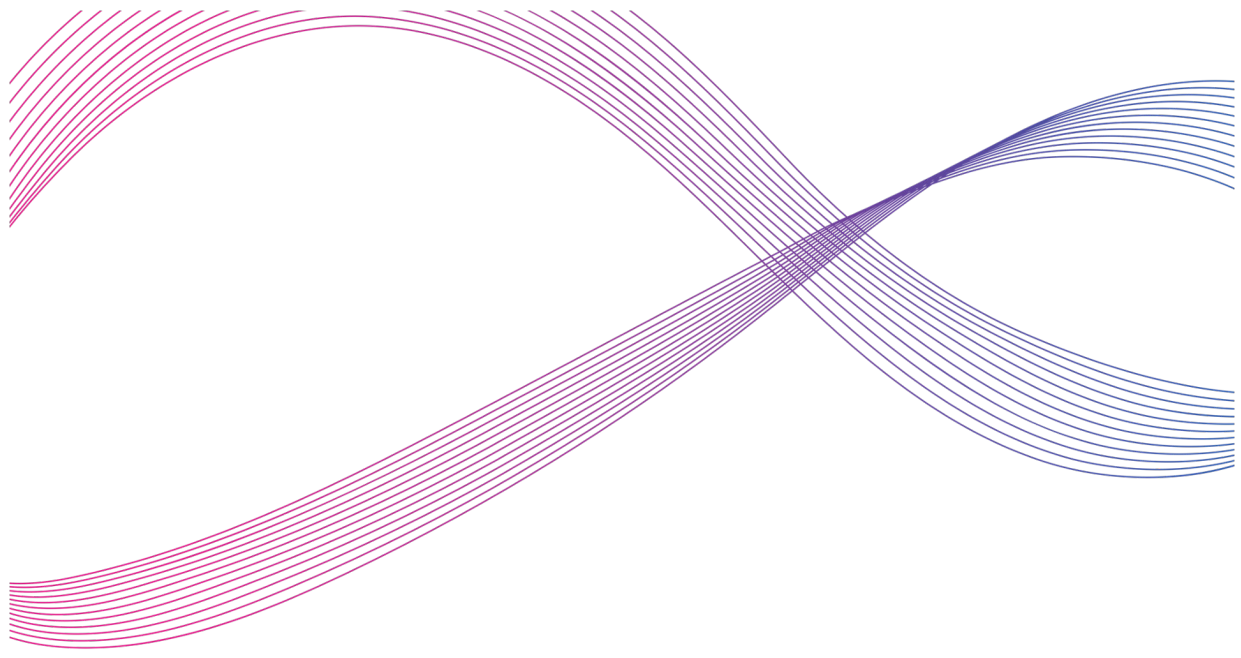




Campaign Builder in Lumeon Conductor 24.2

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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 \(page 23\)](#).

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

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.

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.

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 \(page 17\)](#).

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.

Create campaign [Close]

* Name: Road Closure 08/09/2024

Description: Road Closure on Main Street on 08/09/2024

* Charge Identifier: Ambulatory

☒ De-duplicate recipients by phone number

* Recipients: ☒ * Choose a new file. ☐ * Select a previously uploaded file.

File: Choose file No file chosen Upload

File details: Merges

Waiting for Recipient File

Cancel Create campaign (no recipients)

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 center. 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.

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.

☒ De-duplicate recipients by phone number

* Recipients ☒ * Choose a new file.
☐ * Select a previously uploaded file.

File Patient Appo...23-08-31.csv

File details You have chosen a file with these merges. Click upload to continue

Merges

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.

☒ De-duplicate recipients by phone number

* Recipients ☐ * Choose a new file.
☒ * Select a previously uploaded file.

File details

Merges

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.

☐ De-duplicate recipients by phone number

* Recipients ☐ * Choose a new file.
☒ * Select a previously uploaded file.

File details 99 of 99 rows imported. 83 SMS, 16 IVR, 3 languages, 0 invalid.
 You have chosen a file with these merges. Click upload to continue

Merges

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.

☐ De-duplicate recipients by phone number

* Recipients ☐ * Choose a new file.
☒ * Select a previously uploaded file.

CBTest07282023.csv (2023-07-28 08:06:14)

File details 5 of 5 rows imported. 4 SMS, 1 IVR, 2 languages, 1 invalid.
[Click here to generate a downloadable file](#)

Merges

First Last Date Time

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 center. 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.

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 \(page 16\)](#).

- 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.

Create campaign ✕

Merges First Last Date Time Dept

Message name New ▼

Method SMS IVR

* Originating Number (833) 439-1193 ✕ ▼

Message contents en_US es_ES fr_FR

Dear {{ First }} {{ Last }}

You have an appointment on {{ Date }} at {{ Time }} in the {{ Dept }} department.

Main Street is closed on the date of this appointment so please allow extra time to get to your appointment. Press 1 to confirm you will attend the appointment or press 3 to reschedule it.

Response	Meaning
1 ▼	Confirm Thank you for confirming that you will attend your appointment.
3 ▼	Reschedule Thank you, we will contact you to reschedule your appointment.

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

- 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.

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.

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.

Create campaign ✕

Merges First Last Date Time Dept

Message name New

Method SMS **IVR**

* Caller Identifier Lumeon Healthcare ✕

Message contents

en_US es_ES

Dear {{ First }} {{ Last }}

You have an appointment on {{ Date }} at {{ Time }} in the {{ Dept }} department.

Main Street is closed on the date of this appointment so please allow extra time to get to your appointment. Press 1 to confirm you will attend the appointment or press 3 to reschedule it.

1 Confirm ✕

Follow-up

Thank you for confirming that you will attend your appointment.

3 Reschedule ✕

Follow-up

Thank you, we will contact you to reschedule your appointment.

9 Opt out ✕

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.

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.

Voicemail ☒

You have an appointment on {{ Date }} at {{ Time }} in the {{ Dept }} department at Lumeon Healthcare.

Main Street is closed on the date of this appointment so please allow extra time to get to your appointment.

Please contact us if you would like to reschedule your appointment.

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

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 .

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.

- **[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**.

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.

The screenshot shows the Campaign Builder interface. At the top, there is a 'Name' input field with the letter 'o' and a 'Create campaign' button. Below this is a table with columns: Name, Send status, Methods, Schedule, and Report. The table contains three entries: 'Road Closure 08/09/2024' (Not scheduled, IVR SMS, Schedule link), 'Smoke Test 24.1.8' (Errors in sending, IVR SMS, Sending, Reports link), and 'Smoke Test 24.1.8B' (Sent, IVR SMS, Sent, Reports link). Below the table, it says 'Showing 1 to 3 of 3 entries (filtered from 11 total entries)' and has pagination buttons: First, Previous, 1 (selected), Next, Last. A search bar is also present at the top right of the table area.

Name	Send status	Methods	Schedule	Report
Road Closure 08/09/2024	Not scheduled	IVR SMS	Schedule	
Smoke Test 24.1.8	Errors in sending	IVR SMS	Sending	Reports
Smoke Test 24.1.8B	Sent	IVR SMS	Sent	Reports

Showing 1 to 3 of 3 entries (filtered from 11 total entries)

First Previous 1 Next Last

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.

The screenshot shows the 'Update campaign schedule' window. It has a close button (X) in the top right corner. The window displays the following information: Campaign name: Road Closure 08/09/2024; Description: Road closure on Main Street on 08/09/2024. Under '* Send campaign', there are two options: '* ASAP' (unselected) and '* Choose date/time' (selected). Below this, there are two rows for scheduling: 'Send start' with date '06/18/2024' and time '10:00', and 'Send finish' with date '06/19/2024' and time '11:00'. At the bottom right, there are 'Cancel' and 'Submit' buttons.

Update campaign schedule X

Campaign name Road Closure 08/09/2024

Description Road closure on Main Street on 08/09/2024

* Send campaign ☐ * ASAP ☒ * Choose date/time

Send start 06/18/2024 at 10:00

Send finish 06/19/2024 at 11:00

Cancel Submit

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.

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**.

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.

Campaign Reports

Campaign name	Road Closure 08/10/2023					
Description	Main Street road closure 08/10/2023					
Total Messages	Valid	Queued	Sent	Responded	Errors	
3	3	2	1(33%)	1	0	

[Create new report](#)

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.

Campaign Reports

Campaign name

Parting Lot Under Construction, July 17, 2023

Description

Total Messages

Valid

Queued

Sent

Responded

Errors

3

3

0

3

2

0

Create new report

Date Created	Status	Send Methods	First Message Sent At	Last Message Sent At	First Response At	Last Response Sent At	Action
7/17/2023, 2:11 PM	Ready	SMS: valid 3, sent 3, responded: 2	7/17/2023, 1:52 PM	7/17/2023, 1:52 PM	7/17/2023, 1:52 PM	7/17/2023, 1:52 PM	Download
7/17/2023, 1:59 PM	Ready	SMS: valid 3, sent 3, responded: 2	7/17/2023, 1:52 PM	7/17/2023, 1:52 PM	7/17/2023, 1:52 PM	7/17/2023, 1:52 PM	Download
7/17/2023, 1:54 PM	Ready	SMS: valid 3, sent 3, responded: 2	7/17/2023, 1:52 PM	7/17/2023, 1:52 PM	7/17/2023, 1:52 PM	7/17/2023, 1:52 PM	Download

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.

Other campaign builder functions

Charge identifiers

Conductor uses charge identifiers to attribute messages in a campaign to the appropriate cost center. 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.

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

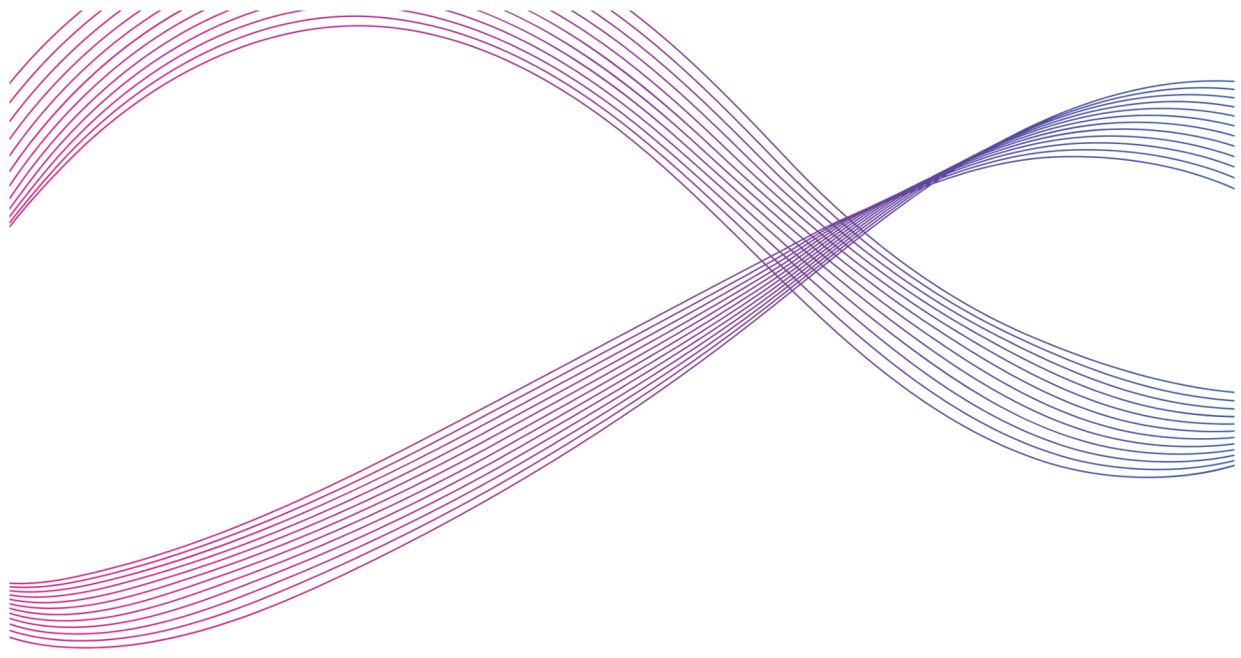
A message generated by the campaign builder goes through several touchpoints before it reaches the recipient. This is the typical path of a message:

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

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.



Security in Lumeon Conductor 24.2

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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 \(page 7\)](#).

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**.

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 cellphone number or to your email address depending on the 2FA configuration. Enter the authentication token contained in the SMS or email:



The screenshot shows a web form titled "Authentication Code". It has a label "Authentication Token" next to a text input field. Below the input field, the text reads: "Please enter the authentication code sent to you on *****n*@qi*****". Below this, it says "This code is case sensitive." and "If you have not recieved this code you can re-send it by [clicking here](#)." At the bottom right of the form is a button labeled "Authenticate me".

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.

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

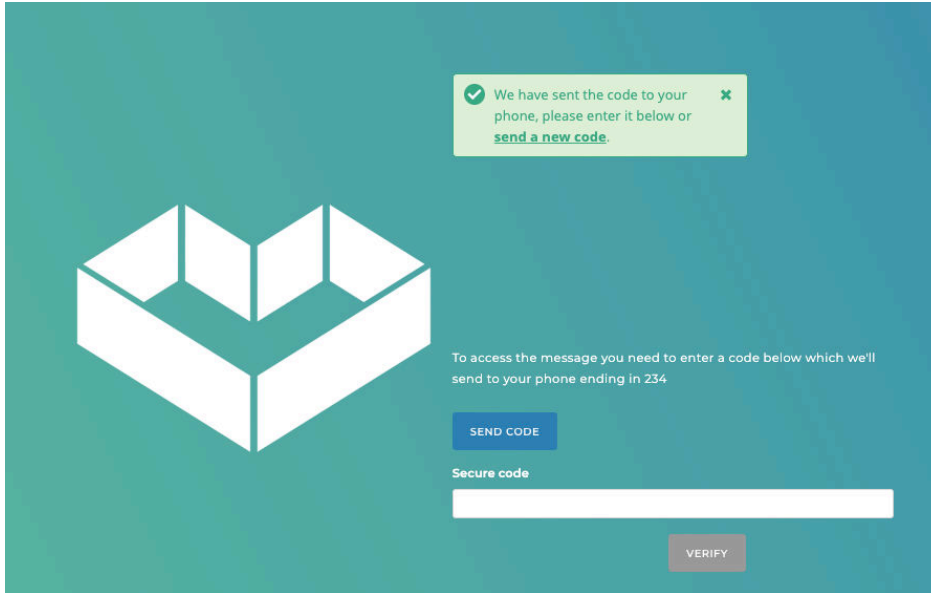
Send a secure email

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.

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

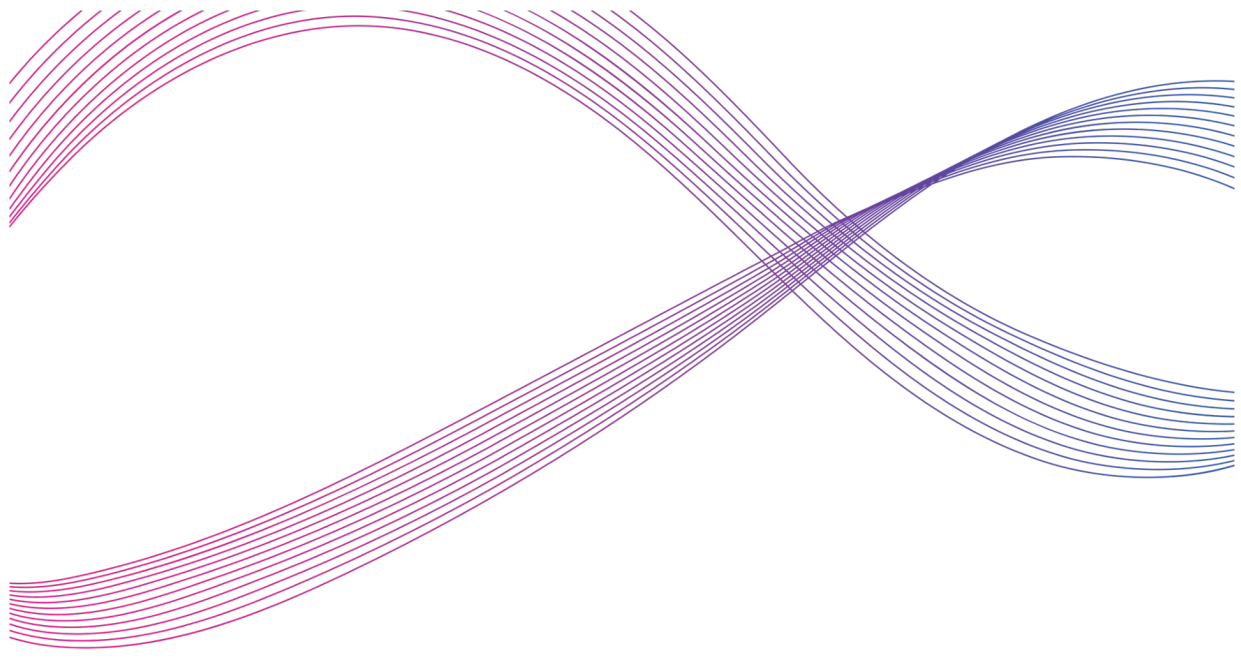
System administrators can view the audit log for secure emails. This menu option is controlled by a security point. If you cannot see it and want to access to it, contact your system administrator or Lumeon Support.

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.

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.



SMS & IVR Messages in Lumeon Conductor 24.2

Issued by: Lumeon Learning
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Introduction

Lumeon Conductor can send interactive SMS (ISMS) messages and interactive voice response (IVR) calls 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.

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 and IVR functionality

Conductor can send ISMS and IVR 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 an SMS message to remind a patient about an appointment or to provide a secure link so that they can fill in a form.

An ISMS or IVR message can be configured so that the recipient can interact with your organization. For example, if you send out an appointment reminder as an ISMS or IVR message, the message can say "Press 1 to confirm or press 3 to cancel". The pathway processes the reply and acts accordingly. For example, if the patient cancels the appointment, Conductor can send another message providing options for the patient to book a different appointment time.

Conductor uses SMS and IVR 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 enter the SMS and IVR templates in different languages. Conductor uses patients' language preferences to send the SMS or IVR message in the appropriate language.

When you create an IVR template, Conductor uses **Vonage** text-to-speech or Google text-to-speech technology to convert the text in the templates to speech. This speech forms the IVR message. See [Vonage text-to-speech](#), [Google text-to-speech](#) and [Google text-to-speech languages](#) for more information.

Purpose

The purpose of this document is to:

1. Describe how to view ISMS and IVR templates in Lumeon Conductor. See [View SMS and IVR templates \(page 5\)](#).
2. Explain how to use the SMS and IVR template functionality to set up interactive SMS (ISMS) templates. See [ISMS templates \(page 8\)](#).
3. Explain how to use the SMS and IVR template functionality to create, edit, and review IVR templates. See [IVR templates \(page 13\)](#).
4. Describe other features of SMS and IVR templates, such as emojis and include tags, and the languages that Conductor uses. See [Other SMS and IVR template features \(page 20\)](#).

5. Review best practice, message restriction regulations, telephone number options, and requirements, for using voice and SMS in Conductor. See [Voice and SMS requirements for US customers \(page 24\)](#).
6. View the security point settings that affect SMS and IVR functionality. See [Security points \(page 30\)](#).

View SMS and IVR templates

To view SMS and IVR templates, select **SMS & IVR Templates** in the **Communication** or **Pathway Logic** menu. This displays a list of existing ISMS and IVR templates.

Name
Type
Languages

Select

☒ contains
☐ does not contain
Select

New: ISMS
CREATE NEW

Name	Type		
Address Check Standard SMS Template	Standard SMS	CANCEL	Clone
Book Appointment	IVR	CANCEL	Clone
Book Appointment IVR Template	IVR	CANCEL	Clone
Debt Chasing - Insurance	Standard SMS	CANCEL	Clone
Debt Chasing - Private	Standard SMS	CANCEL	Clone
Generic Campaign	ISMS	CANCEL	Clone
Long standard SMS template	Standard SMS	CANCEL	Clone
Rebook Appointment ISMS Template	ISMS	CANCEL	Clone
Task Notification	Standard SMS	CANCEL	Clone

Showing 1 to 9 of 9 entries

First
Previous
1
Next
Last

Each template displays a **Type** of:

- **ISMS** – Template for an interactive SMS messages where a message is sent and the recipient can reply.
- **IVR** – Template for an interactive voice response message where Conductor converts the message from text to speech which is sent as a voice call to the recipient. The recipient can reply using the keys on their phone.

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.

The screenshot shows the search interface with the following elements:

- Name:** A text input field containing 'ap'.
- Type:** A dropdown menu set to 'Select'.
- Languages:** A dropdown menu with 'contains' selected. A sub-menu is open showing options: 'contains' (selected), 'does not contain', and 'does not contain'.
- New:** A dropdown menu set to 'ISMS'.
- CREATE NEW:** A button.
- Results Table:**

Name	Type	
Book Appointment	IVR	CANCEL Clone
Rebook Appointment ISMS Template	ISMS	CANCEL Clone
- Footer:** 'Showing 1 to 2 of 2 entries (filtered from 8 total entries)' and pagination buttons: First, Previous, 1, Next, Last.

- **Type** - Select **ISMS** or **IVR** from the drop-down list to display only templates of that type.

The screenshot shows the search interface with the following elements:

- Name:** An empty text input field.
- Type:** A dropdown menu set to 'ISMS'.
- Languages:** A dropdown menu with 'contains' selected. A sub-menu is open showing options: 'contains' (selected), 'does not contain', and 'does not contain'.
- New:** A dropdown menu set to 'ISMS'.
- CREATE NEW:** A button.
- Results Table:**

Name	Type	
Generic Campaign	ISMS	CANCEL Clone
Rebook Appointment ISMS Template	ISMS	CANCEL Clone
- Footer:** 'Showing 1 to 2 of 2 entries (filtered from 8 total entries)' and pagination buttons: First, Previous, 1, Next, Last.

- **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.

The screenshot shows the search interface with the following elements:

- Name:** An empty text input field.
- Type:** A dropdown menu set to 'Select'.
- Languages:** A dropdown menu with 'does not contain' selected. A sub-menu is open showing options: 'contains', 'does not contain' (selected), and 'does not contain'. A language dropdown is also visible, set to 'es_ES'.
- New:** A dropdown menu set to 'ISMS'.
- CREATE NEW:** A button.
- Results Table:**

Name	Type	
Book Appointment IVR Template	IVR	CANCEL Clone
Generic Campaign	ISMS	CANCEL Clone
Rebook Appointment ISMS Template	ISMS	CANCEL Clone
- Footer:** 'Showing 1 to 3 of 3 entries (filtered from 9 total entries)' and pagination buttons: First, Previous, 1, Next, Last.

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.

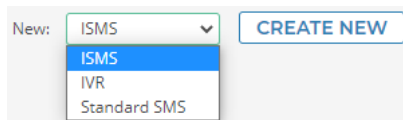
ISMS templates

Conductor can be configured to automatically send interactive SMS messages to patients, such as appointment confirmations or reminders.

Create a new ISMS template

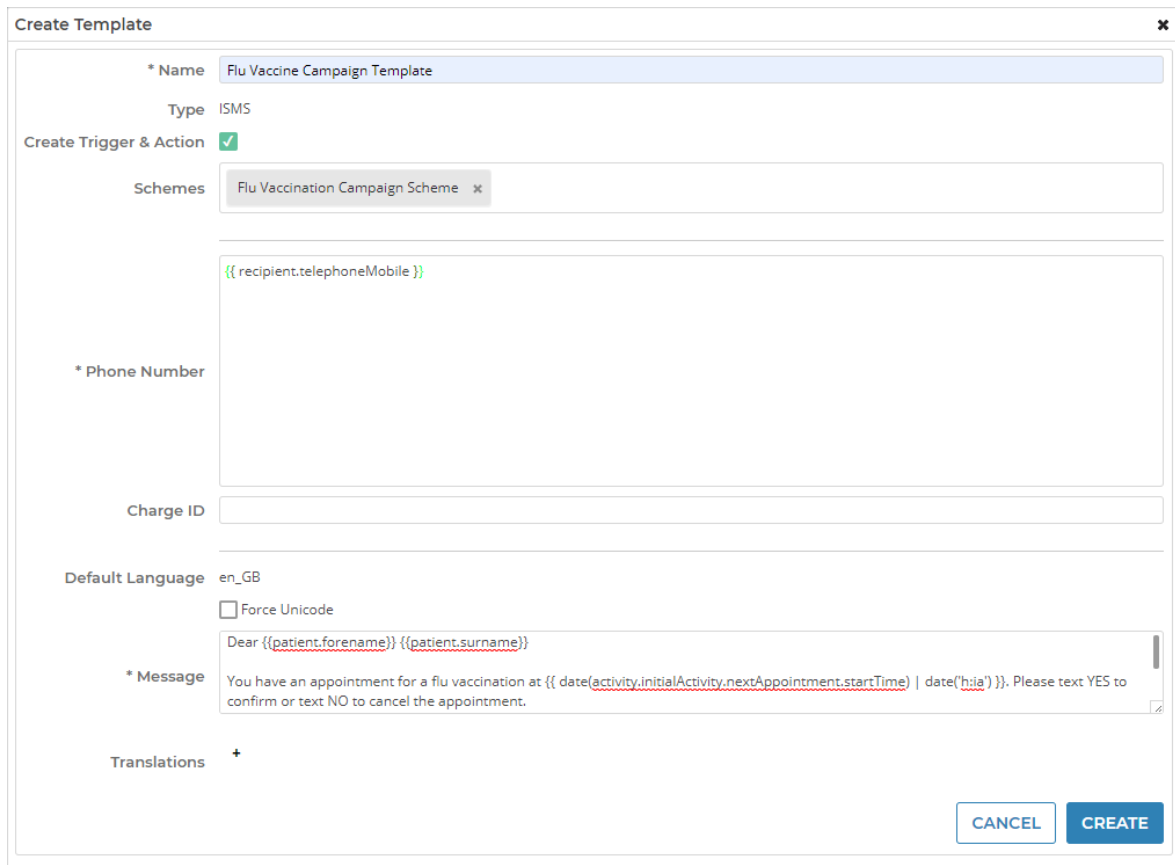
To create a new ISMS template:

1. Select **ISMS** in the drop-down list in the **New** field.



A screenshot of the 'New' dropdown menu in the Lumeon Conductor interface. The dropdown is open, showing four options: 'ISMS' (highlighted in blue), 'IVR', and 'Standard SMS'. To the right of the dropdown is a 'CREATE NEW' button.

2. Click **Create New** to display the **Create Template** page in a new window.



A screenshot of the 'Create Template' page in the Lumeon Conductor interface. The page is titled 'Create Template' and contains the following fields and sections:

- * Name:** Flu Vaccine Campaign Template
- Type:** ISMS
- Create Trigger & Action:** ☒
- Schemes:** Flu Vaccination Campaign Scheme
- * Phone Number:** {{ recipient.telephoneMobile }}
- Charge ID:** (empty field)
- Default Language:** en_GB
- Force Unicode:** ☐
- * Message:** Dear {{patient.forename}} {{patient.surname}}
You have an appointment for a flu vaccination at {{ date(activity.initialActivity.nextAppointment.startTime) | date('h:ia') }}. Please text YES to confirm or text NO to cancel the appointment.
- Translations:** +

At the bottom right, there are two buttons: 'CANCEL' and 'CREATE'.

3. Complete the fields using the table below to create a new ISMS template - see [ISMS template fields \(page 9\)](#).
4. If multiple languages are configured for your organization, you can add new translations - see [Create ISMS translations \(page 10\)](#).
5. When you have finished, click **Create**. The new ISMS template displays in the list of templates.

After you have created the ISMS template, you can preview it - see [Preview an ISMS template \(page 12\)](#).

Edit an ISMS template

To edit an ISMS 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 - see [ISMS template fields \(page 9\)](#).
3. If multiple languages are configured for your organization, you can add new translations or edit existing ones - see [Create ISMS translations \(page 10\)](#).
4. You can preview the template - see [Preview an ISMS template \(page 12\)](#).
5. When you have finished, click **Update**.

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 (page 25) 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 center 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 (page 20) and Include tags (page 21) 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 (page 10) .

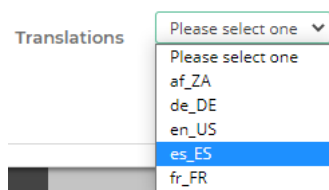
Create ISMS translations

If multi-language configuration is enabled, you can create language translations for each ISMS 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 an ISMS template:

1. In the **Create Template** or **Update Template** window, click **+** beside **Translations** and select the language in the drop-down list.
2. In the **Languages** field, select the required language in the drop-down list.



3. 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 in the template.

- 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 include statements in place. Otherwise, enter the text, Twig tags, and include statements, in the **Template** field. See [Include tags \(page 21\)](#) for more information.

