



# QUICK START GUIDE

## Sending Referrals in Genie Version 8

There are quick and easy ways for you to save time using your EMR software. This guide shows you how to send referrals and letters in Genie Version 8



## Duty of Care

The sending site is responsible for ensuring that the duty of care has passed onto the next provider. With electronic correspondence this is much simpler. HL7 specifications include the ability to return acknowledgements from the recipient back to the senders. It is the Senders "Duty of Care" to follow up sites that are not acknowledging.

If the sender does not receive an acknowledgement within 48hrs it is important to contact the recipient and ensure the correspondence was received for the first time (some EMR systems will not send back an acknowledgement). If the recipient did not receive the correspondence, it is important to send a manual copy immediately and contact the HealthLink Helpdesk.

## Creating and Sending a Letter/Referral

Referral letters can be created from the Patient Clinical window, the Appointments Book or the Patients List window.

- a) Select OPEN > PATIENT
- b) Search for the patient using the Search Patient screen

- c) Double click on the patient from the list.

Surname	First Name	Middle	DOB	Chart No	Usual Provider	Last Seen	Last Seen By	Acct Id	Balance
Mouse	Mickey		12/12/1903	34888		21/04/16	Dr A Demo	0	0
Mouse	Minni		13/01/25	34860		23/04/13	Lawrence Peterson	0	0
MOUSE	MINNIE		10/06/71	34858		18/04/16	Dr A Demo	0	0

- d) From the patient's screen select the QUILL icon to start creating the letter/referral



- e) If prompted - search for the provider to whom will be receiving the referral / letter and select OK

- f) Select the provider from the list and select OK

Select a doctor...				
Surname	First Name	Suburb	Clinic	Provider Num
Test	Testing	Suburb	This Clinic	0000000Y

g) Select either the Specialist Letter or Referral option (Refer to following section of this guide to find out how to set Genie to send Specialist Letters)

h) Select the template you wish to use.

Template: **Default Letter** ▾

Date: 23/05/2016

From: Dr A Demo ▾

To: Dr Lawrence Peterso

Type: DISCHARGE S... ▾

i) Once the letter is ready to be sent tick Reviewed

j) Tick Ready to Send

k) Tick Send via 3rd Party – A pop up box will appear requiring further information

Template: Default Letter ▾  Send via 3rd party  Reviewed

Date: 23/05/2016  Printed

From: Dr A Demo ▾  Flag for Followup

To: Dr Testing Test  Reply Received

Type: DISCHARGE S... ▾  Ready To Send  Can't Delete

Sent from Genie  Delivery Acknowledged  Spellchecking

658CDB1D-5DDD-430F-B705-172BA265D781

Cancel Send

CDA Dx View CDA

Make Text Edit Template

l) Select appropriate boxes and click on OK

**PRIORITY**

Routine

Critical/Urgent

ASAP

**REQUESTED ACTION**

Send Written Report

Return Patient After Evaluation

Assume Management

Second Opinion

Discharge Summary

FYI. No Action Requested

Case Conference

Cancel **OK**

m) Select SEND to send and save the letter.

Template: Default Letter ▾  Send via 3rd party  Reviewed

Date: 24/05/2016  Printed

From: Dr A Demo ▾  Flag for Followup

To: Dr Lawrence Peterso  Reply Received

Type: DISCHARGE S... ▾  Ready To Send  Can't Delete

Sent from Genie  Delivery Acknowledged  Spellchecking

8473CF94-A1D9-4800-BF14-33739161E9FF

Cancel **Send**

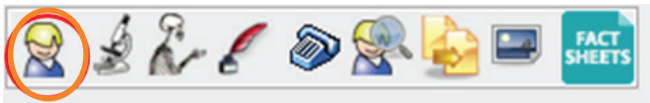
CDA Dx View CDA

Make Text Edit Template

### To Set Specialist Letters

To set Genie to send out Specialist Letters follow the following steps.

a) From the patient record open the Patient Demographic Details



b) Select Add the Referring Doctor in the Referrals section

Referrals:				
+	Referring Dr	Date	Duration	Valid

c) Search the Address Book for the required Doctor

d) Enter any required information into the New Referrals Screen

e) Select OK

New Referral

**Referrals**  Current

Referrer: **Dr Test Provider**

Provider No:

Date Issued:

Date Started:

Duration:  Enter '99' for indefinite referrals

Expiry Date:

Referred To:  optional

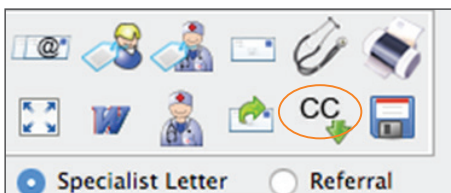
f) The referring Doctor information should be saved and you will now be able to select Specialist Letter.

