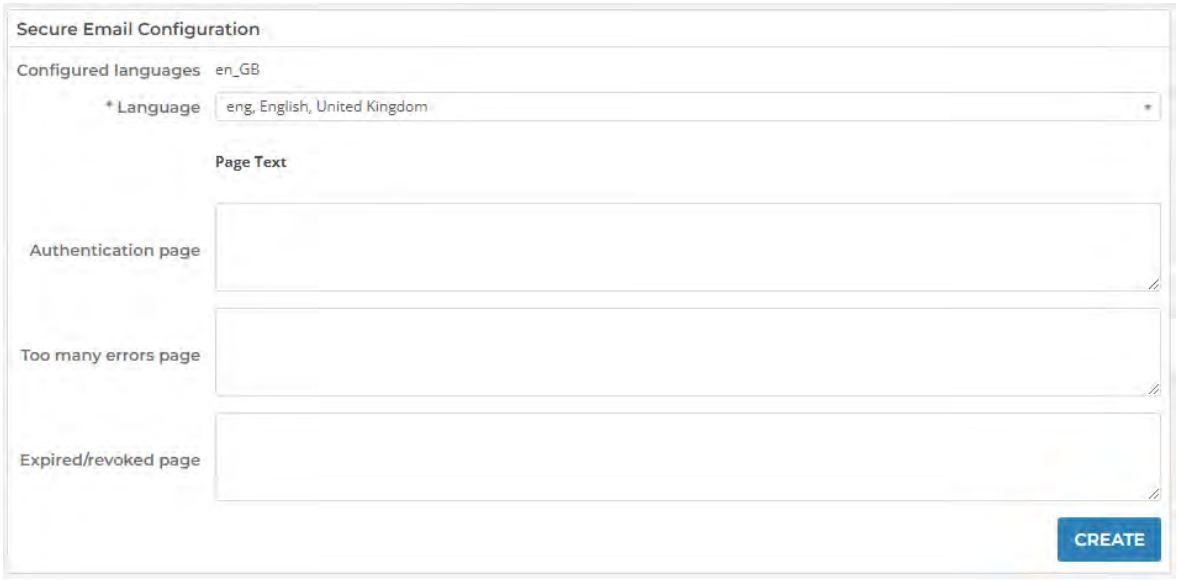
The following security points control access to secure email functionality:

Name	Description
`Communication.SecureEmailConfig`	**Can View** - Controls whether the **Secure Email** menu option is available in the **Communication** menu which enables access to the **Secure Email Configuration** page.
`Communication.SecureEmailLog`	**Can View** - Controls whether the **Secure Email Audit Log** menu option is available in the **Communication** menu which enables access to the **Secure Email Audit Log** page. **Can Edit** - Controls whether a **Revoke** button appears in the **Secure Email Audit Log** page which enables a user to revoke a secure email so that it can no longer be viewed by the recipient.

Set up text of secure email page

You can set up the text on the secure email page. To do so:

1. Select **Secure Email** in the **Communication** menu. The **Secure Email Configuration** page displays.



2. If you have more than one language configured, select the language from the drop-down list in the **Language** field, otherwise the default system language displays.

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3. Enter HTML content in the following fields:
   - **Authentication page** - Enter the HTML for the text that you want to display on the authentication page explaining what the recipient must do to view their secure email.
   - **Too many errors page** - Enter the HTML for the text that you want to display if the recipient enters an invalid authentication code too many times. The number of authentication attempts is a core configuration parameter.
   - **Expired/revoked page** - Enter the HTML for the text that you want to display if the secure email page has expired or been revoked. The length of time that the secure email page is valid is set in the email template.

   See *Example page text (page 13)* for some HTML examples.

4. Click **Create**.

Example page text

Authentication page

The following is an example for the **Authentication page** field.

```
<div class="pure-g">
    <div class="pure-u-1-1 no-padding">
        <h1 class="no-frame white">Secure message</h1>
    </div>
    <div class="page">
        <p class="body-1 white">
            You have received a secure message.
        </p>
    </div>
</div>
```

Too many errors page

The following is an example for the **Too many errors page** field.

```
<div class="pure-g">
    <div class="pure-u-1-1 no-padding">
        <h1 class="no-frame white">Too many errors</h1>
    </div>
    <div class="page">
        <p class="body-1 white">
            An error has occurred.
        </p>
    </div>
</div>
```

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Expired/revoked page

The following is an example for the **Expired/revoked page** field.

```
<div class="pure-g">
    <div class="pure-u-1-1 no-padding">
        <h1 class="no-frame white">Secure email unavailable</h1>
    </div>
    <div class="page">
        <p class="body-1 white">
            The email is no longer available.
        </p>
    </div>
</div>
```

Create invitation email template

You must create an email template for an invitation to open a secure email. To do this:

1. Select **Email Templates** in the **Pathway Logic** or **Communication** menu. The **Email Templates** page displays.
2. Click **New** to display the **Create Email Templates** page.
3. Enter the name of the template to indicate that it is an invitation to view a secure email.
4. Enter the CSS, HTML, and plain text. An example of the plain text is:

   ```
   You have received a secure email. Click on the following link to view:
   {{ secureEmailUrl }}
   ```

5. Enter the sender and subject of the email.
6. Click **Create** to save the email template.
7. Click **Return to HTML Template Management** to return to the table of existing email templates.
8. Search for the template you have just created and click **Activate**.

Attach invitation template

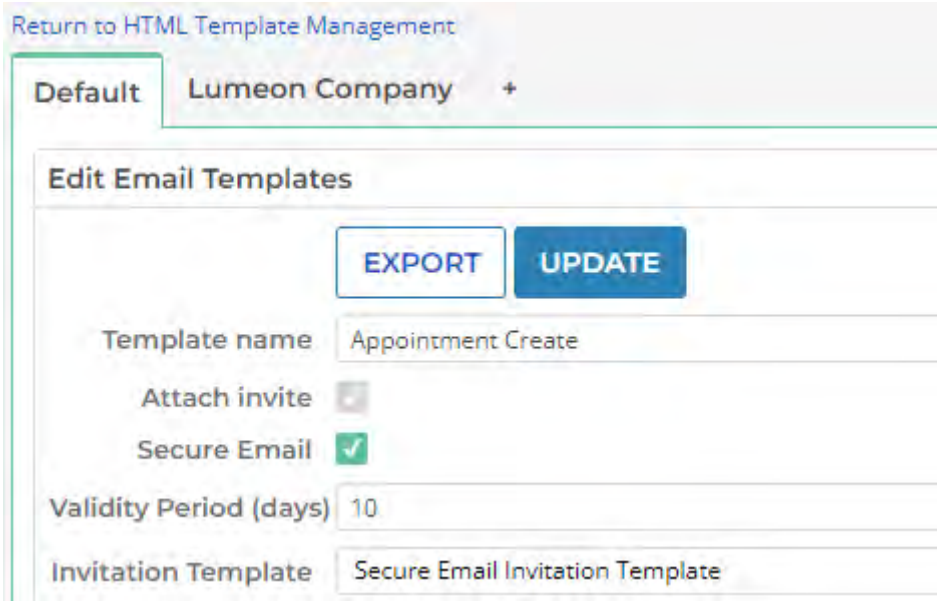
When you have an email that you want to send as a secure email, you must attach the invitation template to it. To do this:

1. Select **Email Templates** in the **Pathway Logic** or **Communication** menu. The **Email Templates** page displays.

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2. Click **New** to create a new email template. This displays the **Create Email Templates** page.

   If you want to update an existing email, search for and click on the name of the existing email template that you want to send securely. This displays the **Edit Email Templates** page. In this example, we will use the **Appointment Create** since it is easy to send emails with this template.



3. Select the **Secure Email** checkbox. This displays the **Validity Period (days)** and **Invitation Template** fields.

4. Enter a validity period, in days. This determines how long the secure email is valid after it is sent.

5. Select the invitation template created previously from the drop-down list.

6. Enter the email template content in the HTML field. An example of this content is:

```
Name: {{ appointment.appointmentTypeName }}
Short name: {{ appointment.appointmentTypeNameShort }}
Start time: {{ appointment.startTime }}
Location: {{ appointment.location.name }}
comms scheme form links
{# {% for form in appointment.patientForms %} #}
    {# <a href="{{urlShorten(path('cui.route.form',
{'ID' : form.AnonymousFormID}), constant('Emma\\Request\\Core\
\UrlMapping::PURPOSE_FORMS'))}}">{{form.name}}</a> #}
{# {% endfor %} #}
```

7. Click **Update**.

8. Click **Return to HTML Template Management** to return to the table of existing email templates.

9. Search for the template you have just created or updated and click **Activate**.

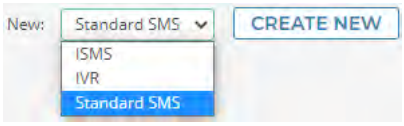
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Create SMS and IVR templates

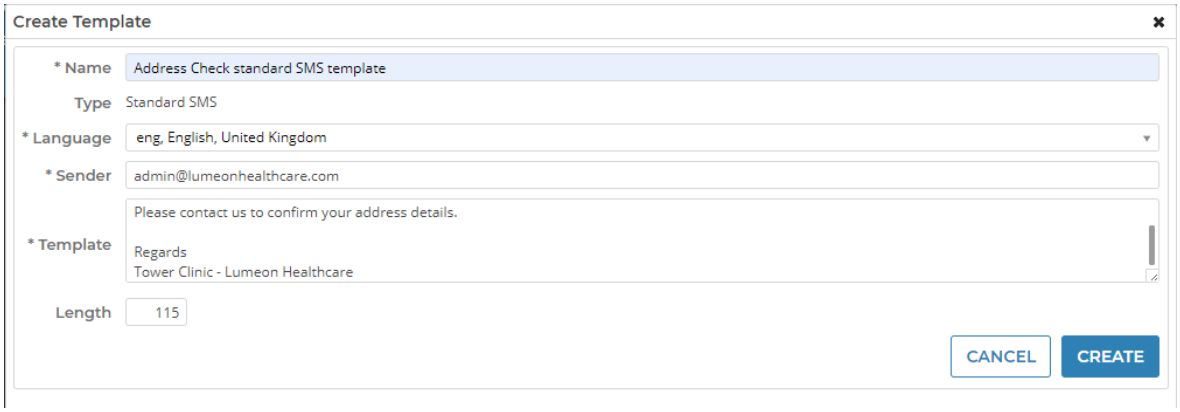
Create a new standard SMS template

To create a new standard SMS template to send an authentication code:

1. Select **Standard SMS** in the drop-down list in the **New** field.



2. Click **Create New** to display the **Create Template** page in a new window.



3. Complete the fields using the table in *Standard SMS template fields (page 16)* to create a new standard SMS template.

   Enter the name **Security Code SMS** for the template because this is the name Lumeon assigned to this template in the core configuration.

   Enter the Twig variable `authenticationCode` in the **Template** field to include the authentication code in the SMS. For example:

   ```
   Your secure message code is {{ authenticationCode }}.
   ```

4. When you have finished, click **Create**. The new standard SMS template displays in the list of templates.

See ***SMS Messages in Lumeon Conductor*** for more information on creating translations of an SMS template, and viewing and using SMS messages.

Standard SMS template fields

Complete the standard SMS template using the fields in the following table. Fields with an asterisk (*) are mandatory.

Field	Description
Name *	Enter the name of the standard SMS template.
Type	You have selected to create a standard SMS template. You cannot change this. If you want a different template, click **Cancel** to return to the **SMS & IVR Templates** page and select the correct template type.
Language *	Enter the language for the standard SMS template.
Sender *	Enter the sender of the standard SMS message.

