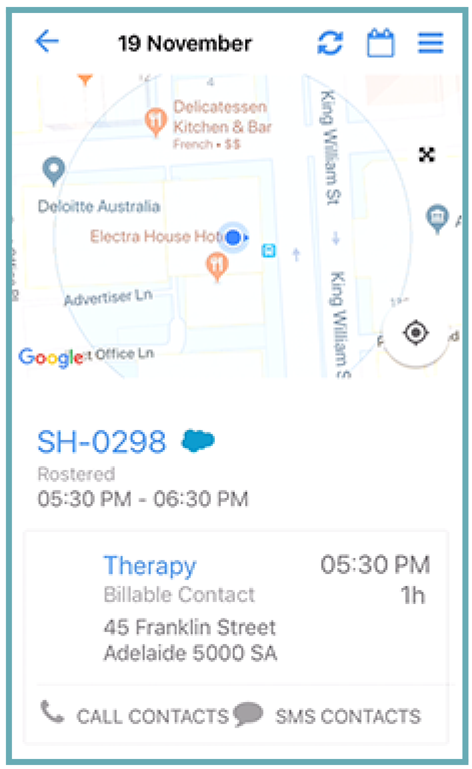
Lumary Legacy Mobile App User Guides



Get started with the Lumary mobile app

This article explains how to download, log into, verify and log out of the Lumary mobile app.

The Lumary mobile app provides a simple interface for workers to:
- view and accept shifts
- track their time against appointments, travel and transport
- record cancellations, and
- add client case notes.

The app operates through Salesforce. This means that you'll see Salesforce branding on login screens and while using some of the app's features.

Use these links to find out how to:
- download the app
- log in
- verify your identity
- allow access, and
- log out.

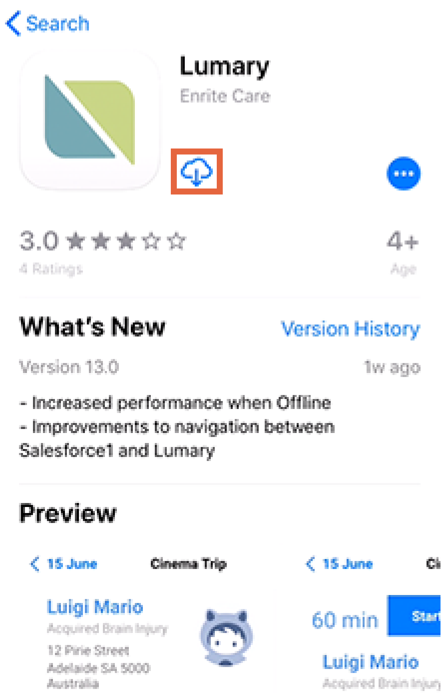
You may be able to expand your Lumary mobile experience by downloading and installing the Salesforce mobile app. You'll need your system administrator to **activate Salesforce integration for mobile**. Then you'll need to **download and install the Salesforce mobile app**

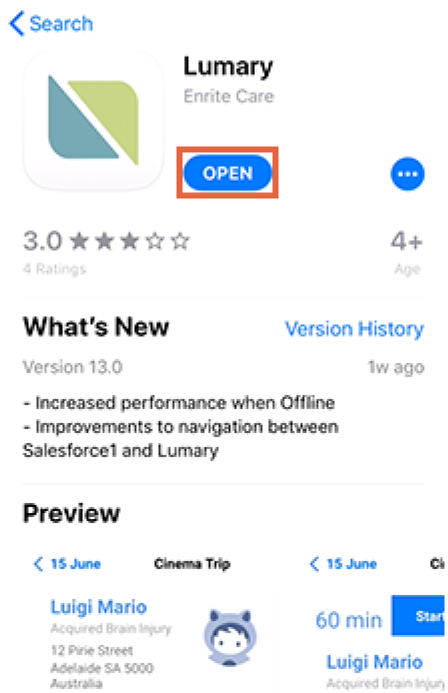
Download the app

To get started:

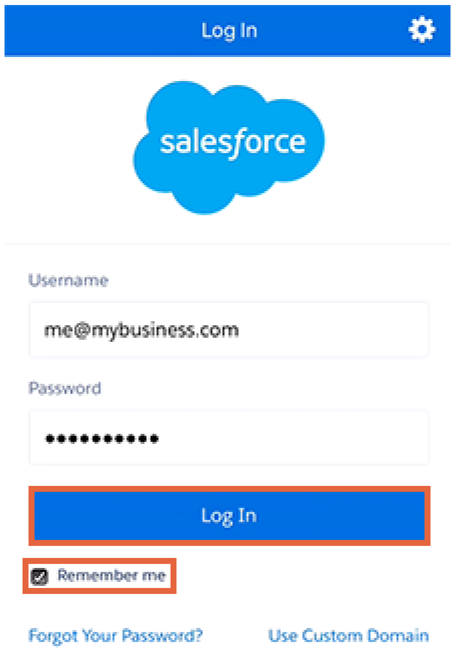
1. Make sure that you have access to the email account that has your username and password. You'll be sent an email as part of this process to verify your account.
2. Find the app on the iOs or Google Play app store. If you're viewing these instructions on your device, tap one of the links below:

3. Tap on the download button.
4. Tap on the open button.



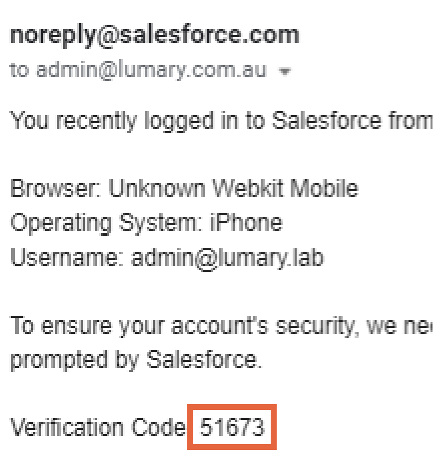


Log in

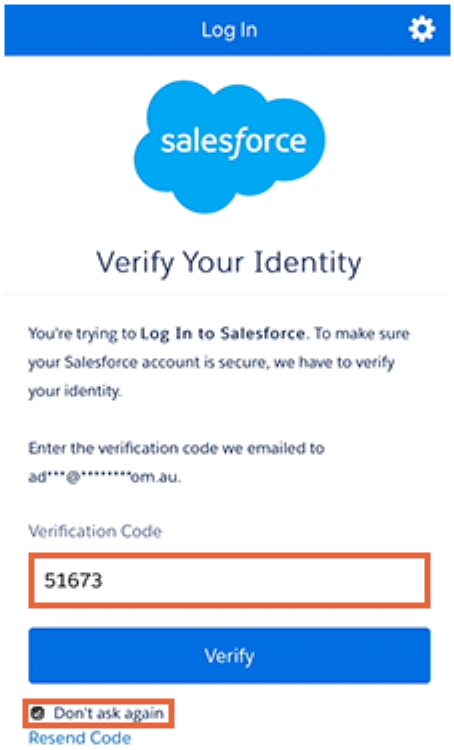


5. This will open a Salesforce login screen. Enter your Lumary username and password. Put a tick in the Remember me checkbox and the system will remember your username.
6. Tap on the Log In button.

Verify your identity

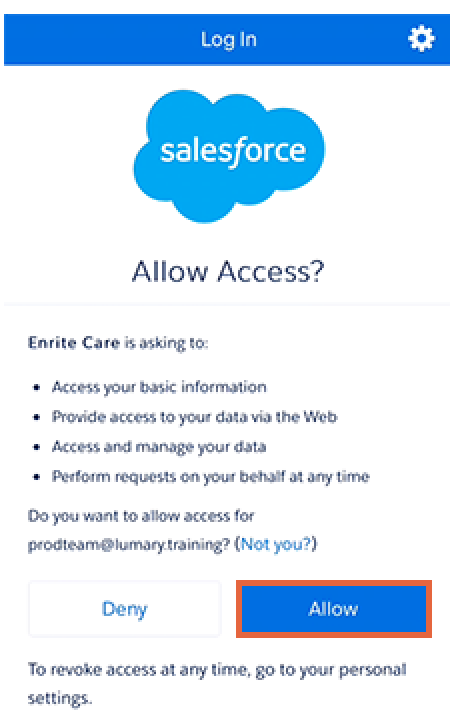


7. If this is the first time you're logging in, you may be required to verify your identity. You'll need to navigate to the email account where you were sent your log in details.
8. Look for the Verification Code.

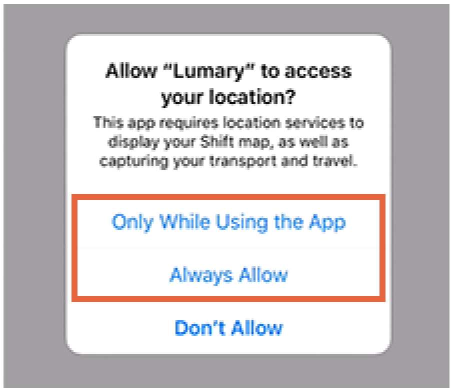


9. Navigate back to the Lumary app and enter the code.
10. Make sure there's a tick in the Don't ask again checkbox.
11. Tap on the Verify button.

Allow access

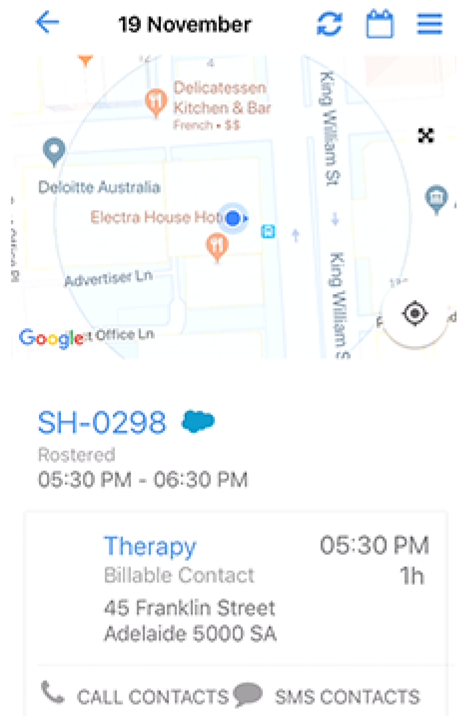


12. Salesforce will prompt you to allow access for either Enrite Care or Lumary. This will **allow your device to access information from your organisation's Lumary Salesforce environment**. It will not give Lumary or Salesforce access to personal information stored on your mobile device. Tap on the Allow button. The system will not let you log in if you tap Deny.



13. You may also be prompted to allow Lumary to access your location. This enables the app to display the shift map, as well as capturing transport and travel. We recommend that you select either Only While Using the App or Always Allow.

14. As you're logging in, you may see a Lumary loading screen.
15. You'll then be taken to your home screen. Depending on your settings, this will show your location and any shifts you have today.

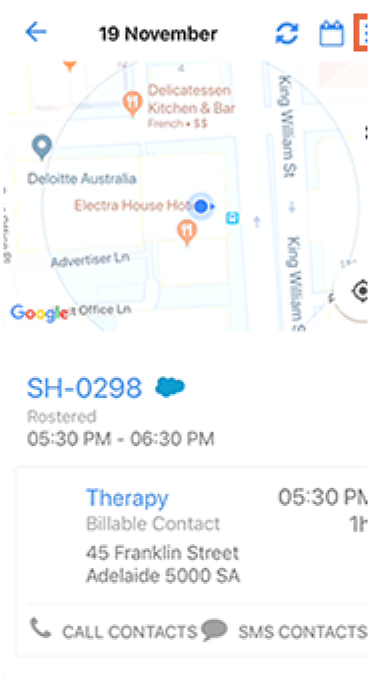


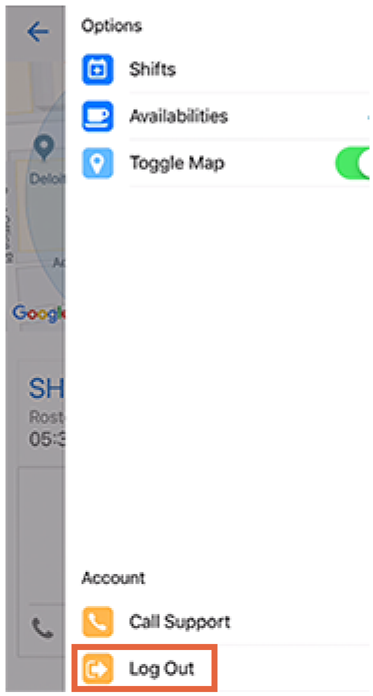
Log out

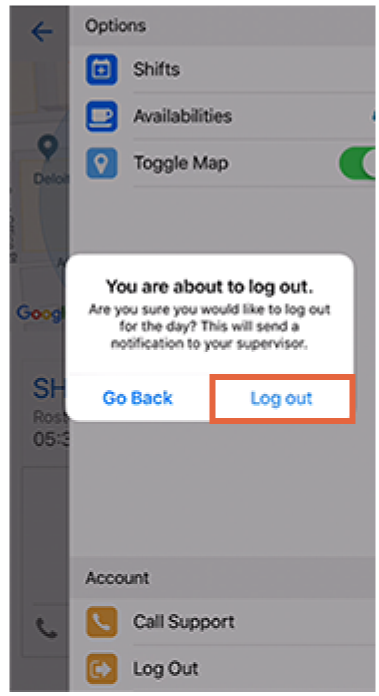
We recommend that you log out once you've finished using the app for the day.

To do this:

1. Navigate to the home page that lists your shifts and appointments. Tap on the menu icon at the of the screen.
2. Tap on the Log Out button at the bottom of the screen.
3. Tap on Log out to confirm that you've finished using the app.







Download and install the Salesforce mobile app

This article explains how to download, log into and verify the Salesforce mobile app, which provides expanded features for the Lumary mobile app.

By integrating with the Salesforce mobile app, users of the Lumary mobile app can gain access to additional features and functionality. This includes access to more information about the clients that they're working with. To access this functionality, your system administrator will need to **activate Salesforce integration for mobile**.

Use these links to find out how to:

- download the app
- log in
- verify your identity, and
- allow access.

