



Manual



Genie Solutions.
Intelligent Simplicity.

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Table of Contents

Part I Introduction	2
1 Keyboard Shortcuts	3
Part II Backups	8
1 Historical Genie Backups	9
2 Genie Automated Backup	10
3 Restoring A Backup	13
Server - Data Corruption	13
Solo - Reference	17
Part III Menus Overview	24
1 The File Menu	24
2 The Open Menu	27
3 The Records Menu	34
4 The Billing Menu	36
5 The Patients Menu	39
6 The Appts Menu	44
7 The Special Menu	48
Part IV Setting Up Genie	54
1 Practice Preferences	54
The Practice Details Tab	54
The Miscellaneous Tab	56
The Practice Letterhead Tab	58
The Images and Attachments Tab	61
The Clinical Tab	62
Carrier Identifiers	63
2 User Preferences	63
The Details Tab	64
The General Tab	65
The Clinical Tab	67
The Correspondence Tab	69
The Practice Sites Tab	71
The Security Tab	72
The ECLIPSE Tab	73
3 Bank Accounts	73
4 Printing Preferences	74
Troubleshooting	76
Part V The Reception Module	78
1 Appointments	78
Appointment Preferences	78
The Main Tab	78
The Appearance Tab	81
The Column Order and Rooms Tab	84
Using The Appointment Book	85

Appointment Views.....	88
Appointment Scheduler.....	90
Adding An Appointment.....	93
Editing An Appointment.....	95
Appointment Types.....	95
Appointment Status.....	99
Edit Patient.....	100
Moving/Copying Appointments.....	103
Deleting/Restoring Appointments.....	104
Cancellation List.....	106
Finding an Appointment.....	107
Double booking an Appointment time.....	108
Repeating Appointments.....	109
Printing Appointment Book.....	111
Linking a Procedure to an Appointment.....	113
Appointment Reminders	116
Genie SMS Reminders.....	116
Email Reminders.....	126
2 Theatre Lists	126
Set Up	127
Printing a Theatre List	129
Preop Notifications Check	130
3 Invoicing	131
Account Holders	131
Account Holders for Organisations	132
Medicare and DVA Account Holder Records	134
Creating an Invoice	134
Invoicing an Organisation	136
Invoicing Workcover	137
Adding Items to an Invoice	142
Other Item Information	144
Searching the Fee Schedule	145
Selecting the Practice	146
Selecting the Site of Service	146
Multiple Procedure & Diagnostic Rules	147
Known Gap Amounts	148
Assistant's Fees	149
Invoice Memos	151
Setting/Increasing Private Fees	153
Adding and Editing Billing Items	155
Updating Fee Schedules	156
Checking Appointments Have Been Billed	156
Invoicing from the Patient List	157
Deferring Invoices	157
4 Receipting	157
Receipting Directly from an Invoice	157
Receipting an Existing Invoice for a Patient	159
Paying the Gap	161
Receipting an Existing Invoice for an Organisation	161
5 Discounts	162
Applying when Invoicing	163
Applying when Receipting	165
Reversing a Discount	165
Modifying a Discount	167
6 Deposits	168

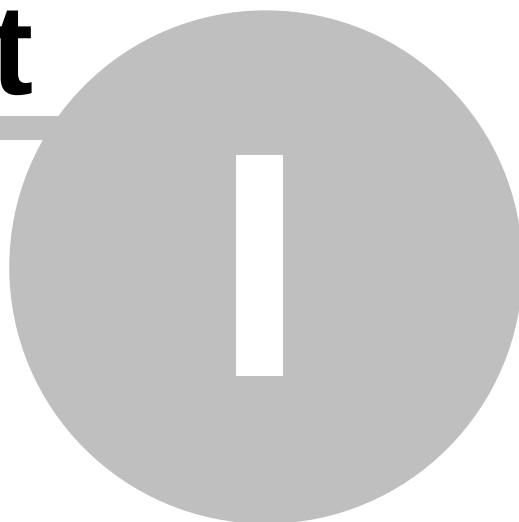
Accepting A Deposit	168
Deleting A Deposit	168
Using A Deposit	169
7 Quotes	171
Preparing Quotes	172
Printing a Quote	175
Creating Quote Templates	175
Invoicing Directly From A Quote	178
8 Private Health Fund Fees	179
9 Account History	182
Reprinting an Invoice or Receipt	183
Printing a Statement	184
Print Report	184
Finding A Batch	184
Itemised Receipt	184
Modifying an Invoice	185
Modifying an Item	186
Changing the Account Holder or Patient	186
Deleting an Invoice	187
Applying a Credit to an Invoice	187
Deleting a Payment	188
Using a Dummy Bank Account (Refunding a Payment)	188
10 Banking	189
11 Manual Batching	190
Creating a New Batch	191
Receipting a Batch	193
12 Online Claiming Installation	195
Install/Upgrade Genie	195
Install HIC Online - Windows	196
Install HIC Online - Macintosh	197
Configure Genie	199
Create the PSI Store	200
13 Using Medicare Online	201
Bulk Bill and DVA Claims	202
Creating a New Transmission.....	202
Retrieving Reports for the Claim.....	204
Reviewing Exceptions for a claim.....	205
Receipting Claim Payments.....	207
Patient Claims	207
Invoicing.....	208
No Payment/Gap Paid By Patient.....	208
Patient Paid Full Amount.....	209
Transmitting Batched Claims.....	210
"Post-Invoice" Claiming and Deleting	211
Online Patient Verification	212
Using Online Verification	213
Updating Certificates	215
14 Troubleshooting Online Claiming	218
15 Referral/Reply Letters (Patient Correspondence)	218
Setting up the Default Template	222
Setting up the 4D Write Area	222
Adding New Templates	223
Fields & Expressions Tabs	224
Editing Templates	227

Reviewing Correspondence	228
Importing Remotely Typed Letters	229
Macros	231
Transcription Services	232
Exporting Demographics	232
Importing Returned Letters	233
16 Electronic Correspondence (Sending via 3rd Party)	234
Writing the Letter	235
Checking Imported Letters	235
3rd Party Providers	240
17 Letter Templates	241
Merged Letters	242
Setting up the 4D Write Area	242
Creating the Letter	243
Saving/Deleting the Template	244
Printing Merged Letters	246
18 Recalls	246
Creating a Generic Recall Template	246
Recalls Due	247
Flagging of Patient Record	249
Printing the Recall List	250
Pathology/Radiology Recalls (Investigation Action List)	251
19 Scanning	252
ImagePro	253
Configuring ImagePro	253
Using ImagePro	256
20 Tasks	259
21 Labels	261
Part VI Clinical	264
1 The Main Page	265
Using the Contact List	267
Using the Display Area	268
2 The Other Page	270
Vaccinations	271
Editing Vaccines and Vaccine Sets	272
Transmitting to AIR	273
3 Consultation Notes	273
4 Drawing Module	279
5 The Tools Menu	282
6 Specifying a Fee to Charge	289
7 Prescribing	290
Prescription Display	290
Button Description	292
Adding a New Prescription	294
Searching Prescriptions	298
Printing Prescriptions to Multiple Patients	300
Medication Sets	301
NPS Documents	303
NPS RADAR Document	303
NPS PILs Documents	307
Updating NPS Documents	307
Submission of Usage Statistics	308

8	Recalls	309
9	Checklists	310
	Creating a Checklist	311
	Using Checklists	314
	Editing Checklists	316
	Uploading/Downloading Checklists	317
10	Pathology and Radiology	318
	Ordering Pathology	319
	Ordering Radiology	322
	Importing Downloaded Results	325
	The Downloaded Results List	326
	Matching and Linking Results to Patients	327
11	Reviewing Correspondence	331
12	Procedures	332
	Adding a Procedure	333
	Pending Procedures	335
	The Procedure Window	337
	Procedure Templates	339
	Printing an Audit Report	340
	Conversion Ratios	341
13	Images	343
	Attaching Images	343
	Viewing Images	345
14	Offsite Logging	348
	Copying the Data File from the Server	349
	Running an Offsite Log	350
	Importing Logs	352
	Features List	352
	Database Replication	354
15	Synchronising With Outlook/iCal	359
Part VII Practice Management		364
1	Maintenance and Reports	364
	The General Page	364
	The Daily Page	367
	The Monthly Page	369
	The Practice Analysis Page	373
	The Administrator Page	378
	Other Reports Page	380
	The Disease Coding Page	382
2	Security	383
	Add/Delete Users	383
	User Access	384
	Edit Groups	385
	Passwords	389
3	Updates	391
	Automated 'Special Menu' Update	392
	Manual Web Update	394
	Updating for Offsite Logging	395
4	Archiving	396
5	Queries & Searches	398
	The Query Editor	398
	Simple Queries	400

Wild Card Searches	402
Searching Across Related Tables	402
Saving a Query for Reuse	403
ICPC/ICD10, Consult & Prescription Searches	404
Searching Attachments/Images	407
6 Quick Reports	407
Report Builder	408
Saving/Loading Reports	416
7 Email	417
Setup	417
Index	421

Part



Introduction

1 Introduction

Important: This manual is now a legacy document, and will no longer be updated. For the most up-to-date information about Genie's features and how to use them, please see the [Genie Knowledgebase](#) on our website. This manual will remain as a reference for older versions of Genie; if there is any information you are unable to find, please let our support team know.

Conventions

We have used a number of font conventions to make it easier to determine whether we are talking about a button, a menu item, a field etc. These are:

- Menu Items look like this **Open > Appointments**
- File paths look like this **/Applications/Genie/Genie.app**
- Buttons look like this **Create Default**
- Fields look like this *Patient Surname*
- Notes look like this **This is important. Please read!**

Where keyboard shortcuts have been documented, we have used the Windows terminology. Macintosh users will need to translate the documented key to the Macintosh equivalent, as described below:

Windows	Macintosh
Alt	Option
Ctrl	Command (The Apple Key)

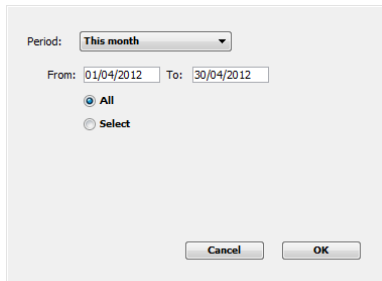
Dates and Times

When used on a network, Genie uses the date and time set on the server computer. If the date and time showing in the Appointment Book is incorrect, the *only possible cause* is that the date and time is set incorrectly on the server. Make sure that you have set the AM and PM time correctly when setting the time on the server.

1.1 Keyboard Shortcuts

Keyboard shortcuts are key combinations on your keyboard that help you maximise your efficiency in Genie. Throughout this manual, you will see keyboard combinations highlighted in blue, e.g. 'Press **Ctrl+N** to create a new patient record.'

Date Fields



The following keyboard shortcuts can be used for quickly jumping between dates when presented with a date field. To use these shortcuts, simply click into the date field and press the relevant button on the keyboard.

Change date to today	T
Go forward a day	+
Go back a day	-
Change date to beginning of week	W
Change date to end of week	K
Change date to beginning of month	M
Change date to end of month	H
Change date to start of year	Y
Change date to end of year	R
Display a calendar	C

General

OK or Save Button	Enter or Return
Cancel Button	Escape
Removing an Item from a Drop-down Menu	Alt - select
Wildcard Character for searches (to represent one of many characters)	@
Select/deselect a checkbox	Spacebar
Quit the Program	Ctrl + Q

Appointments

Open Appointments	Ctrl + J
Find Appointment	Ctrl + F
Find Appointments for Patient	Ctrl + G
New Patient	Ctrl + N
Go To Today	Ctrl + T
Open Patient Demographics Window	Ctrl + E
Open Clinical Window	Ctrl + K
Delete Appointments	Ctrl + D
Toggle View	Ctrl + Y
Print	Ctrl + P
Put in Waiting Room	Ctrl + M
Invoice	Ctrl + I
Receipt	Ctrl + R
View Account History	Ctrl + H
Print Blank DB4	Ctrl + L
Select a Letter Template	Ctrl + Shift + T
Move to Different Dr's View	Alt + Right Arrow/Left Arrow
Open a Doctor's Preferences	Alt - Click on Name Tab
Move an Appointment	Alt - Click and Drag

Patient List

Open Patient List	Ctrl + O
Find Patient	Ctrl + F
New Patient	Ctrl + N
Show All Patients	Ctrl + G
Open Patient Demographics Window	Ctrl + E
Delete Record	Ctrl + D
Print Patient List	Ctrl + P
Sort a Column	Click on Header
Select All	Ctrl + A
Select Multiple Contiguous Records	Shift + Click
Select Multiple Non-Contiguous Records	Ctrl + Click
Invoice	Ctrl + I
Receipt	Ctrl + R
Account History	Ctrl + H
Search with Query Editor	Ctrl + S
Select a Letter Template	Ctrl + Shift/Cmd+ T

Invoice Window

Add New Item	Ctrl + N
Self	Ctrl + 1
Bulk Bill	Ctrl + 2
DVA	Ctrl + 3
Workcover	Ctrl + 4
Other	Ctrl + 5
Health Fund	Ctrl + 6
Select Provider in New Item Window	Up/Down Arrow Keys
Use Health Fund Schedule	Ctrl + P

Clinical Window - General

Open Patient Demographics Window	Ctrl + E
Pathology Request	Ctrl + L
Radiology Request	Ctrl + U
Create a Letter	Ctrl + R
Select a Letter Template	Ctrl + Shift + T
Open Images Window	Ctrl + I
Move to next/previous page	Alt + R Arrow/L Arrow
Create a New Task	Ctrl + T

Clinical Window - Summary Page

Add a Prescription	Ctrl + M
Print Selected Prescription(s)	Ctrl + P
Delete Selected Prescription(s)	Ctrl + D
Add Medication without doses	Alt - Click on Add button
Select/deselect all prescriptions	Alt - Click on Print button
Back-date a prescription	Alt+Ctrl - Click Print button

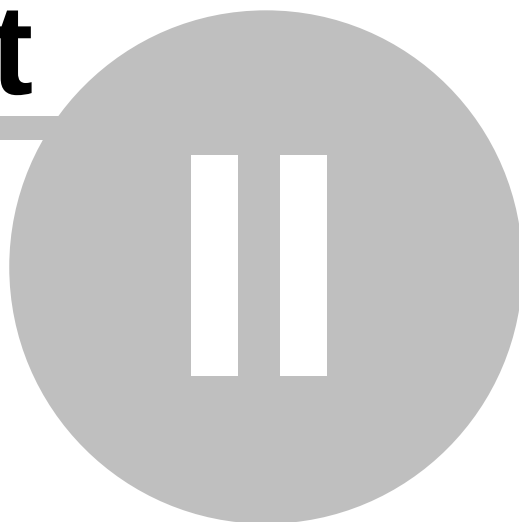
Clinical Window - Notes Page

Delete Selected Item	Ctrl + D
Toggle between windows	Ctrl + Z

Pathology & Radiology

Match	Ctrl + M
Link	Ctrl + L
Unlink	Ctrl + U
Print	Ctrl + P
Edit Patient	Ctrl + E

Part



Backups

2 Backups

Backups are vital to your practice and should be taken very seriously. The most computer literate person in your practice should be in charge of the backups because although it is generally simple to set up and manage, the implications of not understanding or maintaining the process can be devastating.

Note: Genie Solutions will not implement any automated backup procedures on your computer. This is because we cannot physically check that these procedures continue to work correctly. If you would like to use automated backups, you must learn how to do it yourself so that you can recognise and resolve any problems, should they arise.

What is a Backup?

A backup is a copy of your important information that is:

1. Geographically remote from the original, and
2. Able to be re-installed onto another computer.

What to Backup?

All your important data is stored in the Genie data file while all your scanned images are stored in the Images folder. The following files and folders must be included in your backup procedure:

- Genie.4DD
- Genie.4DIdx
- Genie.Match
- Genie.4DSyncData
- Genie.4DSyncHeader
- Images folder
- Handouts folder (If you have handouts in **Open > Patient Handouts**)

Where are the Genie data files?

These files and folders are located directly in your Genie folder either on your computer (for single users) or the server computer (for networked users). By default this is:

Mac: **/Applications/Genie/**

Windows: **C:\Genie**

Note: Know where your data files are at all times. If Genie is installed in a different location other than the default location, then we cannot tell you where your data is located.

When to backup?

Ideally, you should have serial backups. That is, you should have backups for each day of the previous week, and then one historical backup (see [Historical Genie Backups](#)) for each week. It is important to be able to look at the state of your data file at various times in the past because it may be some time before you realise that a record is missing or that the data file has become corrupted. If you overwrite each day's backup, you will lose this ability.

Let's be brutally honest...

It has been said that there are two kinds of people in the world: Those who have lost data and those who are about to.

It is possible for the Genie data file to become irreparably damaged.
It is possible that the entire data file can be lost (e.g. a hard drive failure).

You are responsible for the safe-keeping of your data file.

You are responsible for ensuring that backups are taking place and that they are completing successfully.

Genie does not move the data file. Ever.

If the data file cannot be found in the Genie folder, then someone has moved it from this location.

In fact, Genie expects the data file to be in the same folder as the application. If it is not, you will get a alert when you open Genie, asking you to identify the location of the data file.

Note: Do not move the Genie folder from its default install location (i.e. the Applications folder on Macintosh, or the root of the selected drive (e.g. C:\) on Windows). If you cannot find your data file, we don't know where it is. We only know where it should be, not where it has been moved to.

Priorities

As in medical practice, disasters are usually the result of a string of minor, unrecognised mistakes.

- Do not be complacent. When it comes to backups, paranoia is the correct state of mind.
- Learn how to burn a CD, or how to use a USB/removable hard drive.
- Backups need to be geographically remote from the original to be effective. If there is a fire at the practice, it will destroy the backup sitting on your desk as well as your computers.
- If at any stage you cannot find your data file or if a backup does not appear to be running, tell someone immediately.
- Carefully read the prompts that appear on your screen.
- There is no reason to create a new data file.
- When asked if you would like to overwrite an existing file, triple check that this is actually what you want to do.
- Always backup before an update as a precaution in case something happens during the update process.
- Make sure you are backing up the data file, not the Genie application. There is no point in backing up the Genie application as it can be re-installed at any time.
- If you are not sure about backups or do not want to manage your backups, consult an IT company.
- Check your backups frequently. If you need to revert to a backup, and that backup has been failing, there is nothing that we can do.

2.1 Historical Genie Backups

As well as performing backups for emergencies, you should also create regular historical backups of your data and application files. Historical backups allow you to have snapshots of your data at different times in the past. This is essential if you are keeping computerised consultation notes, but still a very good idea even if you are not. It is also useful in the event that you have to look at what your data file looked like several years ago.

The historical backup must contain everything you need to open the data file. For example, if you want to open a data file from two years ago, you will need to open it in the same version of Genie that you were using two years ago.

On a Macintosh computer, you should archive the following:

- Genie – the single user application (lamp with black cord)
- Genie.4DD
- Genie.4DIndx
- Genie.Match
- Genie.4DSyncData
- Genie.4DSyncHeader
- Images folder

On a Windows computer, you should archive the following:

- The Solo Application Folder from within the Genie folder.
- Genie.4DD
- Genie.4DIndx
- Genie.Match
- Genie.4DSyncData
- Genie.4DSyncHeader
- Images folder

Once you have made an historical copy of your data file, make sure you are able to open the data file and verify that it contains the information that you expect. This way you can be assured that if you need to review the data in the future that you can open it successfully.

Burning these files to a read only CD (CD-R), dating, signing and witnessing it will make it as medico-legally valid as possible.

Note: You should write on CDs using only specialised pens made for this purpose as using an oil based pen or biro can render the CD unreadable, defeating the purpose of archiving the data.

2.2 Genie Automated Backup

The Genie Automated Backup is an automated backup process that is inbuilt into the Genie Server application. This process, once configured, will make a copy of your Genie data file (i.e. Genie.4DD) and save it as a Genie backup file (i.e. Genie[XXXX].4BK, where 'XXXX' represents the backup run number) in the location that you specify. For example, Genie[0001.4BK]; Genie[0002].4BK. As the configuration process takes place in the Genie Server application, the Genie Automated Backup process is not available for Genie single users.

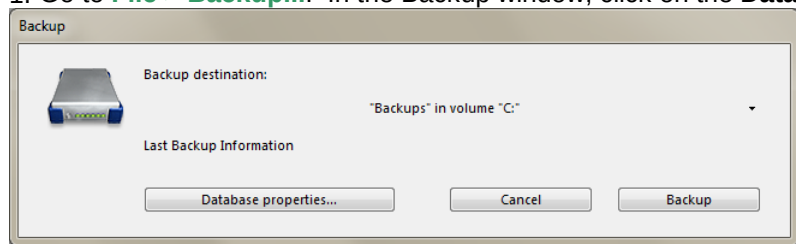
Although this is an automated process, you should check to make sure that the backups are occurring correctly and the data that is contained is valid.

Note: This process only takes a back up of your Genie data file. You must use a separate, external backup procedure to backup your Images folder.

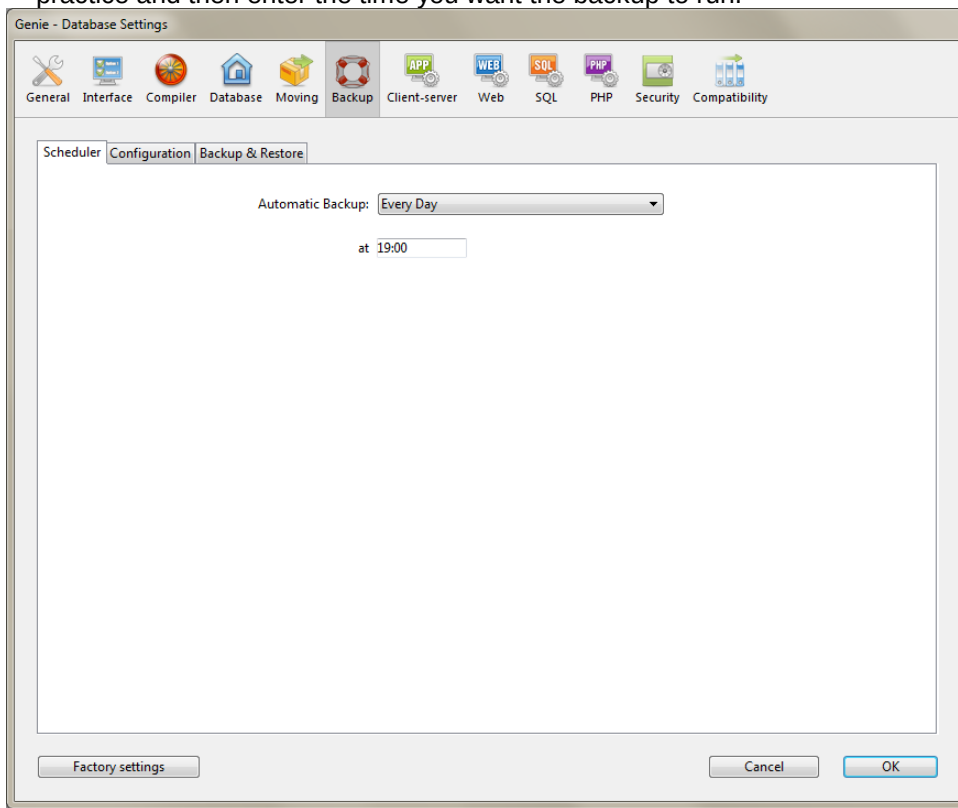
Due to the nature of this procedure, the most computer literate person in your practice should follow these instructions. While simple to follow, the implications of getting this wrong can be devastating.

To configure your Genie Automated Backup, in the Genie Server application:

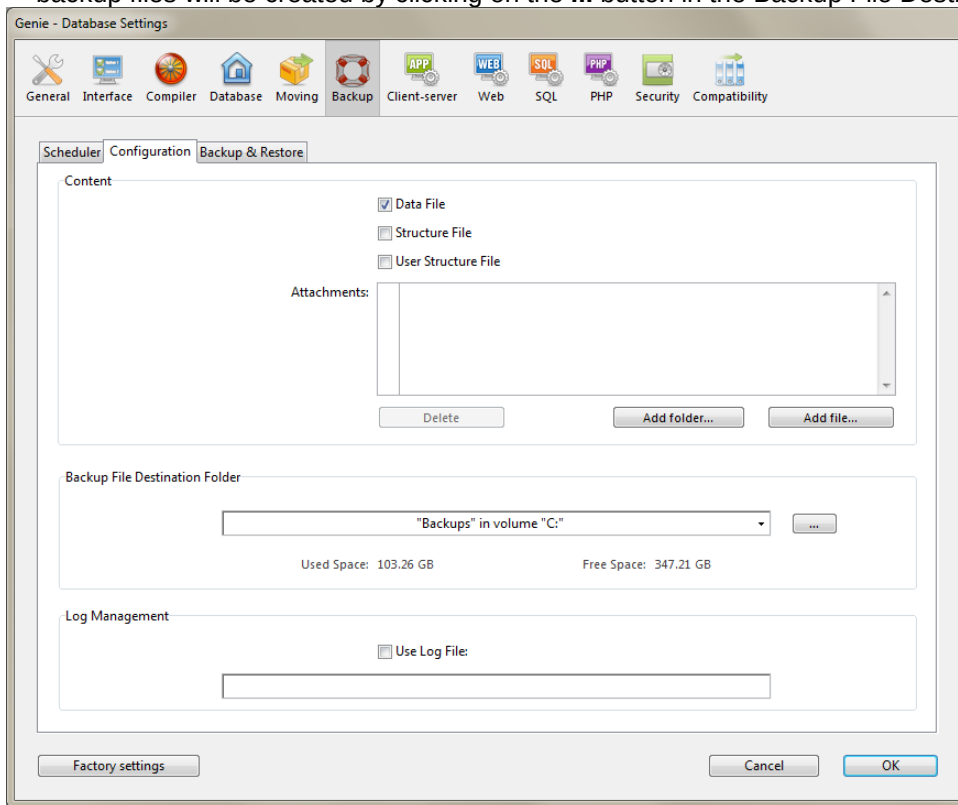
1. Go to **File > Backup....** In the Backup window, click on the **Database properties...** button.



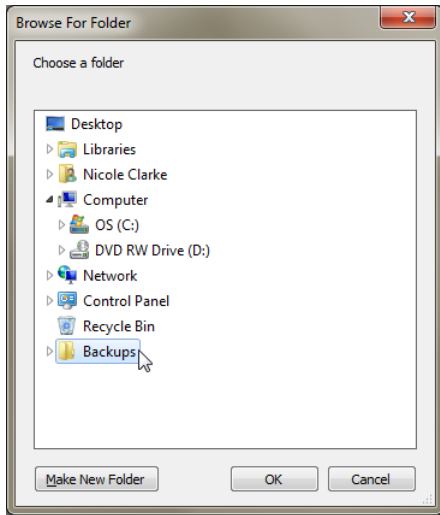
2. Click on the **Scheduler** tab. In the *Automatic Backup* drop-down menu, select the option relevant to your practice and then enter the time you want the backup to run.



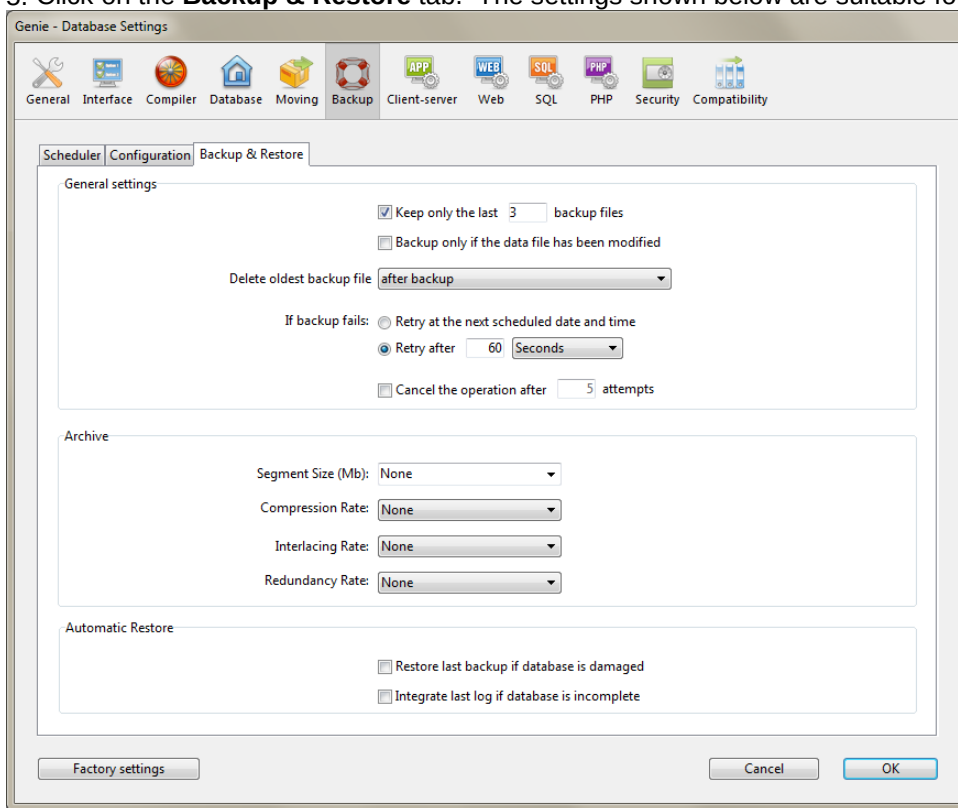
3. Click on the **Configuration** tab. Tick the *Data File* checkbox as per below. Select the folder where the backup files will be created by clicking on the ... button in the Backup File Destination Folder section.



4. The Browse for Folder window will appear. Navigate to and select the relevant folder, then click **OK**.



5. Click on the **Backup & Restore** tab. The settings shown below are suitable for most practices.

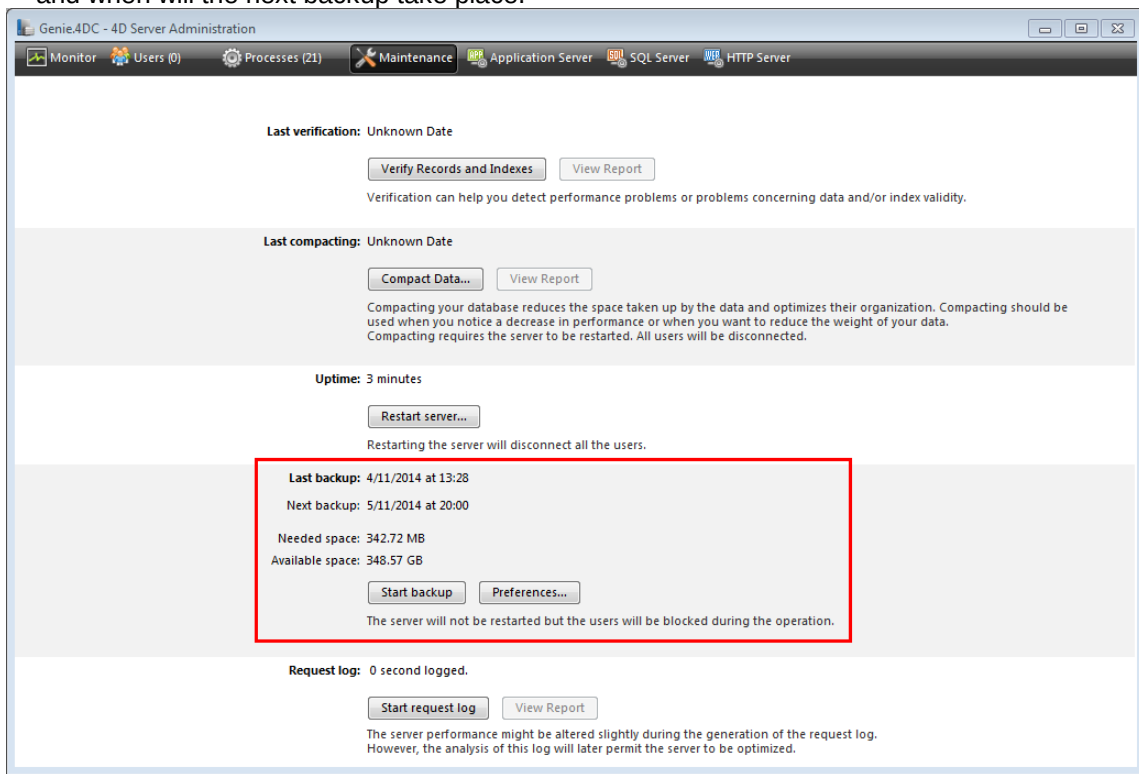


6. Click on the **OK** button to save these settings.

7. In the Backup window, click on the **Backup** button to start the initial backup. A progress window will appear indicating that a backup is in progress.

8. Once this process has completed, you will be returned to the 4D Server Administration window.

9. In the 4D Server Administration window, click on the **Maintenance** tab to see when the last backup occurred, and when will the next backup take place.



Note: The Genie Server application must be running at the specified time in order for the automated backup to take place.

2.3 Restoring A Backup

There are several reasons why you would restore a backup. These include:

- To revert to a previous backup in the event that your current data file has become corrupt or damaged.
- To verify that your backup process is effective.
- To review the data as it was at the time of the backup.

The process that you take to restore a backup depends on if you are using your own external backup process or the Genie Automated Backups.

2.3.1 Server - Data Corruption

The following process should be run if you are no longer able to access your live data file as it has become damaged or corrupt.

Note: If you wish to restore a backup to test your backup process or for references purposes only, please refer to the [Solo - Reference](#) section.

Restoring from an External Backup

The process for restoring a backup made by a third party program involves replacing the current, live data files with the backup data files. The data files are:

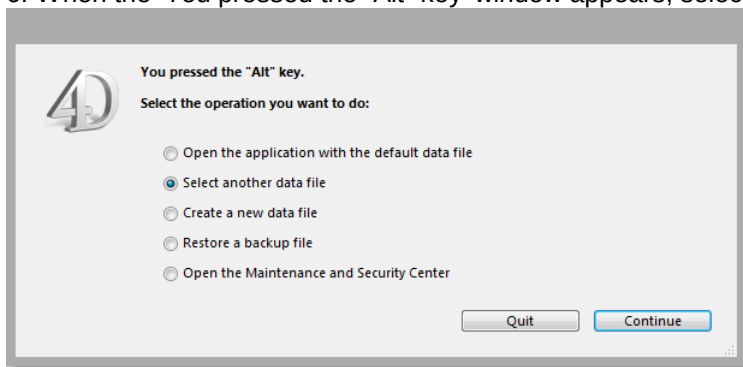
- Genie.4DD
- Genie.4DIndx
- Genie.Match
- Genie.4DSyncData
- Genie.4DSyncHeader

To restore from an external backup:

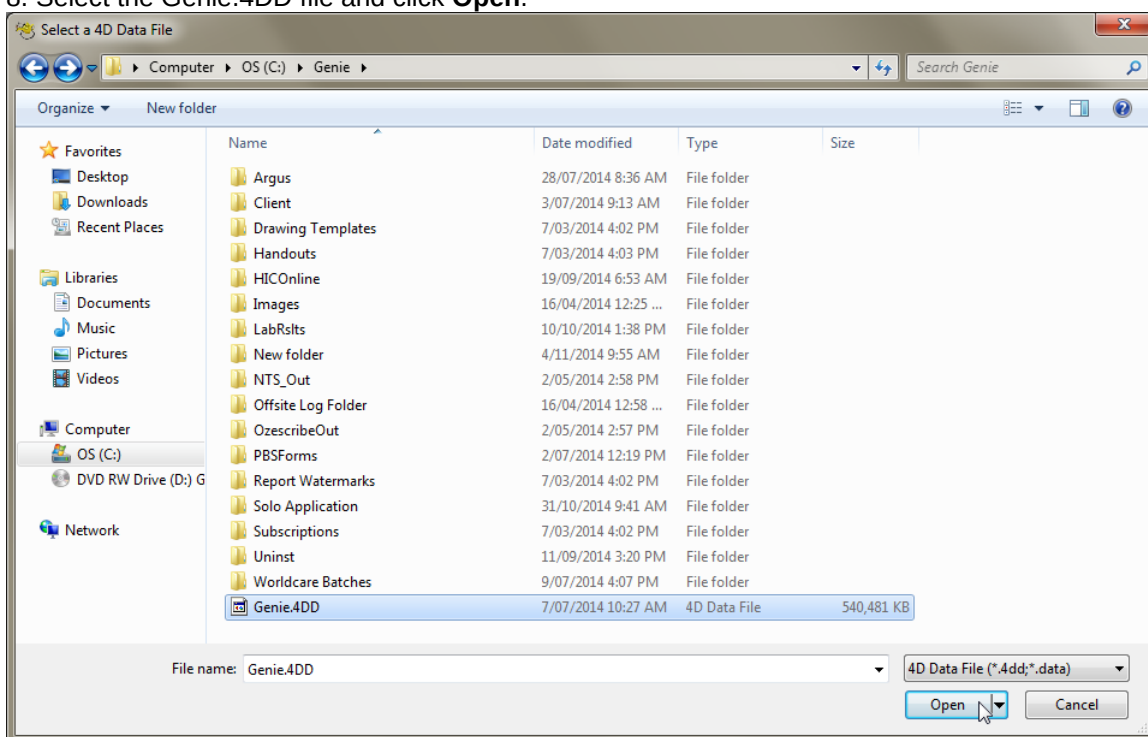
1. Quit out of the Genie Server application.
2. Navigate to the location of your live data file. By default this is:
Mac: `/Applications/Genie/`
Windows: `C:\Genie\`
3. Either move the live data files to a temporary location (e.g. desktop) or rename them (e.g. Genie1.4DD).

Note: It is recommend that you do not delete the live data files until you are certain the backup data has been restored successfully.

4. Copy the data files from your backup location and paste these files into the Genie folder.
5. Double-click on the Genie Solo application and immediately press and hold the **Alt** key on your keyboard.
6. When the 'You pressed the "Alt" key' window appears, select *Select another data file* and click **Continue**.



7. Navigate to the Genie folder.
8. Select the Genie.4DD file and click **Open**.



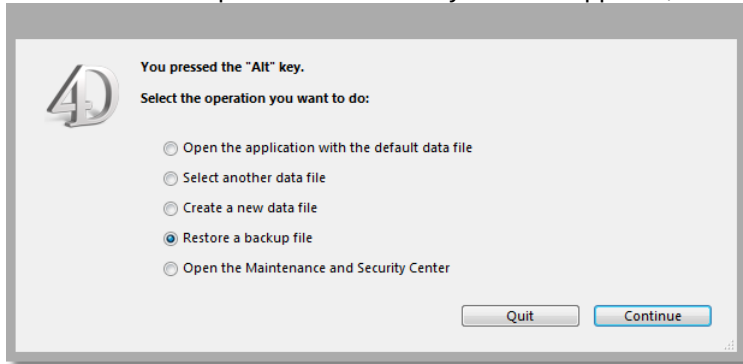
9. Thoroughly check your data file to make sure that it contains the data you require.
10. Close Genie Solo, open Genie Server and reconnect the clients.
11. Delete the old data file that you moved to a different location or renamed.

Restoring from a Genie Backup

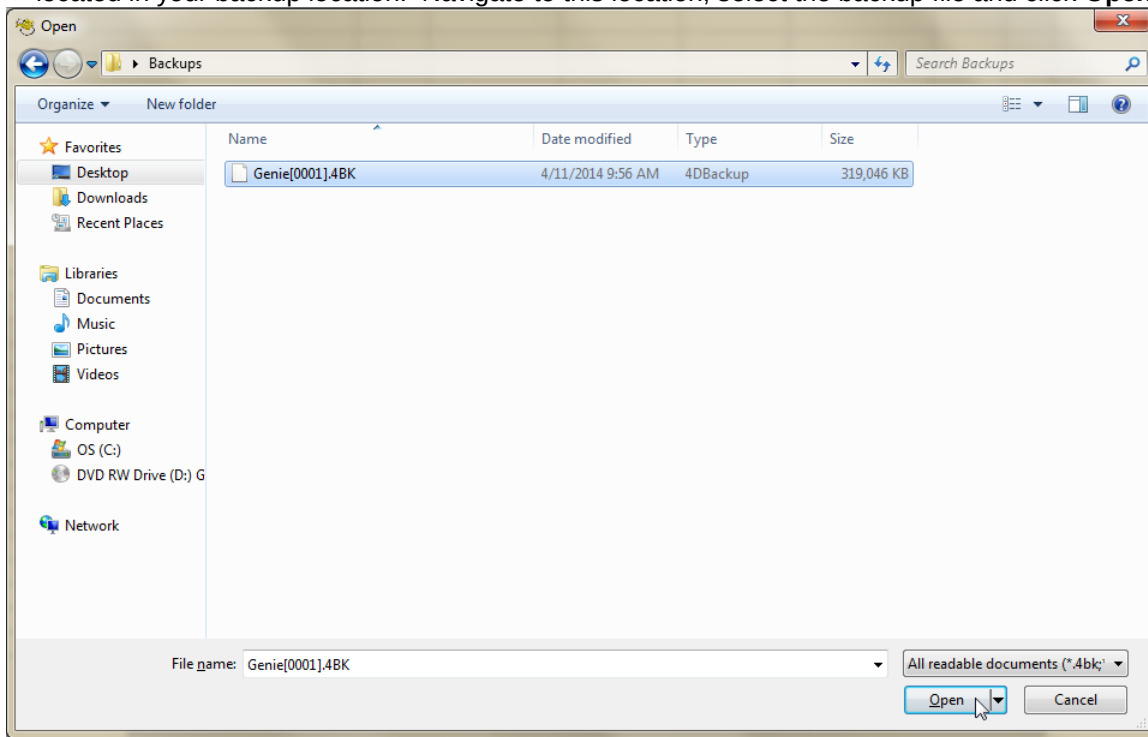
Restoring a Genie Automated Backup converts the Genie[XXXX].4BK file to a folder containing the Genie data file (i.e. Genie.4DD).

To restore a Genie backup:

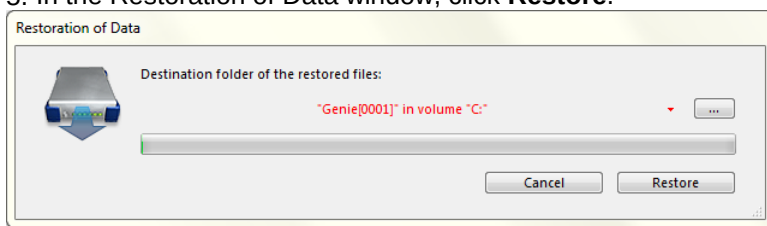
1. Quit out of the Genie Server application.
2. Double-click on the Genie Solo application and immediately press and hold the **Alt** key on your keyboard.
3. When the 'You pressed the "Alt" key' window appears, select *Restore a backup file* and click **Continue**.



4. You will be prompted to select a 4D backup file. It will be in the format of Genie[XXXX].4BK and will be located in your backup location. Navigate to this location, select the backup file and click **Open**.



5. In the Restoration of Data window, click **Restore**.



6. A folder will be created in the same location as the Genie[XXXX].4BK file called Genie[XXXX]. This will contain your restored Genie data file (i.e. Genie.4DD).

7. Navigate to the location of your live data file. By default this is:

Mac: **/Applications/Genie**

Windows: **C:\Genie**

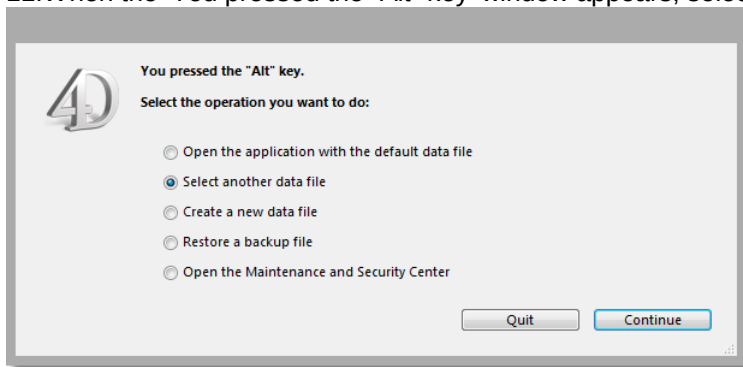
8. Either move the live data files to a temporary location (e.g. desktop) or rename them (e.g. Genie1.4DD).

Note: It is recommend that you do not delete the live data file until you are certain the backup data has been restored successfully.

9. Copy the Genie.4DD file from your backup location and paste this file into the Genie folder.

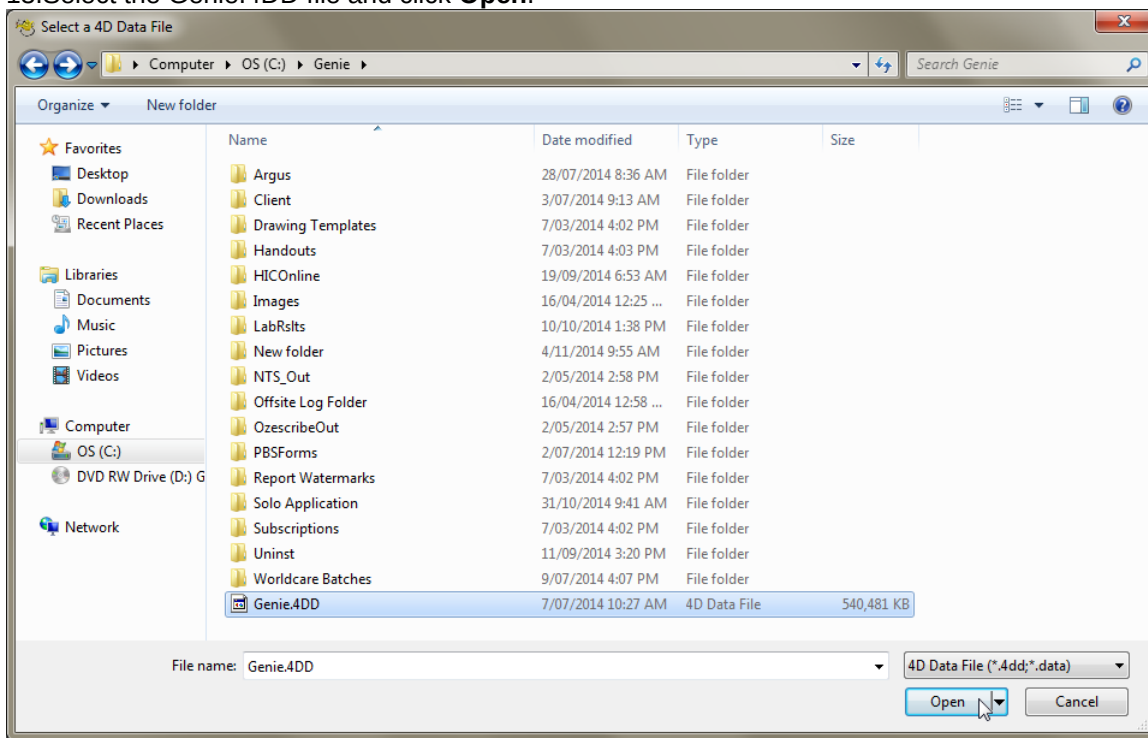
10. Double-click on the Genie Solo application and immediately press and hold the **Alt** key on your keyboard.

11. When the 'You pressed the "Alt" key' window appears, select *Select another data file* and click **Continue**.



12. Navigate to the Genie folder.

13. Select the Genie.4DD file and click **Open**.



14. Thoroughly check your data file to make sure that it contains the data you require.

15. Close Genie Solo, open Genie Server and reconnect the clients.

16. Delete the old data file that you moved to a different location or renamed.

2.3.2 Solo - Reference

The following process should be run as a way to reference information from a backup or to make sure that your backup procedure is working correctly.

Note: If you are restoring a backup as your data has become damaged or corrupt and needs to be replaced, please refer to the [Server - Data Corruption](#) section.

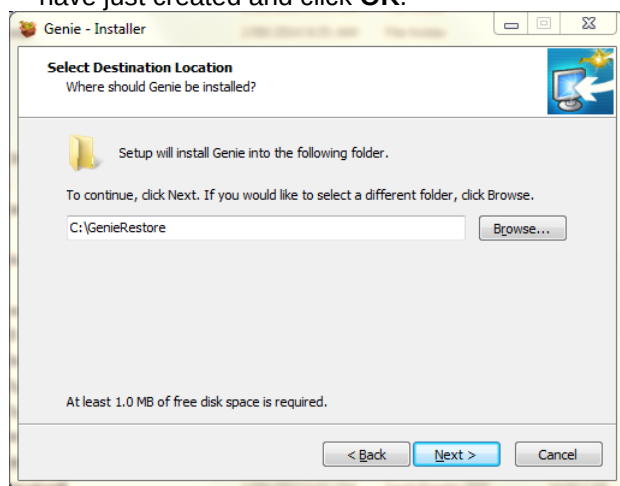
Restoring from an External Backup

The process for restoring a backup made by a third party program involves replacing the current data files with the backup data files. The data files are:

- Genie.4DD
- Genie.4DIndx
- Genie.Match
- Genie.4DSyncData
- Genie.4DSyncHeader

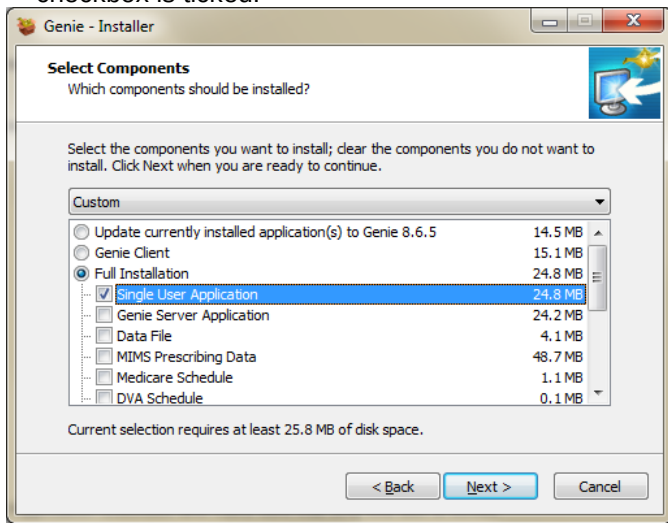
To restore from your external backup:

1. On a computer that is not your server computer, create a new folder (e.g. GenieRestore).
2. Run the Genie Installer (contact Genie Support support@geniesolutions.com.au if you do not have an Installer file).
3. Follow the prompts that appear on the screen.
4. When asked to 'Select Destination Location', click the **Browse...** button, select the 'GenieRestore' folder you have just created and click **OK**.

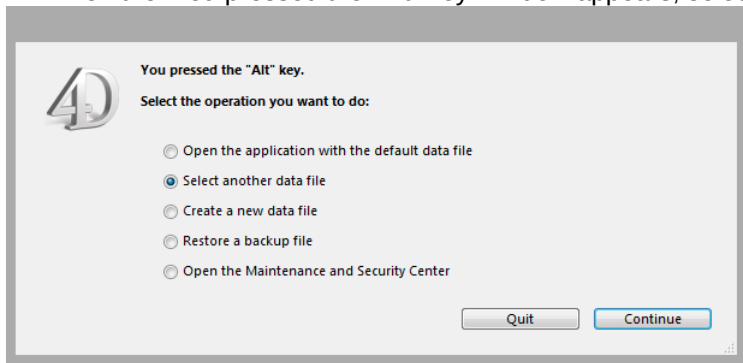


5. Click the **Next >** button.

6. When asked to 'Select Components', tick the *Single User Application* checkbox and make sure that only this checkbox is ticked.

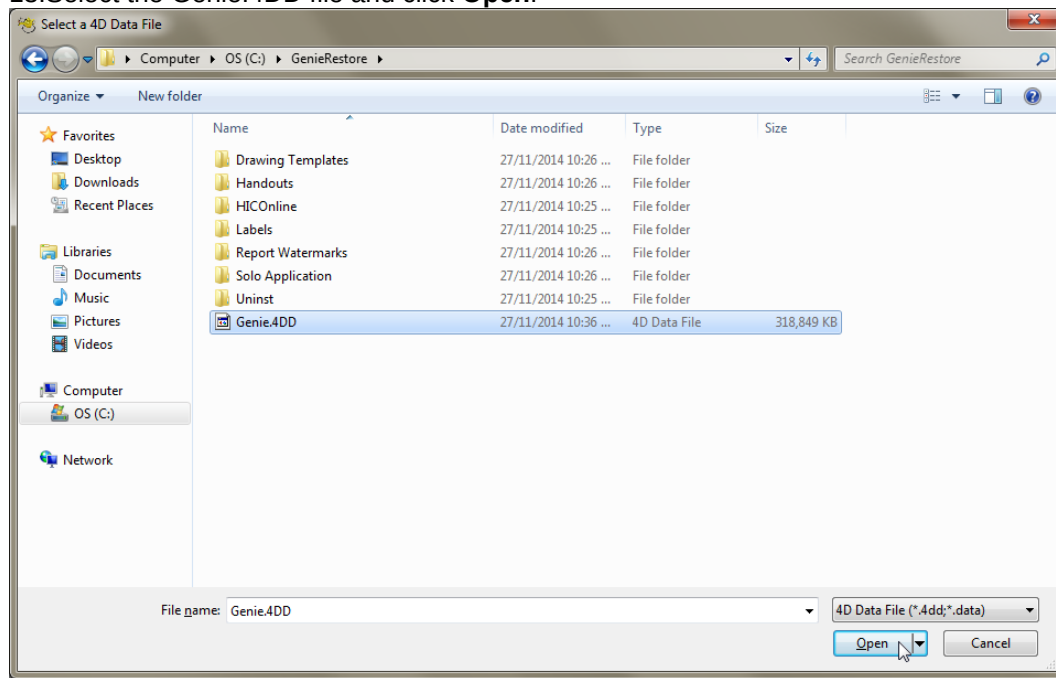


7. Click the **Next >** button.
8. Click the **Install** button and allow the application to complete the installation.
9. Copy the data files from your backup location and paste them into the 'GenieRestore' folder that you have created.
10. Inside the 'GenieRestore' folder that you have created, double-click on the Genie Solo application and immediately press and hold the **Alt** key on your keyboard.
11. When the 'You pressed the "Alt" key' window appears, select *Select another data file* and click **Continue**.



