

LumaLayer SLP

Onboarding & Training Guide

A practical guide for moving from student setup to documented sessions, progress tracking, and consent-aware family sharing.

Current product guidance

This PDF is generated from the same help content shown inside LumaLayer.

Getting started

What LumaLayer does and the five-minute path to your first finished session.

LumaLayer is a caseload operating system for school and pediatric SLPs. It holds your students and their IEP goals, captures what happened in a session, and turns that into documentation, progress data, and a family summary — without you retyping anything.

The fastest way to understand it is to run one real session end to end. Budget about five minutes.

1. Add a student under Students → Add student. First and last name are enough to start.
2. Import that student's IEP so goals are available. You can also add goals by hand.
3. Start a session from the dashboard, pick the student and the goals you're targeting.
4. Record or type what happened, log trial data against each goal, then finish the session.
5. Review the generated SOAP and progress note on the Outputs screen, edit anything, and save.
6. If the family has consent on file, share the summary to the parent portal.

Common mistakes

- Starting a session before importing the IEP — the goal picker will be empty.
- Closing the browser tab mid-session before pressing finish. Finish the session first; the note generates from there.

Students & caseload

Adding students, service minutes, guardians, and preferred language.

Everything in LumaLayer hangs off a student record. Students you create are visible only to you and anyone assigned to that student's caseload.

1. Students → Add student. Enter name, and optionally grade, date of birth, district ID, and primary language.
 2. Open the student to see their IEP goals, progress history, guardians, service minutes, and family summaries.
 3. Add service minutes (frequency and duration) so the Calendar can compare delivered service against what the IEP mandates.
 4. Add each guardian with an email address and a preferred language. Family summaries are generated per guardian in that language.
- Initials, not full names, are shown in session lists and on shared surfaces.
 - Primary language on the student record is separate from a guardian's preferred language — a student can be served in English while a parent reads Spanish.

Common mistakes

- No guardian email on file — the parent portal invitation has nowhere to go.
- Leaving service minutes blank — delivered vs. mandated will show nothing to compare against.

IEP import

Uploading an IEP, reviewing extracted goals, and keeping goals active.

Open a student and choose Import IEP. Upload a PDF (or paste the text) and LumaLayer extracts goals, short-term objectives, accommodations, PLAAFP statements, and service minutes into an editable draft.

1. Upload the IEP PDF or paste the relevant text.
 2. Review the extracted goals. Nothing is saved until you commit the import.
 3. Fix wording, measurement type, baselines, and targets. Add or delete goals and objectives by hand where extraction missed something.
 4. Commit the import. The previous IEP is archived and the new one becomes the student's current IEP.
- Only goals on the current (draft or active) IEP appear in the session goal picker.
 - Importing again archives the prior IEP rather than deleting it, so history is preserved.
 - Extraction is AI-assisted. Treat it as a first pass and always read the goals before committing.

Common mistakes

- Committing without reading — measurement type and targets are the fields extraction gets wrong most often.
- Importing a scanned IEP with no text layer. If the PDF is an image, paste the text instead.

Running a session

Language agent, recording, goal picker, and trial data.

1. Press Start session on the dashboard, or start from a calendar event or a student page.
 2. Pick the student, the goal area, and a Language Agent. Choose None if the session is in English and no translation is needed.
 3. Select the IEP goals you're targeting today. These drive the note and the progress history.
 4. Record audio, or work without recording and type your observations. Recording defaults on when a translation agent is selected.
 5. In Goal data, pick the goal worked and tick the specific objective(s) you targeted — objectives are not assumed to be in order, and you can log data for more than one.
 6. Log goal data as you go: trial counts and accuracy for accuracy goals, or the direct measured rate (such as words correct per minute) for rate goals.
 7. Press finish. LumaLayer transcribes (once, then caches) and drafts the documentation.
- Measured goal data is what produces progress trends — a session with no goal data still generates a note but adds no data point.
 - You can leave a session and come back; unfinished sessions stay on the dashboard marked pending.
 - Recordings are stored privately and are never attached to any email.
 - Created a session by accident? Use the trash icon on the session row on the dashboard and confirm — the session, its recording, and its goal data are removed. Sessions already shared with a family can't be deleted.

Common mistakes

- No goals selected — the note will be generic and nothing writes back to progress history.
- Expecting the recording to upload with no connection. If upload fails it is queued and retried; keep the tab open until it clears.

Session outputs

SOAP note, progress note, edits, and progress history.

The Outputs screen shows everything generated from the session: a SOAP note, a per-session progress note, the trial data you logged, and a family-facing summary.

1. Read the SOAP note and edit any section directly. Your edits are what gets saved — the AI draft is a starting point.
 2. Check the progress note against the goals you targeted.
 3. Save. Trial data writes to the student's progress history and appears as a trend on the student page.
 4. Optionally share the family summary (see Family summaries).
- You are the author of record. Nothing is finalized or sent until you act.
 - The transcript is generated once and reused, so re-opening outputs does not re-run AI.

Progress charts & reports

Per-goal trend charts on the student page, and the printable progress report PDF.

Every student page has a Progress section with a chart per goal, drawn from the trial data you logged in sessions. Each chart shows the data points over time against the goal's mastery criteria.

1. Open a student and scroll to Progress. Goals with logged data each get a trend chart.
 2. Preview the progress report in the browser before downloading — it shows exactly what the PDF will contain.
 3. Download the PDF for IEP progress reporting periods. It renders as clean vector graphics, so it prints sharply.
- A goal with no logged data has no chart — log trial data in sessions to build the trend.
 - Sessions on the student page are grouped into collapsible sections; expand one to see older history.