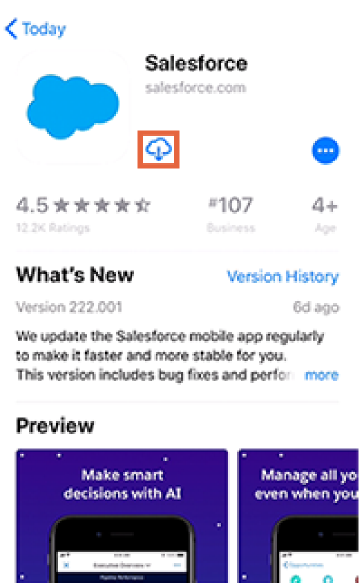
Download the app

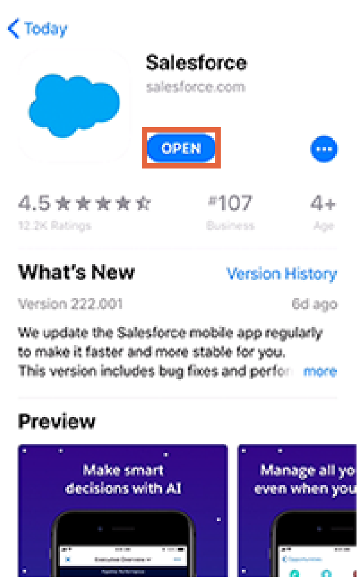
To get started:

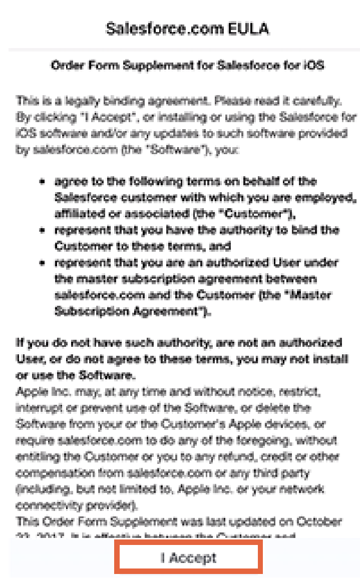
1. Make sure that you have access to the email account that has your username and password. You'll be sent an email as part of this process to verify your account.
2. You can download and install the Salesforce app from within the Lumary mobile app by clicking on features marked with the Salesforce icon. Alternatively, you can find the app on the iOs or Google Play app store. If you are viewing these instructions on your device, tap one of the links below:

Download on the App Store   GET IT ON Google Play

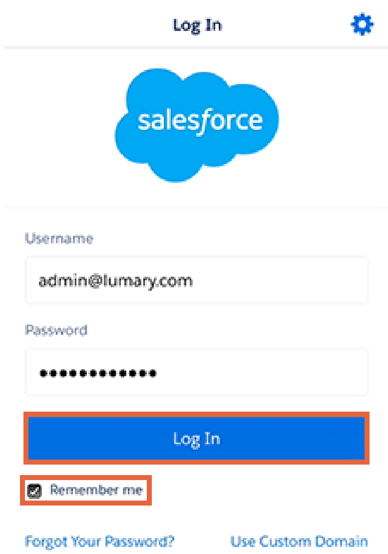
3. Once you locate the Salesforce app, tap on the download button. You may be prompted to sign into your Apple or Google account to proceed.
4. Tap on the open button.
5. Click on the I Accept button to accept the terms of Salesforce's end user license agreement (EULA).







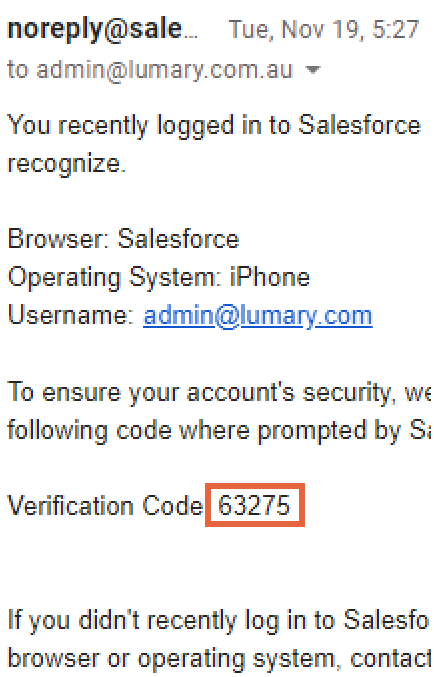
Log in

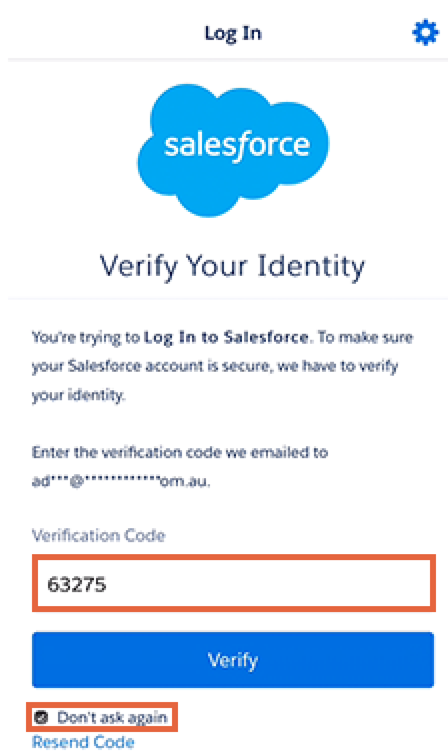


6. This will open a Salesforce login screen. Enter your Lumary username and password. Put a tick in the Remember me checkbox and the system will remember your Username.
7. Tap on the Log In button.

Verify your identity

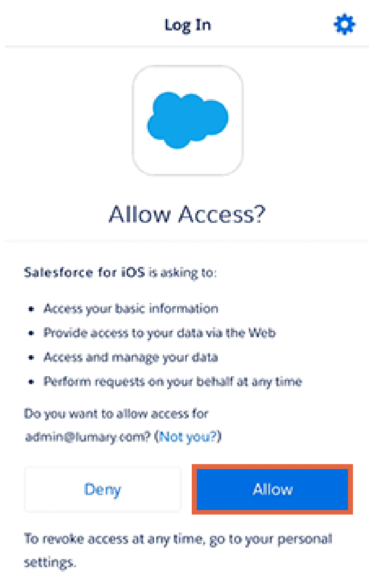
8. If this is the first time you're logging in, you may be required to verify your identity. You'll need to navigate to the email account where you were sent your log in details.
9. Look for the Verification Code.
10. Navigate back to the Salesforce mobile app and enter the code.
11. Make sure there's a tick in the Don't ask again checkbox.
12. Tap on the Verify button.

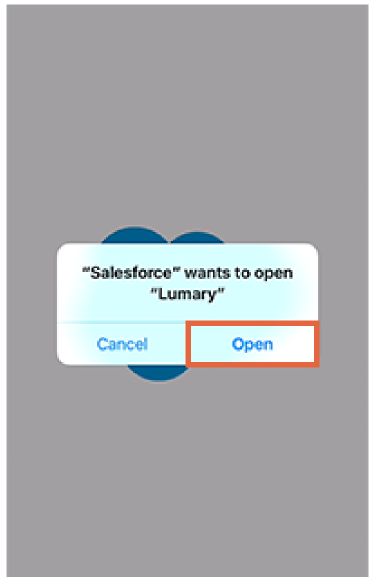


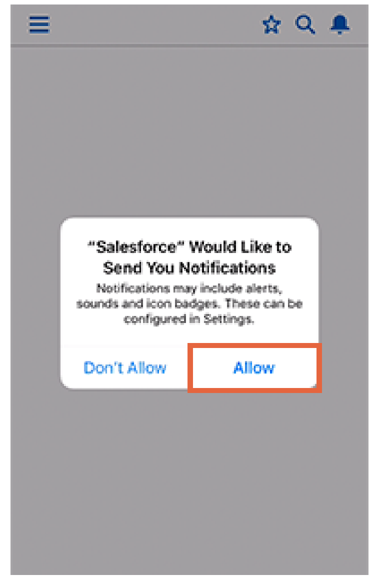


Allow access

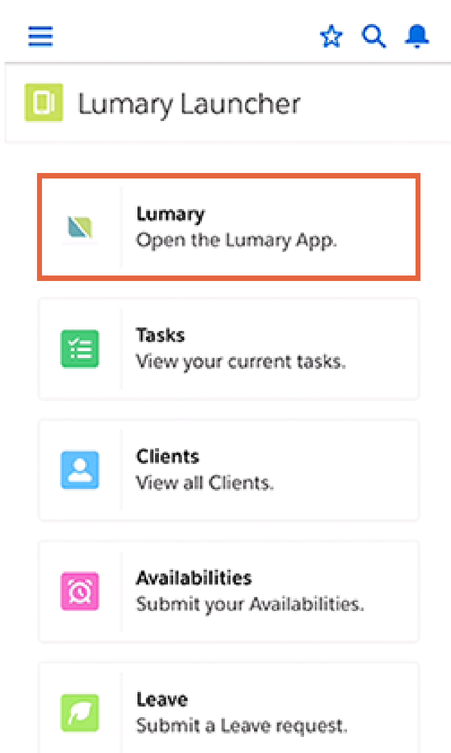
13. Salesforce will prompt you to allow access for either Enrite Care or Lumary. This will allow your device to access information from your organisation's Lumary Salesforce environment. It will not give Lumary or Salesforce access to personal information stored on your mobile device. Tap on the Allow button. The system will not let you log in if you tap Deny.
14. You may be prompted to allow Salesforce to open Lumary. Tap on Open.
15. You may also be prompted to allow Salesforce to send you notifications. Tap Allow.







16. You should then arrive at the Lumary Launcher. Tap on Lumary to open the Lumary mobile app.



Accept or decline shifts

This article explains how to use the mobile app to accept or decline one or more shifts.
If you are unable to accept or decline shifts, you may need to request that your system administrator activate shift acceptance.

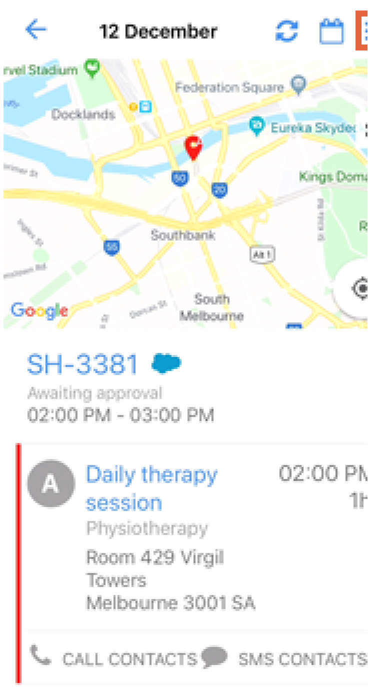
Use these links to find out how to:

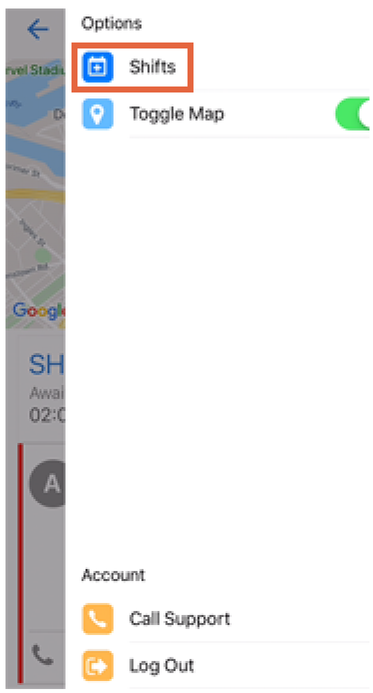
- navigate to upcoming shifts
- accept or decline all shifts awaiting approval
- accept individual or specific shifts, and
- decline individual or specific shifts.

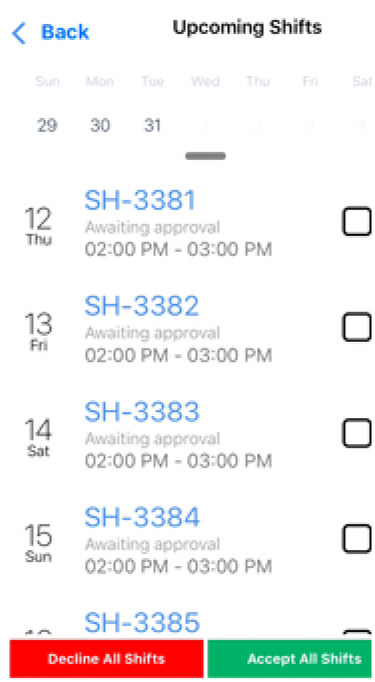
Navigate to upcoming shifts

To see upcoming shifts that are awaiting your approval, log into the mobile app. Then, from your home screen:

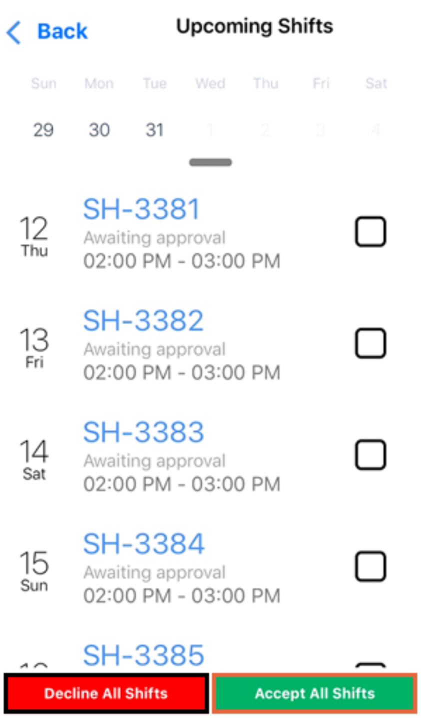
1. Tap on the menu icon.
2. Tap on the Shifts button.
3. This will list your upcoming shifts with an empty checkbox next to all of the shifts waiting for your response. You may need to swipe up to see all of your shifts.







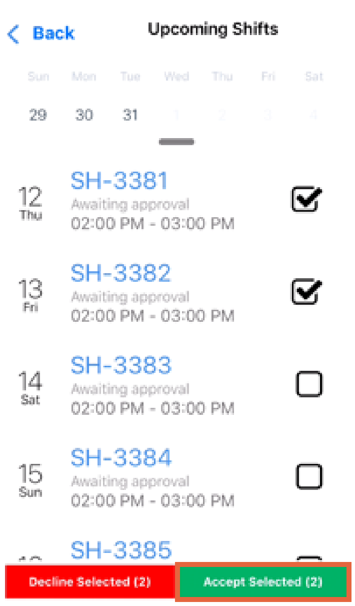
Accept or decline all shifts

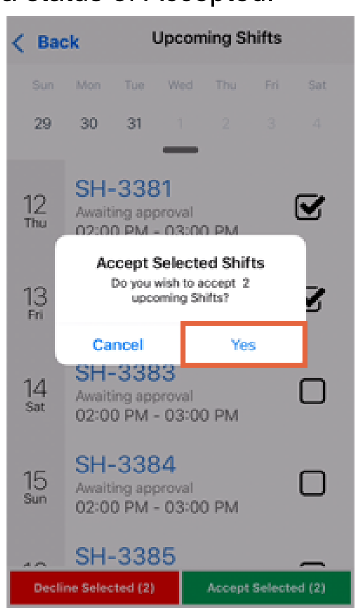


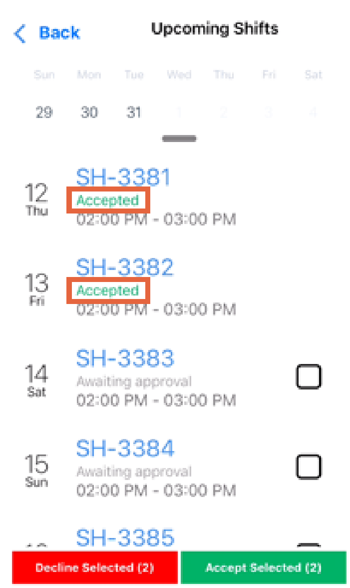
4. You can accept or decline all of your shifts that are awaiting approval by tapping on either the Decline All Shifts or Accept All Shifts button.