12. Navigate to the 'GenieRestore' folder that you have created.

13. Select the Genie.4DD file and click **Open**.



14. Use the data file to make sure that it contains the data you require or as a reference.

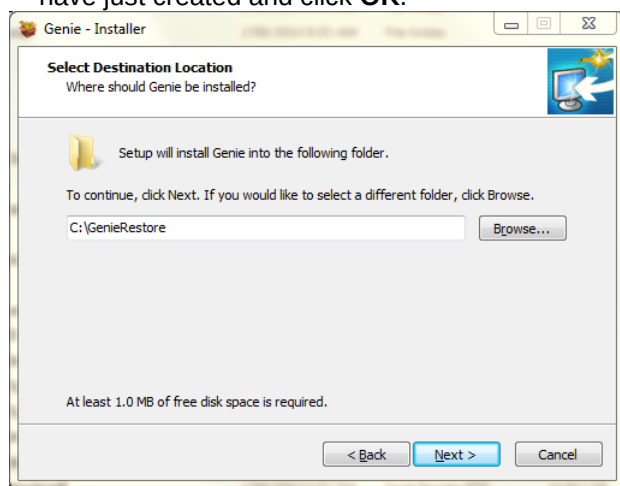
When you are finished with this restored data file and no longer require it, you should delete it from the computer to prevent accidentally entering data into the incorrect data file.

Restoring from a Genie Backup

Restoring a Genie Automated Backup converts the Genie[XXXX].4BK file to a folder containing the Genie data file (i.e. Genie.4DD).

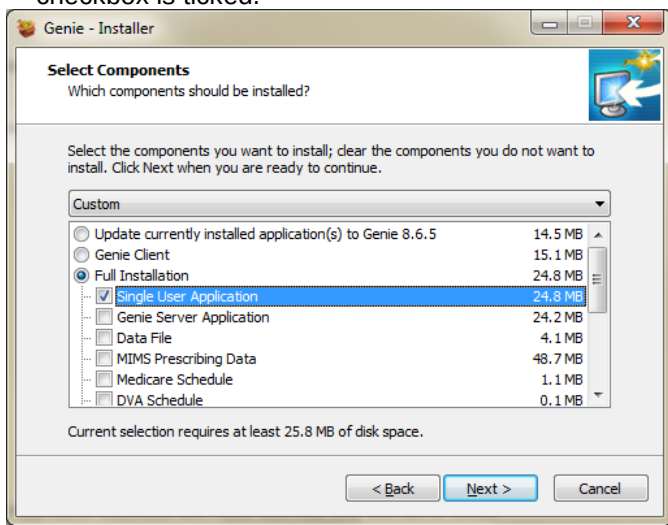
To restore from your Genie backup:

1. On a computer that is not your server computer, create a new folder (e.g. GenieRestore).
2. Run the Genie Installer (contact Genie Support support@geniesolutions.com.au if you do not have an Installer file).
3. Follow the prompts that appear on the screen.
4. When asked to 'Select Destination Location', click the **Browse...** button, select the 'GenieRestore' folder you have just created and click **OK**.

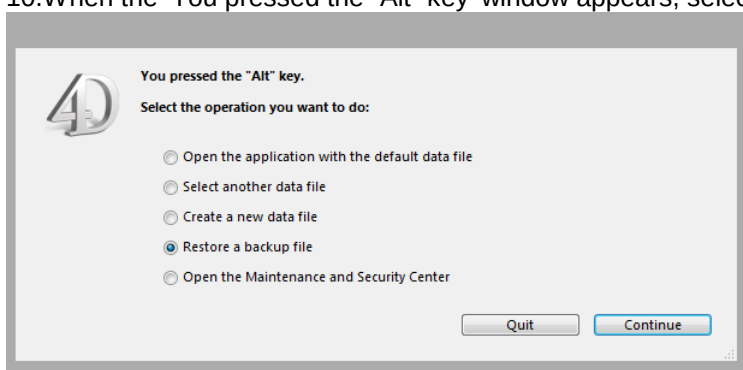


5. Click the **Next >** button.

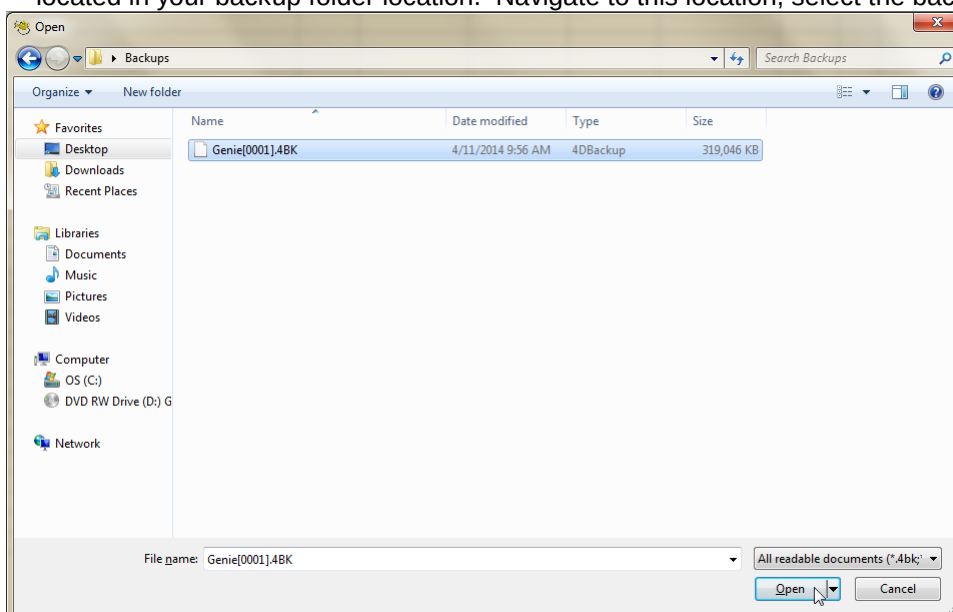
6. When asked to 'Select Components', tick the *Single User Application* checkbox and make sure that only this checkbox is ticked.



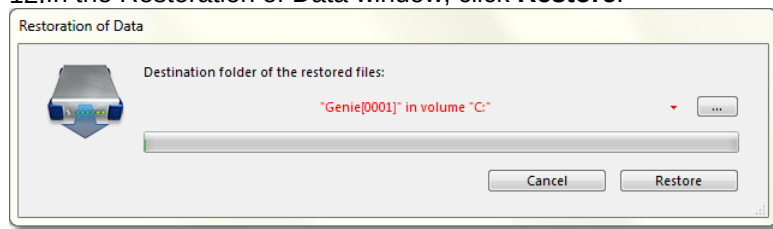
7. Click the **Next >** button.
8. Click the **Install** button and allow the application to complete the installation.
9. Inside the 'GenieRestore' folder that you have created, double-click on the Genie Solo application and immediately press and hold the **Alt** key on your keyboard.
10. When the 'You pressed the "Alt" key' window appears, select *Restore a Backup* and click **Continue**.



11. You will be prompted to select a 4D backup file. It will be in the format of Genie[XXXX].4BK and will be located in your backup folder location. Navigate to this location, select the backup file and click **Open**.



12. In the Restoration of Data window, click **Restore**.

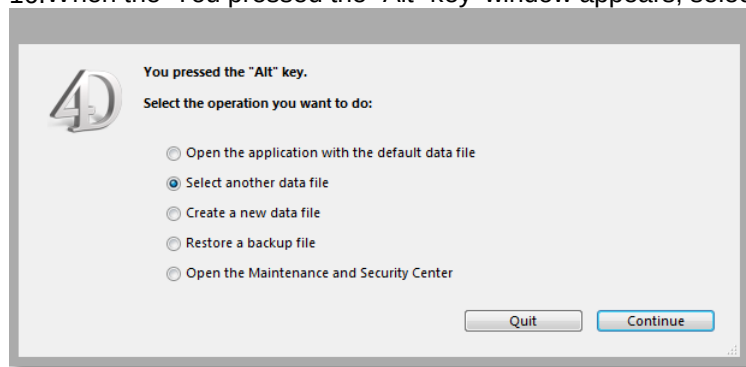


13. A folder will be created in the same location as the Genie[XXXX].4BK file called Genie[XXXX]. This will contain your restored Genie data file (i.e. Genie.4DD).

14. Copy the Genie.4DD file from your backup location and paste this file into the 'GenieRestore' folder that you have created.

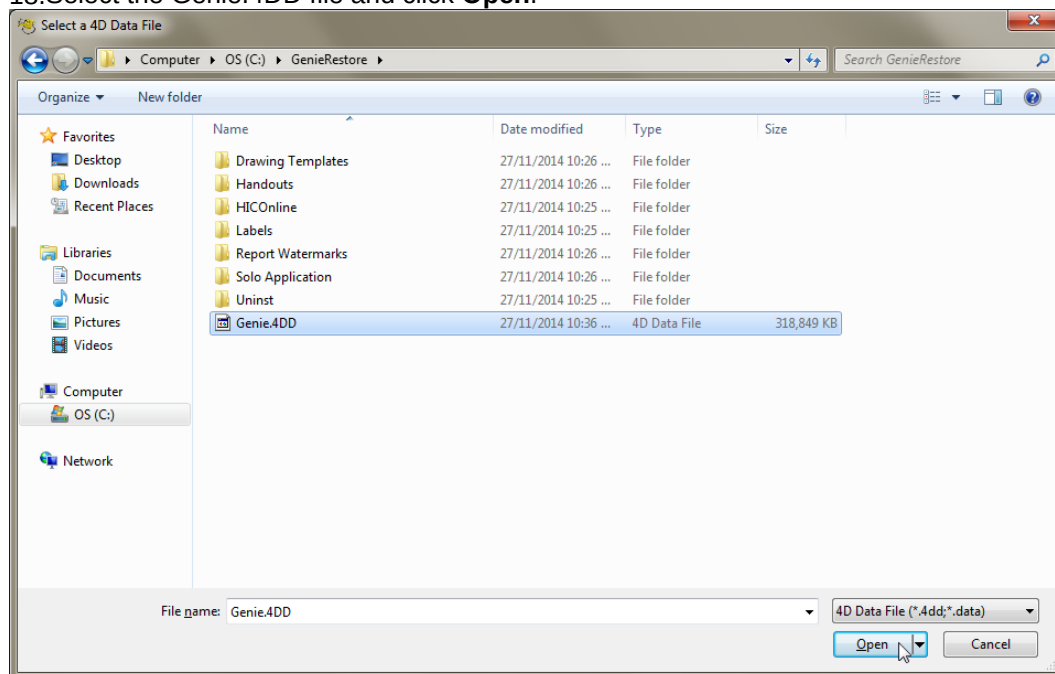
15. Inside the 'GenieRestore' folder that you have created, double-click on the Genie Solo application and immediately press and hold the **Alt** key on your keyboard.

16. When the 'You pressed the "Alt" key' window appears, select *Select another data file* and click **Continue**.



17. Navigate to the 'GenieRestore' folder that you have created.

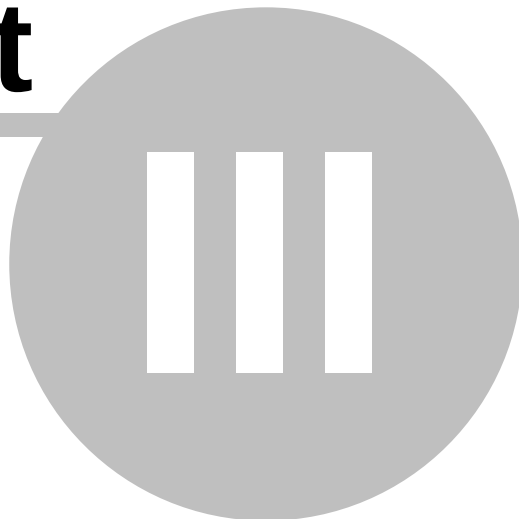
18. Select the Genie.4DD file and click **Open**.



19. Use the data file to make sure that it contains the data you require or as a reference.

When you are finished with this restored data file and no longer require it, you should delete it from the computer to prevent accidentally entering data into the incorrect data file.

Part

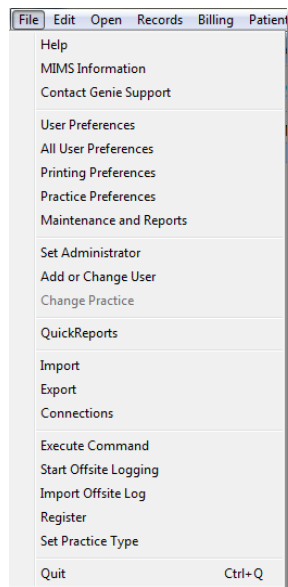


Menus Overview

3 Menus Overview

The following section outlines the function of each of the main menus within Genie.

3.1 The File Menu



Help

This opens the Genie contextual help window. The contextual help window draws on the online manual from the Genie website, so you will need an active internet connection to access this. The contextual help feature will try to provide you with an appropriate link to the manual relative to the window you currently have open in Genie.

Clicking on the address line at the bottom of the window opens the link to the Genie manual in your default browser. This will only work for the first page you opened when going to **File > Help**. Browsing in the contextual Help window then clicking on the address line will not open the currently viewed page.

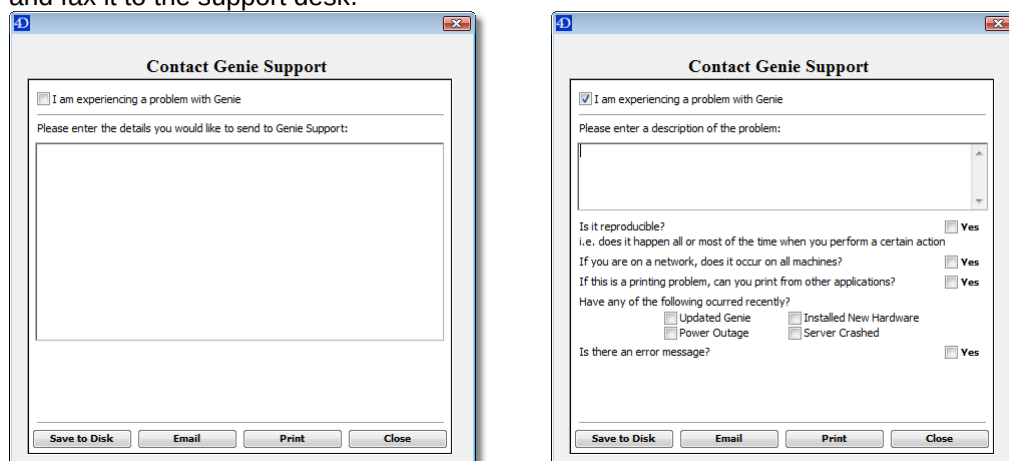
Only one Help window will open at a time. If the Help window is already open and you select it from the File menu again, the displayed page will change to the relevant Help page.

MIMS Information

Displays the currently installed version of MIMS and the MIMS disclaimer. It also contains information on how to contact MIMS to subscribe to this service, as well as a link to the price list available on their website.

Contact Genie Support

Selecting this option opens a window allowing you to contact Genie Support through Genie directly. You have the option to **Save to Disk** so you can attach your request as a TXT file in an email program outside of Genie, **Email** the request directly from Genie (provided that you have the [Genie Email module](#) set up), or **Print** this information and fax it to the support desk.



This contact method can be used to submit feature requests and general queries. Alternatively, if you tick *I am experiencing a problem with Genie*, you will be presented with additional options that allow you to provide information about the issue you are experiencing.

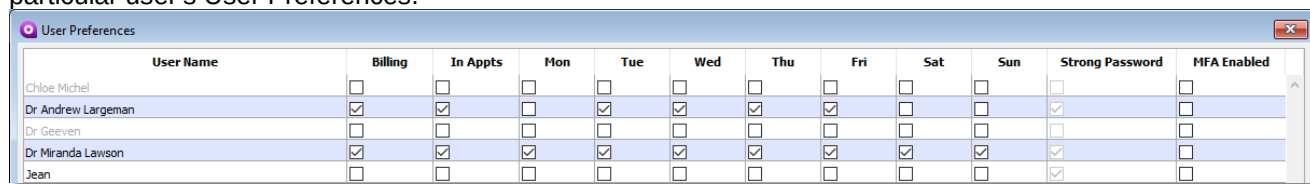
Note: This is the preferred method for contacting the Genie support team as Genie automatically gathers information about the operating system and version of Genie you are using.

User Preferences

Opens the preferences record for the user currently logged in. See [User Preferences](#) for more information.

All User Preferences

Opens a window listing the preferences records for all users, allowing you to double-click to open and edit a particular user's User Preferences.



User Name	Billing	In Appts	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Strong Password	MFA Enabled
Chloe Michel	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Dr Andrew Largeman	☒	☒	☐	☒	☒	☒	☒	☐	☐	☒	☐
Dr Geeven	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Dr Miranda Lawson	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☐
Jean	☐	☐	☐	☐	☐	☐	☐	☐	☐	☒	☐

At a glance, you are able to see which users are listed in the billing menu and in the Appointment Book; these are represented by the tickboxes *Billing* and *In Appts*, respectively. The days (if any) that the user is shown in the Appointment Book are also determined by those selected in this window. Users who have the *Modify Other Users' Preferences* option selected in the Edit Groups window are able to modify any of this information where needed. See [Security](#) for more information.

This window will display all users, with any users ticked as *Inactive* being displayed in grey. These inactive patients can be hidden from the list entirely by ticking the *Hide All Inactive Users* tickbox.

The *Strong Password* column indicates that the user has a strong password; a 'strong' password is considered to be one that:

- Contains at least eight characters.
- Contains at least one upper-case letter.
- Contains at least one number.

The right-most column, *MFA Enabled*, will be visible only to GenieWeb users. This column indicates whether users are using Multi-Factor Authentication for their GenieWeb logins. For more information GenieWeb's password standards and MFA functionality, please see the [GenieWeb: Security & MFA](#) PDF guide, which can also be downloaded from the PDFs tab in **File > Software Updates**.

Printing Preferences

Opens the Printing Preferences for the current computer. See [Printing Preferences](#) for more information.

Practice Preferences

Opens a list of practices, you can double-click to edit the Practice Preferences for that practice. See [Practice Preferences](#) for more information.

Maintenance & Reports

Opens the Maintenance & Reports window. See [Maintenance & Reports](#) for more information.

Set Administrator

Allows the current administrator to assign another user as the administrator of Genie. This option will be greyed out if you are not the administrator. See [Security](#) for more information.

Add or Change User

Opens the Login window allowing you to log in as a different user, change passwords, and add or delete users from the database. See [Security](#) for more information.

Change Practice

This item will be enabled if you have more than one Practice Preferences record. It allows you to change to another practice so that you can use its settings (such as the letterhead) if you would like to create invoices under a different practice name. Changing to a different practice only effects the computer you are using. Other users on the network will be unaffected.

Quick Reports

Quick Reports allow you to search the Genie database to compile specific reports which you can print, export or preview. See [Quick Reports](#) for more information.

Import and Export

Please contact Genie Support (support@geniesolutions.com.au) for further assistance.

Connections

Allows the setup of automatic exchange of new and modified demographic data with other applications. See Connections (Online Manual only).

Execute Command

This opens a window that allows you to enter lines of code to manipulate data in your database.

Note: This should only be used under instruction from the Genie Support desk.

Start Offsite Logging

Can be used to manually start offsite logging. See [Offsite Logging](#) for more information.

Import Offsite Log

Used to manually import Offsite Logs, if required. See [Offsite Logging](#) for more information.

Register

Allows you to register Genie by entering a registration code supplied by the support desk.

Set Practice Type

This allows you to specify the type of practice. Genie will automatically displays different information and switch on some features and functions required by that type of practice.

Quit (Windows only) (Ctrl+Q)

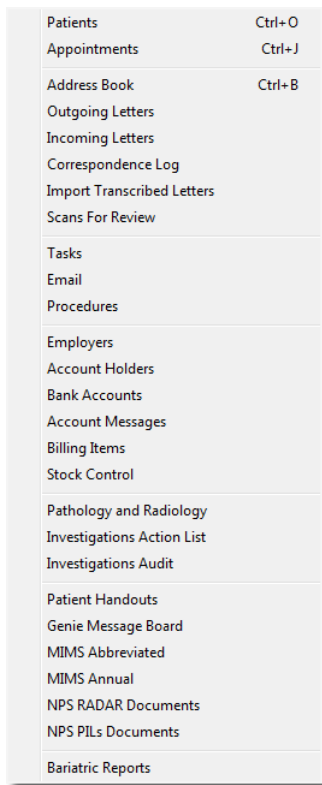
Quits Genie. Clicking the red cross in the top right of the screen is NOT recommended, as it does not allow the database exit routines to run.

Note: Disable Main Window Close Box in the General tab of User Preferences prevents you from quitting Genie via the red cross completely; it is recommended that you have this preference selected to avoid exceeding your simultaneous users limit.

The *Quit* option is not listed in the File Menu on a Mac, to quit Genie on a Mac:

- Select Quit from the Genie Client menu i.e. **Genie Client > Quit**
- Select Quit from the Genie menu i.e. **Genie > Quit**

3.2 The Open Menu



Patients (Ctrl+O)

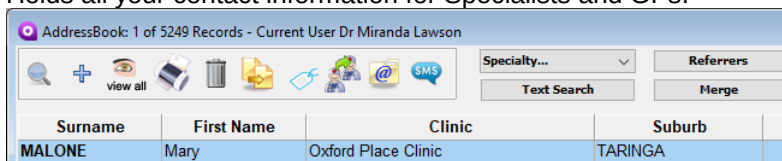
This will open the Patients List; inactive patients are displayed in grey, flagged patients are displayed in red. Right-clicking on a patient's name in this window will display a drop-down menu allowing you to quickly perform common tasks (e.g. open the Patient Demographics window, copy their name for pasting into the Appointment Book, invoice or receipt a patient, SMS the patient, or open their Clinical Window). To print a list of patients, see the [Report Builder](#) section.

Appointments (Ctrl+J)

Opens the Appointment Book. For more information, please refer to the [Appointments](#) section.

Address Book (Ctrl+B)

Holds all your contact information for Specialists and GPs.



The **Copy Selected Record** button  allows you to create a new Address Book record that contains the same details as another doctor in your Address Book. It will copy all details except for the selected doctor's name and provider number; this includes their correspondence information. This could be useful for practices that have several doctors with the same address details.

The **Export Selected Records** button  allows you to export selected records in your Address Book to either Outlook or Apple's Address Book application. You have the option to export only email addresses or all the information.

The **Merge** button allows you to merge two Address Book records. Highlight the two records and click on **Merge**.

The **Specialty...** drop-down menu allows you to view all providers in your Address Book with a particular specialty (e.g. Anaesthetist).

The **Text Search** button allows you to perform a free text search for any word or phrase contained anywhere in

Address Book records.

The **Referrers** button allows you to search for referring doctors for all or select providers at your practice.

New records can be added via the **Blue plus** icon .

Enter in the doctor's details and assign their appropriate Category and/or Specialty. This is particularly relevant for your Anaesthetists if you wish to reference them in your Procedure records. Assistants need to have the *Assists at Operations* checkbox ticked at top right of the window so they can be referenced in Procedures and Billing. It is also important to mark your doctors as either GP or Specialist in the *Category* drop-down. This determines their referral duration as being either 12 or 3 months, respectively, when adding them as a referring doctor to a patient.

If you require the addressee's fax number to be printed when they are added to a letter as a CC, tick the *Include Fax when adding CC* tickbox.

The  symbol allows you to locate the address on Google Maps.

The **Letters** button will display all of the letters that have been addressed to this provider in the Outgoing Letters window. This will not display letters where the provider was marked as a CC.

The **Red Quill**  icon will open a window where you can view and create letters to the provider that are not in relation to a particular patient. In the Select a letter window, double-click on an existing letter in this list to view the contents. To create a letter, click the **Add** button, type the letter as required, type a name for the letter in the *Subject* field and click **Save**. You can alter the letter template for these letters by clicking the **Edit Template** button in the new letter window.

The **Correspondence** tab allows you to enter the doctor's preferred method of communication details if they use a third-party carrier to send and receive correspondence. Additionally, you can enter in the doctor's *Carrier Identifiers* in this window.

The screenshot shows the 'New Record' window with the 'Correspondence' tab selected. The form includes the following fields and options:

- Health Provider Identifier (Individual): [Text Field]
- Health Provider Identifier (Organisation): [Text Field]
- Preferred Method of Communication: [Dropdown Menu]
- CARRIER IDENTIFIERS**
 - Healthlink: [Text Field]
 - Medical Objects: [Text Field] *Usually the same as the Provider Number*
 - ArgusConnect: [Text Field] *an email address*
 - Alltalk/EQuery: [Text Field]
 - DivisionReport: [Text Field]
 - ReferralNet: [Text Field] *Usually the same as the Provider Number*
- ☐ Include RTF in letters
- ☐ Include PDF in letters
- ☐ Can Receive CDA Format

At the bottom of the window, there is a 'Letters' button, a set of navigation arrows, and 'Cancel' and 'Save' buttons.

The Health Provider Identifier(s) have been assigned to each provider and their clinic by Medicare, these are a universal way of identifying a doctor's details/location.

The *Include RTF* and *Include PDF* in letters checkboxes control the layout and format of outgoing letters. The recipient's ability to receive RTF and PDF letters will depend on the practice management software used. On Windows, there must be at least one Postscript compatible printer installed on the computer set to send letters electronically in PDF format, in conjunction with the *Include PDF* preference being ticked. On Macintosh, the PDF creation of the outgoing letter will occur automatically when the *Include PDF* preference is ticked. You should check with the recipient to ensure their software is capable of receiving messages in RTF or PDF format. If no preference is ticked, the letter will be sent in plain text format only.

Outgoing Letters

Accesses the Review Correspondence window so you can review your outgoing letters before they are sent. See [Reviewing Correspondence](#) in the Clinical section.

Incoming Letters

Accesses your letters that have come in from other doctors via third party carriers (such as Healthlink etc.) so you can check and link them. See [Checking Imported Letters](#) in the Electronic Correspondence section.

Correspondence Log

Keeps track of all incoming and outgoing letters sent electronically via a third party. See [Electronic Correspondence](#).

Importing Transcribed Letters

Opens the Import Letters window, which allows you to import remotely typed letters. See [Importing Remotely Typed Letters](#) in the Patient Correspondence section.

Scans for Review

Allows the electronic review of batch scanned documents/images. When linking a scanned image to a patient's file, you can right-click in the *To be Reviewed By* column to assign a reviewer.

Date	Description	Patient	To Be Reviewed By
14/07/2009	Chrysanthemum.jpg	Samantha STATE	
14/07/2009	Desert.jpg	Bryan ADAMS	
14/07/2009	Hydrangeas.jpg	Anna LEE	
14/07/2009	Jellyfish.jpg	Barry EMERALD	
14/07/2009	Koala.jpg	Bryan ADAMS	
14/07/2009	Lighthouse.jpg	Glenda MARCH	
14/07/2009	Penguins.jpg	Andrew STATE	
14/07/2009	Tulips.jpg	Ella BROWN	

Chloe Michel
Dr Andrew Largeman
Dr Geeven
Dr Miranda Lawson
Samantha Chambers

This will create an entry in the Scans for Review section ([Open > Scans for Review](#)).

Date	Name	Patient	Redirect To	Reviewed
15/02/2013	Chrysanthemum.jpg	Samantha STATE	Dr Andrew Largeman	☐
14/07/2009	Jellyfish.jpg	Bryan ADAMS	Dr Andrew Largeman	☐
14/07/2009	Koala.jpg	Barry EMERALD	Dr Andrew Largeman	☐

Providers can then tick *Reviewed*, or right-click in the *Redirect To* column to redirect to another provider. Whenever there are scans waiting, you will see Scans to Review as an entry in the navigation palette.

Scans to Review

Tasks

Tasks allow you to communicate internally with other users. For more information see [Tasks](#) in the Reception Module.

Email

Opens the Genie email module. For information on using Email within Genie, please refer to the [Email](#) section.

Procedures

Displays a list of patients who have a procedure created for them. For more information on Procedures, please refer to the [Procedures](#) chapter.

Employers

Displays a list of all Employers recorded for patients.

Employer: 4 of 4 Records - Current User Dr Miranda Lawson						
Name	Suburb	Phone1	Phone2	Fax	Email	Insurer
Australia Post						
Brisbane City Council						
Coles Myer Group						
Genie Solutions						

These records are usually created via WorkCover claims. For more information, refer to [Invoicing WorkCover](#).

Account Holders

Opens up the Account Holders window.

AccountHolder: 40 of 40 Records - Current User Dr Miranda Lawson						
Name	State	Suburb	Balance	Acct ID	Last Payment	
ACA Health Benefits	NSW	Wahroonga	0	13	00/00/00	
Australian Health Management	NSW	Matraville	0	11	00/00/00	
Australian Unity Health	South A		0	12	00/00/00	
CBHS Friendly Society	NSW	Parramatta	0	9	00/00/00	
Central West Health Cover	NSW	Lithgow	0	14	00/00/00	
Citizen, Jane	QLD	ROCKLEA	0	37	00/00/00	

This displays a list of all patients and organisations who have had an Account created for them. Before a patient, Health Fund or Organisation can be billed, they must have an Account Holder record. Double-clicking a record (or clicking the  icon to create a new record) will allow you to modify the account holder's contact details, as well as configure them for BPAY and WorkCover Online (if applicable).

Bank Accounts

Provides a list of all Bank Accounts entered into Genie.

BankAcct: 3 of 3 Records - Current User Dr Miranda Lawson



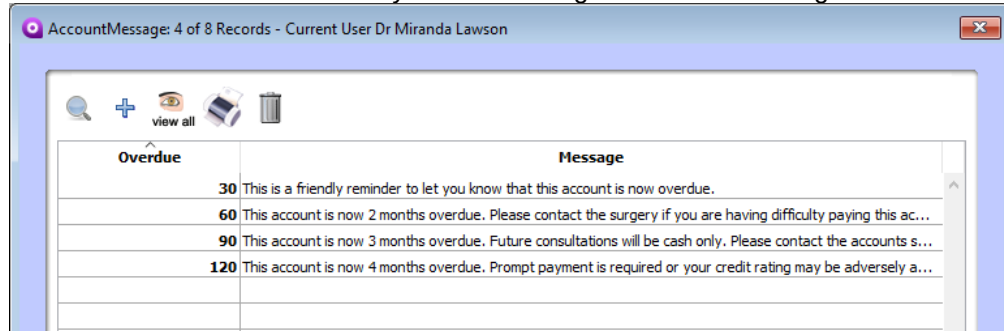
Code	BankName	BSB	Account Name	Account Number
CWB	Commonwealth Bank	323497	Genie Medical Centre	4937 6234
SNC	Suncorp Bank	484799	Miranda Lawson	043471532
Z	Dummy Account			

This window allows you to edit the details of pre-existing Bank Accounts, as well as **Add**  or **Delete**  Bank Accounts. Default bank accounts for each user can be set in User Preferences once they have been added.

Account Messages

Allows you to set the Account Messages, which will be automatically displayed on statements created for overdue invoices. You can modify or add messages and overdue lengths as needed.

AccountMessage: 4 of 8 Records - Current User Dr Miranda Lawson



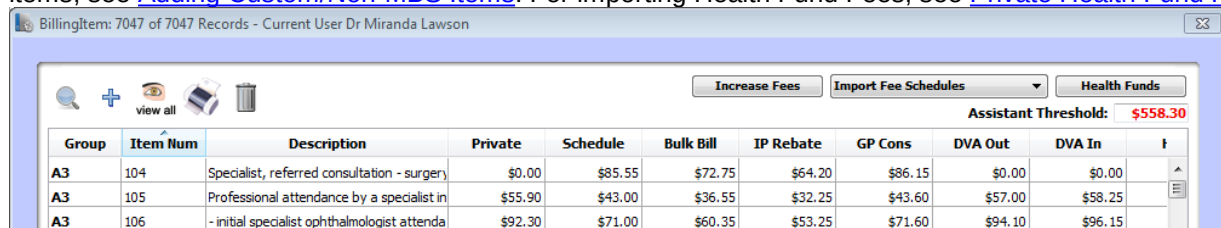
Overdue	Message
30	This is a friendly reminder to let you know that this account is now overdue.
60	This account is now 2 months overdue. Please contact the surgery if you are having difficulty paying this ac...
90	This account is now 3 months overdue. Future consultations will be cash only. Please contact the accounts s...
120	This account is now 4 months overdue. Prompt payment is required or your credit rating may be adversely a...

For more information on overdue invoices, please see the [Unpaid Invoices](#) section of this manual.

Billing Items

Opens the Billing Items window. To see how to print a list of Private fees, see the [Report Builder](#) section. For information on how to create, set or increase fees, see [Increasing Fees](#). For information on creating custom items, see [Adding Custom/Non-MBS Items](#). For importing Health Fund Fees, see [Private Health Fund Fees](#).

BillingItem: 7047 of 7047 Records - Current User Dr Miranda Lawson



Group	Item Num	Description	Private	Schedule	Bulk Bill	IP Rebate	GP Cons	DVA Out	DVA In	I
A3	104	Specialist, referred consultation - surgery	\$0.00	\$85.55	\$72.75	\$64.20	\$86.15	\$0.00	\$0.00	
A3	105	Professional attendance by a specialist in	\$55.90	\$43.00	\$36.55	\$32.25	\$43.60	\$57.00	\$58.25	
A3	106	- initial specialist ophthalmologist attenda	\$92.30	\$71.00	\$60.35	\$53.25	\$71.60	\$94.10	\$96.15	

Assistant Threshold: \$558.30

Stock Control

Opens the Stock Control module which allows you to add and manage stocked items. For more information, see [Stock Control](#).

Pathology & Radiology

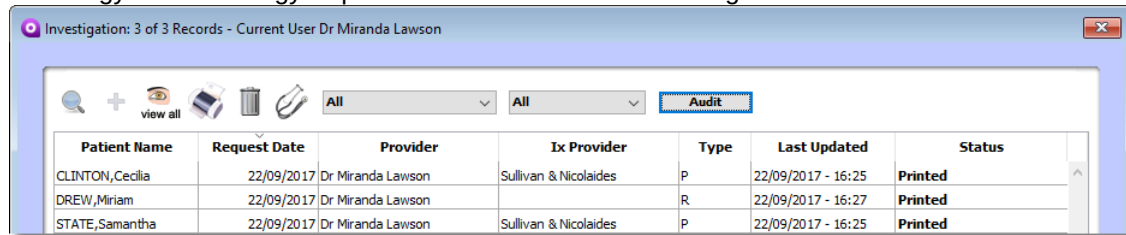
Accesses a list of downloaded results. For more information, please refer to [Pathology and Radiology Results](#).

Investigations Action List

Opens a list of pathology results that have been marked as requiring further action. For more information, please refer to [Pathology Recalls](#).

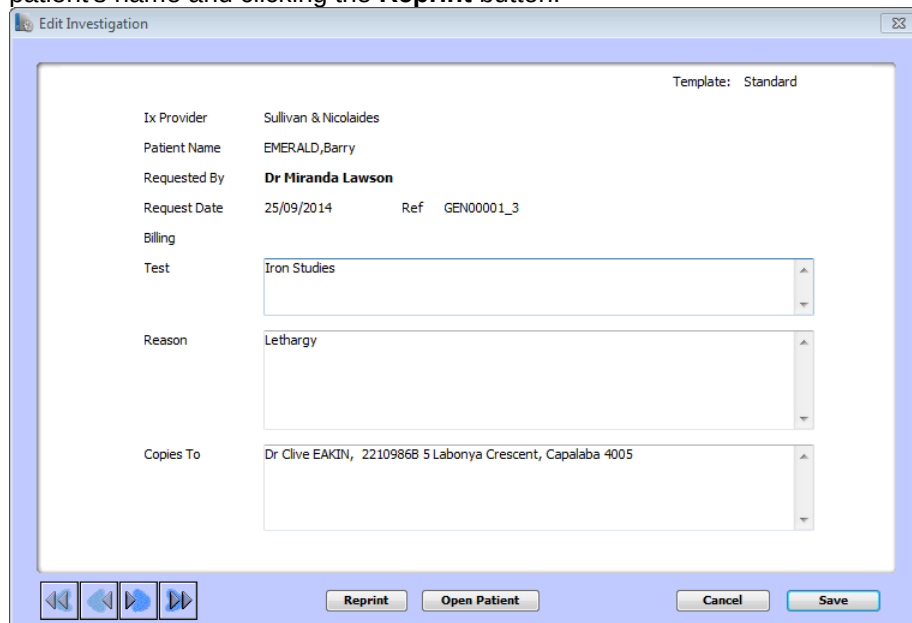
Investigations Audit

Pathology and Radiology requests are recorded in the Investigations Audit window.

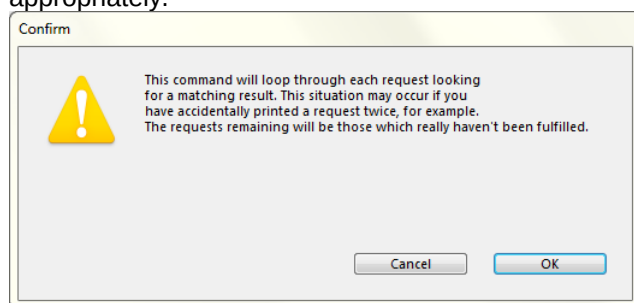


Note: Pathology and radiology requests are only retained in the Investigations Audit window for 12 months from the date the request was made.

If a patient has misplaced their request form, you can re-print the ordered tests by double-clicking on the patient's name and clicking the **Reprint** button.



You should regularly check that your requested tests have been performed by clicking on the **Audit** button. This will cause Genie to check each request for a matching result. For requests which do not have a matching result, it should be assumed that the patient has not had the requested test performed, and it should be followed up appropriately.



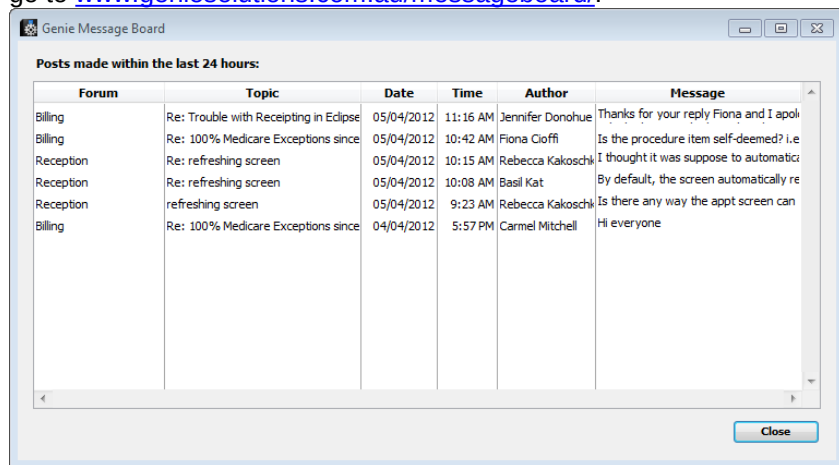
Note: This audit only checks Pathology requests as the results can be tracked by an internal identifier that matches the request to the result. As Radiology requests do not use this system, the requests need to be audited manually.

Patient Handouts

Allows you to access stored patient handouts (e.g patient information sheets) which have been created in another program (e.g. Microsoft Word), on either the Client machine or on the Server. Storing the handout on the Server will allow all users to have access to the handout, while storing the handout on the Client only allows access from that machine. Documents need to be saved in the Handouts folder within the Genie folder on either machine.

Genie Message Board

Opens a window displaying all messages posted in the last 24 hours. To subscribe to the Genie Message Board, go to www.geniesolutions.com.au/messageboard/.



Double-clicking on a message open the message in a new window within Genie. From here you can click on the **Open in Message Board** button it will open the Message Board in your default internet browser. If you have not recently logged onto the Forum, you will be required to do so.

Right-clicking on the message will allow you to either view the full message in a separate window, or to open the Message Board log to view this message.

MIMS Abbreviated

Provided you have a current subscription with MIMS, this opens the MIMS Abbreviated window allowing you to search for specific drug information, without having to access a patient's Clinical Window.

MIMS Annual

Provided you have a current subscription with MIMS, this opens the MIMS Annual in your internet browser providing you with detailed drug information.

NPS RADAR Documents

Provides evidence-based information on new drugs, research and PBS listings and is published by the National Prescribing Service (NPS), for health professionals. For more information see [NPS RADAR Documents](#).

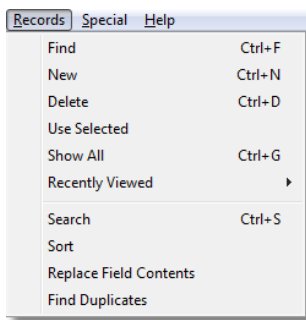
NPS PILs Documents

Allows you to access Patient Information Leaflets (PILs) which have been provided by NPS as a practical help in communicating essential treatment messages to patients. For more information see [NPS PILs Documents](#).

IVF Treatment Cycles

Becomes active when your Practice Type is set to Obs/Gynae/IVF Specialist.

3.3 The Records Menu



The items in this menu allow you to manipulate the records of the table currently on display.

Note: This menu is not available from the Appointments screen.

Find, New and Delete (Ctrl+F, Ctrl+N, Ctrl+D)

Locate, create or delete a record in the window you have open.

Use Selected

Use Selected reduces the records on display to just those which are highlighted. For example, you may want to print a label for John Smith. So you would do a search for 'Smith J' and be presented with perhaps 20 records. If you print a label while all 20 records are on display Genie will print a label for each of these records. In this case, highlight the one record you would like, select **Records > Use Selected**, and then print the individual label. You can highlight several records by holding down **Ctrl** on your keyboard and clicking on each of the records (**Ctrl+clicking**) or you can select a group by clicking on the first record, holding down the **Shift** key on your keyboard click on the last record (**Shift+clicking**).

Note: These two methods of highlighting multiple items are able to be used in many areas of Genie, and indeed most computer programs.

Show All (Ctrl+G)

This will display all the records for the current table on display. Alternatively, you can use the **View All Records**

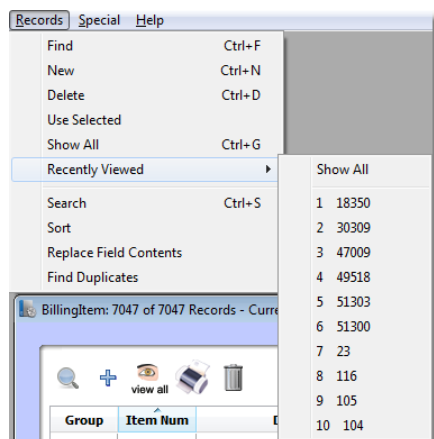
button  view all .

Recently Viewed

This will display the 10 most recently viewed records from the window that is currently open. This option is available in the following windows:

- Billing Items
- Patients
- Address Book
- Bank Accounts
- Email Address Book
- Investigations Audit
- Postcodes
- Sales Audit

Clicking on either the *Show All* option or one of the options numbered 1 to 10 will show the relevant record/s in the window.



The recently viewed items are user specific and will be cleared upon switching users, as well as each time that the Genie application is quit.

Replace Field Contents

Allows you to replace the contents, or part of the contents, of any field in all of the records currently on display. This can be a very useful, but dangerous feature and should be used with care. Only the Administrator has access to this feature and should contact Genie Support if they wish to use it.

Search (Ctrl+S)

Allows you to make very precise and/or complex searches of your data. The Query Editor allows you to do a search on the relevant table depending on which window you have open in Genie. See the chapter on [Queries & Searches](#) for more information on searches.

Sort

Sort allows you to perform multiple sorts on the records displayed. To perform a simple sort, you can click on the columns in the window e.g. by *Date of Birth*, click on the DOB header in the Patients list.

Find Duplicates

This allows you to find duplicate patient or Address Book records. You might use this after converting data from another program where duplicate records may have been created.

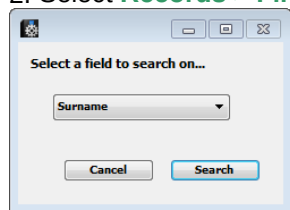
Example: Find duplicate patient records

We will search on the *Surname*, *First Name* and *DOB* fields.

1. Click on the **View All** button to display all the records in the database.

Note: If you have very large patient database, it is recommended you do this in sections. You could first find all those patients whose surname begins with 'A' for example.

2. Select **Records > Find Duplicates** to open the window shown here.



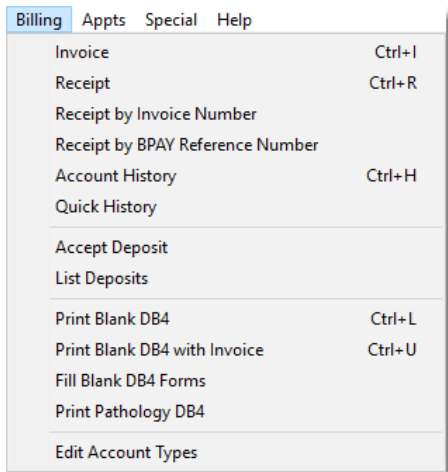
3. Select Surname from the drop-down menu, then click on the **Search** button. This will display all records where more than one patient has the same surname. If you started with 10,000 records you'll probably still have about 8,000 records on display.

4. Repeat the above steps using the *First Name* and *DOB* fields to progressively narrow the search. When finished, if there are any duplicate records in the database they will be displayed on screen.

5. Highlight the relevant records and merge them using the **Patients > Merge Patients** menu item. Only two records can be merged at a time.

See the chapter on [The Patients Menu](#) for more information for more information on merging.

3.4 The Billing Menu



Invoice (Ctrl+I)

Allows you to create an invoice for a patient or organisation. See the chapter on [Invoicing](#) for more information.

Receipt (Ctrl+R)

Allows you to receipt a payment for a patient or organisation. See the chapter on [Receipting](#) for more information.

Receipt by Invoice Number

This allows you to receipt by searching for the invoice number rather than first finding the correct patient or account holder.

Receipt by BPAY Reference Number

Allows you to enter an account holder's BPAY CRN to receipt any outstanding debts for that account holder.

Account History (Ctrl+H)

Allows you open the account history for a patient or organisation. See the chapter on [Account History](#) for more information.

Quick History

This will display a list of all items billed to the highlighted patient during the past two years, including the number of times it has been billed and the date it was last billed. This is useful for checking Medicare item numbers which are only permitted to be billed a certain number of times in any two year period.

IMC Invoice Wizard (Ctrl+Shift+I)

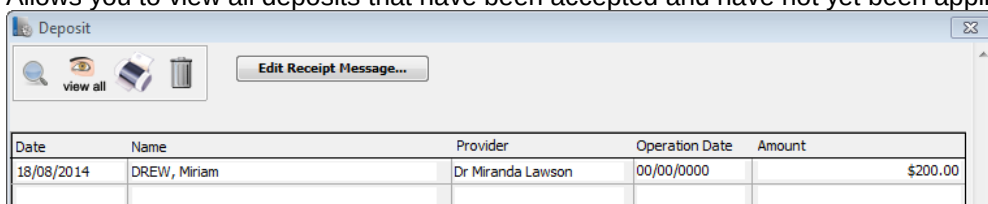
This allows you to create an invoice for ECLIPSE (online health fund claiming for inpatient services). This will only be available to practices who have registered for ECLIPSE. To register for ECLIPSE, contact Genie Solutions. Those registered will have received a separate ECLIPSE manual at their install/training for ECLIPSE or you can access it through **Special > Software Updates** in the **PDFs** tab.

Accept Deposit

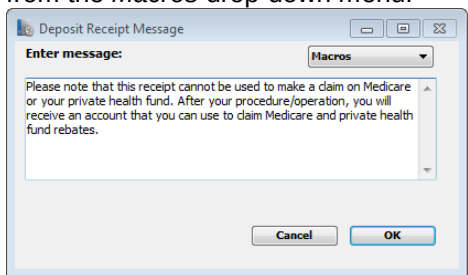
Allows you to accept deposits for a selected patient. See the chapter on [Accepting a Deposit](#) for more information.

List Deposits

Allows you to view all deposits that have been accepted and have not yet been applied to an invoice.



From this window you can modify the message that prints at the bottom of the deposit receipt by clicking on the **Edit Receipt Message** button, editing the message and clicking **OK**. To return to the default message, **Alt+click** on the **Edit Receipt Message** button. If you have macros enabled (see [Macros](#)), you can select them from the *Macros* drop-down menu.

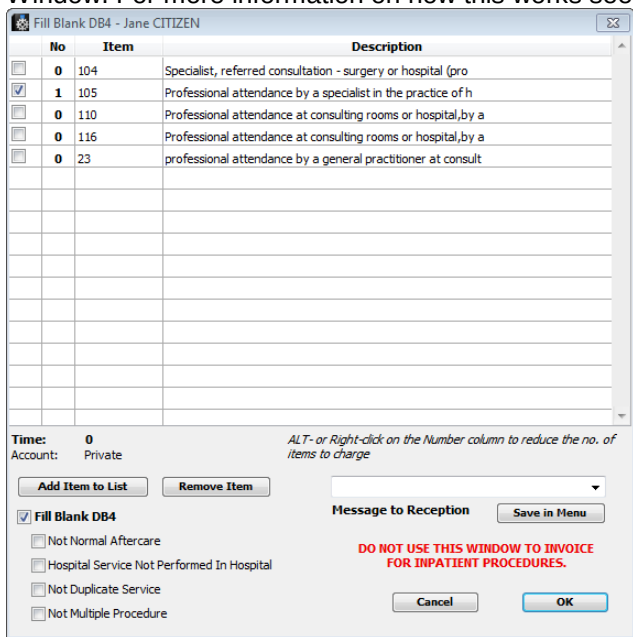


Print Blank DB4 (Ctrl+L)

Prints a blank DB4 form for the highlighted patient. This allows the doctor to fill in the item number to charge during or after the consult, and the patient can sign the form. This does not create any billing records in Genie. The invoice to Medicare would still need to be added to Genie at a later time. Since you already have a signed DB4, you would deselect the Medicare DB4 checkbox in Printing Preferences (**File > Printing Preferences**) to avoid printing out an unnecessary extra DB4 form.

Print Blank DB4 with Invoice (Ctrl+U)

Prints a blank DB4 form and also creates the invoice. The invoice will have no items on it until the doctor selects the item and ticks the box to *Fill Blank DB4* in the window that comes up when they save out of the Clinical Window. For more information on how this works see [Specifying a Fee to Charge](#) in the Clinical section.



If the doctor does not use this feature, you would select **Billing > Fill Blank DB4 Forms** to enter the item number to be charged, as per whatever the doctor has written on the blank DB4.

Fill Blank DB4 Forms

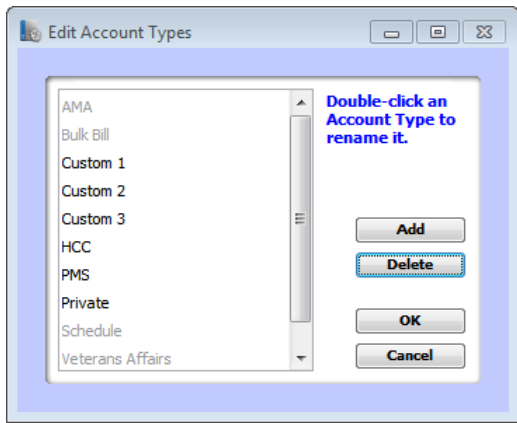
Used in conjunction with 'Print Blank DB4 with Invoice', as described above. Selecting this option will open a list of all invoices awaiting entry of an item number. Double-click on each item to open and enter the item number. Only one item number can be entered from this window.

Print Pathology DB4

This prints a pathology DB4 form to be sent to the pathology lab. For example, for a specimen request so that the lab has a signed DB4 form for the patient.

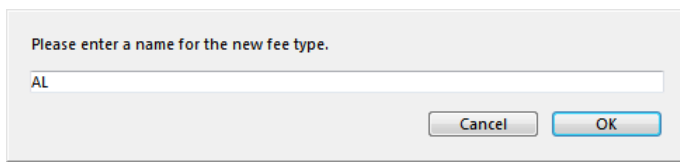
Edit Account Types

Allows you to edit the Account Types available for assigning to patients' accounts.



Account types that cannot be edited are greyed out, however, all other account types names are editable.

In addition to editing existing account types, it is possible to create new account types by clicking on the **Add** button and entering the new account type name. In the example below, we have used the doctor's initials to create an account type for the private fee (s)he charges.

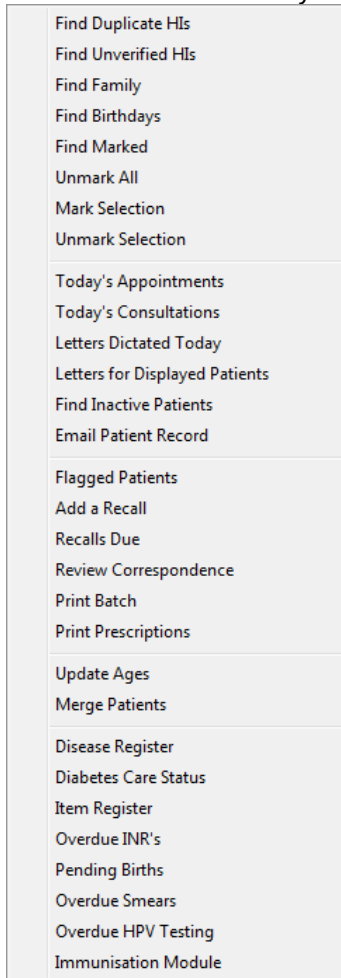


Once you have created the new account type, you should use the [Increase Fees](#) function to set the fees.

Note: You should ensure that no one is attempting to do any billing when you attempt to make changes to account types.

3.5 The Patients Menu

The Patients menu is only available when the Patients List is open.



Find Duplicate HIs

Will search and display patients that have the same HI number recording in their Patient Demographics window.

Find Unverified HIs

Will search and display patients that have a HI number that has not been verified.

Find Family

This allows you to highlight one patient record and find other family members. The other family members must have the same Account ID as the original patient. That is, they all have the same Account Holder. **Alt+clicking** on this menu item will display patients with the same Chart Number. **Ctrl+clicking** on this menu item will display patients with the same Medicare Number.

Find Birthdays

Displays patients with birthdays that fall within a specified date range. You can also narrow your search by selecting to run the search for only a specific provider. However, this will only display those patients that have this provider selected as their usual provider in their Patient Demographics window.

Find Marked

There is a *Marked* check box in each patient's Clinical Window. This will display a list of all patients that have the *Marked* check box ticked.

Unmark All

This will untick the *Marked* check box of all patients in your database.

Mark Selection

This will tick the *Marked* check box in the patient's Clinical Window of the patients currently displayed in your

You can select the patients that you wish to mark by highlighting them and using the **Record > Use Selected** function. This can be useful when performing searches that require multiple searches on the patient database. You can search for the marked patients when performing a search by selecting 'Marked', 'is equal to', 'True'.