Team workspaces & invitations

Private practices and districts: roles, inviting colleagues, and shared caseloads.

Every account belongs to a workspace. Solo clinicians have a workspace of one; private practices and districts share one workspace with roles — owner, manager, supervisor, or clinician.

1. Open Team from the app menu to see members and pending invitations.
 2. Invite a colleague by email. They get an email with a sign-in link; the invitation shows as pending until they accept.
 3. When they sign in for the first time, the membership activates automatically.
 4. Use Resend on a pending invitation if the email didn't arrive — it re-sends to the exact address on the invitation.
- Owners and managers see seat counts and plan details under Settings, including how many seats the workspace is using.
 - Supervisors can review and co-sign clinician notes where supervision workflows apply.
 - Every membership change is written to an audit log.

Common mistakes

- Inviting a personal email when the colleague will sign in with a work email — the invitation is tied to the address you entered.
- Expecting access immediately — the invitee must click the link and sign in once before they appear as active.

First-login intake

The setup wizard new clinicians complete once, after their short application.

The public access request now asks only for your contact details, the AI acknowledgements, and a signature. Everything else — practice setting, caseload size, tools you use — is collected in a one-time wizard the first time you sign in.

- The wizard opens automatically on first login and must be finished (or saved) before the rest of the app unlocks.
- Progress is saved as you go, so you can leave and pick up where you stopped.
- If you already completed the long application form, your earlier answers are carried over — you won't be asked twice.
- Your answers appear on your Profile under Practice profile, and to the admin reviewing your access request.

Calendar & planning

Event types, drag to reschedule, student linking, IEP prep, and minutes.

The Calendar is a week planner built around an SLP's day: therapy, evaluations, IEP meetings, screenings, consults, travel, and documentation blocks — each color coded.

1. Click an empty slot on the week grid to create an event, or use the agenda view on mobile.
 2. Choose an event type. Therapy and evaluation events require a linked student.
 3. Drag an event to reschedule it — the new time saves automatically in 15-minute steps.
 4. For a standing therapy slot, set Repeats (weekly, every 2 weeks, or monthly) and a repeat-until date; each occurrence is created as its own event you can move or delete individually.
 5. For IEP meeting events, pick the goals to prep; they're written into the event as an IEP prep block.
- The weekly rollup shows minutes by student and delivered vs. mandated service.
 - Completed sessions count as delivered service even if there was no calendar event for them.
 - The week grid is desktop-first; on a phone the same data appears as a scrollable agenda.

Family summaries & the parent portal

Consent, sending a summary, and how a parent reads it.

Families never receive clinical content by email. They get a sign-in link, verify with a one-time passcode sent to the email on file, and read the summary inside the portal.

1. Confirm FERPA disclosure consent is on file for the student. Sharing is blocked without it.
2. Open the session on the Outputs screen, or the Family summaries panel on the student page.
3. Select which guardians should receive it. Each guardian's summary is generated in their preferred language.
4. Share. The guardian gets a notification with a sign-in link only.
5. Track first viewed and last viewed on the same panel, and revoke access at any time.

Common mistakes

- No FERPA consent recorded — the share button will refuse and tell you why.
- Guardian email typo — the passcode goes nowhere. Check the guardian record first.

Privacy, consent & data handling

What is stored, what is gated, and what never leaves the app.

- Student data is row-level isolated. You see only students on your caseload.
- FERPA disclosure consent is a hard gate on family sharing. Other consent types (recording, AI transcription, HIPAA) are recorded in the consent ledger for your records.
- Recordings are stored privately and are only accessible through short-lived signed links.
- No PHI is placed in email bodies or subject lines — parent emails carry a sign-in link only.
- AI review actions are logged so you can show who approved what.

Disclosures to families are written to a disclosure log with timestamp, guardian, and language, which is what you'd produce if a district asks for an accounting of disclosures.

Troubleshooting

The four issues clinicians hit most, and how to clear them.

- Goal picker is empty — the student has no current IEP. Import one, or add goals manually on the student page.
- Student shows 0 objectives — that is normal when the IEP has annual goals but no short-term objectives. If the goals list itself is empty, the import didn't commit; re-run it and confirm the goals before committing.
- Delivered minutes look low — the tile shows the total across the last 13 weeks plus a weekly average, so a single session averages to well under a minute per week. Check the total, not the average, after one session.
- Recording didn't upload — check the pending recordings indicator on the dashboard; it retries automatically. Don't close the tab until it clears.
- Parent can't sign in — confirm the guardian email, then have them request a fresh code. Codes are single-use and short-lived.
- A date looks wrong — dates render in your device's time zone. If a session or measurement still reads a day off, send us the student initials and the time; don't assume it is cosmetic.

If something still looks wrong, note the student initials and the time, and send it over — sessions are timestamped, which makes issues quick to trace.

Glossary & mobile tips

Terms used in the app, and what works best on a phone.

- Language Agent — the target language for the family-facing summary of a session. None means English only.
- Goal data — trial accuracy or a direct measured value such as words correct per minute, plus cue level, logged against a single goal.
- Mandated minutes — service minutes required by the IEP. Delivered minutes are what you actually ran.
- Current IEP — the newest draft or active IEP. Only its goals appear in the session picker.
- Family summary — the plain-language, parent-facing version of a session note.
- On a phone: running sessions, logging trials, and reviewing outputs all work well.
- Best on a laptop: IEP import review, the calendar week grid, and long note editing.