Accept individual or specific shifts

5. You can also accept or decline individual or specific shifts by putting a tick in the relevant checkboxes.
6. Once you've made your selections, you can tap on Accept Selected to accept.
7. Tap on Yes to confirm.
8. Your shifts will now have a status of Accepted.

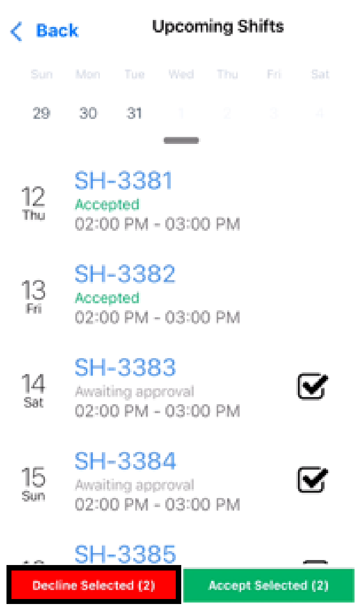


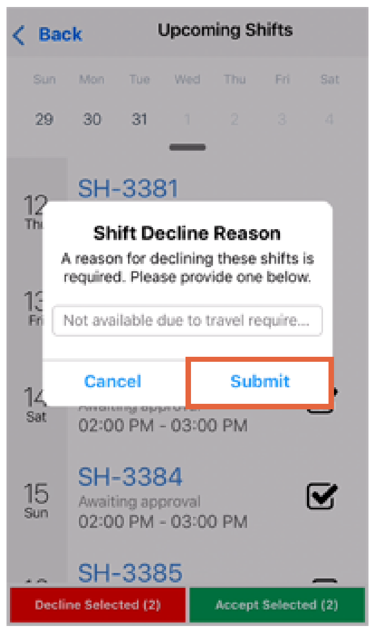


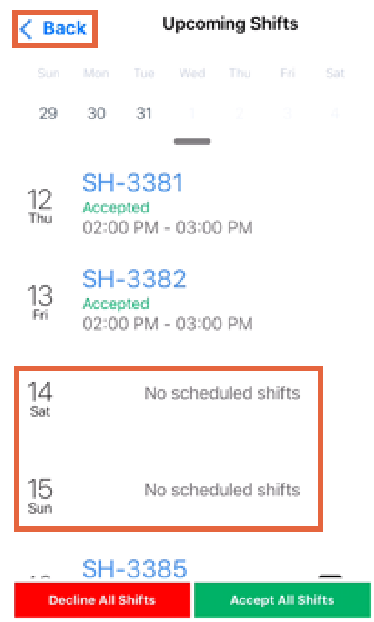


Decline individual or specific shifts

9. The process for declining individual or specific shifts is similar to accepting. First, put a tick in the relevant checkboxes.
10. Then click on the Decline Selected button.
11. You'll be prompted to add a reason for declining the shifts. If you have different reasons for different shifts, you may need to decline those shifts separately. Once you've added your reason, tap on the Submit button.
12. The declined shifts will be removed from your list of upcoming shifts.
13. To go back to your home screen, tap on Back.





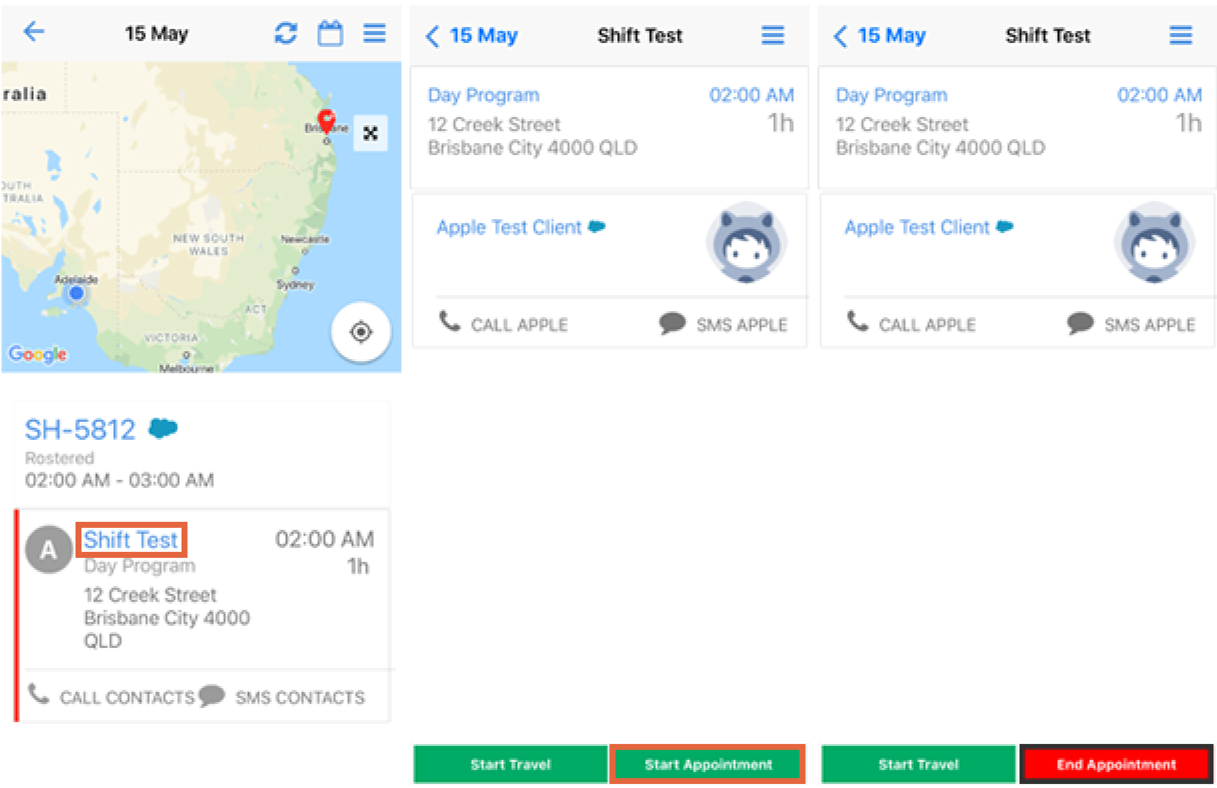


Start a shift

This article explains how to use the mobile app to start a shift.

A shift is automatically started when you start the first appointment of the shift. So, to start a shift:

1. Navigate to the shift.
2. Click on the name of the first appointment.
3. Click on the Start Appointment button.
4. This will start your shift and activate the End Appointment button.



Ending an appointment does not end your shift. Find out more about how to [end a shift](#).

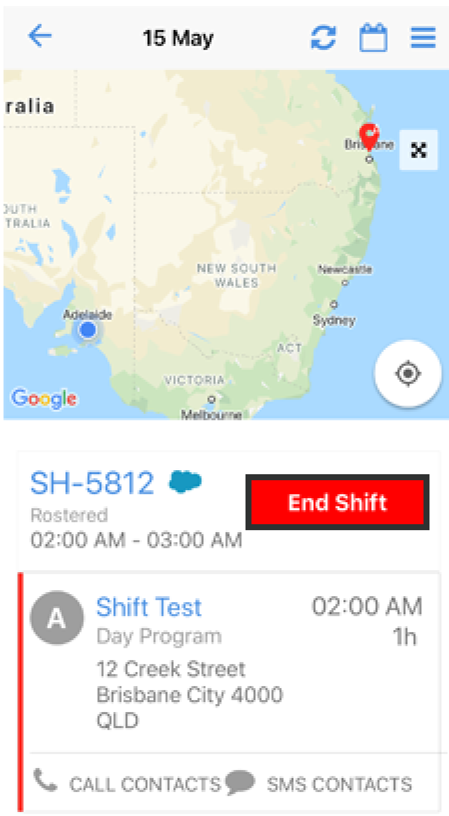
End a shift

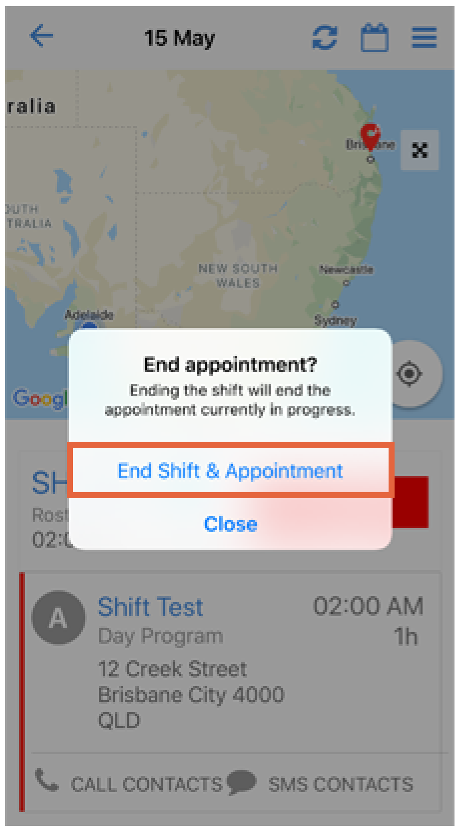
This article explains how to use the mobile app to end a shift, as well as any incomplete appointments relating to that shift.

When you end a shift , you may be prompted to complete your remaining appointments. You'll also be able to adjust the end time if you're using the app later than the actual time that your shift finished.

To end a shift:

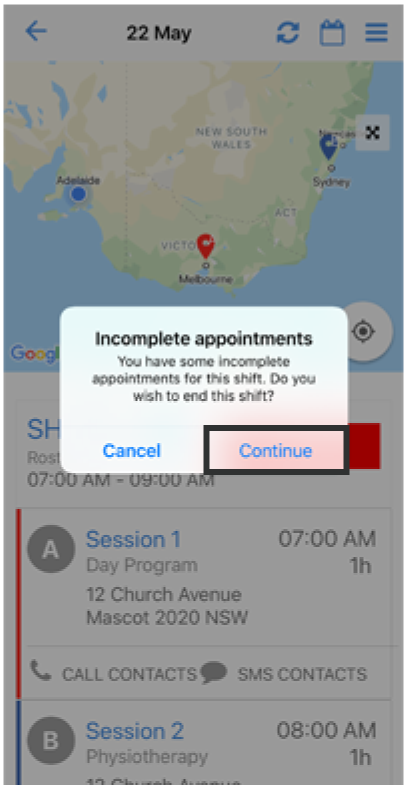
1. Navigate to the current shift.
2. Tap on the End Shift button.
3. If you've already ended all of your appointments, you'll be taken straight to the Shift Overview screen.
4. If you have one open appointment, you'll be prompted to end it. Click on End Shift & Appointment to go to the Shift Overview screen.

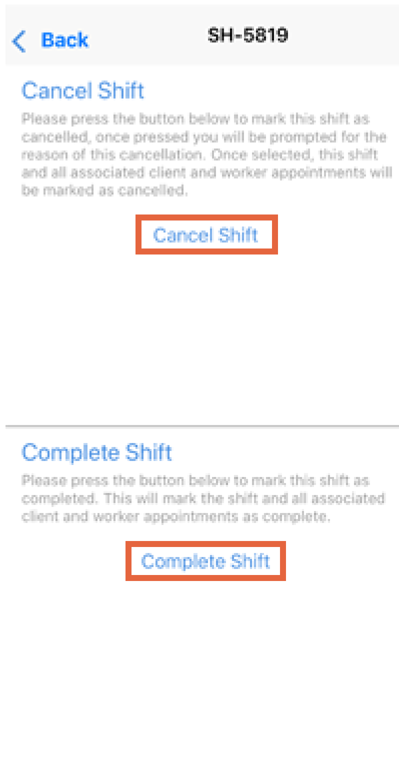


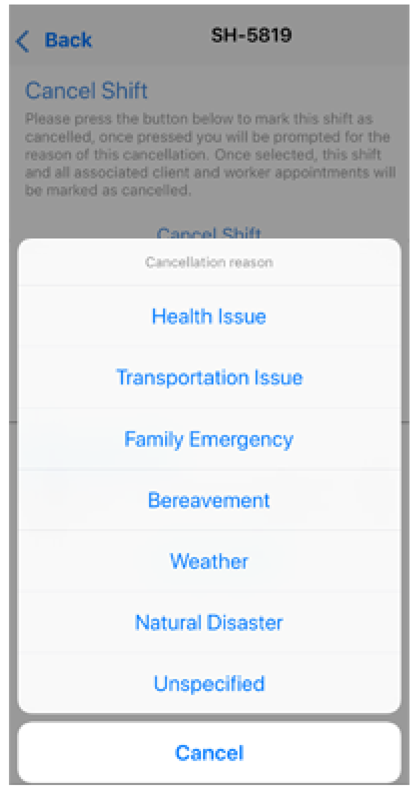


Multiple open appointments

5. If you have multiple open appointments, you'll be notified that multiple appointments are open. To close them automatically, click on Continue.
6. You'll be prompted to either cancel the shift, or set it to complete. If you click on Cancel Shift, you'll need to add a Cancellation reason.
7. Click on Complete Shift to go to the Shift Overview screen.