Unmark Selection

Today's Appointments

Today's Consultations

From: 05/04/2012 To: 05/04/2012

☒ All
☐ Select

Cancel OK

[illegible]

Letters Dictated Today

Letters for Displayed Patients

40

Print Batch

Prints out prescriptions that was batched to be printed later for the highlighted patient. See the chapter on [Prescribing](#) for information.

Print Prescriptions

This allows you to print prescriptions for a group of people e.g. antibiotics for post surgery. Find the people you would like to print the scripts for, so that only those patients are on display. Once you select this item it will ask which scripts you would like to print for the selected patients. The list you are presented with is the list of scripts you have in your [QuickScript](#) menu.

Update Ages

Updates the patient's Age field for each of the displayed patient records. The Age field is automatically calculated from the Date of Birth when a patient record is created and is updated whenever the Patient Demographics or Clinical Windows are opened.

Note: If a patient hasn't been seen for some time, their recorded age may be incorrect. If you perform a search based on ages then the results of your search will be inaccurate unless you perform this update first.

Merge Patients

If you find you have inadvertently created two records for the one patient, highlight the two duplicate records and then select Merge Patients. The information from the two records will be merged into one record. This procedure will also combine all images and scanned documents for the two patients.

Note: To highlight two records, click on the first record and then Shift+click on the second, so that both records remain highlighted.

Disease Register

This function is available if your practice type (**File > Set Practice Type**) is set to General Practice, Obs/Gynae/IVF Specialist, Rheumatology, Dermatology, or Other Specialty.

Opens the Disease Register Module. See Disease Register (Online Manual) in the Clinical module for more information.

Diabetes Care Status

This function is available if your practice type (**File > Set Practice Type**) is set to General Practice, Rheumatology, Dermatology, or Other Specialty.

See Diabetes Care Status (Online Manual) in the Clinical module for more information

Item Register

This function is available if your practice type (**File > Set Practice Type**) is set to General Practice, Obs/Gynae/IVF Specialist, Rheumatology, Dermatology, or Other Specialty.

Opens the Item Register Module for the patients on display in the Patients List. The Item Register allows for the easy monitoring and tracking of when a patient was last billed a tracked item number. It is particularly useful for GP Management Plan items that can only be billed once a year. If searching for certain patients only eg. >75years old then perform the search in **Open > Patients, Records > Search** first, before going to **Patients > Item Register**.

Surname	First Name	Age	Sex	Provider	721	723	732	Last CP Item	Last HA Item	10997 this Cal. Yr.
ADAMS	Bryan	47	M	Dr Miranda Lawson	19/04/2012			721 on 19/04/2012		
BROWN	Ella	29	F	Dr Miranda Lawson		19/04/2012		723 on 19/04/2012		
CHRISTIAN	Greg	82	M	Dr Miranda Lawson			19/04/2012	732 on 19/04/2012	Eligible by age	
CITIZEN	Jane	61	F		19/04/2012			721 on 19/04/2012		
DREW	Miriam	67	F				19/04/2012	732 on 19/04/2012		
EMERALD	Barry	28	M							
FRANKLIN	Amanda	36	F							
GRISSHOLM	Gerald	61	M							

The **Create a Recall** button allows you to create a recall record for the highlighted patient. The **Show in Patients List** button displays the highlighted patient's records in the Patient List. The **Add Task** button allows you to add a new task on the selected patient.

The **Add Item to Track** button allows you to add item numbers to the Register in order for them to be tracked. Alternatively, you can right-click in the column of an item number and add or delete items.

Item Register (8 patient records)

Create a Recall Show in Patients List Add Task Add Item to Track Care Plan Items: 721, 723, 725, 727, 732 Health Assessment Items:

Right-click in an item column to add or delete a tracked item.

Surname	First Name	Age	Sex	Provider	721	723	732	Last CP Item	Last HA Item	10997 this Cal. Yr.
ADAMS	Bryan	47	M	Dr Miranda Lawson	19/04/2012			721 on 19/04/2012		
BROWN	Ella	29	F	Dr Miranda Lawson		19/04/2012		723 on 19/04/2012		
CHRISTIAN	Greg	82	M	Dr Miranda Lawson			19/04/2012	732 on 19/04/2012	Eligible by age	
CITIZEN	Jane	61	F		19/04/2012			721 on 19/04/2012		
KREW	Miriam	67	F				19/04/2012	732 on 19/04/2012		
EMERALD	Barry	28	M							
FRANKLIN	Amanda	36	F							
GRISSHOLM	Gerald	61	M							

Add
Delete

The date provided for each tracked item number refers to the last time this item number was billed to that patient. The Item Register is particularly useful for allowing you to quickly see when a particular patient was last billed that item number. Right-clicking in the Provider column will give you the option to change the Usual Provider for this patient.

Overdue INRs

This function is available if your practice type (**File > Set Practice Type**) is set to General Practice or Obs/Gynae/IVF Specialist.

Displays a list of patients that are overdue for their INR. This is determined by the date that is entered in the *Next Test* date field in the INR Control window in the Clinical Window (**Tools > INR Control**).

Pending Births

This function is available if your practice type (**File > Set Practice Type**) is set to General Practice or Obs/Gynae/IVF Specialist. See The Pending Births List in the Obstetrics History section for more information.

Overdue Smears

This function is available if your practice type (**File > Set Practice Type**) is set to General Practice or Obs/Gynae/IVF Specialist.

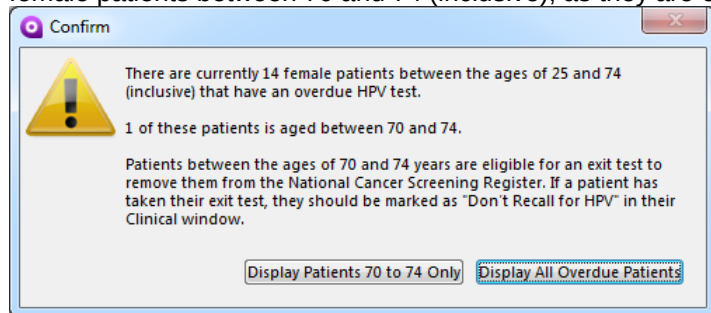
Displays all female patients aged between 20 and 70 (exclusive), who have not been marked as Inactive, and who have not been marked as *Don't Recall for smears* in the Clinical Window, and who have not had a recorded pap smear in the past 2 years. For Pap Smears that need to be recalled more frequently than every two years, use the [Recall](#) system.

Note: This function is available if you are either downloading pap smear results electronically, or manually entering the dates of pap smears in the Clinical Window.

Overdue HPV Testing

This function is available if your practice type (**File > Set Practice Type**) is set to General Practice or Obs/Gynae/IVF Specialist.

Selecting this option will produce a prompt asking you to select which patients you would like to display. Genie will either display all female patients between 25 and 74 (inclusive) who are overdue for HPV testing; or all female patients between 70 and 74 (inclusive), as they are eligible for their exit test.

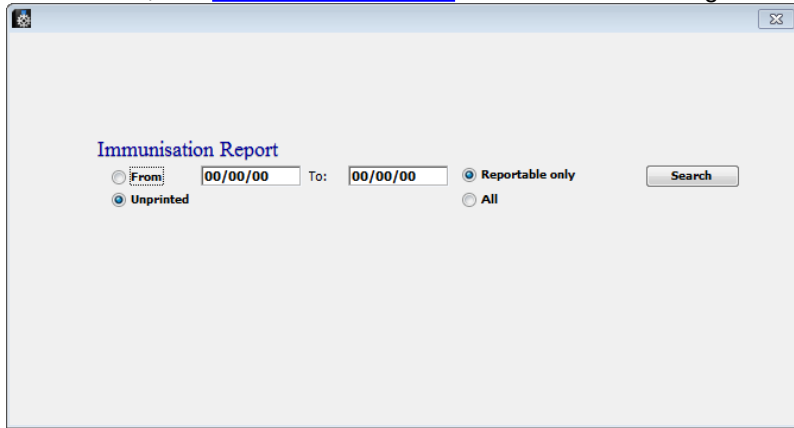


Ticking the *Don't Recall for HPV* checkbox in a patient's Clinical window will cause Genie to omit that patient from both displays.

Immunisation Module

This function is available if your practice type (**File > Set Practice Type**) is set to General Practice.

This opens the Immunisation window allows you to produce a manual ACIR report. For further information on ACIR online, see [ACIR Immunisations](#) in the Practice Management section.



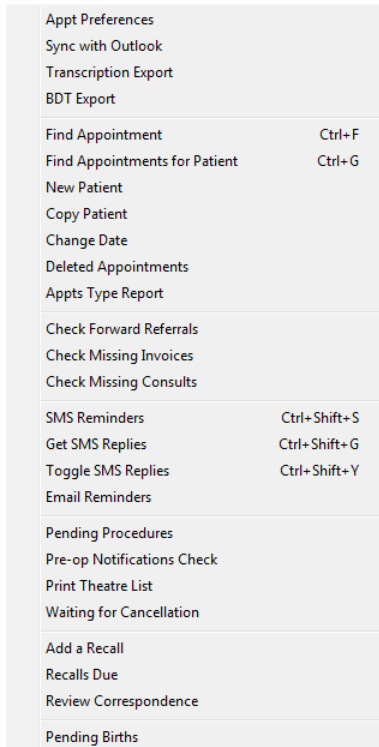
Orthopaedic Score Analysis

This function is available if your practice type (**File > Set Practice Type**) is set to Orthopaedic Surgery.

Allows you to search for patients in a period of time who have a specific Score Type.

3.6 The Appts Menu

The Appts menu is only available when the Appointment Book is open.



Appointment Preferences

Allows you to set your preferences for the Appointment Book. See [Appointment Preferences](#).

Sync with Outlook and iCal

Genie's Appointment Book, Tasks List and Address Book can be synchronised with Apple's iCal and Address

Book applications, or with Outlook on a Windows computer. As these applications can be either published to the web, or subsequently synced to a PDA, it is possible for you to access your appointments and To Do lists from anywhere; synchronisation can occur in both directions. That is, an appointment created or modified in iCal or Outlook is subsequently created or modified in Genie. For more information please refer to the [Synchronising with iCal/Outlook](#) section in the Clinical module.

Transcription Export and BDT Export

Opens the window which allows you to export documents to be typed by Global Transcription Services, NTS Transcription, Ozescribe, Syberscribe, Pacific Solutions, Medical TranscriptionPlus, AnsellMT, Professional Transcription Solutions or BDT. For more information on these services, please refer to [Transcription Services](#) section.

Find Appointment (Ctrl+F)

Allows you to search for a specific patient, and locate all of their past and future appointments.



Search Appointments...

Surname

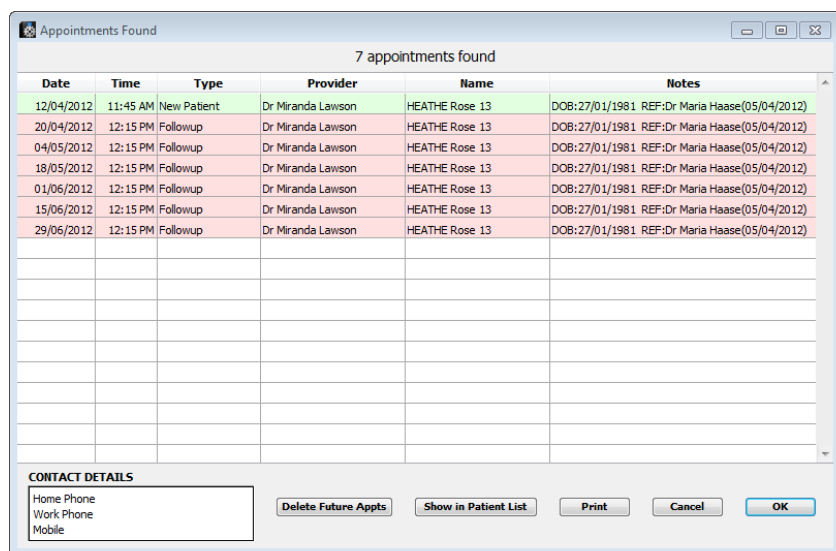
First Name

Notes

Chart or NHS

DOB

@ can be used as a wildcard character. (Shift-2)



Appointments Found

7 appointments found

Date	Time	Type	Provider	Name	Notes
12/04/2012	11:45 AM	New Patient	Dr Miranda Lawton	HEATHE Rose 13	DOB:27/01/1981 REF:Dr Maria Haase(05/04/2012)
20/04/2012	12:15 PM	Followup	Dr Miranda Lawton	HEATHE Rose 13	DOB:27/01/1981 REF:Dr Maria Haase(05/04/2012)
04/05/2012	12:15 PM	Followup	Dr Miranda Lawton	HEATHE Rose 13	DOB:27/01/1981 REF:Dr Maria Haase(05/04/2012)
18/05/2012	12:15 PM	Followup	Dr Miranda Lawton	HEATHE Rose 13	DOB:27/01/1981 REF:Dr Maria Haase(05/04/2012)
01/06/2012	12:15 PM	Followup	Dr Miranda Lawton	HEATHE Rose 13	DOB:27/01/1981 REF:Dr Maria Haase(05/04/2012)
15/06/2012	12:15 PM	Followup	Dr Miranda Lawton	HEATHE Rose 13	DOB:27/01/1981 REF:Dr Maria Haase(05/04/2012)
29/06/2012	12:15 PM	Followup	Dr Miranda Lawton	HEATHE Rose 13	DOB:27/01/1981 REF:Dr Maria Haase(05/04/2012)

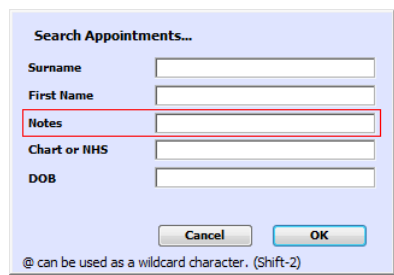
CONTACT DETAILS

Home Phone

Work Phone

Mobile

This is a useful feature if you would like to find out if a particular patient has an upcoming appointment to see a doctor, as well as allowing you to see when they last had an appointment. If the patient is a new patient that has yet to be entered into the database, ie. has a non-patient appointment in brown text, then you can still search this by entering the name in the *Notes* field of the search box.



Search Appointments...

Surname

First Name

Notes

Chart or NHS

DOB

@ can be used as a wildcard character. (Shift-2)

Find Appointments for Patient (Ctrl+G)

Locates all appointments for the selected patient in the Appointment Book.

New Patient

Opens a new Patient Demographics window.

Copy Patient

Copies the surname, address and account holder details of the highlighted patient into a new Patient Demographics window. This is used to create new records for multiple members of the same family as it saves you from having to re-enter demographic information (providing that they all share the same address, etc).

Change Date

Allows you to change the date of the highlighted patient's appointment. For more information, please refer to [Moving/Copying Appointments](#).

Deleted Appointments

Allows you to view deleted appointments from the past 7 days and restore any appointments that may have been inadvertently deleted. For more information, please refer to [Deleting/Undeleting Appointments](#).

Appts Type Report

Produces a printed report by Appointment Type for any given day or period of time.

The report produces a numerical count of each appointment type where the appointment cell contains either a patient or non-patient appointment. This can also be accessed by going into **File > Maintenance & Reports**, and clicking on the **Other Reports** tab, then **Alt+clicking** on **Appointments Report**.

Check Forward Referrals

This allows you to check that future appointments in a specified time frame have valid referrals.

Check Missing Invoices

This will check that all appointments for the specified date range (unless marked as DNA or Cancelled) have an invoice in their Account History with the corresponding date of service.

Check Missing Consults

This will check that all appointments for the day have either a) a consultation record with notes entered into the *History* field or b) an antenatal visit recorded in their current pregnancy record.

SMS Reminders (Ctrl+Shift+S)

Allows you to send an SMS reminder to patients regarding their appointment times. Please refer to [Appointment Reminders](#) for the setup and use of this function.

Get SMS Replies (Ctrl+Shift+G)

Prompts Genie to search for any replies to previously sent SMS reminders. Any replies will then appear in the *Confirmed* column of the doctor's individual tab in the Appointment Book.

Toggle SMS Replies (Ctrl+Shift+Y)

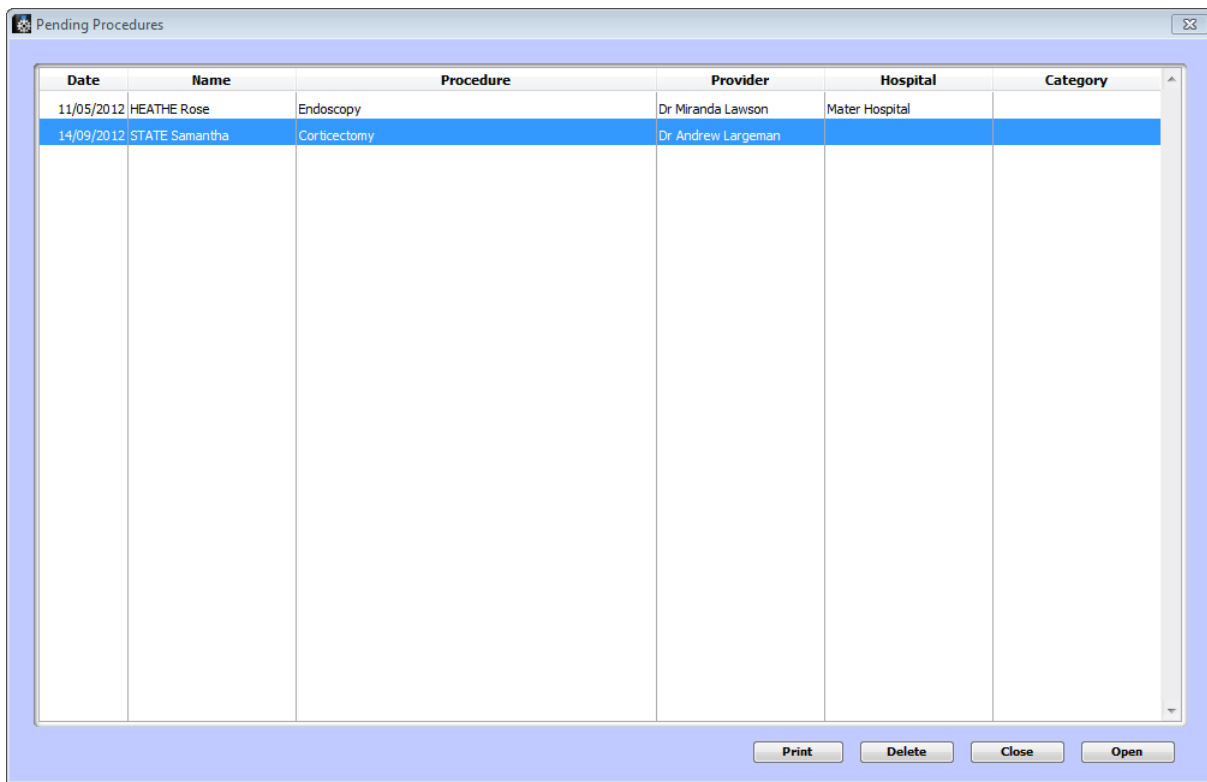
Can be used in the 'All' view of the Appointment Book to toggle between the patient's name and their SMS reply.

Email Reminders

Allows you to send an email reminder to patients regarding their appointment times. Please refer to [Appointment Reminders](#) for the setup and use of this function.

Pending Procedures

Displays a list of all patients with Procedures that have not yet been linked to an appointment time.



The screenshot shows a software window titled "Pending Procedures". Inside the window is a table with six columns: Date, Name, Procedure, Provider, Hospital, and Category. The table contains two rows of data. The first row shows a procedure on 11/05/2012 for HEATHE Rose, performed by Dr Miranda Lawson at Mater Hospital. The second row shows a procedure on 14/09/2012 for STATE Samantha, performed by Dr Andrew Largeman at Mater Hospital. The second row is highlighted in blue. At the bottom of the window, there are four buttons: Print, Delete, Close, and Open.

Date	Name	Procedure	Provider	Hospital	Category
11/05/2012	HEATHE Rose	Endoscopy	Dr Miranda Lawson	Mater Hospital	
14/09/2012	STATE Samantha	Corticectomy	Dr Andrew Largeman	Mater Hospital	

From this window you can open the original procedure and make any necessary changes. For more information, please refer to the [Procedure](#) chapter.

Pre-op Notifications Check

Displays a list of patients who have upcoming procedures scheduled and provides a summary of items that need to be checked for each procedure. For more information, please refer to the [Procedure](#) chapter.

Print Theatre List

Prints a list of patients booked in for procedures with a specific hospital and provider. For more information please refer to [Printing Theatre Lists](#).

Waiting for Cancellation

Displays a list of patients with their status marked as *Waiting for Cancellation*. For more information, please refer to [Cancellation List](#).

Add a Recall

Allows you to add a recall for the patient selected. For more information, refer to the [Recalls](#) chapter.

Recalls Due

Provides a list of patients with recalls overdue or due within 30 days. For more information, refer to the [Recalls](#) chapter.

Review Correspondence

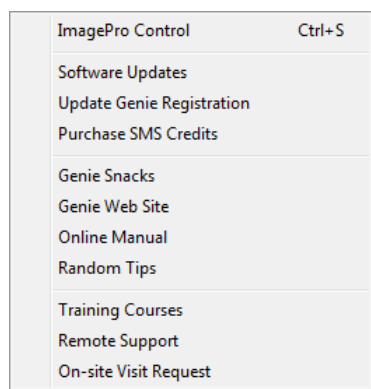
Opens up the Patient Correspondence window. This can also be accessed via the Appointment Book, using the

Patient Correspondence icon . For more information on reviewing correspondence, please refer to [Reviewing Correspondence](#).

Pending Births

This function is available if your practice type (**File > Set Practice Type**) is set to General Practice or Obs/Gynae/IVF Specialist. See The Pending Births List in the Obstetrics History section for more information.

3.7 The Special Menu

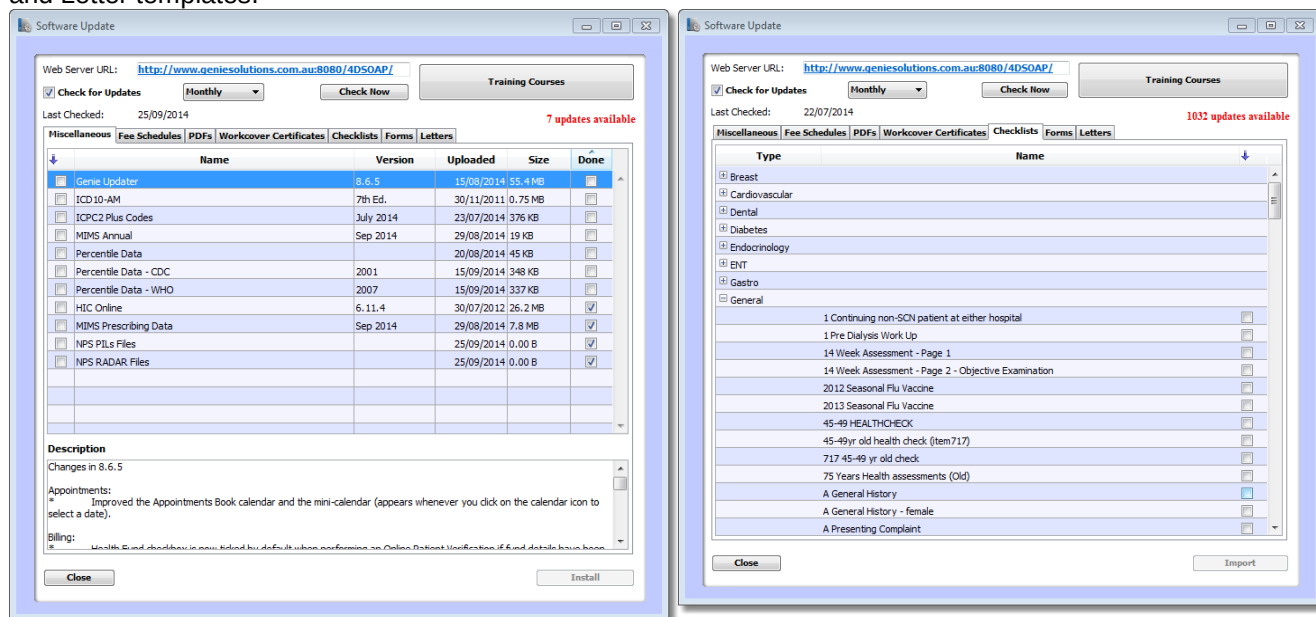
**ImagePro Control (Ctrl+S)**

Opens the ImagePro Control window. For more information, please refer to the [ImagePro](#) chapter.

Software Updates

Connects you to the Genie Web Server to check what updates are available relevant to your state, operating system and Genie version. When you first open the Software Updates window, a message will appear stating that it is checking for updates. It may take some time for the updates list to load as your computer is communicating with our web server. Once the list has loaded, if an update that you require is not listed it means it is not yet available for your state, operating system or Genie version.

From this window, you can also download Genie QuickGuide PDFs, Workcover Certificates, Checklists, Forms, and Letter templates.



Clicking on the Training Courses button in the top right corner will take you to a national list of training course dates. Click on your state to view the available courses and enrol online.

[*Online Training](#)
[\(click to view courses\)](#)

[Adelaide](#)
[\(click to view courses\)](#)

[Brisbane](#)
[\(click to view courses\)](#)

Course Name		Date	Time	Duration	Unit Price	Available
NEW USER: Appointment Book and Basic Billing	More Info Enrol Now	Wed 19th Mar 2014	9:30 am	6 hrs	\$480.00	5 Seats
Billing, Quotes, HIC Online & ECLIPSE	More Info Register Interest	Wed 9th Apr 2014	9:30 am	6 hrs	\$480.00	FULL
Prac Mgmt 1: Setup, Updates & the Paperless Office	More Info Enrol Now	Wed 14th May 2014	9:30 am	6 hrs	\$480.00	5 Seats
Prac Mgt 2: Mainten'ce & Reports & the Yr in Genie	More Info Enrol Now	Wed 18th Jun 2014	9:30 am	6 hrs	\$480.00	9 Seats
Searches and Quick Reports	More Info Enrol Now	Wed 16th Jul 2014	9:30 am	6 hrs	\$480.00	10 Seats
Billing, Quotes, HIC Online & ECLIPSE	More Info Enrol Now	Wed 13th Aug 2014	9:30 am	6 hrs	\$480.00	8 Seats

[Melbourne](#)
[\(click to view courses\)](#)

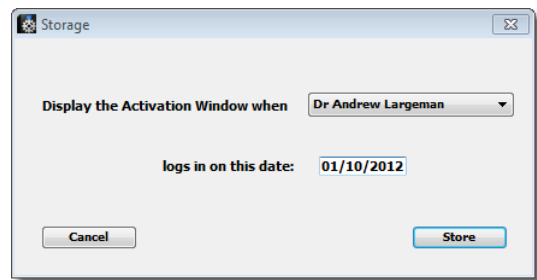
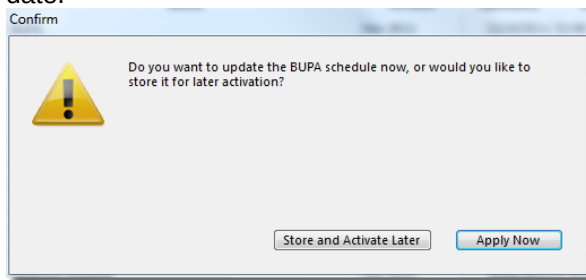
Ticking the *Check for Updates* tickbox checks for software updates either daily, weekly or monthly. If there are new updates available, the Software Updates button will appear in the navigation palette for the administrator of Genie when they log on. The **Check Now** button checks for updates immediately.

To download and apply an update, fee schedule, PDF or a Workcover certificate, click on the relevant tab (**Miscellaneous**, **Fee Schedule**, **PDFs** or **Workcover Certificates**), tick the checkbox to the left of the item you require, then click on the **Install x Item/s** button. If you already have an update or do not require it, you can tick the *Done* tickbox on the right which will move it to the bottom of the list until the next version is uploaded by Genie.

A window will appear asking if you would like to **Store and Activate Later** or **Apply Now**.

Note: Generally updates should be performed at a time when no one else is using Genie to ensure the data is imported without interruption. Do not cancel or stop an update in the middle of the update process as this can cause data corruption. Even though it looks like it might have frozen, it is just taking time to download and import the information.

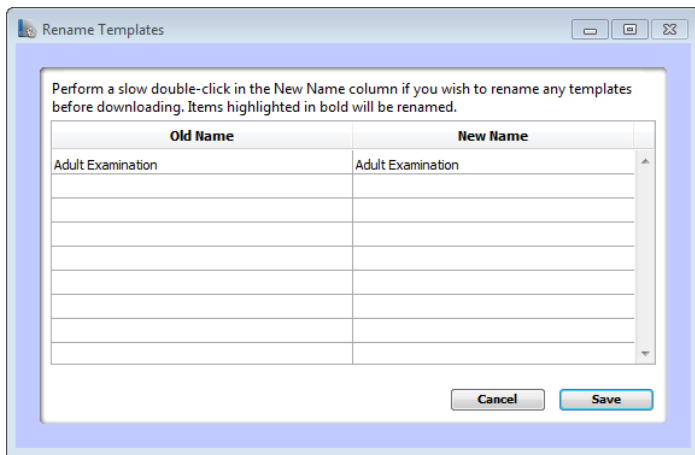
If you click the **Store and Activate Later** button, another window will appear asking you to select a user and a date.



These stored updates can be accessed by going to **File > Maintenance & Reports**, clicking on the **Monthly** tab and clicking on the **Stored Updates** icon.

Note: Fee schedules can be updated when others are using Genie but users should not perform any billing for the duration of the update.

To import checklists, forms or letter templates, click the small plus **+** icon to the left of the relevant category, tick the checkbox to the right of the relevant item that you require and click the **Import X Item/s** button. A window will appear allowing you to rename the template before you download it.

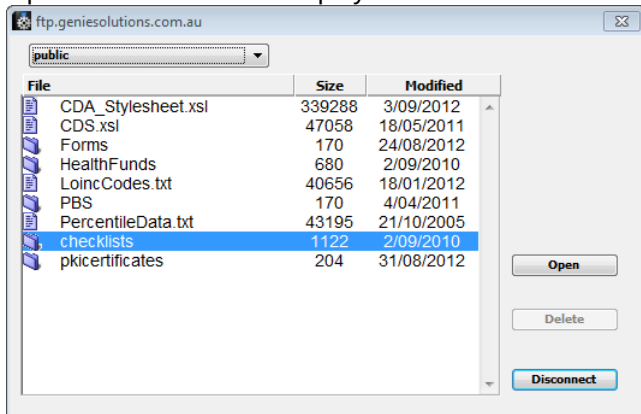


Slow double-click in the *New Name* column, change the name, then click **Save**. For more specific information, please refer to the [Checklist](#), Forms or [Referral/Reply Letter](#) sections.

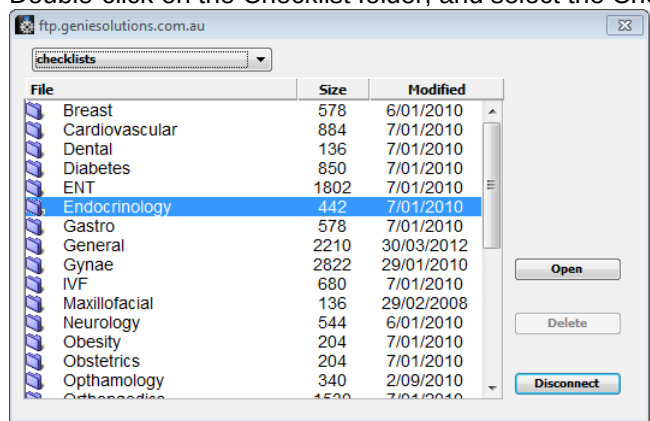
Get Checklists

Note: If you are using Genie version 8.6.5 or higher, you will not have a Get Checklists option in the Special Menu. Please see the [Software Updates](#) section above to view how to download checklists.

Opens a window which displays a list of checklists available for download.



Double-click on the Checklist folder, and select the Checklist you wish to download.



This then makes the Checklist available for use in a patient's Clinical Window. For more information, please refer to the [Checklists](#) section.

Update Genie Registration

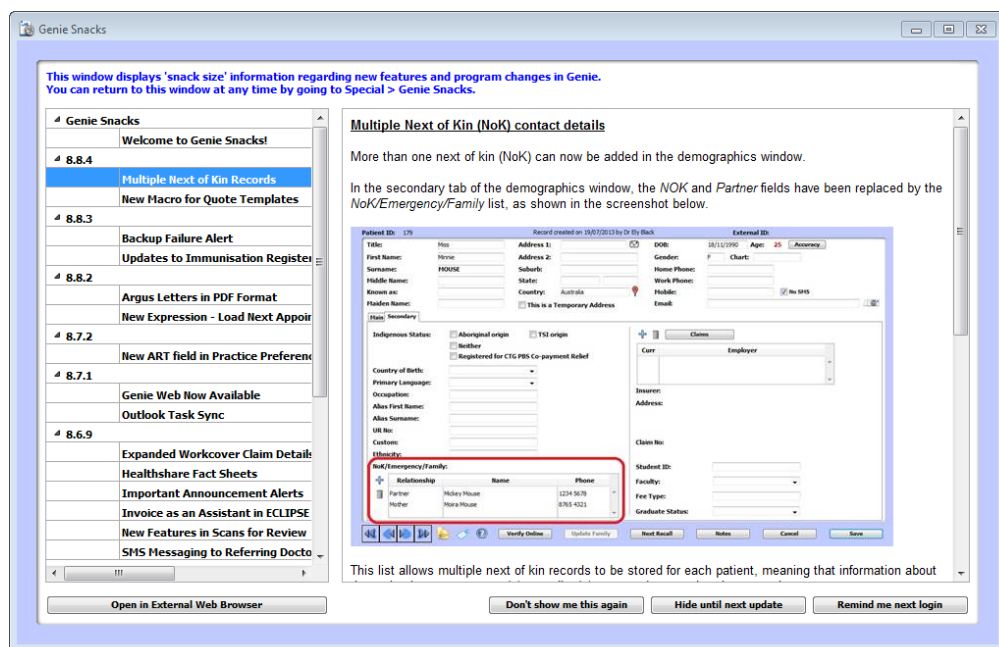
Allows for online registration of the Genie Software. When your registration is due, select this option and you will be presented with a Registration window. Click on the **Register** button and your registration will be renewed (this is provided your registration fees have been paid).

Purchase SMS Credits

Takes you to the Genie Online Shop to purchase SMS credits for SMS Appointment Reminders. These will be allocated for use straight away.

Genie Snacks

This feature is available for users on version 8.6.5 or higher. It opens the Genie Snacks window so that you can review information regarding new features and program changes in subsequent versions of Genie. The first time you open Genie after updating, this window will appear:



If you do not have time to view the changes, click the **Remind Me Later** option, which will open this window the next time you log into Genie. Alternatively, you can disable this prompt by clicking the **Do Not Show** option. The **Hide Until Next Update** button is selected by default and will hide the Genie Snack window until a new update is applied or it is accessed via **Special > Genie Snacks**.

Clicking on a row below the version number will display information about the change or added feature. Clicking on the **Open in External Browser** button will open the highlighted change in your default web browser.

Genie Web Site

Takes you directly to the Genie website.

Note: If this menu item, or the Online Manual menu item below does not do anything when selected, this probably means that your default web browser has issues with Genie. To rectify this, you will need to change your default web browser.

Online Manual

Opens the online version of the Genie Manual.

Random Tip

Displays random tips to let you learn something new about Genie.

Training Courses

Takes you to our online booking system for the small group training sessions available across Australia.

Remote Support

For use under instruction from Genie Solutions Support.

Onsite Visit Request

Takes you to our online booking system for customised onsite training with a Genie trainer.

Part

IV

Setting Up Genie

4 Setting Up Genie

The following sections outline the steps required to set up Genie.

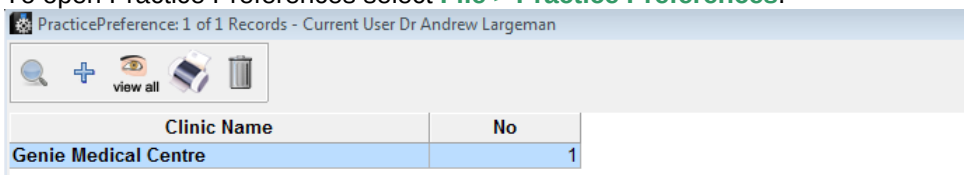
4.1 Practice Preferences

The Practice Preferences record stores details about the practice and allows you to set a variety of options which will affect all users on the network.

You can have more than one Practice Preference record. If so, you will be asked to select a practice when you log into Genie. This intended to be used when separate businesses operate under a separate ABNs eg. if you sell cosmetic products under a different business name to your practice and require a different letterhead and ABN to printed on invoices.

Note: In a multi-doctor practice where each doctor would like their own letterhead or ABN, there is no need to create a different practice for each doctor. In this case, you can enter individual ABNs use a different letterhead in each doctor's User Preferences, and select the Use Individual Doctor's Letterheads checkbox. This is discussed later in this section.

To open Practice Preferences select **File > Practice Preferences**.



This will open a listing of Practice Preferences records. In most cases there will only be one record. Double-click on the record to open the the Practice Preferences window.

4.1.1 The Practice Details Tab

In this section you can enter your practice details such as address, phone and fax numbers and ABN.

Edit Practice Preferences

Practice Details | Miscellaneous | Practice Letterhead | Images & Attachments | Clinical | Carrier Identifiers

Clinic Name: The Genie Medical Centre
 Address 1: Suite 4, Level 1, 1 Swann Road
 Address 2:
 Suburb/State/Code: TARINGA QLD 4068
 Country: Australia
 Phone: 0738704085
 Phone 2:
 Fax: 0738704462
 Email: support@geniesolutions.com.au
 Website: www.geniesolutions.com.au
 VSP Number:
 ACN No:
 ABN No: 12345678912
 Use ABN No for...: ☒ Practice ABN ☐ Doctor's ABN
 HPI-O:
 NATA:
 WHO v5: ☐
 SCP ID:
 Medicare Acct ID: 1 DVA Acct ID: 2

My server is hosted in a time zone: 0 hrs ahead
 Set to zero unless your server is hosted in a different time zone.

☐ No Default Site of Service on Invoices
☒ Allow Invoices to be Deleted
☒ Print Medicare Claim Forms
☒ For all accounts ☐ Only for unpaid accounts
☐ Print Overseas Student Claim Forms
 If field 'Fee Type' is equal to: 05
 OSHC Provider Code: 05
☐ Make Default Practice
 GST Rate: 10 %
 Financial Year starting: Jul 01
☐ Inactive

Purged from: 00/00/0000 Last Purged: 00/00/0000

Cancel Save

VSP Number

Vaccination Service Provider number.

ACN Number

If you are a registered Company then enter your ACN here.

ABN Number

If you practice as a solo practitioner or a partnership, you should select the **Practice ABN** radio button. If your practice is an associateship, you should select the **Doctor's ABN** radio button. Genie will then use the ABN number in each doctor's User Preferences on invoices.

NATA & IVF ID

Used in IVF clinics. Practice Type set to Obs/Gynae/IVF.

SCP ID

Required for practices who perform pathology services for which there is an associated MBS item number. Leave this blank if not relevant.

HPI-O

Healthcare Provider Identifier – Organisation. Required for eHealth purposes.

Medicare Acct ID

Displays the account ID for Medicare.

DVA Acct ID

Displays the account ID for DVA.

My server is hosted in a time zone x hrs ahead

This is used if your server is hosted in a different time zone. It will adjust the appointment book and service times appropriately.

No Default Site of Service on Invoices

Forces the users to select a site of service when invoicing, to avoid billing to the wrong provider number for a provider that has multiple sites of service.

Allow Invoices To Be Deleted

Only the Administrator can tick this option. If this is not ticked, the **Delete** button will not work in the Account History window.

Print Medicare Claim Forms

If you select this option, Genie will ask if you would like to print a claim form for the patient whenever you invoice a patient privately. These are the claim forms that the patient would usually fill in at their local Medicare office, NOT DB4 claim forms for bulk-billed patients. To get a supply of these forms (A4/landscape), please contact your Medicare office. You would normally select the **Only for Unpaid Accounts** radio button. If the patient has fully paid the account, they do not need a claim form.

Please ensure that you are using the current version of Medicare Claim Form. The version on the bottom right hand side of the form is shown as: PC-1.06.08.10.

Make Default Practice

Allows you to select which of the practices in this list is the default practice. This option will only appear for practices that are not marked as the default.

Print Overseas Student Claim Forms

This option is for University Medical Centres. It prints the appropriate claim form for an invoice for overseas students. The fields below this option allow you to specify the Fee Type and Worldcare Provider Code that prompt Genie to print these forms.

GST Rate

Enter the GST rate to apply to items selected as GST applicable.

Financial Year Starting

All financial reports created on a 'This financial year' or 'Last financial year' basis will be calculated using the timeframe entered here.

Inactive

Allows you to mark a practice that you no longer use as inactive so that you can keep the practice details in your database. This option will only be selectable to practices that are not marked as the default practice.

Purged from

Set by the user when performing a Cull Invoices, to have invoices created prior to this date culled.

Last Purged

This date shows when the last Cull Invoices was performed through **File > Maintenance & Reports, Monthly** tab.

4.1.2 The Miscellaneous Tab

Coding System

Genie can incorporate both the ICPC 2 plus and ICD10 AM disease and procedure coding systems. This is where you specify which coding system you are using, if any.

Auto-Generate Chart Numbers for New Patients

Selecting this option instructs Genie to automatically generate a chart number for new patient records. The numbers generated tick over by one for each new patient, starting at the last entered number.

Warning: If a chart number is changed manually with this option ticked, Genie will auto generate from the number manually entered, potentially doubling up your chart numbers.

Make the Chart Number the Same as the Patient ID

This will make the chart number the same as the Patient ID automatically generated in Genie to make some searches in Genie easier.

Auto-create Folders for New Patients

Used if you do not want to use the attachment/imaging function in Genie and would prefer to put images directly into the patients' Images folder on the server.

Make Surnames Upper Case

Tick this if you wish to automatically capitalise the surnames of patients in the Patient Demographics window and of doctors in the Address Book.

HIC Location ID

This is the ID that Medicare Australia uses to identify you when using HIC Online. It is also your Genie customer reference number that you will be asked to provide when using Genie Solutions Support. It is displayed in blue text the top right hand corner of your appointment book.

Use Bulk Bill - tick if you would like to use online bulk bill claiming.

Use Patient Claims - tick if you would like to use online patient claiming. *Run Real Time By Default* - this will create an online session at the time of receipting a patient claim. See [Patient Claims](#).

Use DVA - tick if you would like to use online DVA claiming.

Use Online Verification - tick if you would like to verify patients details online with HIC.

Auth Proxy User ID & Password - used if you login to a proxy server before accessing the internet. For information on how to set up the proxy server for HIC online transmissions, see HIC Online Installation - Set Up for a Proxy Server (Online Manual).

Default Receipt Type

When receipting direct from an invoice this will allocate the payment amount to the type selected, e.g. if the majority of your payments are made by EFTPOS then you would select this as your default receipt type.

Auto-Clean Data when Saving

This performs the same function as the Cleanup Database in Maintenance & Reports except that it happens transparently at the moment each record is saved. The performance impact should be negligible but it can be turned off just in case it does impact very busy practices.

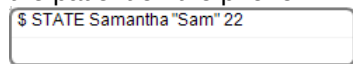
Note: As this should reduce the incidence of index and database corruption, it is highly recommended that you select this option.

Import changes to appts modified offsite

This allows/disallows the importation of changes made offsite to existing appointments. An example of this would be the doctor going offsite to a nursing home, and making additional appointments in offsite logging mode while (s)he is there. This is allowed by default. If you don't want appointment modifications made offsite to be changed in the main data file, you should untick this option. For more information on offsite logging, please see the [Offsite Logging](#) chapter in this manual.

Give me a warning if account...

In this section you can specify an overdue amount or an overdue number of days, after which Genie gives you a warning when an appointment is made. The warning consists of a dollar sign inserted in front of the patient's name in the Appointment Book. This gives you an opportunity to address the overdue account while you have the patient on the phone.

**Default Patient Type**

This is the Account Type that you would like to be automatically applied to new patient records e.g. if you mostly private bill, select private or AMA. If you mostly bulk-bill, select Bulk Bill. You can always change the patient's *Account Type* drop-down when completing their new record.

Print Remittance Advice

This checkbox allows you to toggle whether the remittance advice panel appears at the bottom of printed invoices. The six checkboxes below this dictate which payment methods appear on the remittance advice:

- Selecting *Accept BPAY* will print the *BPAY Biller Code* specified for the doctor's default bank account (for more information, see the [Bank Accounts](#) section of this manual), as well as the *BPAY CRN* specified in the account holder's record ([Open > Account Holders](#)).
- Selecting *Accept Direct Deposit* will print the *Account Name*, *BSB*, and *Account Number* specified for the doctor's default bank account.
- The other options print as checkboxes in the remittance advice section for the patient to complete themselves.

Require a Referrer Provider Number on Invoices

Ticking this prevents you from creating an invoice where the referring doctor has no provider number entered in their Address Book entry. If ticked, the user will be prompted to enter a valid provider number when invoicing patients with this referring doctor.

Note: This check will always be performed for Online Claiming.

Print Invoice Full Descriptions

Ticking this will print item descriptions in full on invoices/statements. Having this unticked will only print the first line of the description. Descriptions for items can be edited through **Open > Billing Items** by double-clicking on the item.

Print Doctor and Patient DB4 forms on same page

Tick this if you wish to have your Medicare DB4 forms for both the doctor and patient print on the same A4 page, rather than two separate A4 pages.

Print Total Balance on Invoices

Tick this if you wish for the account holder's total outstanding amount to print on invoices.

Credit Terms

If you enter a number in here, Genie will print 'Payment due by <date>', at the bottom of unpaid invoices, where <date> is the date of the invoice plus the number of days set here. If you do not want this to appear, set this field to 0 (zero).

Patient Label

This allows you to specify which label you would like printed on invoices e.g. allied health professionals may prefer 'Client'.

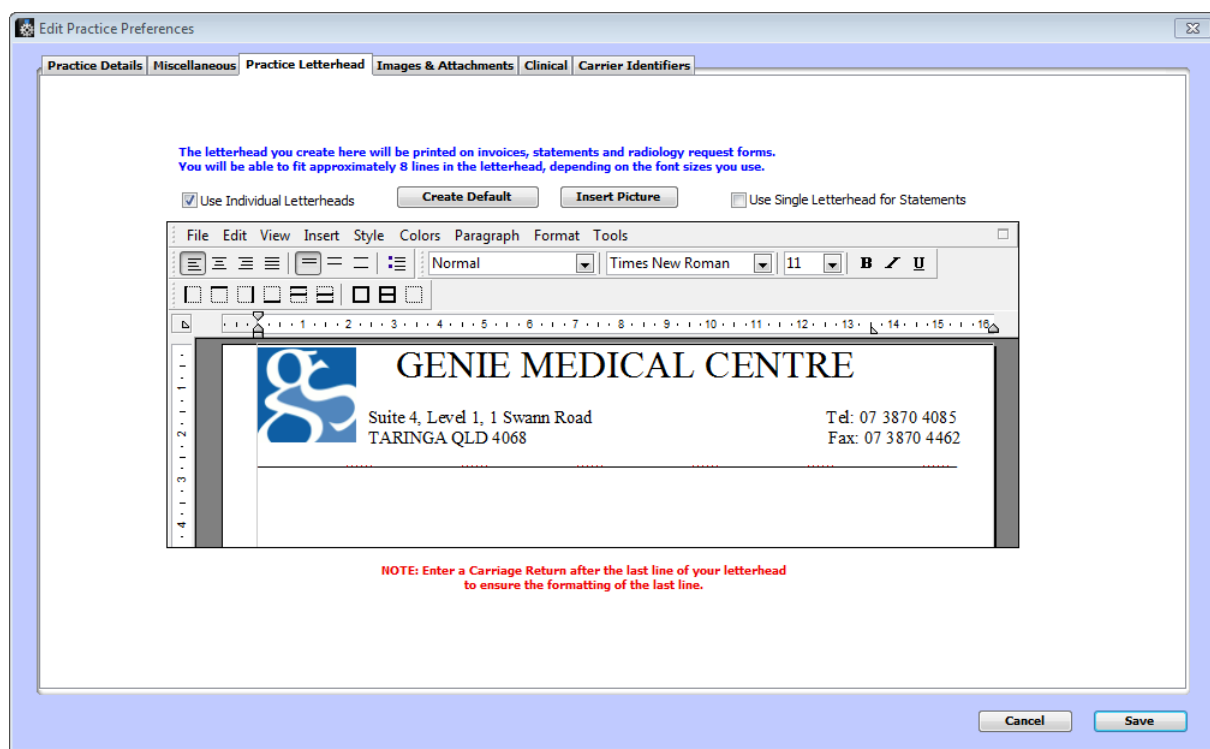
Invoice Memos

Allows you to edit and add Invoice Memos without having to print an actual invoice. For more information see [Invoice Memos](#) in the Invoicing section of the Reception Module.

Give a warning if referral expires within x weeks

When invoicing a patient a warning will be generated if the patient's referral expires within the number of weeks specified. A warning is also given if all valid referral start dates are later than the current date. This preference will not apply if your practice type is set to General Practice or Other Allied Health.

4.1.3 The Practice Letterhead Tab



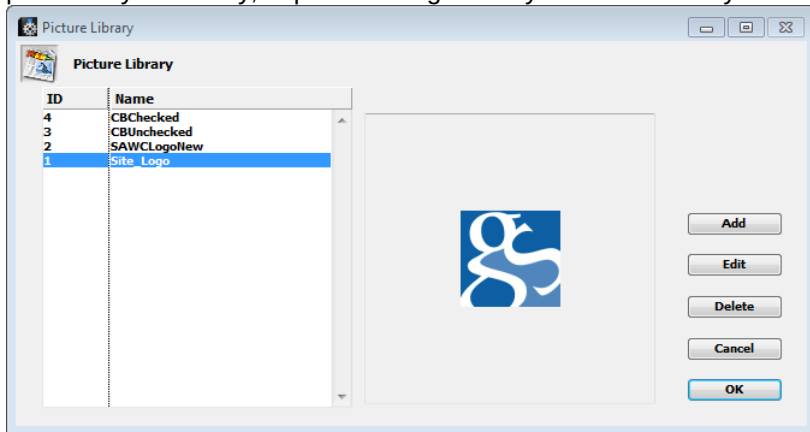
This window allows you to set up a letterhead which will be printed on invoices and can be added to letter templates when you select 'Your Letterhead' from the **Expressions** tab.

If each doctor in the practice would like to have a different letterhead, select the *Use Individual Letterheads* checkbox, and set up the letterheads in their [User Preferences](#). When printing overdue statements from Unpaid Invoices in Maintenance & Reports, if you would prefer just this letterhead to print, rather than separate statements printing for the separate practices billed, then tick *Use Single Letterhead for Statements*.

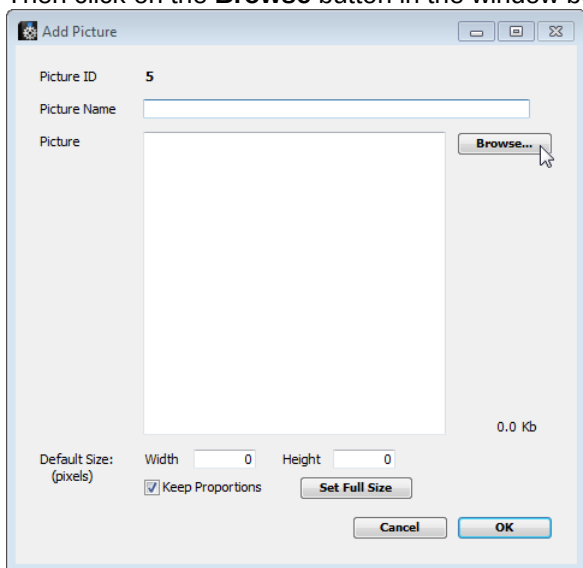
Note: Genie can fit approximately 8 lines onto an invoice letterhead, depending on font size. If you find your letterhead is being truncated on invoices, you will have to either reduce the font size or cut back on the number of lines.

You can click on the **Create Default** button to create a default letterhead which you can then edit.

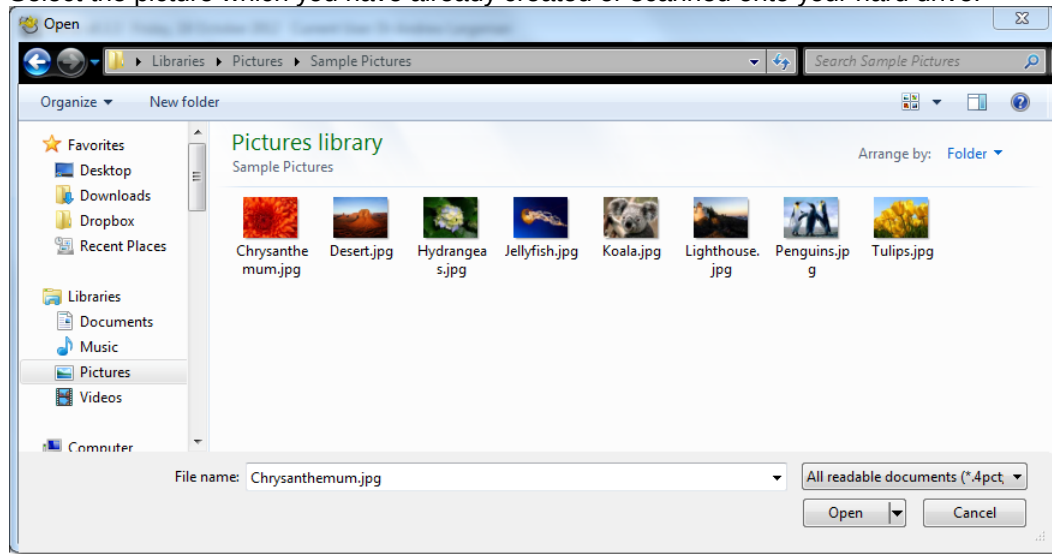
The **Insert Picture** button allows you to insert a picture from your picture library. If you do not already have a picture in your library, import an image from your hard drive by clicking the **Add** button in the window below.