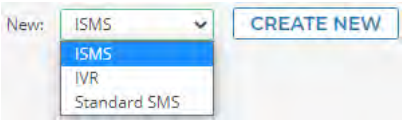
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Field	Description
Template *	Enter the text for the standard SMS message. You can include Twig tags and merge tags in your message.
Length	As you enter the text in the **Template** field, the number of characters displays here. You can use this to ensure that your message is the length of a single SMS message.

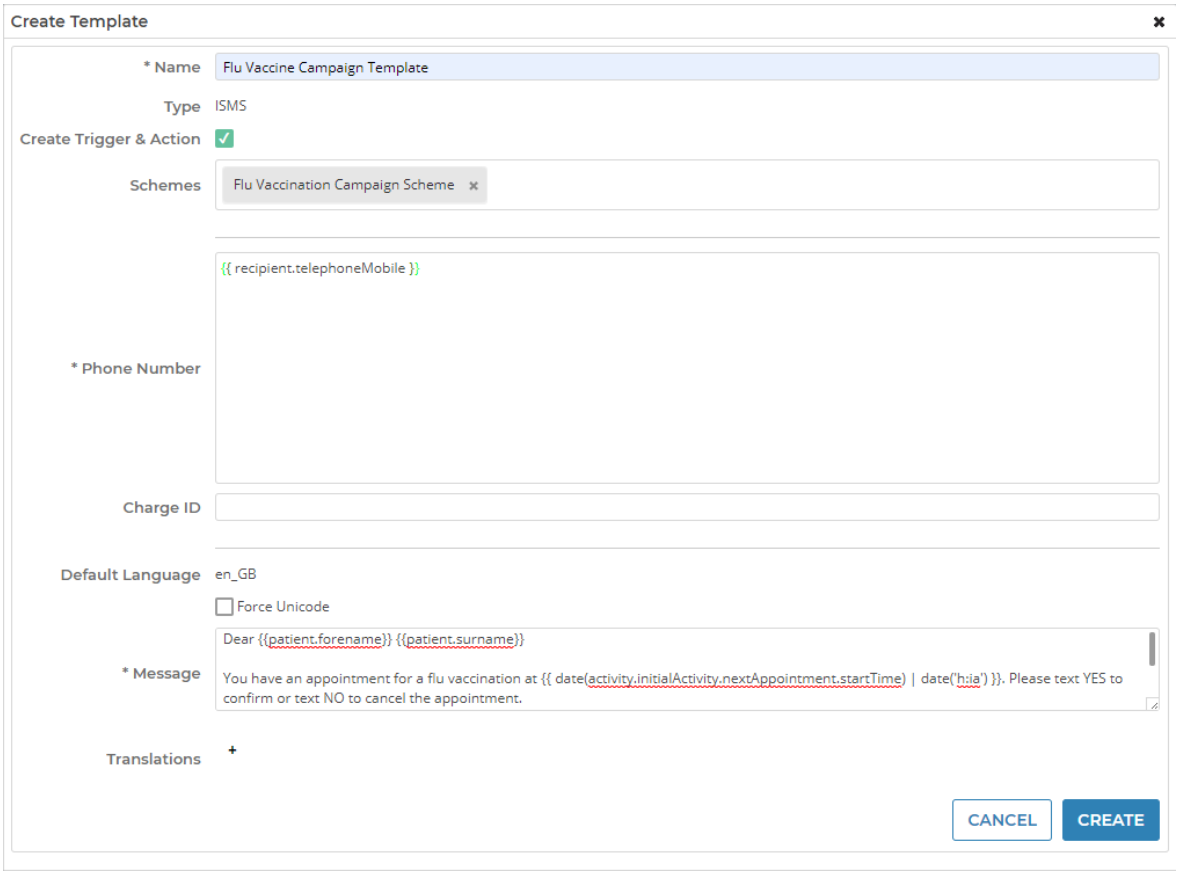
Create a new ISMS template

To create a new ISMS template to send an authentication code:

1. Select **ISMS** in the drop-down list in the **New** field.



2. Click **Create New** to display the **Create Template** page in a new window.



3. Complete the fields using the table in *ISMS template fields (page 18)* to create a new ISMS template.

   Enter the name **Security Code SMS** for the template because this is the name Lumeon assigned to this template in the core configuration.

   Enter the Twig variable `authenticationCode` in the **Template** field to include the authentication code in the SMS. For example:

```
{ "msisdn": "{{ recipient.telephoneMobile }}", "message": "Your secure
message code is {{ authenticationCode }}"}
```

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4. When you have finished, click **Create**. The new ISMS template displays in the list of templates.

See ***SMS & IVR Messages in Lumeon Conductor*** for more information on previewing and creating translations of an ISMS template, statutory requirements, and using ISMS messages.

ISMS template fields

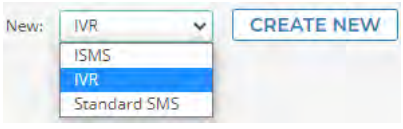
Complete the ISMS template using the fields in the following table. Fields with an asterisk (*) are mandatory.

Field	Description
Name *	Enter the name of the ISMS template.
Type	You have selected to create an ISMS template. You cannot change this. If you want a different template, click **Cancel** to return to the **SMS & IVR Templates** page and select the correct template type.
Create Trigger & Action	Select this to associate the ISMS template with a communications scheme. Triggers and actions with default names are created. If you do not do this now, you can do it later. If you select this, the **Schemes** field is displayed.
Schemes	Appears if you select the **Create Trigger & Action** check box. Select the communications scheme or schemes from the drop-down list.
Phone Number *	Enter the phone number that you want to use to send the ISMS message to. You can use Twig to provide the logic to select the appropriate phone number. The phone number must be a short code or a toll free number rented from your phone service provider - see *Phone number types* for more information.
Charge ID	Enter the charge ID for the ISMS message. This must be less than 30 characters long. It is used for billing purposes and is therefore normally the department or cost centre that is paying for the message.
Default Language	Displays the system default language. You cannot change this.
Force Unicode	You must select this if you include emojis or special characters in the ISMS message. Conductor defines some languages, such as Russian and Arabic, as using Unicode, in which case, this check box is automatically selected.
Message *	Enter the text for the ISMS message in the system default language. You can use Twig tags, include tags, and emojis in your message. When Conductor creates a message for a patient, it replaces the Twig tags and include tags with the appropriate information for that specific patient, for example, with their name or appointment time. See *Emojis* and *Include tags* for more information.
Translations	If your organization uses multiple languages, you can enter the appropriate language translations now or you can update the template later. See *Create ISMS translations*.

Create a new IVR template

To create a new IVR template to send an authentication code:

1. Select **IVR** in the drop-down list in the **New** field.



2. Click **Create New** to display the **Create Template** page in a new window.

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3. Complete the fields using the table in *IVR template fields (page 19)* to create a new IVR template.

   Enter the name **Security Code IVR** for the template because this is the name Lumeon assigned to this template in the core configuration.

   Enter the Twig variable `authenticationCode` in the **Variable Message** field to include the authentication code in the IVR message.

   ```
   Hello {{ recipient.name.forename }}. Your code is
   {{ authenticationCode }}.
   ```

4. When you have finished, click **Create**. The new IVR template displays in the list of templates.

See ***SMS & IVR Messages in Lumeon Conductor*** for more information on previewing and creating translations of an IVR template, statutory requirements, and using IVR messages.

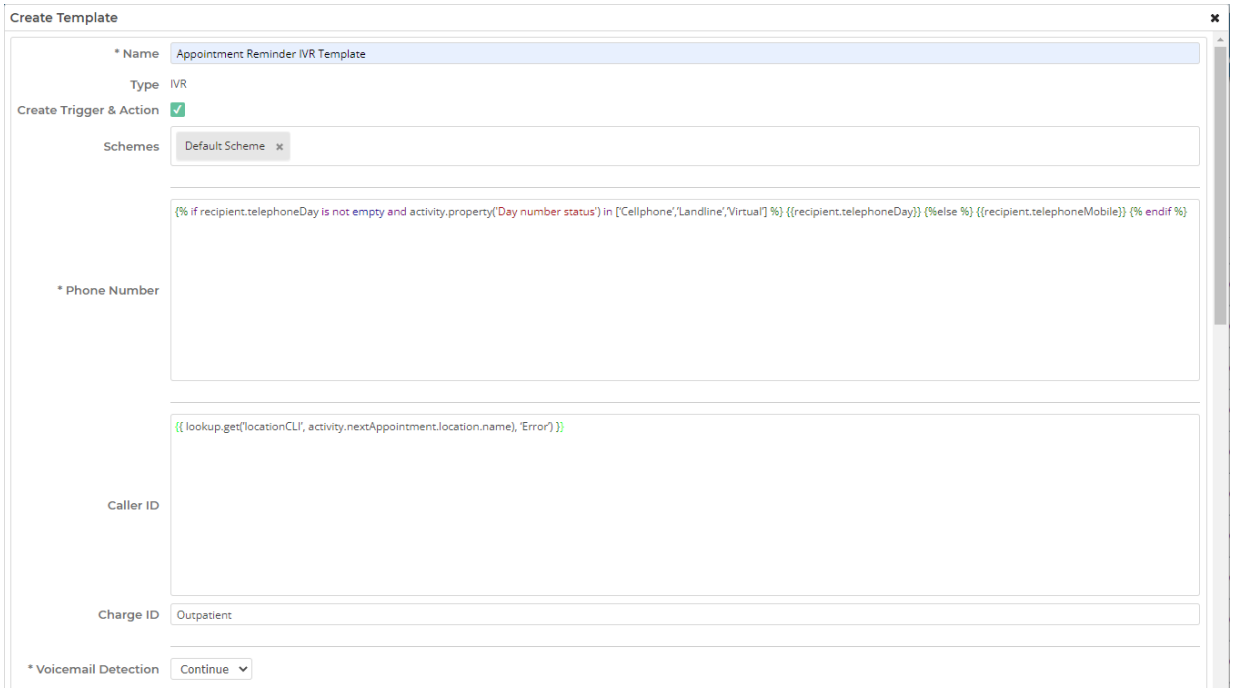
IVR template fields

Complete the IVR template using the examples and the fields in the following tables.

Conductor controls your ability to view, add, edit, or delete call state information using a security point setting. This is to ensure that users cannot accidentally change the complex logic of an IVR template. Contact Lumeon Support if you want to change the settings for certain users in your organization.

IVR general template fields

The following fields display in the general section of the **Create IVR Template** window.



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Complete the following fields for the IVR template. Fields with an asterisk (*) are mandatory.

General template field	Description
Name *	Enter the name of the IVR template.
Type	You have selected to create an IVR template. You cannot change this. If you want a different template, click **Cancel** to return to the **SMS & IVR Templates** page and select the correct template type.
Create Trigger & Action	Select this to associate the IVR template with a communications scheme. Triggers and actions with default names are created. If you do not do this now, you can do it later. If you select this, the **Schemes** field is displayed.
Schemes	Appears if you select the **Create Trigger & Action** check box. Select the communications scheme or schemes from the drop-down list.
Phone Number *	Enter the phone number that you want to use to send the IVR message to. You can use Twig to provide the logic to select the appropriate phone number.
Caller ID	Enter the caller ID for the IVR message. This is the calling number that appears on the patient's phone. You can use Twig to provide the logic to select the appropriate phone number. If the number used has not been rented from a phone service provider, Lumeon must provide the provider with evidence of ownership. You must provide this evidence, usually in the form of a bill. For example, you may want to use location specific phone numbers so that if a patient calls back on the number, they connect to the correct clinic.
Charge ID	Enter the charge ID for the IVR message. This must be less than 30 characters long. It is used for billing purposes and is therefore normally the department or cost centre that is paying for the message.
Voicemail Detection	Select the option from the drop-down list of what you want to happen if the phone service provider determines that the call goes to voicemail when it is answered: 1. **Continue** - Continue with the IVR message. If you select this option, you can enter an IVR message for this. This voicemail message is played to the patient. The phone service provider notifies Conductor at the end of the call whether a human or voicemail answered the call. 2. **Hang up** - Hang up and do not continue the call. 3. **None** - Voicemail detection is turned off. Voicemail detection is only 60-80% reliable. In some cases, a human answers the call but the phone service provider identifies the call as voicemail. In other cases, voicemail answers the call but phone service provider identifies it as a human answering it. Therefore, it is important to take this into account when designing call menus so that appropriate behaviour is provided for all these cases.