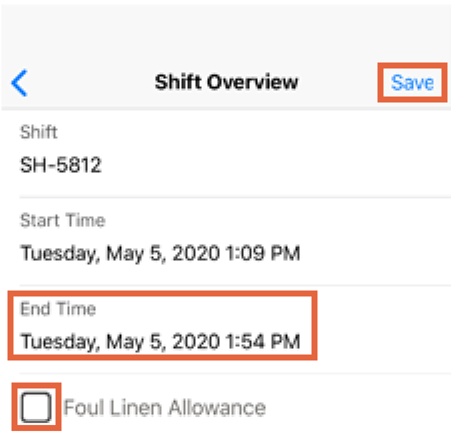


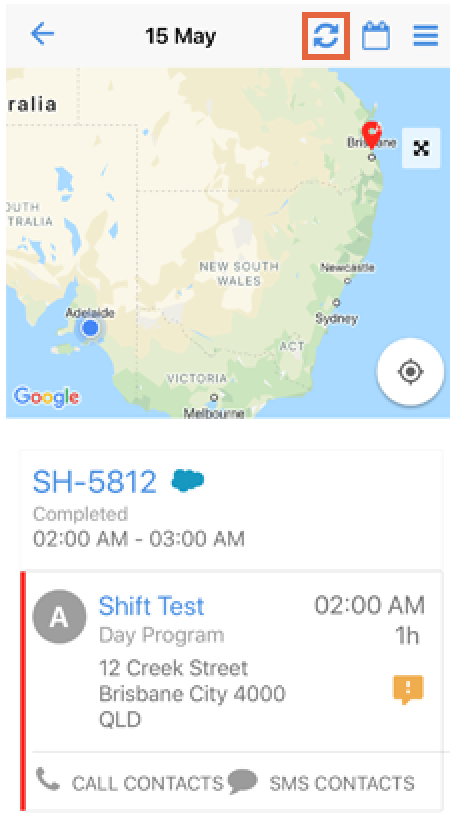




Shift overview

8. On the Shift Overview screen, you'll be prompted to finalise your shift. The Start Time will be locked to the time you started your shift. You can click on the End Time if you need to adjust it.
9. If you have a foul linen allowance and your organisation has activated this feature, you'll also be able to put a tick in the Foul Linen Allowance checkbox.
10. Once you're happy with your settings, click on the Save button.
11. You may need to hit refresh to remove Start Appointment from any outstanding client appointments.



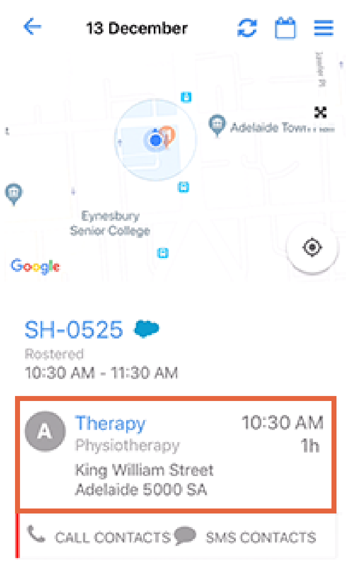


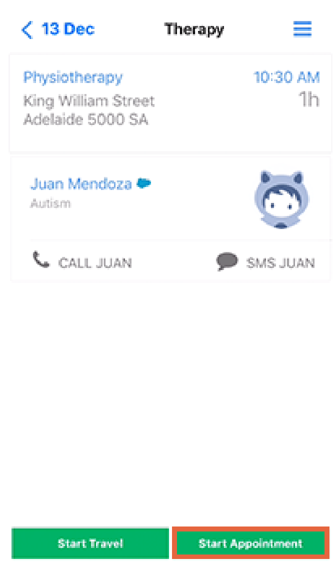
Track the amount of time spent at an appointment

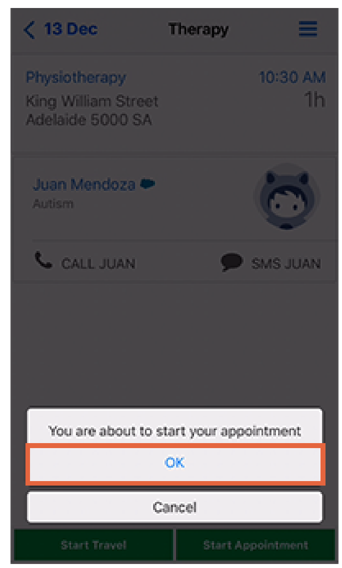
This article explains how to use the mobile app to track the amount of time you spend at an appointment.
You can use the mobile app to record the time that you start and end appointments. To track your appointment:

1. Tap on the relevant appointment panel on your home screen.
2. Tap on the Start Appointment button.
3. You'll be prompted to confirm the start of the appointment. Tap on OK.

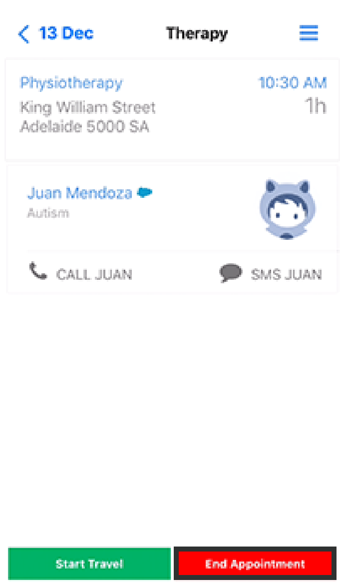
This will start recording the time for your appointment. If the start time of your shift matches the start time of the appointment, this will also start your shift.

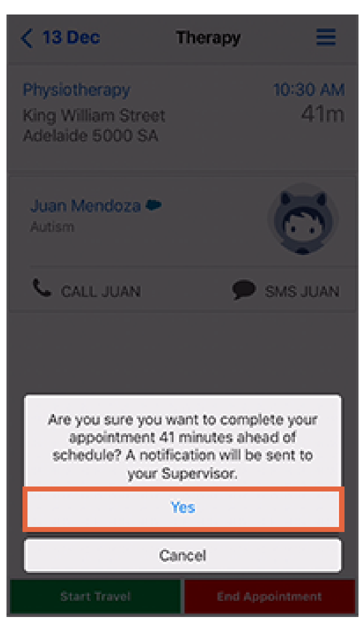


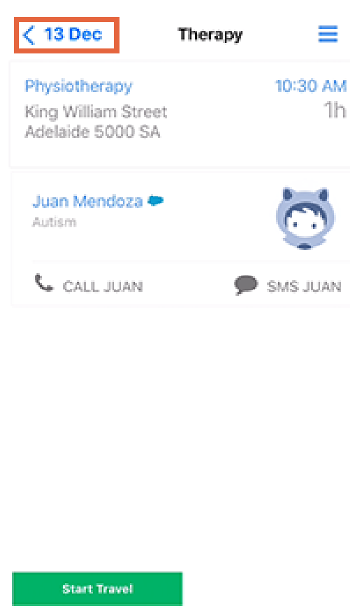


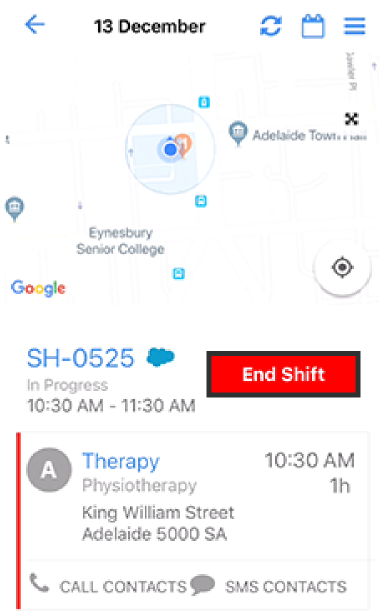


4. Once you've started your appointment, the End Appointment button will become available. At the end of the appointment, make sure you remember to tap on End Appointment.
5. If there is more than 30 minutes remaining on the scheduled amount of time for the appointment, the system will ask you to confirm that you're ready to end. Tap on Yes to confirm.
6. The End Appointment button will disappear. Tap on the back arrow or date to go back to your home screen.









If this was your last appointment of the day, you can tap on the End Shift button to end your shift.

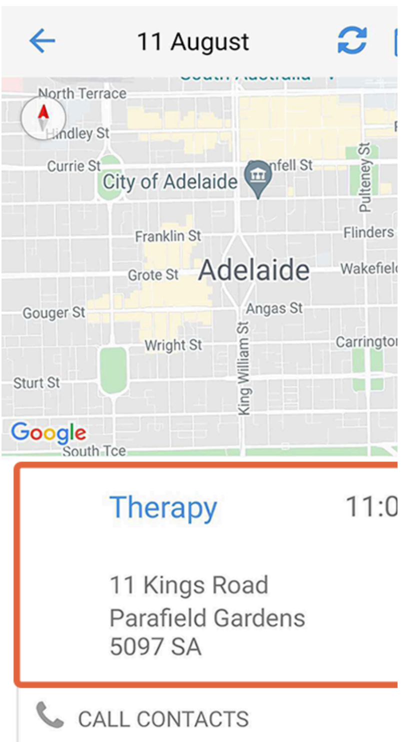
Track travel time to and from appointments

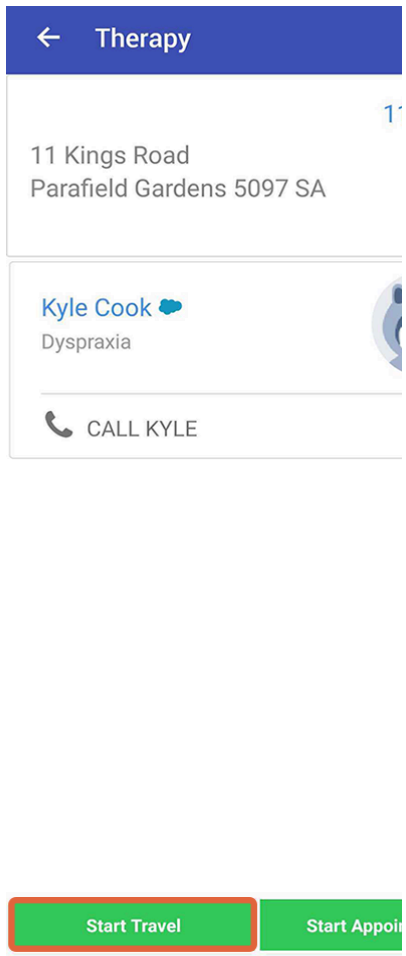
This article explains how to use the Lumary mobile app to track the time spent travelling to and from appointments.

You can use the mobile app to record the time and distance you travel to and from appointments. If [travel charges are allowed on the participant's service agreement]() and on the service being delivered, then service delivered (SD) records will also be created for travel.

The functionality described in this article requires version 18.8.7 of the Lumary mobile app.
To track travel to or from an appointment:

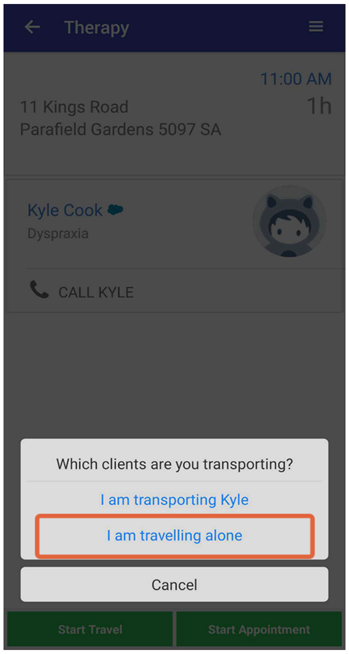
1. Tap on the relevant appointment panel on your home screen.
2. Tap on the Start Travel button.

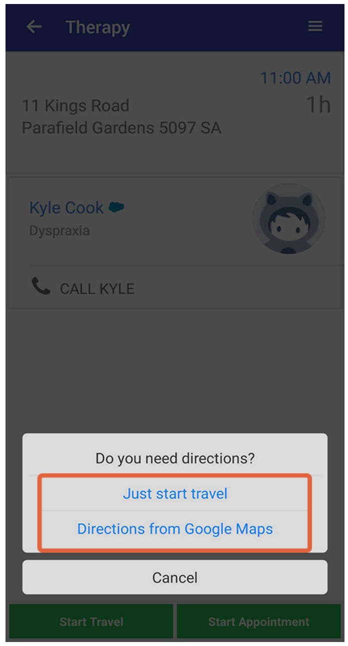




3. Tap I am travelling alone on the dialog that appears. If you're transporting a client, see [how to track transport for a single client](), or [how to track transport for a group of clients]().
4. Tap on Just start travel if you don't need directions to your destination, otherwise tap on Directions from Google Maps.

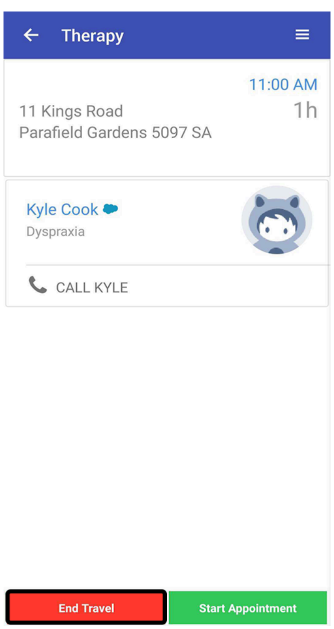
Tapping on the Directions from Google Maps option will open the Google Maps app and automatically map your current location to the appointment's address. Make sure you remember to come back to the Lumary app at the end of your journey.

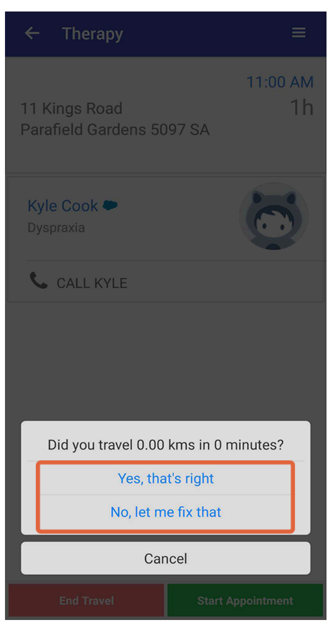


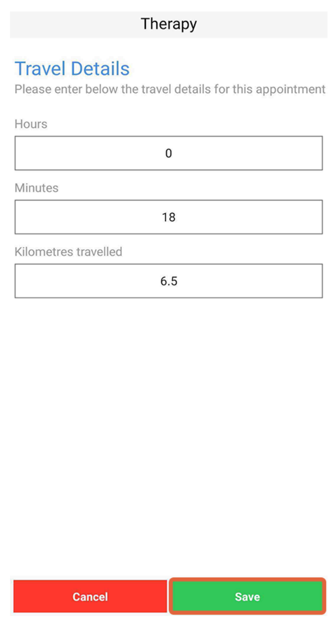


Once you've arrived at your appointment, tap on End Travel in the Lumary app.