Then click on the **Browse** button in the window below.



Select the picture which you have already created or scanned onto your hard drive.

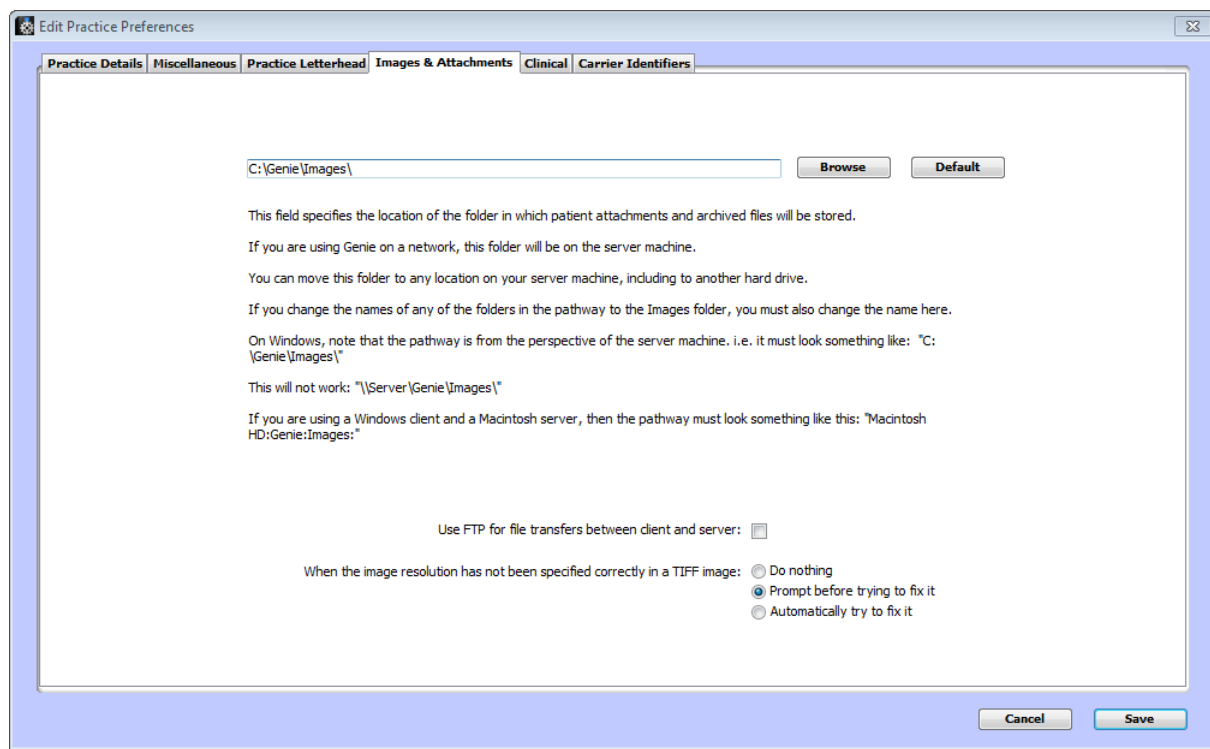


Deleting a Corrupted Letterhead

Sometimes the letterhead can become corrupted. The symptoms of this are that Genie is unable to print invoices and x-ray requests. We rarely encounter this problem, and it usually only occurs on Macintosh computers. However, if this does occur, the letterhead can be cleared by holding down **Alt** whilst selecting **File > Practice Preferences**. You can then open the record and rebuild the letterhead.

If you are using individual doctor's letterheads i.e. the Letterhead from each doctor's User Preferences, clear these letterheads by holding down **Alt** whilst selecting **File > User Preferences**.

4.1.4 The Images and Attachments Tab



This window stores the pathway on the server to the Images folder, which by default is stored within the Genie folder. An explanation of this is already in this window, however there are a couple of very important points to note:

1. This is the pathway on the server, not the client machine.
2. Clicking on the **Default** button will insert the correct pathway if your Images folder is in the default Genie location.
3. The most common mistake here is to leave the directory delimiter off the end of the pathway i.e. “\” for a Windows server, and “:” for a Macintosh server. That is, the specified pathway should end with one of these characters.

When Genie starts up, it looks for the folder at the specified pathway. If it doesn't find it, you will receive a warning. It is expected that you will then fix it, otherwise your linked images may end up in unexpected places, and you will get errors and possibly crashes when adding or modifying patient records.

Note: If you have more than one Practice Preferences record, make sure this pathway is correct in ALL of them.

You can test whether the pathway is correct or not by simply deleting and re-typing the last character. If it is incorrect, you will get a warning that the pathway is invalid. If it's correct, nothing will happen.

Use FTP for file transfers between client and server: this tickbox is available for practices using version 8.2.7 or higher. By default, this will be deselected so practices can avoid depending on third-party FTP software.

Note: It is highly recommended that you leave this deselected unless you have a specific reason for using FTP.

When the image resolution has not been specified correctly in a TIFF image: TIFF images with invalid horizontal and vertical resolutions can be repaired by specifying what to do when Genie detects a bad image.

4.1.5 The Clinical Tab

The screenshot shows the 'Edit Practice Preferences' window with the 'Clinical' tab selected. The window has a title bar and a close button. The main content area contains several settings:

- ☐ Allow Pathology Import On Server
- ☒ Import Pathology Automatically on Client
- ☐ Set Printing by User Name
- Genie WebServer URL (for Updates and SMS)**
-
- My Health Record**
 - ☒ Activate for this Practice 
 - Certificate Used:

At the bottom right, there are 'Cancel' and 'Save' buttons.

Allow Pathology Import on Server

This should be ticked if your pathology is set to be downloaded onto the server computer.

Import Pathology Automatically on Client

This should be ticked if your pathology results are downloaded onto a client machine.

Set Printing by User Name

If your computer name could be different each time you log in, tick this so that your Printing Preferences will be associated with your user name rather than with your computer name. This option is typically used by those running via terminal services.

Genie WebServer URL (for Updates and SMS)

Stores the Genie WebServer URL.

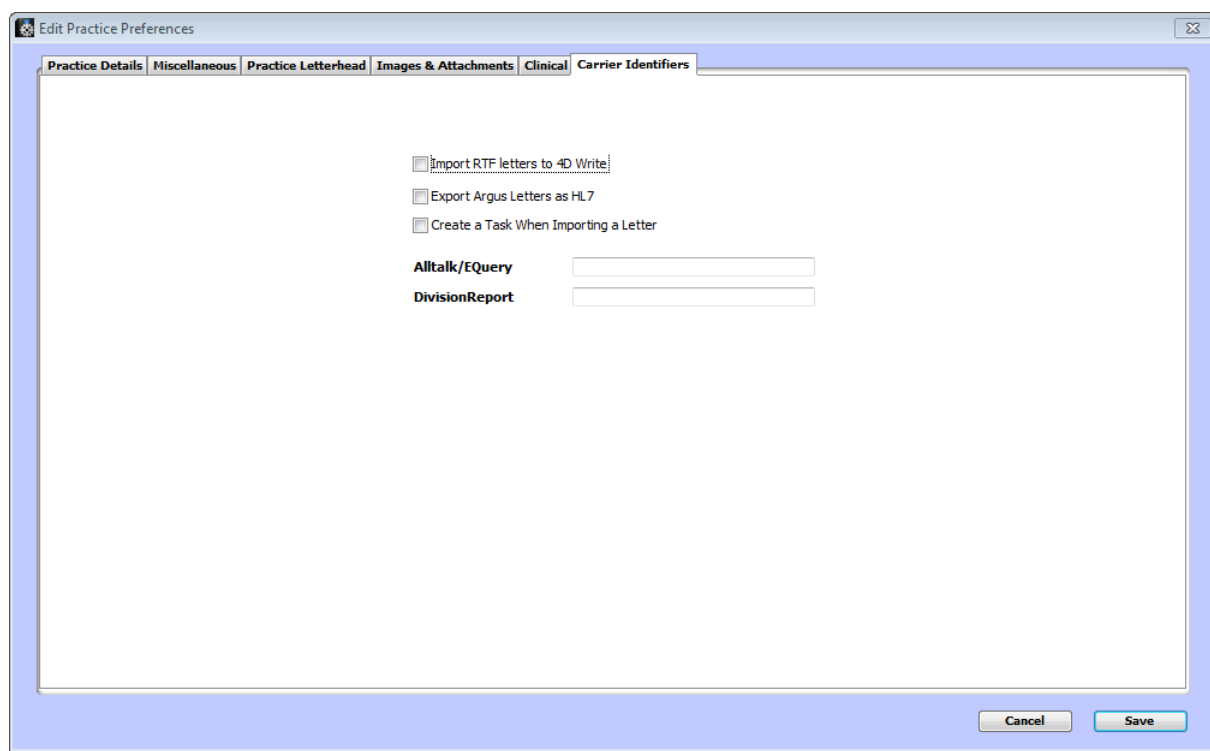
Select CDA Stylesheet

Allows you to specify a CDA Stylesheet by browsing your computer.

Activate for this Practice

This preference is used to activate My Health Record functionality for this practice. For more information on My Health Record, please see the My Health Record section.

4.1.6 Carrier Identifiers



If you are sending and receiving correspondence electronically using either EQuery, or DivisionReport, enter the Carrier Identifier assigned to you by this provider in the corresponding field on this screen. See [Electronic Correspondence \(Sending via 3rd Party\)](#) for further configuration information.

Import RTF letters to 4D write relates to Argus letters that are sent in RTF format rather than PIT or HL7, so need to be attached to the patient chart rather than imported into 4D Write letter writer. Ticking this MAY allow the conversion of the RTF files into 4D Write. They will come in via **Open > Incoming Letters**, but if they display as blank letters untick this option and revert to attaching them as an image in the patients chart.

Export Argus Letters as HL7 relates to the format that Argus letters are sent in. Currently letters are sent via Argus in PIT format. In order to send letters in HL7 format in the future, Argus need to make some changes to the program on a site by site basis. Once Argus have made this change to your Genie system, this tick box should be checked. Otherwise, it should be left unticked allowing letters to continue being sent in PIT format.

Note: As of Genie version 8.8.2, all Argus letters are sent in HL7 format, so this checkbox is not visible.

Create a Task When Importing a Letter will send a task notification when a new letter is imported in Genie. If Genie is able to identify the recipient of the letter, the task will be sent to that user. Where Genie can not establish the recipient, the task will be sent to the Administrator.

Alltalk/EQuery and *DivisonReport* allow you to enter your respective carrier identifiers.

4.2 User Preferences

Note: To add/delete a user, see [Add/Delete Users](#) in the Practice Management Module.

Each Genie user in your database has their own preferences record. This allows you to customise your practice's workflow according to users' responsibilities; for example, allowing different preferences for different doctors in a multi-doctor practice, or allowing receptionists to switch off some of the clinical preferences such as pap smear warnings. It also allows each doctor to have their own letterhead if they wish.

To open your own preferences record, select **File > User Preferences**.

To open another user's preferences, select **File > All User Preferences**, and double-click on their name.

4.2.1 The Details Tab

The screenshot shows the 'Preferences: Dr Miranda Lawson' window with the 'Details' tab selected. The window contains the following fields and options:

- Title:** Dr
- First Name:** Miranda
- Middle Name/Initial:**
- Surname*:** Lawson (marked as required)
- Qualifications:**
- Provider Number:** 1234567X
- Prescriber Number:** 123456
- Sign Off:** Kind regards, Dr Miranda Lawson
- Payee Provider No:** 1234567X (Note: This field tells the HIC who is to receive MedClaims cheques eg. if this user is a locum, put the principal's Provider Number here.)
- Personal ABN No:**
- Provider Type:** Specialist (dropdown), Surgeon (General) (dropdown)
- Default Bank Account:** SNC (dropdown), ☒ Check Referral validity in Appointments
- Medical Registration Number:**
- OSHC User ID:** OS1234
- HPI-I:**
- UUID:** 4e3ead03-5313-4d0a-a8e8-a0305ffa
- Preadmissions ID:**
- My Health Record:**
 - ☒ Activate for this User (with info icon)
 - ☒ Check automatically when opening a Patient's Clinical Record
 - ☒ Retrieve Medicare Overview when opening My Health Record Tab
 - ☐ Activate Debug Logging
 - ☐ Use SWVT Test Environment
- Use Medeweb Online Appointments:** ☐
- User ID:** 1
- Appointment Order:** 17

At the bottom right, there are navigation buttons (back, forward, etc.) and 'Cancel' and 'Save' buttons.

The **Details** tab contains fields for your own personal details such as name, qualifications, provider and prescriber numbers and personal ABN number if you are working in an Associateship.

Note: If you are a solo practitioner or in a partnership you should use the Practice ABN which is stored in the Practice Preferences record.

The *Sign Off* field allows you to enter your usual way of signing off in a letter. These fields can then be referenced in a referral or reply letter, so that no matter which doctor is typing the letter, their own name will appear at the bottom.

The *Provider Type* allows you to specify whether you are a GP, Specialist, Allied health, Receptionist, Medical Laboratory Technician or a Medical Technician. If you are a Specialist, you have the option of selecting your specialty. This will be important for future online communications development.

Note: If your Practice Type is an O&G/IVF clinic, then this menu has Clinician and Scientist instead of GP and Specialist.

The *Default Bank Account* menu allows you to specify which bank account the receipt window defaults to when receipting any items billed in this user's name (to set up bank accounts see [Bank Accounts](#)).

Check Referral Validity in Appointments will check to make sure a patient has a valid referral whenever you book an appointment and when you arrive them into the waiting room. This check will only occur if the doctor you are booking the patient in to see has this option ticked.

Medical Registration Number allows you to record your Medical Registration Number. This is used on UK prescriptions.

OSHC Worldcare User ID allows you to record your OSHC Worldcare User ID for use in Worldcare claims.

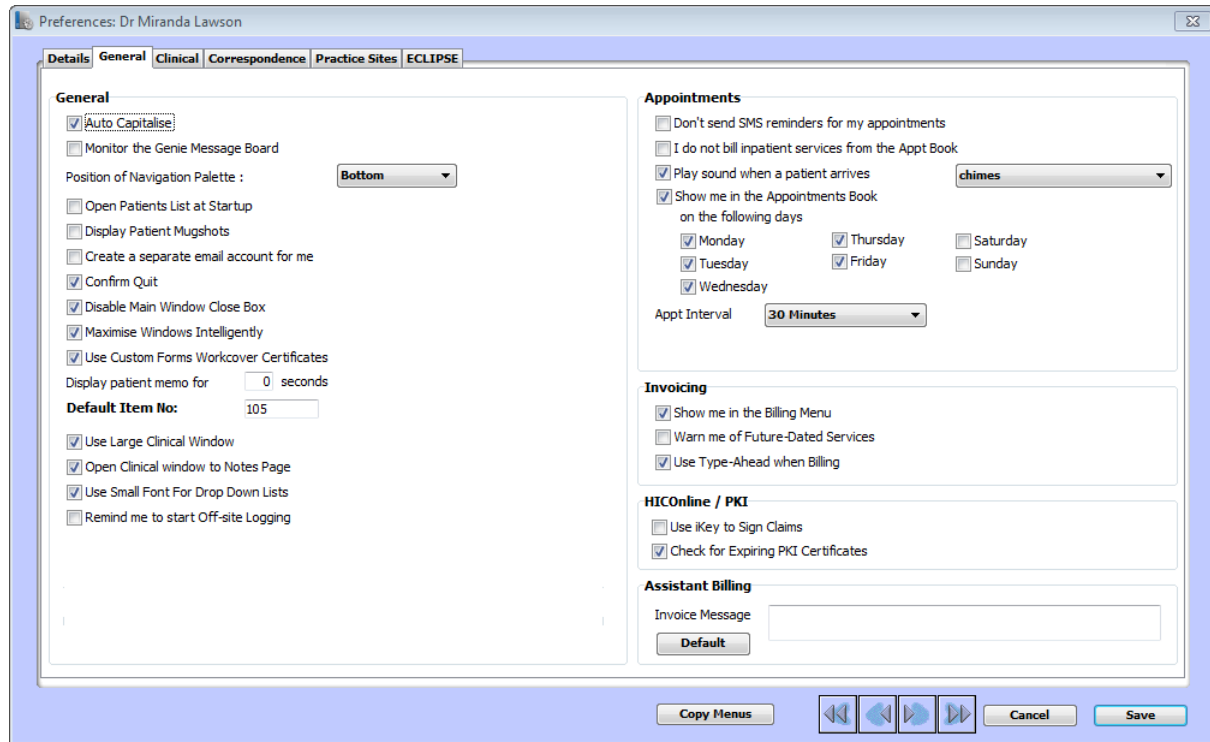
HPI-I is the Healthcare Professional Identifier-Individual used for eHealth purposes.

Activate for this User and the other My Health Record-related fields below this option are discussed in the My Health Record section.

Ticking *Inactive User* will remove this user from the login screen, Appointment Book and Billing menu. It would

be used if a user is going to be away for an extended period of time but intend on returning to the practice. To reactivate the user simply untick this box. This box is only visible when you have used **File > All User Preferences** to access a different user's preferences; it is not visible when you are in your own preferences.

4.2.2 The General Tab



General

Having *Auto Capitalise* ticked will result in the first letter of words in fields in the Patient Demographics window being automatically capitalised.

Monitor the Genie Message Board will provide you with an alert in the navigation palette when a new message is posted on the Forum. To subscribe to the message board go to www.geniesolutions.com.au.

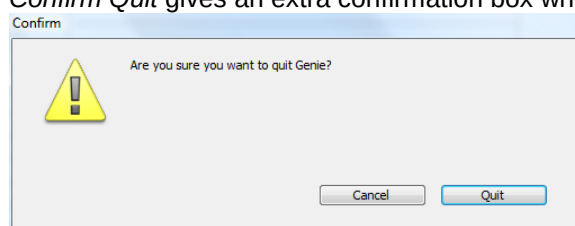
Position of Navigation Palette. The Navigation Palette allows you to keep track of what windows you have open in Genie and alert you to any outstanding Tasks, Results, Letters etc. This makes for quick navigation around Genie.

Open Patients List at Startup. If you are a solo practitioner or do not use the Appointment Book, then selecting this option will open the Patients List rather than the Appointment Book when Genie is launched.

Display Patient Mugshots allows you to display a picture of the patient when you open either their Patient Demographics window, or their Clinical Window. The picture needs to be attached to the patient's Clinical Window via the Image Browser, assigning it a type of 'Mugshot' (see [Viewing Images](#)).

Create a separate email account for me creates an email account for this user as the default when using the Genie Email module (see [Email](#) module).

Confirm Quit gives an extra confirmation box when quitting out of Genie.



Disable Main Window Close Box (Windows only) prevents the user from accidentally quitting out of Genie by clicking the red cross of the main Genie window.

Note: It is recommended that you tick this preference. Using the red cross to quit Genie can result in a phantom user on your network, this can result in an error message stating that there are 'too many users logged in'. Contact Genie Support via phone or email to rectify this problem.

Maximise Windows Intelligently will increase the size of the windows within Genie while maintaining the correct placement of the navigation palette.

Use Custom Forms Workcover Certificates allows you to use Workcover certificates that have been downloaded from **Special > Software Updates** (see [Software Updates](#)). This option is only available for users on Genie version 8.6.5 or higher. If this option is unticked, the Workcover certificates programmed into Genie will be used. For information on how to add certificates, see [Add Workcover Claim](#).

Display Patient Memo for X seconds Allows you to determine how long a patient's red memo box will remain on display when booking in an appointment. Setting this preference to zero will turn it off completely.

Default Item No: This is the item number which will appear as the default to be charged when you save out of the Clinical Window from the Appointment Book. You should enter your most commonly used item number so that it is ticked by default. If you would like the items to charge box to appear but not have an item ticked by default, enter a zero into this field. Leave this field blank to prevent the items to charge box from appearing.

Use Large Clinical Window. If your screen resolution is set to 1280x754 or higher in the display properties of your computer, then you can take advantage of the larger Clinical Window (See [Clinical](#)).

Open Clinical Window to Notes Page. Selecting this option instructs Genie to open to the **Notes** tab of the Clinical Window rather than the Summary tab, if you are not using the large Clinical Window.

Use Small Font For Drop Down Lists. This is for those who have extensive drop-down menus for Current Problems and Past History, for example, so the whole menu can be seen.

Remind Me To Start Offsite Logging. Selecting this option will prompt you to start offsite logging whenever you open this database with the single-user version of Genie. See the [Offsite Logging Chapter](#) for more information.

Appointments

Don't send SMS reminders for my appointments refers to the [Genie SMS Reminders](#) process which allows SMS reminders to be automatically sent to patients at a specified time prior to their appointment. If you do not want this process to run for your patients, tick this option.

I do not bill inpatient services through the appointment book. Ticking this box will prevent the display of the dialog box asking whether an invoice is to be Inpatient or Outpatient when billing from the Appointment book. This would be relevant to a General Practitioner who would not usually be billing for inpatient services or a Specialist who may only bill for inpatient work from the [Patient List](#) or directly from the procedure.

Play sound when a patient arrives. Ticking this preference for a provider will cause a sound to play when a patient appointment in that provider's column has its Status changed to *In Waiting Room*. The drop-down menu to the right of this tickbox allows you to select the sound you wish Genie to play.

Show Me In the Appointment Book creates a column for this User Name in the Appointment Book. De-selecting it will remove this user's column. Ticking the days that this user works will display this user's column in the appointment book for those days only.

Appt Interval This option allows you to have a different appointment interval to the default interval set in Appointment Preferences.

Note: This only has an effect when you are in your own personal view of the Appointment Book. If everybody has the same interval, you should set this to Use Global.

Invoicing

Show Me In the Billing Menu must be selected if you are a provider of services, otherwise your name will not appear in the *Provider* drop-down menu contained in the Add Item to Invoice window.

Warn me of Future Dated Services. Ticking this means that Genie will alert you if you enter a service date on an invoice that is in the future. This should be ticked for non clinical staff that do the billing to be sure they do not bill an invoice that is future dated by mistake, e.g. invoicing from a future appointment instead of today's.

Use Type-Ahead When Billing means that Genie will try to predict the complete item number you are entering provided the item number is ticked as *Display In List of Commonly Used Items* in the Billing Items record.

HIC Online / PKI

Tick *Use iKeys to Sign Claims* if you use individual iKeys to sign claims.

Tick *Check for Expiring PKI Certificates* if you would like to be notified when your certificates are due to expire.

Assistant Billing

Allows you to modify the Invoice Message that appears on any invoices that have an assist fee added using the **Include Asst's Fee** button. Clicking on **Default** will use the default Invoice Message.

Copy Menus

Clicking this button will display a list of all users in Genie. You can copy menus such as Current Problems, Past History, and QuickScript from the user you select to the current user preferences.

4.2.3 The Clinical Tab

Prescriptions

Print Medication List on Scripts. Selecting this option sets the checkbox for printing the patient's medication list whenever a prescription is printed to ON by default (see [Clinical](#)).

Print Certificate on Scripts. As for Print Medications above but for a Medical Certificate

Use Meal Times for Scripts. Selecting this option will change the way you specify dosage and frequency for prescriptions. Existing prescriptions will continue to print with the current dose and frequency until you fill in the new dosage fields. This is not an option which you should frequently change back and forth. Decide on the method you wish to use and then continue with it. This option is doctor specific, so if you share patients with other doctors in your practice, you should ALL decide on one method or the other.

Allow sending of Healthshare Fact Sheets when Prescribing. This option allows the sending of Healthshare fact sheets whenever a patient is prescribed a particular drug for the first time. For more information, see the [Adding a New Prescription](#) section under Clinical.

Enable NPS RADAR Alert. If you have the NPS RADAR documents installed, a summary is displayed for the first three times that a new RADAR drug is prescribed. When this checkbox is ticked, the user will be shown a pop up alert for all relevant drugs up to 3 times while prescribing them.

Record Anonymous NPS Usage Data. If this option is selected, the NPS usage data of this particular user will be recorded in the database using an anonymous unique identifier.

When a new NPS Version is available. This option will become available if you have Enable NPS RADAR Alert ticked. This allows you to specify in the drop-down menu what you would like to do if an update of the NPS documents become available. You have the option to either: *Install Automatically*, *Prompt Before Installing*, or *Never Install*. It is still possible to update the NPS documents manually via **Special > Software Updates**.

Access MIMS Annual via the internet. This accesses MIMS Annual documents via our Web Server rather than via the local machine, meaning that the MIMS Annual will no longer need to be installed or updated on each client machine as it is updated on our Web Server by us.

Interaction Checking. If you are using MIMS for prescribing, you can set the level of drug interaction checking here. Level 3 is usually the best compromise. If you set it to Level 0, it will warn you of just about everything, and you may become de-sensitised to the warnings.

Electronic Transfer of Prescriptions

If you are registered with MediSecure for the Electronic Transfer of Prescriptions, enter in the details as per the instructions below the *Host URL* field. At the time of printing the script, an electronic copy is sent to the MediSecure database. The script will also print with a barcode which the pharmacist will scan upon receiving the prescription from the patient. This will then allow the pharmacist, if also registered with MediSecure, to download the details of the prescription from the MediSecure database.

If you are registered with eRx for the Electronic Transfer of Prescriptions, enter in the details as per the instructions below the *eRx Host Platform* field. At the time of printing the script, an electronic copy is sent to the eRx database. The script will also print with a barcode which the pharmacist will scan upon receiving the prescription from the patient. This will then allow the pharmacist, if also registered with eRx, to download the details of the prescription from the eRx database.

Pathology & Radiology

Extract Path Results from PIT Format. Selecting this checkbox instructs Genie to attempt to extract individual results from PIT-formatted files, and insert them into a Consultation record so that they can be graphed. This only works for some pathology providers, depending on how they present the results. If you are getting nonsensical results in consultation records you should deselect this checkbox.

Move to Action List after linking. Select this if you would like to use the Pathology Action List for dealing with pathology and radiology results. (See [Pathology Recalls](#)).

Check for Missing Run Numbers. If this is selected, Genie will check for missing pathology results whenever the Pathology & Radiology window is opened. If a run is missing Genie will warn you about it for 30 days. It is expected that you would contact the lab and request them to send the missing run again. You can switch off this warning, however this is not recommended.

Bulk Bill Pathology. Selecting this will instruct Genie to automatically mark the Bulk-Bill option on printed pathology requests.

Note: The patient must have a valid Medicare Number for this to work.

Copy Results to Interested Parties enters the patients interested parties into the CC section of Pathology & Radiology requests.

Offer to store INR Results provides a prompt to save INR results into the INR Control after they have been imported. INR Control is accessed through the Tools menu in the Clinical Window of the patient.

Offer to store TFT Results prompts you to save imported TFT results into the Thyroid Control. Thyroid Control is accessed through the Tools Menu in the Clinical Window of the patient.

Prompts

Do Not Show Prompts Window. prevents the red prompt window from being displayed in the Clinical Window.

Pap Smear & Mammogram Alert. Selecting this option gives you a warning if a pap smear/mammogram has not been recorded whenever you open the Clinical Window of a female between 20 and 70 and who has not been marked as having had a hysterectomy in their Past History provided they are not marked as *Don't Recall* in their Clinical Window.

Overdue Recalls Alert warns you if there are any overdue recalls for a patient.

Warn of pathology results received within the last. If you enter a number of days here, Genie will give you a warning if there are any results received within that time frame when opening the Clinical Window.

Other Warnings. Depending on the age and sex of the patient, Genie will warn if you have not checked a variety of the parameters stored in the Consults Parameters, e.g. BP, Weight, Height, Cholesterol, PSA.

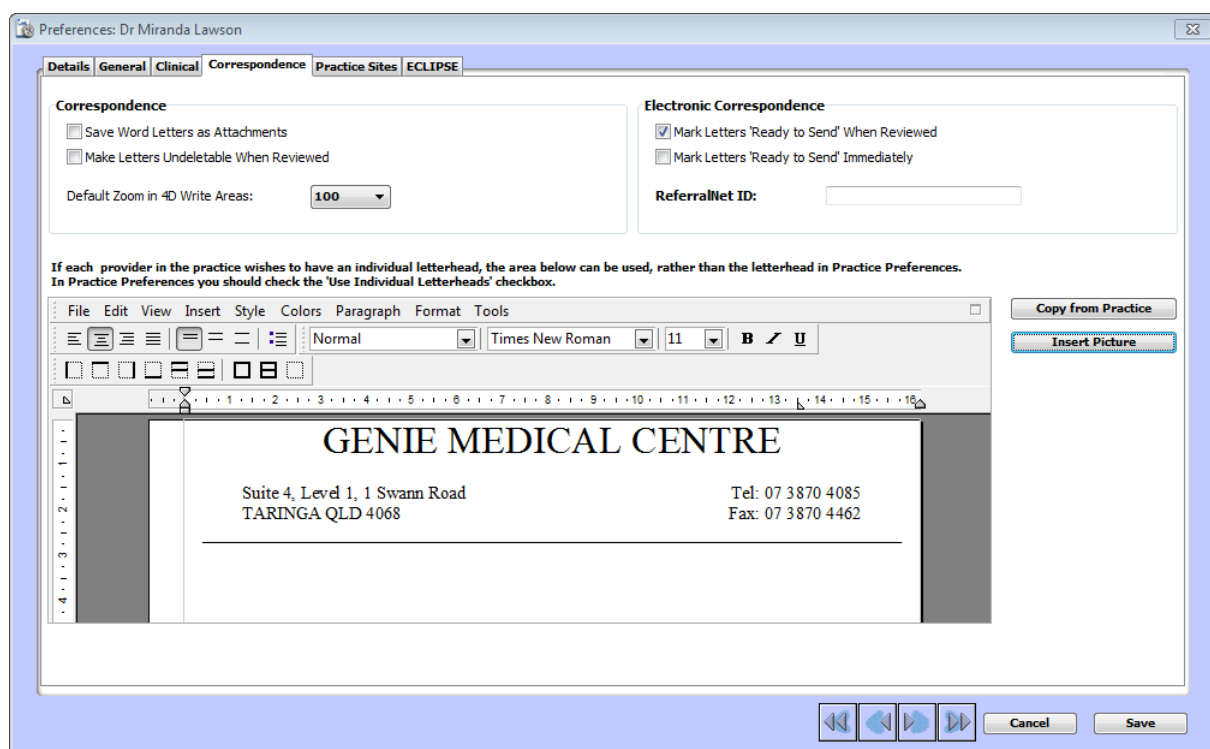
Synchronising

You can choose to synchronise your appointments and tasks to and from Outlook/iCal or one way only by choosing the appropriate radio button. You would choose one way if you don't want appointments deleted from Genie to be reinstated when you next synchronise from Outlook/iCal. For more information on synchronising see [Synchronising With iCal/Outlook](#) in the Clinical section.

Synchronise the Address Book. Tick this if you wish to Synchronise your Address Book (See [Synchronising with iCal/Outlook](#) in the Clinical Module).

Tick '*Only synchronise those with an email address*' if you wish to only synchronise address book entries which have an email address.

4.2.4 The Correspondence Tab



Correspondence

Save Word Letters as Attachments. This option should be ticked if the user prefers to type in Word rather than directly in Genie's letter writer. An explanation of using Word through the referral/reply template can be found in the Button Description section of [Referral/Reply Letters](#). Once the letter is reimported into Genie using the red W in the Referral/Reply letter it will actually be saved as an attachment rather than as Correspondence Out. This is to avoid any issues with Word crashing Genie on some occasions.

Make Letters Undeletable when Reviewed. Having this ticked prevents letters from being deleted after they have been marked as *Reviewed* by the Doctor.

Default Zoom in 4D Write Areas. When opened, all letters will automatically be zoomed to this percentage of the letter area. This includes the contact display area in the Add Consult window.

Electronic Correspondence

Mark Letters 'Ready to Send' when Reviewed indicates that once letters have been ticked as Reviewed, they will be marked as Ready to Send for the third party carrier software to send on to the recipient. This option is best suited to clinicians who review their letters once typed by a secretary or typist.

Mark Letters 'Ready to Send Immediately' indicates that letters will be ready to send to the third party carrier software once created and saved. This option is best suited to clinicians who create their own letters.

ReferralNet ID. ReferralNet is a third party provider for sending correspondence electronically. Enter their individual identifier here if you are signed up to use them.

Letterhead

If you are in a multi-doctor practice and each doctor would like to have their own letterhead, this is where you can set up your individual letterhead. By default, Genie uses the letterhead set up in your Practice Preferences record (**File > Practice Preferences**). However, if you select the 'Use Individual Letterheads' checkbox in Practice Preferences, then Genie will use the letterhead of whichever doctor is the Provider of a billed service.

Note: You can copy the letterhead already set in Practice Preferences.

You can also insert pictures or logos in the letterhead (see [Practice Preferences](#)).

Note: Genie allows approximately eight lines worth of text in the letterhead. If you find that your letterhead is being truncated when printing invoices, then you will have to reduce the size of it here by either reducing the font size or reducing the number of lines.

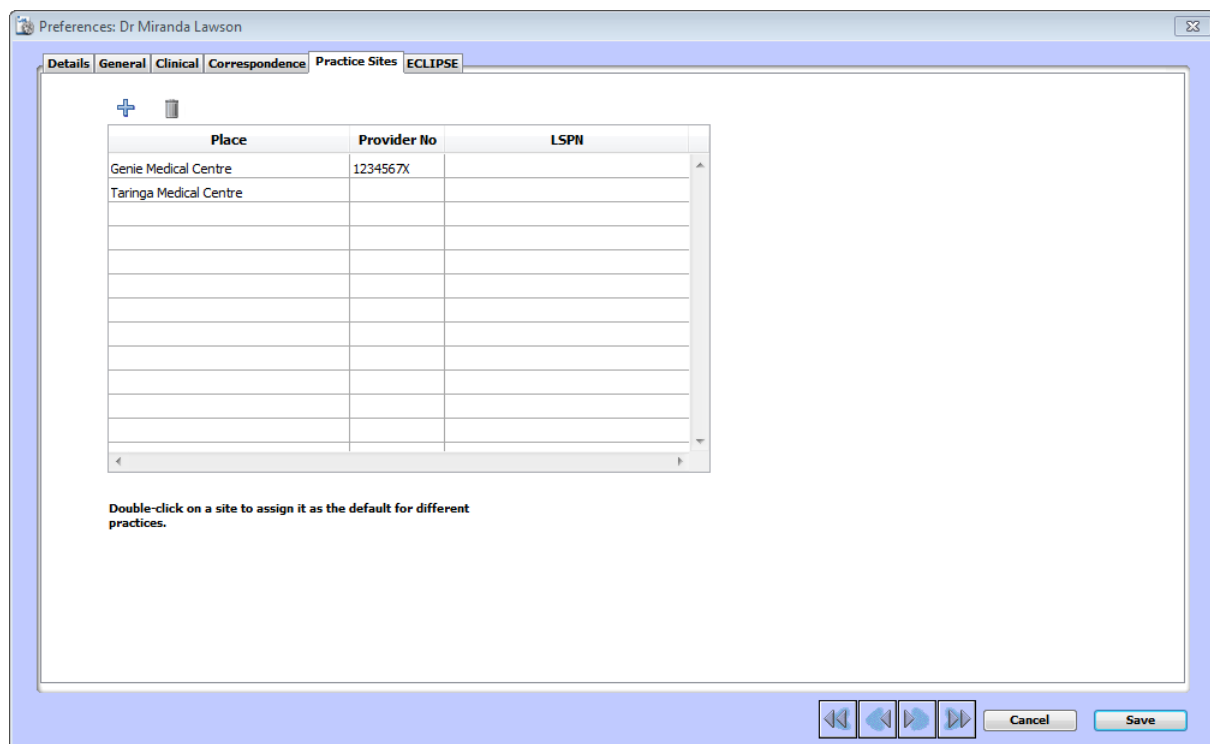
Deleting a Corrupted Letterhead

Sometimes the Letterhead can become corrupted. The symptoms of this are that Genie is unable to print invoices and x-ray requests. We rarely encounter this problem, and usually only on Macintosh computers, however if this does occur, the letterhead can be cleared by holding down **Alt** whilst selecting **File > User Preferences**. You can then open the record and rebuild the letterhead.

The **Copy from Practice Preferences** button allows you to copy your existing Preferences Letterhead.

The **Insert Picture** button works in the same way as it does in the [Practice Letterhead](#) section. This allows you to insert pictures into your letterhead.

4.2.5 The Practice Sites Tab



If you work in multiple locations with different provider numbers, this is where you can set up your extra sites.

To add a new site, click on the **Blue Plus**  button. This will open a window allowing you to enter the name of the site, your provider number at this location, LSPN and facility ID (if applicable).

The *Default Site for which practice?* drop-down menu allows you to choose which site of service will be selected by default when you invoice a patient. If you would prefer for there not to be a default site, meaning it would need to be selected for each invoice, then you would need to tick *No Default Site of Service on Invoices* in the [Practice Details tab](#) of the Practice Preferences.

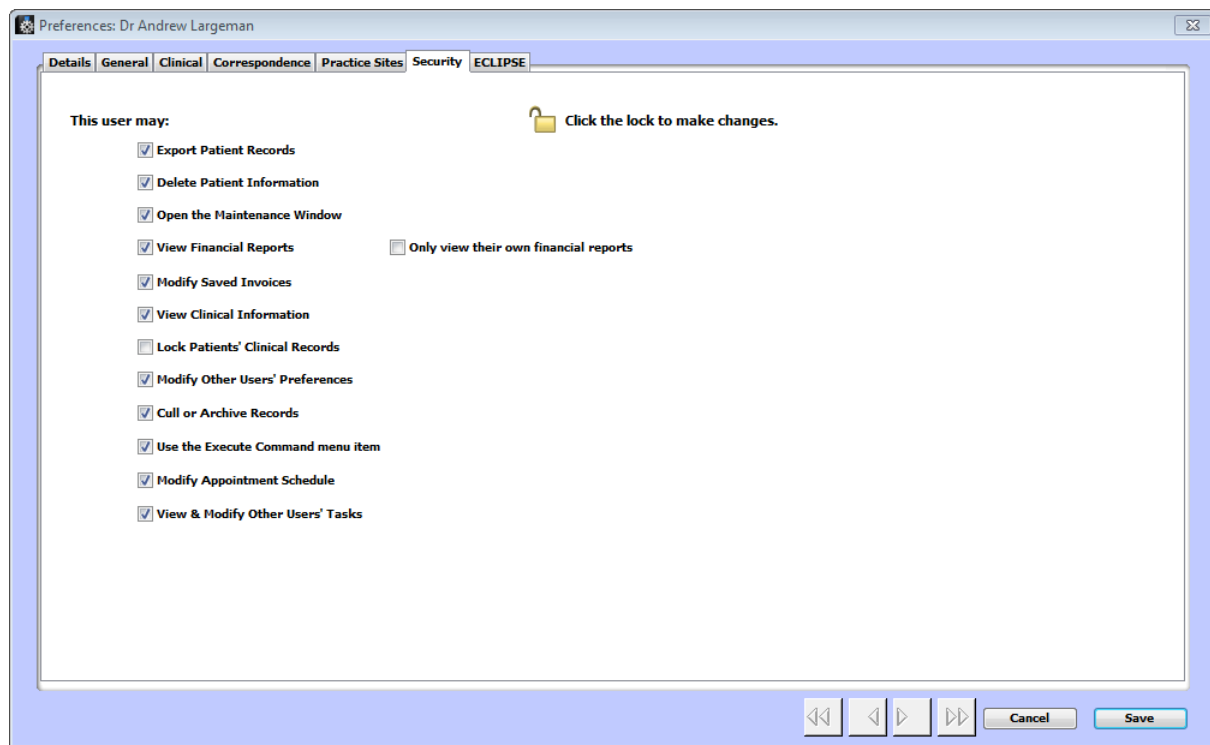
The *Inactive* checkbox allows you to make this site of service inactive if you no longer practice at this location. Making a site of service inactive means that it will no longer be able to be selected from relevant windows (i.e. Invoicing window) but you can retain a record of this information in your data file.

Once all this information has been entered, click **OK** to save.

If you have accidentally created a site and would like to remove it, click the **Delete**  button.

4.2.6 The Security Tab

Note: If you are using version 8.5.7 or higher, the Security tab will not be present; these security preferences are instead dictated by the Edit Groups window. For more information, please see the [Edit Groups](#) section of Practice Management.



This window allows you to set the security level for each user in Genie. To change any of these settings, click on the Padlock button and enter in the Administrator's password.

Export Patient Records

If this is ticked, this user has the ability to export patient records out of Genie. You would usually untick this for a locum or similar.

Delete Patient Records.

Having this option ticked allows this user to delete patient records in Genie.

Note: Patient records cannot be deleted from Genie if the patient has either clinical or billing information entered in their file.

Open the Maintenance Window

Allows this User access to the Maintenance & Reports window (**File > Maintenance & Reports**).

View Financial Reports

Allows this User access to Financial Reports in the **Practice Analysis** tab of Maintenance & Reports.

Only view their own financial reports

Restricts viewing of summarised financial data to this User's data only. They will not be able to view other doctors' reports. Receptionists will not be able to access any of the financial reports if this option is ticked, regardless of whether they have View Financial Reports ticked.

Modify Saved Invoices

Allows this user to edit invoices in patients' Account Histories.

View Clinical Information

Allows this user to view the Clinical Windows of all patients.

Lock Patients' Clinical Records

Provides the user with the ability to lock patients' Clinical Windows to all other users. The record will only be able to be unlocked by this user's password. See [Edit Patient](#).

Modify Other User's Preferences

Allows this user to make modifications to other User Preferences records.

Cull or Archive Records

Allows this user to cull and/or archive records in Genie

Use the Execute Command menu item

Allows this user to access the Execute Command window (**File > Execute Command**). The Execute Command window is only used under instruction

Modify Appointment Schedule

Allows this user to make changes to the Appointment Schedule. See [Appointment Scheduler](#).

View & Modify Other Users' Tasks

Allows this user to see and make modifications to other users' tasks in **Open > Tasks**. See [Tasks](#) for more information.

4.2.7 The ECLIPSE Tab

This tab will be activated when your practice is registered for ECLIPSE online health fund inpatient claiming and will list all Health Funds configured within Genie. The list of funds allows you to define the Payee ID and Claim type for each fund (for the selected provider only). For more information, please see the ECLIPSE Manual provided at your ECLIPSE install or download it via **Special > Software Updates, PDFs** tab.

For more information on purchasing ECLIPSE and using it with Genie, please see the [ECLIPSE Information](#) page on the Genie website.

4.3 Bank Accounts

Before you can receipt, you must have at least one bank account record. You can add, modify and delete bank account records by selecting **Open > Bank Accounts**, which will open the window below:

New Record

Bank Account Details

Bank Code

Bank Name

BSB Code

Account Name

Account Number

Direct Deposit Reference

☐ Accept Direct Deposit payments for this bank account

BPAY

BPAY Biller Code

Credit Cards Accepted ☐ Yes ☐ No

Genie will auto-generate the Customer Reference Number required for BPAY transactions

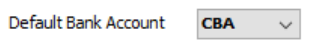
Navigation buttons: [Back] [Forward] [Home] [Search] [Print] [Cancel] [Save]

Each bank account must have a unique *Bank Code*, which can be up to 3 characters in length. This code can be anything you choose, e.g. "NAB" for the National Australia Bank. In a multi-doctor practice, where each doctor has their own account, you can make each code the initials of the relevant doctor.

If you plan on using BPAY to accept payments into this account, enter the *BPAY Biller Code* in this window. The

biller code will appear on printed invoices if *Accept BPAY* is ticked in [Practice Preferences](#) (**File > Practice Preferences**).

In each provider's User Preferences (**File > All User Preferences**), you must assign a default bank account, as shown below.



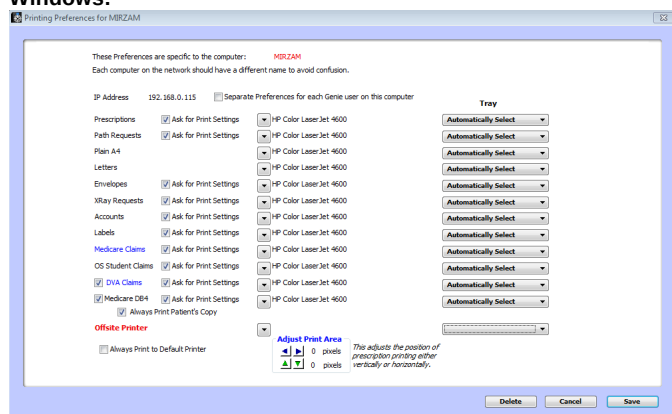
When you create a receipt, Genie will use the default bank account of the first provider in the list of outstanding items.

4.4 Printing Preferences

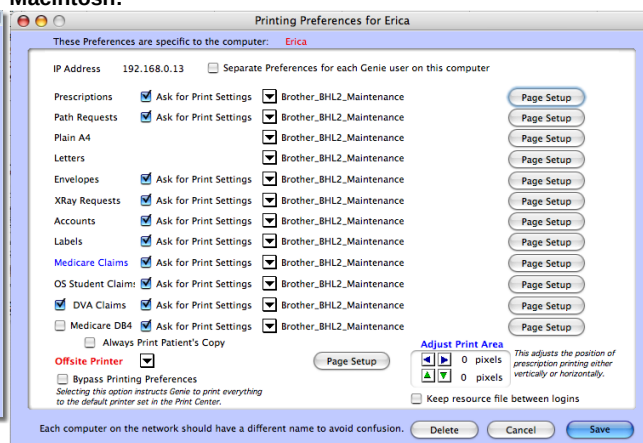
Each computer on a network has its own set of Printing Preferences, which instruct Genie to use a particular printer and tray for different printing jobs. Each computer on a network must have a different name, otherwise there will be printing confusion unless all computers print to the same printer.

To open Printing Preferences select **File > Printing Preferences**.

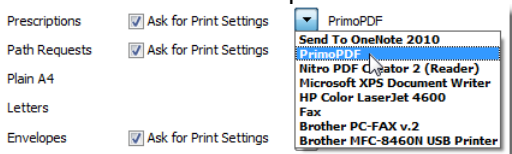
Windows:



Macintosh:



There are twelve different printing jobs listed in this window. For each job, you can select the appropriate printer from the black arrow drop-down menu. This menu will display all the printers installed on your computer.

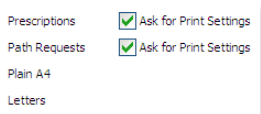


Note: If the printer you would like to select isn't shown, it either isn't installed or isn't installed properly; Genie has no control over this list.

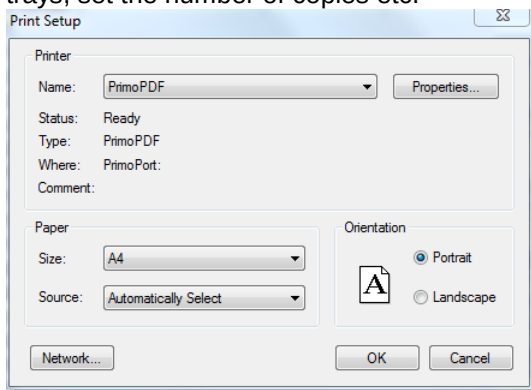
On Windows, once you have selected a printer, the available trays for that printer are displayed in the Tray menu to the right of the printer. Select the tray that you would like each job to go to.

On Mac, the **Page Setup** button allows you to save the options in the Print Dialog screens.

If automatic tray selection doesn't work as expected on your printer, you should select the *Ask For Print Settings* checkbox, so that it can be selected manually in the Print Dialog.



The Print Dialog is the window that usually appears when printing in which you can change printers, set the trays, set the number of copies etc.



If you don't select this option, Genie will simply print immediately to the selected printer. Plain A4 and Letters will always open the Print Dialog when printing, therefore this option is not available for these documents.

Note: If you would like to select Ask for Print Settings for all types of documents at the same time, Alt+click on the first checkbox and Genie will automatically select all of them.

If you only use the one printer then you can select the *Always Print to Default Printer* checkbox and have everything print to your default printer. This makes printing a little faster because Genie doesn't have to reference the Printing Preferences to print.

Keep resource file between logins, if left unticked, will automatically delete the Genie.res file from the 4D Preferences folder when quitting the client to ensure that updated resources (e.g. version number and date, etc) are downloaded from the server when the server is updated. If you do not wish for this to occur then tick the option to keep the resource file.

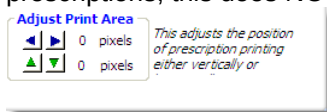
Separate Preferences for each Genie user on this computer only refers to people who are using Terminal Services.

Medicare DB4, should only be ticked if you are using HIC Online.

You can have the *DVA Claims* ticked if using either manual batching or HIC Online.

Adjusting the Print Area

The four green and blue arrows at the bottom left of this window are used to adjust the position of printed text on prescriptions, this does NOT apply to any other document types.

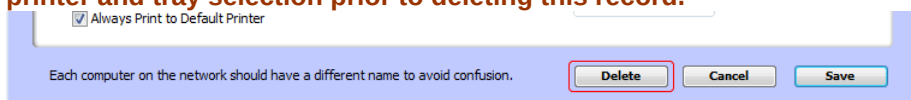


As each printer has different default margins, you may need to adjust the positioning for prescriptions in order for them to print in the correct position on their pre-printed sheets.

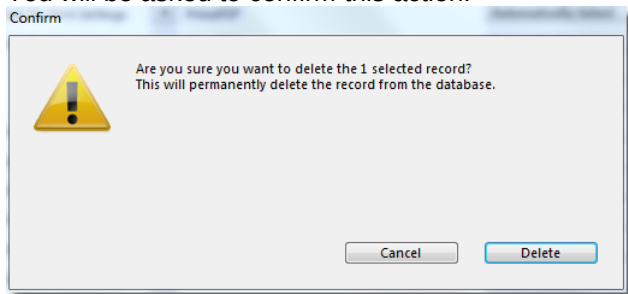
Deleting the Printing Preferences

Occasionally, the Printing Preferences record may become corrupted and printing may be affected. In this case, the record can be deleted by going to **File > Printing Preferences** and clicking on the **Delete** button down the bottom of this window.

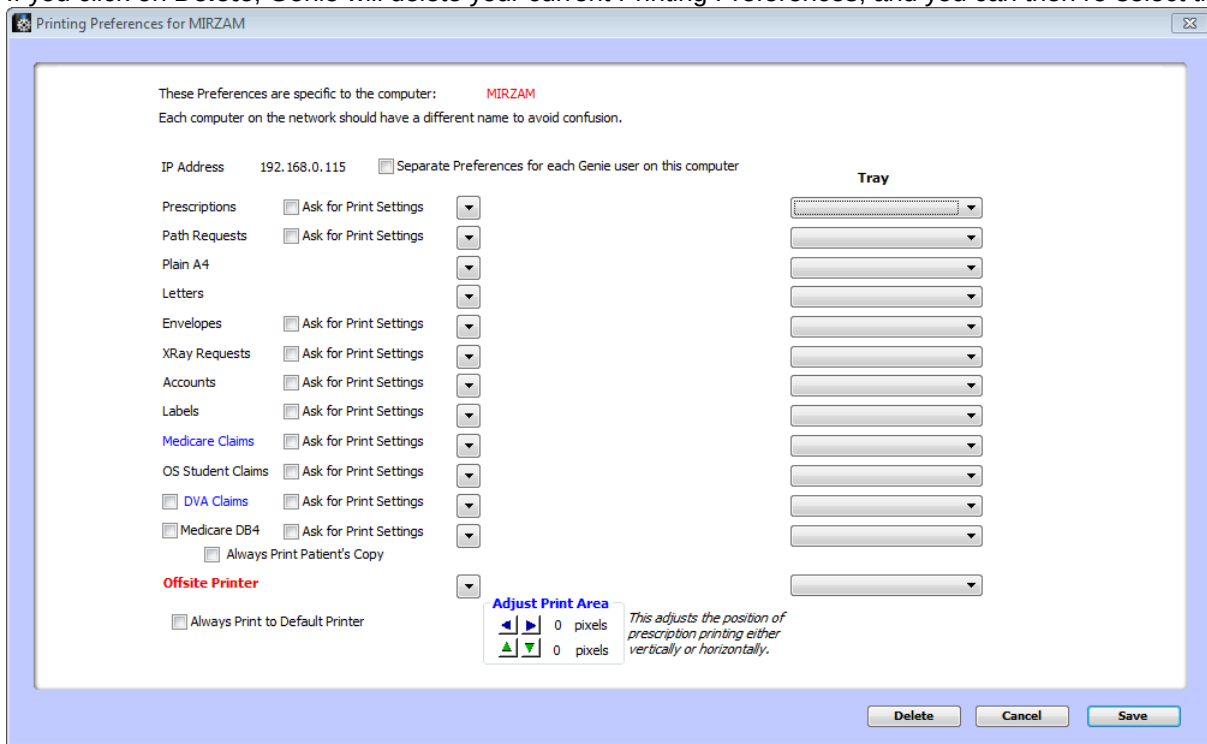
Note: If you have a particularly complex printing setup, it is recommended that you take note of your printer and tray selection prior to deleting this record.



You will be asked to confirm this action.



If you click on **Delete**, Genie will delete your current Printing Preferences, and you can then re-select them.



4.4.1 Troubleshooting

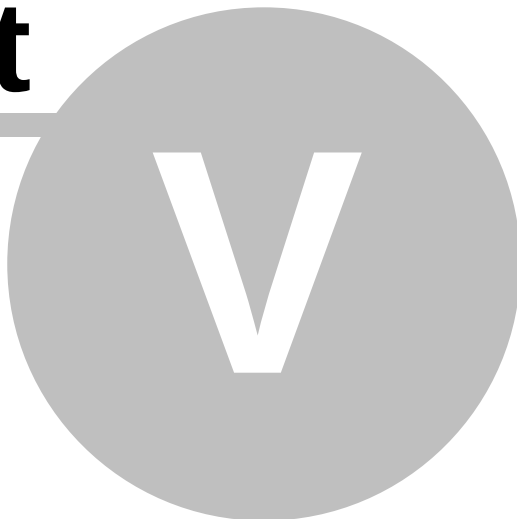
Printing problems are probably the most common problems encountered by anybody using a computer. There are literally dozens of things that can go wrong ranging from the simple (e.g. the printer isn't switched on) to the complex (e.g. a corrupted printer driver).

Note: Before calling the Genie support line, please perform the simple diagnostic steps below to at least exclude some common problems.