Referrals:				
+	Referring Dr	Date	Duration	Valid
+	Dr Test Provider	24/05/2016	12	✓

### Add CC to a Letter/ Referral

Follow the steps in the creating and sending a letter/referral section and once the letter has been created you are able to add the CC.

a) Select CC



b) From the drop down screen select Other

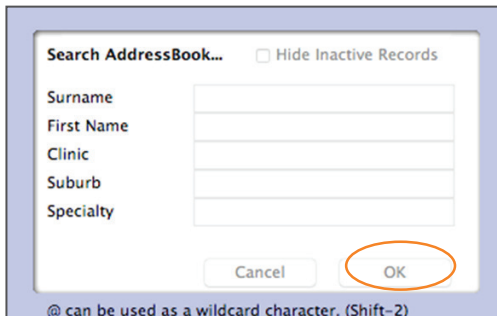
WorkCover Case Manager

All Interested Parties

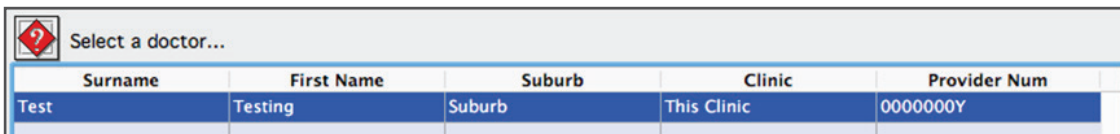
Edit Interested Parties

Other..

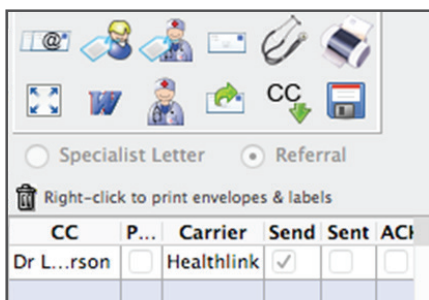
c) Search for the provider you wish to send a copy to and select OK



d) Select from the provider list and select OK



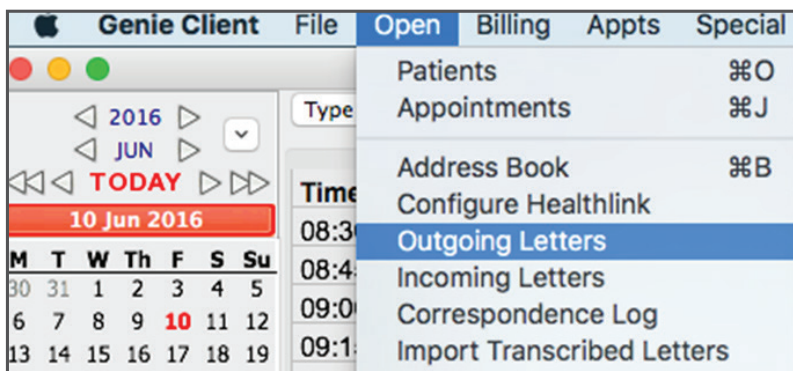
e) Genie will list the CC providers and will automatically send the messages to the CC providers.