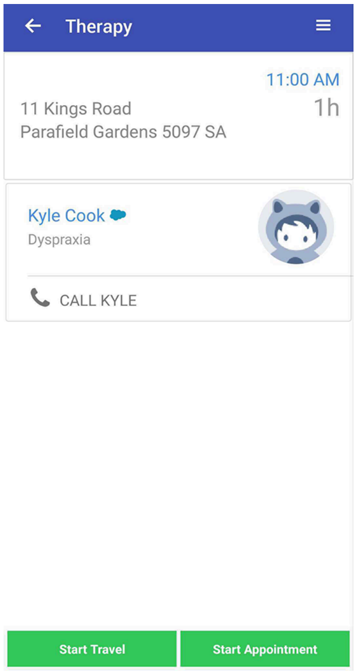
5. A message will appear that describes your journey's distance and time. Review these details and then confirm whether they are accurate. If you need to adjust them, tap on the No, let me fix that text link. If they're correct tap on the Yes, that's right text and skip to step 9.
6. If you tapped No, let me fix that then the Travel Details form will open. Tap on each of the fields you need to adjust and make your changes.
7. Once you're happy with your travel details, tap on the Save button. This will create your travel records.







8. You're now ready to start your appointment. The Start Travel button will continue to be available if you need to track any other travel or transport related to this appointment. This includes travel after you end the appointment.



After completing the appointment you'll need to [confirm your travel and transport details and apportion these costs]() if the service was delivered to multiple clients.

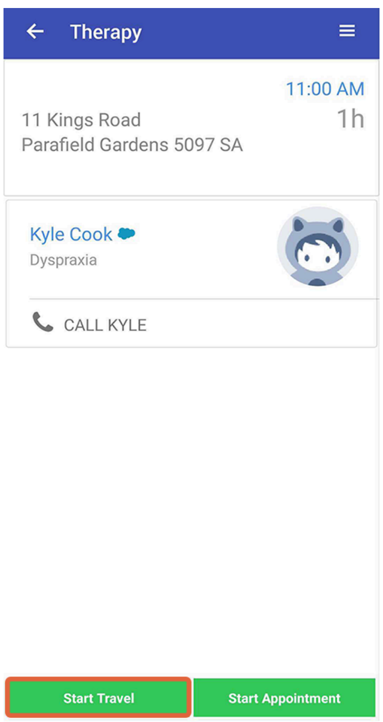
Track the transport of an individual client

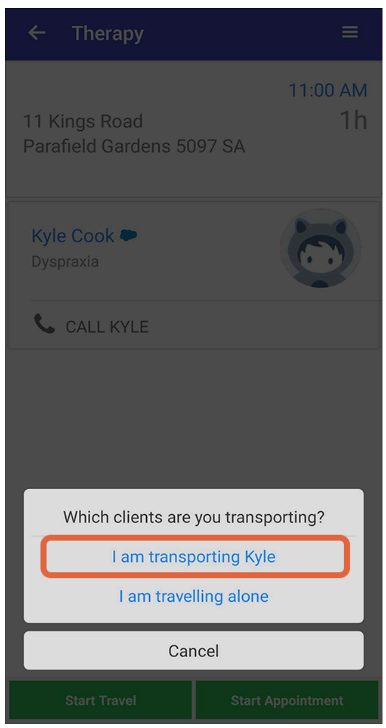
This article explains how to use the Lumary mobile app to track the transport of an individual client. If you're looking for instructions on [transporting a group of clients, see this article](#).

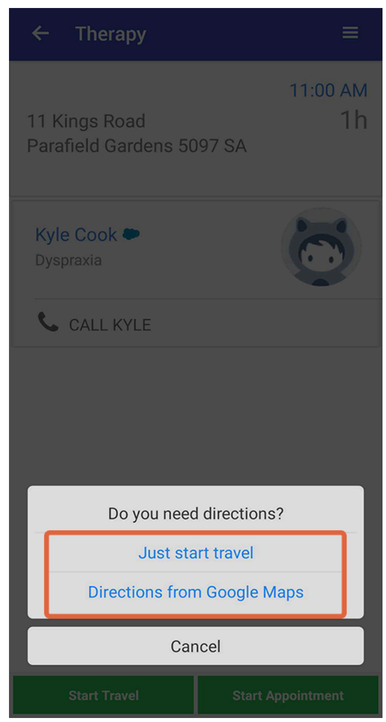
Under the NDIS, travel with a client is called transport. During an appointment, you may need to provide transport for one or more of your clients.

The functionality described in this article requires version 18.8.7 of the Lumary mobile app.
To track transport for an individual client:

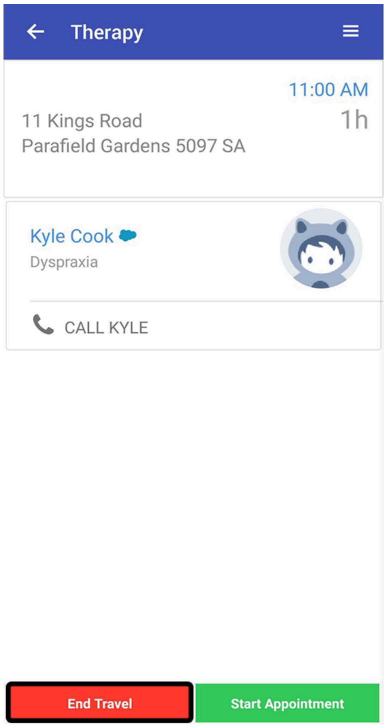
1. Start the appointment and tap on the Start Travel button.
2. If your appointment only has a single client, you'll be prompted to indicate whether you're travelling alone or transporting the client. Tap on the I am transporting... option.
3. You'll then be asked whether you need directions. Tapping on the Directions from Google Maps option will open the Google Maps app. Make sure you remember to come back to the Lumary app at the end of your journey.

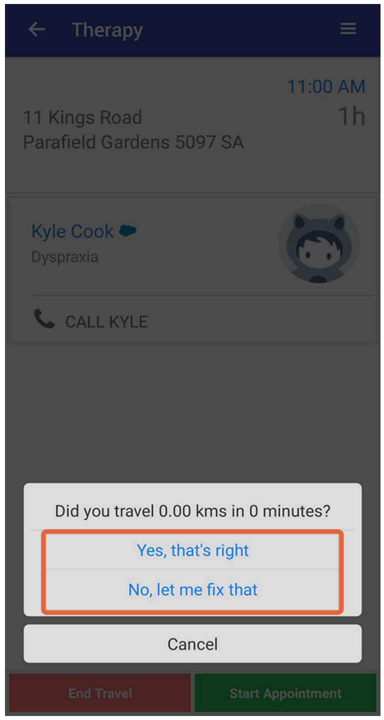


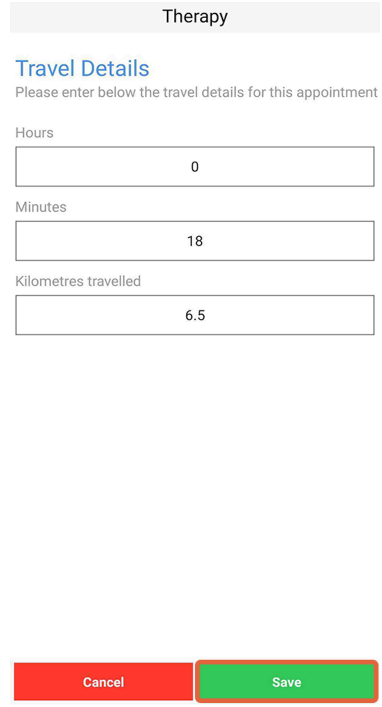




4. Once you arrive at your destination, tap on End Travel. If you were using Google Maps for directions, you may need to switch back to the Lumary app.
5. A dialog will appear that describes your journey's distance and time. Review these details and then confirm whether they are accurate. If you need to adjust them, tap on the No, let me fix that text link.
6. This will open the Travel Details form. Tap on each of the fields you need to adjust and make your changes.
7. Once you're happy with your travel details, tap on the Save button. You'll have one more opportunity to review all travel and transport details at the end of the appointment.







8. The Start Travel button will continue to be available if you need to track any other travel or transport related to this appointment.

Before you end the appointment, you'll be asked to confirm all of the travel and transport details before the appointment is closed off. If you forget to record any travel or transport, you'll be able to add those details then.

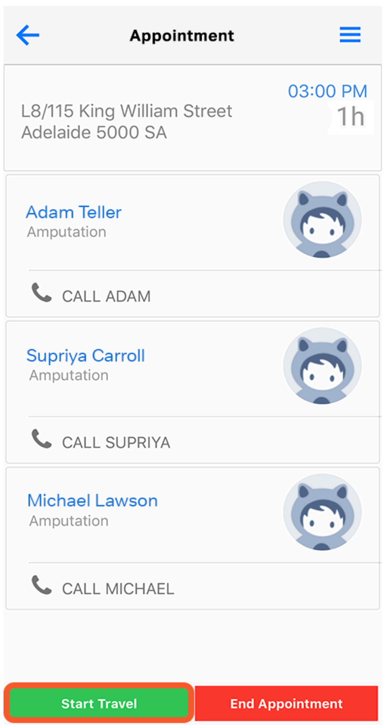
Track the transport of a group of clients

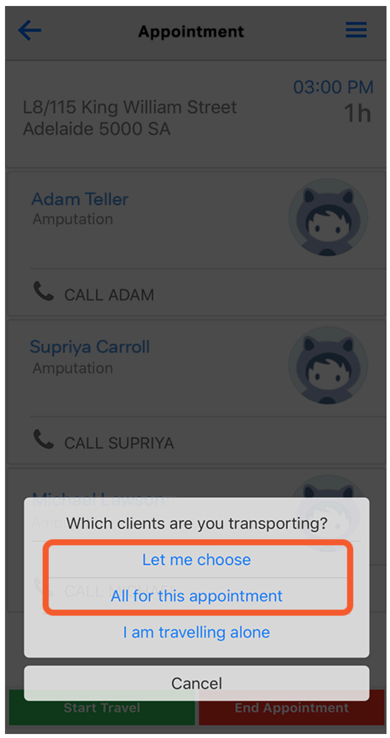
This article explains how to use the Lumary mobile app to track the transport of a group of clients. If you're looking for instructions on [transporting an individual client, see this article](#).

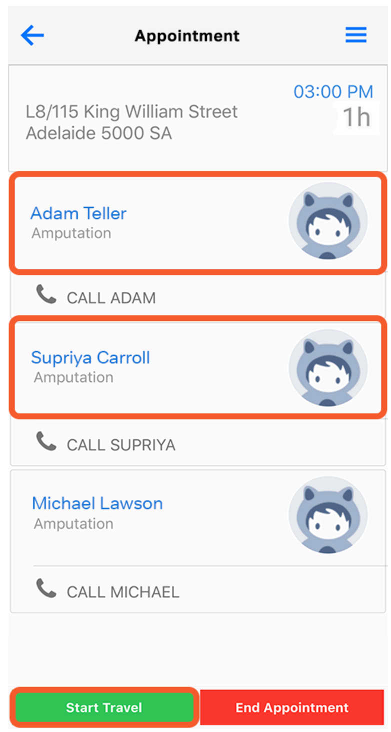
Under the NDIS, travel with clients is called transport. During an appointment, you may need to provide transport for a group of clients.

The functionality described in this article requires version 18.8.7 of the Lumary mobile app.
To track transport for a group:

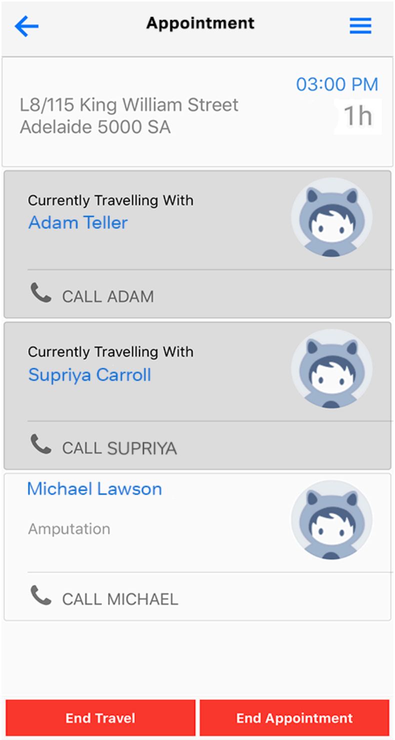
1. Start the appointment and tap on the Start Travel button.
2. If your appointment has more than one client, you'll be prompted to indicate which clients you are transporting. You can either tap on All for this appointment to automatically select all or Let me choose to indicate specific clients.
3. If you selected Let me choose, tap on the panel for each client you are transporting.

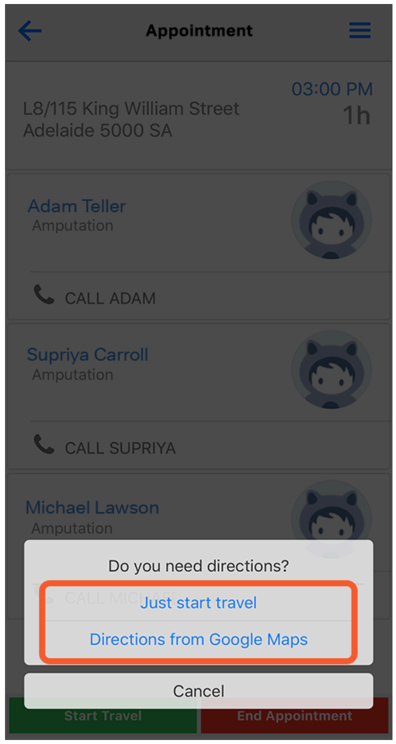




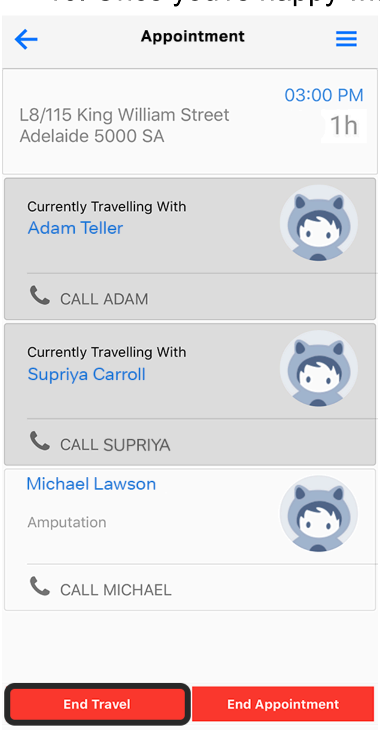


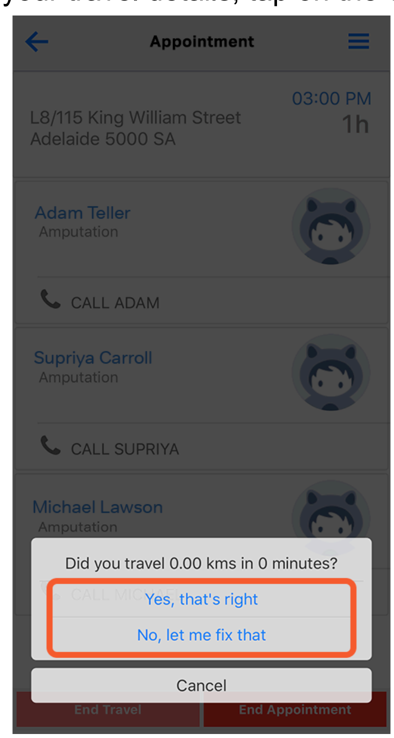
4. A notification of Currently Travelling With will be added to each client you select. Once you've added all of the clients you're transporting, tap on the Start Travel button.
5. You'll then be asked whether you need directions. Tapping on the Directions from Google Maps option will open the Google Maps app. Make sure you remember to come back to the Lumary app at the end of your journey.