1. Switch the printer off and on again. If there is a blockage in the queue this may clear it.
2. Check the printer queue to see if there is a blockage that has stopped printing.
 - On Macintosh, open the Print Center utility at **/Applications/Utilities/Printer Setup Utility/**. In fact, it's a good idea to create a shortcut to the Print Center in your Dock.
 - On Windows, select **Start Menu > Devices and Printers** and open the relevant printer.
3. Check the cabling! Unplug and re-insert the cable at either end.
4. Reselect the printer in Genie's Printing Preferences.
5. Try printing from another application. If you can't then the problem is with your printer, not Genie. If you can print outside Genie, the problem is probably with Genie.
6. Try printing from another computer on the network.

If you still haven't found the cause, call our support line. Performing these few simple steps first, can turn a prolonged consultation with our Help Desk into a short one!

Part



The Reception Module

5 The Reception Module

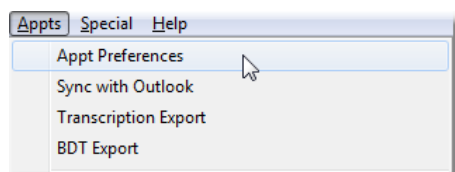
The following chapters relate to procedures most relevant to receptionists.

5.1 Appointments

The Appointment Book is the module that ties everything together. Genie has been designed to allow both doctors and receptionists to work from the same screen at the same time so that each can immediately see what is happening in the practice. This enable them to communicate easily and effectively which improves the workflow between receptionists and doctors. It is possible to use Genie without using the Appointment Book, however you lose the benefits of integrating the receptionists and doctors actions.

5.1.1 Appointment Preferences

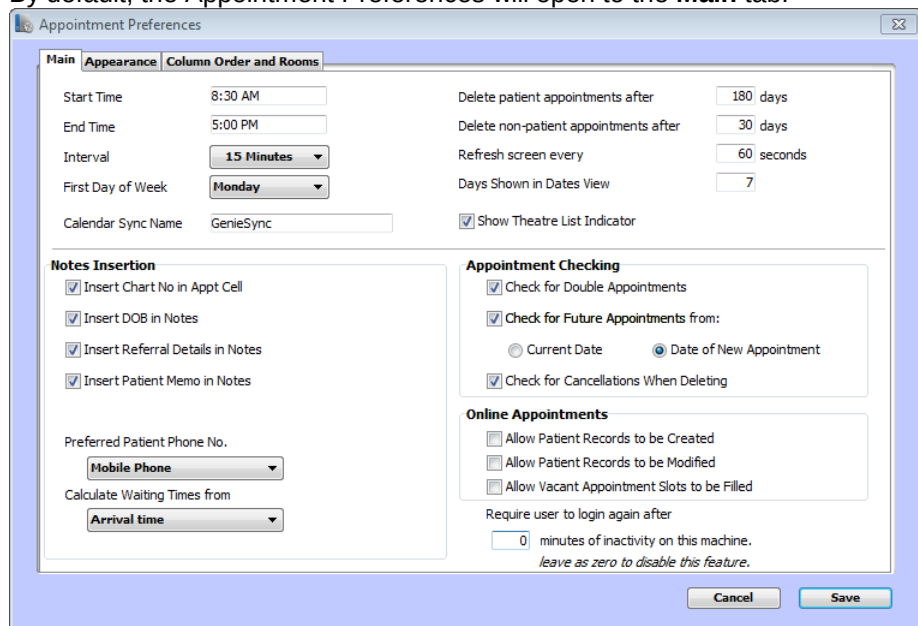
To modify your Appointment Preferences, go to **Appts > Appt Preferences**.



Alternatively, click on the **Appointment Preferences**  button in the Appointment Book.

5.1.1.1 The Main Tab

By default, the Appointment Preferences will open to the **Main** tab.



The *Start Time* and *End Time* are the earliest and latest times displayed in your appointment book for all doctors. This is a global setting and cannot be adjusted for individual doctors.

Note: Time must be entered in 24 hour format i.e. 06:30PM = 1830.

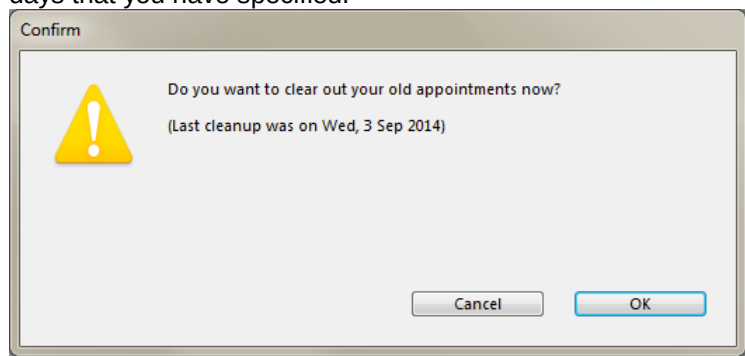
Interval is the length of time for a normal appointment. If each of the providers at your practice have different appointment lengths, these should be set from their User Preferences. See [User Preferences](#) for more information.

First Day of Week is the first day that will display on the calendar in the Appointment Book. Depending on your preference, this is usually either Sunday or Monday.

Calendar Sync Name is used for syncing with iCal/Outlook. By default this will be GenieSync. For more information, see [Synchronising With Outlook/iCal](#).

Delete Patient Appointments After X Days specifies how long you would like to keep a patient appointment record in the Appointment Book. Most practices set this to 180 days (6 months). Setting it to 9999 days will result in appointments effectively never being deleted. However, keeping appointments indefinitely can cause slowness in the Appointment Book. Each time you click a date in the appointment book, Genie must search through all appointment records in the database to find the appointments for that specific day. If you do experience slowness, then we would recommend changing the number of days to a lower number.

When the first client machine quits out of Genie for the day, a message will appear asking if you would like to clear out your old appointments now. Clicking **OK** will delete appointments that are older than the number of days that you have specified.



This is one of the reasons why client computers should quit out of Genie at the end of the day, even if you choose to leave the Genie Server running.

Note: Only the record in the Appointment Book is deleted. All billing and clinical records are retained.

Delete Non-Patient Appointments After X Days works in the same way as the *Delete Patient Appointments After X Days*, however it only applies to non-patient appointments (e.g. 'Pharmaceutical Rep Lunch') and appointment types that do not have a patient appointment booked over them.

Refresh Screen Every X Seconds instructs Genie to display changes which may have been made on another computer on the network at this specified interval. This setting is not relevant for single users. The recommended refresh setting is 60 seconds; the minimum allowed setting is 30 seconds.

Note: You can force a screen refresh at any time by clicking on the TODAY button above the calendar in the Appointment Book. If the doctor is relying on having patients marked as 'In Waiting Room', they should click on the TODAY button at the end of each appointment to see if another patient is waiting.

Days Shown in Dates View allows you to specify the number of days you would like displayed when viewing the appointment book in date view (see [Appointment Views](#)). This would usually be the number of days in your working week. The larger this value is, the slower your Appointment Book may be.

Show Theatre List Indicator allows you to manually indicate the status of the theatre list for an individual provider on a particular day. Ticking the checkbox in the appointment book will allow you to cycle between: *No List Today*, *Slots Available* and *List Full*.



The selected day will then be displayed in the calendar as green (if *Slots Available* is selected) or pink (if *List Full* is selected).

Su	M	T	W	Th	F	S
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

Notes Insertion

Insert Chart No in Appt Cell will insert the patient's chart number next to their name in the *Appointment* field of the appointment book when an appointment is made. These notes are visible when in the single provider view.

Insert DOB/Referral Details/Patient Memo in Notes will insert the patient's DOB/Referral Details/Patient Memo into the *Notes* field of the appointment book when an appointment is made. These notes are visible when in the single provider view.

Note: Ticking or unticking these options will only affect appointments added into the Appointment Book in the future. It will not affect existing appointments.

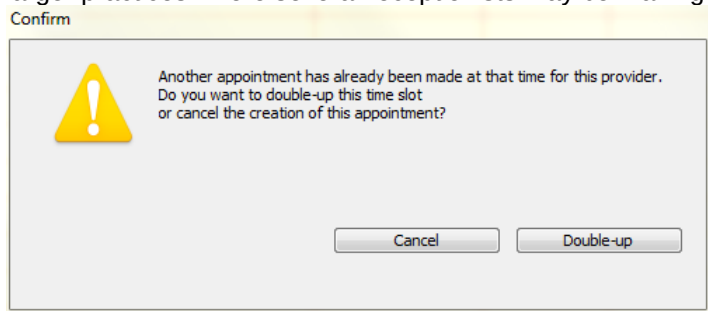
Preferred Patient Phone No. is the phone number that will display by default in the *Phone* column of the Appointment Book when in the single provider view.

Calculate Waiting Times From allows you to select if you want patient waiting times to be calculated based on their *Appointment Time*, their *Arrival Time* or *Never*. When you mark a patient as "In Waiting Room" by selecting them from the Appointment book and clicking on the **In Waiting Room**  button (or selecting *In Waiting Room* from the *Status* drop-down menu), Genie will calculate the time it takes until the patient's Clinical window is opened. In the case that the waiting time is calculated based on their appointment time, if the patient is put into the waiting room and their Clinical window is opened before their appointment time, the waiting time will appear in the Appointment Book as a negative number. You can switch options at any time and the waiting times will be recalculated for anyone that has not been seen that day.

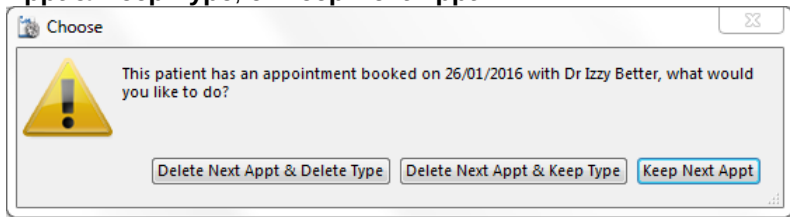
Note: If you open the Clinical Window prior to marking the patient as "In Waiting Room", the waiting time will be calculated from the appointment time, even if your preferences indicate it should be calculated from the arrival time.

Appointment Checking

Check for Double Appointments alerts you if there is a conflict when moving appointments in the appointment book. If you move an appointment to a time that already has an appointment booked, a message will appear giving you the option to **Double-up** the time slot or **Cancel** the creation of the appointment. This is useful in larger practices where several receptionists may be making appointments at the same time.



Check for Future Appointments will check to see if the patient has any appointments booked in the future from either the *Current Date*, or from the *Date of the New Appointment* you are making. If Genie detects a future appointment, a message will appear giving you the option to **Delete Next Appt & Delete Type**, **Delete Next Appt & Keep Type**, or **Keep Next Appt**.



Check for Cancellations When Deleting will alert you if there are patients waiting for a cancellation when you delete a patient from the appointment book. For more information on how to use this feature, see [Cancellation List](#).

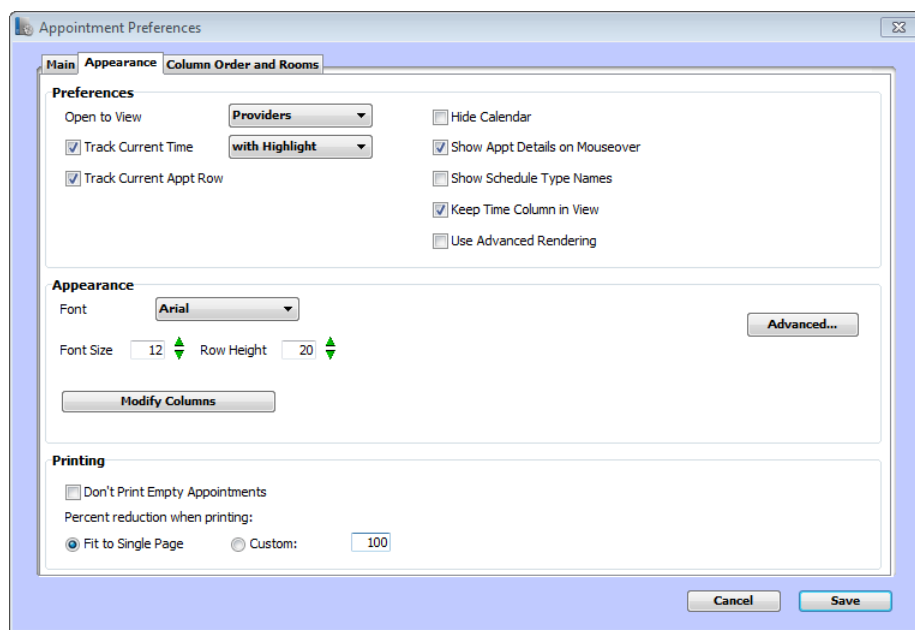
Online Appointments

These options are specifically for practices who are using an online appointment booking service. Please contact your nominated Online Appointment provider regarding these options.

Require User to login again after X minutes of inactivity on this machine will present users with the login window after a specified period of inactivity. **Note: The minimum time you can set is 5 minutes.**

Users will be required to select their username and enter their password to continue using Genie. In order for this feature to work, either the Appointment Book or the Patients list must be left open. If the time is left as 0 minutes, this feature will be disabled.

5.1.1.2 The Appearance Tab



Preferences

Open to View allows you to select which of the four views to open the Appointment Book to by default: *Providers*, *Dates*, *Rooms* and *List*. You can switch between these views at any time by clicking on the appropriate view button from the Appointment Book.



Track Current Time gives you the option to track the current time in the Appointment Book by *highlighting* the current time or displaying a *clock* icon. Genie does not store the time within the program, it gathers this from the regional settings on the Server computer. If your time within Genie is incorrect, you should check these settings on your server computer.



Track Current Time with Clock



Track Current Time with Highlight

Track Current Appt Row will highlight the time column for the appointment cell that you have selected in the Appointment Book. This allows you to easily keep track of the appointment row selected if you have multiple doctors entered into the Appointment Book.



Hide Calendar will change the appointment view between normal view and hide calendar mode. In normal view, the calendar and buttons are displayed on the left-hand side of the screen. In hide calendar mode, the calendar is not displayed and the buttons appear at the top of the screen. This can also be changed by clicking on the long date with the red background below the **TODAY** button (i.e. *Thu, 28 Aug 2014*) in the Appointment Book.



Show Appt Details on Mouseover allows you to view any notes that you have chosen to be inserted into a patient's appointment (see [The Main Tab](#)) by hovering over their name. This is particularly useful for double booked appointments as it allows you to view both patients' information quickly and easily. This feature can cause slowness in the Appointment Book, so if you are experiencing slowness it is recommended that you untick this preference.

Show Schedule Type Names allows you to see the appointment type name over the top of the appointment type colour. If this option is not selected, you will only see the appointment type colour. You must have the **Show**

Appointment Schedule  button turned on in the Appointment Book for this feature to work.

09:00 AM	Followup
09:15 AM	Followup
09:30 AM	Followup
09:45 AM	Followup
10:00 AM	Followup
10:15 AM	Followup
10:30 AM	Followup

Show Schedule Type Names

09:00 AM	
09:15 AM	
09:30 AM	
09:45 AM	
10:00 AM	
10:15 AM	
10:30 AM	

Hide Schedule Type Names

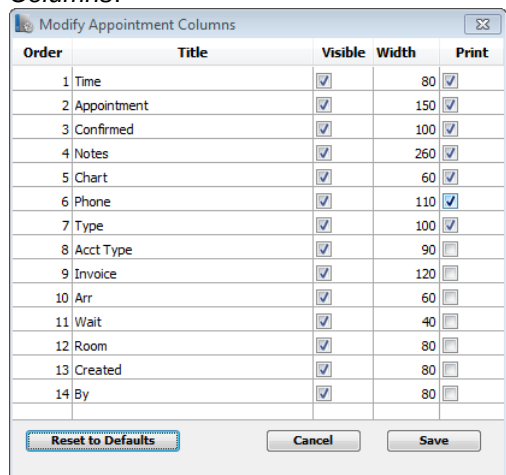
Keep Time Column In View will allow the time column to remain in view when you are scrolling across or down the Appointment Book. This is useful in practices that may have several providers in the Appointment Book.

Use Advanced Rendering will improve the general appearance of selected appointments. This can compromise the speed of the Appointment Book if you are using older hardware or hardware that does not meet our hardware requirements.

Appearance

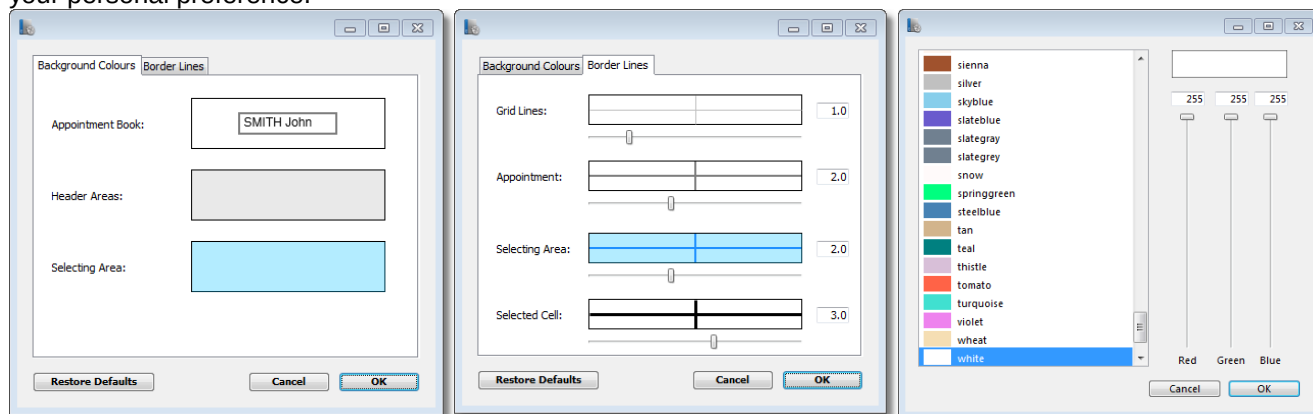
If the default *Font*, *Font Size*, or *Row Height* in the Appointment Book is too large or too small, you can adjust it here to suit your personal preferences. These are user specific preferences so it will not affect other users. In general, the easiest-to-read onscreen font for Macintosh is 'Geneva', and for Windows 'Arial'.

The **Modify Columns** button allows you to specify which columns are displayed, which columns you would like to print (see [Printing Appointment Book](#)), the order of the columns and the column width while in the single provider view of the Appointment Book. You can also access the Modify Columns window from the single provider view in the appointment book by right clicking on the column names and selecting *Modify Appointment Columns*.



Note: In order for this button to be enabled, you must have the Appointment Book opened to a single provider page before opening the Appointment Preferences.

The **Advanced...** button allows you to customise the colour and appearance of the Appointment Book to suit your personal preference.



The **Background Colours** tab allows you to change the colour of the:

- *Appointment Book*: The default patient appointment background colour;
- *Header areas*: The provider headers, column names and time column background colour;
- *Selecting area*: The colour that will appear when selecting multiple cells.

Click on the box to select the colour you would like to use. You can further customise the selected colour by either typing a value in the field or moving the slide bars for *Red*, *Green* or *Blue*.

The **Border Lines** tab allows you to change the colour and thickness of:

- *Grid Lines*: The Appointment Book grid lines;
- *Appointment*: The border line surrounding an appointment;
- *Selecting Area*: The border line when selecting cell/s;
- *Selected Cell*: The border line of the selected cell/s.

Adjust the thickness of the lines by typing a value in the field or moving the slide bar below the relevant box. Click on the box to select the colour you would like to use. You can further customise the selected colour by either typing a value in the field or moving the slide bars for *Red*, *Green* or *Blue*.

The **Restore Default** button allows you to restore the colours and grid lines to their default settings.

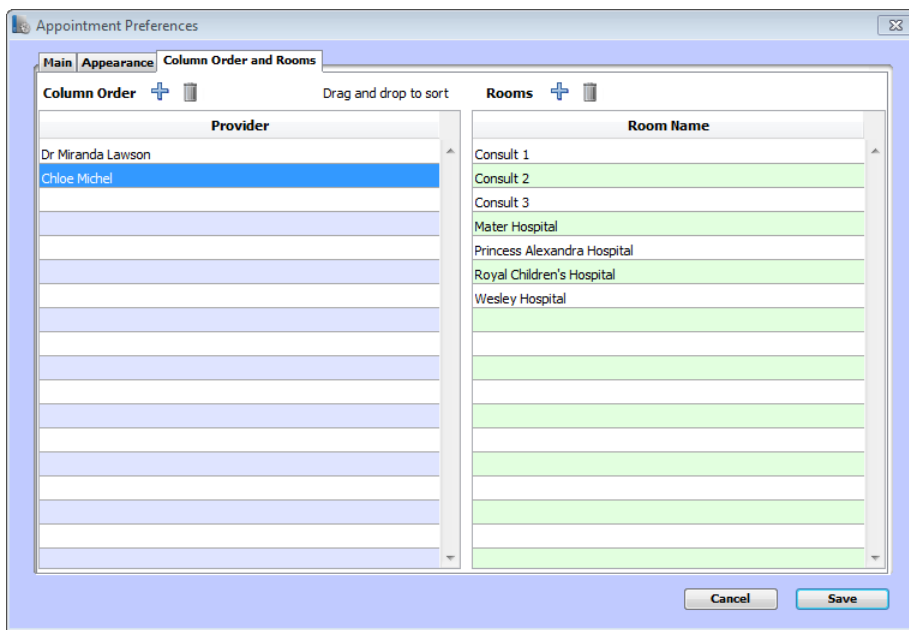
Printing

Don't Print Empty Appointments instructs Genie to print only appointments cells that have patient appointments in them. Some practices do not select this option as they prefer to see the empty slots on the printed appointment sheet.

Percent reduction when printing gives you the choice on how you would like your Appointment Book reduced when printed: *Fit to Single Page* or *Custom*. The *Fit to Single Page* option will automatically reduce the Appointment Book so that it can fit onto one page. The *Custom* option allows you to manually enter in a percentage value to reduce the Appointment Book, which may take multiple pages. A reduction of approximately 70% is most commonly used.

Note: What is printed is dependant on the number of columns you have selected to print in the **Modify Columns** window as well as the column widths. You should experiment with the reduction options and **Modify Column** settings so that the Appointment Book prints the way that you want it to appear.

5.1.1.3 The Column Order and Rooms Tab



Column Order

The Column Order defines which order providers' names appear in the Appointment Book. Changes made to the column order are user specific so it will not affect other users. To rearrange the order of providers, click and drag the names in the list and put them in the order you want. The top-most name will appear as the left-most column in the Appointment Book. You can remove a provider from your Appointment Book by highlighting the

provider and clicking on the **Delete**  button. To add a provider column into the Appointment Book, click on the **Add New Record**  button, select the relevant provider from the list and click the **Select** button.

Note: Only users that have been marked as "Show me in the Appointment Book" in their User Preferences window, or "In Appts" in the All User Preferences window will be displayed in this list to add to the Appointment Book.

Rooms

Rooms in Genie can relate to a Hospital or Day Surgery where the surgeon operates. Rooms can be selected when creating a procedure record for a patient.

Provider: Dr Miranda Lawson
Hospital: Mater Hospital ☐ **Notified**
Date: 28/08/2014

Alternatively, rooms in Genie can be used as a triage system allowing you to know which room a patient is waiting in to see the doctor. To rearrange the order of rooms, click and drag the room names in the list and put them in the order you require them. To add a room, click on the **Add a New Record** button, enter the relevant details for the room and click **Save**. To delete a Room, highlight the relevant room and click the **Delete** button.

The *Room* drop-down menu at the top of the Appointment Book allows you to assign a patient to a specific room.

You can assign a patient to a room by selecting their name from the Appointment Book, clicking on the *Room* drop-down menu and selecting the appropriate room.

Times	Appointment	Type	Room
08:30 AM	No Appointment		
08:45 AM	No Appointment		
09:00 AM	No Appointment		
09:15 AM	No Appointment		
09:30 AM	SMITH John 2	New Patient	
09:45 AM			
10:00 AM	\$ CHRISTIAN Greg 8	Followup	
10:15 AM	\$ EMERALD Barry 10	Followup	
10:30 AM	Followup		

The Room column in the Appointment Book allows you to quickly see which room a patient has been assigned to.

Times	Appointment	Confirmed	Notes	Type	Room
08:30 AM	No Appointments				
08:45 AM	No Appointments				
09:00 AM	No Appointments				
09:15 AM	No Appointments				
09:30 AM	SMITH John 2		DOB: 8/02/1951 MEMO: Appt 4/04/2014 DELETED	New Patient	Mater Hospital
09:45 AM					
10:00 AM	\$ CHRISTIAN Greg 8		DOB: 12/02/1930	Followup	
10:15 AM	\$ EMERALD Barry 10		DOB: 13/06/1983	Followup	
10:30 AM	Followup				

5.1.2 Using The Appointment Book

Moving Around

You can use **Tab**, the arrow keys, or mouse clicks to move to different appointment times. Alternatively, you can use **Page Up** and **Page Down** to scroll vertically.

To add notes to the *Notes* or *Name* fields, press **Enter** (on the numeric keypad) and this will bring up a text input box.

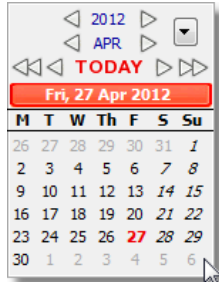
Pressing **Enter** again will confirm these additional notes, and pressing **Esc** will cancel these changes. An ellipsis (...) will appear in the patient's *Notes* column if a second line of text exists, the appointment only covers one line and the appointment text cannot extend beyond the appointment cell.

Times	Appointment	Type	Room
10:15 AM			
10:30 AM	LEE Crystal 3		
10:45 AM			
11:00 AM			
11:15 AM			

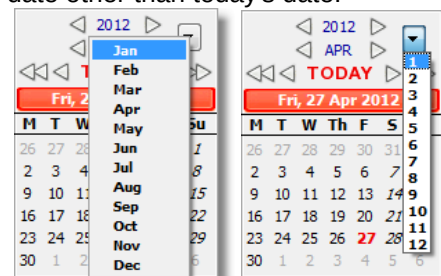
If you would like to copy these notes, or any other text in the Appointment Book fields, you are able to use copy (**Ctrl+C**) and paste (**Ctrl+V**) commands.

Button Description

Note: Each of these buttons will be described in more detail in subsequent sections.



The calendar allows you to skip forward and backward for both the year and the month. If you click on the month name, a drop-down list of all months will appear allowing you to jump to the required month. The arrows on either side of **TODAY** allow you to skip forward or backwards by either one day or one week respectively. The little arrow button in the calendar allows you to skip forward the selected number of weeks from today's date. Holding down **Alt** and clicking on this arrow will allow you to skip forward the required number of weeks from a date other than today's date.



 The **HELP** button opens up the Genie manual as a PDF document. **Alt+clicking** on this button will open the web-based Genie manual in your default internet browser.



Opens up the Appointment preferences window. See [Appointment Preferences](#).



Opens up the Referral/Reply letter window. See [Referral/Reply Letters](#).



Opens a New Patient window. See [Adding An Appointment](#).



Opens the Edit Patient window. See [Edit Patient](#).



Opens the Merged Letter Templates window. See [Merged Letter Templates](#).



Opens the Labels module. See [Labels](#).



Allows you to make an appointment for another family member, provided they have the same account holder in their demographic window. See [Account Holders](#).



Marks the patient as *In Waiting Room*.



Allows you to toggle the Names and Notes display in the Appointment Book. See [Appointment Views](#).



Used to create Repeating Patient Appointments. See [Repeating Appointments](#).



Opens the Procedure window. See [Procedures](#).



Opens the patient's Clinical Window. See [Clinical module](#).



Allows you delete patient and non-patient appointments.



Creates a 'quick invoice'. Prints an invoice for the item number selected from the drop-down list of commonly used items. See [Specifying a Fee to Charge](#).



Prints the Appointment Book. See [Printing Appointment Book](#).



Opens up the Invoice window. See [Creating an Invoice](#).



Allows you to Show or Hide Appointments. The colours will disappear when not displaying the appointments.



Allows you to Show or Hide the Appointment Schedule. The colours will disappear when not displaying the schedule. See [Appointment Scheduler](#).

The Show/Hide views determine what information appears in the Appointment Book.



Show Appointments
Hide Schedule

10:45 AM	
11:00 AM	
11:15 AM	\$ BROWN Ella 7
11:30 AM	
11:45 AM	
12:00 PM	
12:15 PM	



Show Appointments
Show Schedule

10:45 AM	
11:00 AM	Followup
11:15 AM	\$ BROWN Ella 7
11:30 AM	Followup
11:45 AM	Followup
12:00 PM	Followup
12:15 PM	



Hide Appointments
Show Schedule

10:45 AM	
11:00 AM	Followup
11:15 AM	
11:30 AM	
11:45 AM	
12:00 PM	
12:15 PM	



Opens the Recalls Due window. See [Recalls](#).



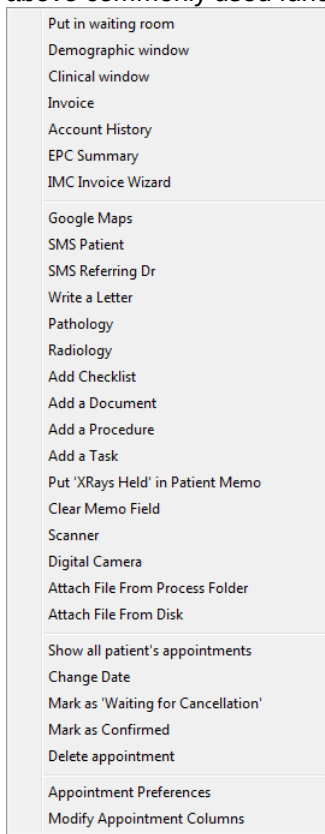
Opens the Patient Correspondence window. See [Reviewing Correspondence](#).

The box underneath the Appointment Book buttons is a text box allowing you to add notes.

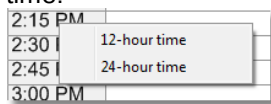
Dr Miranda Lawson has a meeting at 6pm.

Pressing **Tab**, or **Enter** (on the numerical keypad), or simply clicking away from the box will confirm the text entry made.

Right-clicking on a patient appointment will produce a drop-down menu (see below) which lists many of the above commonly used functions.



Right-clicking on the time column allows you to choose for the time column to display in either 12 or 24 hour time:



5.1.2.1 Appointment Views

There are four different ways of viewing the Appointment Book:



Select the view you would like by clicking on the appropriate icon.

With the exception of the List view, you can also choose to view the appointments for all the providers in a practice, or just the one provider by using the tabs across the top of the Appointment Book.



You can switch to different tabs by clicking on the appropriate tab, using the keyboard shortcuts (**Alt+Left arrow** or **Alt+Right arrow**) or the arrow keys in the All providers view.

Appointment Columns

When in the individual provider view, the following columns are available:

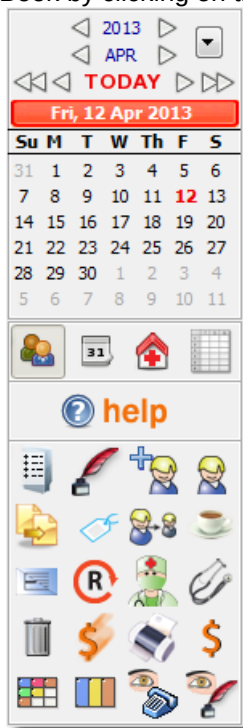
<i>Times:</i>	Times that appointments can be booked.
<i>Appointment:</i>	Name of the patient booked for the appointment.
<i>Confirmed:</i>	Displays whether a patient has been marked as confirmed for the appointment. Can be done by right-clicking on the patient's appointment and selecting 'Mark as Confirmed'. If you use Genie SMS Reminders , the patient's reply will be inserted here.
<i>Notes:</i>	Provides a free text area for information about the appointment, e.g. reason for the appointment. Certain demographic information can be added by default via options in Appointment Preferences .
<i>Chart:</i>	Displays the patient's chart number.
<i>Phone:</i>	Displays the patient's phone number depending on what has been recorded in their demographic window. The preference for which phone number to display by default can be set in Appts > Appt Preferences .
<i>Type:</i>	Displays the appointment type, e.g. New Patient.
<i>Acct Type:</i>	Displays the patient's account type, as selected in the patient's demographic window.
<i>Invoice:</i>	Displays what item is to be charged, or what fee has been charged.
<i>Arr:</i>	Time the patient was put into the waiting room.
<i>Wait:</i>	Displays how long the patient has been waiting (see Appointment Preferences for more information on how this is calculated).
<i>Room:</i>	Displays which hospital they are booked into for theatre, or which room they are currently in at the surgery, as specified in Appts > Edit Rooms .
<i>Created:</i>	Date the appointment was created.
<i>By:</i>	Displays which user originally created the appointment.

Toggling the View

When you are in a view that shows just the appointment names, you can quickly view the appointment notes by clicking the **Toggle Name/Notes**  icon. Clicking it again will hide the Notes.

Appointment Book Icons

The Appointment Book icons allow you to perform a number of functions directly from the Appointment Book. Please see [Using the Appointment Book](#) for more information about these functions. The icons are displayed at the far left hand side of the Genie Window by default. The icons can be moved to the top of the Appointment Book by clicking on the long date with the red background, e.g. 'Fri, 12 Apr 2013'



Adjusting Column Widths

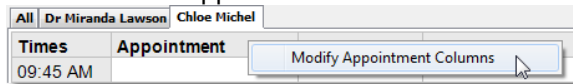
The slider at the bottom of the icons region on the left of the window is used to adjust various column sizes, depending on which view you are in.



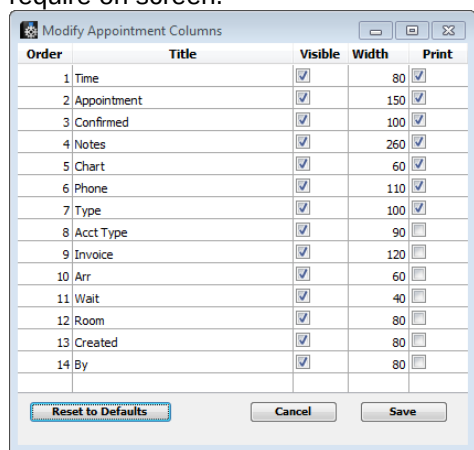
Providers View - All: Each provider's column is resized.

Dates and Rooms Views: Each date or room column is resized.

Providers/Grid View - Individual: The slider bar is not present because each column can be adjusted individually by using the *Modify Appointment Columns* option obtained by right-clicking on the column header directly, right-clicking on the Appointment Book and selecting *Modify Appointment Columns* from the drop-down menu or in the Appointment Preferences under the **Appearance** tab.



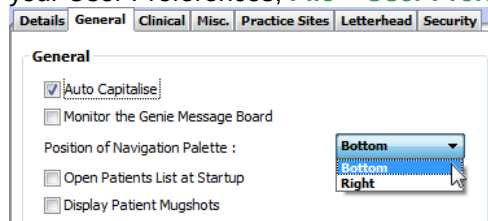
You can then type the width you require by slow double-clicking in the width column of the column that you would like to adjust. The measurement is in pixels, therefore trial and error must be used until you get the width you require on screen.



Note: These preferences are unique to each machine on the network.

Navigation Palette

You have the choice of having the navigation palette either at the bottom or at the right of your screen through your User Preferences, **File > User Preferences, General** tab.



This will keep track of all the windows you have open in Genie and alert you to any outstanding tasks, results etc.



5.1.2.2 Appointment Scheduler

The Appointment Scheduler is used to document a doctor's ongoing schedule e.g. a four-weekly rotating roster. The Appointment Scheduler can only be accessed if:

- Your security preferences allow you to *Modify Appointment Schedule*. For more information on security settings, please see the [Security](#) chapter.

- Your Appointment Book is set to *Hide Appointments* and *Show Scheduler*. Follow the steps below to set up each block of the schedule.



1. Select the type that applies to the block.

Type
Modify
Clear
Catch up
Followup
Lunch
New Patient
Not Available

2. Select the block of time by clicking and dragging within the Appointment Book.

12:45 PM	
01:00 PM	New Schedule - Followup
01:15 PM	
01:30 PM	
01:45 PM	
02:00 PM	
02:15 PM	
02:30 PM	

3. Complete the details in the Scheduler box that appears:

- Date/Times:** this defaults at the date and times you have clicked and dragged on, but can be changed if you have made a mistake.
- Duration:** this defaults at the duration you have clicked and dragged, this can be changed in this window.
- Provider:** the provider you have created the schedule for, this cannot be changed in this window.
- Repeating:** this will default on *Non-repeating*, you can change this depending on your needs.
- End date:** this does not have to be specified, but can be if you need a precise end date.
- Room:** usually only specified if this block will be used as a theatre list as this will enter the Hospital into the procedure record when booking patients and attaching a procedure.
- Type:** the type you have chosen prior to clicking and dragging.

More information on these options is found below.

27/04/2012	1:00 PM	2:30 PM	90	Chloe Michel
Followup				
Non-repeating		End date:	00/00/00	
Room		Type:	Followup	
		Cancel	Save	

4. Clicking **Save** will allocate the schedule to the Appointment Book.

Editing Appointment Schedule

To edit a schedule, you must have *Hide Appointments* and *Show Scheduler* modes enabled. Right-click on the schedule that you have created, and you will be presented with the options to either *Edit Appointment schedule* or *Delete appointment schedule*.



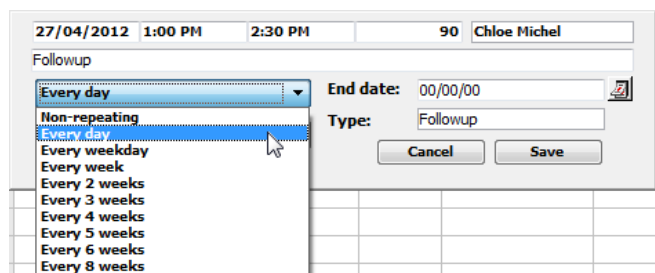
12:45 PM	
01:00 PM	Followup
01:15 PM	
01:30 PM	
01:45 PM	
02:00 PM	
02:15 PM	
02:30 PM	

Edit appointment schedule
Delete appointment schedule

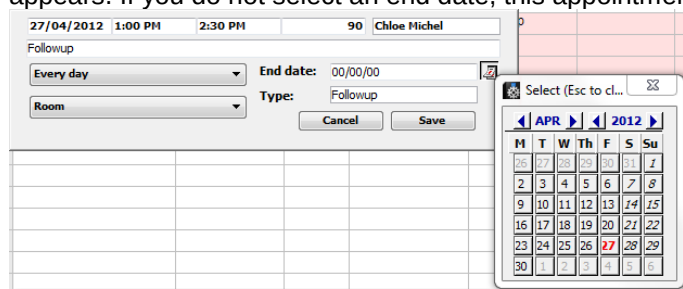
Note: Where a provider has a one-off change to their schedule (eg. a conference), you should make this change using appointment types (see [Appointment Types](#).) You cannot put a schedule over another schedule.

Repeating Appointment Schedules

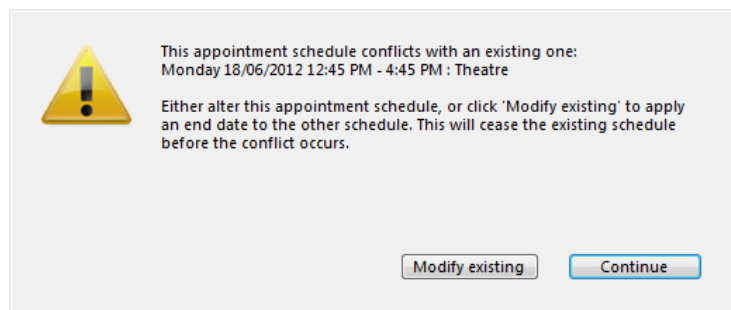
To make an appointment schedule repeat for a specific period of time, click on the *Non-repeating* drop-down menu in the Scheduler box when you are creating the schedule, or right-click on the schedule block and select *Edit Appointment Schedule*.



Once you have selected the appropriate option, the *End date* field will become available. You can either type in an end date for the schedule or click on the Calendar  button and select a date from the calendar that appears. If you do not select an end date, this appointment schedule will repeat indefinitely.



If the schedule you are creating conflicts with an existing schedule, you will get the following alert window:



In this example, the schedule you are creating conflicts with the theatre schedule on Monday. You have the option to either:

- *Modify existing*: allows you to overwrite the existing schedule (theatre in this example) with the new schedule that you are creating.
- *Continue*: allows you to alter the schedule you are currently creating and leaves the existing schedule as it was.

One-off Changes to a Repeating Schedule

On occasion, you may need to make a one-off change to your repeating schedule. The best way to make a one-off change to a repeating schedule is to apply an appointment type over the schedule.

In the example below, the doctor usually breaks for lunch at 12PM.

11:00 AM	Antenatal	
11:15 AM	Antenatal	
11:30 AM	Antenatal	
11:45 AM	Antenatal	
12:00 PM	Lunch	
12:15 PM	Lunch	
12:30 PM	Lunch	
12:45 PM	Lunch	
01:00 PM	Theatre	
01:15 PM	Theatre	
01:30 PM	Theatre	
01:45 PM	Theatre	

If the doctor needs to work through lunch and start theatre early one day, highlight all of the lunch cells and select *Theatre* from the *Type* drop-down menu at the top of the appointment book.

11:00 AM	Antenatal	
11:15 AM	Antenatal	
11:30 AM	Antenatal	
11:45 AM	Antenatal	
12:00 PM	Theatre	
12:15 PM	Theatre	
12:30 PM	Theatre	
12:45 PM	Theatre	
01:00 PM	Theatre	
01:15 PM	Theatre	
01:30 PM	Theatre	
01:45 PM	Theatre	

Using this method avoids modifying future instances of the schedule.

5.1.2.3 Adding An Appointment

There are two ways to book a patient appointment:

1. For a single appointment, simply click on the cell at the time you would like to book the appointment, and start typing a few letters of the patient's surname.
2. For a longer appointment, simply click and hold the mouse in the cell where you would like to start the appointment and drag down to highlight all cells required for the appointment. Start typing a few letters of the patient's surname.

When you start typing a box will appear over the appointment time. You can search for a particular patient in your database by including a few letters of their surname and their first name. This can be done in two ways:

- Enter a space after the first few letters of the surname and then type the first few letters of the patient's First name. Eg. "smi jo " to search for John Smith.
- Enter a comma after the first few letters of the surname and then type the first few letters of the patient's First name. Eg. 'smi,jo' to search for John Smith.

The screenshot shows a window for adding an appointment. At the top, it displays the date '27/04/2012', start time '11:15 AM', end time '11:30 AM', duration '15', and provider 'Dr Miranda Lawson'. Below this is a search box containing the text 'Smi' and a dropdown menu labeled 'Type'.

This window also allows you to change the date, start and finish time and duration of the appointment as well as the appointment type, if required. It also displays the provider that this appointment is for.

Pressing **Tab** or **Enter** will bring up a window with a list of patients that match your search for you to select from.

Select a Patient

⌵

Inactive	Surname	First Name	Known As	Chart	DOB	Address
☒	SMITH	John		2	08/02/1951	12 Chisholms Road
☐						
☐						
☐						
☐						
☐						
☐						
☐						
☐						
☐						
☐						
☐						
☐						
☐						
☐						

New Patient Cancel Select

If the patient does not have a record in Genie, you can click on the **New Patient** button to create a new record of them. You can also create a new patient record from the Appointment Book by selecting the cell you have typed

their name into and either going to **Appt > New Patient**, or clicking on the **Add a New Patient**  icon from the Appointment Book.

A new patient record will be created with the Surname and First name as entered into the appointment cell. Fill in the details you have, **Save** the record, and the appointment cell will be updated accordingly. At minimum, you require the patient's surname to create a patient record; all other details can be entered when the patient arrives at the practice.

New Patient

Patient ID: 93 Record created on 27/04/2012 by Dr Miranda Lawson External ID:

Title:	Address 1:	DOB:	00/00/00	Age:	0	Accuracy:
First Name:	Joan	Address 2:		Gender:		Chart: 26
Surname:	Smith	Suburb:		Home Phone:		
Middle Name:		State:		Work Phone:		
Known as:		Country:	Australia	Mobile:		☐ No SMS
Maiden Name:		☐ This is a Temporary Address		Email:		

Main Secondary

☒ Lock clinical record

Account Type: Private

Account Holder: ☐ Self ☐ Other

Balance: \$0.00 ☐ Pays Gap Only

IHI No: Get IHI

Medicare No: Ref: 0

Medicare Expiry: 00/00/00 Swipe

Private Fund: UPE: 0

Membership No:

DVA No:

DVA Disability:

DVA Card Colour: Select...

HCC/Pension No:

Expiry: 00/00/00

Referrals:

Referring Dr	Date	Duration	Valid
Select...			

Usual GP: ☐ Usual GP

Interested Parties:

Usual Provider:

Referral Source: Referrals 0

Marital Status:

☐ Diabetic ☐ Inactive ☐ Deceased

Memo:

Verify Online Update Family Next Recall Notes Cancel Save

Running in Test Mode - Transmission Type D

If Genie cannot find a matching patient record, what you have typed will remain in the cell and be coloured brown signifying a non-patient appointment.

12:00 PM			
12:15 PM	Smy Jo		
12:30 PM			

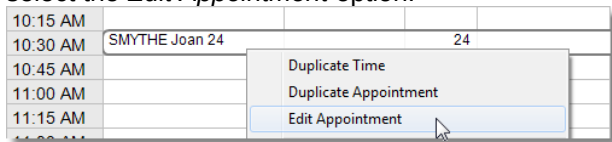
If this is meant to be a non-patient appointment, such as 'Breakfast Meeting', this is fine.

If you are sure that the patient does indeed have a record, either you have spelt their name incorrectly, or their name has been entered into the database incorrectly. A common mistake is to have entered the first name into the *Surname* field and vice versa. You could also try running the search again using fewer letters.

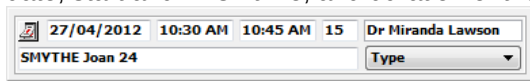
If you don't want to create a record for them at this stage because they are a new patient and may not actually turn up, leave the appointment as is. You can use it later to create the patient record when they arrive.

5.1.2.4 Editing An Appointment

To edit an existing appointment, click on the appointment and press **Enter** on your numeric pad or right-click and select the *Edit Appointment* option.



The following window will appear allowing you to edit the appointment. This window allows you to change the date, start and finish time, and duration of the appointment, as well as the appointment type.



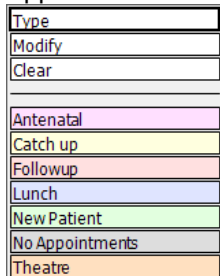
Pressing **Enter** or **Tab** will save the appointment to the Appointment Book.

5.1.2.5 Appointment Types

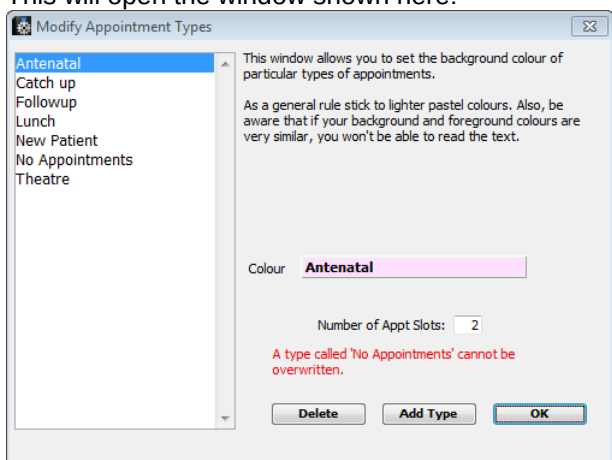
Appointment types can be used to change the background colour of an appointment to distinguish it at a glance from other appointments. Commonly used types include: *New Patient*, *Follow Up*, *Post Op*, etc.

To Set-Up

You can add, delete, and modify different types by selecting *Modify* in the *Type* drop-down menu at the top of the Appointment Book.

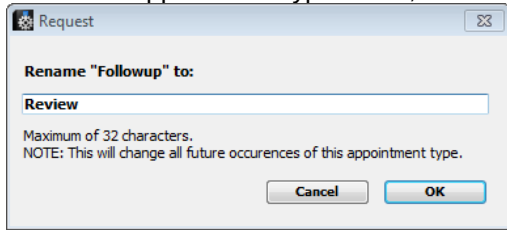


This will open the window shown here:



Use the **Delete** and **Add Type** buttons to delete or add a new type.

To edit an appointment type name, double-click on it in the list and you will be presented with a Rename prompt.

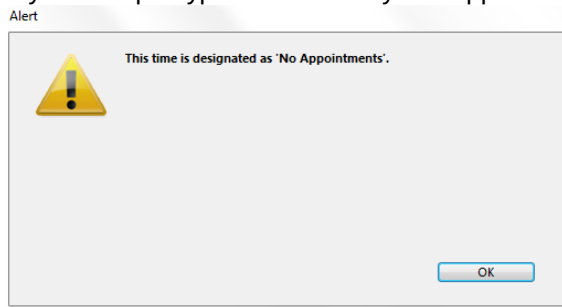


Note: Renaming a type will do so for all past and future occurrences of the type.

To set the background colour for a type, select it from the list on the left-hand side and click on its name next to the word Colour. This will open a colour grid where you can select any colour you wish. It is sensible to keep your colours light, and quite distinct from the colours of your patient statuses; if you have a background colour similar to your patient status, your text will be very hard to read.

You can specify how many appointment slots a particular type uses when it is applied to a patient appointment by typing in the *Number of Appt Slots* box. e.g. New Patient appointments take two slots. This will not prevent users from manually adjusting these appointments to less than the minimum two slots, but it will ensure Genie defaults to two slots.

If you set up a type called exactly 'No Appointments', patients will not be able to be booked over this type.



If you create a type called exactly 'Antenatal', and apply it to a patient appointment, the gestation displays in the appointment cell provided the patient has a pregnancy record in their Clinical Window.

All Dr Miranda Lawson Chloe Michel					
Times	Appointment	Confirmed	Chart	Phone	Type
09:45 AM	\$ BROWN Ella 7 (30+5)		7		Antenatal
10:00 AM	Antenatal				

Using Types

Once you have set up your types there are two ways to use them

1. To organise your patients
2. To make temporary adjustments to the Appointment Schedule

1. To Organise your Patients

You can organise your patients using types to allow you to see which Patients are New, for Follow-up, etc. The Appointment Book will display the appointments using the assigned colours for the different types.

Times	Appointment	Confirmed	Notes	Chart	Phone	Type
09:45 AM	CHRISTIAN Greg 8		DOB:12/02/1930 REF:Dr John Cadden	8		Followup
10:00 AM	NORMAN Susi 18		DOB:02/03/1993 REF:Dr Vasantha Naicker	18		Followup
10:15 AM	MARCH Glenda 17		DOB:15/12/1990 REF:Dr Suzie Ma (05/04/2012)	17		New Patient
10:30 AM						
10:45 AM	GRISSHOLM Gerald 12		DOB:15/06/1950 REF:Dr Damian GAFFNEY	12		Followup
11:00 AM	EMERALD Barry 10		DOB:13/06/1983 REF:Dr Clive EAKIN	10		Followup
11:15 AM	LEE Vincent 4		DOB:02/06/1983 REF:Dr Greg Norman (05/04/2012)	4		New Patient
11:30 AM						
11:45 AM	\$ BROWN Ella 7 (30+6)		DOB:20/07/1982 REF:Dr Julie Baartz (05/04/2012)	7		Antenatal
12:00 PM						
12:15 PM	PEARSON Nadia 20		DOB:26/06/1973 REF:Dr Rakesh Padarath (05/04/2012)	20		Followup
12:30 PM	Lunch					
12:45 PM	Lunch					
01:00 PM	Lunch					
01:15 PM	Lunch					
01:30 PM	FRANKLIN Amanda 11		DOB:23/04/1975 REF:Dr Clifford Fairley (05/04/2012)	11		Theatre
01:45 PM	Theatre					
02:00 PM	Theatre					
02:15 PM	Theatre					
02:30 PM	Theatre					
02:45 PM	Theatre					

To allocate a type to a patient appointment, highlight the required appointment, and select the type from the Type drop-down menu.

Type	Room
Modify	Dr Michel
Clear	nt
Antenatal Catch up Followup Lunch New Patient No Appointments Theatre	
11:30 AM	
11:45 AM	
12:00 PM	GRISSHOLM Gerald 12
12:15 PM	

This will apply this type's designated duration and change the background colour of the appointment. The duration of the appointment will only be extended if the type's default duration is longer than the appointment; it will not reduce the duration if the appointment is longer than the type.

11:45 AM		
12:00 PM	GRISSHOLM Gerald 12	New Patient
12:15 PM		
12:30 PM		

If you highlight multiple cells and apply a type, the cells will be grouped together and the duration of the appointment will be extended to cover the highlighted cells. The appointment will only be for the duration of the cells selected even if the number of slots for this type is longer than what cells are selected.

11:45 AM			11:45 AM		
12:00 PM	GRISSHOLM Gerald 12		12:00 PM	GRISSHOLM Gerald 12	Followup
12:15 PM			12:15 PM		
12:30 PM			12:30 PM		
12:45 PM			12:45 PM		

If you would like to change the duration for this particular appointment after you've typed the appointment, you can edit this in the same way you would edit an appointment schedule.

Right-click on the appointment, select *Edit Appointment* and either type the required times in the Start and End time fields or type the number of minutes in the field next the End time.

07/05/2012	12:00 PM	12:45 PM	45	Dr Miranda Lawson
GRISSHOLM Gerald 12			Followup	

Highlighting a typed appointment and clicking on the Clear option in the drop-down menu will remove the type from that patient's appointment. However, if the appointment was spread across several appointment slots, it will keep the same duration and you must adjust this accordingly.

Type
Modify
Clear
Antenatal
Catch up
Followup
Lunch
New Patient
No Appointments
Theatre

2. To Make Temporary Changes to the Appointment Schedule

Types can also be used to mark changes to the doctor's schedule. It is most commonly used in instances where there is a change to the doctor's usual Schedule (eg. *Holidays* or one-off *Theatre* sessions). See [Appointment Scheduler](#) for setting up the Appointment Book to display the doctor's usual schedule.

Example: The doctor has agreed to operate on a particular Monday from 1pm to 5pm where he usually has No Appointments. Highlight the cells from 1pm to 5pm (Figure 1) and select the type you have set up from the type menu, e.g Theatre (Figure 2). This will change the colour of these cells and patients can now be booked in these time slots.