IVR call state matrix fields

An example of a call state matrix is shown below.



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Create the call state matrix using the following fields:

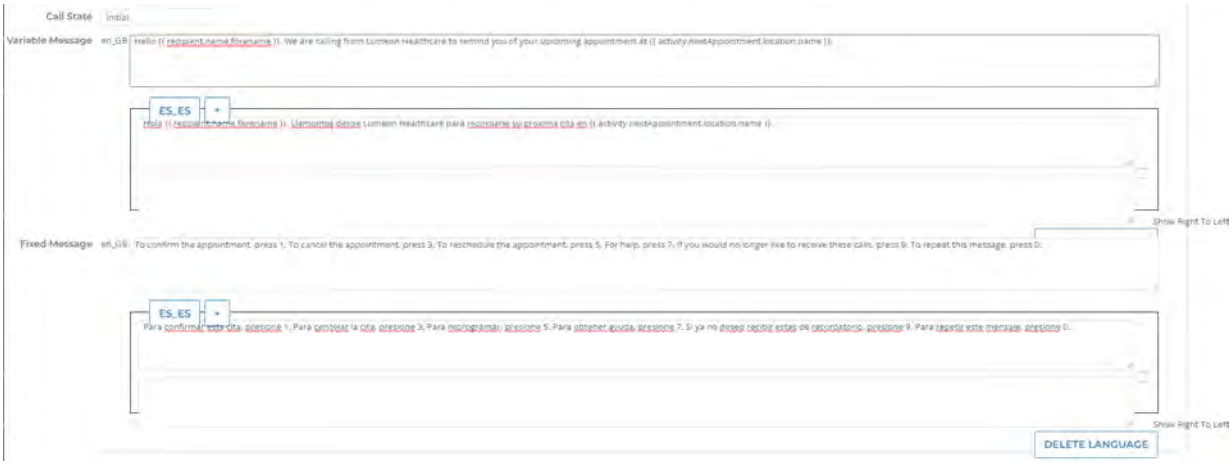
Call state matrix field	Description
Call State	Name of the call state. The first call state (after the voicemail call state, if included) is **Initial**. This is the initial IVR message that the patient receives. To add a call state, enter the call state in the **Add call state name** field and click **Add Call State**.
Label	Each call state is automatically assigned the next letter in the alphabet. You cannot change this.
Action	For the voicemail call state, the action is **None** because no further action can be taken after the message is delivered to the patient. For all other call states, select the action from the drop-down list: · **None** - End the call after the message is delivered to the patient. · **Collect Digit** - The patient presses a digit or the * or # keys on their telephone keypad. Enter the response for each button on the keypad. The call moves to another call state in the matrix depending on the patient's response. · **Connect** - The patient is connected to a phone number within your organization. · **Collect Digits** - You expect the patient to enter a number of digits, for example, the patient's year of birth.
Repeat	Select: · **Yes** - If you want the IVR message to be repeated. You are strongly advised to repeat the voicemail message because the first part of the message overlaps with the voicemail announcement and is not recorded. · **No** - If you do not want the IVR message to be repeated.
Check Length	If you selected the **Collect Digits** action, a check box appears in this column. Select if you want the IVR process to check the number of digits entered by the patient. For example, you may want to check that they have entered 4 digits for their year of birth.
1 - 9, 0	Required if the action is **Collect Digit**. For each digit, enter the call state that you want the IVR process to move to when the patient presses that digit on their telephone keypad. You can leave digits blank if you do not want to use them. For example, your initial call state may ask the patient to "Press 1 to confirm an appointment or press 3 to cancel it". You would add a call state **Confirm** which is automatically assigned the label B and a call state **Cancel** which is automatically assigned the label C. Select B (Confirm) from the drop-down list under the digit 1 and select C (Cancel) from the drop-down list under the digit 3.
#	If the action is **Collect Digit**, enter the call state that you want the IVR process to move to when the patient presses **#** on their telephone keypad.
*	If the action is **Collect Digit**, enter the call state that you want the IVR process to move to when the patient presses ***** on their telephone keypad. If the action is **Collect Digits**, enter the call state to move to if the patient enters the correct number of digits.
{}	If the action is **Collect Digit** or **Collect Digits**, enter the call state to move to if the patient does not press any buttons on their telephone keypad. For example, you may want to repeat the message.
?	If the action is **Collect Digit**, enter the call state to move to if the patient presses a button that does not have a call state assigned to it. For example, you expect the patient to press 1, 3, 5, 7, or 9, and they press 2. In this case, you may want to repeat the message. If the action is **Collect Digits** and you have selected the **Check Length** check box, enter the call state to move to if the patient enters an invalid number of digits. For example, you may want to repeat the message.

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IVR call state details

For each row of the call state matrix, enter the details of this state in the following sections. Examples of call state details for **Voicemail** and **Initial** case states are shown below.





For each call state in the matrix, complete the following fields. Fields with an asterisk (*) are mandatory.

Call state details field	Description
Call State	The name of the call state that you entered in the call state matrix. You cannot change this.
Variable Message	Enter the variable text for the IVR message in the default language. You can use Twig tags and include tags in your message. When Conductor creates a message for a patient, it replaces the Twig tags and include tags with the appropriate information for that specific patient, for example, with their name or appointment time. The variable message is played first followed by the fixed message. See *Include tags* for more information. Variable messages can contain ***SSML*** (speech-synthesis markup language) to format the message, such as incorporating pauses in the message, or defining how to pronounce acronyms, dates, and times.
Translations	If your organization uses multiple languages, you can enter the appropriate language translations for the variable message now or you can update the template later. See *Create IVR translations*.

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Call state details field	Description
Fixed Message	Enter the fixed text for the IVR message in the default language. This text is the same for every patient. Normally, this is the last part of the message which, for example, states the menu options available, such as "Press 1 to confirm, 3 to cancel, ...". It can include Twig tags or include tags which must evaluate to the same text for every patient before the message is sent to the API gateway. For example, an include tag could contain the name of the organization so that if it changes, you only need to change it in one place. Another example is an include tag that contains the text "Press 1 to confirm, 3 to cancel, ..." to simplify the fixed message and avoid repetition. See *Include tags* for more information. Fixed messages can contain ***SSML*** (speech-synthesis markup language) to format the message, such as incorporating pauses in the message, or defining how to pronounce acronyms, dates, and times.
Translations	If your organization uses multiple languages, you can enter the appropriate language translations for the fixed message now or you can update the template later. See *Create IVR translations*.
Connect To *	Displays if you selected the action **Connect** in the call state matrix. Enter the telephone number that the recipient is to be connected to, for example, if they pressed the digit to reschedule the appointment or to get help.
Call Context	Displays if you selected the action **Connect** in the call state matrix. Enter the context for the call.

Set up communication schemes

You must configure the communication schemes for sending the authentication email, SMS, or IVR message. To do this:

1. Select **Schemes** in the **Communication** menu.
2. Configure the **Default Scheme** to use the appropriate email, SMS, and IVR templates.
3. Click **Save**.
4. Repeat for **Self-Payor** and click **Save**.

View secure email audit log

System administrators can view the audit log for secure emails. This menu option is controlled by a security point. If you cannot see it and want to access to it, contact your system administrator or Lumeon Support.

To view the audit log for secure emails:

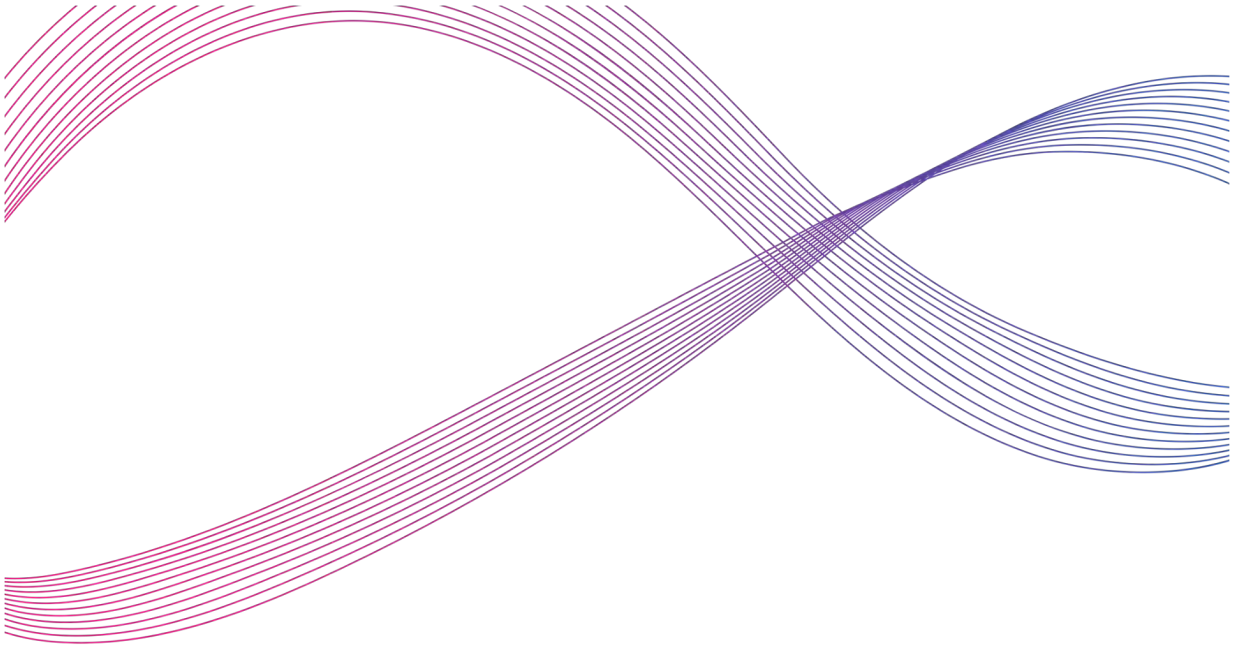
1. Select **Secure Email Audit Log** on the **Communication** menu. The **Secure Email Audit Log** page displays.

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2. Enter the search criteria that you want to use to search for audit logs:
   - **First Name** - Enter the first name of the email recipient.
   - **Last Name** - Enter the last name of the email recipient.
   - **Email Address** - Enter the email address of the email recipient.
   - **Email Status** - Select the email status from the drop-down list. Options are:
     - **Email Sent** - A secure email has been sent to the recipient.
     - **Auth Page Opened** - The recipient has opened the authentication page.
     - **Too Many Attempts** - The recipient entered the authentication code incorrectly too many times.
     - **Revoked** - An administrator has revoked access to the secure email.
     - **Secure Email Read** - The recipient has read the secure email.
   - **Date Sent** - Enter a date range when the emails were sent.
3. Click **Search**. A page displays containing all secure emails that meet the search criteria.

If a recipient has not read a secure email, they have not entered the authentication code incorrectly too many times, and the secure email has not expired or been revoked, you can click **Revoke** to revoke access to the secure email. This means that the recipient will no longer be able to view it. The **Revoke** button is controlled by a security point. If you cannot see it and want to access to it, contact your system administrator or Lumeon Support.

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SMS Messages in Lumeon Conductor 24.2

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Introduction

Lumeon Conductor can send standard non-interactive messages to patients and users. For example, you may want to send a message to patients to enable them to book an appointment for a flu vaccination, to confirm or remind them of an existing appointment, to fill in a form, or to enable them to sign into the patient portal. You may want to send messages to a new user to enable them to sign into Conductor, or to an existing user who needs to change their password or has locked themselves out.