Create Template

* Name: Flu Vaccine Campaign Template

Type: ISMS

Create Trigger & Action: ☒

Schemes: Flu Vaccination Campaign Scheme

* Phone Number: {{ recipient.telephoneMobile }}

Charge ID:

Default Language: en_GB

☐ Force Unicode

* Message: Dear {{patient.forename}} {{patient.surname}}. You have an appointment for a flu vaccination at {{ date(activity.initialActivity.nextAppointment.startTime) | date('h:ia') }}. Please text YES to confirm or text NO to cancel the appointment.

Translations: +

CANCEL **CREATE**

- The **Force Unicode** checkbox is automatically selected if you choose a language that Conductor defines as using non-standard characters. Select **Force Unicode** if you include non-standard characters or emojis in the translation. See [Emojis \(page 20\)](#) and [Languages in SMS and IVR templates \(page 22\)](#) for more information. You can also clear this checkbox if you are sure that the message does not contain any non-standard characters and it might go over the 70 character limit for a Unicode message. See [Unicode \(page 23\)](#) and [SMS message length \(page 28\)](#) and for more information.
- If Conductor defines the language as one that is written right to left, the **Show right to left** checkbox is automatically selected. See [Create templates for right to left languages \(page 23\)](#) for more information. You can clear this checkbox to show the message written left to right if you want to check that the Twig expressions are correct.
- When you have finished, click **Create Language**.

When you edit a template, you can see the tabs for the translations that you have created, in alphabetical order.

de_DE en_US **es_ES** fr_FR +

You can remove a translation by selecting the appropriate tab and clicking **Delete Language**.

de_DE en_US es_ES fr_FR +

Translations

☐ Force Unicode

☐ Show right to left

DELETE LANGUAGE

Preview an ISMS template

You can preview an ISMS template to see what it looks like when you send it. To do this:

1. Display the ISMS template by selecting its name in the list of templates.
2. In the **Preview** section at the end of the template, select the language for the preview. The default language displays but you can select other language translations that you have created.
3. Enter the **Activity ID**. This must be a valid activity ID for a patient in the pathway that uses this template so that Conductor can resolve the Twig expressions in the previewed message.
4. Enter the **Preview Number**. This is the number that you want to send the preview of the ISMS template to, for example, your cellphone number.
5. Click **Send ISMS**.

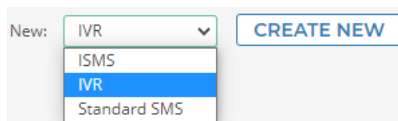
IVR templates

Conductor can be configured to automatically send interactive voice messages to patients, such as confirming an appointment or offering a patient a range of appointments to choose from.

Create a new IVR template

To create a new IVR template:

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.
3. Complete the fields using the table below to create a new IVR template - see [IVR template fields \(page 14\)](#).
4. If multiple languages are configured for your organization, you can add new translations - see [Create IVR translations \(page 18\)](#).
5. When you have finished, click **Create**. The new IVR template displays in the list of templates.

After you have created the IVR template, you can preview it - see [Preview an IVR template \(page 19\)](#).

Edit an IVR template

To edit an IVR 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 - see [IVR template fields \(page 14\)](#).
3. If multiple languages are configured for your organization, you can add new translations or edit existing ones - see [Create IVR translations \(page 18\)](#).
4. You can preview the template - see [Preview an IVR template \(page 19\)](#).
5. When you have finished, click **Update**.

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.

The screenshot shows the 'Create Template' window with the following fields and values:

- Name:** Appointment Reminder IVR Template
- Type:** IVR
- Create Trigger & Action:** ☒
- Schemes:** Default Scheme
- Phone Number:** (Empty field with a placeholder logic snippet: `{{ if recipient.telephoneDay is not empty and activity.property('Day number status') in ['Cellphone','Landline','Virtual'] }} {{(recipient.telephoneDay)}} {{else }} {{(recipient.telephoneMobile)}} {{ endif }}`)
- Caller ID:** (Empty field with a placeholder logic snippet: `{{ lookup.get('locationCLI', activity.nextAppointment.location.name), 'Error' }}`)
- Charge ID:** Outpatient
- Voicemail Detection:** Continue

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.

General template field	Description
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 center 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: 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. Hang up - Hang up and do not continue the call. 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 behavior is provided for all these cases.

IVR call state matrix fields

An example of a call state matrix is shown below.

* Voicemail Detection Continue ▾

Call State	Label	Action	Repeat	Check Length	1	2	3	4	5	6	7	8	9	0	#	*	0	?
Voicemail	A	None ▾	Yes ▾															
Initial	B	Collect Digit ▾	No ▾		C ▾		D ▾		E ▾		F ▾		G ▾		B ▾			H ▾
Confirm	C	None Delete	No ▾															
Cancel	D	Collect Digit Delete	No ▾			B ▾											H ▾	
Reschedule	E	Connect Delete	No ▾															
Help	F	Connect Delete	No ▾															
Stop	G	None Delete	No ▾															
No Response	H	None Delete	No ▾		C ▾		D ▾		E ▾		F ▾		G ▾		B ▾		H ▾	
Unrecognized	I	None Delete	No ▾		C ▾		D ▾		E ▾		F ▾		G ▾		B ▾		H ▾	

Add call state name

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.

Call state matrix field	Description
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.

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.

Call State

Voicemail

Variable Message

en_GB Hello {{ recipient.name.forename }}. We are calling from Lumeon Healthcare to remind you of your upcoming appointment at {{ activity.nextAppointment.location.name }}.

ES_ES +

Hola {{ recipient.name.forename }}. Llamamos desde Lumeon Healthcare para recordarle su próxima cita en {{ activity.nextAppointment.location.name }}.

Fixed Message

en_GB Please call 1-888-LUM to cancel or reschedule your appointment.

ES_ES +

Llama al 1-888-LUM para cancelar o reprogramar su cita.

DELETE LANGUAGE

Call State

Initial

Variable Message

en_GB Hello {{ recipient.name.forename }}. We are calling from Lumeon Healthcare to remind you of your upcoming appointment at {{ activity.nextAppointment.location.name }}.

ES_ES +

Hola {{ recipient.name.forename }}. Llamamos desde Lumeon Healthcare para recordarle su próxima cita en {{ activity.nextAppointment.location.name }}.

Fixed Message

en_GB To confirm the appointment, press 1. To cancel the appointment, press 3. To reschedule the appointment, press 5. For help, press 7. If you would no longer like to receive these calls, press 9. To repeat this message, press 0.

ES_ES +

Para confirmar esta cita, presione 1. Para cancelar la cita, presione 3. Para reprogramar, presione 5. Para obtener ayuda, presione 7. Si ya no desea recibir estas de recordatorio, presione 9. Para repetir este mensaje, presione 0.

DELETE LANGUAGE

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 (page 27) 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 (page 18) .

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 (page 21) 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 (page 18) .
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.

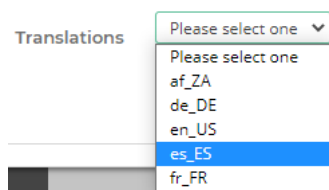
Create IVR translations

If multi-language configuration is enabled, you can create language translations for the variable and fixed messages for each call state in the IVR 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 an IVR template:

1. In the **Create Template** or **Update Template** window, click **+** below the variable or fixed message field in the appropriate call state and select the language in the drop-down list.
2. In the **Languages** field, select the required language in the drop-down list.



3. You may want to copy the text in the appropriate **Variable Message** or **Fixed Message** 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 include statements in the template.
4. If you have copied the template text in the default language, paste it into the translation field for the new language translation. Replace the plain text in the original language with the new language while keeping the Twig tags and include statements in place.

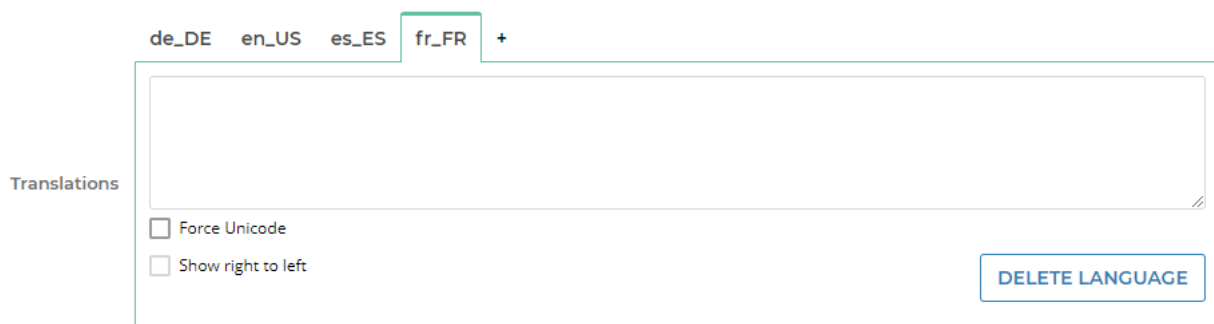
Otherwise, enter the text, Twig tags, and include statements, in the translation field. See [Include tags \(page 21\)](#) for more information.

- If Conductor defines the language as one that is written right to left, the **Show right to left** checkbox is automatically selected. See [Create templates for right to left languages \(page 23\)](#) for more information. You can clear this checkbox to show the message written left to right if you want to check that the Twig expressions are correct.
- When you have finished, click **Create Language**.

When you edit a template, you can see the tabs for the translations that you have created, in alphabetical order.



You can remove a translation by selecting the appropriate tab and clicking **Delete Language**.



Preview an IVR template

You can preview an IVR template to see what it looks like when you send it. To do this:

- Display the IVR template by selecting its name in the list of templates.
- In the **Preview** section at the end of the template, select the language for the preview. The default language displays but you can select other language translations that you have created.
- Enter the **Activity ID**. This must be a valid activity ID for a patient in the pathway that uses this template so that Conductor can resolve the Twig expressions in the previewed message.
- Enter the **Preview Number**. This is the number that you want to send the preview of the IVR template to, for example, your cellphone number.
- Click **Send IVR**.

Other SMS and IVR template features

Emojis

You can add emojis to ISMS messages. To do this:

1. Find the emoji that you want to use. See <https://unicode.org/emoji/charts/full-emoji-list.html> for a comprehensive list of emojis.
2. Copy the emoji and paste it into the message field. If using the link above, highlight and copy the emoji in the **Browser** column.

Smileys & Emotion														
face-smiling														
No	Code	Browser	Appl	Goog	FB	Wind	Twtr	Joy	Sams	GMail	SB	DCM	KDDI	CLDR Short Name
1	U+1F600													grinning face
2	U+1F603													grinning face with big eyes
3	U+1F604													grinning face with smiling eyes
4	U+1F601													beaming face with smiling eyes

3. Paste the emoji into the appropriate place in the **Message** field. You may find that the emoji displays differently depending on the browser, device, or app that you and your patients are using to read the message.

Create Template ✕

* Name

Type ISMS

Create Trigger & Action ☐

* Phone Number

Charge ID

Default Language en_GB

☒ Force Unicode

* Message

Translations +

4. Select the **Force Unicode** check box, if it is not already selected, to ensure that the emoji displays correctly in your message.

Include tags

You can use include tags in ISMS and IVR templates. These enable you to set up long Twig statements with a short name that is easy to remember. You can then reuse these short names in as many templates as you want and it makes the template easier to understand.

When Conductor creates an ISMS or IVR message for a patient, it looks up the include tags and replaces them with the appropriate text for that patient.

For example, if you have the appointment time in your ISMS and IVR messages, it may look like this:

```
{{ date(activity.initialActivity.nextAppointment.startTime) | date('h:ia') }}
```

If you set up an include tag called **appttime** for this Twig statement, then enter the following to use it in the ISMS or IVR message:

```
{% include 'appttime' %}
```

As you can see, this is much shorter and clearer when it forms part of the message than the whole Twig statement. The appointment time probably appears in all your ISMS and IVR templates for appointment confirmations and reminders but you only have to set it up once in an include tag. Also, if, for example, you want to change the time format, you change it once in the include tag and it is automatically updated in all the templates that use it.

Create an include tag

To set up an include tag:

1. Select **Includes** in the **Communication** menu.
2. Enter name of the include tag in the **Name** field.

The screenshot shows a web form titled "Include". It contains two main input areas. The first is labeled "* Name" and has a text box with the value "appttime". The second is labeled "* Source" and has a text area with the Twig code: `{{ date(activity.initialActivity.nextAppointment.startTime) | date('h:ia') }}`. A blue button labeled "CREATE" is at the bottom right.

3. Enter the Twig statements in the **Source** field.
4. Click **Create**.

Add an include tag in a message

To add an include tag, called **tagname**, in an ISMS or IVR message, enter the following in the template:

```
{% include 'tagname' %}
```

Languages in SMS and IVR 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
Haitian 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

Language	Language code
Yiddish	yi-IL
Swedish	sv-SE
Albanian	sq-AL
Armenian	hy-AM
Bengali	bn-BD
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 \(page 28\)](#) 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.

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.

Voice and SMS requirements for US customers

Conductor allows one-way and two-way messaging with patients via telephone, using voice and SMS. There is a choice of the type of telephone number that is used to send and receive messages for a given scenario. This section outlines those options and recommends the type of number to use in each case.

Outbound communication best practice

The global COVID-19 pandemic created a new opportunity for scammers to target US-based recipients through voice and text channels. In an attempt to limit the number of incoming fraud attempts related to COVID-19 and other unsolicited spam campaigns, carriers responded by strengthening their filtering methods to be more restrictive around common tactics used by scammers. Verbiage that once was acceptable to deliver to recipients could now be flagged as spam, and the filtering criteria can change as new tactics emerge.

Lumeon continues to work closely with our carriers to ensure our outbound messaging is fully compliant with the changing landscape under the guidance of the Telephone Consumer Protection Act (TCPA). Based on extensive testing, Lumeon identified three critical elements that improve message delivery:

- Use an organizational identifier as the first part of any outgoing message. This action allows the recipient to associate the message with an organization they know immediately.
- Avoid using URL shorteners such as **TinyURL** and **bit.ly** because scammers commonly use them. If used, your messages may be blocked. Lumeon has a URL shortener that works well and ensures message delivery.
- Include a STOP message for recipients to opt out at any time with immediate activation. This ensures compliance with TCPA guidelines and avoids blocked messages.

Lumeon understands the criticality of the successful delivery of your outbound messaging and is committed to working with you to incorporate these changes into your solution in a carefully controlled manner. We also will continue to monitor the situation with our carrier partners and update our guidelines should they change.

Contact Lumeon Support if you would like to discuss implementing any of these options.

Message restrictions

US Federal Communications Commission (FCC) regulations under the Telephone Consumer Protection Act (TCPA) stipulate that "a healthcare provider may initiate only one message (whether by voice call or text message) per day, up to a maximum of three voice calls or text messages combined per week from a specific healthcare provider". See for example <https://www.thehealthlawpulse.com>.

To ensure that a patient receives one voice call or text message per day, Conductor can combine reminders for multiple appointments into a consolidated voice call or text message providing details of the date and time of the first appointment. For example:

You have 3 appointments on Thursday March 3rd, the first of which is at 9:30 am.

However, if your organization uses Conductor to produce marketing or promotional campaigns, it is important that this limit is not exceeded. Lumeon can configure message restrictions, also known as message throttling, to ensure that the regulations are met.

These restrictions do not apply when:

- Text messages are sent in response to a text message sent by a patient. For example, if a patient confirms an appointment, the pathway may issue a response such as:

Thank you for confirming. Please arrive 20 mins before your appt and bring any ID and insurance cards.

- A patient has agreed to receive regular text messages. For example, during an appointment with a provider, a patient agrees to receive daily messages to monitor a long-term health condition such as diabetes.

Phone number types

There are four distinct types of telephone numbers in the USA:

- Regular long number
- Toll-free long number
- Regular short code
- Free-to-end-user short code

Short codes can only be used for SMS. Long numbers can only be used for voice.

Regular long numbers

Lumeon can use customer-owned regular long numbers, that is your landline numbers, for voice messaging. It can do this on a per-facility/location basis. The scenarios that would benefit from this would be those where the number is already known to the patient or the number is linked to a switchboard, call center, or help desk function that can deal with calls transferred from Conductor or directly placed by the patient. Lumeon requires proof of ownership of customer supplied numbers, such as a recent invoice and a letter of authorization, to legitimize our use of them. The number displayed on the patient's phone may be recognized by them or replaced with an entry in their phone's contacts list, increasing the chances that they will answer the call.

Alternatively, if the number is only to be used for outgoing voice messages, Lumeon can provide a regular long number with a local area code for a small charge.

Regular long numbers cannot be used for SMS messages.

Toll-free long numbers

Toll-free long numbers (TFNs) can be used for both SMS and voice messaging but should be restricted to non-marketing type activities. If the same patient is likely to receive both SMS and voice messages, then a TFN is the best option, as the same number can be used for both. TFNs have the same high throughput of messages and no daily send limit as short codes and are therefore equally suitable for high volume alerts and notifications. Calls to and from these numbers are toll-free if called or received on a landline phone. Cellular operators may charge or use up airtime minutes for calls to toll-free numbers. There is always a cost to receive SMS messages from or send SMS messages to a TFN.

Regular short codes

Lumeon has a vanity short code, 89888, which can be used by each of its clients for certain types of SMS messages. It is ideal for high volume one-way messaging such as alerts and notifications. Two-way messaging via a short code is problematic. If a reply is expected, then it must be possible to make it unique to that use case otherwise it could be confused with another expected response from the same patient or phone number. Additional short codes could be used to solve this problem but the lead-time to obtain a short code is restrictive (around 12 weeks), they are much more expensive to obtain than TFNs, and their supply is limited (since, by definition, they only contain five or six digits).

FTEU short codes

Lumeon has a free-to-end-user (FTEU) short code, 85173. FTEU short codes have the same abilities and restrictions as regular short codes but patients pay no charges for receiving texts from or sending texts to such a number. The charges are, in effect, paid by the client instead.

Which type of number to use?

When to use regular long numbers

If the patient will only receive voice messages and/or the patient will call the number to speak to someone representing the client's organization, then Lumeon recommends using the client's existing landline number. Alternatively, for voice-only messaging with no expectation that the number can be called, Lumeon can provide a regular long number, in most cases with an area code at the customer's location.

When to use short codes

For any one-way SMS messaging or simple short-term two-way communication, you can use the Lumeon regular short code. If the target audience is likely to not be able to receive messages due to their cost, then the client can choose the higher cost Lumeon FTEU short code. Lumeon does not recommend the purchase and use of additional short codes, due to their cost, long lead time, and limited availability.

When to use toll-free long numbers

Lumeon recommends that you have a separate toll-free long number (TFN) for each of your pathways. This provides:

- The ability to deploy the solution quickly.
- SMS and voice messaging using the same number which the patient therefore associates with that service.
- Ease of association of an SMS message from a patient to the originating outgoing message without needing to use complex response options.

A TFN can be used by more than one pathway if the messages related to the pathways do not overlap in time. Such optimizations are part of Lumeon's pathway design process.

Voice and SMS requirements for appointment reminders

Phone number options

Conductor can use toll-free numbers (TFNs) from one of the US toll-free area codes: 800, 833, 844, 855, 866, 877 and 888. Calls to and from these numbers are toll-free if called or received on a landline phone. Cellular operators may charge or use up airtime minutes for calls to toll-free numbers. The exact charge depends on the cellular network operator.

An alternative to using toll-free numbers for voice calls is to use a customer owned landline number. Conductor can also accommodate customer owned numbers per location or specialty. Should the patient choose to call back the number, the call is routed directly to that number. Typically, this is a call center or the reception desk at the appointment location.

Customer supplied numbers must be regular landline numbers, they cannot be toll-free numbers. If your call center uses a toll-free number, there will also be a regular landline number that the toll-free number maps to so that Conductor can still use a customer supplied number. In this case, Lumeon requires proof of ownership of customer supplied numbers. Proof of ownership is required to comply with regulations to prevent spoofing of numbers. Lumeon can pass this number onto our service provider.

For text messages, you can use Lumeon's SMS regular short code 89888. You can opt to use your own short code which can be rented through Lumeon. You can also rent Free To End User (FTEU) short codes. There are additional monthly charges for customer specific short codes and a lead time of about two months as carriers must approve the new short code. The choice of which short code to use can be decided on a campaign or even on a per message basis. There are additional costs associated with sending and receiving FTEU SMS because the patient pays no charges and/or does not consume their SMS bundle.

You can use toll free numbers for SMS and there are no additional rental charges when using them. Lumeon can get TFNs validated so that they are less likely to be blocked by carriers. Conductor configuration is greatly simplified if separate TFNs (or short codes) are used for each Conductor use case. Note that TFNs are not toll-free for SMS. Sending to and receiving from TFNs incurs the same charges/bundle usage as sending or receiving from a regular phone number. Short codes are preferred over TFNs if messages can contain marketing material, PHI or URLs.

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 È É Ñ Ò Ó 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
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 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

Languages where Conductor supports text to speech

Conductor supports the following text-to-speech options:

- **Vonage** (formerly Nexmo and TokBox)- see <https://developer.vonage.com/voice/voice-api/guides/text-to-speech> for supported languages.
- **Google** - see <https://cloud.google.com/text-to-speech/docs/voices> for supported languages.

Lumeon recommends Vonage text-to-speech versions for non-English languages because the SSML support is better than in Google text-to-speech. In particular, Vonage supports the SSML **<language>** tag where text such as location names, patient names, and provider names, can be said in English. Google text-to-speech is a good option for English because it sounds more "human".

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
<code>Communication.SMS</code>	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.
<code>Communication.IVRCallStates</code>	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.

Glossary

Speech Synthesis
Markup Language
(SSML)

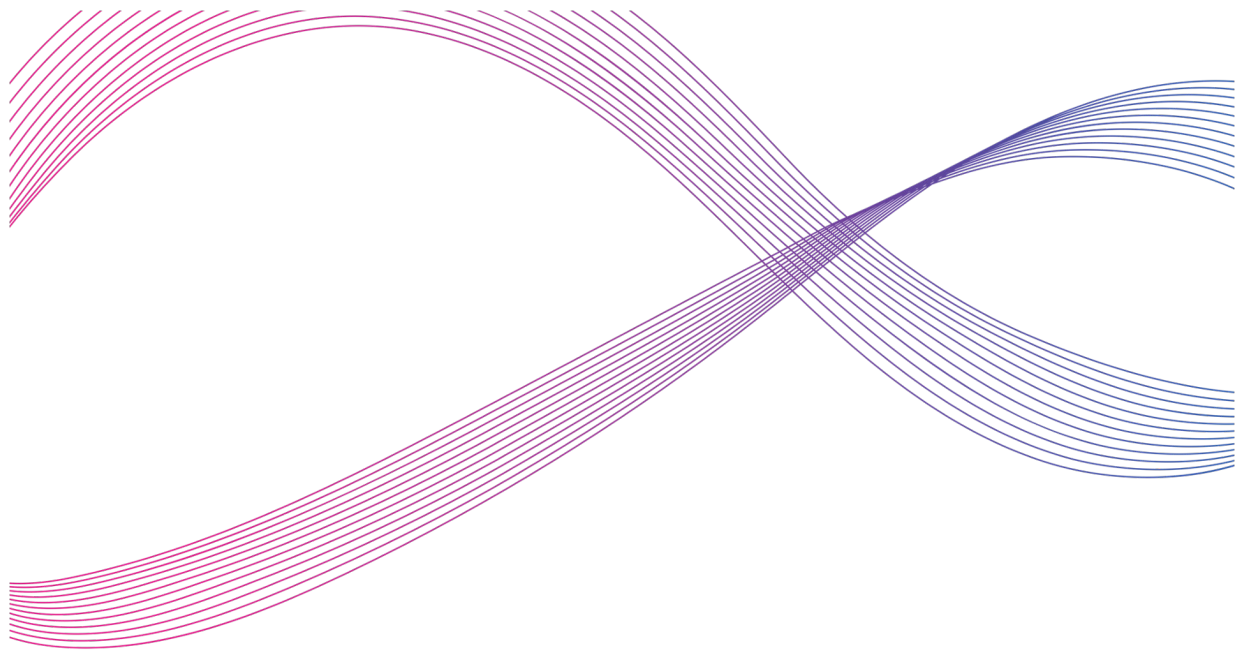
A markup language that enables you to add formatting to a text-to-speech message. For example, you can add pauses to the message, or you can define how you want to speak acronyms, dates, and times.

See, for example,
<https://developer.vonage.com/voice/voice-api/guides/customizing-tts>
and <https://cloud.google.com/text-to-speech/docs/ssml>.

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.



Digital Round Setup in Lumeon Conductor 24.2

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Introduction

Lumeon Conductor provides a comprehensive care orchestration platform with a number of features including digital rounds.

The digital rounds feature enables care team collaboration and communication leveraging digital tools and background automation. You can use it in the interdisciplinary rounds process to manage updates to the anticipated date of discharge, track action items, and automatically route tasks in the EHR to appropriate team members.

Purpose

The purpose of this document is to describe how to set up:

1. [Search templates \(page 4\)](#)
2. [Worklist sets and groups \(page 11\)](#)
3. [Worklist templates \(page 14\)](#)
4. [Care teams \(page 20\)](#)
5. [Round audit forms \(page 23\)](#)
6. [Round types \(page 31\)](#)
7. [Task types \(page 34\)](#) and [task collections \(page 38\)](#)
8. [Quick view actions \(page 41\)](#)
9. [Quick view templates \(page 44\)](#)

See **Digital Rounds in Lumeon Conductor** for information on how to:

- Conduct rounds
- Perform round audits

Search templates

Search templates control which patients appear in which round types. For example, if the round facilitator is creating a round for oncology patients in units on the 7th floor of Lumeon Hospital, the search template can identify patients on the 7th floor with an oncology diagnosis.

The **Search Templates** page enables you to view existing search templates, create new search templates, and update existing ones.

To view the **Search Templates** page, click **Search Templates** in the **Digital Rounding** menu. The **Search Templates** page displays a table of the existing search templates.

Name

CREATE NEW

Search:

Name	
fun test (In Use)	Clone
fun test (clone)	Clone
Patient Round Demo (In Use)	Clone
Heart Failure - EDD < 2 Days	Clone
Patient Round Demo (clone)	Clone
Patient Round Demo (clone)	Clone
Patient Round Demo (copy of 'in use')	Clone
Patient Round Demo (copy of 'in use') (clone)	Clone
Patient Round Demo (copy of 'in use') (clone) (clone) (In Use)	Clone
Ward 10	Clone
Ward 10 Search Template (In Use)	Clone
Patient Experience Round (In Use)	Clone
Patient Experience Round (clone)	Clone
Floor 3 Oncology	Clone

Showing 1 to 14 of 14 entries

First

Previous

1

Next

Last

To search for a specific template, enter text in the **Search** field. As you type, Conductor displays search templates that match the entered text.

If you have more than one page of search templates, you can use the following options:

- **First** - Click to display the first page of search templates.
- **Previous** - Click to display the previous page of search templates.
- **[Number]** - Click on a number to display that page of search templates.
- **Next** - Click to display the next page of search templates.
- **Last** - Click to display the last page of search templates.

Create a search template

You can either create a new search template or you can make a copy of an existing one and change it.

Create a new search template

To create a new search template:

1. Click **Create New** in the top right corner of the **Search Templates** page. The **Create Search Template** window displays.

2. Enter the required details using the table of fields below - see [Search template fields \(page 8\)](#). When you select a base object, more fields display.

- You can add extra filters by clicking the **Add New Join Filter Group** button to display a **Join Filter Groups** section.

For example, if you want to build a search template that extracts information from a base object of activity, but you also want to include some information about round participants (such as the name of the attending provider), or information from the encounter that is stored in a separate table, you can use join filter groups to run subqueries to gather data from these separate entities.

* For filter points

encoun... equal ☐ Twig Ward_10 - ☐

ADD FILTER **GROUP**

Join Filter Groups

Data Point	Operator	Value	
parent_activity.encounter.encounter_participant.id	equal	☐ Twig	-
			+
Show			
			+
Show			

REMOVE THIS GROUP

REMOVE THIS GROUP

ADD NEW JOIN FILTER GROUP

CANCEL **PREVIEW** **SUBMIT**

Click **+** to add a new line in the filter group. Select the data point and the operator, and enter the value as text or select the **Twig** check box and enter a Twig expression.

In the **Show** field, select the information that you want to display from the drop-down list. You can select as many items as you want. For example, you may want to show the first name and last name of the attending provider.

For more complex searches, you may need to work with Lumeon Support to help you to extract the right information.

- When you have entered all the search criteria, click **Submit**. Conductor adds the new search template to the table of existing search templates.

You can preview the search template to see what it looks like - see [Preview a search template \(page 7\)](#).

Clone an existing search template

You can also create a new search template by making a copy of an existing search template. To do this:

- Click **Clone** on the line of the search template that you want to copy. Conductor creates a copy of the search template with the same name and **(clone)** added to the end of the name.