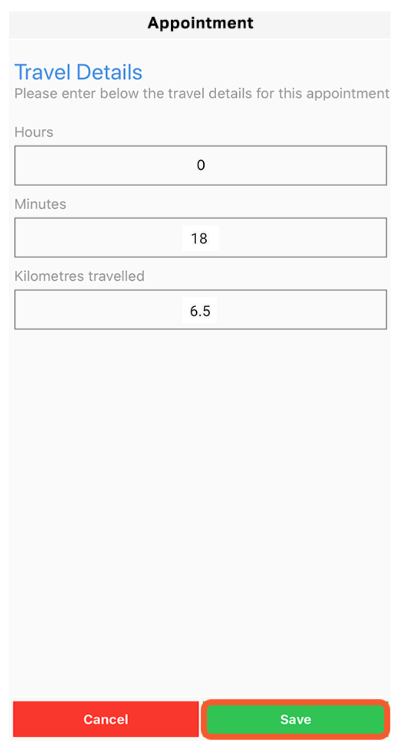




6. Once you arrive at your destination, tap on End Travel. If you were using Google Maps for directions, you may need to switch back to the Lumary app.
7. A dialog will appear that describes your journey's distance and time. Review these details and then confirm whether they are accurate. If you need to adjust them, tap on the No, let me fix that text link.
8. This will open the Travel Details form. Tap on each of the fields you need to adjust and make your changes.
9. Once you're happy with your travel details, tap on the Save button. You'll have one more opportunity to review all travel and transport details at the end of the appointment.
10. Once you're happy with your travel details, tap on the Save button.







11. The Start Travel button will continue to be available if you need to track any other travel or transport related to this appointment.

Before you end the appointment, you'll be asked to review all of the travel and transport details before the appointment is closed off. If you forget to record any travel or transport, you'll be able to add those details then.

Confirm travel, transport and apportionment details when ending an appointment

This article explains how to confirm travel and transport times and distances, as well as apportion these if they were delivered to a group of clients.

The functionality described in this article requires version 18.8.7 of the Lumary mobile app.
After you tap the End Appointment button, you'll be directed to a form to confirm your travel, transport and apportionment details. This article splits the form into two sections:

- travel and transport, and
- apportionment.

Confirm travel and transport details

If you recorded any travel or transport during the appointment, then these details will already be in the form, along with any details that were entered if it was a planned service. You'll need to check each entry to make sure that it's correct and assigned to the right place (Travel To, Transport with Client or Travel From).

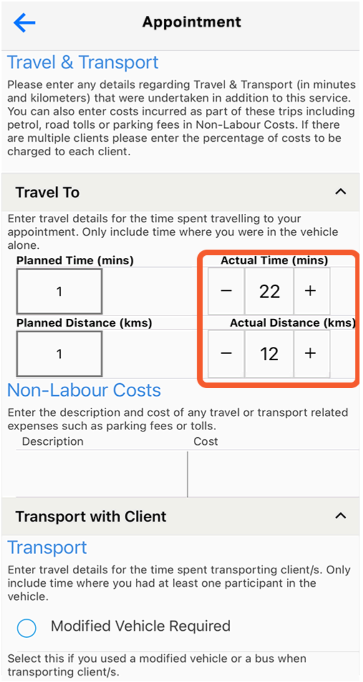
To edit and confirm travel and transport details:

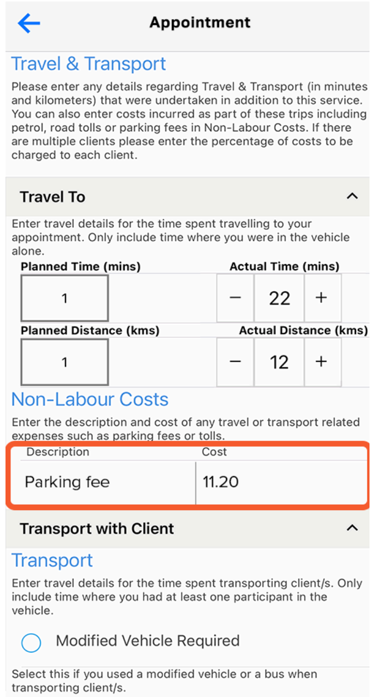
1. Check the time and distance values in the boxes on the right side of each of the Travel To, Transport with Client and Travel From sections.
2. If any of these values are incorrect or weren't recorded, change them by either using the + or - buttons on either side of each field, or by tapping on each field and typing in the value.

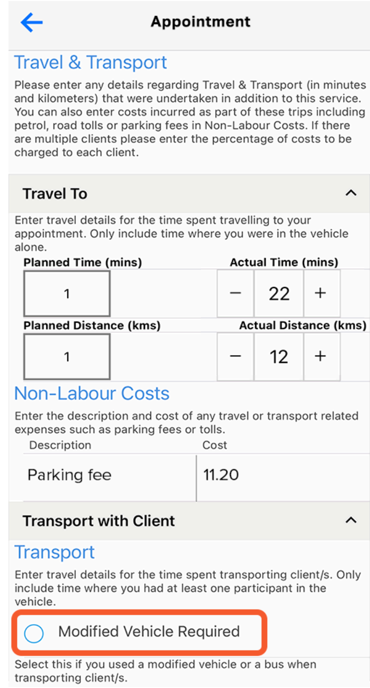
Planned travel and transport

The Planned Time (mins) and Planned Distance (kms) fields will only appear if your organisation allows planned travel and transport. If any planned travel or transport has been set for this appointment, it will appear in the fields on the left column of each section. These values won't automatically be used to create service delivered (SD) records if the Actual Time and Actual Distance fields are available. The Planned values must be manually written into the Actual fields for SD records to be created for these values.

3. If any non-labour costs were incurred, tap on the Description field in the Non-Labour Costs part of the relevant section to add details of these costs.
4. Tap the Modified Vehicle Required radio button if a modified vehicle was used to transport a client.







5. If you need to apportion travel and transport costs between clients, continue to the apportion travel and transport costs section below, otherwise, tap on the Save button to save these details and close off the appointment.

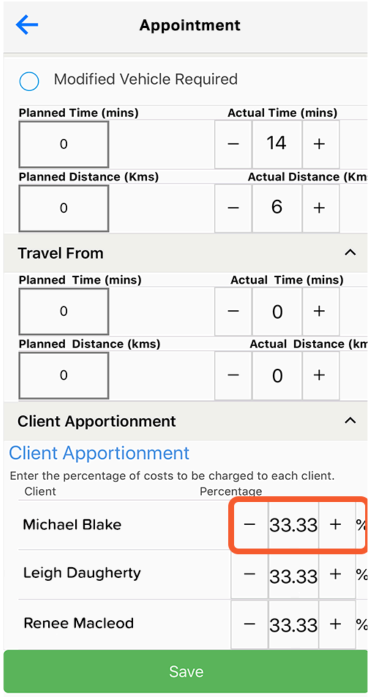
Once you save this form you won't be able to make any further changes to the appointment from your mobile device. Make sure all details are recorded correctly before you tap Save.

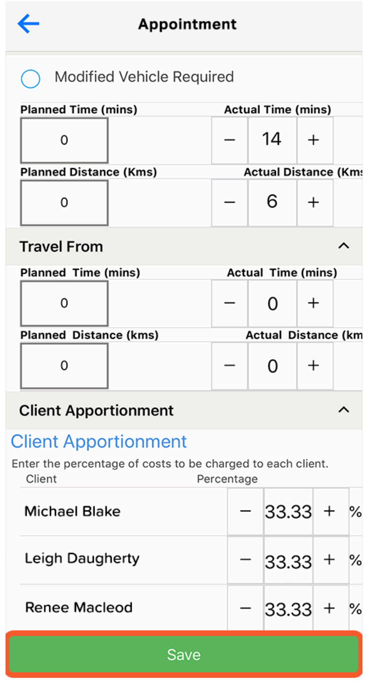
Apportion travel and transport costs

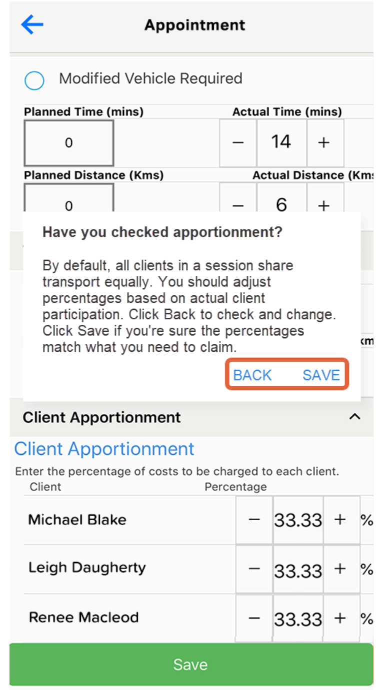
If the service was delivered to multiple clients, then the travel and transport costs can be apportioned between them using the Client Apportionment section. As a default, costs will be apportioned evenly between all clients, but you can change this by:

6. Using the + or - buttons on either side of each field, or by tapping on each field and typing in the new value.
7. Once all values are correct, tap on the Save button to save these details and close off the appointment.
8. When you see the Have you checked apportionment? prompt, tap Back if you want to check or amend the apportionment details or Save if you wish to proceed.

Once you save this form you won't be able to make any further changes to the appointment from your mobile device. Make sure all details are recorded correctly before you tap Save.







A note on apportionment in mobile

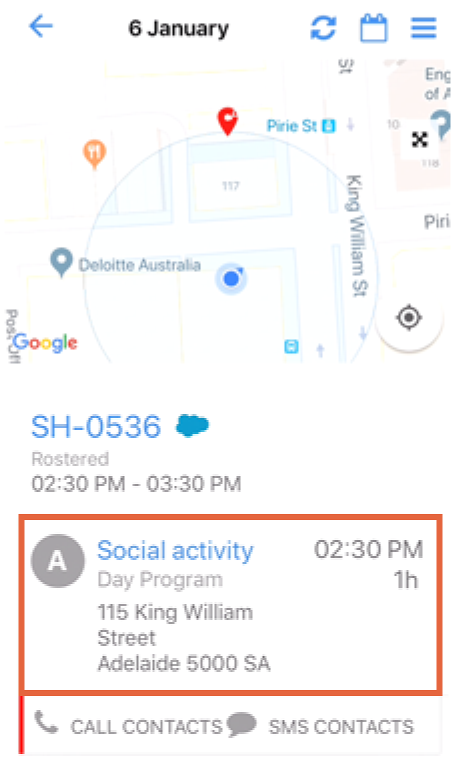
In the Lumary mobile app, it's currently only possible to alter the apportionment of travel and transport, not the primary service being delivered. The service apportionment is defined when setting up the service in Sessions and will automatically be split according to the scheduled amount.

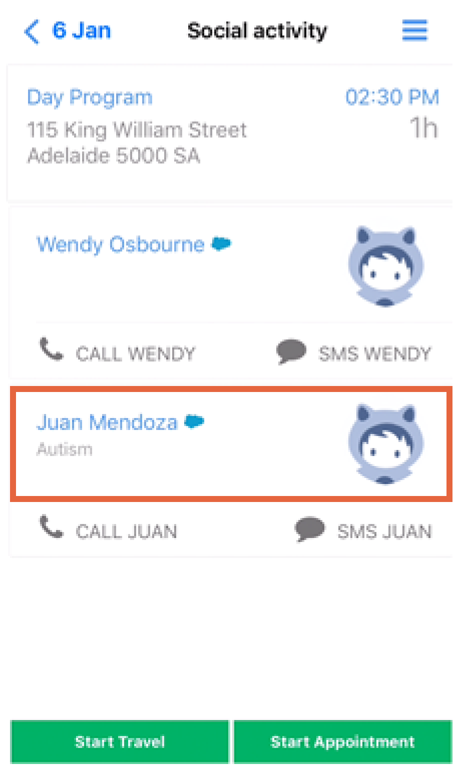
Cancel a client's appointment

This article explains how to use the mobile app to cancel an appointment that a client is unable to attend.

To record that a client has cancelled their appointment:

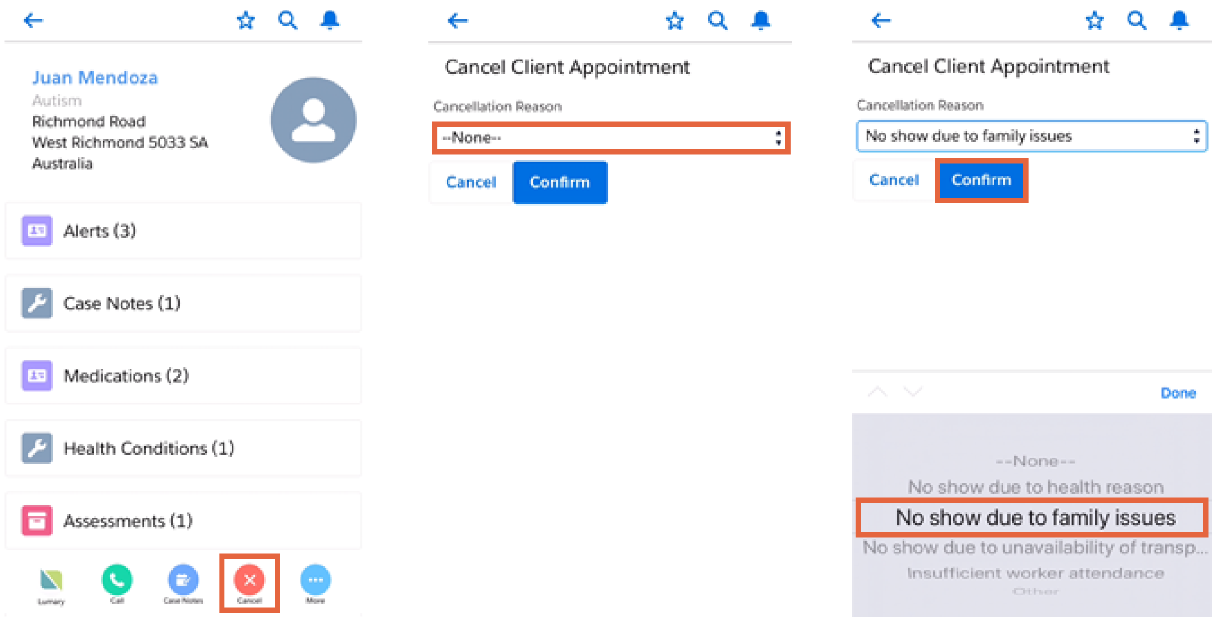
1. Navigate to the scheduled date of the appointment and tap on the relevant appointment panel.
2. Tap on the name of the client.