Conductor can also send interactive SMS (ISMS) and interactive voice (IVR) messages. Contact your Lumeon account manager if you are interested in this functionality.

See *https://en.wikipedia.org/wiki/SMS* for more information on SMS and *https://en.wikipedia.org/wiki/Interactive_voice_response* for more information on IVR.

SMS functionality

Conductor can send standard SMS messages as an action within a care pathway. See ***Pathways in Lumeon Conductor*** for an introduction to pathways and how they are used. Conductor can also send a standard SMS message to remind a patient about an appointment or to provide a secure link so that they can fill in a form. When standard SMS messages are sent, the recipient cannot reply.

Conductor uses SMS templates to provide the information required in the message. You can create new templates or edit existing ones, or Lumeon can do it for you. If multiple language support is enabled for your organization, you can create SMS templates in different languages. Conductor uses patients' language preferences to send the SMS message in the appropriate language.

Purpose

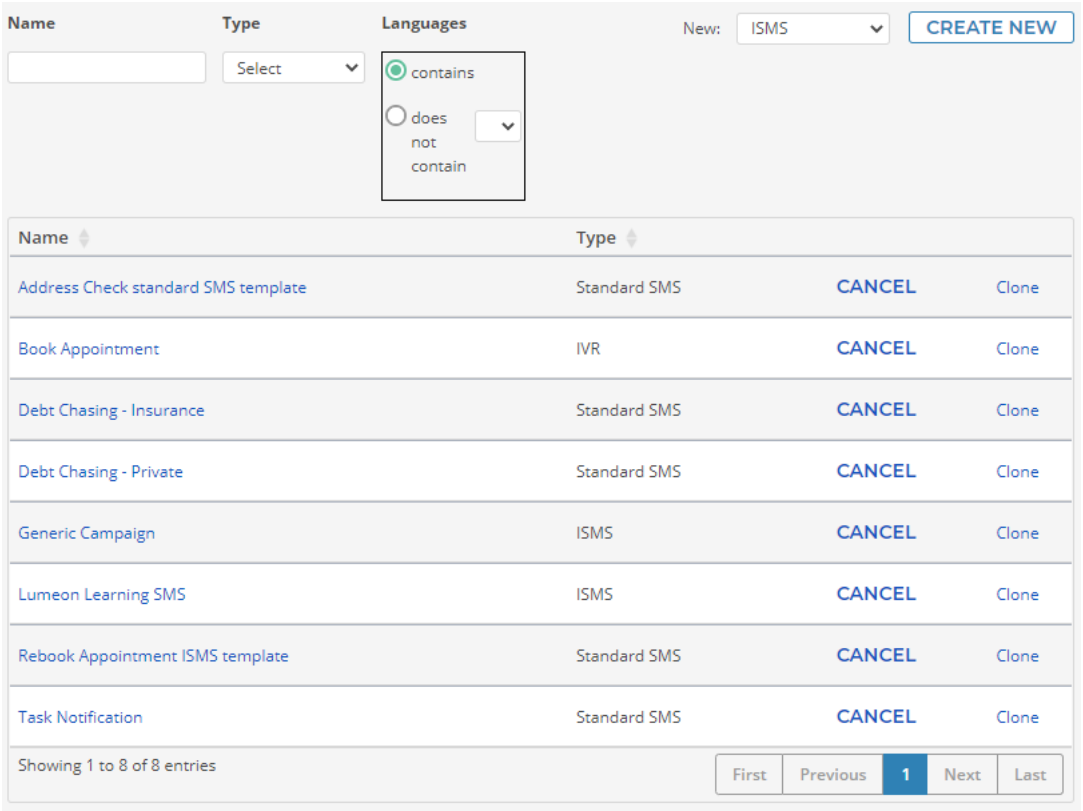
The purpose of this document is to:

1. Describe how to view SMS templates in Lumeon Conductor. See *View SMS templates (page 4)*.
2. Explain how to use the SMS template functionality to set up standard SMS templates. See *Standard SMS templates (page 7)*.
3. Describe the languages that Conductor uses. See *Languages in SMS templates (page 10)*.
4. View the security point settings that affect SMS and IVR functionality. See *Security points (page 13)*.

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View SMS templates

To view SMS templates, select **SMS Templates** in the **Communication** or **Pathway Logic** menu. This displays a list of existing SMS templates.



You can view templates with a **Type** of **Standard SMS**. Standard SMS messages are non-interactive - a message is sent but the recipient cannot reply.

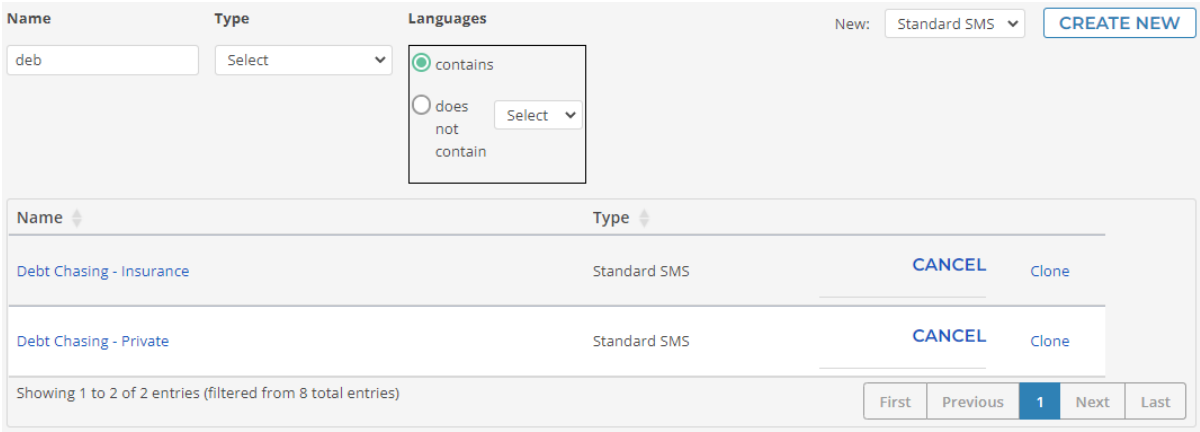
Contact Lumeon Support if you want to use interactive SMS and/or interactive voice response (IVR) functionality.

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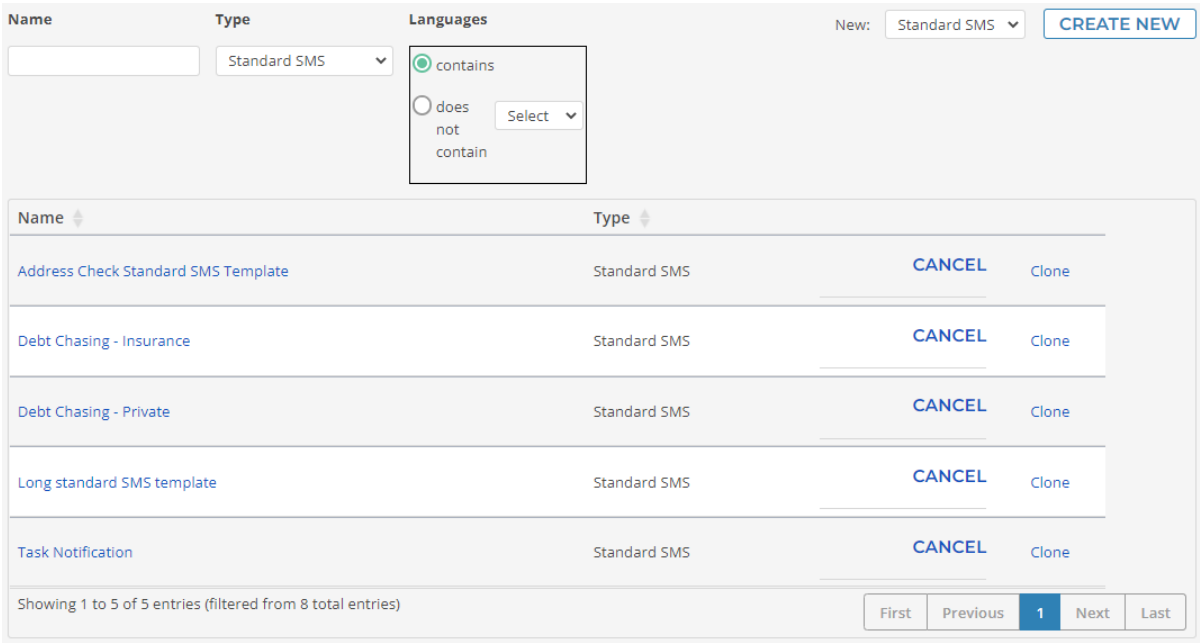
Search for a template

You can search for templates in the following ways:

- **Name** - Start typing text in the name of the template and a list of templates that include the text are displayed as you type.

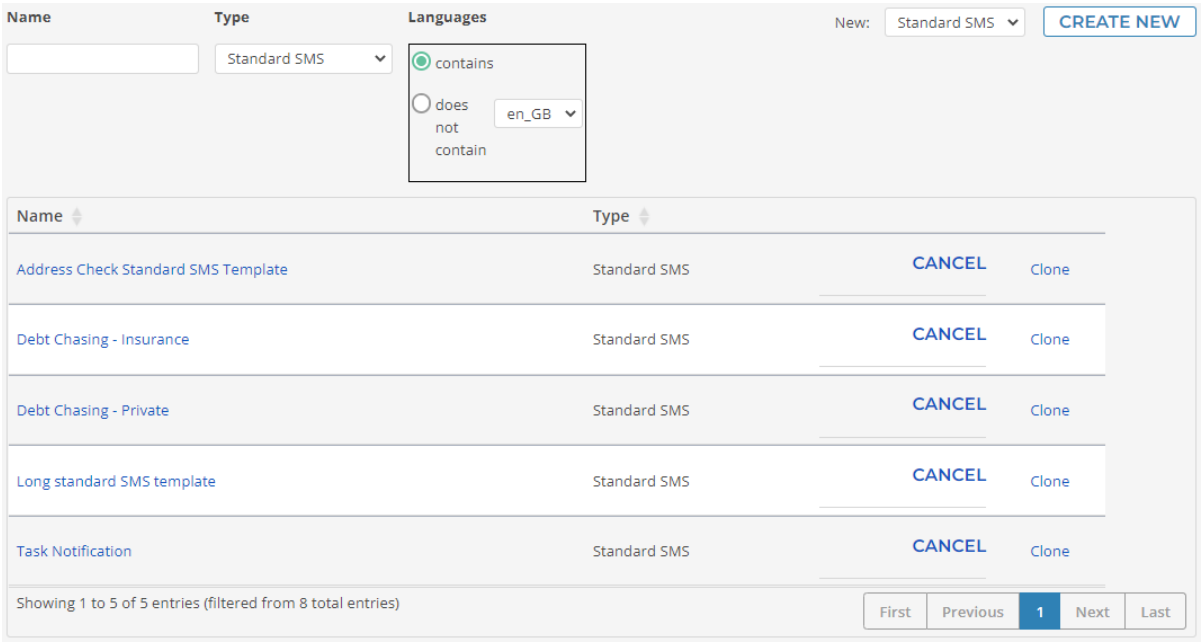


- **Type** - Select **Standard SMS**, from the drop-down list to display only templates of that type.



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- **Languages** - You can find templates that either include or exclude a particular translation. Click **contains** or **does not contain** and then select the language from the drop-down list. This is useful if you want to find templates where a particular language translation needs updating or is missing.



Actions

The following actions are available for each template:

- **Cancel** - Click to delete the template. Conductor asks you to confirm that you want to delete it.
- **Clone** - Click to create a clone of the template. Conductor creates a copy of the template with **[Clone]** in front of the name. You can then edit the name and the contents of the template.