Floor 3 Oncology	Clone
Floor 3 Oncology (clone)	Clone

2. Click the name of the search template clone to display the **Update Search Template** window with the details of the search template.
3. Change the name of the search template.
4. Change the other details of the search template using the table of fields below - see [Search template fields \(page 8\)](#).
5. When you have updated the search template, click **Submit**.

You can preview the search template to see what it looks like - see [Preview a search template \(page 7\)](#).

Preview a search template

You can preview a search template after you have created it to see what it looks like. If a search template is in use, its name is displayed in black text, its name is appended with **(In Use)**, and you cannot click on it to preview it.

To preview an existing search template that is not in use:

1. In the table of existing search templates, click the name of the search template that you want to update. The **Update Search Template** window displays.

Update Search Template

* Search Name

Unit 10 Search Template

* Show

* Using the base object of

Activity

* Show

Id

Patient.id

Patient.forename

Patient.surname

Patient.nhs_number

Encounter.id

Encounter.patient_id

Encounter.encounter_status

Encounter.period_start

Encounter.period_end

Encounter.location.facility

Encounter.location.floor

Encounter.location.room

Encounter.location.bed

* For filter points

encount...

equal

☐ Twig

Ward_10

-

☐

ADD FILTER

GROUP

Join Filter Groups

ADD NEW JOIN FILTER GROUP

CANCEL

PREVIEW

SUBMIT

- Click **Preview** to display a table of the results from the search template.

Update Search Template

* Search Name

Unit 10 Search Template

* Show

* Using the base object of

Activity

* Show

Id

Patient.id

Patient.forename

Patient.surname

Patient.nhs_number

Encounter.id

Encounter.patient_id

Encounter.encounter_status

Encounter.period_start

Encounter.period_end

Encounter.location.facility

Encounter.location.floor

Encounter.location.room

Encounter.location.bed

* For filter points

encount...

equal

☐ Twig

Ward_10

-

☐

ADD FILTER

GROUP

Join Filter Groups

ADD NEW JOIN FILTER GROUP

CANCEL

PREVIEW

SUBMIT

Id	Patient.Id	Patient.Forename	Patient.Surname	Patient.Nhs_number	Encounter.Id	Encounter.Patient_id	Encounter.Encounter_status	E ^
48129	17589	John	Kelly		38	17589	In-Progress	2
48132	17592	Sally	Kite		42	17592	In-Progress	2
48135	17595	Jonathon	Khoa		46	17595	In-Progress	2
48579	17764	Dan	Test		55	17764	In-Progress	2

- You can update and preview the search template until you are happy with it.
- When you have finished previewing the search template, click **Submit** to save any changes.

Search template fields

Use the following table to complete the search template details. Fields with an asterisk (*) are mandatory.

Field name	Description
Search Name *	Enter the name of the search template.
Using the base object of *	Select, from the drop-down list, the object that you want to use to define your search criteria. For example, you may want to use activity, patient, or encounter. When you select an object, the following fields display.
Show *	Select, from the drop-down list, the information that you want to display in the round. You can select as many items as you want. For example, you may want to show the patient's first name, last name, and date of birth.



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8

Field name	Description															
For filter points *	Use this section to build up the search criteria for the patients in the round. First, select all or any from the drop-down list: • Select all if you want patients that meet all the following search criteria. For example, if your search criteria are floor 3 and an oncology diagnosis, all selects only patients that are on floor 3 with an oncology diagnosis. • Select any if you want patients that meet any of the following criteria. For example, if you want to review patients that are either on the 7th floor or have an oncology diagnosis (but are perhaps in an overflow bed somewhere else), you can enter the search criteria so that any means that patients qualify if any one of those criteria are met. Next, enter a filter point. Select the operand, such as equal, less_than, greater_than_or_equal, or contains. Then enter a value as text or Twig statements. If you enter Twig, Conductor evaluates it when it uses the template to search for patients to include in the round. For example, to select patients on floor 3, enter: <code>encounter.location.floor equal Floor_3</code> If you want to add more filters, click Add Filter. Then enter a filter point. For example, you may want to add a filter to select patients with an oncology diagnosis: <code>parent_activity.encounter.encounter_diagnosis.id equal Oncology</code> Values in filter points are case sensitive so you must ensure that you have entered the term using the exact combination of lower and upper case letters in the database. If you want to filter on a list of items, such as room numbers, you must not have spaces between the items, for example: <code>encounter.location.room equal P873,P874,P875,P876,P877,P878</code> Keep adding filters as required.															
Join Filter Groups	Click the Add New Join Filter Group button to display a Join Filter Groups section. * For filter points encoun... equal ☐ Twig Ward_10 ☐ ADD FILTER GROUP REMOVE THIS GROUP <table border="1"> <thead> <tr> <th>Data Point</th><th>Operator</th><th>Value</th></tr> </thead> <tbody> <tr> <td> parent_activity.encounter.encounter_participant.id </td><td> equal </td><td>☐ Twig </td></tr> <tr> <td colspan="3">Show </td></tr> </tbody> </table> Join Filter Groups <table border="1"> <thead> <tr> <th>Data Point</th><th>Operator</th><th>Value</th></tr> </thead> <tbody> <tr> <td colspan="3">Show </td></tr> </tbody> </table> ADD NEW JOIN FILTER GROUP CANCEL PREVIEW SUBMIT Click + to add a new line in the filter group. Select the data point and the operator, and enter the value as text or select the Twig check box and enter a Twig expression. In the Show field, select the information that you want to display from the drop-down list. You can select as many items as you want. For example, you may want to show the first name and last name of the attending provider.	Data Point	Operator	Value	parent_activity.encounter.encounter_participant.id	equal	☐ Twig	Show			Data Point	Operator	Value	Show		
Data Point	Operator	Value														
parent_activity.encounter.encounter_participant.id	equal	☐ Twig														
Show																
Data Point	Operator	Value														
Show																

Update a search template

You can update a search template if it is not being used in a worklist template. If a search template is in use, its name is displayed in black text, its name is appended with **(In Use)**, and you cannot click on it to display it.

To update an existing search template that is not in use:

1. In the table of existing search templates, click the name of the search template that you want to update. The **Update Search Template** window displays.

Update Search Template

* Search Name

Floor 3 Oncology

* Show

* Using the base object of

Activity

* Show

Patient.forename

Patient.surname

Patient.dob

* For filter points

all

where

parent...

equal

Twig

Floor_3

-

parent...

equal

Twig

Oncology

-

ADD FILTER

GROUP

Join Filter Groups

ADD NEW JOIN FILTER GROUP

CANCEL

PREVIEW

SUBMIT

2. Change the details of the search template, as required, using the table of fields - see [Search template fields \(page 8\)](#).
3. When you have finished updating the search template, click **Submit** to save the changes.



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10

Worklist sets and groups

Worklist sets are collections of worklist templates.

You can also create worklist groups on this page. These are subsets of worklist sets. They form the headings that group together similar worklists on the **Worklists** page.

The **Worklist Sets** page enables you to view existing worklist sets, create new worklist sets, update existing ones, or cancel a worklist set.

To view the **Worklist Sets** page, click **Worklist Sets** in the **Digital Rounding** menu. The **Worklist Templates** page displays a table of the existing worklist sets.

Worklist Sets				
ID	Order	Name	Worklist Groups	
1	1	Pre-Surgical Optimization	6	Edit
3	2	Population health	0	Cancel Edit
4	3	Patient access	0	Cancel Edit
11	3	Survey	0	Cancel Edit
5	4	Transitions of care	0	Cancel Edit
12	4	Survey follow-up	0	Cancel Edit
7	5	Diabetes	4	Edit
8	6	Medicare Annual Wellness Worklist	5	Edit
9	7	Diabetes Worklist	4	Edit
10	8	Post-Discharge Worklist	4	Edit
13	10	Digital Rounds	1	Edit
14	11	Task Management	6	Edit
16	12	CCA Task Management	2	Edit
15	20	Automated Procedure Preparation	3	Edit

Worklist Set

Sort Order

Name

SAVE

Worklist Group

Set

Sort Order

Name

SAVE

Create a worklist set

To create a new worklist set:

1. In the **Worklist Set** section of the **Worklist Sets** page, enter the sort order. This is the order that the worklist set displays to users in the drop-down list in the **Worklists** menu on the **Worklists** page.



The screenshot shows a form titled "Worklist Set". It has two input fields: "Sort Order" with the value "10" and "Name" with the value "Digital Rounds". A blue "SAVE" button is located at the bottom right of the form.

2. Enter the name of the worklist set.
3. Click **Save**. Conductor adds the new worklist set to the table of existing worklist sets.

Edit a worklist set

To edit an existing worklist set:

1. Click **Edit** in the line of the worklist set that you want to edit. The details of the worklist set display in the **Worklist Set** section of the **Worklist Sets** page.



The screenshot shows a form titled "Worklist Set". It has two input fields: "Sort Order" with the value "10" and "Name" with the value "Digital Rounds". A blue "SAVE" button is located at the bottom right of the form.

2. Change the sort order, if required.
3. Change the name or the name of the worklist set, as required.
4. Click **Save** to update the worklist set.

Cancel a worklist set

You can cancel a worklist set if you no longer want it. You can only do this if the worklist set

To cancel an existing worklist set:

1. Click **Edit** in the line of the worklist set that you want to edit. The details of the worklist set display in the **Worklist Set** section of the **Worklist Sets** page.



The screenshot shows a form titled "Worklist Set". It has two input fields: "Sort Order" with the value "10" and "Name" with the value "Digital Rounds". A blue "SAVE" button is located at the bottom right of the form.

2. Change the name or the name of the worklist set, as required.
3. Click **Save** to update the worklist set.

Worklist groups

Worklist groups are subsets of worklist sets. You can create as many worklist groups within a worklist set as you want.

To create a new worklist group:

1. In the **Worklist Group** section of the **Worklist Sets** page, select the worklist set from the drop-down list. This is the worklist set that you want the worklist group to belong to.

Worklist Group

Set: Digital Rounds ▼

Sort Order: 1

Name: Digital Rounds

SAVE

2. Enter the sort order. This is the order that you want the worklist groups to appear within the worklist set for users in the menu on their **Worklists** page.
3. Enter the name of the worklist group.
4. Click **Save**.

If you click **Edit** next to the worklist set that you added the worklist group to, you can see the details of the worklist group in the **Digital Rounds Subset** section.

Worklist Set

Sort Order: 10

Name: Digital Rounds

SAVE

Digital Rounds Subset

ID	Order	Name
25	1	Digital Rounds

[Cancel](#) [Edit](#)

You can edit the worklist group by clicking **Edit** in the row. For example, you may want to change the sort order that the worklist groups appear in the **Worklists** page.

Worklist templates

Worklist templates define the format of how worklists display on the **Worklists** page.

The **Worklist Templates** page enables you to view existing worklist templates, create new worklist templates, and update existing ones.

To view the **Worklist Templates** page, click **Worklist Templates** in the **Digital Rounding** menu. The **Worklist Templates** page displays a table of the existing worklist templates.

Name

EXPERT WORKLIST CONFIGURATION

CREATE NEW

Search:

Set	Group	Name	Order	ID	Page Size	
Pre-Surgical Optimization	Scheduling	Management Stats	0	55	50	Fields
Pre-Surgical Optimization	Day of Surgery	Surgery Post-Discharge	0	56	30	Fields
Digital Rounds	Digital Rounds	Unit A, Cardiology Floor, Product Demo Medical Center	0	57	20	Fields
Digital Rounds	Digital Rounds	Floor 7, Cardiology, Lumeon Hospital	0	66	20	Fields
Digital Rounds	Digital Rounds	Patient Experience Round	0	67	20	Fields
Task Management	Lumeon Test Worklists	MJ Test Hack	10	80		Fields
Digital Rounds	Digital Rounds	Patient EXP clone	0	81		Fields

Showing 1 to 7 of 7 entries

First

Previous

1

Next

Last

The table shows the set and group that the template belongs to. It also shows the order of the template in the worklist group on the **Worklists** page, the ID of the template, and its page size.

To search for a specific worklist template, enter text in the **Search** field. As you type, Conductor displays worklist templates that match the entered text.

If you have more than one page of worklist templates, you can use the following options:

- **First** - Click to display the first page of worklist templates.
- **Previous** - Click to display the previous page of worklist templates.
- **[Number]** - Click on a number to display that page of worklist templates.
- **Next** - Click to display the next page of worklist templates.
- **Last** - Click to display the last page of worklist templates.

You can click:

- The set name or the group name to display the **Worklist Sets** page - see [Worklist Sets \(page 11\)](#).
- The worklist name to display and update its details - see [Update a worklist template \(page 19\)](#).
- **Fields** to display or update the table of the columns within the worklist template - see [Define worklist template columns \(page 16\)](#).

Create a worklist template

To create a new worklist template:

1. Click **Create New** in the top right corner of the **Worklist Templates** page. Do not use the **Expert Worklist Configuration** button as this is not necessary for digital rounds worklist. The **Create Worklist Template** window displays.

2. Enter the required details using the table of fields below - see [Worklist template fields \(page 15\)](#).
3. When you have entered all the worklist template information, click **Submit**. Conductor adds the new worklist template to the table of existing worklist templates.
4. Click **Fields** in the line of the worklist template you have created to define the columns you want the worklist template to contain - see [Define worklist template columns \(page 16\)](#).

Worklist template fields

Use the following table to complete the worklist template details. Fields with an asterisk (*) are mandatory.

Field name	Description
Name *	Enter the name of the worklist template.
Sort Order *	Enter the sort order number for this worklist template. This defines the position where the template appears in the worklist group on the Worklists page.
Time To Live *	Enter the time, in seconds, that the browser caches the worklist before refreshing it.
Page Size	Enter the page size for the worklist template. This is the number of rows displayed on a page in the worklist.
Worklist Group *	Select the worklist group that the worklist template belongs to. This defines the worklist group that the worklist appears in on the Worklists page.
Search Template *	Enter the search template to use for the worklist template.
User data constraints	Select this check box if you want to filter the worklist by any constraints for the current user. For example, if the user accessing the worklist can only view a specific location, the worklist is filtered to display records at that location.

Field name	Description
Access *	Select the user types that can view this worklist from the drop-down list. You can select as many user types as you want.

Define worklist template columns

After you have created a worklist template, you must define the columns you want the worklist template to contain. To do this:

1. Click **Fields** in the line of the worklist template you have created. The **Update Worklist Template Fields** window displays. When you display this window for the first time, the fields automatically include the patient's first name, last name, and date of birth.

Update Worklist Template Fields

[CANCEL](#)

Order	Data Sort Order	Data Sort Direction	Data Point	Type	Worklist Column Name	Twig Template	Action
0	0	ASC	patient.forename x	Display	patient.forename		
0	0	ASC	patient.surname x	Display	patient.surname		
0	0	ASC	patient.dob x	Display	patient.dob		

[SAVE](#)
Add new Column

2. Click **Add New Column** to add a new column to the worklist template definition. Then enter the required details using the table of fields below - see [Worklist template column fields \(page 17\)](#).
3. Click **Remove** at the far right of a column if you want to remove it from the worklist.
4. You must include a column within the worklist template that contains an action to open the quick view template that you want to associate with this worklist. This enables a round facilitator to click on the button defining the action to display the patient details. See [Worklist template column fields \(page 18\)](#) for the fields you must complete to link the quick view template to the worklist.

Update Worklist Template Fields

Type	Worklist Column Name	Twig Template	Action	Button Type	Caption
Patient ID					
Encounter ID					
Treatment Cycle Referral ID					
Display	Room				
Display	Bed				
Display	Name	{{patient.forename}} {{patient.surname}}			
Display	Attending Provider	Dr. Jane Smith			
Display	Bedside Nurse	Will James, RN			
Display	ADOD	{{encounter.period_end}}			
Display	View Patient		Open "Patient View" Quick View	Secondary	View Patient
Display	Review		Complete Patient Round	Secondary	Patient Seen

5. When you have added all the worklist template columns, click **Save**.

An example of a more complex worklist template column definition is shown below:

Update Worklist Template Fields

[CANCEL](#)

Order	Data Sort Order	Data Sort Direction	Data Point	Type	Worklist Column Name	Twig Template	Action
0	0	ASC	patient.id	Patient ID	Patient ID		
0	0	ASC	encounter.id	Encounter ID	Encounter ID		
0	0	ASC	id	Treatment Cycle Referral ID	Treatment Cycle Referral ID		
5	5	ASC	encounter.location.room	Display	Room		
7	7	ASC	encounter.location.bed	Display	Bed		
10	10	ASC	patient.forename	Display	Name	{{patient.forename}} {{patient.surname}}	
16	16	ASC		Display	Attending Provider	Dr. Jane Smith	
17	17	ASC		Display	Bedside Nurse	Will James, RN	
18	18	ASC		Display	Patient Class	Inpatient	
20	20	ASC	encounter.period_end	Display	EDD	{{ encounter.period_end }}	
21	21	ASC		Display	Principal Problem	Heart Failure	
25	25	ASC		Display	Current LOS	{{ date().diff(date(encount	
26	26	ASC		Display	Expected LOS	{% set startDate = encounter.period_start	
28	28	ASC		Display	Primary Payer	Medicare	
30	30	ASC		Display	View Patient		Open Demo Quick View

Worklist template column fields

Use the following table to complete the information for each column that you want to add to the worklist template.

Field name	Description
Order	Enter the sort order number for this column. This defines the position of the column in the worklist when a user views it on the Worklists page. Number 1 means the column on the far left of the worklist and subsequent numbers display to the right.
Data Sort Order	Enter a number representing the order that the columns are sorted when a user displays the worklist. For example, you might select floor as 1, room as 2, and bed as 3. When a user displays the worklist, the patients are sorted by floor, then room, and then bed.
Data Sort Direction	Select the sort direction from the drop-down list, either: ASC - Sorts the rows in the column in ascending order. DESC - Sorts the rows in the column in descending order.
Data Point	Select the data point for this column from the drop-down list.
Type	Select the type of data for this column from the drop-down list.
Worklist Column Name	Enter the text that you want to appear as the name of the column in the worklist.
Twig Template	If you want to use Twig to define the content of this column, enter it here.
Action	If you want a user to be able to carry out an action by clicking on this field, enter the action here. For example, if the user can open the patient quick view by clicking on this field, enter that action. If you enter an action, complete the Button Type and Caption fields.

Field name	Description
Button Type	If the user can click on this field to carry out an action, select the type of button that displays, one of: • Primary - Displays a button in the primary color of the Conductor palette. • Secondary - Displays a button in the secondary color of the Conductor palette. • Context - Displays a button that appears as text.
Caption	If the user can click on this field to carry out an action, enter the text that you want to appear on the button.
Alignment	Select the alignment of the field, one of: • Left - the field is left aligned. • Centre - The field is centered. • Right - The field is right aligned.
Sortable	Select the Sortable checkbox if you want users to be able to sort the column. Clear it if you do not want users to be able to sort the column.
Printable	Select the Printable checkbox if you want users to be able to include the column in reports. Clear it if you do not want users to be able to include the column in reports.
Responsive Order	Not in use

Worklist template column fields

To link a quick view template to a worklist template, you must complete the following fields in the **Update Worklist Template Fields** window:

Field name	Description
Type	Select Display from the drop-down list.
Worklist Column Name	Enter the text that you want to appear as the name of the column in the worklist.
Action	If you want a user to be able to carry out an action by clicking on this field, enter the action here. For example, if the user can open the patient quick view by clicking on this field, enter that action. If you enter an action, complete the Button Type and Caption fields.
Button Type	Select the type of button that displays, one of: • Primary - Displays a button in the primary color of the Conductor palette. • Secondary - Displays a button in the secondary color of the Conductor palette. • Context - Displays a button that appears as text.
Caption	Enter the text that you want to appear on the button.

Update a worklist template

To update an existing worklist template:

1. Click the name of the worklist template in the table of existing worklist templates. The **Update Worklist Template** window displays.

Update Worklist Template

✕

* Name

Floor 7, Cardiology, Lumeon Hospital

* Sort Order

0

* Time To Live

0

Page Size

20

☒ Show location filter

☐ Include patient log

* Worklist Group

IDR

* Search Template

Ward 10 Search Template

☐ User data constraints

* Access

System Administration ✕

Doctor ✕

CANCEL

SUBMIT

2. Enter the required details using the table of fields below - see [Worklist template fields \(page 15\)](#).
3. When you have updated the worklist template, click **Submit**.

Care teams

A care team is a group of people who are kept informed about and contribute to a patient's care journey. Each member of the care team needs to be informed about various activities and what is needed of them at the right time and in the right way.

When you set up a digital round, you can select which care teams you want to include as core members of the round or as ancillary members.

Each care team is assigned to an individual type, such as a doctor or an administrator.

Default care teams

There are several existing default care team roles. You can rename them but not cancel or change them. The default care team roles, and their associated individual types, are:

- Patient (Patient)
- Referrer (External Practitioner)
- Care Coordinator (Administration)
- Primary Care Physician (External Practitioner)
- Controlling Specialist (Doctor)
- Coach (Third Party)

Create a new care team

You can set up additional care team roles. To do this:

1. Select **Care Teams** in the **Pathway Logic** menu. The **Care Team Roles** page displays with a table of existing care team roles on the left and the **Create New Care Team Role** form on the right.

Care Team Roles		
Name	Individual Type	
Patient	Patient	
Referrer	External Practitioner	
Care Coordinator	Administration	
Primary Care Physician	External Practitioner	
Controlling Specialist	Doctor	
Coach	Third Party	
Driver	Third Party	Cancel
Charge Nurse	Doctor	Cancel
Attending Provider	Administration	Cancel
Case Manager	Administration	Cancel
Social Worker	External Practitioner	Cancel
Chaplain	Administration	Cancel
Occupational Therapy	Administration	Cancel
Pharmacy	Administration	Cancel
Respiratory Therapy	Administration	Cancel
Wound Care / WOCN	Administration	Cancel
Nutrition	Administration	Cancel
Palliative Care	Administration	Cancel
Physical Therapy	Administration	Cancel
Speech Therapy	Administration	Cancel
Bedside Nurse	Administration	Cancel
Temporary Collection Owner	Administration	Cancel

Create New Care Team Role

* Name

* Individual Type

☐ Core role ☐ Ancillary role

CREATE

2. In the **Create New Care Team Roles** form, enter the name of the care team.

Create New Care Team Role

* Name

* Individual Type

☐ Core role ☐ Ancillary role

CREATE

3. Select the individual type associated with the care team from the drop-down list.
4. Select whether this care team is a core role or an ancillary role. The care team does not appear in the list of core roles or ancillary roles unless you select one of these options.

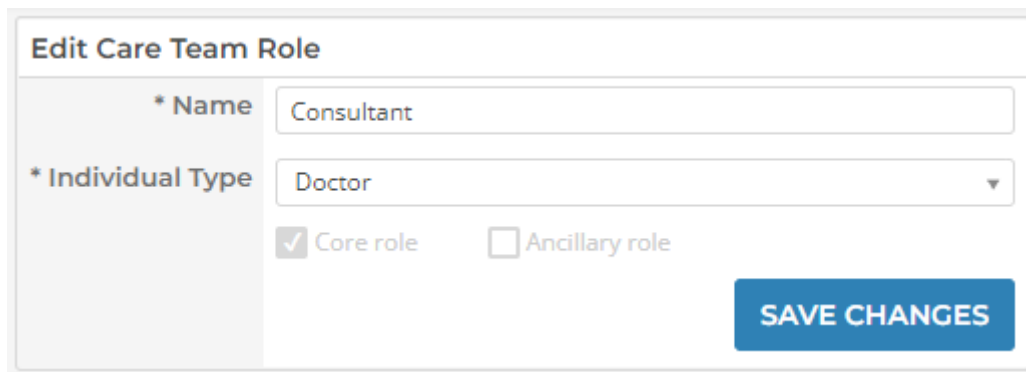
5. Click **Create**. The new care team appears in the table of existing care team roles.

You can now include the care team in the digital round as a core role or an ancillary role, as appropriate.

Edit a care team

To edit an existing care team:

1. Click the name of the care team that you want to change. The **Edit Care Team Role** form displays.



2. You can change the name of the care team or the individual type associated with it. You cannot change whether the care team is a core role or an ancillary role once you have used the care team in a round type.
3. Click **Save Changes** to update the care team.

Delete a care team

You can delete a care team by clicking **Cancel** in the row of the care team in the table of care team roles.

Round audit forms

Each round type has two round audit form associated with it:

- **Audit round form** - This form displays as a separate section at the beginning of the round audit. It may contain the number of patients in the round and general questions about the round for the round auditor to complete.
- **Audit patient form** - This form displays as a separate section for each patient on the round. The round auditor can complete the questions for each patient or skip the patient.

To create a round audit form, you must:

- [Create questions \(page 23\)](#) for the audit patient form, and for the audit round form if you are including it.
- [Create digital round audit forms \(page 27\)](#) using the questions you have created.

See **Forms in Lumeon Conductor** for more detailed information on question types, creating question conditions, and building round audit forms.

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 the user who will use the form.

To create questions to be used in a digital round form:

1. Select **Questions** in the **Forms & EMR** menu. The **Question Search** displays on the left and the **Add Question** form displays on the right.

2. To see if a question already exists, enter a key word in the **Question Search** field on the left and click **Search**.

Question Search

SEARCH

Search Results

- New Patient - Alcohol 1
- New Patient - Alcohol 2
- New Patient - Alcohol 3
- New Patient - Alcohol 4
- New Patient - Allergies
- New Patient - Children
- New Patient - Children Number
- New Patient - Exercise
- New Patient - Family Medical Conditions
- New Patient - Medical Conditions
- New Patient - Medication
- New Patient - Phone
- New Patient - Pregnant
- New Patient - Pregnant Weeks
- New Patient - Smoking 1
- New Patient - Smoking 2
- New Patient - Water
- New Patient - Weight

Add Question

Name

Question (Default Language)

Type
Short text

Question Translations

af_ZA
de_DE
en_US
es_ES
fr_FR

DELETE TRANSLATIONS

Unit Text

☐ Box for notes

Validity (days)

Previous response scope
Full patient history

Report Question Name

Tags

Read Code

Visibility Rule

☐ Track outcomes
☐ Share on HL7 Interface
☒ Show EMR2 Area of Concern switch
☐ Question Score

Cancel

SAVE

3. To create a new question, complete the **Add Question** form using the table below, and click **Save**.

Add Question

Name

New Patient - Exercise 2

Question (Default Language)

How many times a week do you exercise for 30 minutes or more?

Type

Slider

Minimum Value

1

Maximum Value

10

Step Size

1

Question Translations

af_ZA

de_DE

en_US

es_ES

fr_FR

DELETE TRANSLATIONS

Unit Text

☐

Box for notes

Validity (days)

90

Previous response scope

Full patient history

Report Question Name

Tags

new patient

Read Code

Visibility Rule

☐

Track outcomes

☐

Share on HL7 Interface

☒

Show EMR2 Area of Concern switch

☐

Question Score

Cancel

SAVE

4. If you want to create an audit round form that includes a field that automatically displays the number of patients in the round, you must set up a whole number question that displays this information.
5. Continue to add the questions that you want to include in the new form.

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 provider. 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.
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. Do you smoke? Yes ▾ 1 response 11/11/2015 09:45 Yes Dr Hannah Qinec 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 providers 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 .

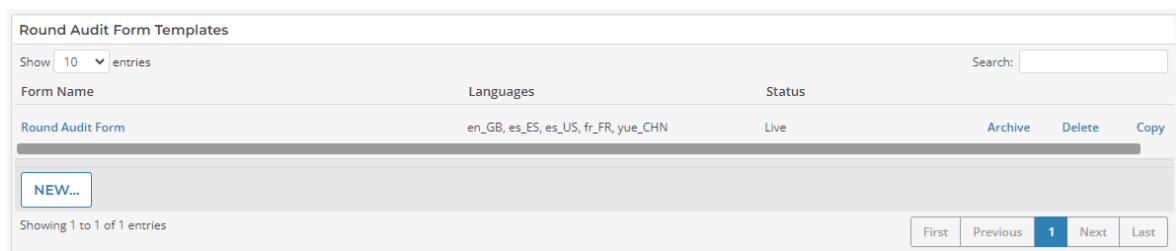
Field name	Description
Read Code	Enter a read code which is saved in the database and can be used when generating custom reports.
Visibility Rule	Not in use
Track outcomes	Enables reports to track outcomes. This can be used with number, height, or weight question types to create a graph of responses.
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.

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.