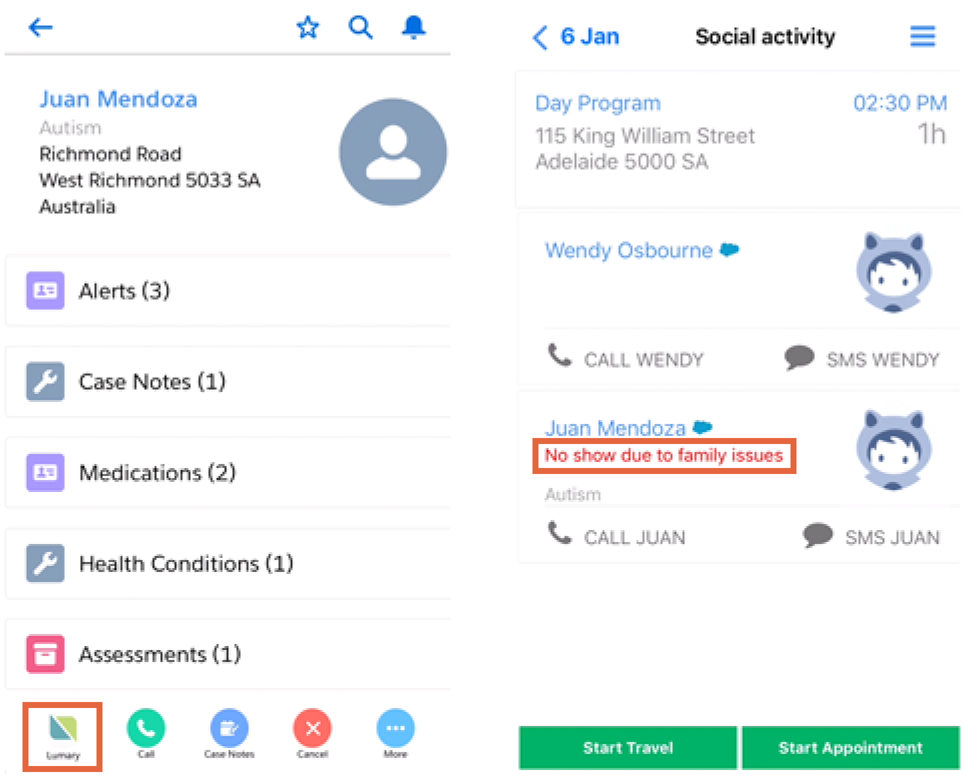


This will open Salesforce. If you don't have Salesforce integration, the steps will be slightly different. Skip ahead to learn how to cancel an appointment without Salesforce.

3. Tap on the Cancel icon at the bottom of the screen.
4. Tap in the picklist and select a reason for the cancellation. To claim the cancellation under the NDIA, you'll need to select:
    1. No show due to health reason
    2. No show due to family issues
    3. No show due to unavailability of transport, or
    4. Other
5. Tap on the Confirm button.



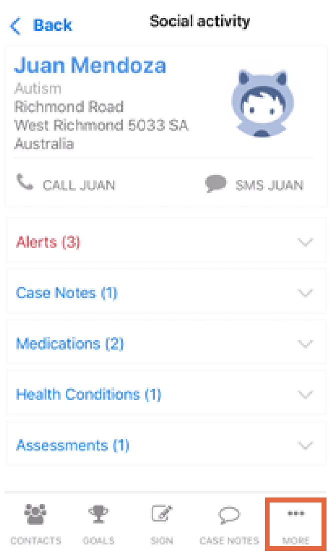
6. Tap on the Lumary icon to go back to the appointment. You may need to swipe up to reveal the menu panel at the bottom of the screen.
7. The client's panel will now list the cancellation reason. If the cancellation is claimable, it will be included on the relevant service delivery entry.

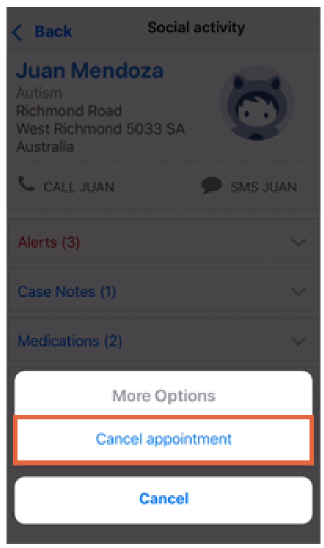


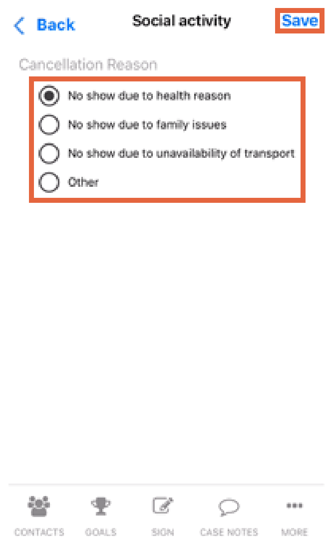
Cancel an appointment without Salesforce

If you're not using Salesforce integration, once you've navigated to the client's record:

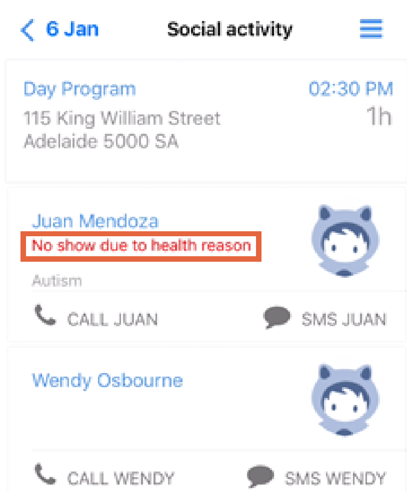
1. Tap on the More icon at the bottom of the screen.
2. Tap on the Cancel appointment text link.
3. This will open a list of reasons for the cancellation. To claim the cancellation under the NDIA, you'll need to select:
    1. No show due to health reason
    2. No show due to family issues
    3. No show due to unavailability of transport, or
    4. Other
4. Once you've selected a reason, tap on the Save button.







5. The client's panel will now list the cancellation reason. If the cancellation is claimable, it'll be included on the relevant service delivery entry.



Clock off outstanding shifts

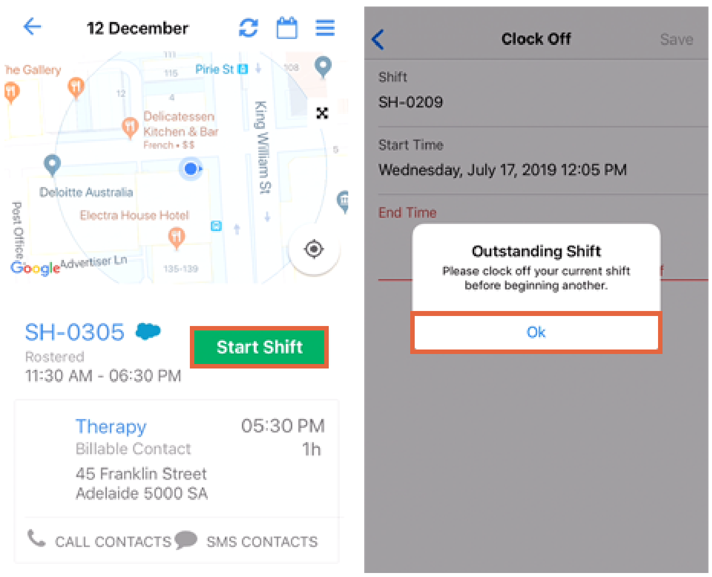
This article explains how to use the mobile app to clock off an outstanding shift that is blocking the start of a new shift.

Sometimes, you might forget to record the end of a shift. To help maintain the accuracy of your records, the system will prevent you from starting a new shift if you have any that are outstanding.

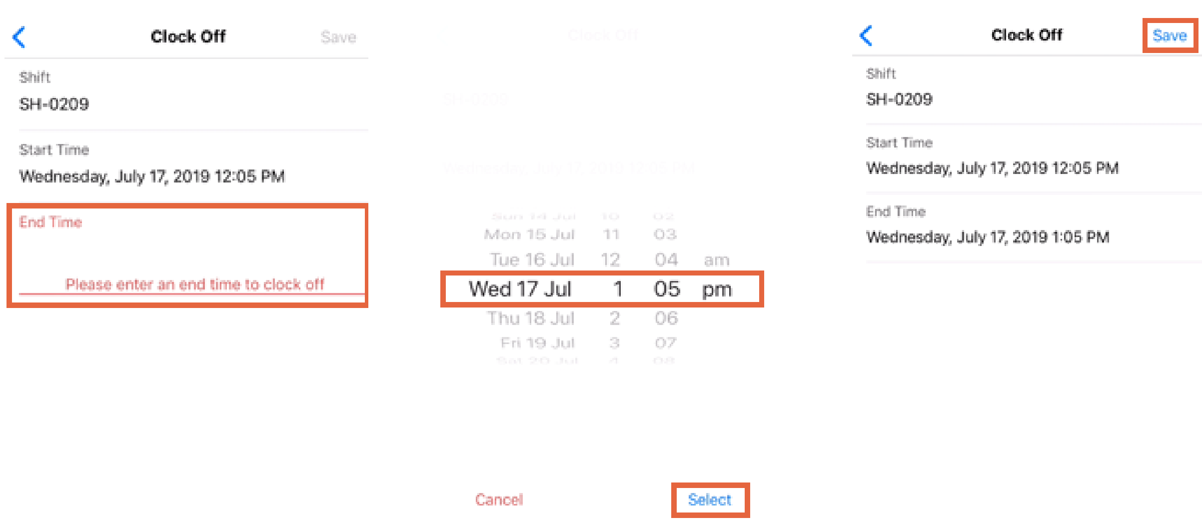
This functionality is triggered when you tap on Start Shift.

If you have any outstanding shifts, you'll be notified by a dialog. To clock off the outstanding shift or shifts:

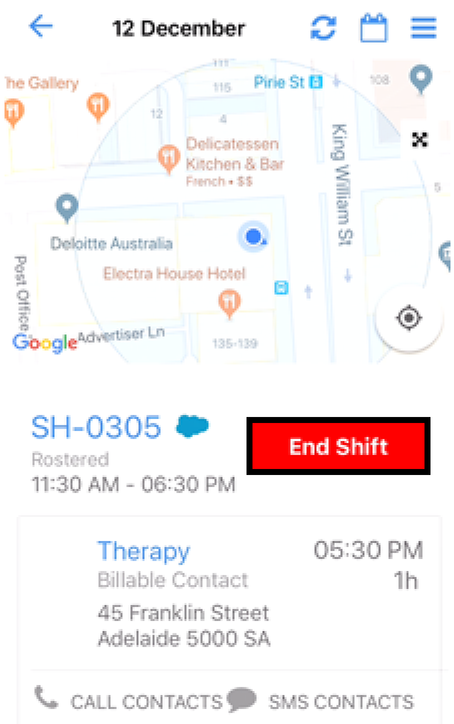
1. Tap on OK.

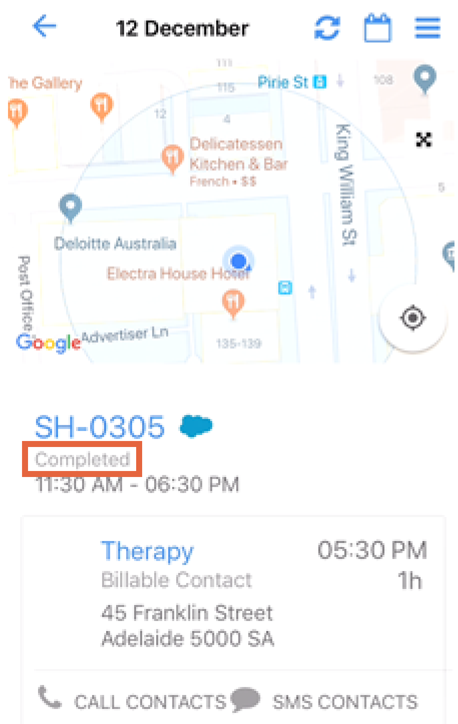


2. This will open a Clock Off form showing the start time of the outstanding shift. Tap in the End Time field.
3. Swipe up and down in the calendar to select the time that the shift ended.
4. Once you've displayed the correct time and date, tap on the Select text link.
5. Then tap on Save.



6. If you have any other outstanding shifts, you'll need to clock those off using the same process. Once you've clocked off all outstanding shifts, your new shift will automatically begin, and you'll see the End Shift button.
7. Make sure you open the app and tap on the End Shift button at the end of your shift. Otherwise, you'll be prompted to clock off before you start your next shift and you'll need to repeat this process. Once you've tapped on End Shift, the status of your shift will change to Completed.
8.