01:00 PM	No Appointments
01:15 PM	No Appointments
01:30 PM	No Appointments
01:45 PM	No Appointments
02:00 PM	No Appointments
02:15 PM	No Appointments
02:30 PM	No Appointments
02:45 PM	No Appointments
03:00 PM	No Appointments
03:15 PM	No Appointments
03:30 PM	No Appointments
03:45 PM	No Appointments
04:00 PM	No Appointments
04:15 PM	No Appointments
04:30 PM	No Appointments
04:45 PM	No Appointments

Figure 1

01:00 PM	Theatre
01:15 PM	No Appointments
01:30 PM	No Appointments
01:45 PM	No Appointments
02:00 PM	MARCH Glenda 17
02:15 PM	No Appointments
02:30 PM	No Appointments
02:45 PM	No Appointments
03:00 PM	Theatre
03:15 PM	No Appointments
03:30 PM	No Appointments
03:45 PM	No Appointments
04:00 PM	Theatre
04:15 PM	No Appointments
04:30 PM	No Appointments
04:45 PM	No Appointments

Figure 2

If this is a temporary change to doctor's schedule that repeats (eg.the doctor has agreed to operate over the next three Mondays), this change can be set to repeat (see [Repeating Appointments](#)).

Appointment Type Report

An Appointment Type report can be generated through **Appts > Appts Type Report**. This report will show how many patients of each type have been booked in a given time period and for a specific provider.

It can also report on non-patient appointment types by clicking on the **Non-Patient Appointments** tab.

Reason	Number
Unspecified	4
Antenatal	2
Catch up	1
Consultation	2
Followup	13
New Patient	14
Not Available	1
Theatre	3
Total	40

5.1.2.6 Appointment Status

Appointments can be marked as having a particular status to indicate the patient's progress through the practice. This status is reflected in the colour of the text of the appointment.

ADAMS Bryan "Patch" 6	BROWN Ella 7	CHRISTIAN Greg 8
Patient Appointment	Non-Patient Appointment	In Waiting Room
DREW Miriam 9	EMERALD Barry 10	FRANKLIN Amanda 11
Ready to Invoice	Invoiced	File Out
GRISSHOLM Gerald 12	HEATHE Rose 13	
Waiting for Cancellation	In With Doctor	

For example the default colour for a patient appointment is black, a non-patient appointment is brown. When the patient is added to the Waiting Room by clicking on the **Coffee Cup** icon, the status is automatically changed to red for *In Waiting Room*. You can quickly check what each colour represents by clicking on the *Status* drop-down menu. To manually change the Status of an appointment simply select the status from the *Status* drop-down menu.

Status

- Modify...
- Patient Appointment
- Non-Patient Appointment
- In Waiting Room
- Ready To Invoice
- Invoiced
- File Out
- Waiting for Cancellation
- In With Doctor

The eight status items which are installed with Genie are used by the program for various tasks, and therefore cannot be deleted.

You can modify the original eight statuses' colours, and add or delete any new items you wish by selecting *Modify* in the Status drop-down menu. This window behaves in the same way as the Appointment Type window (see [Appointment Types](#)).

Note: If you double-click on a patient that has a status of *Ready to Invoice* it will open an invoice for the patients. If you double-click on a patient that has a status of *In Waiting Room* it will open the patient's Clinical Window. Double-clicking on a *'Non-Patient Appointment'* will allow you to edit the appointment. Double-clicking on all other appointment statuses will open the patient's demographic window.

5.1.2.7 Edit Patient

The Edit Patient window can be accessed from the following places in Genie:

- The Appointment Book
- The Patient Clinical Window
- The Patients List

To bring up the Edit Patient window, click once on the desired entry and then click on the small **Edit Patient** icon



The Edit Patient window allows you to make any required changes and adjustments to the patient's demographic details.

The **Envelope** button  next to the patient's address and the account holder details allows you to print an envelope displaying the patient's or the account holder's address respectively. Additionally you can also choose to include a return address on these envelopes.

The  symbol allows you to locate the address on Google Maps in your default internet browser.

The **Email** button  allows you to enter the patient's email address. This allows you to then email this patient.

The *Lock clinical record* padlock allows a record to be locked for use by one provider only. Access to the locked patient's file will require the password of the user who locked the record initially. A record is locked or unlocked by clicking on the picture of the lock.

The *Account Type* governs what fees are charged by default when invoicing this patient.

An account holder record must be created in order to invoice a patient by clicking either the **Self** or **Other** radio button (see [Account Holders](#)). This must be an individual; it cannot be an organisation. The account holder can be changed at the time of invoicing to be that of an organisation or Medicare etc.

The **Swipe** button can be used in conjunction with a card reader to enter a patient's Medicare details. Click on the button then swipe the card and it will enter the patient's Medicare Number and Expiry Date. It can also be used in the Appointment Book, click into an appointment cell, then swipe the card and this will make an appointment for this patient.

Referral details can be added by clicking on the small **Blue plus** button next to the *Referring Dr* table which displays a search box for the Address Book. The doctor must have a record in your Address Book to be added as a referring doctor (see the Address Book section). The Referring doctor address details can be edited via the

small **Doctor** icon , and the referring doctor can be deleted via the **Garbage can** icon .

To edit or change the Referral period, double-click on the Referring doctor's name in the *Referring Dr* column.

New Referral

Referrals ☒ **Current**

Referrer : **Dr Helen HEALY**

Provider No : 04742888

Date Issued : 04/05/2012

Date Started : 04/05/2012

Duration : 12 *Enter '99' for indefinite referrals*

Expiry Date : 03/05/2013

Referred To: *optional*

The **Usual GP** button allows you to add in the doctor the patient usually sees as their GP, if it is different to their referring doctor. The doctor must have a record in your address book to be added as a usual GP (see the [Address Book](#) section). To remove a doctor as a usual GP, **Alt+click** the **Select...** button.

The **Interested Parties** button  allows you to view the interested parties for this patient. You can add or delete doctors that are records in your address book to this list.

The *Usual Provider* is the provider that the patient usually sees at your practice. This can be useful for generating reports for specific providers' patients.

Referral Source can be used for statistics on what advertising media has worked the best (eg. Radio, Yellow Pages, Magazine Ad etc) using the Referral Source Report in **File > Maintenance & Reports, Practice Analysis** tab. If you mark the *Referral Source* as *Existing Patient*, you will be prompted to choose which patient in your database referred this patient. This will then keep a tally in the referring patient's demographic window of the number of patients they have referred.

Making a patient as *Inactive* or *Deceased* will prevent them from appearing in most searches and will prevent merged letters from being printed for the patient. The *Deceased* marker will also prevent you from booking appointments for that patient.

The *Memo* field allows for brief entries, such as patient reminders like 'Collect Xrays'. Such reminders will then appear in a red Memo box the next time the patient is booked in for an appointment, or the next time they are marked as *In Waiting Room*. The length of time that this memo is displayed for can be adjusted in your User Preferences in the **General** tab.

Verify Online will be available if you use Online Claiming. It verifies the patient information you have in Genie with that held at Medicare Australia, and will let you know if there is any differing information. This helps prevent patient information-based rejections in Online Claiming. See [Using Online Verification](#) for more information.

The **Update Family** button allows you to automatically update the demographic details (i.e. home address and home phone number) of all patients that share the same Account ID number ie. by the parent having **Self** selected in their account holder box and all others in the family having **Other** selected with the parent being the account holder.

The **Notes** button allows you to make extended, progressive notes on the patient, if required. These are stored in the patient's Clinical Window as a Document. If a patient has a Primary Note entered, the **Notes** button will display in red text with an asterisks (Windows) or just *Notes (Macs).

The Secondary Tab

Edit Patient Patient ID: 157 Record created on 13/08/2015 by Dr Miranda Lawson External ID:

Title: Miss **Address 1:** 122 Stanely Tce **DOB:** 25/09/1987 **Age:** 28 **Accuracy:**

First Name: Cecilia **Address 2:** **Gender:** F **Chart:**

Surname: CLINTON **Suburb:** TARINGA **Home Phone:**

Middle Name: J **State:** QLD 4068 **Work Phone:**

Known as: **Country:** Australia **Mobile:** 0402111444 **No SMS:** ☐

Maiden Name: **This is a Temporary Address:** ☐ **Email:**

Main **Secondary**

Indigenous Status: ☐ Aboriginal origin ☐ TSI origin
☐ Neither
☐ Registered for CTG PBS Co-payment Relief

Country of Birth: **Primary Language:**
Occupation:
Alias First Name:
Alias Surname:
UR No:
Custom:
Ethnicity:
NoK/Emergency/Family:

Relationship	Name	Phone
Father	Rohan Clinton	1112122222
Partner	Andy Marks	111111111111

Claims

Insurer:
Address:
Claim No:
Student ID:
Faculty:
Fee Type:
Graduate Status:

Verify Online **Update Family** **Next Recall** **Notes** **Cancel** **Save**

Running in Test Mode - Transmission Type D

The **Secondary** tab is where you can enter the patient's indigenous status, country of birth, primary language, partner & next of kin details, and information such as hospital UR number and student details (used by university medical service sites).

The *Alias* fields (*Alias First Name* and *Alias Surname*) are used for ECLIPSE health fund claiming when a patient's name is registered differently with their private health fund to Medicare.

This is also where you can enter Workcover claim information and certificates by clicking on the **Claim** button. For more information on invoicing Workcover claims or adding certificates, see [Invoicing Workcover](#) and [Add Workcover Claim](#) respectively.

Conversion Ratios Tab

Note: This function is available if your practice type (**File > Set Practice Type**) is set to Plastic Surgery.

The **Conversion Ratios** tab allows you to track the number of patients who call to enquire about a procedure, the percentage who progress to a consultation with a provider, and the percentage who subsequently proceed to have the procedure performed. Further information is available in the [Procedures](#) section.

Edit Patient X

Patient ID: 50 Record created on 05/04/2012 by Dr Miranda Lawson External ID:

Title: Mrs	Address 1: 5 Merigold Street	DOB: 27/01/1981	Age: 31 Accuracy
First Name: Rose	Address 2:	Gender: F	Chart: 13
Surname: HEATHE	Suburb: TARINGA	Home Phone:	
Middle Name:	State: QLD 4068	Work Phone:	
Known as:	Country: Australia	Mobile: 0402632092	☐ No SMS
Maiden Name:	☐ This is a Temporary Address	Email: roseheathe@gmail.com	

Main **Secondary** **Conversion Ratios**

1st Contact Date/Staff: 11/05/2012 Dr Miranda Lawson

Referral Source:

Doctor Consult: P 00/00/00

Procedure Date: P 00/00/00 0

Procedure:

☐ Procedure Performed

1st Contact	Planned Procedure
11/05/2012	

Running in Test Mode - Transmission Type: D

Verify Online Update Family Next Recall Notes Cancel Save

5.1.2.8 Moving/Copying Appointments

Moving Appointments

Appointments can be moved to a different cell on the page by selecting the appointment that you would like to move, holding down **Alt**, and clicking and dragging the appointment up or down. Releasing the mouse button will place the appointment in the slot that you have moved it to.

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20%;">11:30 AM</td><td style="width: 80%;"></td></tr> <tr><td>11:45 AM</td><td></td></tr> <tr><td>12:00 PM</td><td></td></tr> <tr style="background-color: #f0f0f0;"><td>12:15 PM</td><td>HEATHE Rose 13</td></tr> <tr><td>12:30 PM</td><td></td></tr> </table>	11:30 AM		11:45 AM		12:00 PM		12:15 PM	HEATHE Rose 13	12:30 PM		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20%;">11:30 AM</td><td style="width: 80%;"></td></tr> <tr style="background-color: #f0f0f0;"><td>11:45 AM</td><td>HEATHE Rose 13</td></tr> <tr><td>12:00 PM</td><td></td></tr> <tr><td>12:15 PM</td><td></td></tr> <tr><td>12:30 PM</td><td></td></tr> </table>	11:30 AM		11:45 AM	HEATHE Rose 13	12:00 PM		12:15 PM		12:30 PM	
11:30 AM																					
11:45 AM																					
12:00 PM																					
12:15 PM	HEATHE Rose 13																				
12:30 PM																					
11:30 AM																					
11:45 AM	HEATHE Rose 13																				
12:00 PM																					
12:15 PM																					
12:30 PM																					

Appointments can also be moved to a different date by selecting the appointment and the going to **Appts > Change Date**, or right-clicking on the appointment and selecting *Change Date*.

This will open the window below allowing you to change the appointment to another Provider, Date, and/or Time.

Change Appointment

Name: HEATHE Rose 13

Dr Miranda Lawson

Date: Friday 04/05/2012

Time: 11:45 AM

Click in an appointment slot in the area on the right to change the appointment time.

Times	Name
9:45 AM	
10:00 AM	
10:15 AM	
10:30 AM	
10:45 AM	
11:00 AM	
11:15 AM	
11:30 AM	
11:45 AM	HEATHE Rose 13
12:00 PM	
12:15 PM	
12:30 PM	
12:45 PM	
1:00 PM	
1:15 PM	
1:30 PM	

☐ Keep Original Appointment Type

Cancel OK

Copying appointments

Appointments can be copied and pasted into another cell, either on the same day or on another day. To do this, you can use the keyboard shortcuts for copying and pasting i.e. **Ctrl+C** and **Ctrl+V** respectively.

Note: Attached procedures will not be copied if you use this method. If the appointment has an attached procedure, you MUST use the Change Date function described above.

5.1.2.9 Deleting/Restoring Appointments

Deleting Appointments

Highlight the appointment or appointments to delete and then either click on the **Garbage can** icon , press **Delete** on your keyboard or **Ctrl+D**.

Delete 1 appointment?

Action

☒ Just delete it

☐ Did Not Arrive

☐ Cancelled by Patient

☒ Keep Type

☐ Make a consultation note

☐ Record in patient memo

Cancel Delete

If the appointment is linked to a patient, you will be asked to confirm the deletion from the Appointment Book or mark the appointment as *Did Not Arrive* or *Cancelled by Patient*. Ticking either of these options will allow you to create a consultation note in the patient's Clinical Window and/or insert a patient memo for future reference. These *Did Not Arrive* and *Cancelled by Patient* options will not delete the patient's appointment from the Appointment Book, so a further deletion using *Just Delete it* is necessary, if required. If you tick *Just Delete it* and *Make a consultation note*, this will delete the appointment from the Appointment Book as well as make a consultation note in the patient's Clinical Window.

Delete 1 appointment?

Action

☐ Just delete it

☒ Did Not Arrive

☐ Cancelled by Patient

☒ Make a consultation note

☒ Record in patient memo

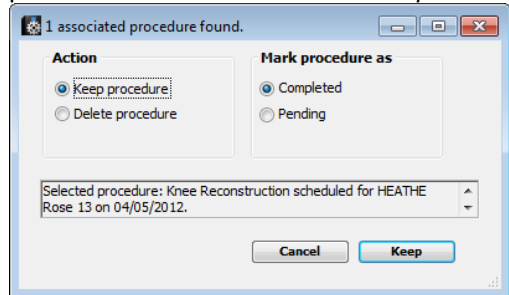
DID NOT ARRIVE

Cancel OK

Ticking *Keep Type* allows you to delete the appointment without deleting the appointment type.

Note: Non-patient appointments are deleted after a simple prompt asking if you would like to delete the selected appointment.

If a procedure is linked to the appointment, you will be given a choice of deleting the procedure altogether, or keeping a record of it in the patient's Clinical Window. If you keep the procedure, you will be able to select if the procedure is to be marked as *Completed* or *Pending*.

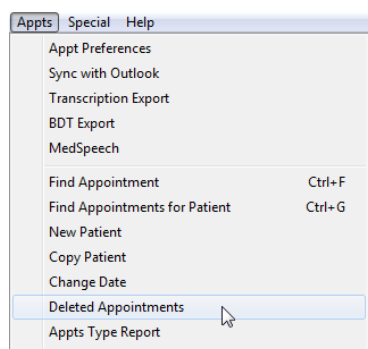


Note: When deleting multiple patients from within the Appointment Book, the same window will appear but it will state at the top of the window 'Delete X appointments?'.

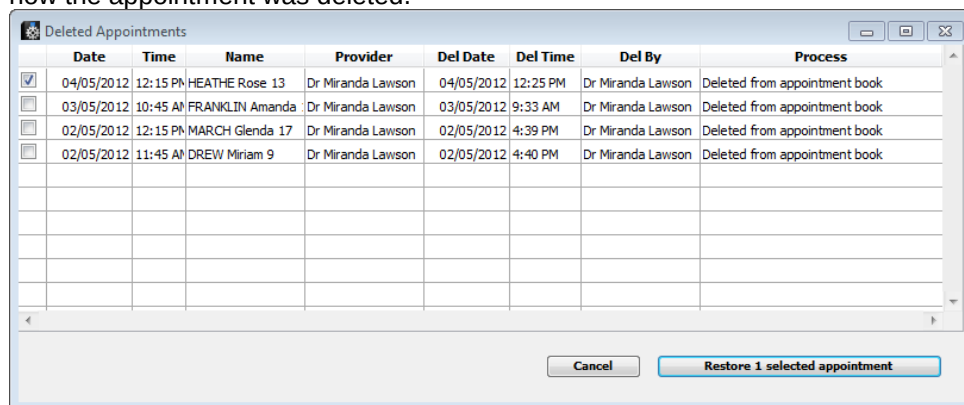
Restoring Deleted Appointments

Deleted patient appointments are held in the system for fourteen days and can be 'undeleted' by going to **Appts > Deleted Appointments**.

Note: If you do not clear out your appointments, these will not be cleared out every fourteen days; they will be kept indefinitely.



This will open up a window that will display all the appointments deleted in the last fourteen days, as well as displaying the name of the user who deleted this appointment, the time that the appointment was deleted, and how the appointment was deleted.



Select the appointment(s) you would like to restore by ticking the box and then click **Restore X selected appointment(s)**. This will re-insert the appointment(s) back into their original time slot.

Note: If there is already another appointment in this time slot, the appointments will be double booked.

5.1.2.10 Cancellation List

The cancellation list allows you to place patients who request an appointment with a specific doctor, but are unable to get an appointment straight away, on a list.

To place patients on the cancellation list, firstly go into **Appts > Appointment Preferences** and make sure that you have *Check for Cancellations when Deleting* ticked.

Appointment Checking

- ☒ Check for Double Appointments
- ☒ Check for Future Appointments from:
 - ☐ Current Date
 - ☒ Date of New Appointment
- ☒ Check for Cancellations When Deleting

To Use Waiting for Cancellation

1. When a patient phones for an appointment, and can't get one on the required day, book them in for a future appointment.
2. Make this patient's appointment Status 'Waiting for Cancellation' by clicking on the Status drop-down menu.

Status

Modify...

- Patient Appointment
- Non-Patient Appointment
- In Waiting Room
- Ready To Invoice
- Invoiced
- File Out
- Waiting for Cancellation
- In With Doctor

3. The next time you delete a patient appointment you will be provided with the following window:

These patients are waiting for a cancellation

Type: All Types

Date	Name	Type	Notes
04/05/2012	EMERALD Barry 10		DOB: 13/06/1983 REF: Dr Clive EAKIN(13)

CONTACT DETAILS

Home Phone
Work Phone
Mobile

☐ Keep This Appointment Also

Cancel Insert

4. Select the patient from the above list that you would like to book into the freed appointment slot and click **OK**.
5. This will insert the selected patient into the nominated appointment slot.

You can sort the list of patients waiting for a cancellation by clicking the *Type* drop-down menu. This will display all patients on the waiting list with the selected type applied to their appointment.

To view the cancellation list at any time, go to **Appts > Waiting for Cancellation**. From this window you can delete any future appointments by clicking on the **Delete Future Appts** button, show the patients in the patients list by clicking on the **Show in Patients List** button, and print this list this list by clicking on the **Print** button.

To remove a patient from the Cancellation List, double-click the patient's name in the list. Genie will take you to the patient's currently-booked appointment. Change the status of the appointment back to 'Patient Appointment' to ensure that they no longer appear in the Cancellation List.

5.1.2.11 Finding an Appointment

Pressing **Ctrl+F** will allow you to search for a specific patient, and locate all of their past and future appointments.

The 'Search Appointments' dialog box is shown on the left, with fields for Surname, First Name, Notes, Chart or NHS, and DOB. The 'Appointments Found' window on the right displays 2 appointments found for the patient MARCH Glenda 17.

Date	Time	Type	Provider	Name	Notes
03/05/2012	2:00 PM	Theatre	Dr Miranda Lawson	MARCH Glenda 17	DOB: 15/12/1990 REF: Dr Suzie Ma(05/04/2012)
02/05/2012	10:15 AM	Followup	Dr Miranda Lawson	MARCH Glenda 17	DOB: 15/12/1990 REF: Dr Suzie Ma(05/04/2012)

Below the table is a 'CONTACT DETAILS' section with fields for Home Phone, Work Phone, and Mobile. At the bottom are buttons for 'Delete Future Appts', 'Show in Patient List', 'Print', 'Cancel', and 'OK'.

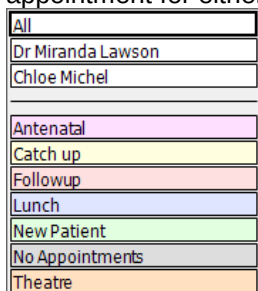
Pressing **Ctrl+G** will search for past and future appointments for the selected patient in the Appointment Book. You can also get to this window by right-clicking on the patient's appointment and selecting *Show All Patient's Appointments*.

This is a useful feature if you would like to find out if a particular patient has an upcoming appointment to see a doctor, or to see when they last had an appointment. If the patient is a new patient who is yet to be entered into the database (ie. has a non-patient appointment in brown text), you can still search this by entering the name in the *Notes* field of the search box.

Clicking the **Print** button will give you the option to print just the future appointments for the patient and/or just a certain type of appointment. In the below example it would print all future *Followup* appointments for the patient.

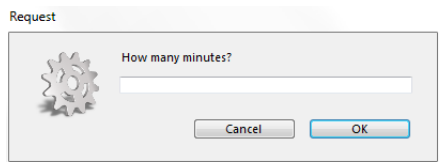
The print options dialog box shows two radio buttons: 'Print All' and 'Print Future Appointments' (selected). Below is a list of 'Appointment Types' with checkboxes: 'Followup' (checked) and 'Theatre' (unchecked). At the bottom are 'Cancel' and 'Print' buttons.

Using the **Next...** button at the top of the Appointment Book will allow you to search for the next available appointment for either a specific doctor, or a specific type of appointment.

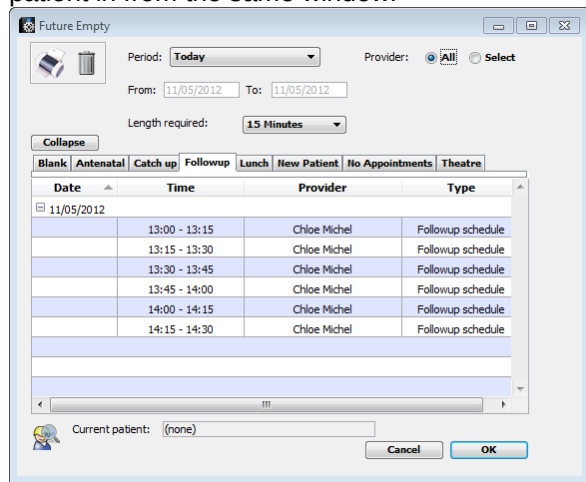


Note: When accessed from the **All Providers** view, selecting a type will show the next available appointment of that type with any doctor. If you would like to search for a particular type with a particular doctor, ensure you access this from their single provider view.

To find a type of a specific duration, for example a thirty minute *Followup* appointment, hold down **Alt** while selecting the *Type* in the *Next* drop-down will prompt you for the minutes duration of the slot you are looking for.



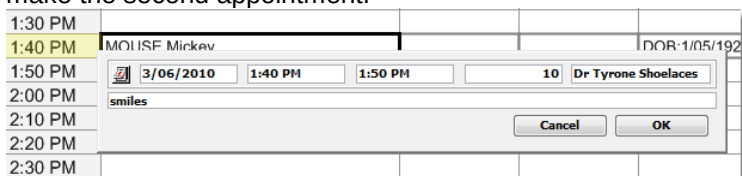
If the first available appointment located is not suitable, use the **Find Again** button to move to the next available appointment for either that doctor, or appointment type. To find a previous appointment for the selected appointment type, hold down **Ctrl** and click on the **Find Again** button. Holding down **Shift** and clicking on the **Find Again** button finds all available appointment type slots in a selected time period, and allows you to book the patient in from the same window.



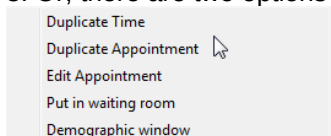
5.1.2.12 Double booking an Appointment time

To make a double booking you can:

1. Hold **Shift** while dragging out a new appointment duration over the existing appointment.
2. Double-click on the time in the appointment time column and an appointment box will appear allowing you to make the second appointment.



3. Or, there are two options available to you by right-clicking on the existing appointment.



Duplicate Time

This will open the new appointment search window allowing you to search for the patient to be booked in to the extra appointment slot. The appointment that is created will have the same start time, but will not copy any of the other features of the original appointment.

2:00 PM	MOUSE Mickey ES Julie
2:15 PM	
2:30 PM	

Duplicate Appointment

This works in the same way as Duplicate Time, however, it will copy the features of the existing appointment including the appointment type and duration.

These will then be displayed over the top of each other. Single-clicking will bring the selected patient forward. You can also choose to display the patient's details when you run the mouse over the appointment by ticking *Show Appt Details on Mouseover* in the **Appearance** tab of **Appts > Appt Preferences**.

11:45 AM	MOUSE Mickey \$ SMILES June "Julie"
12:00 PM	
12:15 PM	

Viewing Double booked appointments

When in the single provider view, the Times column will be highlighted in red to indicate that it has been double booked.

12:45 PM		
01:00 PM	SMITH CHRISTIAN Greg 8	DOB:12/02/1930 REF:Dr John Cadden L
01:15 PM		

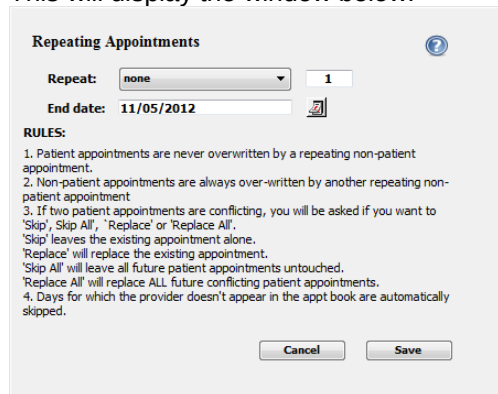
Alt+clicking on the time in red will make a window pop out allowing you to see the patients booked at that time as well as their notes. Clicking on a patient in this window will select them in the Appointment Book. Clicking on the Appointment Book will close this window.

12:45 PM		
01:00 PM	SMITH John 2	DOB:08/02/1951 REF:Dr Andrew SMALL
	CHRISTIAN Greg 8	DOB:12/02/1930 REF:Dr John Cadden
01:30 PM		

5.1.2.13 Repeating Appointments

Appointments can be made to repeat either individually or as a block by highlighting the appointment(s) to repeat, and clicking on the **Repeating Appointment**  icon.

This will display the window below:



Repeating Appointments

Repeat:

End date: 

RULES:

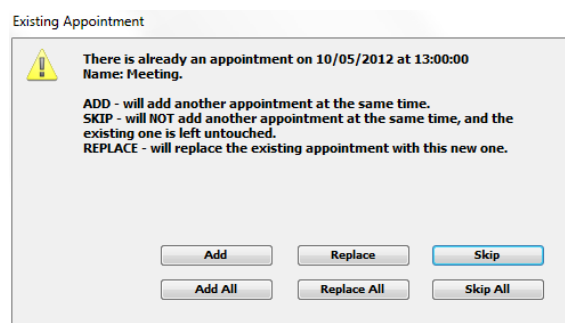
1. Patient appointments are never overwritten by a repeating non-patient appointment.
2. Non-patient appointments are always over-written by another repeating non-patient appointment
3. If two patient appointments are conflicting, you will be asked if you want to 'Skip', 'Skip All', 'Replace' or 'Replace All'.
 'Skip' leaves the existing appointment alone.
 'Replace' will replace the existing appointment.
 'Skip All' will leave all future patient appointments untouched.
 'Replace All' will replace ALL future conflicting patient appointments.
4. Days for which the provider doesn't appear in the appt book are automatically skipped.

Select the desired repeating interval from the *Repeat* drop-down menu. You can then either enter the number of times you would like the appointment to repeat in the field provided, or type an end date in the End Date field.

The **Calendar** button  is also available to select a date. Once you have selected these, press the **Save** button. Clicking on the question mark  button will open up the Genie manual to the section on repeating appointments.

Rules:

1. Patient appointments are never overwritten by a repeating non-patient appointment.
2. Non-patient appointments are always overwritten by another repeating non-patient appointment.
 'Add', 'Add All', 'Replace', 'Replace All', 'Skip' or 'Skip All'.
 'Add' will add another appointment at the same time (double book the time).
 'Add All' will add another appointment for ALL conflicting patient appointments.
 'Replace' will replace the existing appointment with the new appointment.
 'Replace All' will replace ALL future conflicting patient appointments.
 'Skip' will not add another appointment at the same time and the existing one is left untouched.
 'Skip All' will not add another appointment at the same time and will leave ALL future patient appointments untouched.
- 4). Days that the provider does not appear in the Appointment Book are automatically skipped.



Existing Appointment

 There is already an appointment on 10/05/2012 at 13:00:00
Name: Meeting.

ADD - will add another appointment at the same time.
 SKIP - will NOT add another appointment at the same time, and the existing one is left untouched.
 REPLACE - will replace the existing appointment with this new one.

Example: You have a breakfast meeting on the first Monday of each month.

1. Create a type called Breakfast Meeting, and go to the date of the next meeting and highlight the appointments slots required.
2. Go to the *Type* drop-down menu and select 'Breakfast Meeting'. This will mark the selected cells as that type.

09:45 AM	
10:00 AM	Breakfast Meeting
10:15 AM	Breakfast Meeting
10:30 AM	Breakfast Meeting
10:45 AM	Breakfast Meeting
11:00 AM	

3. With the cells still highlighted, click on the repeating drop-down menu. Select *Every 4 Weeks* from the drop-down menu, and enter 12 to make this appointment repeat for the next year. Alternatively, you can manually enter an *End Date* where the repeating appointment will finish or click on the **Calendar** button  to select a date.



Repeating Appointments

Repeat: **every 4 weeks** **12**

End date: **18/03/2013** 

RULES:

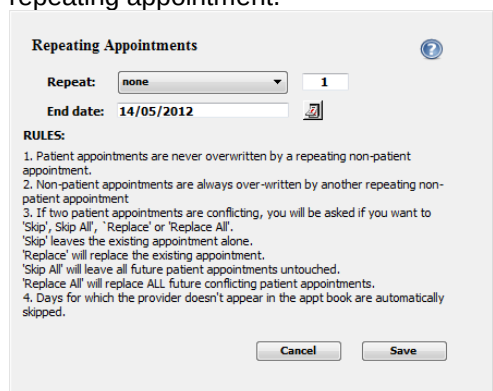
1. Patient appointments are never overwritten by a repeating non-patient appointment.
2. Non-patient appointments are always over-written by another repeating non-patient appointment
3. If two patient appointments are conflicting, you will be asked if you want to 'Skip', 'Skip All', 'Replace' or 'Replace All'.
'Skip' leaves the existing appointment alone.
'Replace' will replace the existing appointment.
'Skip All' will leave all future patient appointments untouched.
'Replace All' will replace ALL future conflicting patient appointments.
4. Days for which the provider doesn't appear in the appt book are automatically skipped.

Cancel **Save**

Deleting Repeating Appointments

To delete a repeating appointment:

1. Highlight the appointment(s) and click on the **Repeating Appointment** icon .
2. Select *none* from the *Repeat* drop-down menu, and click **Save**. This will delete all future instances of the repeating appointment.



Repeating Appointments

Repeat: **none** **1**

End date: **14/05/2012** 

RULES:

1. Patient appointments are never overwritten by a repeating non-patient appointment.
2. Non-patient appointments are always over-written by another repeating non-patient appointment
3. If two patient appointments are conflicting, you will be asked if you want to 'Skip', 'Skip All', 'Replace' or 'Replace All'.
'Skip' leaves the existing appointment alone.
'Replace' will replace the existing appointment.
'Skip All' will leave all future patient appointments untouched.
'Replace All' will replace ALL future conflicting patient appointments.
4. Days for which the provider doesn't appear in the appt book are automatically skipped.

Cancel **Save**

3. Click on the **Garbage can** icon  to delete the current instance of this appointment.

5.1.2.14 Printing Appointment Book

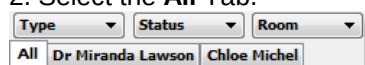
The Appointment Book can be printed in two formats:

1. Printing appointments for all doctors
2. Printing appointments for an individual doctor

The appointment schedule will only print if the *Show Schedule Type Names* option is ticked, and the *Don't print empty appointments* option is unticked in the **Appearances** tab of the Appointment Preferences (**Appt > Appt Preferences**).

Printing Appointments for all Doctors

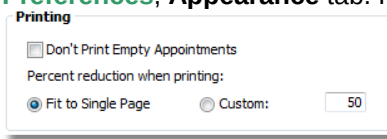
1. Navigate to the day in the Appointment Book for which you would like to print the appointments.
2. Select the **All** Tab.



Type Status Room

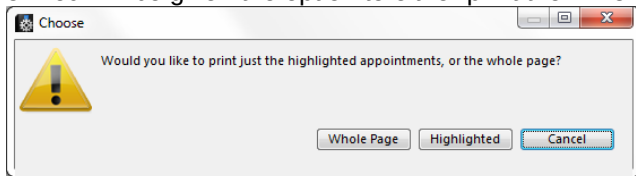
All Dr Miranda Lawson Chloe Michel

3. To adjust the size of printout, and whether to print blank appointment cells or not, go to **Appts > Appt Preferences, Appearance** tab. For more information, see [Appointment Preferences](#).

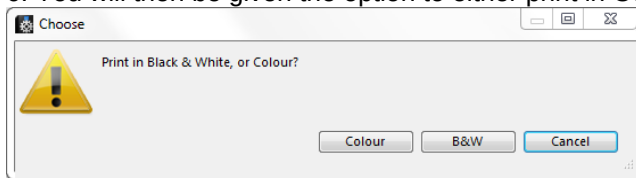


4. Click on the **Printer** icon from the Appointment Book.

5. You will be given the option to either print the **Whole Page** or the **Highlighted** appointments.

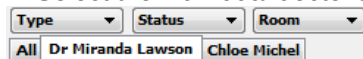


6. You will then be given the option to either print in **Colour** or **B&W**.

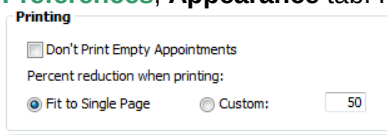


Printing Appointments for an Individual Doctor

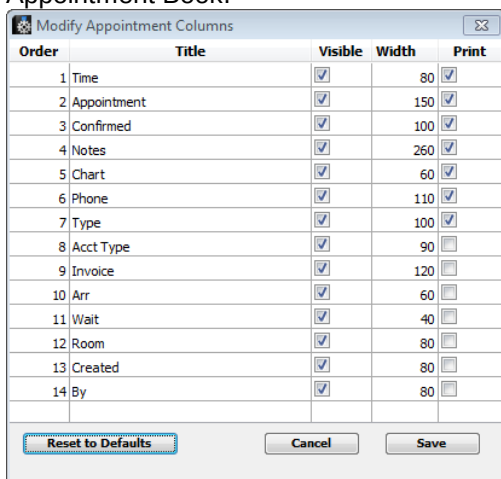
1. Select the day in the Appointment Book that you would like to print the appointments for.
2. Select the individual doctor's tab.



3. To adjust the size of print out, and whether to print blank appointment cells or not, go to **Appts > Appt Preferences, Appearance** tab. For more information, see [Appointment Preferences](#).

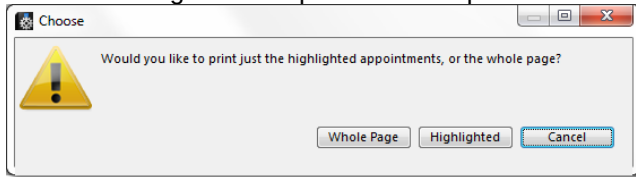


4. Go to **Appts > Appointment Preferences, Appearance** tab and click on the **Modify Columns** button. Tick the boxes in the *Print* column for each of the columns in the Appointment Book that you would like to print and click **OK**. This window also allows you to specify which columns are on view in for that individual doctor's Appointment Book.

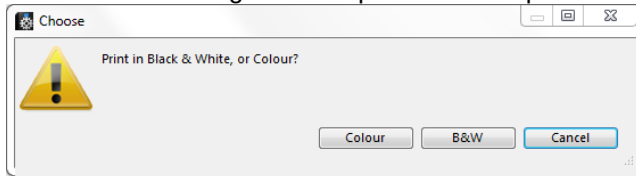


5. Click on the **Printer** icon  from the Appointment Book.

6. You will be given the option to either print the **Whole Page** or the **Highlighted** appointments.



7. You will then be given the option to either print in **Colour** or **B&W**.



Note: Alt+clicking on the Printer icon will take a snapshot of the Appointment Book and open it in an image viewer program for you to print. The file location will also open in Windows Explorer/Mac Finder.

5.1.2.15 Linking a Procedure to an Appointment

This can be used for booking patients into surgery and printing theatre lists.

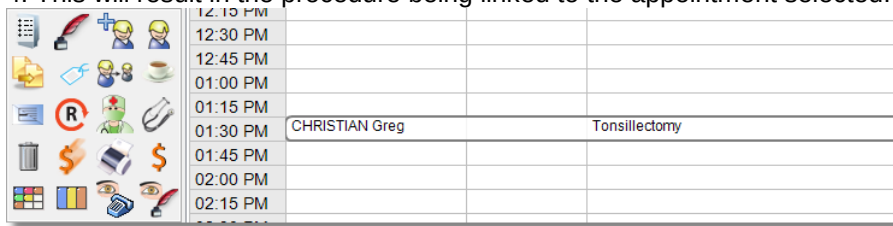
A procedure can be linked to a patient's appointment in two ways:

1. If the procedure is created in the Appointment Book.
2. If the procedure is created in the patient's Clinical Window.

Appointment book

1. Highlight the patient's name in the Appointment Book, and click on the **Procedure** icon .
2. This will open up the Procedures window.

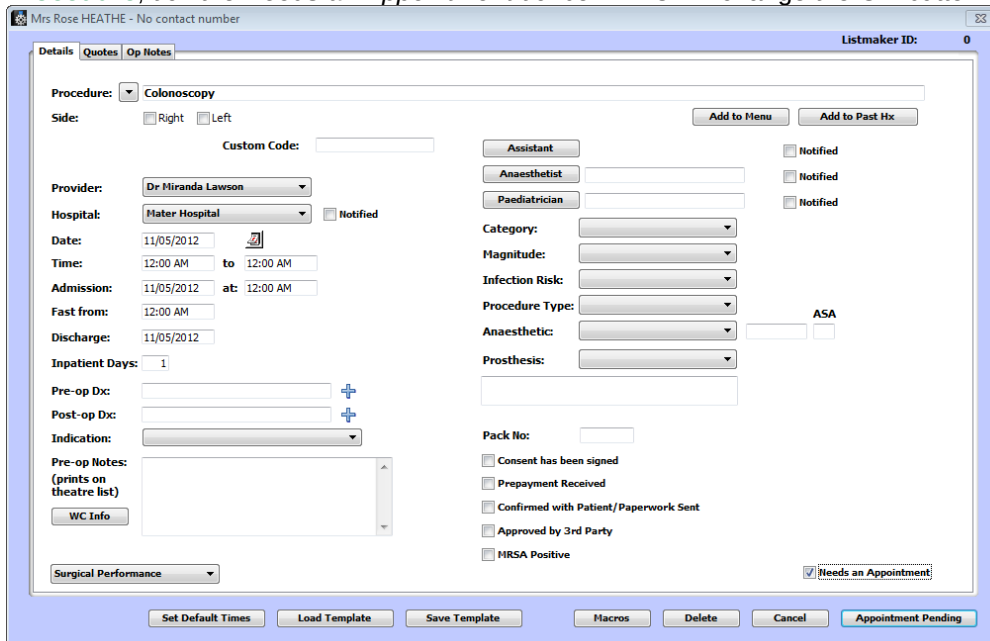
3. Complete all the necessary details and click **OK**.
4. This will result in the procedure being linked to the appointment selected.



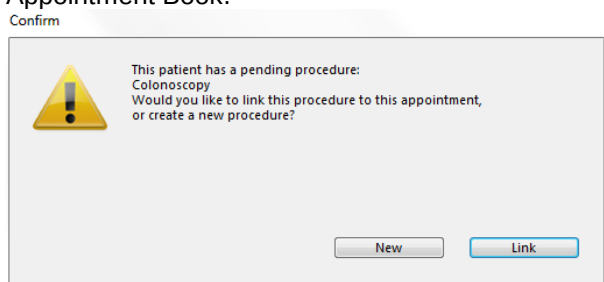
12:15 PM			
12:30 PM			
12:45 PM			
01:00 PM			
01:15 PM			
01:30 PM	CHRISTIAN Greg		Tonsillectomy
01:45 PM			
02:00 PM			
02:15 PM			

Clinical Window

Adding a procedure in the Clinical Window is useful for when a procedure is still pending and an appointment has not been created for it yet. To create a procedure in the patient's Clinical Window, go into **Tools > Add Procedure**, tick the **Needs an Appointment** tickbox. This will change the **OK** button to **Appointment Pending**.



This way the procedure remains pending until it is linked to an appointment using the **Procedure** icon on the Appointment Book.

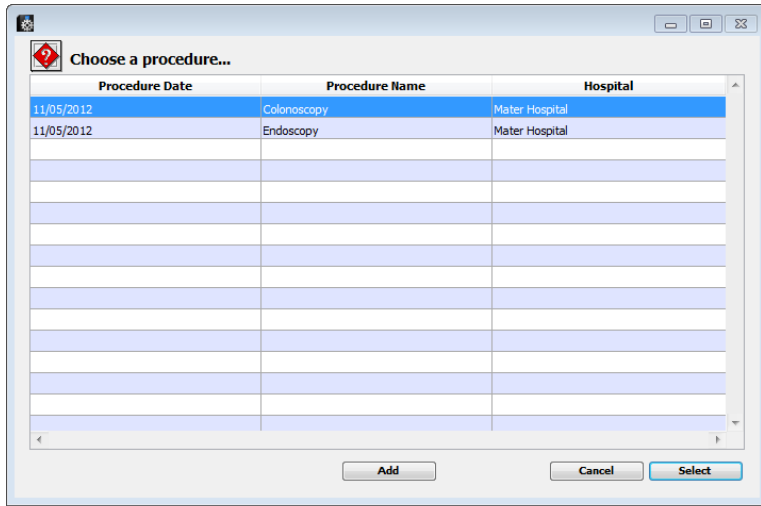
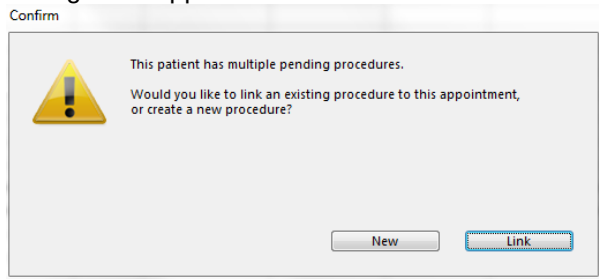


Confirm

This patient has a pending procedure:
Colonoscopy
Would you like to link this procedure to this appointment,
or create a new procedure?

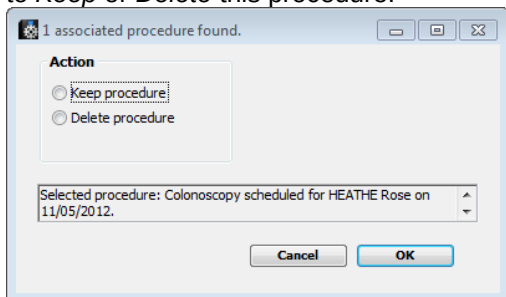
New Link

If the patient has more than one pending procedure, you will be able to select the appropriate procedure when linking to an appointment.

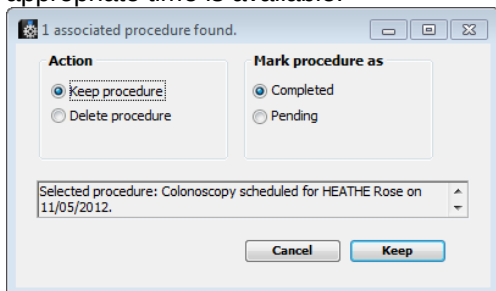


Deleting an Appointment with an Attached Procedure

If you delete an appointment that has an attached procedure, Genie will prompt you as to whether you would like to *Keep* or *Delete* this procedure.



If you select *Keep*, you will be prompted as to whether the procedure is *Completed* or if it is *Pending*. This would be used for circumstances where the procedure was cancelled with the intention of re-booking when a more appropriate time is available.



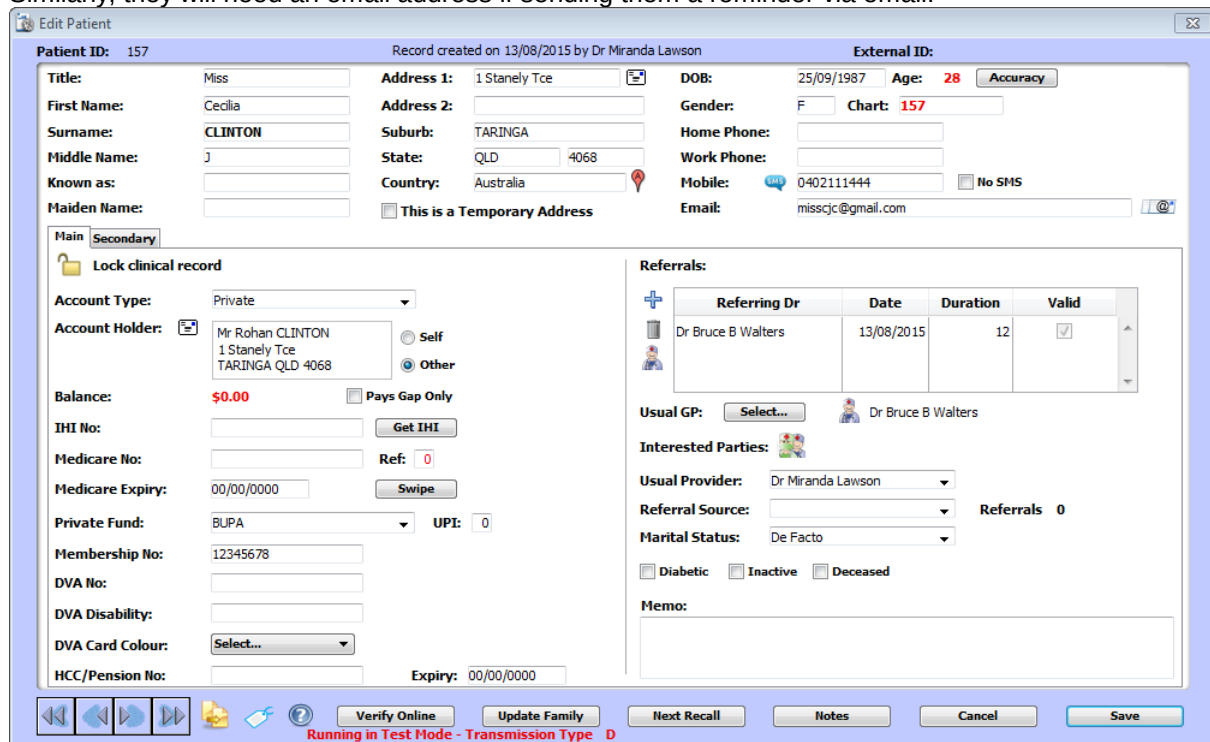
5.1.3 Appointment Reminders

You can send patients an appointment reminder by mail, SMS or email.

To send a reminder via mail, set up a template reflecting the appointment information (see [Merged Letter Templates](#) for information on how to set this up). Once you have an appointment reminder letter set up, select

each patient individually from the Appointment Book and click on the **Merged Letter Template**  icon. You will then need to select your appointment reminder letter and print it for each person. This can be a little tedious if you wish to send reminders in bulk, so it is recommended that you use SMS or email reminders for this.

If sending a reminder via SMS, the patient needs to have their mobile number entered in their demographics. Similarly, they will need an email address if sending them a reminder via email.



5.1.3.1 Genie SMS Reminders

Genie SMS Reminders allows for a completely automated appointment reminder system that sends reminders and receives replies directly into your Appointment Book.

Please note: All text messages are sent unencrypted and therefore Genie Solutions does not recommend sending personal information vis SMS.

5.1.3.1.1 Setting Up Automated SMS Reminders

Purchasing SMS Credits

To send SMS Reminders, you must first pre-purchase SMS credits. SMS credits can be purchased by:

- Navigating to **Special > Purchase SMS Credits**. This will open up a web browser to our secure Genie Solutions online store, where you can purchase SMS credits.
- Clicking the **Purchase SMS Credits** button in the SMS Reminders window (**Appts > SMS Reminders**). This will open up a web browser to our secure Genie Solutions online store, where you can purchase SMS credits.
- Directly from the [Buy SMS Credits](#) page of the Genie Solutions online store.

In a multi-provider practice, an individual provider can opt for their patients not to receive SMS reminders. To do this, tick the *Don't send SMS reminders for my appointments* preference in the General tab of that provider's User Preferences (**File > User Preferences**).

Appointments

☒ Don't send SMS reminders for my appointments

If a particular patient does not wish to receive SMS reminders, this can be done from the patient's Demographics window by ticking the **No SMS** checkbox.

Mobile: ☒ **No SMS**

To configure the automated messages you wish to send, you will need to navigate to **Appts > SMS Reminders** and click the **Setup** button.

SMS Setup

Credits

Limit each SMS to: **2 Credits**

Send a task to the Administrator when credits drop below: **100**

Reminder Templates

Right-click the practitioner to change template

Practitioners	Template
Dr Janet	Default
Dr Jessie	Short
Dr Matt	Long Message
Dr James	Default
Dr Black	Short
Dr Smith	Short
Dr Katie	Long Message

Sample Message:

Hello Al, this is a message to remind you of your appointment with Michael on 8/07/2016 at 9:20 AM. Please reply with Y to confirm or N to cancel. If you have any questions, please phone us on 1300 889 362.

Characters: 206
Credits: 2

Reminders

Send Reminders For: ☒ Consultations Only ☐ Procedures Only ☐ Consultations and Procedures

☒ Check for replies every hour

☐ Do not send an Appointment reminder if anything has been entered into the Confirmed column

☐ Send SMS for patient's subsequent appointments on same day

Automatically send SMS Messages from this computer: **MDT15-15KG1J1**

☐ the whole day's messages **2** day/s before at **12:00 AM**

OR

☐ in the morning of the same day for afternoon appointments at **12:00 AM** A random time between 8AM and 11AM

☐ in the afternoon of the previous day for morning appointments at **12:00 AM** A random time between 12:01PM and 6PM

First afternoon appointment is at **12:00 AM**

☐ Send Monday's Messages on Friday

GENIE MUST BE RUNNING ON THIS MACHINE AT THE SPECIFIED TIMES FOR MESSAGES TO BE SENT

Cancel OK

The Credits section

The *Limit each SMS to* drop-down allows you to specify how many credits Genie is able to spend on any given message. Setting this to 2 Credits, 3 Credits, or Unlimited allows Genie to send 'long' SMS reminders that exceed the previous 160-character limit. See ['Long' SMS Reminders](#) for more information on the costing for such messages.

Send a task to the Administrator when credits drop below helps you manage your SMS credits by prompting the Genie Administrator to purchase more credits when they drop below a certain level.

Note: The above preferences are available as of Genie version 8.8.6. If you are using version 8.8.5 or below, messages will be cut off after the 160-character limit is reached, and will cost one (1) credit each to send.

The Reminder Templates section

This area allows you to create the default message templates you would like to send. As of version 8.8.7, it is possible to set multiple different SMS templates for each provider in the practice. To create or edit an SMS template for a provider, right click that doctor's name in the Practitioners list on the left to open the Templates window.

Note: if you are using version 8.8.6 of Genie or earlier, you can set only one SMS template. This is done in the same way as below, however the interface will appear within the main SMS Setup window.

The drop-down menus at the top of this window allow you to select your preferred formatting for the providers' names and the appointment dates, respectively.

When creating the message, the following fields can be used to automatically populate certain information into each message:

- `<name>` - populates the name of the provider into the message.
- `<patientname>` - populates the patient's *Known as* or *First Name* information as per their [Demographics](#) window (v8.8.6 or above.)
- `<date>` - populates the date of the appointment.
- `<time>` - populates the time of the appointment.
- `<room>` - populates any [Room](#) information that has been applied to the appointment.
- `<clinic>` - populates the name of the clinic as set in **File > Practice Preferences**.
- `<clinicphone>` - populates the practice phone number as set in **File > Practice Preferences** (v8.8.6 or above).

Note: The `<clinic>` and `<clinicphone>` fields will pull the information from the default practice if you have more than one. See the [Practice Preferences](#) section for more information.

The Sample Message below the typing area will show how these fields will appear using example information. As you type, this sample message will update automatically, as will the display showing the number of characters used. If you are using version 8.8.6 or above, this area will also show the number of credits the message will cost to send.

Note: If you are not using Genie version 8.8.6 or above, messages above 160 characters will be truncated. The remainder of the message will not be sent, so it is important to keep the message within the 160 character limit. Remember to take into account the number of characters in the longest provider's name if you are in a multi-doctor practice.

'Long' SMS Reminders

As of version 8.8.6, Genie is capable of sending 'long' SMS reminders. Instead of being cut off, longer messages will cost more credits to send. How the number of credits used is calculated is outlined below.

Note: This functionality is opt-in. To send long messages, you must first enable them by increasing the Limit each SMS to preference in the SMS Setup window. A setting of 1 Credit will keep the 160 character limit in place.

A 'simple' SMS contains up to 160 characters. Any message below this 160-character limit will cost one (1) SMS credit to send.

A 'long' SMS contains more than 160 characters. Each block of 153 characters, or part thereof, in a long SMS costs one (1) SMS credit to send (a 7 character overhead is required by the messaging provider to join the blocks).