If you have more than one page of SMS and IVR templates, you can use the following options:

- **First** - Click to display the first page of templates.
- **Previous** - Click to display the previous page of templates.
- **[Number]** - Click on a number to display that page of templates.
- **Next** - Click to display the next page of templates.
- **Last** - Click to display the last page of templates.

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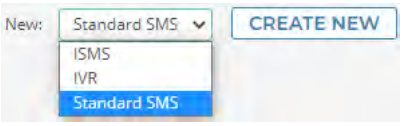
Standard SMS templates

Conductor can be configured to automatically send standard non-interactive SMS messages to patients, such as appointment confirmations or reminders.

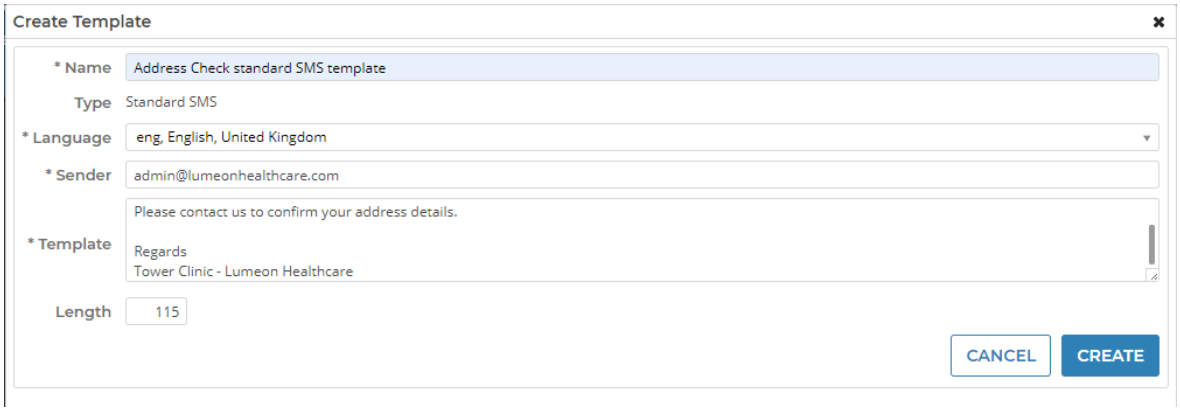
Create a new standard SMS template

To create a new standard SMS template:

1. Select **Standard SMS** in the drop-down list in the **New** field.



2. Click **Create New** to display the **Create Template** page in a new window.



3. Complete the fields using the table below to create a new standard SMS template.

4. When you have finished, click **Create**. The new standard SMS template displays in the list of templates.

To create translations of a standard SMS template, see *Create standard SMS translations (page 8)*.

Edit a standard SMS template

To edit a standard SMS template:

1. Select the template in the list of existing templates to display the **Update Template** window which you can then edit, or create additional language translations.

2. Change the fields as required using the table below.

3. If multiple languages are configured for your organization, you can add new translations or edit existing ones - see *Create standard SMS translations (page 8)*.

4. When you have finished, click **Update**.

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Standard SMS template fields

Complete the standard SMS template using the fields in the following table. Fields with an asterisk (*) are mandatory.

Field	Description
Name *	Enter the name of the standard SMS template.
Type	You have selected to create a standard SMS template. You cannot change this. If you want a different template, click **Cancel** to return to the **SMS & IVR Templates** page and select the correct template type.
Language *	Enter the language for the standard SMS template.
Sender *	Enter the sender of the standard SMS message.
Template *	Enter the text for the standard SMS message. You can include Twig tags and merge tags in your message.
Length	As you enter the text in the **Template** field, the number of characters displays here. You can use this to ensure that your message is the length of a single SMS message.

Create standard SMS translations

If multi-language configuration is enabled, you can create language translations for each SMS template.

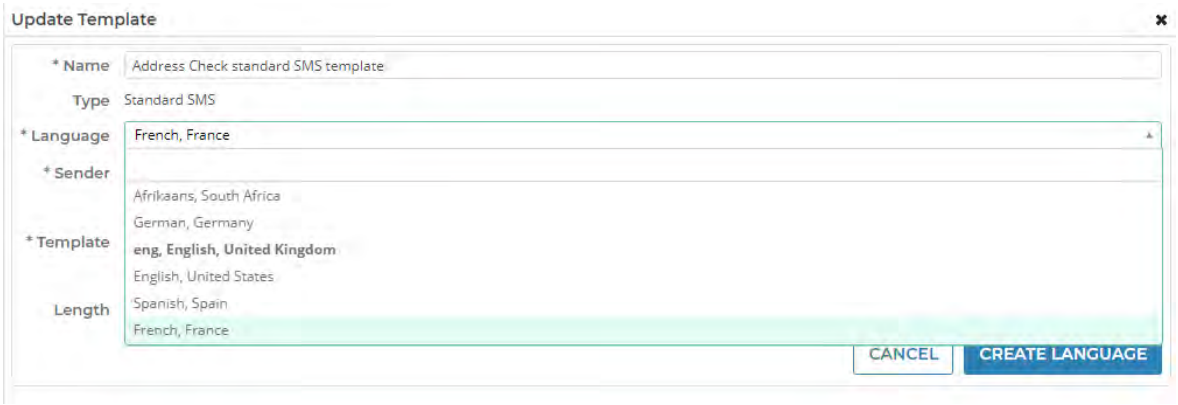
You can use the **Languages** filter at the top of the table to search for templates that either include or exclude a particular translation. Click **contains** or **does not contain** and then select the language from the drop-down list. This is useful if you want to find templates where a particular language translation needs updating or is missing.

To create a language translation for a standard SMS template:

1. Select the template in the list of existing templates to display the **Update Template** window.

2. You may want to copy the text in the **Template** field for the default language so that you can paste it into the same field in the new translation, especially if you have Twig tags or merge tags in the template.

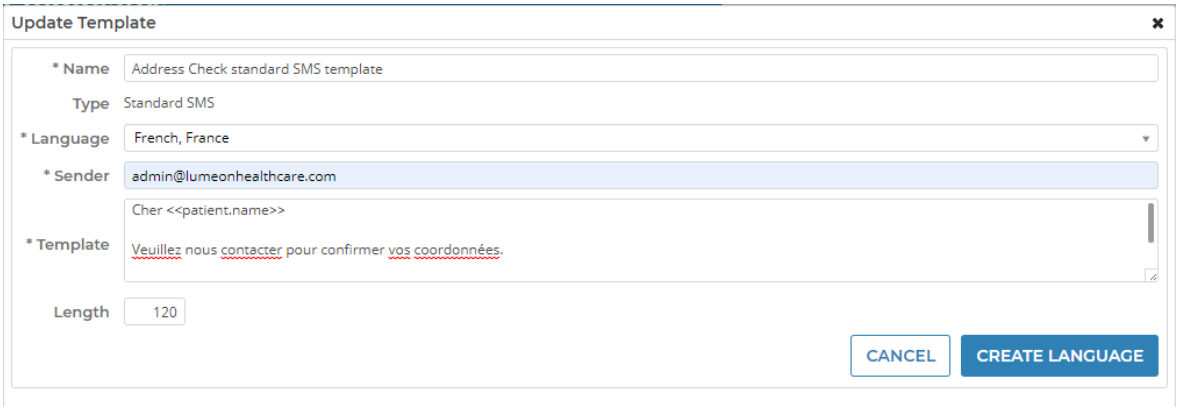
3. In the **Languages** field, select the required language in the drop-down list. See *Languages in SMS templates (page 10)* for more information on using languages in Conductor.



4. Enter the sender of the standard SMS message.

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5. If you have copied the template text in the default language, paste it into the **Template** field for the new language translation. Replace the plain text in the original language with the new language while keeping the Twig tags and merge tags in place.

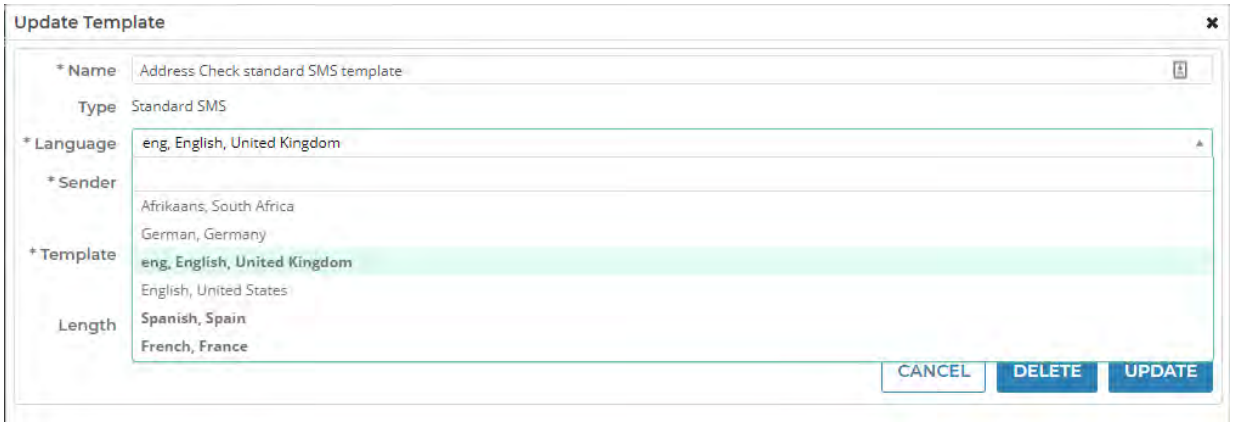


6. When you have finished, click **Create Language**.

You can change or update an existing translation. To do this:

1. Select the template in the list of templates,
2. Select the language that you want to update in the drop-down list in the **Languages** field.
3. Change the translation as required.
4. Click **Update**.

When you edit a template, you can see the translations you have created because they are highlighted in bold in the drop-down list.



You can remove a translation by selecting it in the drop-down list and clicking **Delete**.

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Languages in SMS templates

Language codes

All languages are supported for SMS. For IVR, languages are limited to those supported by either ***Vonage*** text-to-speech or Google text-to-speech.

Conductor can use the following codes for languages in IVR messages:

Language	Language code
Canadian French	fr-CA
Hatian Creole	ht-HT
Traditional Chinese	cmn-CHN
Arabic	ar-XWW
Bulgarian	bg-BG
German	de-DE
Greek	ell-GRC
English (American)	en-US
English (British)	en-UK
Persian Farsi	fa-IR
French	fr-FR
Gujarathi	gu-IN
Hebrew	heb-ISR
Hindi	hi-IN
Serbo Croatian	sr-RS
Hungarian	hun-HUN
Italian	it-IT
Japanese	ja-JP
Korean	ko-KR
Laotian	lo-LA
Other	
Dutch	nl-NL
Polish	pl-PL
Portuguese	pt-BR
Cantonese	yue-CHN
Haitian, NOS	
Romanian	ro-RO
Russian	ru-RU
Spanish	es-US
Thai	tha-THA
Turkish	tr-TR
Ukrainian	uk-UA
Urdu	ur-PK
Vietnamese	vi-VN
Yiddish	yi-IL
Swedish	sv-SE
Albanian	sq-AL
Armenian	hy-AM
Bengali	bn-BD

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Language	Language code
Danish	da-DK
Khmer	km-KH
Mandarin Chinese	cmn-CHN
Norwegian	nb-NO
Tagalog	tl-PH

Unicode

Depending on the language you use in your template, you may have to enable Unicode. Unicode enables you to send SMS messages with non-standard characters, meaning that you can send messages in any language. However, using Unicode severely limits the amount of characters that can be included in a text message. Without Unicode, the character limit for one chargeable SMS message unit is 160, but with Unicode it is only 70 characters. The tables in *SMS message length (page 11)* provide message lengths where the SMS unit count is greater than one. Therefore, Lumeon recommends that you only enable Unicode when necessary.