Question Search		
patients SEARCH		
Search Results		
⋮	Driver_OptOut	en_US
⋮	IDR_TEST_Number of Patients_WN	en_US
⋮	Round Audit - Number of Patients	en_US
⋮	Survey_Header	en_US

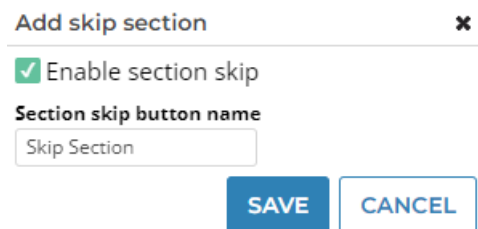
5. Once you have found the right question, click on the block of dots to the left of the question and drag it to the newly created section on the right. If the first section contains the question that displays the number of patients in the round, find the question that has **Patient round count** in the **Tags** field.

Oncology Round Audit Fo

⋮	Number of Patients	ALLOW SKIP X
No matching questions found.		
⋮	Round Audit - Number of Patients	Optional ▼ X
ADD SECTION		

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.

- 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**.



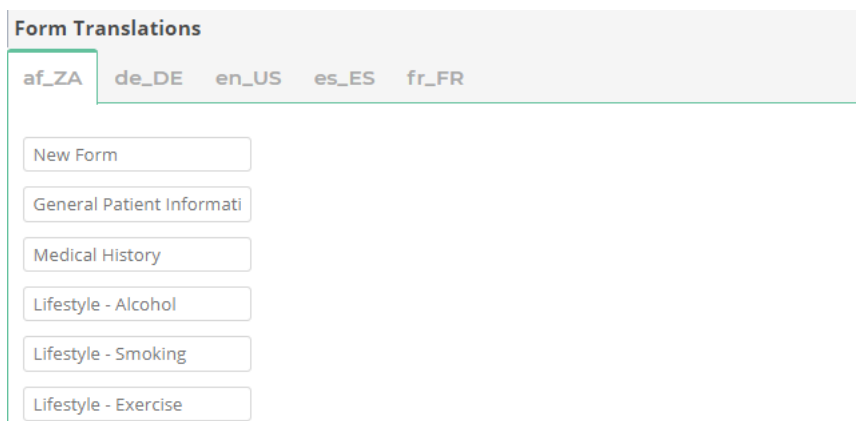
Add skip section ✕

☒ **Enable section skip**

Section skip button name

SAVE **CANCEL**

- Continue to add new sections and questions until the form is complete.
- 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).



Form Translations

af_ZA de_DE en_US es_ES fr_FR

- 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 \(page 30\)](#).



☒ **Enable Form Logic**

☒ **Display form in new UI**

☒ **Save whole form**

SAVE **SAVE AND ACTIVATE**

- 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**.
- 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**.

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.

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.

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.

Round types

The **Round Types** page enables you to view existing round types, create new round types, and update existing ones.

To view the **Round Types** page, click **Round Types** in the **Digital Rounding** menu. The **Round Types** page displays a table of the existing round types.

The screenshot shows the 'Round Types' interface. At the top, there's a 'Name' label and a search input field. To the right is a 'CREATE NEW' button. Below the search bar is a table with the following entries:

Name
Diabetes Monitoring
Floor 7, Cardiology, Lumeon Hospital
Hospital at Home
Hypertension Monitoring
Patient Experience Round
Surgery Post-Discharge

At the bottom of the table area, it says 'Showing 1 to 6 of 6 entries'. To the right of this are pagination buttons: 'First', 'Previous', '1' (which is highlighted in blue), 'Next', and 'Last'.

To search for a specific round type, enter text in the **Search** field. As you type, Conductor displays round types that match the entered text .

If you have more than one page of round types, you can use the following options:

- **First** - Click to display the first page of round types.
- **Previous** - Click to display the previous page of round types.
- **[Number]** - Click on a number to display that page of round types.
- **Next** - Click to display the next page of round types.
- **Last** - Click to display the last page of round types.

Create a round type

To create a new round type:

1. Click **Create New** in the top right corner of the **Round Types** page. The **Create Round Configuration** window displays.

2. Enter the round type details using the fields in the table below - see [Round type fields \(page 32\)](#).
3. Click **Create**. The round type displays in the table of existing round types.

Round type fields

Use the following table to complete the round type details. Fields with an asterisk (*) are mandatory.

Field name	Description
Name *	Enter the name of the round type.
Worklist Template *	Select the worklist template that you want to use for this round type.
Audit Patient Form	Select the form that you want to use for the patients in the round audit for this round type.
Audit Round Form	If you have a section for general information about the round audit for this round type, select the form that you want to use for this.
Core Roles *	Select a core role from the drop-down list. You can select as many core roles as you want. These are the roles of the staff that must be present when a round of this type is conducted.

Field name	Description
Ancillary Roles	Select an ancillary role from the drop-down list. You can select as many ancillary roles as you want. These are the roles of the staff that may be present when a round of this type is conducted but are not essential.
Scheduled Days	Select the days of the week that the round will be conducted on. This is for reporting purposes only and does not restrict when a round facilitator can conduct a round.
Start Time	Enter the estimated start time of the round. Either enter the hours and minutes or click on the clock symbol and select the time. This is for reporting purposes only and does not restrict when a round facilitator can conduct a round.
Average Time Per Patient	Use the up and down arrows to select the estimated time per patient. This is for reporting purposes only and does not affect the round.
Status *	The status default is Active so that as soon as you save the round type, it is available in the drop-down list in the Select Round field in the Start A Round section of the Digital Rounds page. This means that a round facilitator can use it as the basis for the round they are going to conduct. Change it to Inactive if you do not want the round type to be available in the drop-down list so that it cannot be selected.

Update a round type

To update an existing round type:

1. In the table of existing round types, click the name of the round type that you want to update. The **Update Round Configuration** window displays.

Update Round configuration ✕

* Name

* Worklist template

* Round Audit form

* Core Roles

Ancillary Roles

Scheduled days ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday ☐ Sunday

Start time

Ave. time per patient

Minutes	Seconds
5	0

2. Change the details of the round type, as required, using the table of fields - see [Round type fields \(page 32\)](#).
3. When you have finished updating the round type, click **Submit**.

Task types

Task types are pre-defined tasks that can be used across Conductor. They are generic, commonly used tasks that are often associated with patients. Pre-defining tasks saves users time because they do not need to enter them manually.

The **Task Types** page enables you to view existing task types, create new task types, and update existing ones.

To view the **Task Types** page, click **Task Types** in the **System Configuration** menu. The **Task Types** page displays a table of the existing task types.

Name

CREATE NEW

Name ▲	Options
Anticipated discharge date	CANCEL
Anticoagulant options	CANCEL
Appointment Cancelled (Patient Notification Fail)	CANCEL
Appointment Cancelled (Phone Patient)	CANCEL
Appointment Created (Patient Notification Fail)	CANCEL
Appointment Created (Phone Patient)	CANCEL
Appointment Follow Up	CANCEL
Appointment Reminder (Patient Notification Fail)	CANCEL

To search for a specific task type, enter text in the **Search** field. As you type, Conductor displays task types that match the entered text.

If you have more than one page of task types, you can use the following options:

- **First** - Click to display the first page of task types.
- **Previous** - Click to display the previous page of task types.
- **[Number]** - Click on a number to display that page of task types.
- **Next** - Click to display the next page of task types.
- **Last** - Click to display the last page of task types.

You can cancel a task type by clicking **Cancel**. This removes the task type from the table of task types. Conductor also removes the task type from any collections to which it belongs.

Create a task type

To create a new task type:

1. Click **Create New** in the top right corner of the **Task Types** page. The **Create Task Type** window displays.

Create Task Type

* Name

Physio initial assessment

Default Close Type

Complete

Can restrict individual types

☒

Individual Types

Doctor

External Provider

Has task form

☒

Task Form Type

Case Summary

Layout

Standard Layout

Link Validity (Days)

30

Task Action Links

Task Action Link 1

Default Task Subject

☐ Use Twig

Physio Initial Assessment

Default Task Detail

☐ Use Twig

This task is to perform an initial physiotherapy assessment on the patient.

Instructions

1

Default Priority

Normal

Default Assignee Type

Care Team

Default Assign to

Physical Therapy

Default Due Date

CANCEL

CREATE

2. Enter the task type details using the fields in the table below - see [Task type fields \(page 36\)](#).
3. Click **Create**. The task type displays in the table of existing task types.

Task type fields

Use the following table to complete the task type details. Fields with an asterisk (*) are mandatory.

Field name	Description
Name *	Enter the name of the task type.
Default Close Type	Select the default close type for this task type. Select either: • Complete - Sets the task to Complete when it ends. • Withdrawn - Sets the task to Withdrawn when it ends.
Can restrict individual types	Select this checkbox to restrict the task to certain user types. If you select it, the Individual Types field displays. Select the user types from the drop-down list that you want to perform this task type. You can select as many user types as you want. For example, select Doctor if you only want this user type to perform this task.
Has task form	Select this checkbox if you want to associate a form with this task type. If you select it, the following fields display: • Task Form Type - Select the form from the drop-down list that you want to associate with this task type. You can associate one form with a task type. • Layout - Select the layout of the form from the drop-down list that you want to associate with this task type. You can associate one layout with a task type. • Link Validity (Days) - Enter the number of days that the form link is valid for, or use the up and down arrows to change the number of days.
Task Action Links	Select any task action links from the drop-down list that you want for the task type. You can select as many task action links as you want.
Default Task Subject	Enter the default task subject. Either enter text or select the Use Twig checkbox and enter the Twig commands that will create the task subject when Conductor creates the task.
Default Task Detail	Enter the default task detail. Either enter text or select the Use Twig checkbox and enter the Twig commands that will create the task detail when Conductor creates the task.
Instructions	Enter the instructions for the task type.
Default Priority	The default priority is Normal. Either use this or select another priority from the drop-down list. When Conductor creates a task of this type, it assigns it this priority. The options are: • High • Normal • Low
Default Assignee Type	Select the default assignee type for this task type. Select one of the following options: • Task Queue - Conductor assigns new tasks of this type to a task queue. • Care Role - Conductor assigns new tasks of this type to a care team.
Default Assign To	Depending on the option you selected in the Default Assignee Type field, select the default task queue or default care team that Conductor assigns new tasks of this type to.
Default Due Date	Leave blank or enter the Twig commands that will create the due date and time when Conductor creates the task. For example if you want the due date/time to be four hours after the time when the task was created: <pre>{{ date('+ 4 hours') date('Y-m-d H:i') }}</pre>

Update a task type

To update an existing task type:

1. In the table of existing task types, click the name of the task type that you want to update, use the **Name** field to search for it, or use the options at the bottom of the page to navigate round the pages of task types. The **Update Task Type** window displays.

Update Task Type

* Name

Physio initial assessment

Default Close Type

Complete

Can restrict individual types

☒

Individual Types

Doctor

External Provider

Has task form

☒

Task Form Type

Case Summary

Layout

Standard Layout

Link Validity (Days)

30

Task Action Links

Task Action Link 1

Default Task Subject

☐ Use Twig

Physio Initial Assessment

Default Task Detail

☐ Use Twig

This task is to perform an initial physiotherapy assessment on the patient.

Instructions

1

Default Priority

Normal

Default Assignee Type

Care Team

Default Assign to

Physical Therapy

Default Due Date

CANCEL

UPDATE

2. Change the details of the task type, as required, using the table of fields - see [Task type fields \(page 36\)](#).
3. When you have finished updating the task type, click **Update**.

Task collections

Task collections are groups of related tasks. For example, a task collection could be "Organise patient transport" and tasks within it could be "Confirm patient has appropriate accommodation" and secondly "Contact patient's driver".

The **Task Collections** page enables you to view existing task collections, create new task collections, and update existing ones.

To view the **Task Collections** page, click **Task Collections** in the **Pathway Logic** menu. The **Task Collections** page displays a table of the existing task collections.

Name		CREATE NEW
Name ▲	Collection Type	
Arrange PAC facility	Task Group	CANCEL
Arrange transportation	Task Group	CANCEL
Auto Milestone test	Task Collection	CANCEL
Diagnostic Readiness	Task Collection	CANCEL
Home Services	Task Collection	CANCEL
Imaging Readiness	Task Collection	CANCEL
Obtain DME	Task Collection	CANCEL
PAC - Arrange Post Acute Care	Task Group	CANCEL

To search for a specific task collection, enter text in the **Search** field. As you type, Conductor displays task collections that match the entered text.

If you have more than one page of task collections, you can use the following options:

- **First** - Click to display the first page of task collections.
- **Previous** - Click to display the previous page of task collections.
- **[Number]** - Click on a number to display that page of task collections.
- **Next** - Click to display the next page of task collections.
- **Last** - Click to display the last page of task collections.

You can cancel a task collection by clicking **Cancel**. This removes the task collection from the table of task collections.

Create a task collection

To create a new task collection:

1. Click **Create New** in the top right corner of the **Task Collections** page. The **Create Task Collection** window displays.

Create Task Collection ✕

* Task Collection Name

* Collection Type

Task	Created
Completion of diagnostic order	Manually
Prioritize diagnostic order for discharge	Manually
Question for onsite CM	Manually
Select Task	Manually

CANCEL **CREATE**

2. Enter the task collection details using the fields in the table below - see [Task collection fields \(page 39\)](#).
3. Click **Create**. The task collection displays in the table of existing task collections.

Task collection fields

Use the following table to complete the task collection details. Fields with an asterisk (*) are mandatory.

Field name	Description
Task Collection Name *	Enter the name of the task collection.
Collection Type *	Leave as the default option of Task Collection .
Tasks	Enter the tasks that you want to add to the task collection. For each task: • Select the task from the drop-down list, or start typing to display tasks that match the entered text and select the correct one. • Select the required option for when Conductor creates the task: • Manually - Keep the default option if you want users to add the task to the task collection manually after the task collection has been created. • Automatically - Select this option from the drop-down list if you want Conductor to create the task automatically when the task collection is created. You can add as many tasks as you want to the task collection. Click on the red minus sign to remove a task from the task collection.

Update a task collection

To update an existing task collection:

1. In the table of existing task collections, click the name of the task collection that you want to update. The **Update Task Collection** window displays.

Update Task Collection ✕

* Task Collection Name

* Collection Type

Tasks	Task	Created	
	Completion of diagnostic order	Manually	—
	Prioritize diagnostic order for discharge	Automatically	—
	Question for onsite CM	Manually	—
	Select Task	Manually	

2. Change the details of the task collection, as required, using the table of fields - see [Task collection fields \(page 39\)](#).
3. When you have finished updating the task collection, click **Update**.

Quick view actions

You must create a quick view action to link the quick view template to the worklist so that the round facilitator can click on the action to display the details, or quick view, of a patient when they are conducting a digital round.

The **Actions** page enables you to view existing actions, create new actions, and update or cancel existing ones.

To view the **Actions** page, click **Actions** in the **Pathway Logic** menu. The **Actions** page displays a table of the existing actions.

You can display a specific type of action. To do this, select the type of action from the drop-down list in the **Action Type** field. For example, you may want to display quick view actions only.

The screenshot shows the 'Actions' page in Lumeon Conductor. At the top, there is a header with an 'Action' input field, an 'Action Type' dropdown menu set to 'Quick View', a 'New' button, and a 'CREATE' button. Below this is a table titled 'Existing Actions'. The table has seven columns: 'Action', 'Action Type', 'Create Event', 'Form Type', 'Patient Email Template', 'Communication Scheme Trigger', and 'Options'. The table contains six rows of actions, all of which are 'Quick View' type. The actions listed are: 'Open "Patient View" Quick View', 'Open Demo Quick View', 'Open Patient Experience Quick View', 'Open Task Collection', 'QA QV 1', and 'View Pt'. At the bottom of the table, there is a 'CANCEL' button. Below the table, a pagination bar indicates 'Showing 1 to 6 of 6 entries (filtered from 357 total entries)' and includes buttons for 'First', 'Previous', '1' (the current page), 'Next', and 'Last'.

To search for a specific action, enter text in the **Action** field. As you type, Conductor displays actions that match the entered text.

If you have more than one page of actions, you can use the following options:

- **First** - Click to display the first page of actions.
- **Previous** - Click to display the previous page of actions.
- **[Number]** - Click on a number to display that page of actions.
- **Next** - Click to display the next page of actions.
- **Last** - Click to display the last page of actions.

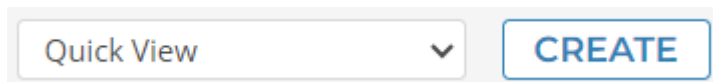
You can cancel an action by clicking **Cancel**. This removes the action from the table of actions. You can only cancel an action if it is not used in Conductor.

Create a quick view action

You must create a quick view action to link the quick view template to the worklist so that the round facilitator can click on it to view the details of each patient on the round.

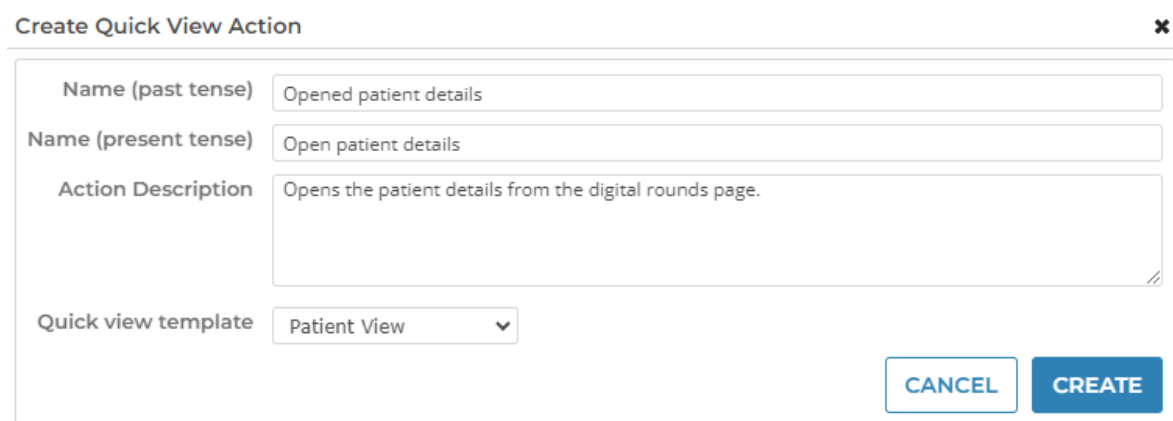
To create a new quick view action:

1. Select **Quick View** from the drop-down list in the **New** field in the top right corner of the **Actions** page and click **Create**.



A screenshot showing a dropdown menu with 'Quick View' selected and a blue 'CREATE' button next to it.

The **Create Quick View Action** page displays.



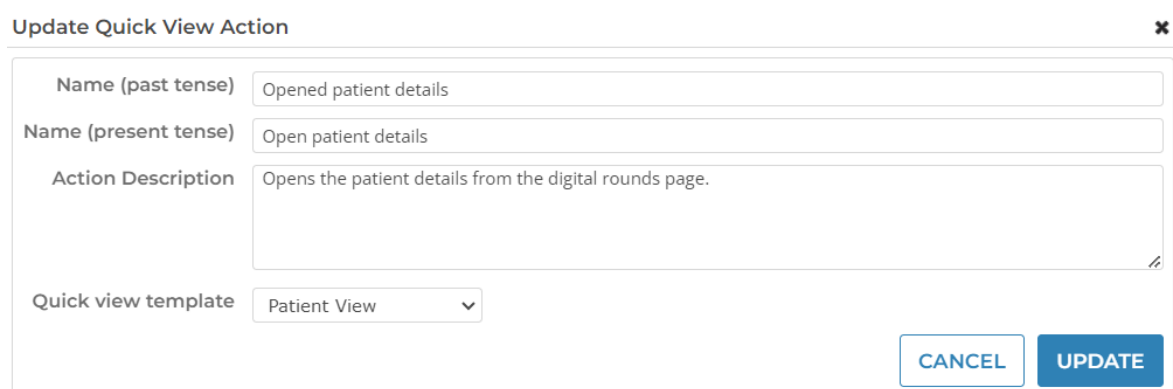
A screenshot of the 'Create Quick View Action' form. It has a title bar with a close button (X). The form contains four fields: 'Name (past tense)' with the value 'Opened patient details', 'Name (present tense)' with the value 'Open patient details', 'Action Description' with the value 'Opens the patient details from the digital rounds page.', and 'Quick view template' with a dropdown menu showing 'Patient View'. At the bottom right are 'CANCEL' and 'CREATE' buttons.

2. Enter the names of the quick view action in the **Name (past tense)** and **Name (present tense)** fields.
3. Select the quick view template from the drop-down list in the **Quick view template** field.
4. Click **Create**. Conductor adds the new quick view action to the table of existing quick view actions.

Update a quick view action

You can update an existing quick view action. To do this:

1. In the table of existing quick view actions, click the name of the quick view action that you want to update. The **Update Quick View Action** window displays.



A screenshot of the 'Update Quick View Action' form. It has a title bar with a close button (X). The form contains four fields: 'Name (past tense)' with the value 'Opened patient details', 'Name (present tense)' with the value 'Open patient details', 'Action Description' with the value 'Opens the patient details from the digital rounds page.', and 'Quick view template' with a dropdown menu showing 'Patient View'. At the bottom right are 'CANCEL' and 'UPDATE' buttons.

2. Change the details of the quick view action, as required.
3. When you have finished updating the quick view action, click **Update** to save the changes.

Quick view templates

When a round facilitator conducts a digital round, the quick view template enables them to view details of each patient in a round.

The **Quick View Templates** page enables you to view existing quick view templates, create new quick view templates, and update existing ones.

To view the **Quick View Templates** page, click **Quick View Templates** in the **Digital Rounding** menu. The **Quick View Templates** page displays a table of the existing quick view templates.

Name

CREATE NEW

Name	Options
Patient Experience	CANCEL
Patient View	CANCEL
Patient View EQA	CANCEL
View Task Collection	CANCEL

Showing 1 to 4 of 4 entries

First
Previous
1
Next
Last

To search for a specific template, enter text in the **Name** field. As you type, Conductor displays quick view templates that match the entered text.

If you have more than one page of quick view templates, you can use the following options:

- **First** - Click to display the first page of quick view templates.
- **Previous** - Click to display the previous page of quick view templates.
- **[Number]** - Click on a number to display that page of quick view templates.
- **Next** - Click to display the next page of quick view templates.
- **Last** - Click to display the last page of quick view templates.

You can cancel a quick view template by clicking **Cancel**. This removes the quick view template from the table of quick view templates.

Create a quick view template

The quick view template builder is a powerful tool that enables you to use building blocks or widgets to create a quick view template.

You must create a quick view template so that the round facilitator can view the details of each patient on the round.

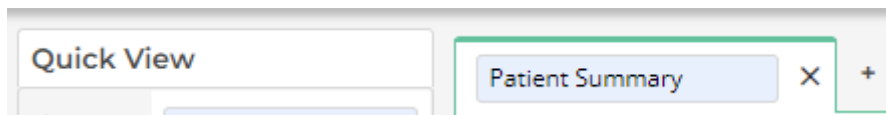
To create a new quick view template:

1. Click **Create New** in the top right corner of the **Quick View Templates** page. The **Quick View Template Builder** page displays with a list of predefined widgets on the left side of the page.

The screenshot shows the 'Quick View Template Builder' interface. On the left, the 'Quick View' section has a 'Name' field with 'Patient Summary' and a 'Context' dropdown with 'Round' selected. Below this is a 'Select Widget' panel with buttons for '+ Action', '+ Content', '+ Anticipated Date of Discharge (ADOD)', '+ Task Collection', '+ Orders', '+ Single Task Collection', and '+ Checkbox'. The main workspace shows a 'Patient Summary' tab with two widgets: '- Anticipated Date of Discharge (ADOD)' and '- Checkbox'. The 'Anticipated Date of Discharge (ADOD)' widget has 'Span columns' set to 1 and 'Enable Delay Reason' checked. The 'Checkbox' widget has 'Span columns' set to 2 and 'Type' set to 'Core roles'. A third widget, '- Content', is added below, with 'Span columns' set to 3 and a content area containing HTML-like placeholders: `<h2><p>MRN: {{activity.patient.medicalRecordNumber}}</p><p>Patient: {{activity.patient.name}}</p><p>Gender:`. At the bottom right, there are 'CANCEL' and 'CREATE' buttons.

2. Enter the name of the quick view template in the **Name** field.
3. Select **Round** from the drop-down list in the **Context** field. The context depends on the worklist that launches the quick view and the entity ID that the worklist passes to the quick view. In this case, the worklist displays a list of patients in a digital round and supplies a round ID to the quick view.
4. Enter the name of the quick view template tab.

5. You can now perform the following actions to build the quick view template:
 - Click **+ Add row** to create an extra row in the quick view template.
 - Drag and drop widgets from the list on the left side of the page into the quick view template.
 - Move widgets around within the quick view template.
6. When you drag and drop a widget into the quick view template, it expands to display one or more fields relevant to that widget. The quick view template is divided into three columns. All widgets have a **Span columns** field which enables you to define whether the widget fills the column you have dragged it to or whether it spans two or three columns. Complete the fields for each widget.
7. You can add more tabs to the quick view template. Click **+** next to the name of the first tab, enter a name for the new tab, and design the tab by adding rows, dragging and dropping widgets into it, and moving them around.



8. When you have created all the tabs in the quick view template, click **Create**. Conductor adds the new quick view template to the table of existing quick view templates.

You can now test how your quick view template works.

Test a quick view template

You can test a quick view template to see what it looks like. To do this:

1. Select **Quick View Test Page** in the **Digital Rounding** menu. The **Quick View Test** page displays.

2. Select the quick view template that you want to test from the drop-down list.

- Enter an encounter ID and a round ID and click **Render**. The quick view template displays so that you can see whether it is correct.

Quick View Test

* Quick View: Patient View

Activity ID:

Encounter ID: 1

Round ID: 100

RENDER

Summary Tasks Orders

MRN:

Patient:

Room #:

Bed #:

Gender: Unspecified

DOB: Jun 25, 2024

Age: 0 years

Unit:

Primary Payer:

Secondary Payer: N/A

No Avoidable Days

Patient Status:

DRG: No DRG

Principal Diagnosis:

Active Problems:

ADOD
Apr 30, 2024

Patient Not Seen

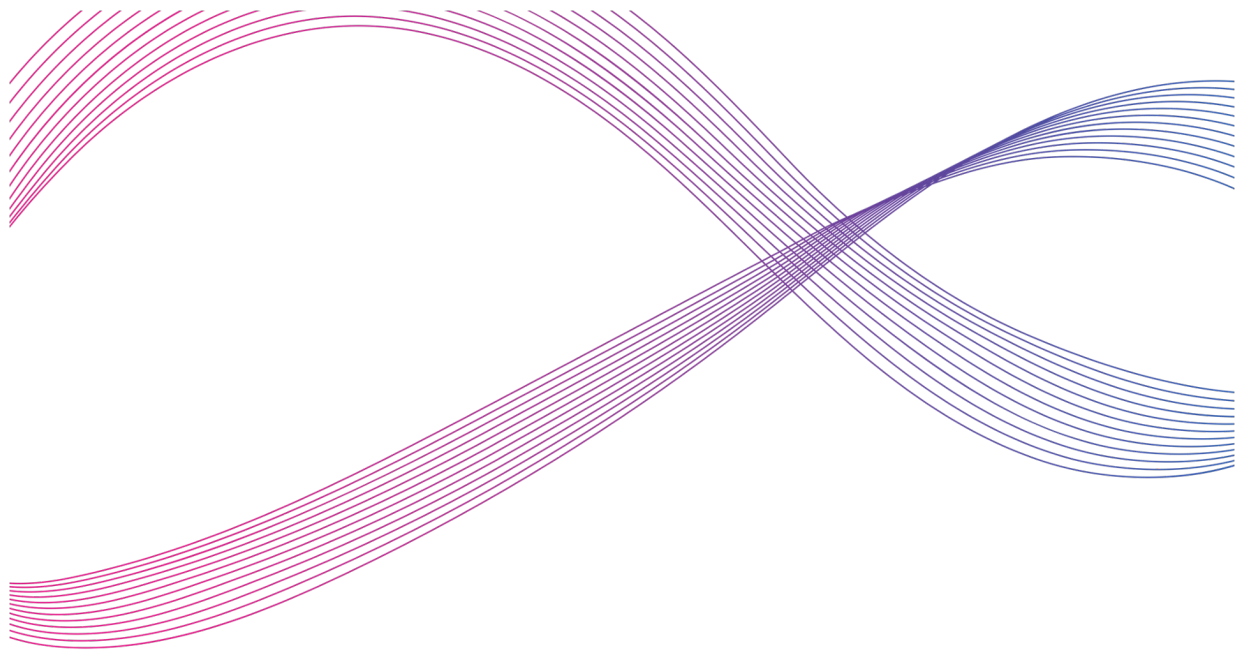
Complete Patient Round

You can update the quick view template if you want to make changes to it.

Update a quick view template

You can update an existing quick view template. To do this:

- In the table of existing quick view templates, click the name of the quick view template that you want to update. The **Quick View Template Builder** page displays.
- Change the details of the quick view template, as required.
- When you have finished updating the quick view template, click **Update** to save the changes.