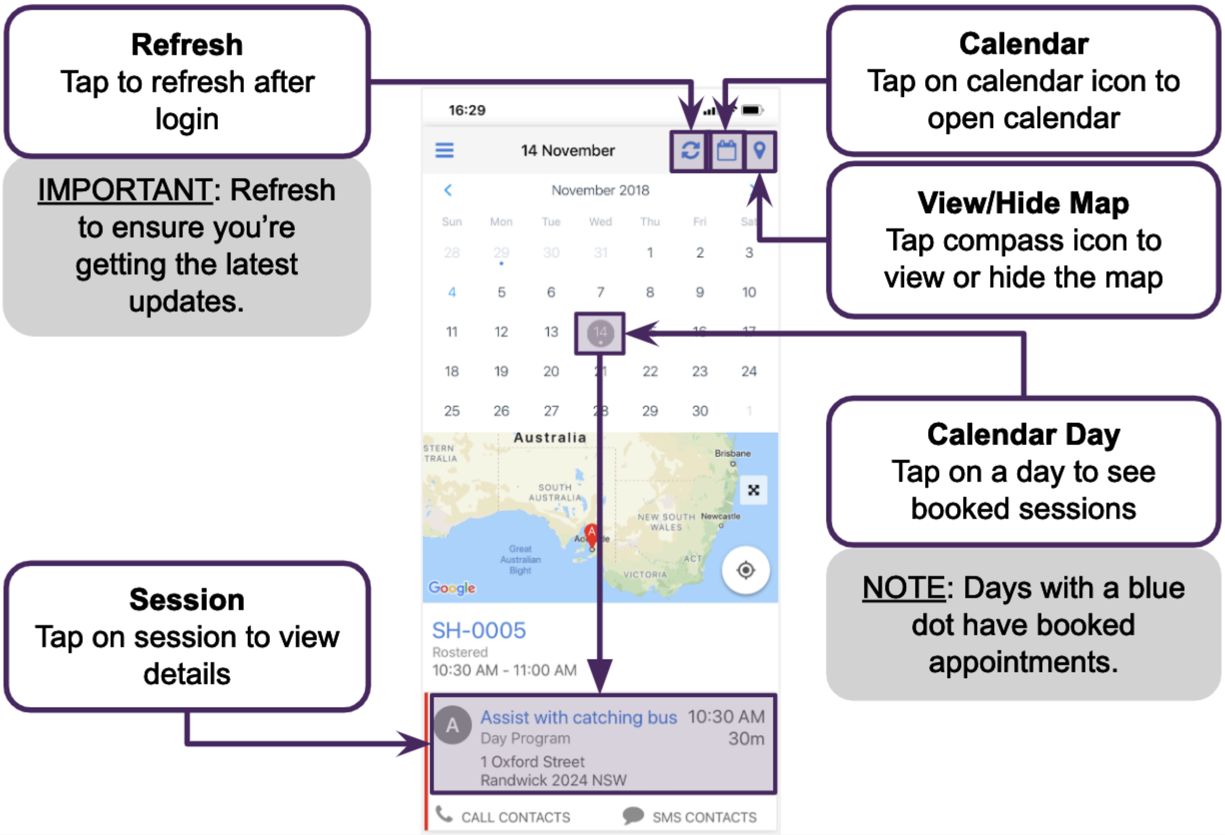


If you use the Start Shift and End Shift buttons, the Actual Start and Actual End recorded on the shift will match the dates and times of when you tapped those buttons.

Viewing Sessions

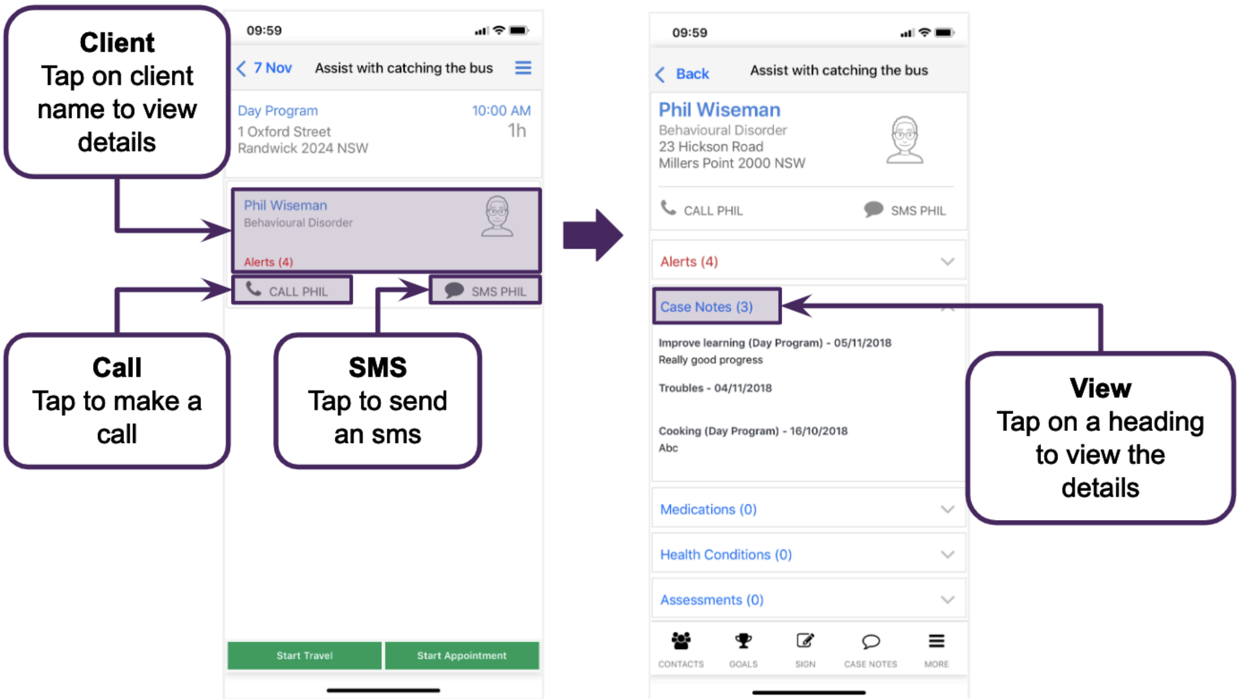
View Session by Calendar day

Select a day from the calendar to view the sessions booked for that day.



View Client Details

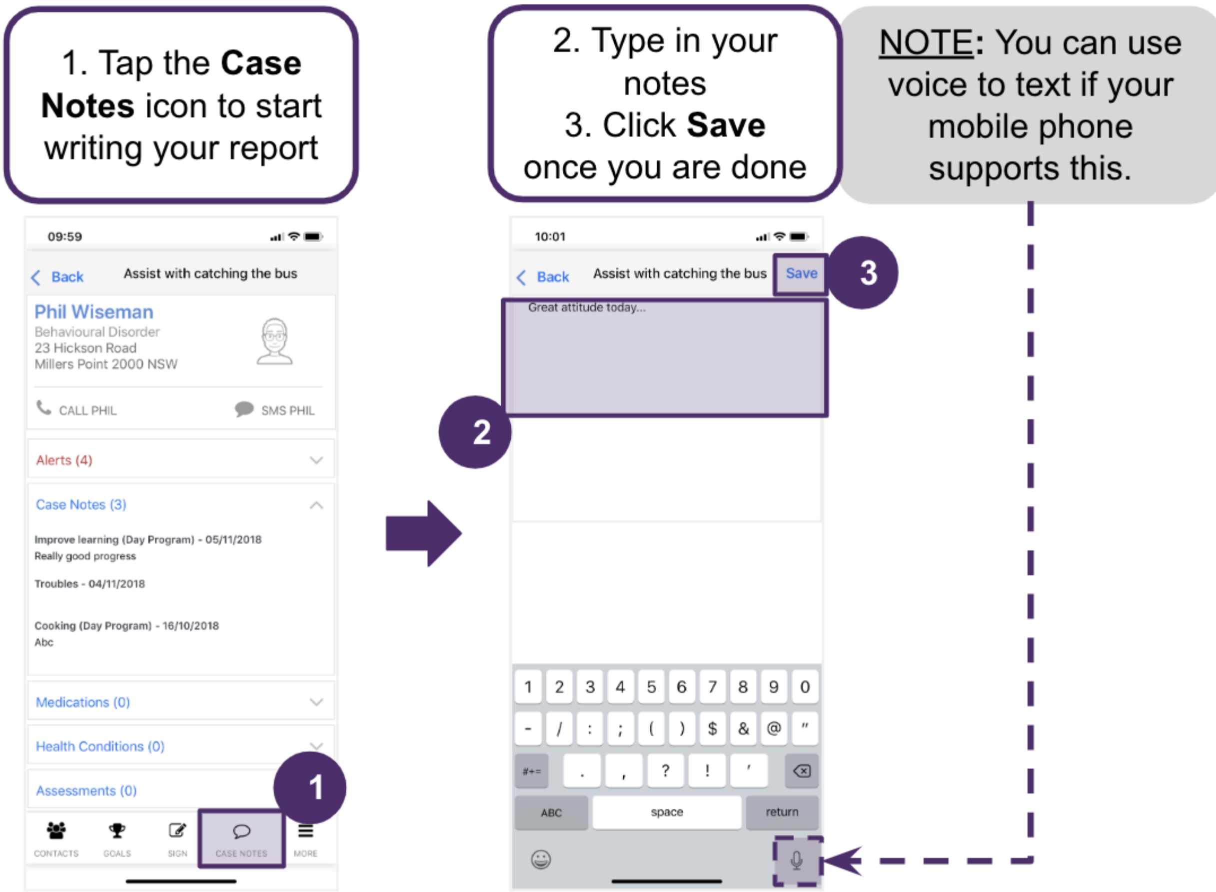
View the session details, make a call or send an SMS. View information about the client.


Client
Tap on client name to view details
Call
Tap to make a call
SMS
Tap to send an sms
View
Tap on a heading to view the details
09:59
7 Nov
Assist with catching the bus
Day Program
10:00 AM
1 Oxford Street
1h
Randwick 2024 NSW
Phil Wiseman
Behavioural Disorder
Alerts (4)
CALL PHIL
SMS PHIL
Start Travel
Start Appointment
09:59
Back
Assist with catching the bus
Phil Wiseman
Behavioural Disorder
23 Hickson Road
Millers Point 2000 NSW
CALL PHIL
SMS PHIL
Alerts (4)
Case Notes (3)
Improve learning (Day Program) - 05/11/2018
Really good progress
Troubles - 04/11/2018
Cooking (Day Program) - 16/10/2018
Abc
Medications (0)
Health Conditions (0)
Assessments (0)
CONTACTS
GOALS
SIGN
CASE NOTES
MORE

Capturing Notes & Signature

Add case note

During or at the end of the session, write your session notes.

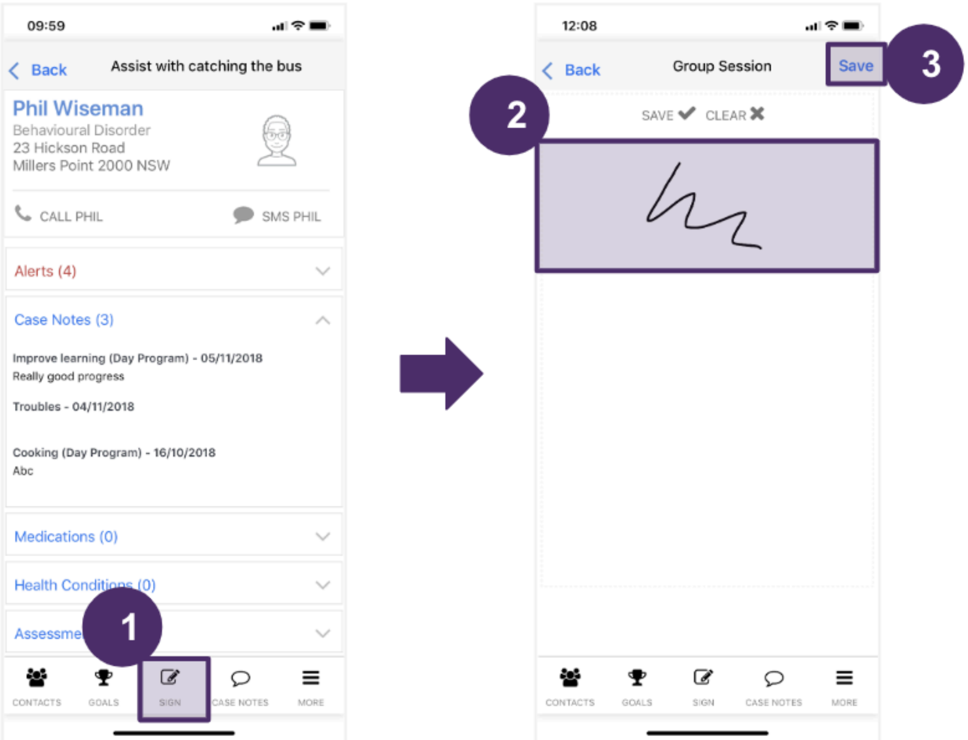


Get Signature

You can get a signature from the client by signing on your device screen using their finger or a stylus.

1. Tap **Sign** icon to capture the client's signature

2. Let the client sign
3. Click **Save**

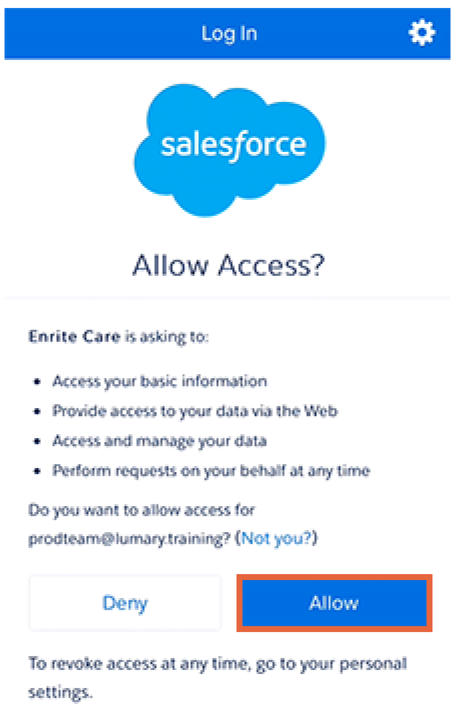


Allow a device to access information from a Lumary Salesforce environment

This article explains what it means when you allow access on a mobile device when logging into Lumary or Salesforce.

When you log into Lumary or Salesforce through a mobile app, you may be prompted to allow access. This prompt is to allow your mobile device to access information from your organisation's Lumary Salesforce environment. For example, allowing access to basic information means that you'll be allowing the device you're using to access basic information stored in your organisation's environment, such as your user id.

The allow access prompt does not give Lumary or Salesforce access to personal information stored on your mobile device.



To help keep your organisation's data secure, we recommend that you:

- consider whether the device you're using is a public or shared device before allowing access, and
- log out of Lumary when you've finished using the app for the day.

Data usage of mobile apps

This article provides information about the download sizes and estimated data usage of the Lumary and Salesforce mobile apps.

The largest amount of mobile app data use generally occurs during the initial download and installation. The table shows the approximate download sizes as listed on each store at the time of the release of Lumary 13.

App	Apple App Store	Google Play
Lumary	32 Mb	7 Mb
Salesforce	132 Mb	157 Mb

After the initial download and installation, the Lumary app will install approximately 50 Mb of additional data on the user's device for elements such as:

- profile pictures
- contact details
- recently viewed records.

Once downloaded and installed, ongoing data usage is quite small. During testing, which involved daily access at a rate slightly higher than we would expect for typical worker use, we observed data usage of approximately:

- 10 Mb per month for the Lumary app
- 4 Mb per month for the Salesforce app.

Data usage will increase with the upload of media, for example, when:

- replacing profile pictures
- attaching or retrieving case note photos or videos.