Conductor automatically selects Unicode for languages that always use non-standard characters such as Hindi, Urdu, Russian, and Chinese. Conductor does not automatically select Unicode for other languages such as Spanish, Creole, and French, because it is possible to send messages in those languages without using any non-standard characters. Therefore, if you are configuring a template for a language that uses the standard alphabet, but also uses non-standard characters, such as an accent or a tilde, you must select **Force Unicode** when you create the template.

SMS message length

Conductor adheres to SMS standards for message length.

The message unit size is 160 characters if it only uses the characters listed below.

```
! " # $ % ' ( ) * + , - . / : ; < = > ? @ _ ¡ £ ¥ § ¿ & ¤

0 1 2 3 4 5 6 7 8 9

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

a b c d e f g h i j k l m n o p q r s t u v w x y z

Ä Å Æ Ç É Ñ Ø ø Ü ß Ö à ä å æ è é ì ñ ò ö ù ü Δ
```

The following characters take up two character slots:

```
| ^ € { } [ ] ~ \
```

Messages are charged per unit. The table below gives message sizes and corresponding message unit counts. The table stops at six message lengths because this is the maximum number of message units that most carriers and handsets display as a single message.

Number of characters in message	Number of message units
<= 160	1
161 - 306	2
307-459	3

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Number of characters in message	Number of message units
450-612	4
613-765	5
755-918	6

Conductor sets some languages to use Unicode encoding as the default if their character set is known to include Unicode characters. You can be override this setting in the message template if necessary. Similarly, if a language does not default to using Unicode encoding and you include an emoji in the template, you can set the template to use Unicode encoding.

The message unit size for Unicode encoding is 70 characters.

The table below gives message sizes and corresponding message unit counts for Unicode encoded messages. The table stops at six message lengths because this is the maximum number of message units that most carriers and handsets display as a single message.

Number of characters in message	Number of message units
<= 70	1
71-134	2
135-201	3
202-268	4
269-335	5
336-402	6

Create templates for right to left languages

Lumeon recommends creating the SMS template text in a right to left text editor first. For example, *http://cutesoft.net/asp/right-to-left.asp*.

Copy the content from the right to left editor in between the quotation marks after `message:`. The content appears to be reversed in the SMS template, but it renders correctly when the SMS is sent. Currently, Conductor does not support beginning the message content with a Twig tag or having two Twig tags next to each other in right to left language templates.

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Security points

System administrators and Lumeon Support have access to security point settings which can enable or disable visibility of Conductor functionality for other users.

Lumeon usually performs initial configuration of security points but system administrators can update these settings.

The following security points control access to SMS and IVR functionality:

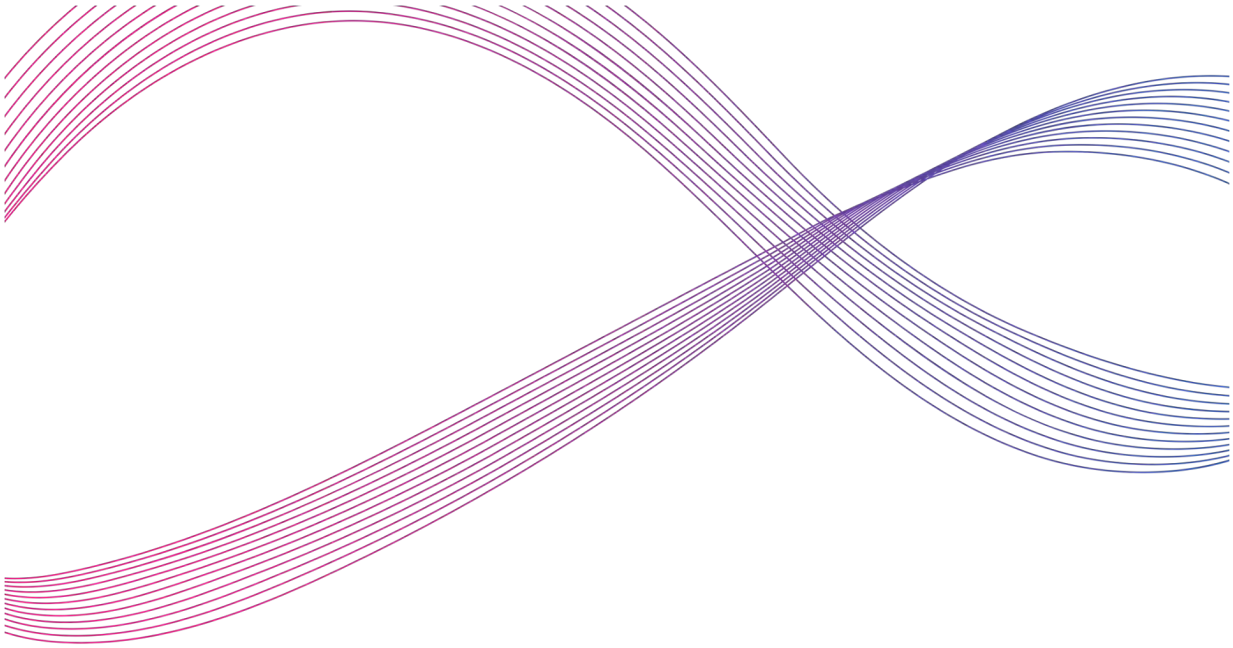
Security point	Description
`Communication.SMS`	**Can View** - Controls access to the **SMS Templates** or **SMS & IVR Templates** option in the **Pathway Logic** and **Communication** menus. The menu option name is determined by a core configuration parameter which controls whether or not interactive communication is available for your organization. If interactive communication is set up, your organisation can use interactive SMS and IVR messages. If not, your organization can use standard non-interactive SMS messages only.
`Communication.IVRCallStates`	Controls access to the call state information in an IVR template. It ensures that users cannot accidentally change the complex logic of an IVR template. **Can View** - Users can view the call state section of an IVR template. **Can Add** - Users can add new call states to an IVR template. **Can Edit** - Users can edit existing call states on an IVR template. **Can Cancel** - Users can delete call states from an IVR template.

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Glossary

Vonage	A telecommunications company and phone service provider that offers features such as toll free numbers and text-to-speech software. See *https://www.vonage.co.uk/* and *https://developer.vonage.com/voice/voice-api/guides/text-to-speech* for more information.

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Stock Management in Lumeon Conductor 24.2

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Introduction

Lumeon Conductor's stock control feature enables you to keep track of stock across multiple locations and to transfer items from one location to another. It can also prompt you to re-order, before stock runs out.

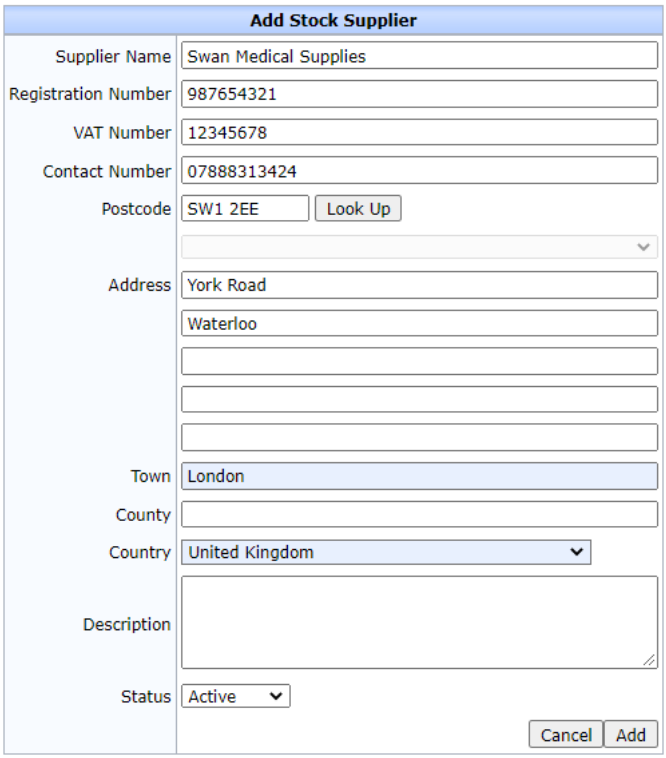
In Conductor, anything that is charged for, such as appointments, classes and booklets, is considered a product. Products that require stock control must be identified as such.

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Add stock suppliers

To add the details of a new stock supplier:

1. Select **Stock Suppliers** in the **Products** menu.
2. Complete the **Add Stock Supplier** section on the right of the page.



3. Click **Add**.

To search for existing suppliers, use the autocomplete search box on the left.

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Create new product groups and subgroups

You can create a hierarchy of groups and subgroups of products in the products page.

To access the products page, select **Products** in the **Products** menu. The top level of the products hierarchy appears on the left and the Create Groups section appears on the right.

To create new top level product groups:

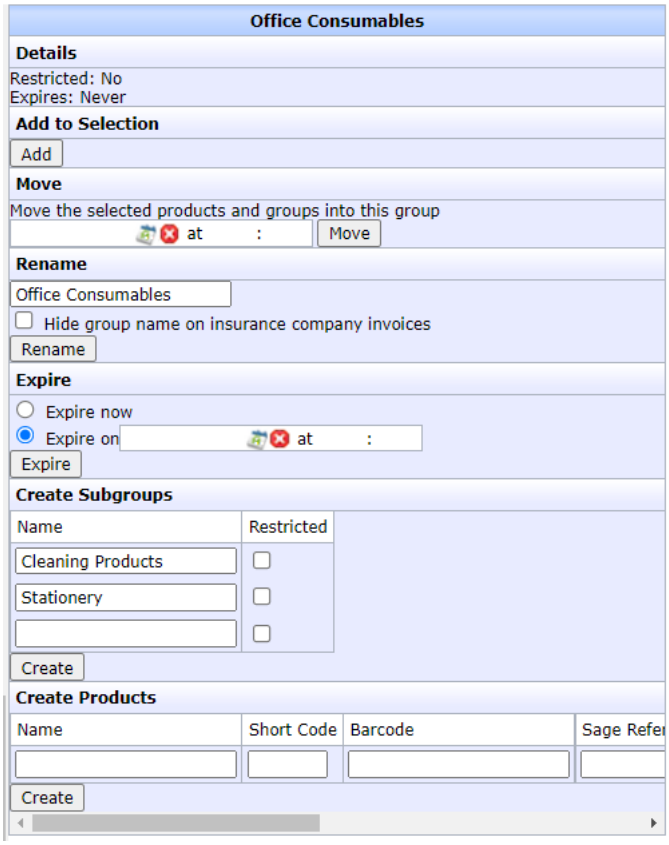
1. Enter the name of the groups in the **Create Groups** section.



2. Click **Create**.

To create new subgroup folders:

1. Click **+** next to **Products** to expand the folder.
2. Select the group that you want to create a subgroup for.
3. Enter the name of the subgroups in the **Create Subgroups** section.



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4. Click **Create**.

You can create subgroups within subgroups by selecting the subgroup, entering the name of the subgroups you want within it, and clicking **Create**.

You can rename a group or subgroup by selecting it, entering the new name in the **Rename** section, and then clicking **Rename**.