Digital Rounds 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 digital rounds.

The digital rounds feature enables care team collaboration and communication leveraging digital tools and background automation. You can use it in the interdisciplinary rounds process to manage updates to the anticipated date of discharge, track action items, and automatically route tasks in the EHR to appropriate team members.

As a round facilitator, digital rounds enable you to create a round of patients and enter the details for each patient as you and your colleagues visit the patients on the round.

As an auditor, digital rounds enable you to perform an audit of a round and enter the audit information about each patient using a round audit form.

Purpose

The purpose of this document is to describe how to:

1. Start a digital round - see [Start a round \(page 4\)](#).
2. Conduct a round - see [Conduct a round \(page 5\)](#).
3. Pause a round - see [Pause a round \(page 17\)](#).
4. Rejoin a round - see [Rejoin a round \(page 18\)](#).
5. End a round - see [End a round \(page 18\)](#).
6. Audit a round - see [Audit a round \(page 20\)](#).

Round facilitator

A round facilitator can create a round of patients and update the tasks and anticipated date of discharge for each patient discussed.

As a round facilitator, you can perform the following actions:

- [Start a round \(page 4\)](#)
- [Conduct a round \(page 5\)](#)
- [Pause a round \(page 17\)](#)
- [Rejoin a round \(page 18\)](#)
- [End a round \(page 18\)](#)

Start a round

As a round facilitator, you can start a digital round. Conductor has a powerful search mechanism that enables digital rounds to be based on different criteria, such as all the patients on a particular unit, or all patients whose anticipated date of discharge is in the next two days.

To start a round:

1. Click **Start a round** in the top menu bar. The **Digital Rounds** page displays. There is a **Start A Round** form at the top and table of rounds in progress below.
2. In the **Start A Round** form, select the round that you want to start from the drop-down list.

Start A Round	
Select round	Floor 3, Oncology, Lumeon Hospital ▼
Round facilitator	Kim Westminster ▼
Confirm core roles	☒ Attending Provider ☒ Case Manager ☒ Charge Nurse
Confirm ancillary roles	☐ Nutrition ☐ Occupational Therapy ☐ Palliative Care ☐ Pharmacy
Other ancillary roles	Add other ancillary roles ▼
Start Round	

3. Select the core roles of the personnel on the round. Core roles are personnel who attend every round of this type.
4. Select the ancillary roles of the personnel on the round. Ancillary roles are personnel who attend the round if needed.
5. Select other ancillary roles from the drop-down list, if required. Other ancillary roles enables you to find participants who rarely attend this type of round but you need to add for this particular round.
6. Click **Start Round**. The **Digital Round** page displays with a list of the patients who have been automatically identified to be included in the round.

Conduct a round

When you have started the round, you can see the **Digital Round** page. This displays a list of the patients in the round. The columns in the list are configurable for each type of digital round so the information displayed for the patients may vary.

Round Name: Floor 7, Cardiology, Lumeon Hospital

Lead: Kim Westminster

Attendees (4): Attending Provider, Case Manager, Charge Nurse, Social Worker

Digital Rounds - Floor 7, Cardiology, Lumeon Hospital (Top 20)

Refresh Download

Showing 9 result(s)

	Room	Bed	Name	Attending Provider	Beside Nurse	Patient Class	EDD	Principal Problem	Current LOS	Expected LOS	Primary Payer	View Patient	Review
⊞	1	1	Aaron Williams	Dr. Jane Smith	Will James, RN	Inpatient	09/06/2023	Heart Failure	165 days	97 days	Medicare	View Patient	Patient Seen
⊞	1	1	Daniel King	Dr. Jane Smith	Will James, RN	Inpatient	09/06/2023	Heart Failure	165 days	97 days	Medicare	View Patient	Patient Seen
⊞	1	2	John Kelly	Dr. Jane Smith	Will James, RN	Inpatient	06/05/2023	Heart Failure	168 days	7 days	Medicare	View Patient	Patient Seen
⊞	2	1	Jane Kennedy	Dr. Jane Smith	Will James, RN	Inpatient	06/07/2023	Heart Failure	165 days	6 days	Medicare	View Patient	Patient Seen
⊞	2	2	Sophie Knight	Dr. Jane Smith	Will James, RN	Inpatient	06/04/2023	Heart Failure	167 days	5 days	Medicare	View Patient	Patient Seen
⊞	3	1	Sally Kite	Dr. Jane Smith	Will James, RN	Inpatient	09/08/2023	Heart Failure	169 days	103 days	Medicare	View Patient	Patient Seen
⊞	3	2	Jill Kuoi	Dr. Jane Smith	Will James, RN	Inpatient	06/11/2023	Heart Failure	172 days	17 days	Medicare	View Patient	Patient Seen
⊞	4	1	Jake Keen	Dr. Jane Smith	Will James, RN	Inpatient	06/12/2023	Heart Failure	175 days	21 days	Medicare	View Patient	Patient Seen
⊞	4	2	Jonathon Khoa	Dr. Jane Smith	Will James, RN	Inpatient	06/11/2023	Heart Failure	168 days	13 days	Medicare	View Patient	Patient Seen

Pause Round

End Round

The actions on this page are also configurable. You may have the following options that you can click:

-  on the far left of a patient row to display details of the patient's journey on their pathway - see [Patient pathway details \(page 6\)](#).
- **View Patient** in a patient row to view the details of the patient - see [View a patient's details \(page 6\)](#).
- **Patient Seen** in a patient row to mark that patient as seen.
- **Pause Round** below the table to pause the round and then restart the round later - see [Pause a round \(page 17\)](#).
- **End Round** below the table to finish the round when you have visited all the patients in the round - see [End a round \(page 18\)](#).
- **Refresh** in the top right of the table heading to ensure the page shows any updates for the round, such as a newly admitted patient that should be included in the round.
- **Download** in the top right of the table heading to download a CSV file of the digital round.

Patient pathway details

Clicking on a patient row in the **Digital Round** page displays the pathway details for the patient. This page is configurable so you may not see the same information as shown below.

☐	3103	01	Garethobf Olsonobf	Shaun Duran	Mairead Soper	Inpatient	PNEUMONIA	N/A	11 days	N/A	No GMLOS	MEDICARE PART A	Patient Detail	☐ Discussion Complete?
Created	User	Provider	Location	Activity	Description									
12/19/2023, 1:08 AM	emma			Discharge Planning (12/07/2023, 8:37 PM) [2221]	Pathway state changed from "Discharge Planning - Hold 30 secs" [3] to "Discharge Planning - Hold Until Encounter Updated (Record EDD/LOS)" [4] via transition [10]									
12/19/2023, 12:52 AM	emma			Discharge Planning (12/07/2023, 8:37 PM) [2221]	Pathway state changed from "Discharge Planning - Midnight - Create 'Follow up Obs/ IP status' Task" [7] to "Discharge Planning - Hold 30 secs" [3] via transition [14]									
12/19/2023, 12:52 AM	emma			Discharge Planning (12/07/2023, 8:37 PM) [2221]	Pathway state changed from "Discharge Planning - Hold Until Encounter Updated (Record EDD/LOS)" [4] to "Discharge Planning - Midnight - Create 'Follow up Obs/ IP status' Task" [7] via transition [3]									
12/19/2023, 12:52 AM	emma			Discharge Planning (12/07/2023, 8:37 PM) [2221]	Pathway state changed from "Discharge Planning - Hold 30 secs" [3] to "Discharge Planning - Hold Until Encounter Updated (Record EDD/LOS)" [4] via transition [10]									
12/19/2023, 12:36 AM	emma			Discharge Planning (12/07/2023, 8:37 PM) [2221]	Pathway state changed from "Discharge Planning - Midnight - Create 'Follow up Obs/ IP status' Task" [7] to "Discharge Planning - Hold 30 secs" [3] via transition [14]									

You can use the scroll bar to scroll through the states of the pathway that the patient has gone through.

Click ☐ to close the patient pathway details.

View a patient's details

When you are conducting a round, you can click **View patient** to display more information about the patient. The tabs on the **Patient View** window may include:

- **Summary** - see [Summary \(page 7\)](#).
- **Tasks** - Collections of related tasks that can be assigned to a patient. For example, there may be tasks associated with a patient's discharge, such as discharge readiness. See [Tasks \(page 10\)](#).
- **Orders** - Displays the orders have been arranged for the patient via the EMR, and their status - see [Orders \(page 15\)](#).
- **Patient Experience** - Displays the overall patient experience based on metrics captured from the patient experience form. This is an optional tab that may or may not display based on your organization's settings. See [Patient experience \(page 16\)](#).

Summary

The **Summary** tab displays general information about the patient, such as the patient's name, age, and date of birth (DOB), the anticipated date of discharge (ADOD), staff who have been involved in the patient's care journey, and diagnoses.

Patient View
×

Summary
Tasks
Orders
Patient Experience

MRN: L20202
Patient: Jake Keen
Gender: M
DOB: 05/11/1984
Age: 39 years


ADOD
Nov 15, 2023

Principle Problem: Heart Failure
Date of Diagnosis: Feb 07, 2023
Admission Date: May 22, 2023

Active Problems
- COPD
- Hypertension
- TIA

Core roles:

☒ Charge Nurse
☒ Attending Provider
☒ Case Manager
☒ Social Worker
☐ Bedside Nurse
☐ Consultant

Whiteboard

Complete Patient Round

On the **Summary** tab, you can:

Change the anticipated date of discharge (ADOD)

When discussing a patient on a round, you can change their anticipated date and time of discharge (ADOD).

When you enter a new ADOD, you may be able to provide a reason for the change, depending on your organization's configuration. If it is available, you can select a reason for delaying their discharge date from the drop-down list.

To change the ADOD:

1. Click the calendar icon next to ADOD to display the **Update Anticipated Date of Discharge (ADOD)** window. The table displays previous ADOD dates and times, the user or system that changed it, and the date and time that it was changed.

✕

New ADOD

11/17/2023
...

12:00
🕒

User	Date And Time	Anticipated Date Of Discharge
Kim Westminster	Nov 14, 2023 10:08	15/11/2023, 00:00
	Jun 2, 2023 05:31	19/05/2023, 10:30

Cancel

Save

2. Click in the **New ADOD** field to display a calendar. Select the new ADOD date.
3. Click the clock icon in the **ADOD Time** field and scroll the hours and minutes to select the new ADOD time.
4. If available, select a reason for the change from the drop-down list.
5. Click **Save** to update the ADOD.

View a whiteboard

You may be able to view a whiteboard, depending on your organization's configuration. If it is available, click **Whiteboard** to display a whiteboard for the patient. This window enables you to view notes for the patient and add new ones.

The notes available on the whiteboard depend on your organization's configuration. An example of a whiteboard is shown below:

The screenshot shows a 'Whiteboard' window for patient Jake Keen (MRN L20202, DOB 1984-05-11, 39 years). The whiteboard is organized into several sections, each with a text input field and a '0 responses' indicator:

- Active Problems:** Contains the text 'Hypertension'.
- Barriers to Discharge:** An empty text input field.
- Daily Goals:** An empty text input field.
- Occupational Therapy Notes:** Contains the text 'Arrange fit for discharge assessment'.
- Pharmacy Notes:** An empty text input field.

You may be able to add the following notes:

- Active problems
- Barriers to discharge
- Daily goals
- Occupational therapy notes
- Pharmacy notes
- Physiotherapy notes
- Social worker notes
- Speech therapy notes

Complete the fields in the form as required and click **Submit** to save your entries.

Complete the patient round

When you have viewed and updated the patient details, click **Complete Patient Round** to close the **Patient View** window for this patient. This marks the patient as **Patient Seen** on the **Digital Round** page.

Patient not seen

If, for any reason, the patient was not seen or not discussed during the round, you may be able to mark them as not seen, depending on your organization's configuration. If this option is available, you can click **Patient Not Seen**. This closes the **Patient View** window for this patient.

Tasks

The **Tasks** tab displays the task collections for this patient. Task collections are also known as task libraries. Task collections can be set up to include tasks that are automatically added when the task collection is assigned to the patient. They can also include optional tasks which the round facilitator can add for the patient.

The screenshot displays the 'Patient View' window with the 'Tasks' tab selected. The window has a blue header with a close button (X). Below the header are four tabs: 'Summary', 'Tasks', 'Orders', and 'Patient Experience'. The 'Tasks' tab content includes a list of task collections, each with a colored status bar, a task count link, and an 'Add Tasks' button. The collections are: Diagnostic Readiness (Red, Task (2)), Imaging Readiness (Red, Task (1)), Patient/Family Readiness (Green, Task (0)), Home Services (Green, Task (0)), and Respiratory Therapy (Green, Task (0)). Below this list is a 'Select Task Library' section with a dropdown menu and an 'Add Task Library' button. At the bottom right of the window is a blue button labeled 'Complete Patient Round'.

Task collections can be highlighted in:

- **Red** - if one or more tasks in the collection are overdue.
- **Amber** - if tasks in the collection are open but no tasks are past their due date and time.
- **Green** - if all tasks in the collection are complete.

On the **Tasks** tab, you can:

Add task libraries

You can select additional task libraries and add them for the patient. To do this, select a task library from the drop-down list in the **Select Task Library** field and click **Add Task Library**. The task library is added to the list of task libraries for the patient.

View the tasks in each task collection

Click the task label next to the task collection to display the individual tasks within the task collection. For example, click **Task (2)** to display the tasks in the **Diagnostic Readiness** task collection.

Patient View

Summary

Tasks

Orders

Patient Experience

Diagnostic Readiness

Task (2)

Add Tasks

Due Date	Task Type	Status	Assignee	Progress Notes
06/26/2023, 5:00 PM	Completion of diagnostic order	Not started	Bedside Nurse	N/A
06/26/2023, 5:00 PM	Completion of diagnostic order	Not started	Bedside Nurse	N/A

Imaging Readiness

Patient/Family Readiness

Home Services

Respiratory Therapy

Task (1)

Task (0)

Task (0)

Task (0)

Add Tasks

Add Tasks

Add Tasks

Add Tasks

Add a task to a task collection

The pathway automatically adds tasks to each task library. You can manually add a task to a library, in addition to the ones that are automatically added. To do this:

1. Click **Add Tasks** next to the task collection to display the **Create Task** window. This window is configurable so you may see different fields.

Create Task ✕

Task Type

Prioritize diagnostic order for disc... ✕ ▼

Due date

11 / 14 / 2023 at 17 : 00

Priority

High ▼

Status

Not started ▼

Assign to type

Care Team ▼

Assign to (role)

Bedside Nurse ▼

Detail

Please discuss with diagnostic department
prioritization of following [xxxx] diagnostic order
for {{patient.name}} in order to facilitate timely

Instructions

Cancel

Create

2. Select the task that you want to add from the drop-down list in the **Task Type** field.
3. The default due date and time for the task has been preset. For example, the date may be today and the time may be four hours ahead of your current time. Change the due date and time as required.

4. Select the priority from the drop-down list in the **Priority** field. You can choose **High**, **Normal**, or **Low**.
5. Select the status from the drop-down list in the **Status** field. You can choose **Completed**, **In progress**, or **Not started**.
6. Select whether you want to assign the task to a **Care Team** or a **User/Task Queue** from the drop-down list in the **Assign to type** field.
7. If you selected a care team in the previous step, select the role that you want to assign the task to. The care teams displayed here depends on your organization's configuration and EHR mappings.

The screenshot shows a form with the following fields and options:

- Assign to type:** Care Team (selected)
- Assign to (role):** Bedside Nurse (selected, dropdown menu is open showing options: Bedside Nurse, Attending Provider, Bedside Nurse, Care Coordinator, Case Manager, Chaplain, Charge Nurse)
- Detail:** (empty field)
- Instructions:** (empty field)
- Create:** (button)

If you selected a user/task queue, start typing the name of the user that you want to assign the task to and select the required user from the drop-down list. The user roles displayed here depends on your organization's configuration and EHR mappings.

The screenshot shows a form with the following fields and options:

- Assign to type:** User/Task Queue (selected)
- Assign to (user):** Mr Robert Smith (selected, dropdown menu is open showing search results for 'sm')
- Detail:** (empty field)
- Create:** (button)

8. The default detail defined for this task displays in the **Detail** field. You can change or update this, if required. If there are any instructions defined for this task, they display in the **Instructions** field but you cannot change them.
9. Click **Create** to add the task to the task collection for the patient.

Usually, when you create a new task during a digital round, Conductor generates a task in the EHR. When the task is updated or closed in the EHR, Conductor reflects those changes.

Display and update task details

You can view a task in a task library and perform a number of updates to it. To do this:

1. Click the task type name to display details of the individual task.

Follow up Obs/ IP status
✕

Assign To Me
Reassign...
Add Note...
Close...

Assigned ToCase Manager

InitiatorRound Facilitator Skye Southwark

Subject *Follow up Obs/ IP status

PatientM VanessaObf LexieObf

Location

Due date *12/19/2023
at 18 : 58

PriorityNormal

Detail *Follow up on patient status per appropriate clinical guidelines.

Task CollectionCase Management - Follow up Obs/ IP Stati

CancelUpdate

Logs

Date	Note
12/19/2023, 2:58 PM	Round Facilitator Skye Southwark Task Created

2. You can take the following actions by clicking the buttons:
 - **Assign to Me** - Click to assign the task to yourself.
 - **Reassign** - Reassigns the task to a different person. Click to display the **Assign To** field, start typing the name of the role that you want to assign the task to and select the role from the drop-down list. Then click **Reassign** to assign the task to the selected role.
 - **Add Note** - Click to display the **Note** field so that you can add a note to the task.
 - **Close** - Closes the task once it has been completed. Click to display the **Reason** and **Notes** fields. Select the reason from the drop-down list and add a note, if required. Then click **Close** to close this task. You can reopen the task by clicking **Reopen** if you have closed it by mistake.
3. You can change some of the details of the task, for example, the subject, location, due date, or priority.
4. If you have changed any of the details of the task, click **Update** to update the task with these changes and close the task window. Otherwise, click **Cancel** to close the task window.

Complete the patient round

When you have viewed and updated the patient details, click **Complete Patient Round** to close the **Patient View** window for this patient. This marks the patient as **Patient Seen** on the **Digital Round** page.

Patient not seen

If, for any reason, the patient was not seen or not discussed during the round, you may be able to mark them as not seen, depending on your organization's configuration. If this option is available, you can click **Patient Not Seen**. This closes the **Patient View** window for this patient.

Orders

The **Orders** tab displays the orders that have been placed in the external EHR for this patient's encounter. For each order, it displays the order date, order ID, a description, and its status.

If, during a digital round, a participant wants an order put in place, you can use this tab to see whether it has already been ordered. You can then use the **Tasks** tab to create a new task for the new order or check on the status of the order, if it already exists. For example, if a provider orders a chest x-ray, you can check whether it has already been ordered and create a task on the **Tasks** tab to check on its status. If the chest x-ray has not been ordered, you create a new task on the **Tasks** tab to order the x-ray.

Patient View ×			
Summary	Tasks	Orders	Patient Experience

Order Date	Order ID	Description	Status
05/15/2023	EPIC : proc_L10101E	Procedure description	In Progress

Complete the patient round

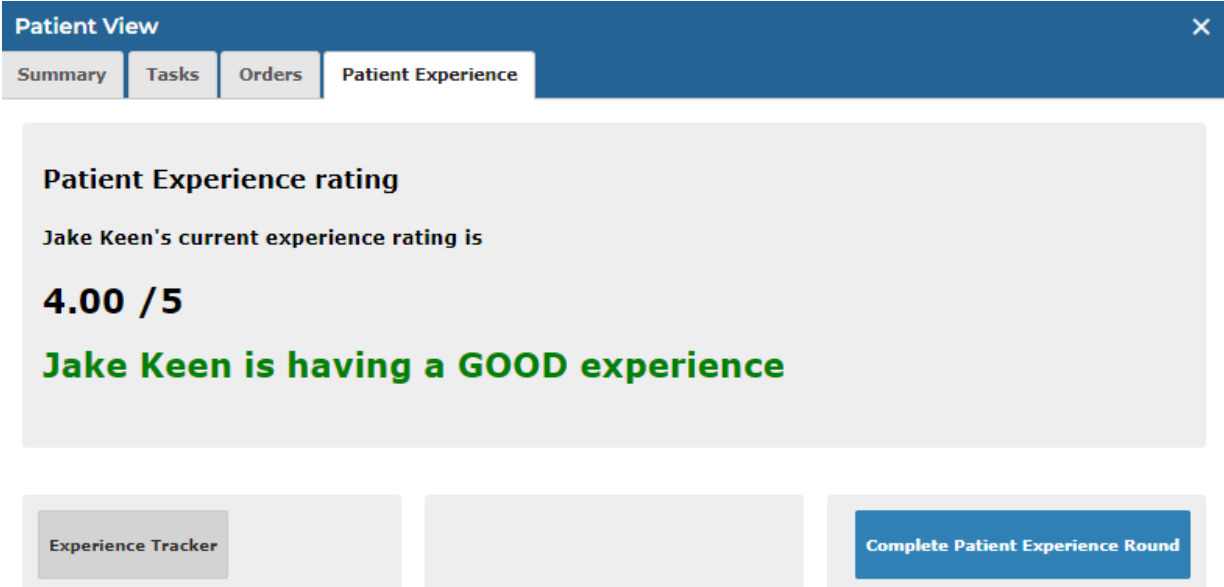
When you have viewed and updated the patient details, click **Complete Patient Round** to close the **Patient View** window for this patient. This marks the patient as **Patient Seen** on the **Digital Round** page.

Patient not seen

If, for any reason, the patient was not seen or not discussed during the round, you may be able to mark them as not seen, depending on your organization's configuration. If this option is available, you can click **Patient Not Seen**. This closes the **Patient View** window for this patient.

Patient experience

The **Patient Experience** tab displays the ratings that the patient has given for their experience of a digital round.



Patient View [X]

Summary Tasks Orders **Patient Experience**

Patient Experience rating

Jake Keen's current experience rating is

4.00 / 5

Jake Keen is having a GOOD experience

Experience Tracker [] **Complete Patient Experience Round**

On the **Patient Experience** tab, you can:

View the experience tracker

You can use the experience tracker to update the patient's experience rating and to view historical ratings that the patient has given.

Click **Experience Tracker** to display the **Patient Experience** window.

To update the patient's experience rating, select the rating from the drop-down list in answer to the question. Then click **Submit** to save the patient's new experience rating and close the window.

You can click on the responses drop-down arrow to display previous patient responses.

2 responses ^

11/15/2023, 7:38 AM	5 - Great
11/14/2023, 10:32 AM	4 - Fine

Click **Submit** to close the experience tracker for the patient.

Complete the patient round

When you have viewed and updated the patient details, click **Complete Patient Round** to close the **Patient View** window for this patient. This marks the patient as **Patient Seen** on the **Digital Round** page.

Patient not seen

If, for any reason, the patient was not seen or not discussed during the round, you may be able to mark them as not seen, depending on your organization's configuration. If this option is available, you can click **Patient Not Seen**. This closes the **Patient View** window for this patient.

Pause a round

You can pause a round if for any reason you cannot continue.

To do this, click **Pause Round** on the **Digital Round** page.

Round Name: Floor 7, Cardiology, Lumeon Hospital

Lead: Kim Westminster

Attendees (4): Attending Provider, Case Manager, Charge Nurse, Social Worker

Digital Rounds - Floor 7, Cardiology, Lumeon Hospital (Top 20)

Refresh Download

Showing 9 result(s)

	Room	Bed	Name	Attending Provider	Bedside Nurse	Patient Class	EDD	Principal Problem	Current LOS	Expected LOS	Primary Payer	View Patient	Review
⊞	1	1	Aaron Williams	Dr. Jane Smith	Will James, RN	Inpatient	09/06/2023	Heart Failure	165 days	97 days	Medicare	View Patient	Patient Seen
⊞	1	1	Daniel King	Dr. Jane Smith	Will James, RN	Inpatient	09/06/2023	Heart Failure	165 days	97 days	Medicare	View Patient	Patient Seen
⊞	1	2	John Kelly	Dr. Jane Smith	Will James, RN	Inpatient	06/05/2023	Heart Failure	168 days	7 days	Medicare	View Patient	Patient Seen
⊞	2	1	Jane Kennedy	Dr. Jane Smith	Will James, RN	Inpatient	06/07/2023	Heart Failure	165 days	6 days	Medicare	View Patient	Patient Seen
⊞	2	2	Sophie Knight	Dr. Jane Smith	Will James, RN	Inpatient	06/04/2023	Heart Failure	167 days	5 days	Medicare	View Patient	Patient Seen
⊞	3	1	Sally Kite	Dr. Jane Smith	Will James, RN	Inpatient	09/08/2023	Heart Failure	169 days	103 days	Medicare	View Patient	Patient Seen
⊞	3	2	Jill Kuoi	Dr. Jane Smith	Will James, RN	Inpatient	06/11/2023	Heart Failure	172 days	17 days	Medicare	View Patient	Patient Seen
⊞	4	1	Jake Keen	Dr. Jane Smith	Will James, RN	Inpatient	06/12/2023	Heart Failure	175 days	21 days	Medicare	View Patient	Patient Seen
⊞	4	2	Jonathon Khoa	Dr. Jane Smith	Will James, RN	Inpatient	06/11/2023	Heart Failure	168 days	13 days	Medicare	View Patient	Patient Seen

Pause Round

End Round

A message displays asking if you are sure you want to pause the round. Click **Yes** to pause the round or **No** if you want to continue with the round.

When you pause a round, Conductor saves all the updates you have made to the digital round so far. The digital round appears in the table of rounds in progress.

After you have paused a round, you can join it again at any time.

Rejoin a round

You can rejoin a round at any time. For example, if you want to join it after the round facilitator has already started it. Also, if someone has paused a round, you can join it again.

To rejoin a round:

1. Search for the round that you want to rejoin in the table of rounds in progress. To find the round, you can enter part of the round name in the **Round Name** field. As you type, Conductor displays rounds that match the text you have entered.

Rounds In Progress

Round Name

Round Name	Round Facilitator	Start Date	Start Time	Options
Floor 3, Oncology, Lumeon Hospital	Kim Westminster	11/14/2023	09:28:39	Rejoin Round

Showing 1 to 1 of 1 entries (filtered from 119 total entries)

[First](#) [Previous](#) [1](#) [Next](#) [Last](#)

2. Click **Rejoin Round** on the row of the round that you want to restart. The **Digital Round** page displays with details of all the patients in the round and you can continue to conduct the digital round.

You can pause and rejoin rounds as many times as necessary.

End a round

When you have finished your discussions for the patient round, click **End Round** to end it. A confirmation message displays. Click **Yes** to confirm that you want to end the round or click **No** to return to the round.

Round auditor

Round auditors can join a digital round and fill in a round audit form while they observe the round. This enables your organization to compile data on how the round was conducted and establish whether improvements can be made.

View round audits

When you log in as a round auditor, the **Round Audits** page displays.

You can filter the round audits you want to display using the following fields:

- **Date** - Enter a date, or click on the calendar icon to select a date, to display digital rounds that were performed on that date. Displays rounds for all dates if you do not select a specific date.
- **Round Name** - Select a round name from the drop-down list to display rounds with that name. Displays all rounds if you do not select a specific round name.
- **Round Facilitator** - Select a round facilitator from the drop-down list to display rounds that were facilitated by that person. Defaults to your user name until you select a specific round facilitator. You can also select **Show All** to display rounds for all facilitators.
- **Round Status** - Select **In Progress** or **Completed** from the drop-down list if you want to display digital rounds with that status only. Displays round of all statuses if you select a specific status.

When you have selected the appropriate filters, the round audits that meet your selection criteria display.

Round Audits

Date

Round Name

Round Facilitator

Round Status

mm/dd/yyyy  

Show All

Skye Southwark

Show All

Select round to audit

Date	Start Time	Round Name	Round Facilitator	Round Status	Audit End Time	Options
01/08/2024	11:15	EMMC, P6	Southwark, Skye	In Progress		EDIT AUDIT
12/21/2023	11:43	Mercy, M3F Medical	Southwark, Skye	In Progress		START AUDIT
12/19/2023	12:24	Mercy, M3F Medical	Southwark, Skye	In Progress		START AUDIT

Showing 1 to 3 of 3 entries (filtered from 116 total entries)

[First](#)
[Previous](#)
[1](#)
[Next](#)
[Last](#)

If you have more than one page of round audits, you can use the following options:

- **First** - Click to display the first page of round audits.
- **Previous** - Click to display the previous page of round audits.
- **[Number]** - Click on a number to display that page of round audits.

- **Next** - Click to display the next page of round audits.
- **Last** - Click to display the last page of round audits.

Audit a round

When you have displayed the round audits, you can start an audit or you can edit an audit for a round when you have started the audit earlier.

To audit a round:

1. Click **Start Audit** on the round that you want to audit. The **Round Audit** page displays. The number of sections and the format of the round audit form depends on how it has been configured. For example, the round audit form may have a final section so that you can enter some general information about the digital round.