The rates for long SMS reminders are, therefore:

- 1-160 characters = 1 credit (a 'simple' SMS).
- 161 – 306 characters = 2 credits (2 blocks of 153 characters).
- 307 – 459 characters = 3 credits (3 blocks of 153 characters).
- etc.

Non-standard Characters

If your SMS Reminders include any non-standard characters that are not part of the Global System for Mobile (GSM) Standard, this will affect the way SMS credits are used. A 'simple' SMS contains up to 160 characters. Any message below this 160-character limit will cost one (1) SMS credit to send. If your SMS Reminders include any non-standard characters, you will be limited to 70 characters per SMS Credit for the first credit. The character limit goes down to 67 if the entire message is more than 1 credit.

The rates for SMS Reminders with non-standard characters are therefore:

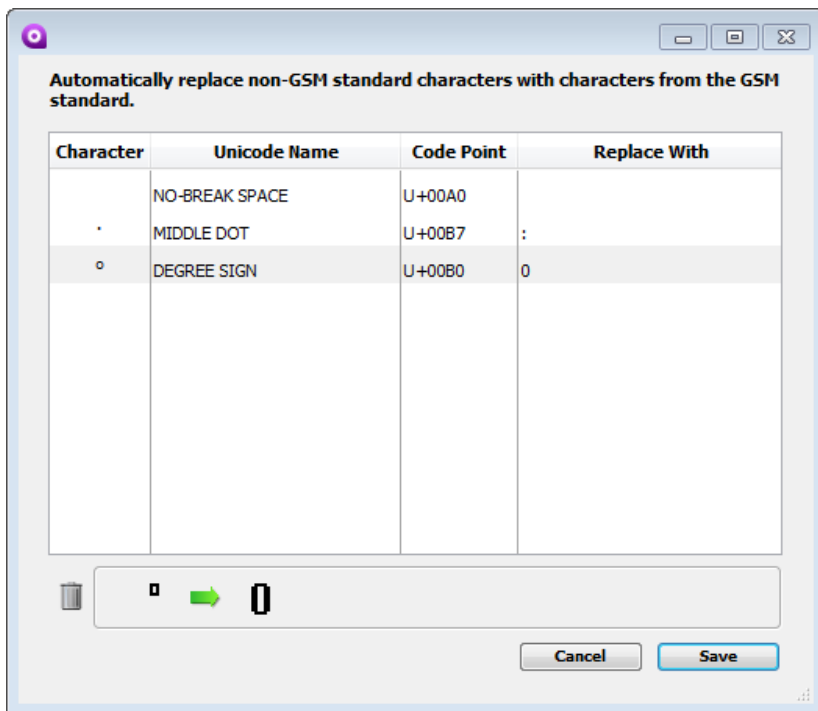
- 1-70 characters = 1 credit
- 71-134 = 2 credits (2 blocks of 67)
- 135-201 = 3 credits (3 blocks of 67)
- etc.

As of Genie 9.0.2, if your SMS Reminder template includes any non-standard characters you will receive a prompt identifying the non-standard character, as in the below screenshot.

The screenshot shows a window titled 'Template' with a 'Template name' field set to 'Default'. Below this is the 'Reminder Message Format' section, which includes 'Name Format' (set to 'Title+First+Surname') and 'Date Format' (set to 'May 26, 2017'). A 'Sample Message' button is present. The main text area displays a template message: 'Hi <patientname>, this is a reminder of your <time> appointment with <name> on <date> at <clinic> ~Please reply with 'Y' to confirm or 'N' to cancel or call <clinicphone>.' Below this, a 'Sample Message' preview shows the message rendered with a tilde (~) as a non-standard character. At the bottom, a summary table shows 'Total Characters Used: 198', 'Allowed Characters per Credit: 67', and 'Total Credits Used: 3'. A red warning message states: 'THIS MESSAGE CONTAINS 1 CHARACTER WHICH IS NOT PART OF THE SMS STANDARD. THIS WILL RESULT IN FEWER CHARACTERS BEING SENT PER SMS CREDIT AND THEREFORE EXTRA CREDITS MAY BE REQUIRED FOR SENDING. BASED ON THE CREDIT LIMIT SET IN YOUR SMS PREFERENCES, AS THIS MESSAGE CONSUMES GREATER THAN 2 SMS CREDITS IT WILL BE SHORTENED AUTOMATICALLY WHEN SENT!'. A 'Non-Std Char' box on the right shows the tilde (~). At the bottom left is an 'Auto Replace...' button, and at the bottom right are 'Cancel' and 'OK' buttons.

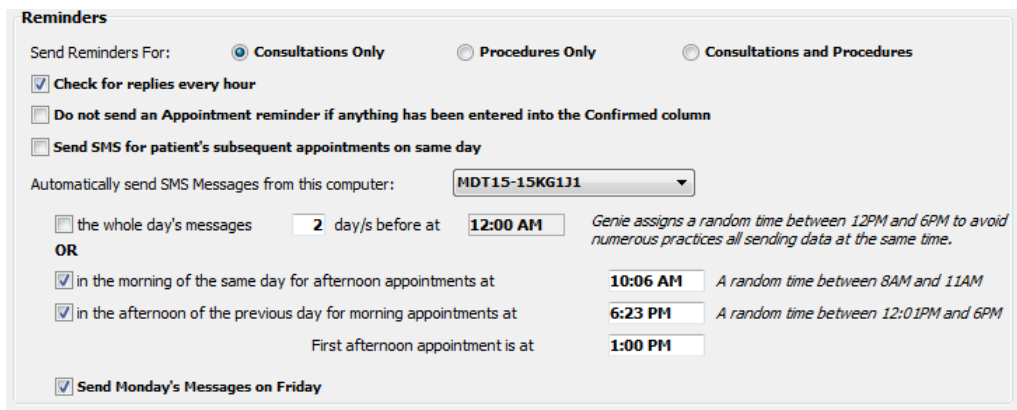
Total Characters Used:	198	THIS MESSAGE CONTAINS 1 CHARACTER WHICH IS NOT PART OF THE SMS STANDARD. THIS WILL RESULT IN FEWER CHARACTERS BEING SENT PER SMS CREDIT AND THEREFORE EXTRA CREDITS MAY BE REQUIRED FOR SENDING. BASED ON THE CREDIT LIMIT SET IN YOUR SMS PREFERENCES, AS THIS MESSAGE CONSUMES GREATER THAN 2 SMS CREDITS IT WILL BE SHORTENED AUTOMATICALLY WHEN SENT!
Allowed Characters per Credit:	67	
Total Credits Used:	3	

The **Auto-Replace** button in the bottom right-hand corner of the window offers suggestions for replacements for non-standard characters, as in the following screenshot.



Once you have configured the message you wish to send, you can then configure how and when you want the automated messages to be sent.

The Reminders section



Use the appropriate radio buttons to select whether you wish to send reminders for *Consultations Only*, *Procedures Only*, or for both *Consultations and Procedures*.

The *Check for replies every hour* tickbox will prompt Genie to check for replies to any messages sent each hour after sending. Please be aware that the computer sending the messages must be switched on, with Genie running, to make these automatic checks.

Ticking *Do not send an Appointment reminder if anything has been entered into the Confirmed column* will exclude confirmed appointments from the automated SMS reminders. This tickbox is only available in version 8.8.6 of Genie and later.

Use the drop-down menu below the Reminders area to designate which computer on the network will send and receive SMS reminders and replies. By default, the computer selected will be the workstation from which you first access this window, but you can change this to any Genie workstation on the network.

The tickboxes below this dictate when messages will be sent. You can send an entire day's messages a specific number of days in advance, or you can send morning reminders for afternoon appointments and afternoon reminders for the following morning. If you are sending reminders based on morning and afternoon appointment

times, you must set the *First afternoon appointment is at* field, so that Genie can differentiate between morning and afternoon appointments.

When you select one of the above scheduling options, Genie will automatically generate a random time for the messages to be sent. If you are not happy with the time selected, simply untick and re-tick the appropriate box until a suitable time is generated. You may manually enter a time, however please be aware that messages sent on the hour or half-hour can be delayed, as these are popular intervals for sites to transmit at.

Note: The computer designated for sending and receiving messages must be powered on, connected to the Internet, and logged into Genie at the scheduled time. Otherwise, the messages will not be transmitted.

Finally, if you wish to avoid leaving a computer logged in over the weekend to send messages, tick the *Send Monday's Messages on Friday* tickbox. Genie will then send any messages for Monday appointments on Friday instead.

Once you have finished configuring your automated reminders, click the **OK** button to save your settings and close the Setup window.

5.1.3.1.2 Sending SMS Manually

SMS reminders and messages can be sent manually from different areas of Genie for different purposes.

Daily Reminders

To manually send SMS reminders for all appointments on a given day, navigate to that day in the appointment book, and then navigate to **Appt > SMS Reminders** to open the SMS Reminders window.

[illegible]

Note: The SMS Reminders window will look different if you are using version 8.8.5 of Genie or earlier. Prior to version 8.8.6, the appointments/patients in the window cannot be subdivided by provider, and cannot be sorted using the column headers.

In the top-right corner of the window, the number of remaining SMS credits will be displayed in red. If you are using an earlier version of Genie, you will need to click the **Show Remaining Msgs** button to show this.

The **Purchase SMS Credits** button will take you to the Genie Solutions online store, allowing you to purchase more credits when you are running low.

On the left, all providers visible in the appointment book for the selected day will be shown. Highlighting a provider's name will limit the patients shown to just those whom that provider is seeing. To display and message patients for multiple providers at once, hold the Ctrl key (Command on a Mac) and click each relevant provider to

highlight them.

Once the appropriate list of patients is displayed for that day, click the **Send** button. Genie will send an SMS reminder for all patients marked with a tick in the  column. By default, this will exclude any patients without a mobile number recorded, as well as any patients with *No SMS* ticked in their demographics window.

Note: the reminders sent will be the default message you have created in the Setup window. You should ensure that this message is configured correctly before you start sending for the first time.

For a report on all messages sent and received through Genie, you can use the **Monthly Report** and **Daily Report** buttons. These SMS reports will produce a PDF document summarising the SMS activity for the given month/day. For more information about these reports, please see the [SMS Reporting and History](#) section.

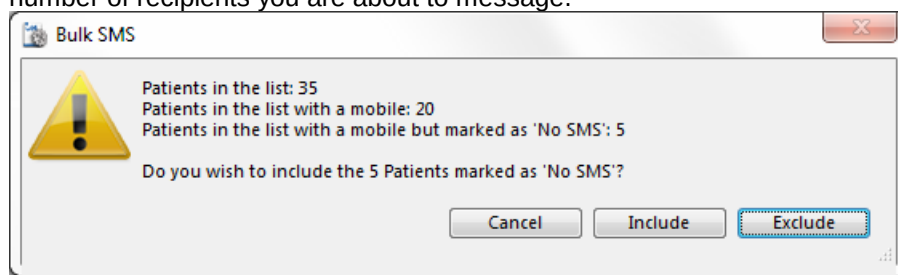
Bulk Messages

As of Genie version 8.8.6, it is possible to send SMS messages in bulk to large groups of people from the Patients list, the Address Book, and the Recalls Due window.

In these windows, you will see the  icon. Clicking this will allow you to send a bulk message to everyone currently shown in the list.

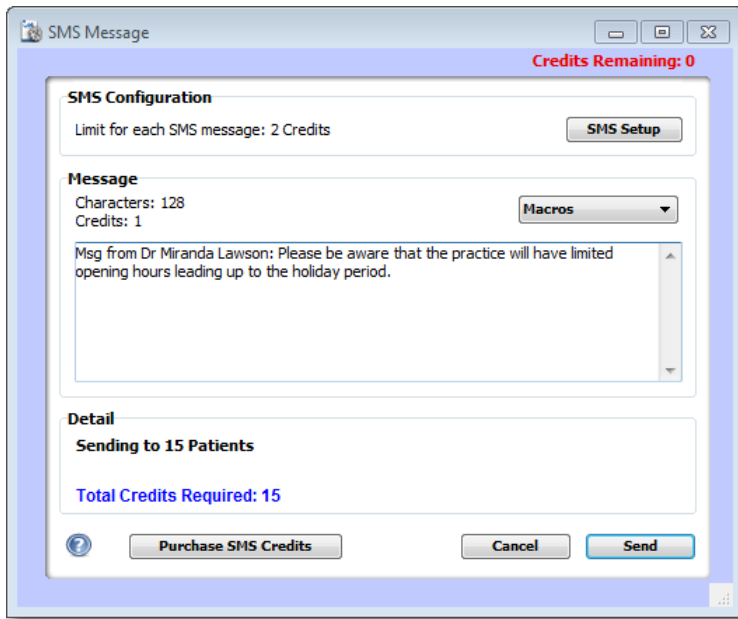
Note: This feature will send messages to all recipients currently loaded, not just those you highlight. If you wish to only message a small highlighted number of records, you will need to limit the list to only these records by navigating to **Records > Use Selected.**

Once you are happy with the list of recipients shown, clicking the  icon will produce an alert confirming the number of recipients you are about to message.



The prompt will show the number of recipients in the current selection, the number of those recipients with a mobile number listed, and the number of *those* recipients marked as *No SMS*. Select **Include** or **Exclude** to decide whether you wish to send messages to *No SMS* patients. Genie will then allow you to write the custom message you wish to send.

Note: Prior to Genie 9.0.2, the Recalls window did not produce the message prompt shown below - please be aware that it will send the messages as soon as you have confirmed the number of recipients.



Note: The custom messages you send will be subject to the SMS credit limit set in the [SMS Setup](#) window, which can only be changed from that window.

Like automated messages, Genie will display here the number of credits it will take to send the bulk message. At the bottom of the window, you will also see the total credits required to send the bulk message to all selected patients. Click the **Send** button once you are happy with the message.

If you're running Genie 9.0.2 or later, when an SMS Reply is received from a recipient in the Address Book, a Task will be created for the user who sent the message. If the user who sent the message cannot receive Tasks, a Task will be created for the Genie Administrator.

Individual Messages

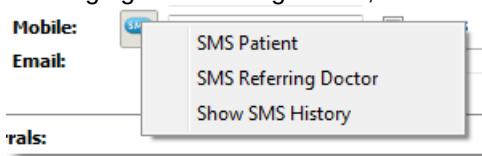
Version 8.8.6 of Genie also introduces the ability to send individual messages from patient and address book records.

To send an individual SMS, click the  icon next to the recipient's mobile number.

Mobile:  0412345678

Clicking this icon in an address book record will open the SMS Message window as shown in the Bulk Messages part of this section.

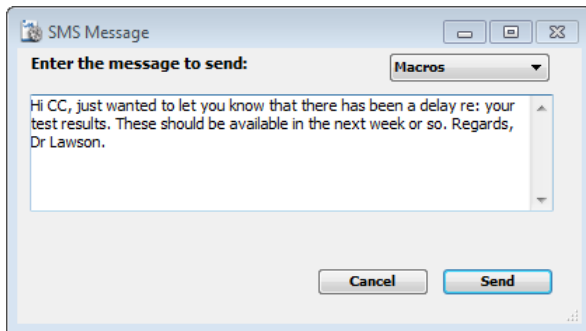
Clicking this icon in a patient's demographic window will give you the options of messaging the patient, messaging the referring doctor, or reviewing the patient's message history.



For information on patient SMS History, please see the [SMS Reporting and History](#) section.

Once you have created the message you wish to send to the recipient, click the **Send** button.

If you are using version 8.8.5 of Genie or earlier, you can still send individual messages to patients and their referring doctors by right-clicking the patient's appointment and selecting *SMS Patient* or *SMS Referring Doctor*. A basic message window will appear, allowing you to enter a customised message or reminder.



As with Bulk Messages, if you're running Genie 9.0.2, a Task will be created when an SMS Reply is received from a recipient in the Address Book. The Task will be sent to the Genie user who sent the message. If the user who sent the message cannot receive Tasks, a Task will be created for the Genie Administrator.

5.1.3.1.3 SMS Replies

Retrieving Replies

If *Check for replies every hour* is ticked in the SMS Setup window, Genie will make a check once per hour to retrieve any replies that patients have sent.

Note: Like automated sending of messages, Genie will only be able to retrieve replies while the designated computer is switched on and Genie is running on that machine.

To manually retrieve replies, navigate to **Appts > Get SMS Replies**. Alternatively, navigate to **Appts > SMS Reminders**, select the Receive tab in the SMS Reminders window, and then click the **Get All Replies** button.

Any replies that Genie retrieves will be shown in the Receive tab, as well as the *Confirmed* column of their respective appointments in the Appointment Book.

Appointment Book Display

The *Confirmed* column is visible in the Appointment Book when an individual provider's tab is selected. Once an SMS is sent, the column will populate with *Awaiting Reply*.

02:45 PM			
03:00 PM	CLINTON Cecilia	Awaiting Reply	DOB:25/09/1987 REF:Dr Bruce B Walter (12/08/2015)
03:15 PM			

When a reply is received from a patient, the *Confirmed* column will display the content of the patient's reply.

02:45 PM			
03:00 PM	CLINTON Cecilia	Yes	DOB:25/09/1987 REF:Dr Bruce B Walter (12/08/2015)
03:15 PM			

If Genie recognises the patient's message as a simple confirmation – e.g. 'Y'/'N', or 'Yes'/'No' – then it will assign a colour to the text when it is displayed in the *Confirmed* column. An affirmative response will be displayed in **green**, while a negative response will display in **red**. This allows you to see at a glance who has confirmed their appointment.

Note: The green/red colours are hard-coded into Genie and cannot be adjusted. To ensure that these are easily readable, make sure that the colours selected for your appointment types are not similar to these colours.

If two patients share a phone number – e.g. a parent and child who each have an appointment – please bear in mind that Genie may not be able to differentiate between the two when replies are retrieved for those appointments. If this occurs, the replies displayed in the *Confirmed* column for the two appointments may be swapped. In circumstances like these, it is worth double-checking with the patient(s).

To make the *Confirmed* column easier to see and read, you may need to resize or move it. To do this, please see [Modify Appointment Columns](#) in the Appointment Preferences section.

Toggle SMS Replies

It is also possible to display SMS replies in the appointment book when displaying all providers via the **All** tab. To do this, navigate to **Appts > Toggle SMS Replies**. The patient names showing in the appointment book will be replaced with any replies those patients have sent through.

Selecting **Toggle SMS Replies** again or clicking the **TODAY** button in the top-left of the Appointment Book will return the display to normal.

5.1.3.1.4 SMS Reporting and History

Daily and Monthly Reports

From the SMS Reminders window (**Appts > SMS Reminders**), Genie allows you to generate reports showing all messages sent and received for a given day or month.

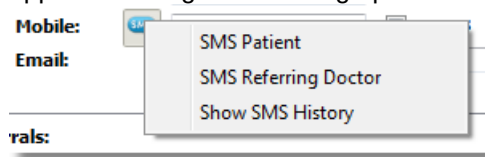
To generate these reports, click the **Daily Report** and **Monthly Report** buttons, respectively, at the bottom of the SMS Reminders window.

When generating the Monthly Report, Genie will give you the option of showing a quick summary – just the number of messages sent and received – or a detailed report, showing dates, times, recipients, and the content of the messages. The Daily Report is always generated as a detailed report.

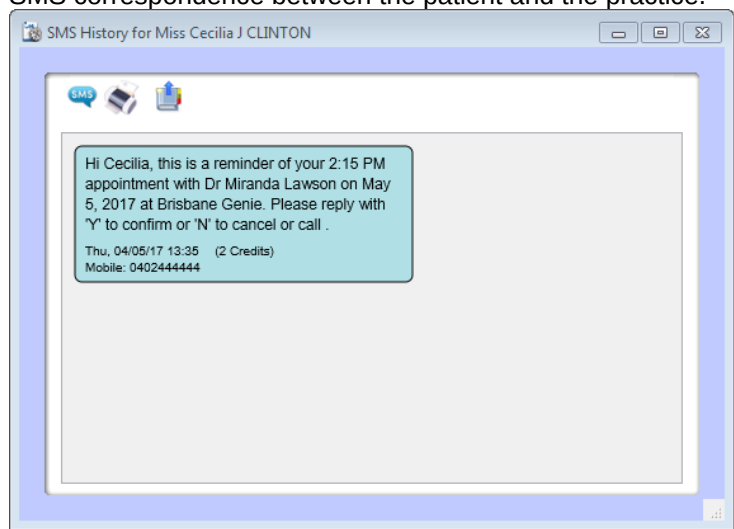
If you are using version 8.8.7 or above, the Monthly Report can also be subdivided by provider when generating it.

SMS History

As of version 8.8.7, Genie records each patient's SMS history within their demographic and clinical windows. To access a patient's SMS History, open their demographic or clinical window and click on the  icon. A menu will appear showing the following options:



Select the **Show SMS History** option to open the SMS History window for this patient. This window shows all SMS correspondence between the patient and the practice.



Clicking the  icon at the top of this window will allow you to send a new message from within the SMS History window.

Clicking the  icon produces a report summarising the patient's SMS history, similar to the Daily and Monthly

reports.

Clicking the  icon allows you to export the patient's SMS history as a plain text file (.txt).

5.1.3.2 Email Reminders

It is necessary to set up your Genie [Email Module](#) if you would like to send email reminders. To send email reminders to patients, go to the day of appointments you would like to send messages for and go to **Appts > Email Reminders** to open the following window:

[illegible]

This window will only display those patients with an email address in their Patient Demographics window. It will automatically tick patients who have an email address and who have not already received an SMS reminder. The reason for this is that, if you send both an email and SMS reminder, then the patient may choose to reply to the email, and ignore the SMS, in which case you will lose the automated benefit of an SMS Reply. For this reason also, it is important that you send any SMS reminders before sending email reminders, because Genie can tell if an SMS reminder has been sent, but is unable to tell if an email reminder has been sent.

Note: even if you aren't using SMS Reminders, you can still use the Confirmed column in the Appointment Book. You can type directly into it, or right-click and select Mark as Confirmed.

You can choose to select only those appointments that have procedures linked to them by ticking the *Procedures Only* tickbox. You can also select if you would like to view patients for all providers or select providers by selecting the respective radio button.

5.2 Theatre Lists

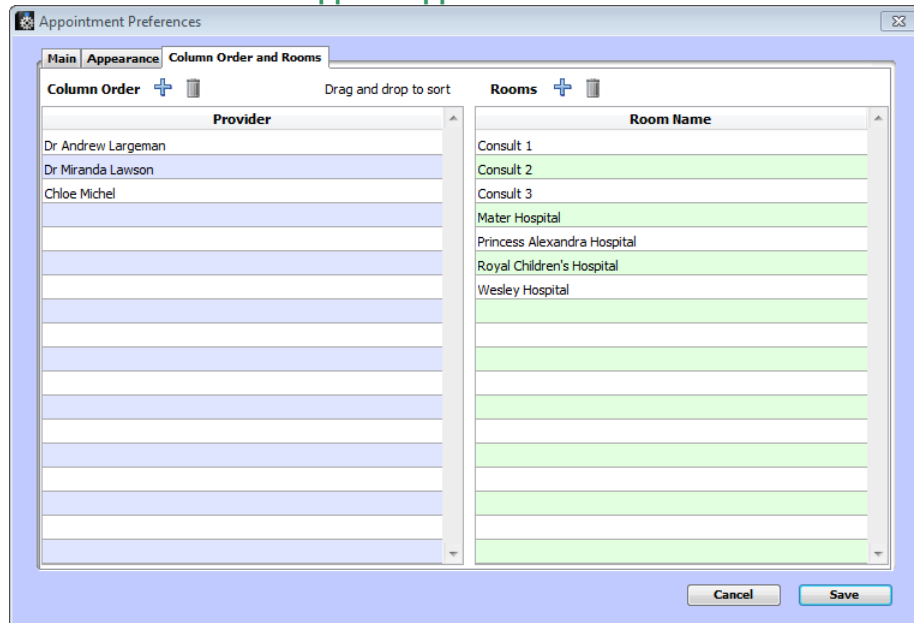
To print a theatre list you must:

1. Have Rooms set up in Genie
2. Have entered in a Room (hospital) into the Procedure window.

5.2.1 Set Up

Setting Up Rooms

Rooms are essentially all the Hospitals/Day Surgeries where a doctor operates. These can be added via **Appts > Appt Preferences > Column Order and Rooms**



To add a room, click on the **Blue plus** button above the Rooms table. To delete a room, click on the **Garbage can** button. You can drag rooms up and down the list to change the column order of the rooms in the Appointment Book.

Bookings for these hospitals can be viewed on the Appointment Book via the **Hospital**  view.

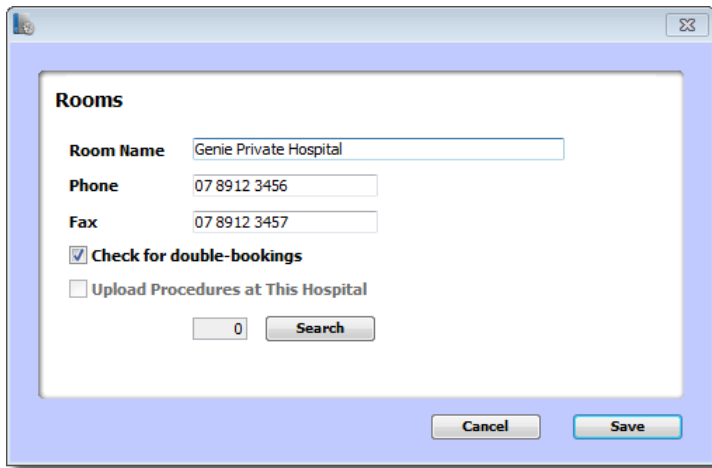
All	Dr Andrew Largeman	Dr Miranda Lawson	Chloe Michel
Times	Mater Hospital	Princess Alexandra Hospital	
09:45 AM			
10:00 AM			
10:15 AM			
10:30 AM			
10:45 AM			
11:00 AM	LEE Anna		
11:15 AM			
11:30 AM			
11:45 AM		SMYTHE Joan 24	
12:00 PM			
12:15 PM			
12:30 PM			
12:45 PM			
01:00 PM			
01:15 PM			
01:30 PM			
01:45 PM			
02:00 PM		ADAMS Bryan "Patch" 6	

Note: The 'Hospital' view just filters out the appointments that don't have a procedure attached, or don't have a room specified, in the procedures window. It is not an independent Appointment Book. Any appointments booked in this view will also show in the Provider and Dates view.

Checking for Double-bookings

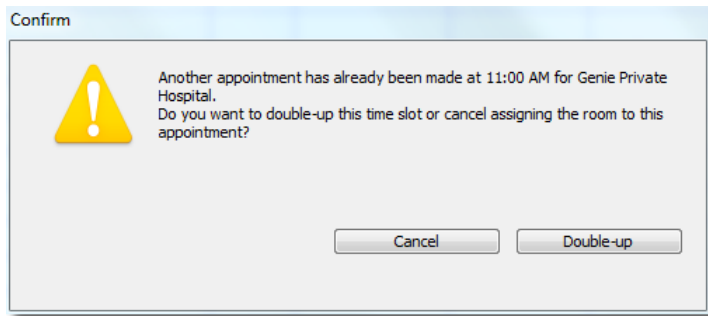
If your room is only able to be used by one provider at one time (e.g. a private consulting suite), Genie can check for double-booked appointments.

To check for double-booked rooms, go into **Appts > Appointment Preferences** and click on the **Column Order and Rooms** tab. Double-click on the relevant room this window and tick the *Check for double-bookings* checkbox.

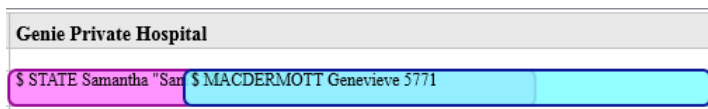


Click on **Save** to finalise this change.

If a user attempts to allocate an appointment to this room when it is in use, they will receive the following prompt.



Selecting **Double-up** will double-book this appointment with the existing appointment. In the Rooms view for all providers, you will now see the appointments overlapped.



Selecting **Cancel** will cancel your room allocation for this patient, allowing you to allocate an alternate room.

Selecting a Room (Hospital) in the Procedures Window

A patient will only appear on the theatre list if the hospital is specified in the **Details** tab of the Procedures window, which is then linked to that appointment.

5.2.2 Printing a Theatre List

To print a theatre list, go to the day of the surgery in the Appointment Book and select **Appts > Print Theatre List**.

You can choose whether you would like to print the whole theatre list, or just a specific time period as highlighted in the Appointment Book. You can change the *Start Time* by entering the appropriate start time in this field. Select the *Provider* and the *Hospital* as appropriate.

Print Times will print the times of the procedures as specified by the slot booked into in the Appointment Book.
Print Number will print the order number next to the procedure.
Print Nothing will just print the procedures in order without times or an order number.

Admission Date & Time will print the admission date and time for the procedure.
Item Numbers will print the item numbers listed in the quote section.

Referrer's Email will print the patient's referring doctor's email address.

Referrer's Fax will print the patient's referring doctor's fax number.

Mark as Final will put "FINAL" on the theatre list; otherwise it will be marked as "DRAFT."

Consent Status will print whether or not Consent has been signed, as determined by the tick box in the **Details** tab of the Procedure window.

Account Type will print if ticked, as specified in the patient's demographics window.

Fasting Time will appear as specified in the **Details** tab of the Procedure window.

NOK Details will print the patient's next of kin, as shown in the **Secondary** tab of the patient's demographics window.

Once you have done this, click on the **Print** button and the theatre list will be printed. If you would like to Email the theatre list, you can click on the **Email** button. This will email the list as a PDF document, provided you meet the following requirements:

- The [Email module](#) is set up in Genie
- The hospital is listed in **Open > Address Book** with an email address
- The computer has [Ghostscript](#) installed (Windows only requirement)

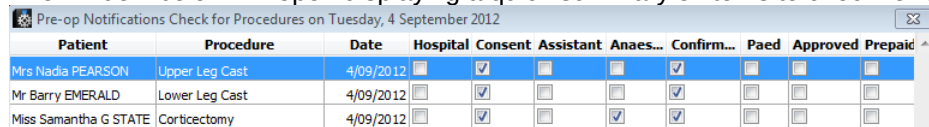
Note: If the printed theatre list is incorrect, you may have failed to select a hospital for the procedure in the Procedure record. Alternatively, you may not have linked a procedure to the appointment yet.

5.2.3 Preop Notifications Check

You can do a quick check the day before a theatre list to make sure that the *Hospital* and *Assistant* have been notified.

Select **Appointments > Pre-op Notifications Check**

The window below will open displaying a quick summary of items to check for each procedure.



Patient	Procedure	Date	Hospital	Consent	Assistant	Anaes...	Confirm...	Paed	Approved	Prepaid
Mrs Nadia PEARSON	Upper Leg Cast	4/09/2012	☒	☒	☐	☐	☒	☐	☐	☐
Mr Barry EMERALD	Lower Leg Cast	4/09/2012	☒	☒	☐	☐	☒	☐	☐	☐
Miss Samantha G STATE	Corticectomy	4/09/2012	☒	☒	☐	☒	☒	☐	☐	☐

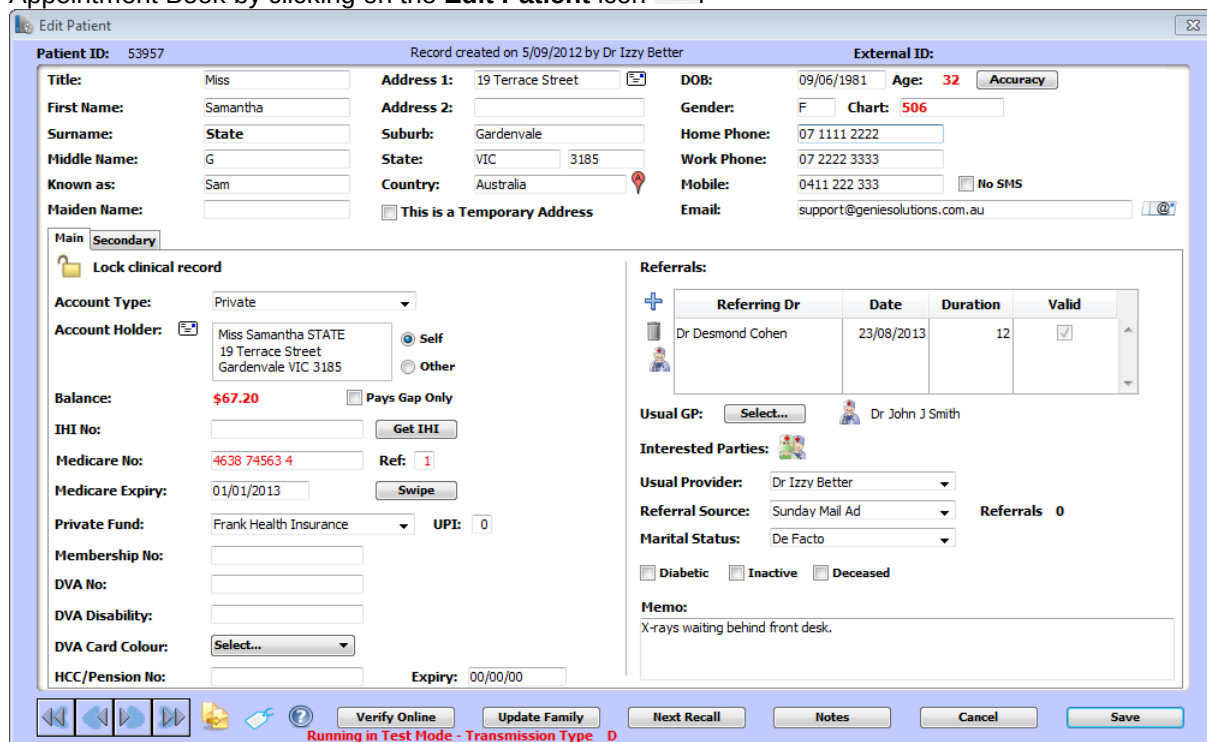
For more information, please see the [Procedures](#) section.

5.3 Invoicing

Genie allows you to invoice and receipt patients and organisations. Invoices can either be single invoices or batched invoices. Batched invoices are used for bulk-billed Medicare and DVA claims. You can also batch invoices to other organisations, such as private health funds.

5.3.1 Account Holders

Before a patient or an organisation can be invoiced, they must have a record in the Account Holders list. The account holder for a patient is assigned in the Patient Demographics, you can enter this window from the Appointment Book by clicking on the **Edit Patient** icon .



Edit Patient
Patient ID: 53957 Record created on 5/09/2012 by Dr Izzy Better External ID:

Title: Miss **Address 1:** 19 Terrace Street **DOB:** 09/06/1981 **Age:** 32 **Accuracy**

First Name: Samantha **Address 2:** **Gender:** F **Chart:** 506

Surname: State **Suburb:** Gardenvale **Home Phone:** 07 1111 2222

Middle Name: G **State:** VIC 3185 **Work Phone:** 07 2222 3333

Known as: Sam **Country:** Australia **Mobile:** 0411 222 333 **No SMS**

Maiden Name: **This is a Temporary Address** **Email:** support@geniesolutions.com.au

Main **Secondary**

Lock clinical record

Account Type: Private

Account Holder: Miss Samantha STATE 19 Terrace Street Gardenvale VIC 3185 **Self** **Other**

Balance: \$67.20 **Pays Gap Only**

IHI No: **Get IHI**

Medicare No: 4638 74563 4 **Ref:** 1

Medicare Expiry: 01/01/2013 **Swipe**

Private Fund: Frank Health Insurance **UPI:** 0

Membership No:

DVA No:

DVA Disability:

DVA Card Colour: Select...

HCC/Pension No: **Expiry:** 00/00/00

Referrals:

Referring Dr	Date	Duration	Valid
Dr Desmond Cohen	23/08/2013	12	☒

Usual GP: Select... Dr John J Smith

Interested Parties:

Usual Provider: Dr Izzy Better

Referral Source: Sunday Mail Ad **Referrals:** 0

Marital Status: De Facto

☐ Diabetic ☐ Inactive ☐ Deceased

Memo:
X-rays waiting behind front desk.

Running in Test Mode - Transmission Type D

Verify Online **Update Family** **Next Recall** **Notes** **Cancel** **Save**

Clicking on the **Self** radio button in the middle left of this window makes the patient their own account holder, and creates a new record in the Account Holders table. Clicking the **Other** button allows you to make another patient the account holder for this patient. This would usually be the parent or guardian of the patient. You must have already created a patient record for the parent or guardian and assigned them to be their own account holder.

IMPORTANT: THE ACCOUNT HOLDER FOR A PATIENT MUST BE ANOTHER HUMAN BEING. YOU MUST NOT MAKE AN ORGANISATION THE ACCOUNT HOLDER EVEN IF THE PATIENT IS A DVA OR WORKCOVER PATIENT.

The majority of specialists would usually have all their patients marked as **Self**. GPs who are seeing the whole family would probably use the **Other** button to assign the head of the family to be the account holder. This will allow any changes made to the Head of Family record to be replicated to other family members, using the **Update Family** Button.

For Pediatricians and one-off child visits there is no need to create a patient record for the head of the family. In this case, click on the **Self** radio button to make the child their own account holder.

Then click on the account holder address window.



Account Holder: Miss Samantha STATE 9 Terrace Street GARDENVALE VIC 3185 **Self** **Other**

This opens the account holder's record.

In this window you can change the details shown to those of the appropriate parent, e.g. first name, surname (if applicable), date of birth, etc. These are the details will print on invoices and statements. So although the child is marked as their own account holder, when you print invoices they will be addressed to the head of the family.

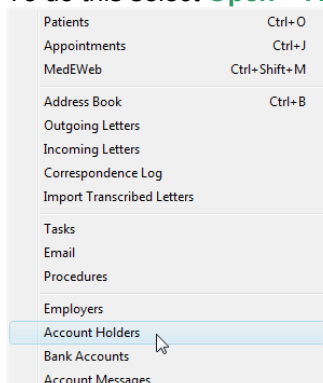
The account holder record contains the name and address of the account holder, as well as the Medicare number and account balance.

You can Blacklist a patient, preventing an appointment being made for them, by ticking the *Blacklist* tickbox.

5.3.2 Account Holders for Organisations

Before you can invoice an organisation such as Workcover, an employer, or a private health fund, you must first create an account holder record for them.

To do this select **Open > Account Holders**.



The Account Holders list opens.

AccountHolder: 56 of 56 Records - Current User Dr Andrew Largeman

view all

Bad Debts

Name	State	Suburb	Balance	Acct ID	Last Payment
ACA Health Benefits	NSW	WAHROONGA	0	13	00/00/00
Adams, Bryan	QLD	CORINDA	149.5	43	00/00/00
Australian Health Management	NSW	MATRAVILLE	0	11	00/00/00
Australian Unity Health	QLD	BRISBANE	0	12	00/00/00
Brown, Ella	QLD	FOREST LAKE	1018.5	44	00/00/00
BUPA	QLD	BRISBANE	0	99	00/00/00

To create a new account holder, click on the **Blue plus** button . This will open the window below.

New Account Holder

Company: ☐ Batch Process Invoices

Address Line 1: ☐ Charge GST for ALL items

Address Line 2: ☐ **Blacklist** (Don't allow appointments)

Suburb: Reason:

State: P/code: Notes:

Phone: Fax:

Balance:

Account ID:

WorkCover Online:

Use this schedule when invoicing this organisation.

OR

Use this schedule if it's a Private Health Fund.

The patient's Account Type will be used if neither of these is selected.

Multiple Procedure Rule to Employ:
(100/50/25 used if nothing is selected)

If you would like to batch the invoices for this organisation, tick the *Batch Process Invoices* tickbox. Batch processing means that instead of sending an individual invoice for each patient contact, the invoices are stored and printed as a batch perhaps weekly or monthly.

The printed batch is a listing of all the invoices stored and can be forwarded with or without the individual invoices attached, depending on the organisation's requirements. See the section on [Batching](#) later in this Chapter.

The **Update Balance** button can be used in situations in which a patient's account displays an outstanding balance that you know is not valid. Clicking on the **Update Balance** button refreshes the account balance for that account holder.

You can specify which fee schedule an organisation uses by selecting it from one of the two drop-down menus at the bottom right of the window.

From version 8.6.8, the WorkCover Online section will appear in the Account Holder window for all organisations. For more information, please see WorkCover Online.

In summary:

Patient account holders are assigned in the Patient Demographics window. Other organisations are added in Account Holders list (**Open > Account Holders**).

5.3.3 Medicare and DVA Account Holder Records

The account holder records for Medicare and DVA are special cases. They should already be present in the Account Holders list. The naming of these records is important. They must be named exactly 'Medicare' and 'Dept of Veterans Affairs', respectively. Note that there is no full-stop after 'Dept', and no apostrophe in 'Veterans'.

When Genie is launched, it searches for these two records, and stores their unique Account ID numbers in Practice Preferences, as shown below.



Note: You must not change the names of these two records, nor create new account holder records with the same name.

Whenever you send an invoice to either of these records, they are automatically batched and a DB4 form is printed instead of an ordinary invoice. If you would like to print a DB4 form, make sure you have *Medicare DB4* selected in Printing Preferences (**File > Printing Preferences**).

If you would like to send an ordinary invoice to the Dept of Veterans Affairs, you must create a new account holder record and name it anything **BUT** 'Dept of Veterans Affairs' (e.g. DVA Reports).

When you would like to invoice to this account, click on the **Other** button in the Invoice window and search for this record (see [Invoicing an Organisation](#) for more information).

5.3.4 Creating an Invoice

Invoices can be created from several places:

1. The Appointment Book
2. The Patients list
3. The Account Holders list
4. From within a Procedure record (based on the quote).

Creating an Invoice from the Appointment Book

Highlight the patient you would like to invoice in the Appointment Book.

Then either select **Billing > Invoice** or click on the **Invoice** icon , or right-click on the appointment, and select the *Invoice* option.

[illegible]

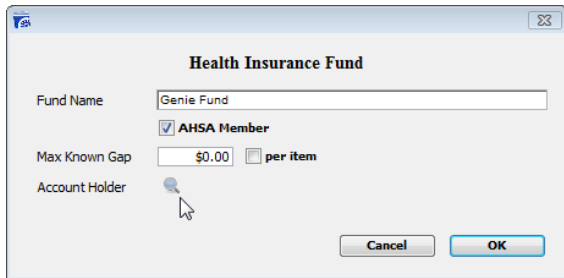
Note: The *Created by* and *Created Time* fields were introduced in Genie version 9.0.2. For invoices created prior to updating to Genie 9.0.2, the *Created by* field will read *Not Recorded* and the *Created Time* field will be *00:00*.

Self	Bulk Bill	DVA	Work cover	Other	BUPA
------	-----------	-----	------------	-------	------

If the account is directed to **DVA**, and the number of kilometres travelled is specified, a further option is available to specify the *Treatment Location*. There will be a choice of *Hospital* or *Home* if there is a value in *Distance Travelled*, and the account type is **DVA**.

The **Workcover**, **Other**, and **Health Fund** button will need to be selected manually accordingly.

If you are billing to a health fund, the health fund will need to have an account holder. If you attempt to bill a health fund without a corresponding account holder, you will be asked if you would like to add one now. Alternatively, an account holder record can be created or attached to a health fund by going into **Open > Billing Items** and clicking on the **Health Funds** button. Double-click on the health fund of interest, and click on the magnifying glass beside *Account Holder*. This will then allow you to search for the corresponding account holder, or create a new one for that health fund.



Health Insurance Fund

Fund Name: Genie Fund

☒ AHSA Member

Max Known Gap: \$0.00 ☐ per item

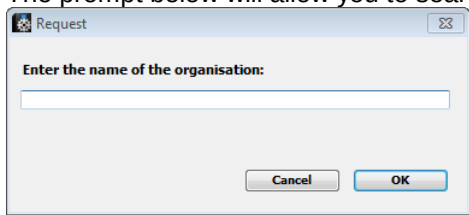
Account Holder: [magnifying glass icon]

Cancel OK

5.3.5 Invoicing an Organisation

If you would like to send an ordinary invoice to DVA, or another organisation (such as an insurance company), click on the **Other** button when you raise a new invoice.

The prompt below will allow you to search for the account holder to whom you would like to send the invoice.



Request

Enter the name of the organisation:

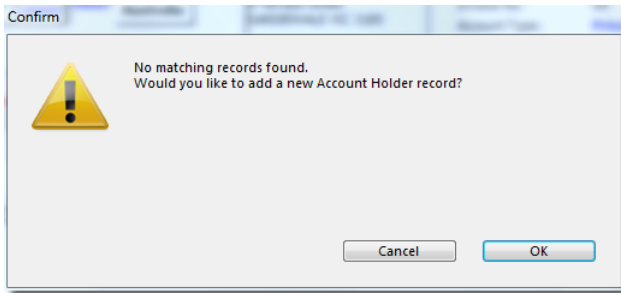
[text input field]

Cancel OK

Enter the first few letters of the account holder's name and click **OK**.

If you click on the **Health fund** button, the above step is skipped and Genie makes the account out to the health fund (as selected in Patient Demographics) provided there is an account holder record for it.

If a matching record is not found for either of the scenarios above, Genie will ask whether you would like to add a new account holder record.



Once the correct account holder is selected, proceed to [Adding Items to an Invoice](#).

Creating a Non-Patient Invoice

If you would like to invoice an organisation for a non-patient related service, you can do this through **Open > Account Holders**. In here, search for the organisation you would like to bill, highlight it, and then navigate to **Billing > Invoice**. This will present you with a simplistic invoice that you are able to add items to. If you would like to invoice the organisation for a custom item number, you can create this in the Billing Items List by clicking on the **Blue plus** icon  .

[illegible]

5.3.6 Invoicing Workcover

There are two ways of invoicing Workcover.

1. Using the 'Other' button

This method is often used if the doctor does not use the Workcover Claim module in the clinical notes.

You will be prompted to select the organisation to bill. Once this is selected, you have two options as to where to enter the claim number for the claim being invoiced.

If its a claim that is not likely to be billed very often then when you add the item to the invoice you can just manually enter the Claim Number into the *Notes* field.

Alternatively, if you would like a more permanent record of the claim number, you can create a Current Problem record, by clicking on the **Blue plus** near Current Problems in the Clinical Window, and enter the Claim Number in the *Notes* field of the Current Problem record, using the **Paperclip**  to the right of the *Notes* field.

Press the Return key to save this item

STATE, Samantha

Provider:

Item No: No. of Patients Seen: Qty:

Description: Professional attendance by a specialist in the practice of his or her specialty where the patient is referred to him or her each attendance subsequent to the first in a single course of treatment where that

☐ Description for this Invoice item ONLY

Amount:

Discount:

Any discount is subtracted from the GST inclusive price.

☐ Use Private Fund Schedule

Private Fund:

Service Date:  *CTRL-P*

Service Time:

☐ Inpatient Services *CTRL-I*

Note:

Time Spent: minutes

Field Quantity:

Fee Schedule:

Schedule	\$42.20	AMA	\$0.00
Rebate	\$35.90	Private	\$45.50
IP Rebate	\$31.65	HCC	\$0.00
DVA GP	\$42.80	PMS	\$0.00
DVA SP Out	\$57.00	Custom 1	\$0.00
DVA SP In	\$58.25	Custom 2	\$0.00
Workcover	\$84.00	Custom 3	\$0.00

Buttons: Cancel, Search Fee Schedule, Save

This will display a list of all the Current Problems for the patient, allowing you to select the relevant problem for this visit.

Select the problem to insert...

Problem

Head Injury

Buttons: Cancel, Select

This will automatically insert the problem and the Claim Number in the *Notes* field of the item.

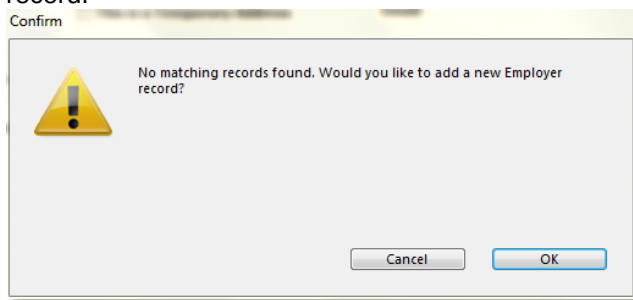
2. Using the Workcover button

Note: An employer **MUST** be added for this method to work. If you do not know the employer, you can create an employer with the same name as the insurer.

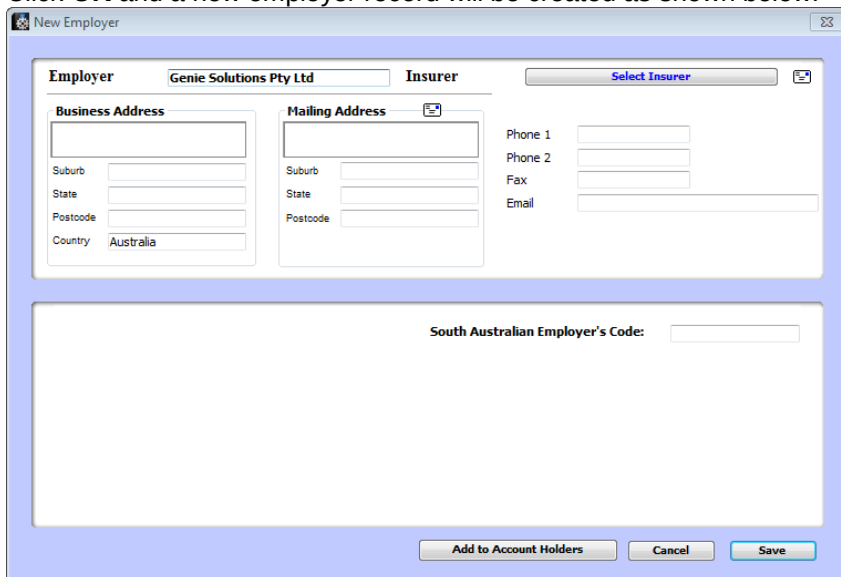
This is done from within the Patient Demographics, in the **Secondary** tab.

Click on the **Blue plus** button  to search the Employers table.

If a matching record for the employer is not found, you will be asked if you would like to create a new employer record.



Click **OK** and a new employer record will be created as shown below.

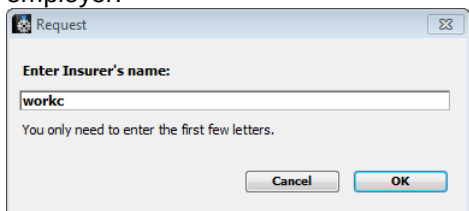
A screenshot of the "New Employer" form. The "Employer" field is filled with "Genie Solutions Pty Ltd". The "Insurer" field has a "Select Insurer" button. Below are sections for "Business Address" and "Mailing Address", each with fields for Suburb, State, Postcode, and Country (pre-filled with "Australia"). To the right are fields for Phone 1, Phone 2, Fax, and Email. At the bottom is a large field for "South Australian Employer's Code:". At the very bottom are three buttons: "Add to Account Holders", "Cancel", and "Save".

Fill in the Employers details.

If you plan to invoice the actual employer at any stage, click on the **Add to Account Holders** button to automatically create a record in the Account Holders table. If an account isn't created for the employer, the employer's details will still be held in the employers table ([Open > Employers](#)).

You then need to assign the insurer for this employer, if known. Click on the **Select Insurer** button.

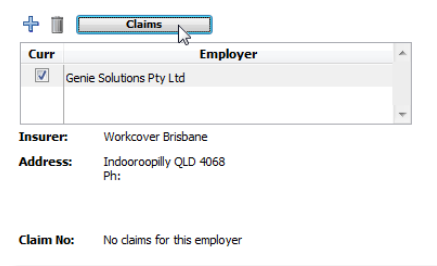
This allows you to search the Account Holders table for the organisation providing Workcover insurance to this employer.

A small dialog box titled "Request" with a search icon. It contains the text "Enter Insurer's name:" followed by a text input field containing the word "workc". Below the input field is the text "You only need to enter the first few letters." At the bottom are two buttons: "Cancel" and "OK".

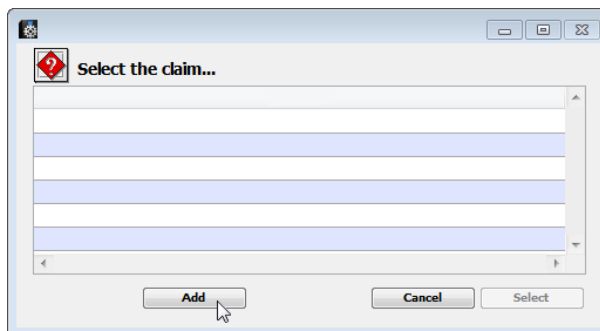
If no matching record is found, you will be asked if you would like to create an account holder record for the insurer.

Once you have assigned the insurer, save the employer's record. The next time you see an employee of this organisation, all you will have to do is assign the employer to the patient; Genie will presume the same insurer is applicable.

The next step is to create a Workcover claim in the patient's Clinical Window. This is done using the **Claims** button in the Employers area of the Patient Demographics window. Claims can also be added in the Clinical Window by the doctor, through the [Tools](#) menu, except where the Practice Type is set to Obstetrics or Anaesthetics.



OR



Click **Add** and a new claim window will open as shown below.

Enter the *Date* and *Time*, the *Injury* and *Cause* and the *Claim Number*, if known. If an Employer has not already been assigned to the patient, you can do this from this window by clicking on the **Select Employer** button. Genie will not allow you to save this until you have selected an employer.

If a case manager has been assigned to this claim, you can add them by using the **Search Case Manager** icon and searching your Address Book for the relevant person. If you have not added this person to the Address Book, click **OK** and a prompt will appear asking if you would like to **Add** this person to your Address Book. Once added to this record, the case manager's email, phone, and fax details will be displayed in this window. You can also edit their Address Book record from this window by clicking the **Edit Case Manager** icon.

Note: Once you have created a Workcover Claim, you cannot delete it from the Select a Claim window. If you need to delete this, you must locate this claim in the patient's Clinical Window and click the **Delete** icon above the Contact List to delete the claim.

Once you have assigned an employer and created a claim, you can click on the **Workcover** button in the New Invoice window.

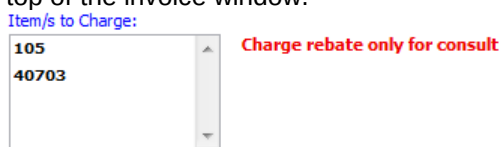


You will be asked to select the injury to which this invoice relates, in case the patient has several claims in process.

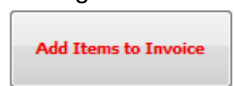
5.3.7 Adding Items to an Invoice

Once you have determined which patient or organisation is going to be responsible for the invoice, you can add the item(s) to it.