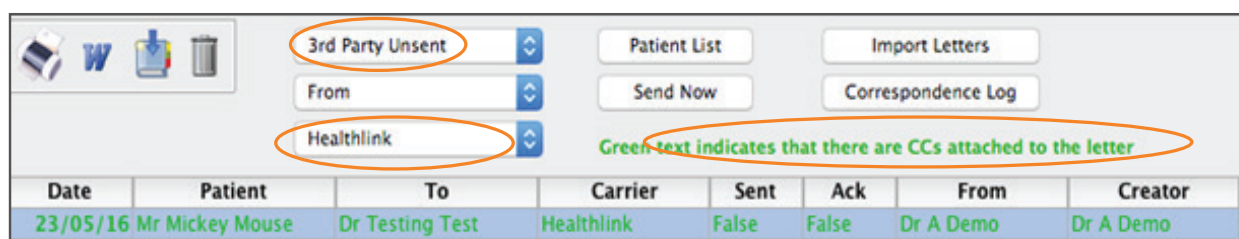
### Checking Outgoing Letter Queue

To view the messages logged by Genie

a) OPEN > OUTGOING LETTERS



b) Set Filter to 3rd Party Unsent and HealthLink. This will display all the messages logged to be sent by Genie to the HealthLink outgoing folders



Green highlighted writing means letter has a cc attached.  
 The waiting letters should be sent automatically on your next scheduled HealthLink connect.  
 (Default to 30mins)

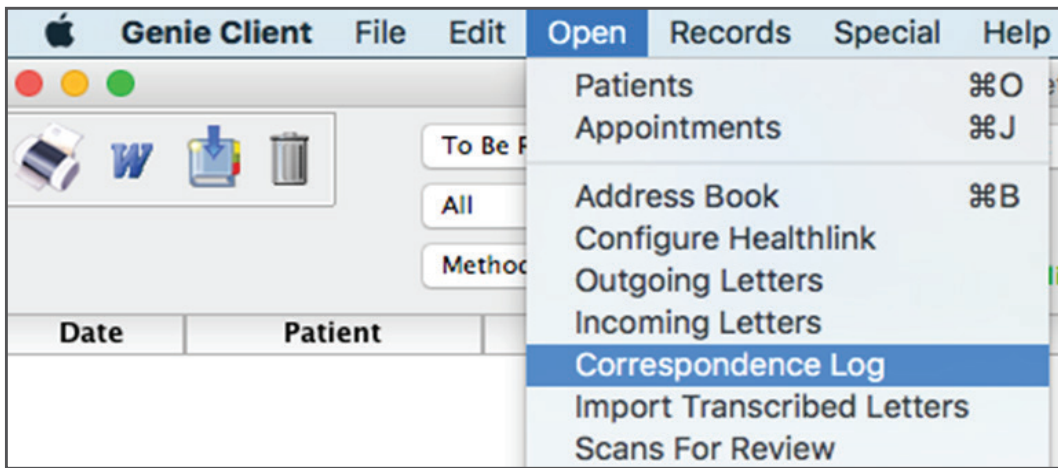
### Checking Acknowledgements

It is important if you are sending letters/referrals or any other types of messages to check that the recipient is actually receiving them. This is part of your "Duty of Care"

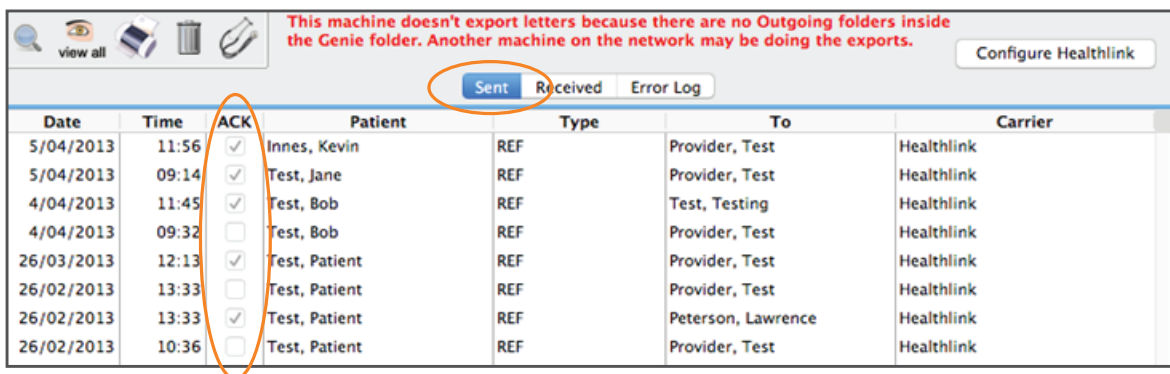
Once you have sent a message, the recipients system should inform you, by way of an acknowledgment to let you know that the message was received successfully. We usually suggest you wait 24hrs before checking for acknowledgements.