Regardless of whether there is a general section, the round audit form always has a section for each patient on the round.

The round audit displays the patient number that you are viewing and the total number of patients in the round audit.

Round Audit | EMMC, P6 | Started 01/08/2024 at 11:15 AM

Viewing patient 1 of 35 | * Indicates required

Patient *

1. Plan, Course of Care and Barriers

Tips: Disciplines should discuss plans for the day & the stay; goals and barriers are often related

* Care team identified and established daily goals, care plan, and barriers to progression for patient?

☒ Yes ☐ No

2. Follow-up Items

Tips: If applicable, follow-ups should be documented in tool, assigned to an individual, and facilitator should follow-up on progress of outstanding items previous rounds

* Care team identified, assigned, and communicated follow-up items and address items from previous day's briefing, including escalations as needed for patient?

☒ Yes ☐ No

3. Expected Discharge Date (EDD)

Tips: Each patient should be assigned an EDD (or ETD, as applicable). If team cannot decide, guide team alignment to most likely date based on patient outcome goals

* Care team discussed expected discharge date for patient?

☒ Yes ☐ No

2. You can:

- Enter the details for this section and click **Next** at the bottom of the form. You must complete any mandatory questions before you can proceed to the next section.
- If it is a section for a patient, click **Skip Patient** if this patient was not seen during the digital round. A confirmation message displays. Click **OK** to skip the patient or **Cancel** to return to the section for the patient. If you click **OK** to skip the patient, any information you have entered in this section is not saved.
- If it is not the first section in the audit, click **Previous** to return to the previous section. A confirmation message displays. Click **OK** to return to the section for the previous patient or **Cancel** to return to the section for the patient. If you click **OK** to return to the previous section, any information you have entered in this section is not saved.

The next section of the form displays.

3. When you have completed the final section of the form, you can:

- Click **Previous** to return to the previous section. A confirmation message displays. Click **OK** to return to the section for the previous patient or **Cancel** to return to the section for the patient. If you click **OK** to return to the previous section, any information you have entered in this section is not saved.
- Click **Save** to save the information you have entered in the round audit. The audit still appears in the table of round audits and you can edit it further.
- Click **End Audit** to complete the audit. The audit for this digital round is now complete.

View a completed round audit

You can view one of the completed round audits.

To do this, click **View Audit** on the round audit that you want to view. The **View Round Audit** page displays. This shows all the sections of the round audit, including any initial sections, a section for each patient in the round (regardless of whether they were skipped or not), and any final sections.

View Round Audit

Patient

1. Plan, Course of Care and Barriers

Tips: Disciplines should discuss plans for the day & the stay; goals and barriers are often related

* Care team identified and established daily goals, care plan, and barriers to progression for patient?

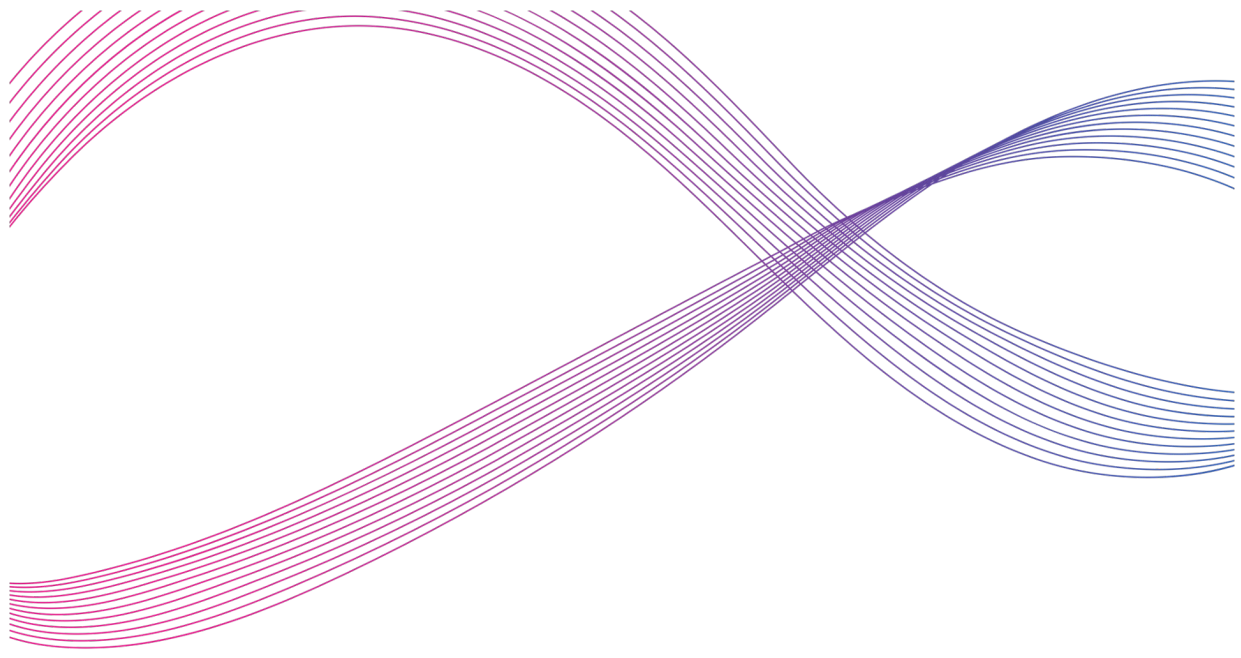
Submitted Date and Time	Response	Submitter
01/08/2024, 11:29:50 AM	Yes	Kim Westminster

2. Follow-up Items

Tips: If applicable, follow-ups should be documented in tool, assigned to an individual, and facilitator should follow-up on progress of outstanding items previous rounds

* Care team identified, assigned, and communicated follow-up items and address items from

When you have finished viewing the completed round audit, either click **X** in the top right corner or scroll to the bottom and click **Close View**.



HTML Template Management in Lumeon Conductor 24.2

Issued by: Lumeon Learning
Date of issue: August 2024

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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.

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.

OUI	Patient demographics Form Responses		Activity Template Persists across all case states in the pathway for that activity.
	Case State Template for case state = Initial Phone Call Introduce yourself. Obtain patient's commitment to keep the appointment. "Good morning (afternoon, evening), this is Janie, Dr. Welby's nurse, calling from Goodwill Clinic. I am calling to confirm your appointment. Blah, blah" "Good morning (afternoon, evening), this is		

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.

OUI	Patient demographics Form Responses		Activity Template Persists across all case states in the pathway for that activity.
	Case State Template for case state = Follow Up Phone Call Hello Mr./Ms. _____. I am [caller's name], a [type of clinician] from [name of hospital]. You may remember that when you left, the [hospital name] discharge educator, [DE name], mentioned you'd receive a call checking in on things. I am hoping to talk to you about your medical issues		

See **Pathways in Lumeon Conductor** for more information about pathways.

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:

Symptom Form

The following questions are specific to any issues or discomfort that you may have experienced during the past 24 hours.

During the past 24 hours have you experienced a fever of over 101 degrees?

☐ No

If so, what is the highest temperature that you recorded?

Have you tried treating this fever with acetaminophen or ibuprofen?

☐ Yes ☒ No ☐ Not Sure

During the past 24 hours, have you:

Had unexplained leg pain?

☐ Yes ☒ No ☐ Not Sure

Had pus, drainage or streaks from your incision?

☒ Yes ☐ No ☐ Not Sure

Patient Information

DEMOGRAPHIC

Name: WAT, Stu
DOB: January 01, 1980 (17 YO)
Gender: M

ENCOUNTER

Procedure Name: Hip/Knee Repair, Left Knee
Discharge Date: February 01, 2017
Location: City West Medical Practice
Current Status: Released

Patient self-assessment data

CALCULATED RISK SCORE 23

PATIENT RESPONSES

The data provided below was provided by the patient or guardian on February 03, 2017. All questions requested the patient to indicate their health response specifically to the last 24 hours. Weighted rows indicate that the specific response is a variance from your expected responses.

Highest Temperature recorded?	103
Have you been treating this fever with acetaminophen or ibuprofen?	No
Had unexplained leg pain?	Yes
Had pus, drainage or streaks from your incision?	No
Had your incision begin to pull apart?	Yes
Been able to urinate or have bowel movement?	No
Had bloody, very dark or "funky" colored movements?	Yes
Coughed up or vomited blood?	Yes
Had severe, unexplained or uncontrollable pain?	Yes
Had difficulty breathing?	Yes
Been unable to eat?	Yes
Had increasing weakness, or the ability to care for yourself?	Yes
Had the worst headache you've ever had?	Yes

Are there any other issues or discomfort you would like to share that we have not asked about above?

I haven't coughed up any blood but I have been coughing a lot.

Your Assessment

Observer:

HPI:

Concern Category:

Rationale for Concern:

Recommendation:

Action Taken:

Recommended Patient State/Action:

Risk:

Action Required No Later Than:

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.
- Providers informing them of test results for a patient.
- External providers 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.

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.

HTML template management

You can use the **HTML Template Management** page to view, edit, and activate existing templates, and create new templates.

- HTML Template Management

[Worklists](#) | [Diaries](#) | [Appointment Queue](#) | [Search Engine](#) | [Patient Search](#) | [Home](#) | [My Details](#) | [New Activity](#) | [Practitioner](#) | [Activity Search](#) | [Activity Manager](#) | [Config](#) |

Pathway Logic
[Pathways](#)
[Checkpoints](#)
[Pathway Functions](#)
[Activity Types](#)

Activity Operator Templates
Case State Operator Templates
Form Layouts Templates
Email Templates

HTML Template	Type	Company	Language	Status	
Select	Select	Default	Select	Active	New...

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.

Activity Operator Templates
Case State Operator Templates
Form Layouts Templates
Email Templates

HTML Template
Care Team Role
Language
Status

Select
Default
Select
Select
New...

Activity Operator Templates	Care Team Role	Language	Status	
Generic Activity Operator Template	Default, Referrer	af_ZA, en_GB	Pending	Activate Delete Clone
Generic Header 2 Template	Default	en_GB	Pending	Activate Delete Clone

Showing 1 to 2 of 2 entries
First
Previous
1
Next
Last

Case state operator templates

You can create case state operator templates and associate them with individual case states in pathways.

Activity Operator Templates
Case State Operator Templates
Form Layouts Templates
Email Templates

HTML Template
Care Team Role
Language
Status

Select
Default
Select
Select
New...

Case State Operator Templates	Care Team Role	Language	Status	
Activity Operator 2	Default	en_GB	Active	Archive Delete Clone
Activity Operator 2 - CLONE	Default	en_GB	Pending	Activate Delete Clone
Case State Operator Template	Default	en_GB	Active	Archive Delete Clone

Showing 1 to 3 of 3 entries
First
Previous
1
Next
Last

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.

Activity Operator Templates Case State Operator Templates Form Layouts Templates Email Templates						
HTML Template	Language	Status				
Select	Select	Select	New...			
Form Layouts Templates			Language	Status		
Contemporary Form			en_GB	Active	Archive	Delete Clone
DUMMY			de_DE, en_GB	Pending	Activate	Delete Clone
Generic Form Layout Template			en_GB	Pending	Activate	Delete Clone
Showing 1 to 3 of 3 entries			First Previous 1 Next Last			

Email templates

You can create email templates and use them to send emails to patients, providers, external providers, and other Conductor users.

Activity Operator Templates Case State Operator Templates Form Layouts Templates Email Templates								
HTML Template	Type	Company	Language	Status				
Select	Select	Default	Select	Select	New...			
Email Templates		Type	Company	Language	Status			
Access - Company		System	Default	en_GB	Active	Archive	Delete	Clone
Access - Employee		System	Default	en_GB	Active	Archive	Delete	Clone
Access - External Practitioner		System	Default	en_GB	Active	Archive	Delete	Clone
Access - Patient		System	Default	en_GB	Active	Archive	Delete	Clone
Account Locked - Company		System	Default	en_GB	Active	Archive	Delete	Clone

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.

Activity Operator TemplatesCase State Operator TemplatesForm Layouts TemplatesEmail Templates

HTML TemplateTypeCompanyLanguageStatus

SelectSelectDefaultfr_FRSelectNew...

Email Templates	Type	Company	Language	Status			
Appointment Create	System	Blue Harvest, Default, Lumeon Company	de_DE, en_GB, fr_FR	Active	Archive	Delete	Clone
Appointment Reschedule	System	BBC, Blue Harvest, Default	en_GB, fr_FR	Active	Archive	Delete	Clone
Class Booking	System	BBC, Blue Harvest, Default	en_GB, fr_FR	Active	Archive	Delete	Clone
Clinical Report Published	System	Blue Harvest, Default	en_GB, fr_FR	Active	Archive	Delete	Clone
Generic Appointment Create	Custom	BestHealth, Default	en_GB, fr_FR	Active	Archive	Delete	Clone

Showing 1 to 5 of 5 entries (filtered from 81 total entries)

FirstPrevious1NextLast

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**.

Activity Operator TemplatesCase State Operator TemplatesForm Layouts TemplatesEmail Templates

HTML Template

Care Team Role

Language

Status

Select

Default

Select

Select

New...

Activity Operator Templates	Care Team Role	Language	Status			
Generic Header 2 Template	Default	en_GB	Active	Archive	Delete	Clone
[PT] AT1	Default	en_GB	Active	Archive	Delete	Clone
Generic Activity Operator Template	Default, Primary Care Physician, Referrer	af_ZA, en_GB	Pending	Activate	Delete	Clone
Generic Activity Operator Template - CLONE	Default, Primary Care Physician, Referrer	af_ZA, en_GB	Archived	Activate	Delete	Clone
Check Address Activity Operator Template	Default	en_GB	Active	Archive	Delete	Clone
Test activity operator template	Default	en_GB	Pending	Activate	Delete	Clone
Generic Activity Operator Template	Default	af_ZA, en_GB	Pending	Activate	Delete	Clone
Generic Header 2 Template	Default	en_GB	Pending	Activate	Delete	Clone
Generic Header 2 Template	Default	en_GB	Pending	Activate	Delete	Clone
Activity Operator Template - Imported	Default	en_GB	Pending	Activate	Delete	Clone

Showing 1 to 10 of 10 entries

First

Previous

1

Next

Last

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**.

Activity Operator Templates Case State Operator Templates Form Layouts Templates Email Templates								
HTML Template	Type	Company	Language	Status	New...			
Select ▼	Select ▼	Default ▼	fr_FR ▼	Select ▼				
Email Templates	Type	Company	Language	Status				
Appointment Create	System	Blue Harvest, Default, Lumeon Company	de_DE, en_GB, fr_FR	Active	Archive	Delete	Clone	
Appointment Reschedule	System	BBC, Blue Harvest, Default	en_GB, fr_FR	Active	Archive	Delete	Clone	
Class Booking	System	BBC, Blue Harvest, Default	en_GB, fr_FR	Active	Archive	Delete	Clone	
Clinical Report Published	System	Blue Harvest, Default	en_GB, fr_FR	Active	Archive	Delete	Clone	
Generic Appointment Create	Custom	BestHealth, Default	en_GB, fr_FR	Active	Archive	Delete	Clone	

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.

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.

HTML Template	Type	Company	Language	Status	
Select ▼	Select ▼	Default ▼	fr_FR ▼	Select ▼	New...

4. Enter the name of the template.

Return to HTML Template Management Me | Tasks... | New...

Default

Create Activity Operator Templates

Import Create

Template name Check Address Activity Operator Template

1

Download Upload

Template CSS

1

Download Upload

HTML

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.

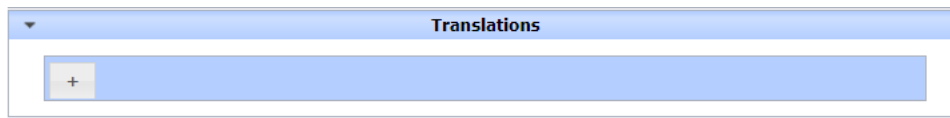


10. Find the new template in the list and click **Activate**. To make it easier to find the template, you can select **Pending** from the drop-down list in the **Status** field to display pending templates only. You cannot use the template until its status is **Active**.

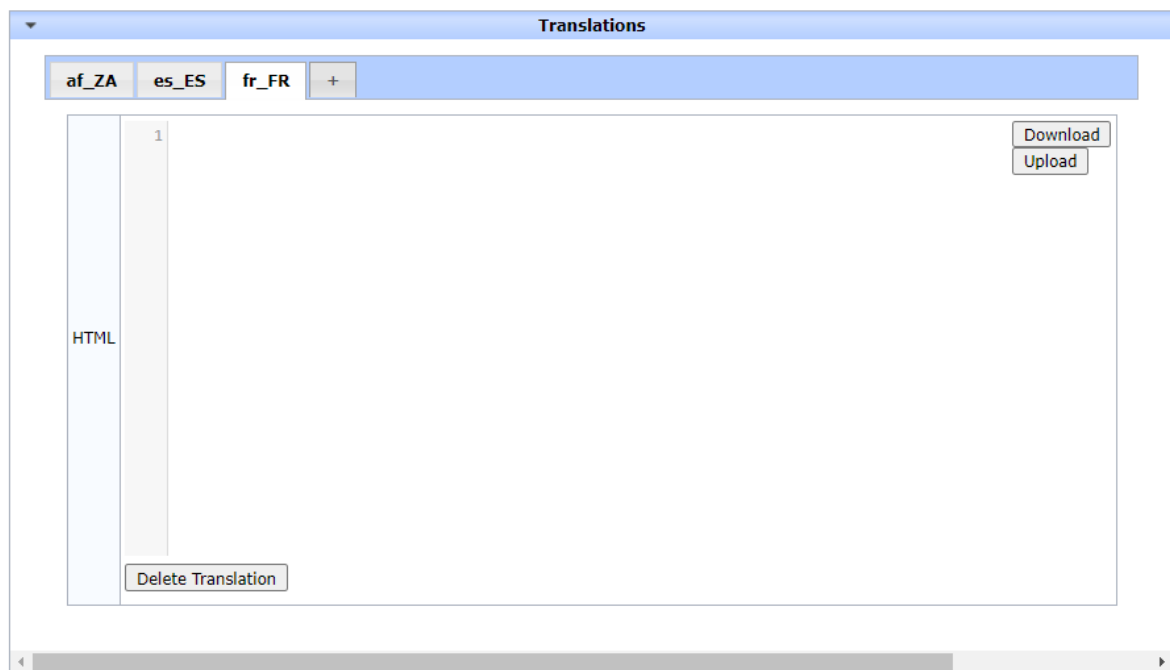
Translations

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.



2. Click the **+** tab and select from the available language options to create new language variants for the template.

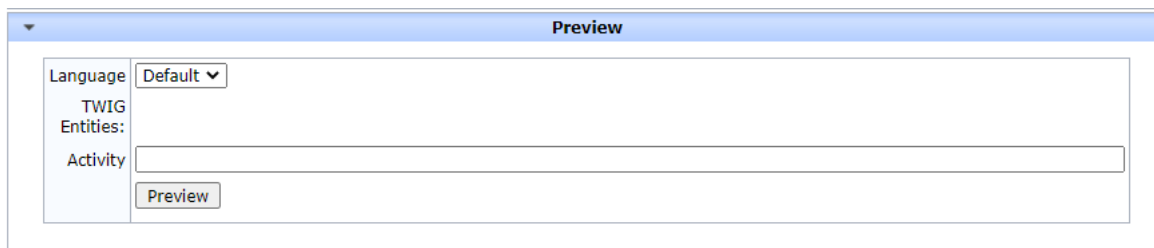


You can remove a translation by clicking **Delete Translation**.

Preview

You can see what the template looks like. To do so:

1. Click on the **Preview** bar to expand or shrink the section.



The screenshot shows a user interface for previewing templates. It features a blue header bar with the word "Preview". Below this, there is a light blue sidebar on the left with the following labels: "Language", "TWIG Entities:", and "Activity". The "Language" label is next to a dropdown menu currently showing "Default". The "TWIG Entities:" label is next to a large, empty text input field. The "Activity" label is next to a smaller, empty text input field. At the bottom of the sidebar is a button labeled "Preview".

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.

- 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.

Edit Activity Type

Activity Type Name: Address Check Activity Type

Payor: Default

Contract: Default

Communication Scheme: Default

Choose Campaign: None

Pathway: Address Check Pathway

Form Type: None

☐ Check that activity payor is valid for the patient

☐ Create an ad hoc appointment if appointment details available

☐ Pause

Limit Activity Type To:

- ☐ Administration
- ☐ Doctor
- ☐ Enhanced UI
- ☐ External Practitioner

Care Team Roles:

- ☒ Patient
- ☒ Referrer
- ☐ Care Coordinator
- ☐ Primary Care Physician
- ☐ Controlling Specialist
- ☐ Coach
- ☐ Test appt practitioner

Short code:

Activity Status Display Template: Check Address Activity Operator Template

Event	Criteria	Settings	Actions
- Select Event -			

Cancel Update

- 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.
- 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:

- Select the **Case State Operator Template** tab on the **HTML Template Management** page.

- 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.
- 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.

HTML Template	Type	Company	Language	Status	
Select	Select	Default	fr_FR	Select	New...

- Enter the name of the template.

[Return to HTML Template Management](#) Me | [Tasks...](#) | [New...](#)

Default

Create Case State Operator Templates

Import

Create

Template name

New Case State Operator Template

1

Download

Upload

Template CSS

1

Download

Upload

HTML

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.

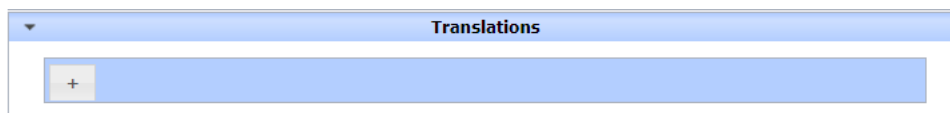


10. Find the new template in the list and click **Activate**. To make it easier to find the template, you can select **Pending** from the drop-down list in the **Status** field to display pending templates only. You cannot use the template until its status is **Active**.

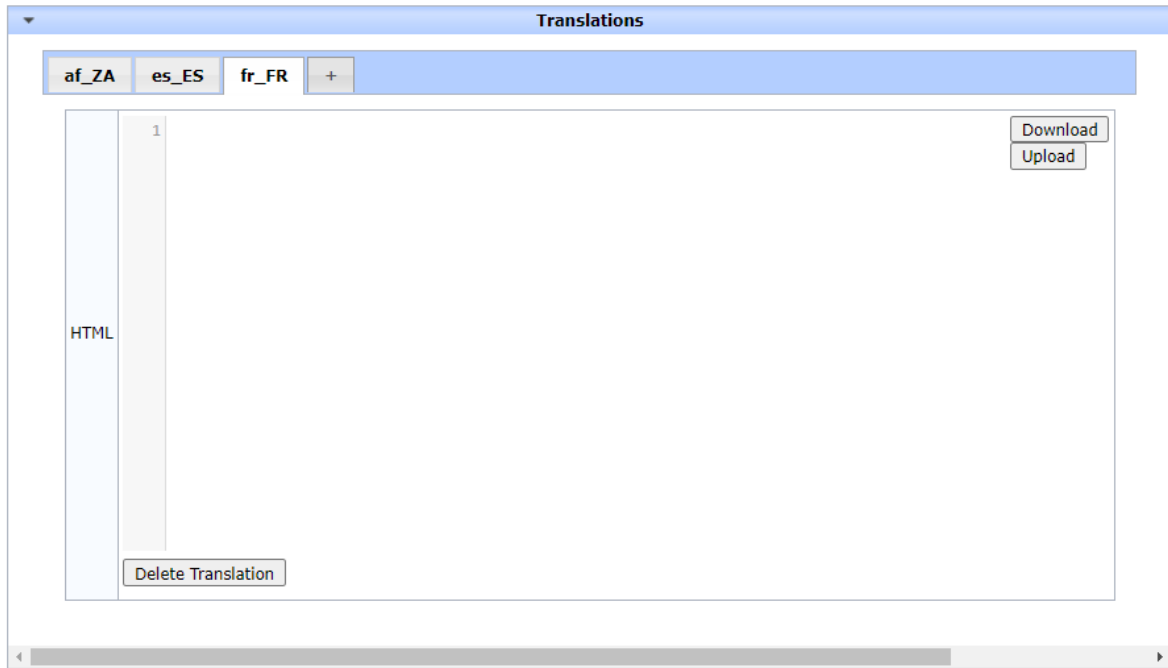
Translations

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.



- Click the **+** tab and select from the available language options to create new language variants for the template.

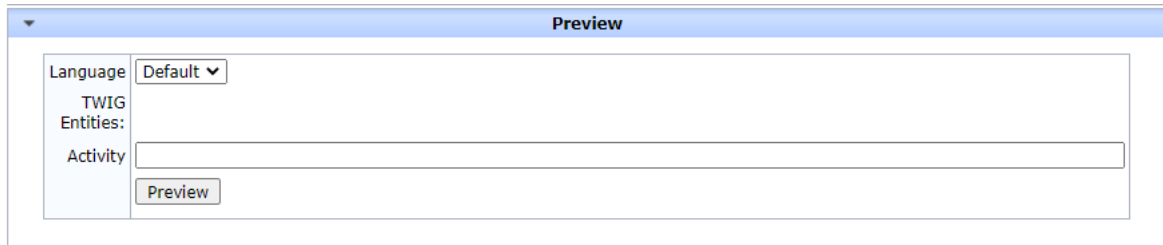


You can remove a translation by clicking **Delete Translation**.

Preview

You can see what the template looks like. To do so:

- Click on the **Preview** bar to expand or shrink the section.



- Leave the **Language** field as **Default** or select the language that you want to preview from the drop-down list.
- 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.
- Click **Preview** to display a preview of the template in a pop-up window.

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.

- Enter the name of the template.

Edit Form Layout Template

Activity Template: Export Delete Update

Template Name: Appt Confirmation Form

Template CSS:

```
@import url(https://fonts.googleapis.com/css?family=Nunito+Sans);
.pure-g [class *= "pure-u"] {
  font-family: "Nunito Sans", Helvetica, Arial, sans-serif;
}
input[type=text]:focus {
  background-color: lightblue;
}
.TaskForm {
  font-family: "Nunito Sans", Helvetica, Arial, sans-serif;
  font-weight: 300;
  font-size: 0.4cm;
}
```

HTML:

```
<script>
  if (window.location.pathname === '/Form.php') {
    jQuery('#page_heading').hide();
    jQuery('#patient_paragraph').hide();
  }
</script>
<div style="width: 100%; height: 1cm; background-color: #1D4189;">
  <div class="pure-g">
    <div class="pure-u-1">
      <section>
```

Translations

Preview

- 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.
- If multiple languages are configured for your organization, you can include translations - see [Translations \(page 13\)](#).
- You can preview the template - see [Preview \(page 14\)](#).
- When you have finished, click **Create**.
- Click **Return to HTML Template Management** at the top left hand side of the page.

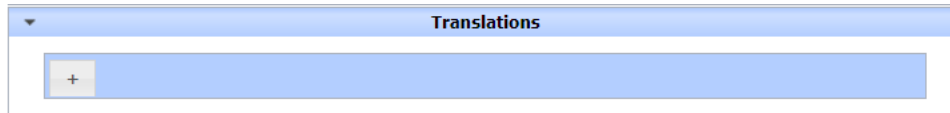


- Find the new template in the list and click **Activate**. To make it easier to find the template, you can select **Pending** from the drop-down list in the **Status** field to display pending templates only. You cannot use the template until its status is **Active**.

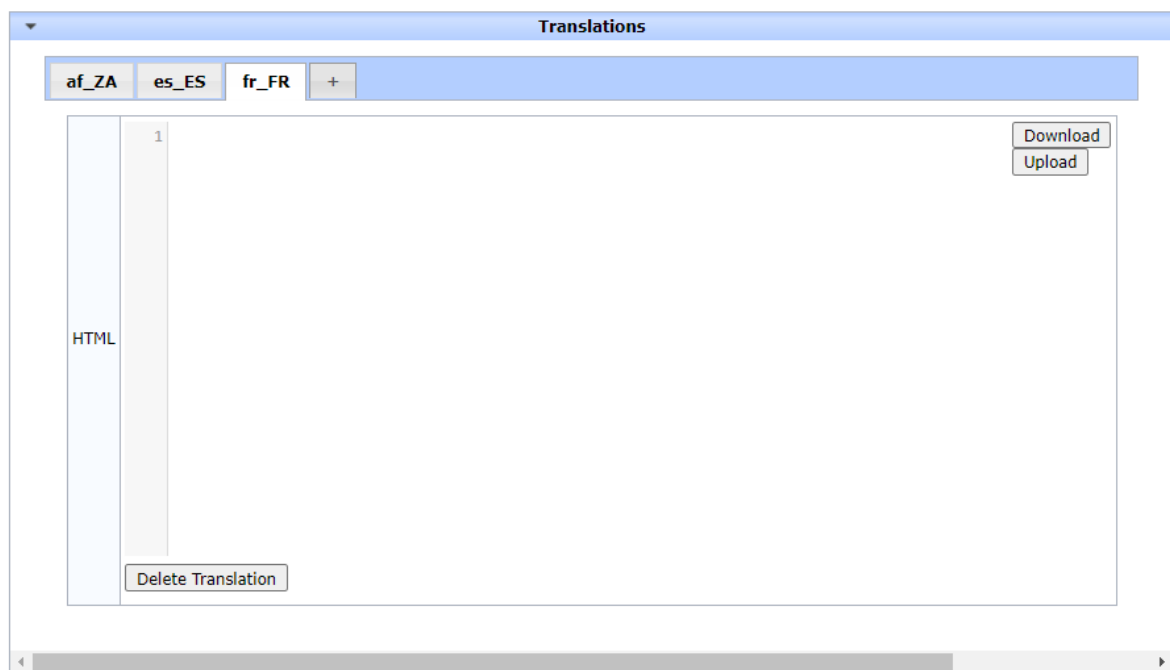
Translations

If multi-language configuration is enabled, you can create language translations for each template and any template variations. To do so:

- Click on the **Translations** bar to expand or shrink the section.