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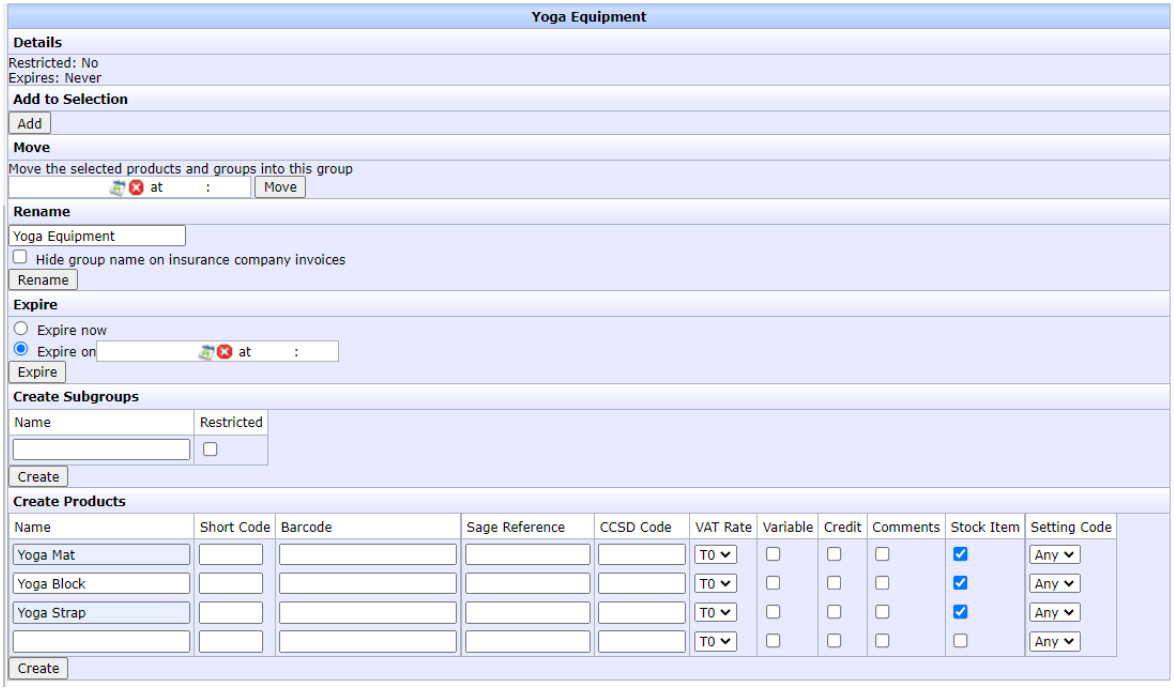
Add stock items

Initially, you must add stock items as products. Then you must add the products to at least one contract and assigned a price. Once you have done this, stock items can be charged to patients who are assigned to those contracts.

Add stock items as products

You must add stock items as non-appointment products in Conductor. To do this:

1. Select **Products** in the **Products** menu.
2. Click **+** to expand the **Products** folder, and then click **+** by the folder that holds stock items, and then select the folder where you want to add the stock item, for example, **Drugs** or **Non-Appointment Products**.
3. In the **Create Products** section, enter the product's details, one at a time, using the fields in the table below.



4. Select **Stock Item** if you want to use stock control for the product.
5. When you have added all the products, click **Create**.

Stock item fields

Complete the stock item's details using the following table. Fields with an asterisk are mandatory.

Field Name	Notes
Name *	Name of product.

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Field Name	Notes
Short Code	Fill in if using Healthcode.
Barcode	Ensure that a product barcode number is entered if a barcode scanner will be used when adding charges to patients' accounts.
Sage Reference	To link to Sage accounting software.
CCSD Code	Codes for procedures and diagnostic tests.
VAT Rate	Select the VAT rate. Select **T1** or **T9** adds VAT to the price of the product.
Variable	The price can be entered at the point of sale.
Credit	Select if the product can be raised as a credit, for example, if you want to be able to return and offer a refund for the product. This is a useful way for an accounts team to keep track of credits raised.
Comments	Select to create a comments field which administrators can complete when creating a charge. This comment then shows on the invoice.
Stock Item	Select to indicate that the product is a stock item.

Add a new product to existing contracts

Before you can use products, which include appointments and classes, you must apply a price to them and make them available on contracts.

To add a product to existing contracts:

1. Select **Wizards** in the **Products** menu.
2. Select **Add Product Wizard** in the **Wizards** menu.
3. Follow the four steps of the add product wizard.

Step 1 - select product

Start entering the product name. This works on an auto-complete system; enter part of the product to display matching products. Select the one that you want to add to one or more contracts.



Enter an effective date, or leave blank if the product should become effective immediately. You can add a product with retrospective effective dates.

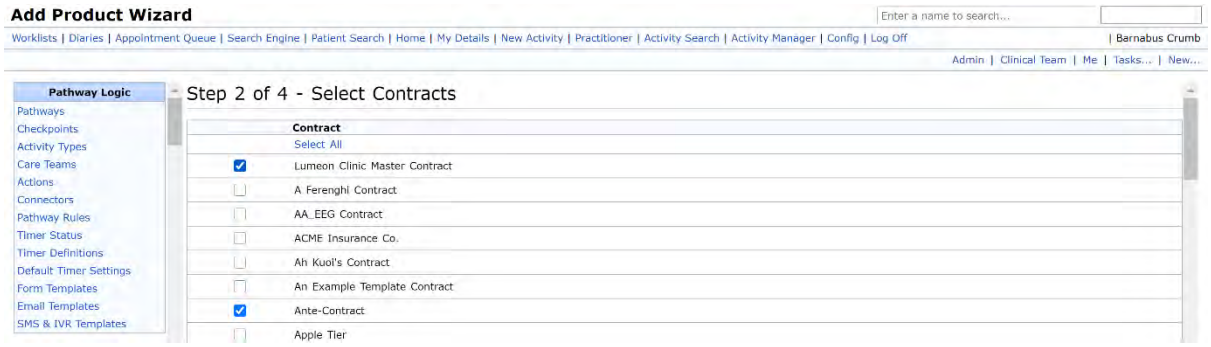
Conductor does not allow users to make bookings for products before the effective dates or after the product expiry date (if set). If no expiry date is set, the product is available indefinitely. Transaction dates can be before the effective date.

Click **Next**.

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Step 2 - select contracts

Select the contract(s) and/or template contract(s) that you want the product to be added to.

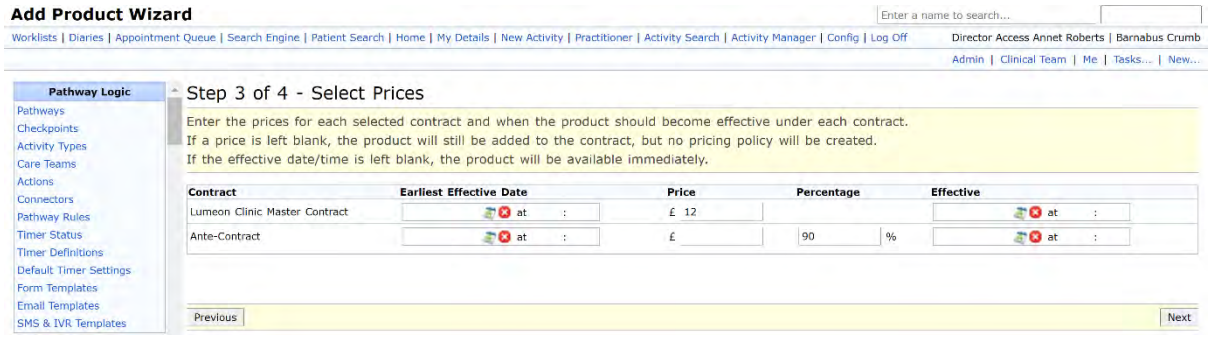


Click **Next**.

Step 3 - select prices

Enter the price for each selected contract and when the product should become effective under each contract. If a price is left blank, the product is still added to the contract, but no pricing policy is created.

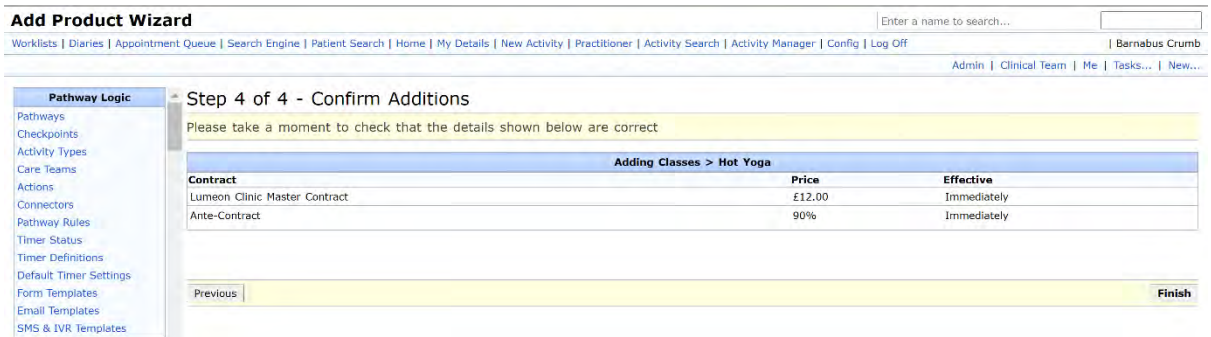
If the effective date/time is left blank, the product is available immediately.



Click **Next**.

Step 4 - confirm additions

Confirm that the product is being added to the correct contracts, and that the contract prices and the effective dates are correct.



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Click **Finish** to complete adding the product to the contracts.

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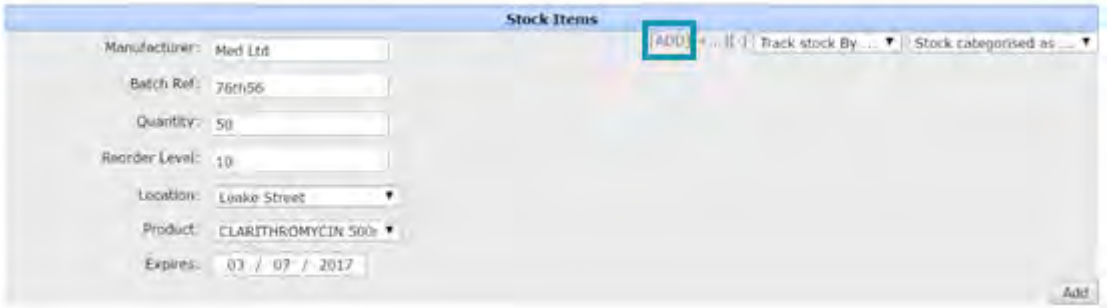
Add stock to stock control

To add stock records:

1. Select **Stock** in the **Products** menu. This displays a list of all stock items, and their quantities in square brackets.

   You can use the **Track stock by** drop-down list to view the stock list by **Product** or by **Location**. You can filter the list into different categories by selecting an option in the **Stock categorised as** drop-down list, such as **Drugs** or **Medical Equipment**.

2. Click **[ADD]** to display a form to add a new stock item.



3. Enter the stock item's details using the fields in the table below. You cannot add a stock item that has the same manufacturer and batch reference as a current stock item.

4. Click **Add**.

Once you have added a stock item, you cannot edit it. If you have made a mistake, you can remove the stock by clicking **remove** in the **Action** column, and then you can add it again.

If you need to add a stock item back into stock, for example, because it has been returned, you must add it using this process. Creating a **Credit** in the **Charges** page of a patient does not adjust the quantity. When adding a stock item back into stock, a new one must be created because you cannot add it back into an existing batch reference. This means this stock item has its own row in the table.

Stock fields

Complete the stock item's details using the following table. Fields with an asterisk are mandatory.

Field name	Description
Manufacturer	Maker of the product.
Batch Ref *	Enter the batch reference. It is a free text field and you can decide the structure. You cannot add a stock item that has the same manufacturer and batch reference as a current stock item.
Quantity *	Number of stock items. This decreases in number as stock items are sold.
Reorder Level *	Quantity at which Conductor informs you that you must order more stock. If the stock number is below the reorder level, it is highlighted red in the **Stock** page.
Location *	Select the location where the stock is to be added.
Product *	Select the product that stock is to be added for. The product must have been set up as a stock item when it was created.
Expires	Enter the expiry date of the stock. Once a stock item has expired, it is highlighted in the **Expires** column.