To check messages

a) Select OPEN > CORRESPONDENCE



b) Select SENT

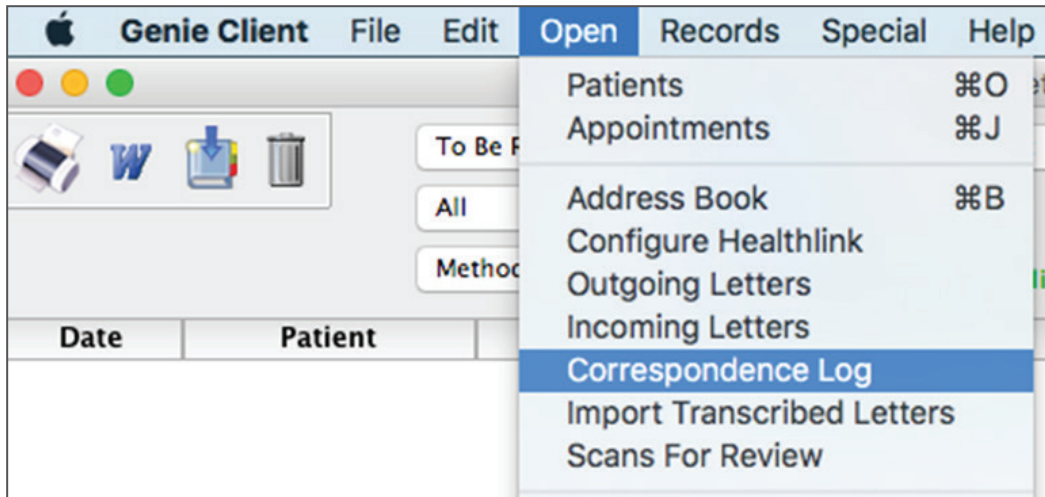


A tick in the ACK box indicates the receiving system has received the referral messages and has sent an acknowledgment back. Please note that some EMR's will not acknowledge and you will need to ring the site to confirm they have received the letter/referral. If they have received the message, we suggest that you make a note that the site will not receive so you will know for next time.

### Negative Acknowledgements

To determine if the receiving system has sent a negative acknowledgement

a) Select OPEN > CORRESPONDENCE LOG



b) Select the ERROR LOG tab

Date	Time	Patient	Error	From	Carrier
9/09/2013	12:24		LETTER NOT ACCEPTED		Healthlink
28/08/2013	11:39		LETTER NOT ACCEPTED		Healthlink
28/08/2013	10:39		LETTER NOT ACCEPTED		Healthlink
9/08/2013	14:38		LETTER NOT ACCEPTED		Healthlink
9/08/2013	14:08		LETTER NOT ACCEPTED		Healthlink
17/05/2013	13:25		LETTER NOT ACCEPTED		Healthlink
26/02/2013	13:51		LETTER NOT ACCEPTED		Healthlink
26/02/2013	13:51		LETTER NOT ACCEPTED		Healthlink
26/02/2013	10:51		LETTER NOT ACCEPTED		Healthlink
26/02/2013	10:51		LETTER NOT ACCEPTED		Healthlink
13/02/2012	18:01		UNKNOWN LETTER ID		Healthlink
26/08/2010	10:18		UNKNOWN LETTER ID		Healthlink
24/10/2007	13:57		PATIENT SURNAME MISSING		Healthlink
22/10/2007	16:25	Martin, Lisa	ORU MESSAGE TYPE		Healthlink

This log will list the negative acknowledged messages or any error Genie had while importing any type of incoming messages.

The Error "LETTER NOT ACCEPTED" indicates a message was negatively acknowledged. Double click on this entry to find out errors and which patient details to fix and resend the message.

For any help with troubleshooting the error you can call HealthLink Helpdesk.

**For all queries, please call the  
HealthLink Customer Support Line:**

Monday to Friday (except public holidays) 8am- 6pm  
Phone 1800 125 036 Support email: [helpdesk@healthlink.net](mailto:helpdesk@healthlink.net)