- Click the **+** tab and select from the available language options to create new language variants for the template.

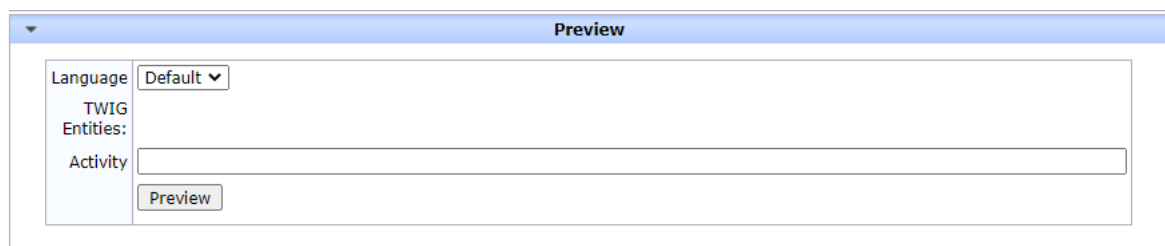


You can remove a translation by clicking **Delete Translation**.

Preview

You can see what the template looks like. To do so:

- 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.

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:

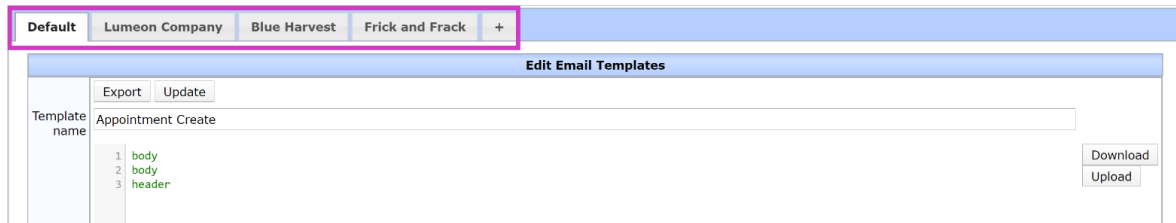
1. Select **Email Templates** in the **Communication** or **Pathway Logic** menu. Alternatively, select **HTML Template Management** in the **System Configuration** menu, and select the **Email Templates** tab. This displays a list of existing email templates.

Activity Operator Templates Case State Operator Templates Form Layouts Templates Email Templates								
HTML Template	Type	Company	Language	Status				
Select ▼	Select ▼	Default ▼	fr_FR ▼	Select ▼	New...			
Email Templates	Type	Company	Language	Status				
Appointment Create	System	Blue Harvest, Default, Frick and Frack, Lumeon Company	de_DE, en_GB, es_ES, fr_FR	Pending	Activate	Delete	Clone	
Appointment Reschedule	System	BBC, Blue Harvest, Default	en_GB, fr_FR	Active	Archive	Delete	Clone	
Class Booking	System	BBC, Blue Harvest, Default	en_GB, fr_FR	Active	Archive	Delete	Clone	
Clinical Report Published	System	Blue Harvest, Default	en_GB, fr_FR	Active	Archive	Delete	Clone	
Generic Appointment Create	Custom	BestHealth, Default	en_GB, fr_FR	Active	Archive	Delete	Clone	

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.

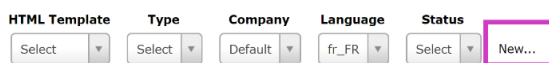
- Select an email template to display the **Default** email template which you can then edit, or click **+** to create email template versions for specific companies.



Create a new email template

To create a new email template:

- Click **New...** to create a new custom email template.



- 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.

HTML Template	Type	Company	Language	Status	New...
HTML <pre> 1 This is an HTML test email 2 <p> 3 <p> 4 </p> 5 Kind regards 6 <p> 7 </p> 8 Frick & Frack Clinic </pre>	Plain text This is a Plain text test email. Kind regards, Frick & Frack Clinic				
Sender: info@frickfrack.com (DO NOT REPLY) Subject: Your appointment has been booked!					

- 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 \(page 26\)](#).
- If multiple languages are configured for your organization, you can include translations - see [Translations \(page 28\)](#).
- You can preview the template - see [Preview \(page 29\)](#).
- When you have finished, click **Create**.
- Click **Return to HTML Template Management** at the top left hand side of the page.



- 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**.

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.

Export

Update

Template name

Appointment Reminder

Attach invite

☒

1

Download

Upload

Template CSS

1

HTML content

Download

Upload

HTML

Text content

Download

Upload

Plain text

Sender

reminderrr@lumeon.com

Subject

Appointment reminder

▶

iCal Link

▶

Attachments

▶

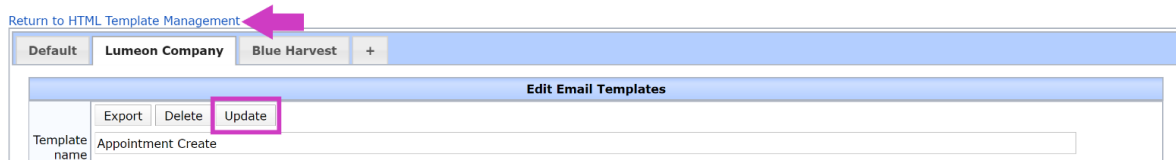
Translations

▶

Preview

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.

- If multiple languages are configured for your organization, you can add new translations or edit existing ones - see [Translations \(page 28\)](#).
- You can preview the template - see [Preview \(page 29\)](#).
- When you have finished, click **Update**.
- Click **Return to HTML Template Management** at the top left hand side of the page.



- 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) .

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**.

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.

Sender	infooo@lumeon.com (DO NOT REPLY) Sender email address invalid.
Subject	Your appointment has been booked!

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.

Attachments

☐ Attach appointment create letter
Attached files **Include for**

Choose file

No file chosen

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.

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.

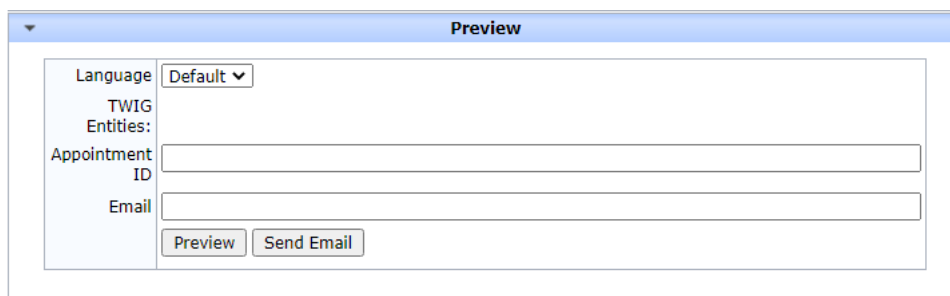
Conductor offers the ability to supply iCalendar information for each language variant for appointment related templates only. It also offers the ability to include attachments for each language variant.

You can remove a translation by clicking **Delete Translation**.

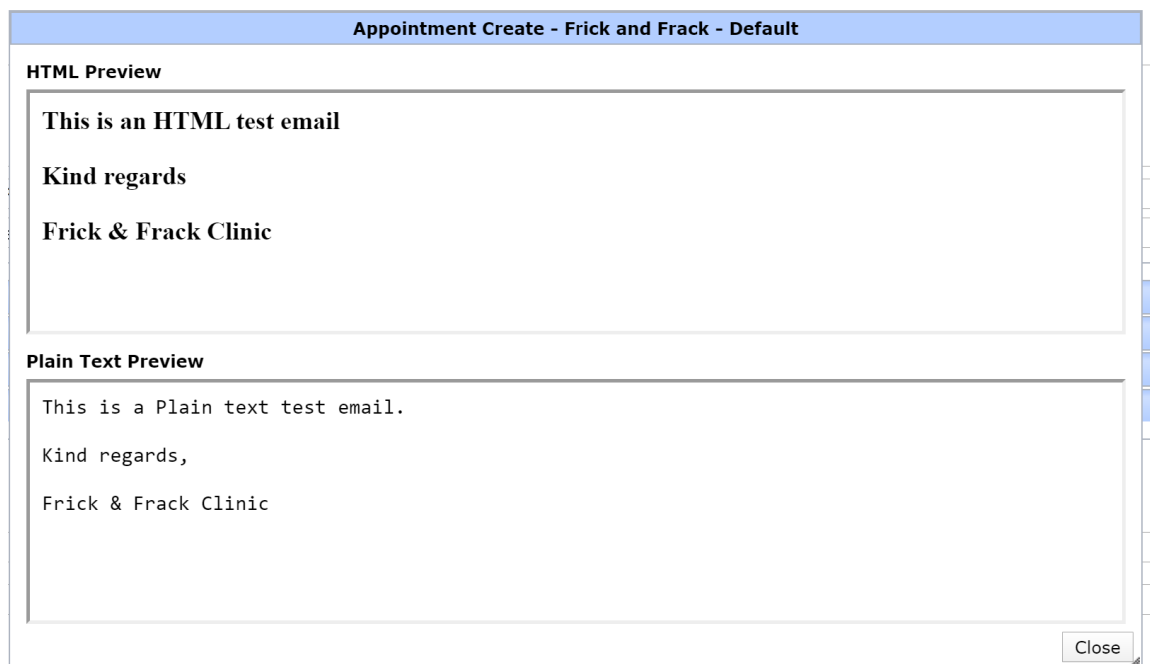
Preview

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.

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

Email template	Merge tags
Reset Password - Company	company_name title forename surname email link

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

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.

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

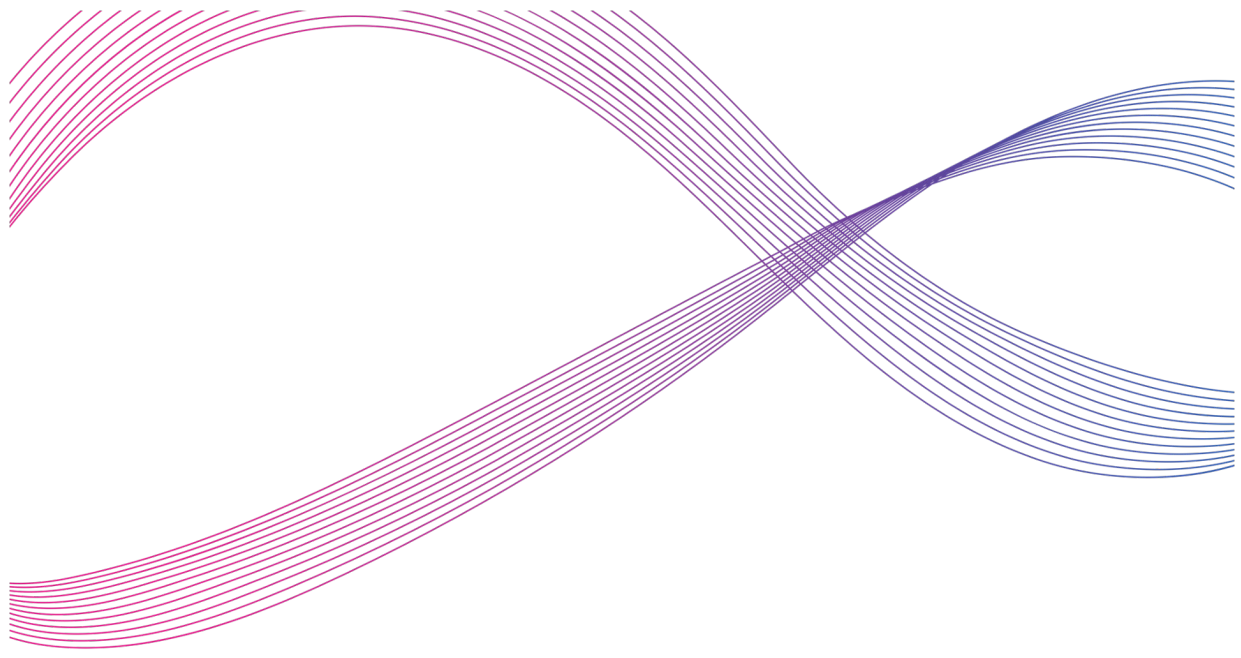
Email template	Merge tags
Custom 'action' emails - If the email has been linked to an appointment, these and 'Appointment Create/Modify/Cancel' tags can be used. If no appointment is linked, only these tags can be used.	patient_id patient_title patient_forename patient_surname patient_next_of_kin nhs_number 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

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	



Pathways in Lumeon Conductor 24.2

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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 behavior 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 behaviors 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.

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.

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.

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.

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.

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.

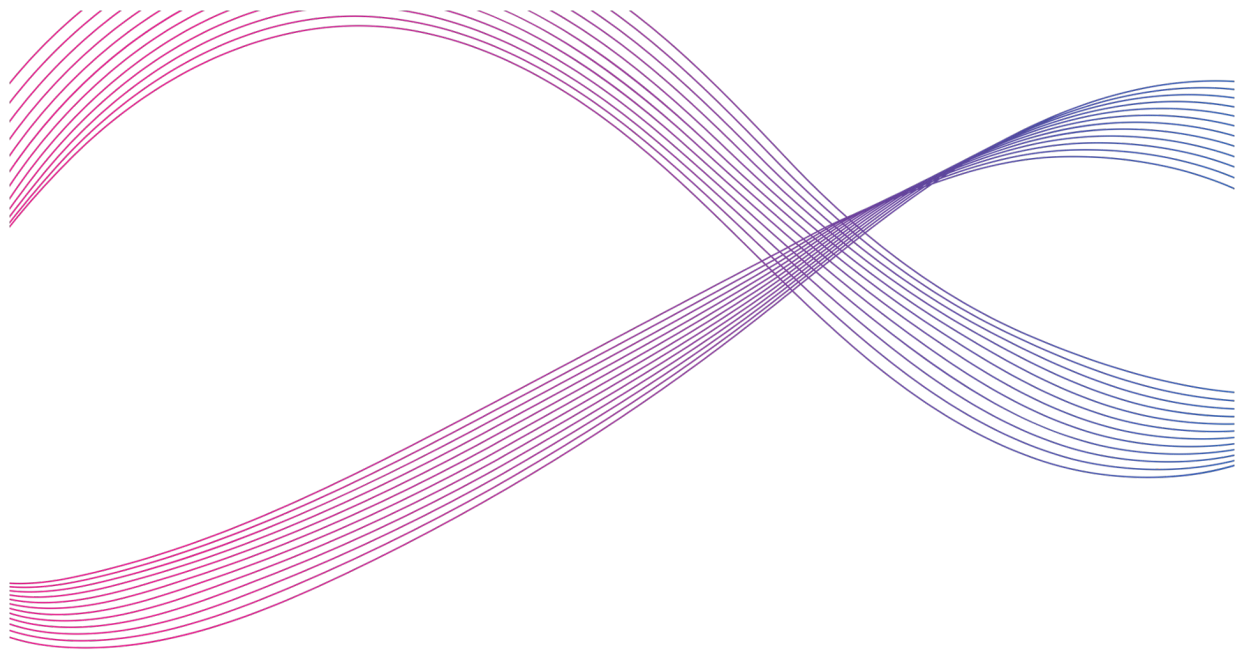
A check is performed when an activity is launched to ensure that the activity is not stale before launching, and forces a refresh if it is.

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.



Lumeon Conductor for Platform Administrators 24.2

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Introduction

Lumeon Conductor is a single web-based solution for patient management and administration. It enables you to manage patients effectively during their care journeys and configure the platform accordingly.

Purpose

This guide aims to guide platform administrators 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.

The purpose of this document is to:

1. Describe how to log into and out of Lumeon Conductor.
2. Explain how to view and change your personal details - see [My details \(page 5\)](#).
3. Describe how to:
 - Maintain providers and other members of staff - see [People \(page 6\)](#).
 - Create locations and location groups - see [Calendar \(page 9\)](#).
 - Set up and update email templates - see [Email templates \(page 12\)](#).
 - Set up and update SMS templates - see [SMS templates \(page 20\)](#).
 - Set up and update IVR templates - see [IVR templates \(page 25\)](#).
4. Describe how to run reports on request, and to create and update schedules to run the reports regularly. See [Reminder response reports \(page 32\)](#).

Log in and out

Log in to Lumeon Conductor

To log in to Lumeon Conductor you must access the Conductor web portal using your username and password. You should have received an email with these details before you log in for the first time.

Log out

To log out of Conductor, click **Log Off** in the top menu bar.

My details

The **My Details** page enables you to update your personal details.

In **Edit Personal Details**, you can set up your task preferences - whether you would like to receive emails and/or SMS when a task is assigned to you.

You can also reassign user-generated tasks and system-generated tasks to another user, if you are unavailable to do the tasks yourself.

Configure Conductor

The **Configuration** page has the following menus:

- **People** - Set up providers and other members of staff - see [People \(page 6\)](#).
- **Calendar** - Create locations and the rooms associated with the locations, and group locations together - see [Calendar \(page 9\)](#).
- **Communication** - Create email, SMS, and interactive voice response (IVR) message templates - see [Communication \(page 11\)](#).
- **Accounting** - Schedule and run reports - see [Reminder response reports \(page 32\)](#).

To view the **Configuration** page, click **Config** in the top menu bar.

People

There are two options in the **People** menu:

- **Providers** - Create and update providers.
- **Staff** - Create and update other members of staff.

Providers

You can create new providers or update the details for existing providers.

To create a new provider:

1. Select **Providers** in the **People** menu. The **Provider Management** page displays. A table of existing providers appears on the left. The **Create New Provider** form appears on the right.
2. Enter the provider's details using the table of fields below.
3. Click **Create**.

You can display or edit the details of a provider by selecting it in the table of **Providers** on the left.

You can click **Cancel** to remove a provider. 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 provider, contact Lumeon Support.

Provider fields

Use the following table to complete the provider's details. Fields with an asterisk (*) are mandatory.

Field	Description
Title*, First Name*, Last Name*, Sex*, Date of Birth, Zip Code*, Address, City, State, Country	Enter the provider'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 provider's preference of communication methods. You can disable communication methods that the provider 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 provider 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 provider when they are assigned a system- or user-generated task.
Custom admin access	Select this checkbox to give the provider custom administrator access.
Primary Location	Select a primary location to limit what is visible to the provider on worklists.
Available locations	Select the locations where the provider is available. These locations can be reported on.
Appointment Settings	Indicate which appointment settings the provider can offer appointments, for example, Telehealth, Clinic, Patient's Home.
Role	Enter the provider's role. This is shown on letters and clinical reports.
Qualifications	Free text field for entry of the provider's qualifications.
CSP No	Enter the provider's Chartered Society of Physiotherapy number.
HCPC No	Enter the provider's Health & Care Professions Council number.
GMC No	Enter the provider's General Medical Council number. You must enter this if the provider 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 provider'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 provider's name on their calendar.
Treatment Age	Enter the age range of patients that the provider will treat. This only applies when booking appointments through the search engine.
Colour	Enter the color of the calendar slots on the provider's calendar. Use an html code without the #.
Calendar Shortcut Key	Enter the shortcut key that takes you quickly to that provider's calendar in calendar mode. Use left Alt+shortcut key in calendar view.
Make calendars public	Enables this provider's calendars to be viewable to other providers.
Can view others' public calendars	Enables the provider to view other public providers' calendars.
Can view other providers' patients	Enables the provider to search for other providers' patients.
Can view other providers' journal entries	Enables the provider to view other providers' journal when in provider view.
Enable Rss Feed	Enables you to show calendars in Outlook or on an iPhone. If you select this, enter the RSS password.
Abbreviation	When shortcode calendar mode is enabled, this code displays the provider's calendar.
Employment Status	Select the provider'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.

Field	Description
Specialties	Select the specialties for this provider from the drop-down list. This defines which appointment types they are able to have booked in their calendar. You can select multiple specialties by holding down the Ctrl key and clicking on the required specialties.
Assistant	Select an assistant for this provider from the drop-down list. On login, the assistant can see the provider's calendar and patients.
Single Sign On User	Select to configure the provider to use single sign on.

Staff

You can add non-provider staff, such as administrators. To do this:

1. Select **Staff** in the **People** menu. A list of existing members of staff displays on the left and the **Create New Member of Staff** form displays on the right.
2. Enter the required details in the **Create New Member of Staff** form using the table of fields below.
3. Click **Create**.

You can select an existing member of staff to display their details and update them.

Staff fields

Use the following table to complete the staff member's details. Fields with an asterisk (*) are mandatory.

Field name	Description
Type	Select the type of staff member from the drop-down list.
Title*, First Name*, Last Name*, Sex*, Zip Code*, Address	Enter the staff member'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 staff member's preference of communication methods. You can disable communication methods that the staff member 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 staff member 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 staff member when they are assigned a system- or user-generated task.
Location	Select a primary location to display in certain drop-down menus.
Allowed Locations	Select the locations where the staff member is allowed. Users can access diaries for all locations but selecting locations restricts certain areas of worklists.
Assistant	Select an assistant for this staff member. An assistant can log in on behalf of a clinician and add EMR journal entries. Their data is logged as by X on behalf of Y where Y is the clinician they are assisting.
Role	Enter the staff member's role.
Single Sign On User	Select to configure the staff member to use single sign on.

Calendar

There are two options in the **Calendar** menu:

- **Locations** - Create locations where your providers hold their clinics and practices, and create the rooms within the locations.
- **Location groups** - Group locations together, either in the same geographical region or because of other features in common.

Locations

Create a location

To create a new location:

1. Select **Locations** in the **Calendar** menu. The **Locations Management** page is displayed. A list of existing locations displays in the **Locations** table on the left, and the **Create New Location** form displays on the right.
2. Complete the **Create New Location** form using the table of fields below.
3. Once completed, click **Create** to save the new location. Rooms associated with a location are displayed on the right.

You can select a location from the list of existing locations to view or update it. You can add rooms to the location.

Location fields

Use the following table to complete the location details in the **Create New Location** form. The fields displayed may vary depending on your configuration.

Field name	Description
Location	Enter the name of the location.
Short Name	Not required but may be used in custom reports.
Alternative Name	Enter an alternative name for the location, if required.
Alternative Short	Enter an alternative short name for the location, if required.
Patient Invoice, Company Invoice, Insurance Company Invoice, Patient Credit Note, Company Credit Note, Insurance Company Credit Note, External Provider Credit Note Templates	Enter the templates for these letters, if required.
Healthcode Site Name	Ignore this field.
Calendar Shortcut Key	Enter a shortcut key to take you quickly to that site in calendar mode. Use left Alt + shortcut key in calendar view.
Zip Code, Address, City, State, Country, Telephone, Fax, Email	Enter the location contact details. The Look Up option enables searching via the zip code if integrated with Conductor's location services provider.
Time Zone	Enter the time zone for the location.
Appointment Letter	Select which letter template is automatically be generated when an appointment is booked. This can be overridden if an appointment letter is selected for an appointment type associated with a contract.

Field name	Description
Default Task Assignee	Enter the user who receives system-generated tasks if Conductor sends them to the location.
Note	These notes appear when the cursor hovers over a diary location. You can use these to display useful information such as opening hours or access constraints.
Additional Location Details	Enter additional details for the location. This field displays in call center view when you hover the cursor over the location name. You can use these to display useful information such as opening hours, additional email addresses, or access constraints.
Default Payor	Select the default payor company from the drop-down list.
Treatment Age	Specify the minimum and maximum age of a patient that can be treated on site. If you leave the field blank, no restrictions are applied.
Upload Logo	You can embed an uploaded location logo into letter templates by using the merge tags <<start_appointment_centre_logo>> and <<end_appointment_centre_logo>> and placing an image placeholder of the correct size between them.
Upload Map	You can embed an uploaded location map into letter templates by using the merge tags <<start_appointment_centre_map>> and <<end_appointment_centre_map>> and placing an image placeholder of the correct size between them.
Set as admin location	Select this check box so that new enquiries can be created using this location even if it is not linked to the payor's contract. If you do not select this check box, new enquiries can only be created using locations that are associated with the payor's contract.
Region	
Cost Centre New	
Cost Centre Old	

Create rooms

To create rooms within a location:

1. Select **Locations** in the **Calendar** menu.
2. On the **Location Management** page, select the name of the location to view the details.
3. Use the **Create New Room** form on the right to enter the name of the room to be created.

The screenshot shows the 'Create New Room' form. At the top, there's a section titled 'Rooms' with a table. The table has three columns: 'Location Name', 'AE', and 'Modality'. Below the table, there are two rows: 'Room 1' and 'Room 2', each with a 'Cancel' button. Below this is the 'Create New Room' section. It contains a 'Name' input field, a 'DICOM AE' dropdown menu with 'None' selected, and a blue 'CREATE' button at the bottom right.

4. Click **Create**.

Created rooms appear in the **Room Management** page for each location. Rooms can only be associated with a single location.

Location groups

If your organization has multiple locations, you can group locations together to form a location group. For example, you might want to group locations by region: South East, South West, North West, and North East.

To create a location group:

1. Select **Location Groups** in the **Calendar** menu to display the **Location Groups Management** page. A table of all existing **Location Groups** displays on the left, and a **Create Location Group** form displays on the right.
2. Enter a name for the group in the **Name** field, then select all the required locations, using the **Ctrl** key.



The screenshot shows a web form titled "Create Location Group". It has two main sections: "Name" and "Locations". The "Name" section has a text input field containing "Northern Group". The "Locations" section has a list of five locations: "Ganymede Clinic", "North Clinic", "North Western Clinic", "Roberto Clinic", and "South Clinic". The "North Western Clinic" is highlighted with a grey background, indicating it is selected. At the bottom right of the form is a blue button labeled "CREATE".

3. Click **Create**.

Communication

You can use the communication menu to set up and update email, SMS, and IVR templates.

There are two options on the **Communication** menu:

- **Email Templates** - Set up and update email templates.
- **SMS & IVR Templates** - Set up and update interactive SMS and interactive voice response (IVR) message templates.

Email templates

You can create or update email templates that you want to send to patients, providers, or other members of staff.

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.

Activity Operator Templates Case State Operator Templates Form Layouts Templates Email Templates									
HTML Template	Type	Company	Language	Status					
Select	Select	Default	fr_FR	Select	New...				
Email Templates	Type	Company	Language	Status					
Appointment Create	System	Blue Harvest, Default, Frick and Frack, Lumeon Company	de_DE, en_GB, es_ES, fr_FR	Pending	Activate	Delete	Clone		
Appointment Reschedule	System	BBC, Blue Harvest, Default	en_GB, fr_FR	Active	Archive	Delete	Clone		
Class Booking	System	BBC, Blue Harvest, Default	en_GB, fr_FR	Active	Archive	Delete	Clone		
Clinical Report Published	System	Blue Harvest, Default	en_GB, fr_FR	Active	Archive	Delete	Clone		
Generic Appointment Create	Custom	BestHealth, Default	en_GB, fr_FR	Active	Archive	Delete	Clone		

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.
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.

Default	Lumeon Company	Blue Harvest	Frick and Frack	+
----------------	----------------	--------------	-----------------	---

Export

Update

Template name

Appointment Create

1. body

2. body

3. header

Download

Upload

Create a new email template

To create a new email template:

1. Click **New...** to create a new custom email template.

HTML Template	Type	Company	Language	Status	
Select	Select	Default	fr_FR	Select	New...

- 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.

HTML	<pre> 1 This is an HTML test email 2 <p> 3 <p> 4 </p> 5 Kind regards 6 <p> 7 </p> 8 Frick & Frack Clinic </pre>
Plain text	This is a Plain text test email. Kind regards, Frick & Frack Clinic
Sender	info@frickfrack.com (DO NOT REPLY)
Subject	Your appointment has been booked!

- 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 \(page 16\)](#).
- If multiple languages are configured for your organization, you can include translations - see [Translations \(page 18\)](#).
- You can preview the template - see [Preview \(page 19\)](#).
- When you have finished, click **Create**.
- Click **Return to HTML Template Management** at the top left hand side of the page.