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Stock tracking

The stock control feature enables tracking of stock across multiple locations.

To use the stock control feature, select **Stock** in the **Products** menu. A list of stock displays on the left.

The **Track stock by** drop-down list enables you to view the stock list by **Product** or by **Location**. The **Locations** option is available if locations were set up against products when setting up the stock control page.

The **Stock categorised as** drop-down list enables you to view the stock list by product group.

You can click **+** to expand folders in the stock list. Click **-** to minimise folders.

You can view stock information for each stock item. You can change the quantity of a stock item by clicking and editing the **Quantity** number.



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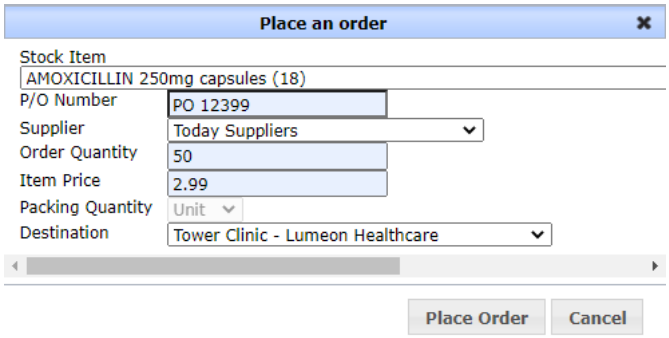
Order stock

You can record an order for a single stock item or a purchase order for many stock items.

Single stock item

To record an order for a single stock item:

1. Select **Stock Orders** in the **Products** menu.
2. Click **Quick Order**. This displays the **Place an order** form for a single item.



3. Enter the stock item's details using the fields in the table below.
4. Click **Place Order**.

Single stock item order fields

Complete the stock item's details using the following table.

Field name	Description
Stock Item	Select the stock item from the drop-down list. If the product does not appear here, check that it has been designated as stock in the product screen.
P/O Number	Enter the purchase order number. This is a mandatory field.
Supplier	Enter the supplier. You can create suppliers using **Stock Suppliers** in the **Products** menu.
Order Quantity	Enter the number of stock items ordered.
Item Price	Enter the price of each item.
Destination	Select a location from the drop-down list.

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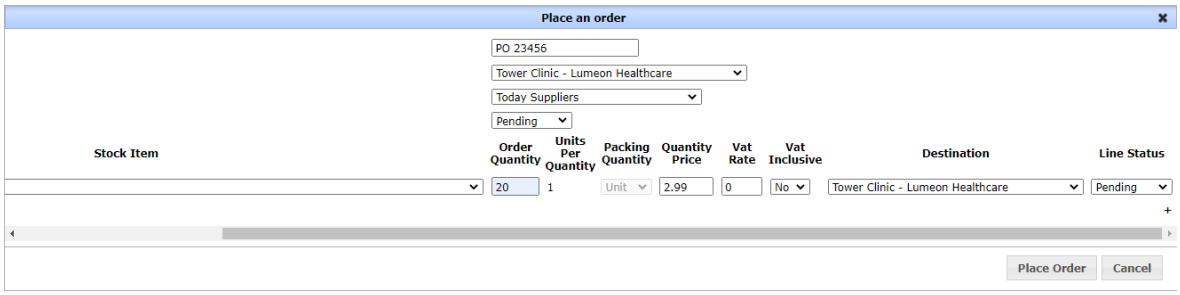
Multiple drugs

To record a purchase order for multiple stock items:

1. Select **Stock Orders** in the **Products** menu.
2. Click **Order Multiple Items**. This displays the **Place an order** form for multiple items.



3. Enter the stock item's details using the fields in the table below.
4. Click **+** on the right hand side below the order line to display another order line.



5. Continue to enter additional stock items, as required.
6. Click **Place Order**.

Multiple stock item order fields

Complete the details for the purchase order and the stock items using the following tables.

Complete the following purchase order details:

Field name	Description
Purchase Order Number	Enter the purchase order number. This is a mandatory field.
Delivery Location	Select a location from the drop-down list.
Supplier	Enter the supplier. You can create suppliers using **Stock Suppliers** in the **Products** menu.

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Field name	Description
Order Status	Default is **Pending**. Select a status for this item from the drop-down list: · Pending · Cancelled · Back Order · Partial · Returned · Received

Complete the following individual order item details:

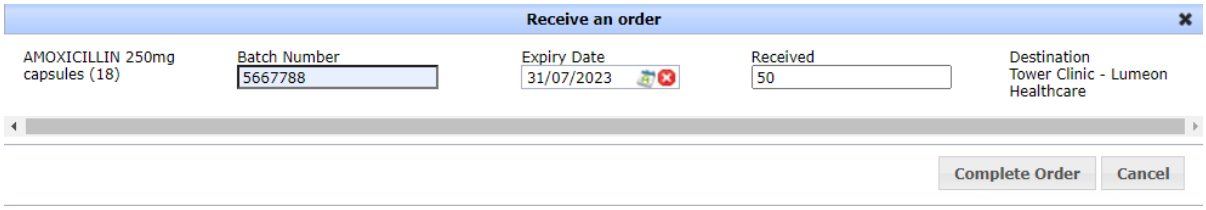
Field name	Description
Stock Item	Select the stock item from the drop-down list. If the product does not appear here, check that it has been designated as stock in the product screen.
Order Quantity	Enter the number of stock items ordered.
Quantity Price	Enter the price of each item.
VAT Rate	Enter the VAT rate.
VAT Inclusive	Select from the drop-down list whether or not VAT is included in the price.
Destination	Default is the **Delivery Location** in the order details. You can change it to a different location in the drop-down list.
Line Status	Default is **Pending**. Select a status for this item from the drop-down list: · Pending · Cancelled · Back Order · Partial · Returned · Received

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Change or receive orders

You have the following options in the list of **Current Open Orders**:

- **Amend Order** - Make the required changes to the order and click **Update Order**.
- **Receive Order** - The Receive an order form is displayed. Enter the batch number and expiry date, and update the quantity received, if necessary. Then click **Complete order**. The order disappears from the list of **Current Open Orders** and stock numbers are updated in **Stock**.



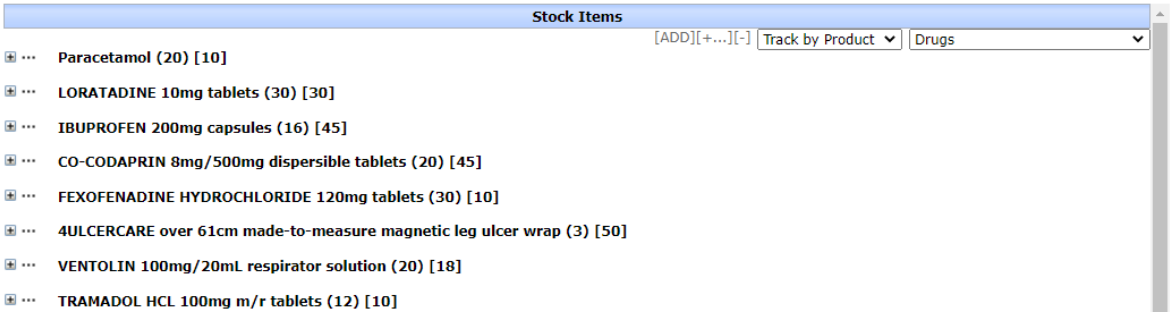
- **Cancel Order** - Cancels the order immediately, without a warning message. It disappears from the list of **Current Open Orders**.
- **Print Order** - Prints the order.

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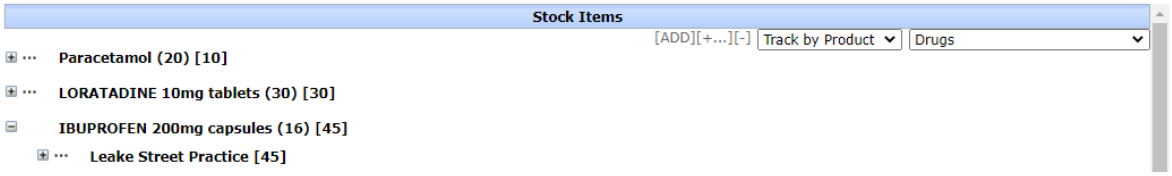
Transfer stock between locations

You can transfer stock from one location to another. To do this:

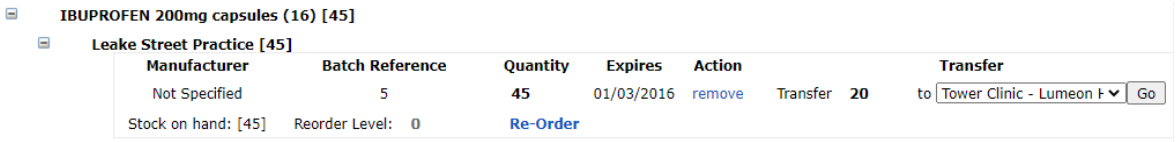
1. Select **Stock** in the **Products** menu. The **Stock Control** page is displayed.
2. You can filter the stock items by selecting a category such as **Drugs** in the **Stock categorized as** field in the top right corner of the page. The number in square brackets after the product name is the total quantity in stock across all locations.



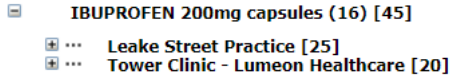
3. Click **+** next to the product that you want to transfer. This displays the locations which have stock of this product. The number in square brackets after the location is the quantity in stock at that location.



4. Click **+** next to the location that you want to transfer stock from. This displays a form which enables you to transfer stock to a different location.



5. Enter the number of items you want to transfer in the **Transfer** field, and select the location from the drop-down list that you want to transfer stock to.
6. Click **Go**. The new stock quantity at both locations is now displayed.

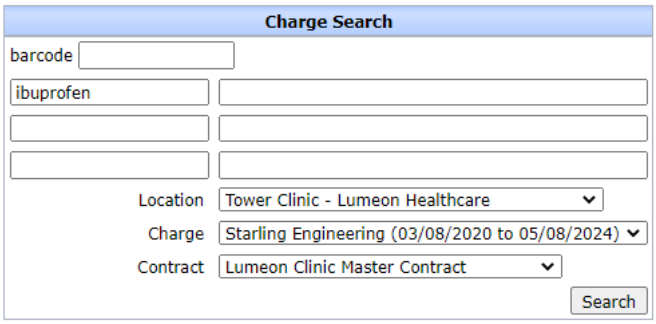


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Charge a stock item to a patient's account

To add a charge for a stock item to a patient's account:

1. Use the patient search to find the patient that you want to add a charge for.
2. Select **Charges** in the **Patient** menu.
3. Enter one of more key words in the fields in the **Charge Search** section to search for the stock item.



4. Click **Search**. The search results display how many of the stock item are available, as well as the batches available. If the stock item does not appear, it may be because there is no stock at that location or because the item is not available under the patient's contract.



5. Enter the quantity to be charged to the patient in the appropriate stock item.
6. Select **Credit** if you want to create a credit note for the patient.
7. Select the batch in the drop-down list that you want to take the item from.
8. Select **Do not adjust stock levels** if you do not want to decrease the quantity of the item in stock.
9. Click **Add charges**.

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Change the price of a product on a contract

To change the price of a product on a contract:

1. Select **Wizards** in the **Products** menu, and then **Pricing Wizard**.
2. Start typing in the name of the product and click on the appropriate product that appears in the search results below.
3. Enter an effective date or leave this field blank, and click **Next**.
4. Enter the new price or percentage price of the product with an effective date and time. Click **Next**.
5. Confirm the new prices and click **Finish**.

Drug products

You can add drug products and treat them as stock items, if required.

See the ***Drug Products in Lumeon Conductor*** for information on managing drug products.

See the ***Prescriptions in Lumeon Conductor*** for information on prescribing drug products.

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