- 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**.

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.

ExportUpdate

Template name

Appointment Reminder

Attach invite

☒

1

Download

Upload

Template CSS

1

HTML content

Download

Upload

HTML

Text content

Download

Upload

Plain text

Sender

reminderrr@lumeon.com

Subject

Appointment reminder

▶

iCal Link

▶

Attachments

▶

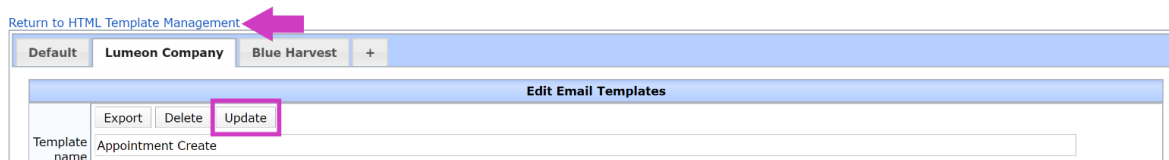
Translations

▶

Preview

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 \(page 16\)](#). The **Import** option is not available when editing an existing email template.

4. If multiple languages are configured for your organization, you can add new translations or edit existing ones - see [Translations \(page 18\)](#).
5. You can preview the template - see [Preview \(page 19\)](#).
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 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 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 17) .
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 18) .
Attachments	You can attach documents to email templates to be included when distributed. See Attachments (page 17) .
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 18) .
Preview	Select this option to view a preview of the email template. See Preview (page 19) .

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**.

The screenshot shows the 'Create Email Templates' interface. At the top, there are 'Import' and 'Create' buttons. Below them, the 'Template name' field contains 'Secure Test'. The 'Secure Email' checkbox is checked. The 'Template CSS' and 'HTML' sections are empty, each with a '1' in a small box. The 'Plain text' section is also empty. On the right side, there are 'Download' and 'Upload' buttons for each section.

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.

Sender	infooo@lumeon.com (DO NOT REPLY) Sender email address invalid.
Subject	Your appointment has been booked!

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.

Attachments

☐ Attach appointment create letter

Attached files

Include for

No file chosen

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.

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.

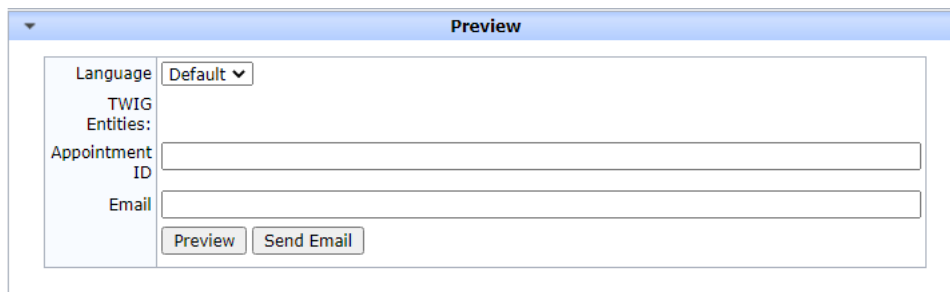
Conductor offers the ability to supply iCalendar information for each language variant for appointment related templates only. It also offers the ability to include attachments for each language variant.

You can remove a translation by clicking **Delete Translation**.

Preview

You can preview the email template. To do so:

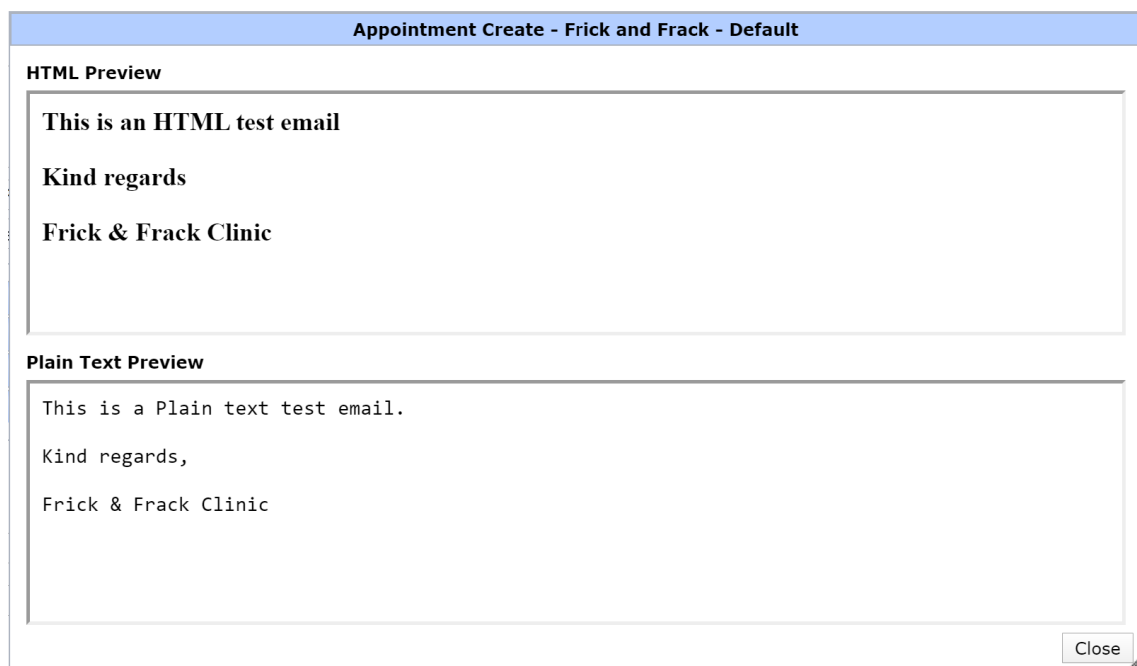
1. Click on the **Preview** bar to expand or shrink the section.



The screenshot shows a 'Preview' section with a blue header. Below the header is a form with the following fields and buttons:

- Language:** A dropdown menu set to 'Default'.
- TWIG Entities:** A label followed by a text input field.
- Appointment ID:** A text input field.
- Email:** A text input field.
- Buttons:** 'Preview' and 'Send Email' buttons are located at the bottom right of the form.

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.



The screenshot shows a window titled 'Appointment Create - Frick and Frack - Default'. It contains two preview sections:

- HTML Preview:** Displays the email content with HTML formatting, including bold text: 'This is an HTML test email', 'Kind regards', and 'Frick & Frack Clinic'.
- Plain Text Preview:** Displays the same email content in plain text: 'This is a Plain text test email.', 'Kind regards,', and 'Frick & Frack Clinic'.
- Close Button:** Located at the bottom right of the window.

- **Send Email** - Supply an email address to generate an email replicating the end user communication.

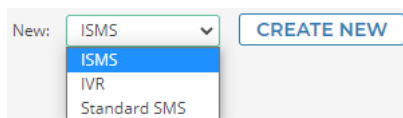
SMS templates

You can set up and update interactive SMS (ISMS) templates for messages that you want to send to patients, providers, and other members of staff.

Create a new ISMS template

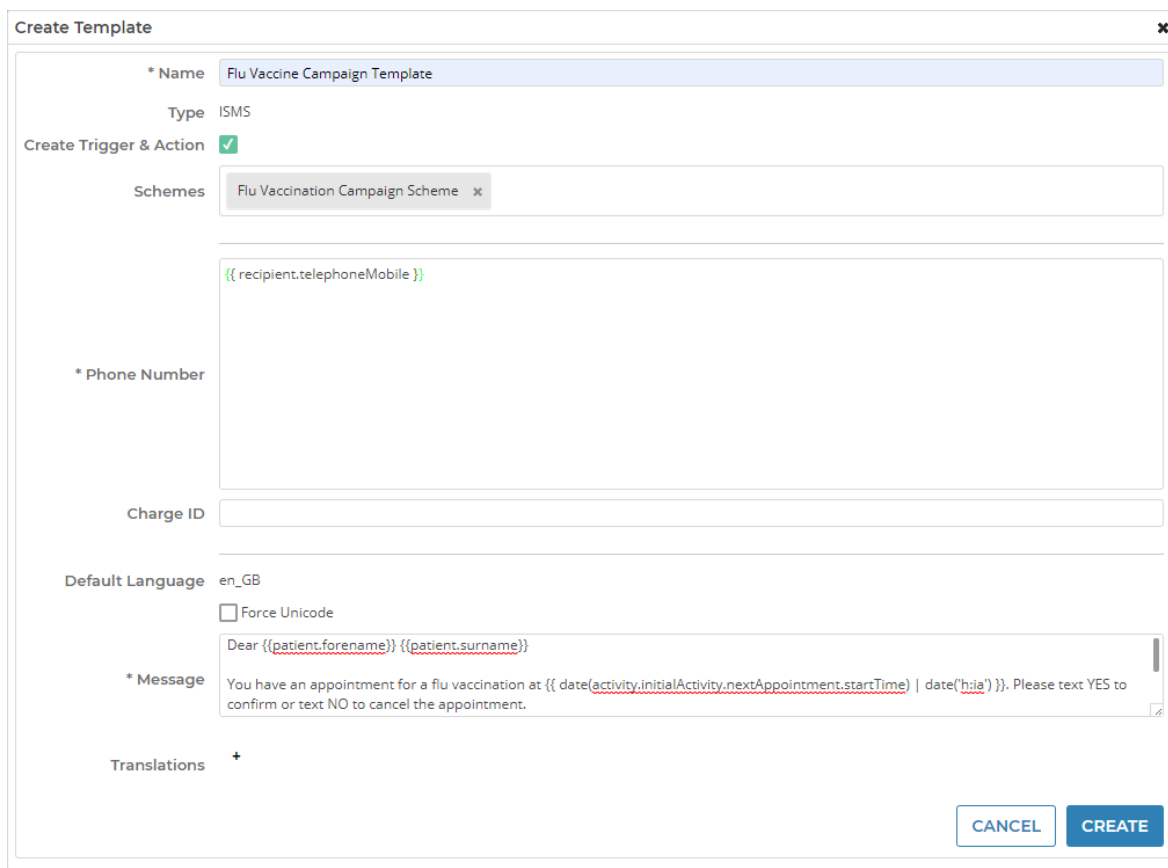
To create a new ISMS template:

1. Select **ISMS** in the drop-down list in the **New** field.



The screenshot shows a 'New:' label followed by a dropdown menu. The dropdown menu is open, showing three options: 'ISMS' (highlighted in blue), 'IVR', and 'Standard SMS'. To the right of the dropdown is a 'CREATE NEW' button.

2. Click **Create New** to display the **Create Template** page in a new window.



The screenshot shows the 'Create Template' page. The title bar says 'Create Template'. The form contains the following fields and options:

- * Name:** Flu Vaccine Campaign Template
- Type:** ISMS
- Create Trigger & Action:** ☒
- Schemes:** Flu Vaccination Campaign Scheme x
- * Phone Number:** A large text area containing the placeholder `{{ recipient.telephoneMobile }}`.
- Charge ID:** An empty text field.
- Default Language:** en_GB
- Force Unicode:** ☐
- * Message:** A text area containing the message: "Dear {{(patient.forename)}} {{(patient.surname)}} You have an appointment for a flu vaccination at {{ date(activity.initialActivity.nextAppointment.startTime) | date('h:ia') }}. Please text YES to confirm or text NO to cancel the appointment."
- Translations:** A plus sign icon.

At the bottom right, there are two buttons: 'CANCEL' and 'CREATE'.

3. Complete the fields using the table below to create a new ISMS template - see [ISMS template fields \(page 21\)](#).
4. If multiple languages are configured for your organization, you can add new translations - see [Create ISMS translations \(page 22\)](#).
5. When you have finished, click **Create**. The new ISMS template displays in the list of templates.

After you have created the ISMS template, you can preview it - see [Preview an ISMS template \(page 24\)](#).

Edit an ISMS template

To edit an ISMS 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 - see [ISMS template fields \(page 27\)](#).
3. If multiple languages are configured for your organization, you can add new translations or edit existing ones - see [Create ISMS translations \(page 22\)](#).
4. You can preview the template - see [Preview an ISMS template \(page 24\)](#).
5. When you have finished, click **Update**.

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 center 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 (page 21) 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 (page 22) .

Emojis

You can add emojis to ISMS messages. To do this:

1. Find the emoji that you want to use. See <https://unicode.org/emoji/charts/full-emoji-list.html> for a comprehensive list of emojis.

- Copy the emoji and paste it into the message field. If using the link above, highlight and copy the emoji in the **Browser** column.

Smileys & Emotion														
face-smiling														
No	Code	Browser	Appl	Goog	FB	Wind	Twtr	Joy	Sams	GMail	SB	DCM	KDDI	CLDR Short Name
1	U+1F600													grinning face
2	U+1F603													grinning face with big eyes
3	U+1F604													grinning face with smiling eyes
4	U+1F60A													beaming face with smiling eyes

- Paste the emoji into the appropriate place in the **Message** field. You may find that the emoji displays differently depending on the browser, device, or app that you and your patients are using to read the message.

Create Template

* Name

Type ISMS

Create Trigger & Action

* Phone Number

Charge ID

Default Language en_GB

☒ Force Unicode

* Message

Translations

CANCEL

CREATE

Dear {{ recipient.name.forename }}
 You have an appointment for a flu vaccination at {{ (activity.nextAppointment.location.name) }} at {{ (date(activity.nextAppointment.startTime) | date('h:ia')) }} on {{ (date(activity.nextAppointment.startTime) | date('F d')) }}. 📞 Press 1 to confirm or press 3 to cancel the appointment.

- Select the **Force Unicode** check box, if it is not already selected, to ensure that the emoji displays correctly in your message.

Create ISMS translations

If multi-language configuration is enabled, you can create language translations for each ISMS 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 an ISMS template:

- In the **Create Template** or **Update Template** window, click **+** beside **Translations** and select the language in the drop-down list.

- In the **Languages** field, select the required language in the drop-down list.

- 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 in the template.
- 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 include statements in place. Otherwise, enter the text, Twig tags, and include statements, in the **Template** field. See [Include tags](#) for more information.

- The **Force Unicode** checkbox is automatically selected if you choose a language that Conductor defines as using non-standard characters. Select **Force Unicode** if you include non-standard characters or emojis in the translation. See [Emojis \(page 21\)](#) and [Languages in SMS and IVR templates](#) for more information.

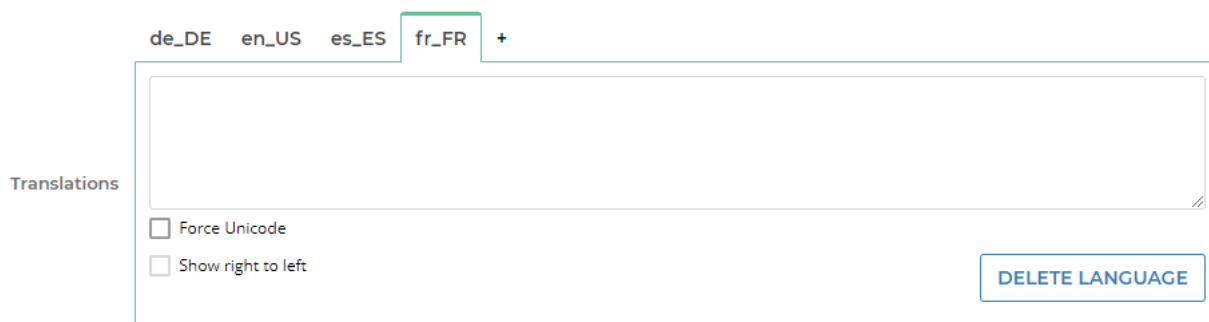
You can also clear this checkbox if you are sure that the message does not contain any non-standard characters and it might go over the 70 character limit for a Unicode message. See [Unicode](#) and [SMS message length](#) and for more information.

- If Conductor defines the language as one that is written right to left, the **Show right to left** checkbox is automatically selected. See [Create templates for right to left languages](#) for more information. You can clear this checkbox to show the message written left to right if you want to check that the Twig expressions are correct.
- When you have finished, click **Create Language**.

When you edit a template, you can see the tabs for the translations that you have created, in alphabetical order.



You can remove a translation by selecting the appropriate tab and clicking **Delete Language**.



Preview an ISMS template

You can preview an ISMS template to see what it looks like when you send it. To do this:

- Display the ISMS template by selecting its name in the list of templates.
- In the **Preview** section at the end of the template, select the language for the preview. The default language displays but you can select other language translations that you have created.
- Enter the **Activity ID**. This must be a valid activity ID for a patient in the pathway that uses this template so that Conductor can resolve the Twig expressions in the previewed message.
- Enter the **Preview Number**. This is the number that you want to send the preview of the ISMS template to, for example, your cellphone number.
- Click **Send ISMS**.

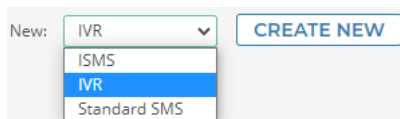
IVR templates

You can set up and update interactive voice response (IVR) templates for voice messages that you want to send to patients.

Create a new IVR template

To create a new IVR template:

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.
3. Complete the fields using the table below to create a new IVR template - see [IVR template fields \(page 26\)](#).
4. If multiple languages are configured for your organization, you can add new translations - see [Create IVR translations \(page 30\)](#).
5. When you have finished, click **Create**. The new IVR template displays in the list of templates.

After you have created the IVR template, you can preview it - see [Preview an IVR template \(page 31\)](#).

Edit an IVR template

To edit an IVR 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 - see [IVR template fields \(page 26\)](#).
3. If multiple languages are configured for your organization, you can add new translations or edit existing ones - see [Create IVR translations \(page 30\)](#).
4. You can preview the template - see [Preview an IVR template \(page 31\)](#).
5. When you have finished, click **Update**.

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.

The screenshot shows the 'Create Template' window with the following fields and values:

- Name:** Appointment Reminder IVR Template
- Type:** IVR
- Create Trigger & Action:** ☒
- Schemes:** Default Scheme
- Phone Number:** `{{ if recipient.telephoneDay is not empty and activity.property('Day number status') in ['Cellphone','Landline','Virtual'] %}} {{recipient.telephoneDay}} {{else %}} {{recipient.telephoneMobile}} {{endif %}}`
- Caller ID:** `{{lookup.get('locationCLI', activity.nextAppointment.location.name), 'Error'}}}}`
- Charge ID:** Outpatient
- Voicemail Detection:** Continue

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.

General template field	Description
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 center 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 behavior is provided for all these cases.

IVR call state matrix fields

An example of a call state matrix is shown below.

* Voicemail Detection Continue ▾

Call State	Label	Action	Repeat	Check Length	1	2	3	4	5	6	7	8	9	0	#	*	0	?	
Voicemail	A	None ▾	Yes ▾		▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	
Initial	B	Collect Digit ▾	No ▾		C ▾	▾	D ▾	▾	E ▾	▾	F ▾	▾	G ▾	▾	B ▾	▾	▾	H ▾	I ▾
Confirm	C	None Delete	No ▾		▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	
Cancel	D	Collect Digit Delete	No ▾		▾	B ▾	▾	▾	▾	▾	▾	▾	E ▾	▾	▾	▾	▾	H ▾	I ▾
Reschedule	E	Connect Delete	No ▾		▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	
Help	F	Connect Delete	No ▾		▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	
Stop	G	None Delete	No ▾		▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	▾	
No Response	H	None Delete	No ▾		C ▾	▾	D ▾	▾	E ▾	▾	F ▾	▾	G ▾	▾	B ▾	▾	▾	H ▾	I ▾
Unrecognized	I	None Delete	No ▾		C ▾	▾	D ▾	▾	E ▾	▾	F ▾	▾	G ▾	▾	B ▾	▾	▾	H ▾	I ▾

Add call state name

[ADD CALL STATE](#)

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.

Call state matrix field	Description
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.

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.

Call State

Voicemail

Variable Message

en_GB Hello {{ recipient.name.firstname }}. We are calling from Lumeon Healthcare to remind you of your upcoming appointment at {{ activity.nextAppointment.location.name }}.

ES_ES +

Hola {{ recipient.name.firstname }}. Llamamos desde Lumeon Healthcare para recordarle su próxima cita en {{ activity.nextAppointment.location.name }}.

Fixed Message

en_GB Please call 1-888-LUM to cancel or reschedule your appointment.

ES_ES +

Llame al 1-888-LUM para cancelar o reprogramar su cita.

DELETE LANGUAGE

Call State

Initial

Variable Message

en_GB Hello {{ recipient.name.firstname }}. We are calling from Lumeon Healthcare to remind you of your upcoming appointment at {{ activity.nextAppointment.location.name }}.

ES_ES +

Hola {{ recipient.name.firstname }}. Llamamos desde Lumeon Healthcare para recordarle su próxima cita en {{ activity.nextAppointment.location.name }}.

Fixed Message

en_GB To confirm the appointment, press 1. To cancel the appointment, press 3. To reschedule the appointment, press 5. For help, press 7. If you would no longer like to receive these calls, press 9. To repeat this message, press 0.

ES_ES +

Para confirmar esta cita, presione 1. Para cancelar la cita, presione 3. Para reprogramar, presione 5. Para obtener ayuda, presione 7. Si ya no desea recibir estas de recordatorio, presione 9. Para repetir este mensaje, presione 0.

DELETE LANGUAGE

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 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 (page 30) .

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 (page 30) .
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.

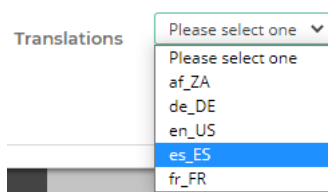
Create IVR translations

If multi-language configuration is enabled, you can create language translations for the variable and fixed messages for each call state in the IVR 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 an IVR template:

1. In the **Create Template** or **Update Template** window, click **+** below the variable or fixed message field in the appropriate call state and select the language in the drop-down list.
2. In the **Languages** field, select the required language in the drop-down list.



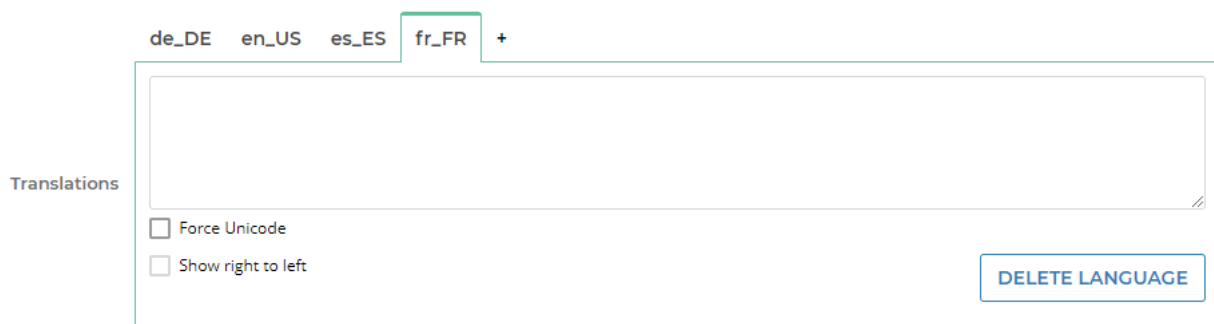
3. You may want to copy the text in the appropriate **Variable Message** or **Fixed Message** field for the default language so that you can paste it into the same field in the new translation, especially if you have Twig tags or include statements in the template.
 4. If you have copied the template text in the default language, paste it into the translation field for the new language translation. Replace the plain text in the original language with the new language while keeping the Twig tags and include statements in place.
- Otherwise, enter the text, Twig tags, and include statements, in the translation field. See [Include tags](#) for more information.

- If Conductor defines the language as one that is written right to left, the **Show right to left** checkbox is automatically selected. See [Create templates for right to left languages](#) for more information. You can clear this checkbox to show the message written left to right if you want to check that the Twig expressions are correct.
- When you have finished, click **Create Language**.

When you edit a template, you can see the tabs for the translations that you have created, in alphabetical order.



You can remove a translation by selecting the appropriate tab and clicking **Delete Language**.



Preview an IVR template

You can preview an IVR template to see what it looks like when you send it. To do this:

- Display the IVR template by selecting its name in the list of templates.
- In the **Preview** section at the end of the template, select the language for the preview. The default language displays but you can select other language translations that you have created.
- Enter the **Activity ID**. This must be a valid activity ID for a patient in the pathway that uses this template so that Conductor can resolve the Twig expressions in the previewed message.
- Enter the **Preview Number**. This is the number that you want to send the preview of the IVR template to, for example, your cellphone number.
- Click **Send IVR**.

Reminder response reports

The appointment reminder solution provides the **Reminder Response Report**. Use the **Accounting** menu to run the Response Reminder Report when required, and to create and update schedules to run the report regularly. There are two options on the **Accounting** menu:

- **Reports** - Use this option to:
 - Run the Reminder Response Report whenever you want.
 - Create a new schedule for the Reminder Response Report.
- **Reports Scheduler** - Update the schedules for the Reminder Response Report.

Run a report

You can use this option to run the Reminder Response Report whenever it is required. To do this:

1. Select **Reports** in the **Accounting** menu.
2. Select **Reminder Response Report** in the **Reports** list to display the report parameters.

Report Parameters

List of all reminders, filtered by appointment date

Start Date

End Date

Location

☐ Create user Tasks when the report completes

RUN REPORT

[+ Schedule this report](#)

3. Enter the report details using the [table of fields \(page 33\)](#) below.
4. Click **Run Report**. Conductor produces the report as a CSV file which you can save and view using a tool such as Microsoft Excel.

You can also schedule a report by clicking **Schedule this report** - see [Schedule a report \(page 34\)](#).

Report parameter fields

Use the following table to complete the report parameters.

Field name	Description
Start Date	Enter the start appointment date for the report.
End Date	Enter the end appointment date for the report.
Location	Select the location for the report from the drop-down list or leave as All to run the report for all locations.
Create user tasks when the report completes	Select if you want to create user tasks when the report completes. Keep clear if you do not want to create them.

Report format

The Reminder Response Report contains the following information:

- Activity ID
- Activity created date
- MRN
- Patient name
- Date of birth
- Telephone numbers
- External appointment ID
- Provider
- Appointment date and time
- Location
- Reminder status - for example, whether the appointment was confirmed, cancelled, or no response.
- Code
- Reminder type - whether SMS or IVR.
- Date and time of most recent contact attempt
- Visit type - for example, Video, Telehealth, or Clinic.

Schedule a report

You can create a new schedule for the Reminder Response Report. To do this:

1. Select **Reports** in the **Accounting** menu.
2. Select **Reminder Response Report** in the **Reports** list to display the report parameters.

Report Parameters

List of all reminders, filtered by appointment date

Start Date

End Date

Location

☐ Create user Tasks when the report completes

RUN REPORT

[+ Schedule this report](#)

3. Click **Schedule this report** below the Report Parameters to display the Report Scheduler form.
4. Enter the report details using the [table of fields \(page 34\)](#) below.
5. Click **Save**. Conductor automatically sets the report schedule to notify you when the report is run. If you want to change this or add other users to be notified, update the report schedule - see [Update a report schedule \(page 34\)](#).

Report scheduler fields

Use the following table to complete the report scheduler details.

Field name	Description
Location	Select the location for the report from the drop-down list or leave as All to run the report for all locations.
First Run Date	Enter the first date that you want to run the report.
Repeat	Select how often the report is to be run from the drop-down list. Select Daily, Weekly, Fortnightly, Monthly, Quarterly, or Annually .
Date Range	Select the date range for the report scheduler. Select 1 Day, 1 Week, 2 Weeks, 1 Month, 3 Months, or 1 Year .

Update a report schedule

The Reminder Response Report is scheduled to run:

- Daily for a two week date range.
- Weekly for a weekly date range.

You can update the report scheduling, for example, if you want to add users to be notified when the report is run. To do this:

1. Select **Reports** in the **Accounting** menu.
2. Click on the report you want to reschedule in the **Reports Scheduler** list. The Report Scheduler details display on the right hand side.

Report Scheduler

Location: All

Notify Users: Kim Westminster x Sky Southwark x Rowan Richmond x

Next Run Date: 02/23/2022

Repeat: Daily

Date Range: 2 Weeks

SAVE

3. Enter the report scheduler details using the [table of fields \(page 35\)](#) below.
4. Click **Save**.

Report scheduler fields

Use the following table to complete the report scheduler details.

Field name	Description
Location	Select the location for the report from the drop-down list or leave as All to run the report for all locations.
Notify Users	Add users to be notified when the report is run by selecting their names from the drop-down list. Remove users by clicking x next to their name.
Next Run Date	Change the next run date for the report, if required.
Repeat	Select how often the report is to be run from the drop-down list. Select Daily, Weekly, Fortnightly, Monthly, Quarterly, or Annually .
Date Range	Select the date range for the report scheduler. Select 1 Day, 1 Week, 2 Weeks, 1 Month, 3 Months, or 1 Year .