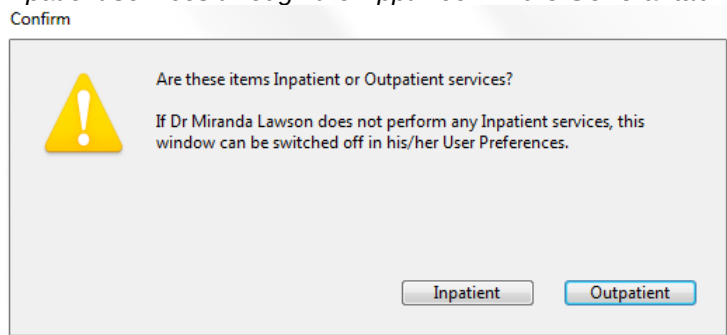
If the invoice has been created from the Appointment Book, and the doctor has specified the item numbers to charge (see [Specifying a Fee to Charge](#)), there will be items and messages listed in the *Item(s) to Charge* box at top of the invoice window.



If any of these items do not need to be added to the invoice, they should be removed from this box by double-clicking on them before clicking the **Add Items to Invoice** button.



When you click on the **Add Items to Invoice** button you may be prompted regarding Inpatient or Outpatient services. If this is not relevant, it can be turned off in the doctor's User Preferences by ticking the '*I do not bill inpatient services through the Appt Book*' in the **General** tab.



The fee that is entered is based on which account type is specified in the Patient Demographics window. If it needs to be changed, you are able to simply click into the fee field and change it. In this example we could change the procedure fee to be the rebate amount as specified in the message in red.

New Invoice

Self Bulk Bill DVA Work cover Other BUPA

Miss Cecilia CLINTON
122 Stanely Tce
TARINGA QLD 4068

Account Type: Private
Private Fund: BUPA

Invoice Date: 09/12/2016
Invoice No: 374

Item/s to Charge:

Charge rebate only for consult

Add Items to Invoice

Referring Doctor: Dr Chuck B Kirkmann (09/12/...)

Distance Travelled: kms

Practice Name: Brisbane Genie

Site of Service: Genie Medical Centre

Patient Claims: Always

☒ Use Patient Claims

Apply Multiple Item Rule

Apply DIMSR

Add Known Gap

Date	Patient Name	Provider	Item No	Description	Rebate	Fee	Discount	GST
09/12/2016	CLINTON, Cecilia	Dr Miranda Lawson	105	Professional attendance by a s...	\$43.00	\$43.00	\$0.00	
09/12/2016	CLINTON, Cecilia	Dr Miranda Lawson	40703	Cortectomy, topectomy or p...	\$1,466.30	\$1,539.50	\$0.00	

Gap: \$73.20

Opening Account Balance: \$0.00

GST Component: \$0.00

Total for this Invoice: \$1,582.50

Closing Balance: \$1,582.50

Payment: 0

Invoice Memo: Default

☐ Pays Gap Only

Cancel Include Asst's Fee Invoice as Asst. Apply Deposit Defer Print

If you do not know the fee, you can double-click on the item which will bring up the item window with all the fees listed at right. Clicking on the fee you would like will replace the current fee with this.

Enter the item number and press the Tab key

CLINTON, Cecilia

Provider: Dr Miranda Lawson

Item No: 40703 No. of Patients Seen: 0 Qty: 1

Description: Cortectomy, topectomy or partial lobectomy for epilepsy (Anaes.) (Assist.)

☐ Description for this Invoice item ONLY

Amount: \$1,539.50

Discount: \$0.00

Any discount is subtracted from the GST inclusive price.

☐ Use Private Fund Schedule CTRL-P

Private Fund: BUPA

Service Date: 09/12/2016

Service Time: 2:15 PM

☒ Inpatient Services CTRL-I

Note: Inpatient

Time Spent: 0 minutes Medicare requires 15 minute increments.

Field Quantity: 0

Cancel Search Fee Schedule Save

Schedule	AMA	Private	HCC	PMS	Workcover	Custom 1
\$1,466.30	\$4,110.00	\$1,539.50	\$0.00	\$0.00	\$4,215.00	\$0.00
Rebate	IP Rebate	DVA GP	DVA SP Out	DVA SP In		
\$1,099.75	\$1,099.75	\$1,686.25	\$0.00	\$2,011.15		

Right-click or click and hold to display menu of Custom Fees

If you would like to add another item other than those specified in the *Item(s) to Charge* box, or the doctor has not specified the item(s) to charge, click on the **Add Item to Invoice** button to open a new item window like the above. Enter the item number and press **Tab**. Genie will insert the appropriate fee for the account type of the patient, depending on what is specified in the Patient Demographics, i.e. Private, AMA, Schedule etc. If the fee that populates is not the fee you would like to charge this time, simply click on the desired fee in top right of this window. If you do not want to charge any of these predetermined fees, you can highlight and replace the fee in the *Amount* field.

If any items require the *No. of Patients Seen* to be entered (such as hospital or home visits), you can enter this in the field to the right of the item number. Similarly, if the item requires multiple quantities, these can be entered in the *Quantity* field. This prevents you from having to enter the same item number multiple times.

Note: when using Quantities, the Amount field will still display the amount per item not the total amount for all quantities.

Once you are done, click on the **Save** button to add the item(s) to the invoice.

Inserting Private Fees on the Fly

When you first start using Genie, the items in the Billing Items List will only have the *Medicare Schedule* and *Rebate* fees filled in.

You can open the Billing Items List (**Open > Billing Items**) and insert your own private fees/descriptions at any time, however you can also do this as you are creating invoices.

In the new item window note that the various fees are displayed on the right-hand side of this window.

Schedule	\$1,466.30	AMA	\$4,110.00
Rebate	\$1,099.75	Private	\$1,539.50
IP Rebate	\$1,099.75	HCC	\$0.00
DVA GP	\$1,686.25	PMS	\$0.00
DVA SP Out	\$0.00	Workcover	\$4,215.00
DVA SP In	\$2,011.15	Custom 1	\$0.00

You can click into these fields and enter your usual private fees. These will be saved so that the next time you invoice this item the appropriate fee will be automatically inserted.

Similarly, you can change the text in the *Description* field either permanently by editing as appropriate and saving the invoice, or just for this item by ticking the *Description for this Invoice item ONLY*.

Note: If you cancel the invoice, none of the above changes will be saved.

5.3.8 Other Item Information

You may sometimes need to modify or include extra information for the item.

If the patient has a valid private health fund, the *Use Private Fund Schedule* tick box will be enabled. Clicking on this tickbox will insert the fund's fee for this particular item.

Service Date

If you are invoicing for a service which occurred on a different day, you should change the *Service Date* to the correct date.

Service Time

The *Service Time* is automatically taken from the Appointment time. If the *Service Time* is significantly different and it is important that it be recorded correctly (e.g. for a second visit on the same day), you must manually change the time of the service.

If the service was an inpatient service then the *Inpatient Services* tickbox should be ticked. This will change the rebate and gap amount to reflect the 75% Schedule Inpatient Rebate.

Notes

The *Notes* field prints on invoices and DB4 claim forms, and is transmitted through HIC Online. The most common uses for this field are Workcover claim numbers, second visit on same day details, inpatient details, an operative assistant's name and provider number, or noting whether the item is 'not normal aftercare'.

Time Spent

The *Time Spent* field does not have to be completed unless you have a specific need to record this. Medicare requires this figure to be entered in increments of 15 minutes.

Medicare Online Over-rides

If you are using Medicare Online, you will need to ensure that the appropriate over-rides are selected. These options will appear when adding an item if you have selected *Medicare* or *DVA* at the top of the invoice, or if you are sending the invoice as a *Patient Claim*.



Medicare Online Over-rides

☐ Not Normal Aftercare

Restrictive Override

- ☐ Separate Sites
- ☐ Not Related
- ☐ Not for Comparison
- ☒ None

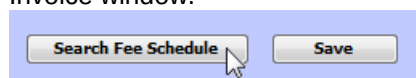
Reason for No Referral

- ☐ Lost
- ☐ In Hospital
- ☐ Emergency
- ☐ Not Required

These should all be self-explanatory, however it is important to mark these appropriately or your claims may be rejected (see the [Using Medicare Online](#) section of this manual for more information).

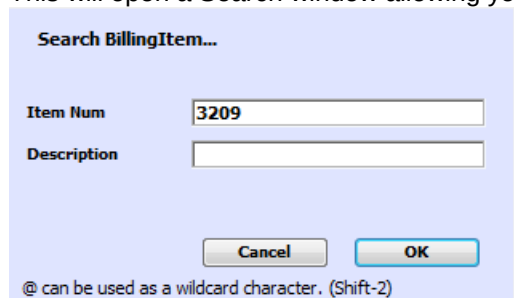
5.3.9 Searching the Fee Schedule

If you are unsure of which item number to charge, you can search Billing Items (**Open > Billing Items**) for an appropriate item number by clicking on the **Search Fee Schedule** button at the bottom of the Add Item to Invoice window.



Search Fee Schedule Save

This will open a Search window allowing you to search on either the item number or description.



Search BillingItem...

Item Num

Description

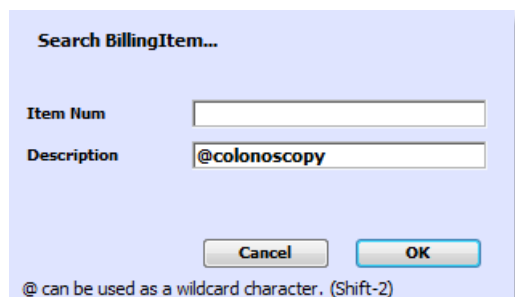
Cancel OK

@ can be used as a wildcard character. (Shift-2)

As an example, you would like to invoice a colonoscopy; you can't remember the exact item number, but you know that it starts with the numbers '3209'. You can enter '3209' in the Item field of the Search window, this will list all items beginning with '3209'.

If you do not know the item number at all, you can search for a word that you believe will be included in the description. In this case, we search for the word 'colonoscopy'. If you simply enter 'colonoscopy', into the *Description* field, Genie will search Billing Items for a record where the *Description* field starts with 'colonoscopy' – this is unlikely to find anything.

Instead, you are able to use the wildcard character, '@', before the word 'colonoscopy'. When you search, the wildcard character can represent any one, or many characters. By searching for '@colonoscopy', Genie will look for a billing item with 'colonoscopy' anywhere in its description.



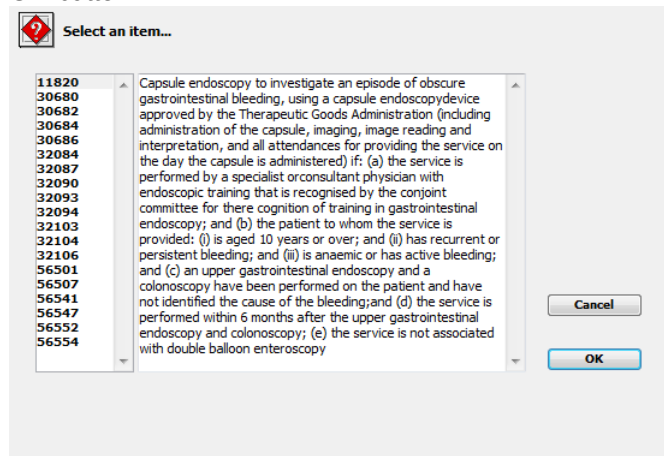
Search BillingItem...

Item Num:

Description:

@ can be used as a wildcard character. (Shift-2)

In this particular case it finds many matching records, select the item you would like to invoice and click on the **OK** button.



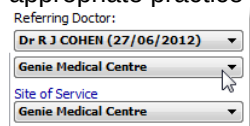
Select an item...

11820	Capsule endoscopy to investigate an episode of obscure gastrointestinal bleeding, using a capsule endoscopy device approved by the Therapeutic Goods Administration (including administration of the capsule, imaging, image reading and interpretation, and all attendances for providing the service on the day the capsule is administered) if: (a) the service is performed by a specialist or consultant physician with endoscopic training that is recognised by the conjoint committee for their cognition of training in gastrointestinal endoscopy; and (b) the patient to whom the service is provided: (i) is aged 10 years or over; and (ii) has recurrent or persistent bleeding; and (iii) is anaemic or has active bleeding; and (c) an upper gastrointestinal endoscopy and a colonoscopy have been performed on the patient and have not identified the cause of the bleeding; and (d) the service is performed within 6 months after the upper gastrointestinal endoscopy and colonoscopy; (e) the service is not associated with double balloon enteroscopy
30680	
30682	
30684	
30686	
32084	
32087	
32090	
32093	
32094	
32103	
32104	
32106	
56501	
56507	
56541	
56547	
56552	
56554	

The selected item number will be inserted into the *Item* field of the new item window.

5.3.10 Selecting the Practice

Genie allows you to invoice from multiple practices by allowing multiple Practice Preferences, each with their own address and letterhead (see [Practice Preferences](#)). If you bill from multiple practices, you should select the appropriate practice from the drop-down menu after adding items to an invoice.



Referring Doctor:

Dr R J COHEN (27/06/2012)

Genie Medical Centre

Site of Service

Genie Medical Centre

This will insert the appropriate practice letterhead on the invoice. If you only have one Practice Preference record, you can ignore this drop-down menu.

5.3.11 Selecting the Site of Service

Below the *Practice* drop-down menu is the *Site of Service* drop-down menu.

This menu is unique to each provider in a practice. It is based on the practice sites specified in each provider's User Preferences (see [The Practice Sites Tab](#)). It is used when a provider has multiple different provider numbers for different practice sites.

This menu has no effect on the letterhead printed on the invoice. It does however change the Site of Service, and Provider Number printed on invoices, DB4s, and electronically transmitted claims.

Having separate practice sites is also useful for tracking income earned at these individual sites. If you have the same provider number at every site, it is recommended that you consider having several practice sites for this reason. A breakdown of these individual sites can be viewed in the Billing Vs Income Report by going into **File > Maintenance & Reports, Practice Analysis** tab, **Billing Vs Income**.

5.3.12 Multiple Procedure & Diagnostic Rules

Multiple Procedure Rules

When multiple procedural items are added to an invoice, Genie allows you to apply the Multiple Procedure Rule (MPR) to the items.

Items the MPR apply to should already be marked as such in Billing Items, as shown below.

Item Number	31270	MBS Group	T8	Category	Procedures	31270	
Basal cell carcinoma or squamous cell carcinoma (including keratocanthoma), removal from face, neck, (anterior to the sternomastoid muscles) or lower leg (mid calf to ankle), tumour size more than 10mm and up to and including 20mm in diameter and where removal is by therapeutic surgical excision (other than by shave excision) and suture, where the initial specimen removed is sent for histological examination and malignancy confirmed, and any subsequently excised specimen is sent for histological examination (Anaes.)				Usual Time (mins)	0	Anaes. Units	0
				☐ Assistant Billable			
				☐ Display in List of Commonly Used Items	☐ Manage Stock		
				☒ Multiple Procedure Rule Applies to This Item			
				☐ This Item Includes GST in the Price			
				☐ Always an Inpatient Procedure			

The *Multiple Procedure Rule Applies to This Item* tickbox is automatically ticked when importing the Medicare Schedule. If it does not appear to be working correctly, you should open the item's record (**Open > Billing Items**), by double-clicking on this in the list and checking that this box is ticked.

When invoicing procedures, you should enter the full fee for each item. When the second procedural item has been added, a new button will appear on the invoice window, as shown below.

Add Item to Invoice Delete Item		Referring Doctor: Dr R J COHEN (02/11/2012 L... Practice Name: Genie Medical Centre Site of Service: Genie Medical Centre	Distance Travelled: kms	Patient Claims Always ☒ Use Patient Claims Apply Multiple Item Rule Apply DIMSR				
Date	Patient Name	Provider	Item No	Description	Rebate	Fee	Discount	GST
02/11/2012	STATE, Samantha	Dr Andrew Largemar	31270	Basal cell carcinoma or squamo	\$215.45	\$273.50	\$0.00	
02/11/2012	STATE, Samantha	Dr Andrew Largemar	31280	Basal cell carcinoma or squamo	\$130.05	\$165.00	\$0.00	

Continue adding all the items to the invoice. When you are finished, click on the **Apply Multiple Item Rule** button.

Genie will work from the most expensive item down applying the multiple procedure rule.

Note: The rule is applied top to bottom according to the Medicare Schedule fees, NOT your private fees. If your private fees are disproportionate to the Medicare fees, you may find this working in a different way than you expected.

Add Item to Invoice Delete Item		Referring Doctor: Dr R J COHEN (02/11/2012 L... Practice Name: Genie Medical Centre Site of Service: Genie Medical Centre	Distance Travelled: kms	Patient Claims Always ☒ Use Patient Claims Apply Multiple Item Rule Apply DIMSR				
Date	Patient Name	Provider	Item No	Description	Rebate	Fee	Discount	GST
02/11/2012	STATE, Samantha	Dr Andrew Largemar	31270	Basal cell carcinoma or squamo	\$215.45	\$273.50	\$0.00	
02/11/2012	STATE, Samantha	Dr Andrew Largemar	31280	Basal cell carcinoma or squamo	\$65.05	\$82.50	\$0.00	

You can specify which MPR to apply when billing an Organisation from the Account Holders list (**Open > Account Holders**).

Multiple Procedure Rule to Employ:
(100/50/25 used if nothing is selected)

100/50/25

The order the items are entered in does not matter; Genie will still work from the most expensive item down to the least expensive item. It is important that you enter all items with their full fees before clicking on the **Calculate Multiple Procedures** button.

Note: If you are entering multiple procedural items that took place on different days, Genie will calculate each day's items separately. This negates the need to create separate invoices for each day.

Diagnostic Rules

If the DIMSR (Diagnostic Imaging Multiple Service Rule), or MVUSSR (Multiple Vascular Ultrasound Services

Site Rule) apply to your items, a **DIMSR** or **MVUSSR** button will appear.

Date	Patient Name	Provider	Item No	Description	Rebate	Fee	Discount	GST	
02/11/2012	STATE, Samantha	Dr Andrew Largemar	55028	Head, ultrasound scan of, if: (i	\$92.75	\$120.00	\$0.00	☐	
02/11/2012	STATE, Samantha	Dr Andrew Largemar	55028	Head, ultrasound scan of, if: (i	\$92.75	\$120.00	\$0.00	☐	

Apply Multiple Item Rule

DIMSR (A)

Click on this, and the appropriate rule will be applied to the billing items.

5.3.13 Known Gap Amounts

When billing the private health fund directly for surgery accounts, you can apply a fixed gap amount by using the **Add Known Gap** button. This will assign a fixed gap amount across the items on the invoice.

New Invoice

Self Bulk Bill DVA Work cover Other **BUPA Australia**

BUPA
91 Adelaide Street
BRISBANE QLD 4000

Account Type: **Private**
Private Fund: **BUPA Australia**

Invoice Date: 02/11/2012
Invoice No: 136

Item/s to Charge:

Referring Doctor: **Dr R J COHEN (02/11/2012 t...** Distance Travelled: kms

Known Gap

BUPA Australia

Maximum Known Gap

☐ The Maximum Gap is Per Item

Cancel OK

Description	Rebate	Fee	Discount	GST
Corticectomy, topectomy or pe	\$2,563.50	\$2,563.50	\$0.00	☐

Gap: **\$0.00**
☐ Pays Gap Only

GST Component: \$0.00
Total for this Invoice: \$2,563.50
Payment:

Apply Multiple Item Rule
Apply DIMSR
Add Known Gap

Include Asst's Fee Invoice as Asst. Apply Deposit Defer Print

Alternatively, you can charge your own private fee, Genie will then calculate the gap and display it in the gap field.

The Maximum Known Gap can be entered in the health fund's record in the health funds list. This is accessed by going into **Open > Billing Items**, and clicking on the **Health Funds** button. Double-click on the health fund's name:

Health Insurance Fund

Fund Name

☐ AHSA Member

Max Known Gap ☐ per item

Account Holder
91 Adelaide Street
BRISBANE QLD 4000

Cancel OK

Enter the *Max Known Gap* and click **OK**.

Note: The Max Known Gap will need to be obtained directly from the individual health funds. Genie Solutions does not have access to this information.

5.3.14 Assistant's Fees

Include Assistant's Fee

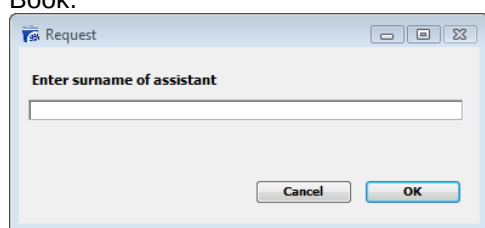
Genie allows you to add an assistant's fee to an invoice by clicking on the **Include Assistant's Fee** button.



Provisos:

- The *Assistant Threshold* must be set in **Open > Billing Items**
- At least one of the items on the invoice must include the text '(Assist)' in the Description field, or have *Assistant Billable* ticked in the Billing Items record.
- If you add your own item numbers which you would like to attract an assistant's fee, it is important to tick *Assistant Billable* in the Billing Items record.
- The assistant must have a record in your Address Book (see [The Open Menu](#) Chapter).

When you click on the **Include Assistant's Fee** button you will be asked to find the provider in the Address Book.



Enter the first few letters of the assistant's name, then press **OK** to search the Address Book and select the assistant.

Once you have selected the assistant, the window below will appear asking which method of fee calculation you would like to use for the assistant.



The choices are: *One Fifth of Surgeon's Fee*, the *Medicare Schedule*, the *DVA Inpatient* fee, the *Private Fund Fee* (if the patient is privately insured and you have imported the fund's schedule, see [Updating Fee Schedules](#)), or your own private fee.

Select the fee to charge and click **OK**.

If the fee field for the *Private Fund Fee* is zero, the most likely cause is that there is no fee percentage (% Fee) entered for item 51303 in **Open > Billing Items**.

Health Funds

Health Fund	AHSA Member	Fee	% Fee
AXA	☐	\$0.00	1.44897
BUPA	☐	\$0.00	1.54086
GMHBA	☐	\$0.00	1.42342
HBA	☐	\$0.00	1.44897

The fee percentage should be imported for most of the funds automatically, however, you may need to manually add the percentage in some cases. If this is the case, contact the fund directly for these figures as Genie Solutions does not have this information.

Invoice as Assistant

The **Invoice as Asst.** button is used when a doctor in your practice has acted as an assistant for a procedure and needs to create their own invoice for this.

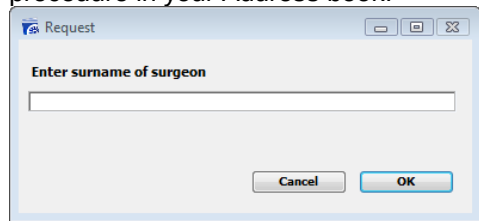


You will first need to generate the invoice as normal, adding only the surgical items.

Provisos:

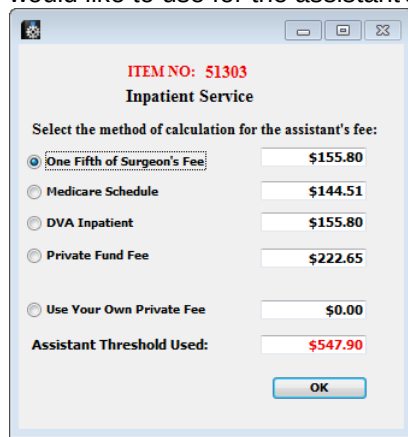
- The Assistant Threshold must be set in the **Open > Billing Items** window
- At least one of the items on the invoice must include the text '(Assist)' in the *Description* field, or have *Assistant Billable* ticked in the Billing Items record.
- If you add your own item numbers which you would like to attract an assistant's fee, it is important to tick *Assistant Billable* in the Billing Items record.
- The surgeon who performed the procedure must have a record in your Address Book (see the [Open Menu Chapter](#)).

When you click on the **Invoice as Asst.** button, you will be asked to search for the surgeon who performed the procedure in your Address book.



Enter the first few letters of the surgeons name and press **OK** to search the Address Book and select the surgeon.

Once you have selected the Surgeon, the window below will appear asking which method of fee calculation you would like to use for the assistant's fee.



These choices are the same as when Including an Assistant's Fee (see [Including Assistant's Fee](#) above).

Select the fee to charge and click **OK**.

You will notice that the procedural item numbers have been replaced in the invoice by either item number 51300 or 51303, depending on the aggregate fee of the procedure item numbers.

New Invoice

Self Bulk Bill DVA Work cover Other BUPA Australia

Miss Samantha STATE
9 Terrace Street
GARDENVALE VIC 3185

Account Type: Private
Private Fund: BUPA Australia

Invoice Date: 02/11/2012
Invoice No: 138

Item/s to Charge:

Referring Doctor: Dr R J COHEN (02/11/2012 t... Distance Travelled: kms

Practice Name: Genie Medical Centre

Site of Service:

Date	Patient Name	Provider	Item No	Description	Rebate	Fee	Discount	GST
02/11/2012	STATE, Samantha	Dr Andrew Largemar	51303	Assistance at any operation id	\$144.55	\$155.80	\$0.00	

Invoice Memo: Default

Gap: \$11.25

Opening Account Balance: \$2,396.05
GST Component: \$0.00
Total for this Invoice: \$155.80
Closing Balance: \$2,551.85
Payment: 0

Buttons: Cancel, Include Asst's Fee, Invoice as Asst., Apply Deposit, Defer, Print

The surgeon's name, provider number (if recorded in their Address Book entry), and the item number, will all be inserted into the Notes field in the invoice.

5.3.15 Invoice Memos

Genie provides the ability to insert a memo at the bottom of printed invoices. You are able to have as many invoice memos as needed.

Invoice Memo: Default

When the invoice window is opened Genie automatically inserts the default memo. You should leave the **Default Memo** blank, unless you would like a standard memo on every invoice.

To add a new memo, go to **File > Practice Preferences** and double-click the clinic name. Select the **Miscellaneous** tab, click on the drop-down menu at the bottom right of the window and select **Add**. Give the memo a name in the *Title* field, and enter the actual text in the *Memo* field.

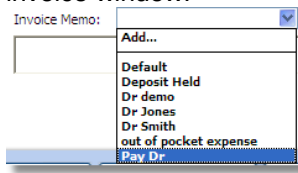
Invoice Memo

Title: Pay Dr

Memo: Please make any cheques payable to the providing doctor.

Buttons: Cancel, Save

If you would like to add this memo to an invoice, simply select it from the drop-down menu at the bottom of the invoice window.



To modify the wording of a memo, select it and simply change the wording in the memo field in the invoice window. Once you print the invoice your change will be saved.

For this reason, you can also modify invoice memos from within Practice Preferences (**File > Practice Preferences**) in the **Miscellaneous** tab, as shown below.



Note: An unneeded invoice memo can be deleted from the menu within Practice Preferences. Simply hold down the Alt key and click the memo you wish to delete, and the memo will disappear from the list.

5.3.16 Setting/Increasing Private Fees

Modifying Fees in Bulk

To set or increase private fee, or any custom fees you have added, navigate to **Open > Billing Items** and click Increase Fees.

Group	Item Num	Description	Private	Schedule	Bulk Bill	IP Rebate	GP Cons	DVA Out	DVA In
A3	104	Specialist, referred consultation - surg...	\$90.00	\$85.55	\$72.75	\$64.20	\$98.40	\$115.50	\$118.10
A3	105	Professional attendance by a specialis...	\$45.00	\$43.00	\$36.55	\$32.25	\$49.45	\$58.05	\$59.40

Please note: This will modify the selected fee for all currently-displayed items. To modify only a highlighted selection, navigate to **Records > Use Selected to limit the list to just those item numbers. To increase fees for one item only, see **Modifying a Single Item** below.**

Clicking the Increase Fees button will open the Fee Increase window below.

Increase Fees

Increase the fee for: **Private**

☐ By a Percentage by %
☐ By an Amount
☒ To a Percentage Above... %
☐ To an Amount Above...

☒ Schedule Fee ☐ AMA Fee

Round to nearest cents

Cancel **OK**

- The drop-down menu at the top of the window lets you select the schedule or account type you wish to increase/update.
- The first two radio buttons let you increase the selected fee by a set percentage or dollar amount, based on the current fee for each item.
- The other radio buttons let you increase the selected fee by a set percentage or dollar amount, based on the Medicare Schedule fee or the AMA fee for each item.
- The rounding field at the bottom allows you to set how Genie rounds the increased fees. To prevent Genie from rounding, enter '1' in this field.

If the **OK** button is inactive (greyed out), either you have not selected a schedule/account type or you have not defined the amount you wish to increase the fees by.

Modifying a Single Item

To set or increase a particular fee for a single item only, simply double-click that item in the Billing Items window to open the Editing Item window.

Please note: To ensure the integrity of your Medicare/DVA/ECLIPSE billing, you should only ever increase custom fees, such as Private fees, in this manner.

Editing Item 105

Item Number: 105 MBS Group: A3 Category: Consultations 105

Usual Time (mins): 15 Anaes. Units: 0

☐ Assistant Billable ☐ Manage Stock

☒ Display in List of Commonly Used Items

☐ Multiple Procedure Rule Applies to This Item

☐ This Item Includes GST in the Price

☐ Always an Inpatient Procedure

Add a Fund: Uninsured

AHSA	BUPA	Fund	Fee	% Schedule
☒	☐	ACA Health Benefits Fund	\$72.70	0
☐	☒	ANZ Health	\$51.95	0
☐	☐	Australian Health Management	\$55.60	0
☒	☐	Australian Unity	\$72.70	0
☐	☐	Budget Direct Health Insurance	\$51.60	0
☐	☒	BUPA	\$51.95	0
☒	☐	CBH Health Fund Ltd	\$72.70	0
☒	☐	Central West Health Cover	\$72.70	0
☒	☐	CUA Health	\$72.70	0
☒	☐	Defence Health	\$72.70	0
☒	☐	Druids Friendly Society	\$72.70	0
☐	☐	FIT Health Insurance	\$51.60	0
☐	☐	Frank Health Insurance	\$51.60	0
☐	☐	Garrison Health	\$66.69	0
☐	☐	GMIHBA	\$51.60	0

Add a Fee:

Type	Fee
Private	\$45.00
HCC	\$0.00
PMS	\$0.00
Schedule	\$43.00
Rebate	\$36.55
IP Rebate	\$32.25
Veterans Affairs	\$49.45
DVA Inpatient	\$59.40
DVA Outpatient	\$58.05
AMA	\$85.00
Workcover	\$87.00
AL	\$47.30
Custom 1	\$0.00
Custom 2	\$0.00
Custom 3	\$0.00

Navigation buttons: << < > >> Cancel Save

In the bottom-right, locate the fee/account type you wish to modify, and then slowly double-click on the dollar amount to edit it. Click **Save** to store the new fee.

For more information on modifying billing items in this window, please see the [Adding and Editing Billing Items](#) section.

Importing the AMA Schedule

To import the AMA fee schedule, you will first need to download the schedule in .CSV format from the AMA website. Then, follow the instructions in our [Updating AMA Fees](#) PDF guide. If using the paper version of this manual, you can access this guide within Genie via **Special > Software Updates > PDFs**.

5.3.17 Adding and Editing Billing Items

If you would like to add custom items, i.e. items that are not part of the Medicare Benefits Schedule (for medical reports, cosmetic products, etc), this can be done through **Open > Billing Items** by clicking on the  icon. Clicking this will open the *Add New Billing Item* window, allowing you to create the new item. This window will also open for existing items when they are double-clicked within the Billing Items list.

Fill out the *Item Number* field for the item. This does not necessarily need to be an actual number, but simply the characters you would like to use to quickly search for that item when invoicing.

The *MBS Group* field applies to MBS items only and will be populated automatically for downloaded MBS items.

Below the *Item Number* field is the *Description* field. Enter a description for the new item you are creating. Be as brief or specific as you need to in order to clarify what the item is for anyone who may need to bill it.

The list of health fund fees in the lower-left of the window will, for the most part, only apply to MBS items that may be claimed to health funds.

The checkboxes in the upper-right of the window dictate how the item is billed:

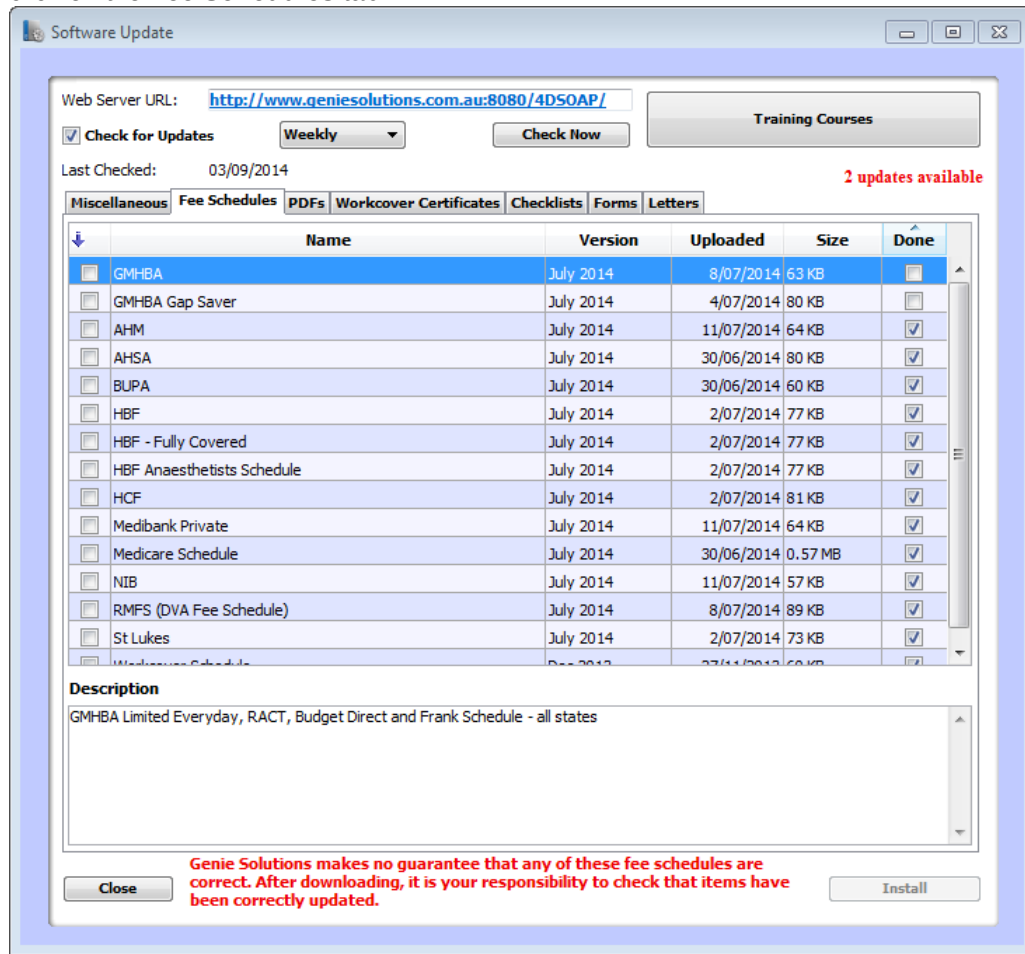
- The *Assistant Billable* checkbox allows a surgical assist fee to be calculated for the item. For more information about assistant billing, see the [Assistant's Fees](#) section.
- Ticking *Display in List of Commonly Used Items* will display the item for quick selection when adding an item to an invoice. It will also include the item in the list of Item(s) to Charge that appears when saving out of a patient's clinical record.
- The *Manage Stock* checkbox marks the item as stock, allowing it to be managed in the Stock Control module.
- *Multiple Procedure Rule Applies to This Item* specifies whether this item is to be factored into [Multiple Procedure Rule](#) calculations.
- If *This Item Includes GST in the Price* is selected, the appropriate percentage of the fee will be designated as GST every time this item is invoiced.
- If *Always an Inpatient Procedure* is ticked, the *Inpatient* checkbox for the item will be ticked by default whenever it is added to an invoice.

The table in the lower-right is where you will set the fee(s) for the item. To modify a specific fee, slowly double-click in the Fee column to make the dollar amount editable.

Please note: When specifying a fee for a custom item, ensure that you take into account the *This Item Includes GST in the Price* tickbox. If it is ticked, the fee entered should be GST-inclusive, and vice-versa.

5.3.18 Updating Fee Schedules

To update the Medicare, DVA or health fund fees, go to **Special > Software Updates** on any client machine and click on the **Fee Schedules** tab.



Tick the fee schedule(s) you would like to update and click on the **Install X Item(s)** button. You will be prompted as to whether you would like to **Apply Now** or to **Store and Activate Later**. You would usually select to **Apply Now**, unless you had a reason to postpone this until later (e.g. if your billing was not up to date).

Note: Fee schedules can be updated when others are using Genie but users must not perform any billing for the duration of the update.

5.3.19 Checking Appointments Have Been Billed

A patient who has been invoiced through the Appointment Book (using the **\$** icon) will have their appointment status changed to *Invoiced*, and will show the invoiced figure in the *Invoiced* column of the provider's appointment book tab. By default, this status is denoted by **blue** text. This allows you to see, at a glance, which patients have yet to be invoiced.

Note: If a patient is invoiced through the Patients list, their appointment's status will not change automatically.

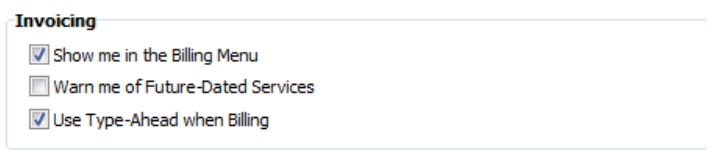
For a more thorough and reliable check of which patients still need to be invoiced for a given period, you can use the *Check Missing Invoices* function (**Appts > Check Missing Invoices**). This will allow you to locate all patients who haven't been invoiced for appointments over a specified date range, and this can be limited by specific providers.

5.3.20 Invoicing from the Patient List

If a patient needs to be invoiced, but doesn't have an appointment, this can be done from the Patients list ([Open > Patients](#)).

To do this, locate the patient's record in the Patients list and click it to highlight it. Navigate to [Billing > Invoice](#) to open the New Invoice window. You can then add items to the invoice as normal.

In a practice with multiple providers, Genie will not know who the servicing provider is by default, so this will need to be selected by the user before the invoice can be saved. For a user to appear in the *Provider* drop-down menu, they must first have *Show Me In The Billing Menu* ticked in the General tab of their User Preferences window (see [User Preferences](#)).



Invoicing	
☒	Show me in the Billing Menu
☐	Warn me of Future-Dated Services
☒	Use Type-Ahead when Billing

Note: When you select a Provider, their default item number (as specified in their User Preferences) is inserted automatically, but can be overwritten if necessary.

5.3.21 Deferring Invoices

Instead of immediately printing an invoice, you can defer it by clicking on the **Defer** button in the New Invoice window.

This will send the invoice to the Unpaid Invoices window. Unpaid Invoices can be found in the Monthly tab of [File > Maintenance & Reports](#), via the **Unpaid Invoices** button. Deferred invoices are printed individually, and only when you choose to print them. For example, consider a patient admitted to hospital on the 28th of the month and discharged on the 4th of the following month; you raise an invoice for each daily visit. In this situation, you can defer each invoice as its created. Then, when the patient is discharged, go back into Unpaid Invoices and print either a statement for the patient or each individual invoice. For more information on Unpaid Invoices, see the [Unpaid Invoices](#) entry in the Practice Management Section.

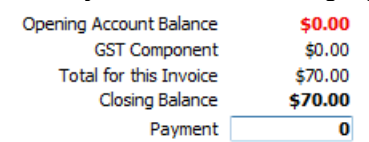
Deferred invoices can also be printed individually, using the **Printer** button  in the patient's Account History ([Billing > Account History](#)).

5.4 Receipting

The following section describes receipting individual invoices for patients and organisations. For information on receipting manual batches, see [Manual Batching](#). For how to receipt HIC Online claims, see [Using HIC Online](#).

5.4.1 Receipting Directly from an Invoice

After adding items to an invoice, you have the choice of printing, deferring, or receipting it. The *Payment* field will be highlighted as shown.



Opening Account Balance	\$0.00
GST Component	\$0.00
Total for this Invoice	\$70.00
Closing Balance	\$70.00
Payment	0

If the patient is paying immediately, simply type the payment amount in this field.

Note: There is no need to click the cursor in this field as it is already highlighted. You also don't need to enter zero cent amounts i.e. if the patient is paying \$72.00, you can type '72'; you don't need to type '72.00'.

Click on the **Receipt** button.

New Invoice

Self Bulk Bill DVA Work cover Other BUPA

Miss Samantha STATE
9 Terrace Street
GARDENVALE VIC 3185

Account Type: Private
Private Fund: BUPA

Invoice Date: 18/12/2015
Invoice No: 322

Item/s to Charge:

Add Item to Invoice

Referring Doctor: Dr R J COHEN (02/11/2012 L... Distance Travelled: kms

Practice Name: Brisbane Genie

Delete Item Site of Service

Date	Patient Name	Provider	Item No	Description	Rebate	Fee	Discount	GST
18/12/2015	STATE, Samantha	Dr Miranda Lawson	105	Professional attendance by a special...	\$36.55	\$70.00	\$0.00	

Apply Multiple Item Rule

Apply DIMSR

Add Known Gap

Invoice Memo: Default

Gap: \$33.45

Opening Account Balance \$0.00

GST Component \$0.00

Total for this Invoice \$70.00

Closing Balance \$70.00

Payment 70

Cancel Include Asst's Fee Invoice as Asst. Apply Deposit Defer Receipt

The Receipt window will open as shown.

Receipt: STATE, Samantha

Bank to: SMC Suncorp Bank

Miss Samantha STATE
9 Terrace Street
GARDENVALE VIC 3185

☐ Cash \$0.00
☐ Medicare Chq \$0.00
☐ Personal Chq \$0.00
☐ Fund Chq \$0.00
☐ Credit Card \$0.00
☒ EFTPOS \$70.00
☐ Dir Deposit \$0.00

Total: \$70.00

\$0.00 remains to be allocated

CTRL-A* Auto-Fill

Date	Invoice	Provider	Patient	Item	Fee	Discount	Balance	Payment	Remove
18/12/2015	322	Dr Miranda Lawson	STATE, Samantha	105	\$70.00	\$0.00	\$0.00	\$70.00	

Cancel Apply Deposit Store

Balance Owing: \$0.00 Print

Genie defaults to the receipt type selected in the **Miscellaneous** tab of Practice Preferences (**File > Practice Preferences** and double-click the clinic name). The amount paid will already be applied to the invoiced item(s). This automatic application works the same way as the Auto-Fill function. If there are several items and you are not receipting the full amount, Genie will allocate the payment to the first item number and work its way down until there is no more to be allocated.

If the patient is paying by the default receipt type, you can click on the **Print** button again to print the Invoice/ Receipt.

If the patient is paying by another means, such as cheque, click on the appropriate radio button e.g. *Personal Chq.*

The payment has now been moved to the *Personal Chq* field. Fill in the Cheque details. Entering the cheque number is not compulsory, however, it will appear on your Bank Deposit slip if entered. You can also split the payment e.g. if the patient pays part in cash and part via EFTPOS. In this case just type the relevant amount into each field.

You can also split the payment across payment types. For example, if the patient pays part in cash, and part in EFTPOS, you can simply type the respective amounts in each of these fields (see below).

Now click on the **Print** button to print the Invoice/Receipt.

Note: If you click on the Cancel button at this stage, only the Receipt is canceled. The Invoice has already been saved.

Troubleshooting

There are two possible causes for the **Print** button being disabled:

1. You haven't assigned a Bank code to the receipt, in the *Bank to* field in the top left corner of this window. Bank Accounts are created in **Open > Bank Accounts**. They can be assigned as the default account for individual doctors in their User Preferences (see [User Preferences](#)).
2. There is still money to be allocated as indicated in green text near the **Auto-Fill** button.

5.4.2 Receipting an Existing Invoice for a Patient

You can receipt a patient's outstanding accounts from either the Patients List or the Appointment Book, whichever is appropriate.

In either case find and highlight the patient, and select **Billing > Receipt** to open the Receipt window.

Note: If you know the invoice number of a specific invoice you wish to receipt, you can do so by selecting Billing > Receipt by Invoice Number.

[illegible]

The Receipt window will open as above, listing all outstanding items for the patient. Enter the total being paid in the appropriate payment type box in the top left, and if the patient is paying for all outstanding items, simply click on the **Auto-Fill** button to automatically allocate payment to all items. If the patient is not paying for all outstanding items, you must manually allocate each payment against the appropriate item by clicking in the *Payment* field. If the patient is making a part payment, slow double-click in the *Payment* field to enter less than the full amount.

If you would like to edit the fee of an item, you can do this by slow double-clicking in the *Fee* field. Alternatively, you can double-click on the item to open the Edit Item window and make adjustments accordingly. To make any edits in this window, first press the **Edit** button at the bottom of the window. Discounts can also be applied in this window, or in the previous receipt window.

If a patient would like to pay for an outstanding account, but also needs to be issued with another invoice, you should either:

Invoice and receipt them for today's consultation, and then receipt the previous week's,

or

Invoice them for today's consultation, and save the invoice un-receipted. You can then receipt today's and the previous week's with one receipt.

There is no way to invoice and receipt both debts in one step.

5.4.3 Paying the Gap

If the patient is only paying the gap, enter the gap payment amount, as indicated at the bottom of the invoice window, into the *Payment* field on the invoice and click on the **Receipt** button. Genie will then automatically assign the gap payment to the first item number. You can spread the gap payment (proportionately) across all item numbers by **Alt+clicking** on the **Auto-Fill** button.

Date	Invoice	Provider	Patient	Item	Fee	Discount	Balance	Payment	Remove
04/09/2012	87	Dr Andrew Largeman	STATE, Samantha	41671	\$511.50	\$0.00	\$474.25	\$37.25	☐
04/09/2012	87	Dr Andrew Largeman	STATE, Samantha	41692	\$94.25	\$0.00	\$87.40	\$6.85	☐
04/09/2012	87	Dr Andrew Largeman	STATE, Samantha	41692	\$47.15	\$0.00	\$43.70	\$3.45	☐

If a patient only ever pays the Gap amount you can remind yourself of this by ticking the *Pays Gap Only* tickbox in the patient's Patient Demographics window. This will then be indicated in the invoice window.

5.4.4 Receipting an Existing Invoice for an Organisation

If the original invoice was billed to an organisation such as a health fund and it has not been batched (see [Manual Batching](#)), it must be receipted from the Account Holders list.

Select **Open > Account Holders**

Search for the organisation, highlight it and then select **Billing > Receipt**.

Note: If you receive an error message when you try to receipt from this list, you have nominated this account holder to be batch processed only. To reverse this, double-click on the record in the Account Holders list, and untick the *Batch Process Invoices* tickbox at the top of this window.

Fill in the total payment amount in the appropriate payment type field at top left of the Receipt window. To allocate the payment to the patients specified on the organisation's statement, simply click in the *Payment* field of each of the relevant patients. To assist with locating relevant patients, you are able to click on the *Patient* column header to sort alphabetically.

Receipt: Medibank Private

Bank to: National Bank Medibank Private
Indooroopilly QLD 4068

Cash \$0.00
Medicare Chq \$0.00
Personal Chq \$0.00
Fund Chq \$0.00
Credit Card \$0.00
EFTPOS \$2,717.78
Dir Deposit \$0.00

Total: \$2,717.78 \$0.00 remains to be allocated

CTRL-A Auto-Fill

Date	Invoice	Provider	Patient	Item	Fee	Discount	Balance	Payment	Re...
02/07/2010	120490	Dr Izzy Better	Bryant, Katie	49503	\$694.95	\$0.00	\$694.95	\$0.00	
02/07/2010	120490	Dr Izzy Better	Bryant, Katie	49118	\$193.75	\$0.00	\$193.75	\$0.00	
06/07/2010	120492	Dr Izzy Better	Bryant, Katie	50215	\$2,940.05	\$0.00	\$2,940.05	\$0.00	
06/07/2010	120492	Dr Noeline Jacka (Assist)	Bryant, Katie	51303	\$582.15	\$0.00	\$582.15	\$0.00	
23/01/2009	117633	Dr Izzy Better	Carr, Paul	30571	\$595.43	\$0.00	\$0.00	\$595.43	
23/01/2009	117657	Dr Izzy Better	Carr, Paul	16519	\$2,078.35	\$0.00	\$0.00	\$2,078.35	
16/05/2007	117172	Dr Izzy Better	Carr, Robyn	35753	\$1,101.75	\$0.00	\$1,101.75	\$0.00	
17/05/2007	117172	Dr Izzy Better	Carr, Robyn	110	\$169.55	\$0.00	\$169.55	\$0.00	
17/07/2009	117806	Dr Izzy Better	Carr, Robyn	16519	\$1,321.80	\$0.00	\$193.75	\$0.00	
17/07/2009	117806	Dr Newton J (Assist.)	Carr, Robyn	51306	\$167.55	\$0.00	\$500.00	\$0.00	
11/03/2005	116598	Dr Izzy Better	Frost, Jack	23	\$44.00	\$0.00	\$538.15	\$44.00	
17/02/2005	116573	Dr Izzy Better	Grace, Dorothy	23	\$33.00	\$0.00	\$33.00	\$0.00	

Cancel Apply Deposit Store Balance Owing: \$8,165.00 Print

5.5 Discounts

Discounts can be applied at the time of invoicing, receipting, or through the Account History window.

Discounts are recorded in the Payments section of the patient's Account History. They are also reflected in the relevant provider's Billing vs Income report (**File > Maintenance & Reports > Practice Analysis**).

Billing vs Income Report: 1/07/2009 to 30/06/2010

Print Breakdown Print Sales Print Receipts Summary Records Close

Provider	Billing	GST	Credits	Discounts	Nett Billing	Receipts	GST	Difference	Inv
Dr Anke Clinton	\$8,512.45	\$460.00	\$0.00	\$0.00	\$8,052.45	\$6,430.20	\$460.00	\$2,082.25	20
Dr Izzy Better	\$21,917.75	\$0.00	\$6.05	\$172.30	\$21,739.40	\$12,053.30	\$0.00	\$9,686.10	62

The Daily Billing report (**File > Maintenance & Reports > Daily**) allows you to track discounts on a daily basis.

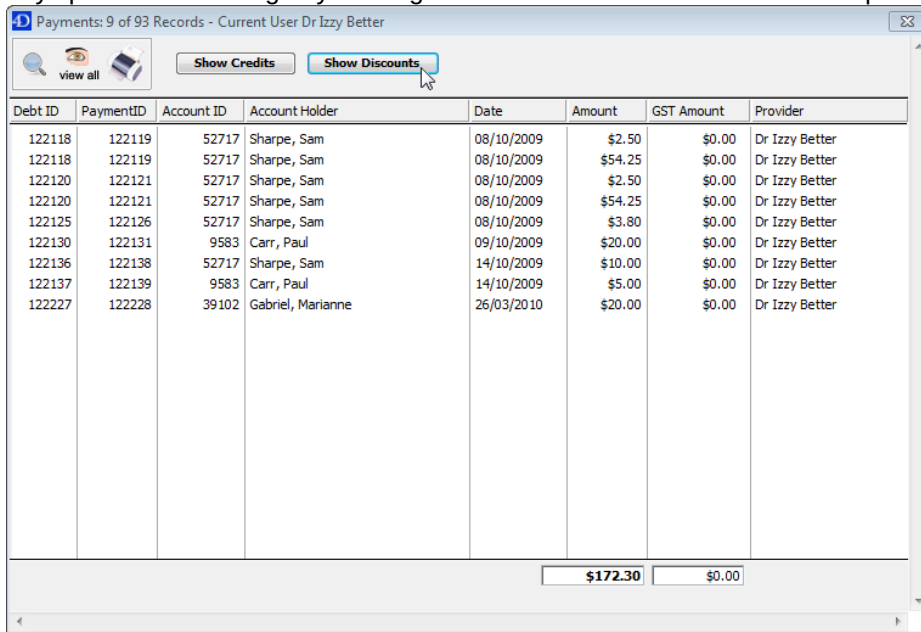
Daily Billing

26/03/2010 Provider: All Select Show Reversals

Date	Patient Name	Provider ID	Item No	Description	Total Fee	Discount	Payment	Credits	Balance
26/03/2010	Fagg, Isabel M	Dr Izzy Better	104	Specialist, referred cons.	\$110.00		\$110.00		
26/03/2010	Gabriel, Marianne	Dr Izzy Better	106	- initial specialist ophthalr	\$40.00	\$20.00			\$20.00
26/03/2010	Kabalan, Samira	Dr Izzy Better	98	Professional attendance	\$200.00				\$200.00
26/03/2010	Lockhart, Nicholas	Dr Izzy Better	104	Specialist, referred cons.	\$120.00		\$120.00		
25/03/2010	Nagappan, Mohan	Dr Izzy Better	97	Professional attendance	\$250.00		\$250.00		

Items: 5 Nett Billing (i.e. Total less Credits and Discounts)-> \$700.00 \$20.00 \$480.00 \$0.00 \$220.00

The Payments section in the **Administrator** tab of Maintenance & Reports allows you to show discounts from any specified date range by clicking the **Show Discounts** button in the top of the window.



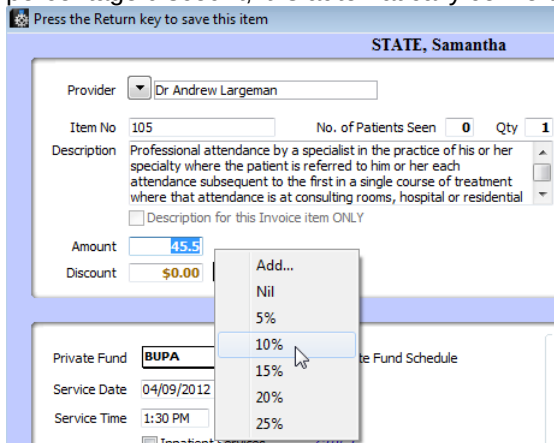
Debt ID	PaymentID	Account ID	Account Holder	Date	Amount	GST Amount	Provider
122118	122119	52717	Sharpe, Sam	08/10/2009	\$2.50	\$0.00	Dr Izzy Better
122118	122119	52717	Sharpe, Sam	08/10/2009	\$54.25	\$0.00	Dr Izzy Better
122120	122121	52717	Sharpe, Sam	08/10/2009	\$2.50	\$0.00	Dr Izzy Better
122120	122121	52717	Sharpe, Sam	08/10/2009	\$54.25	\$0.00	Dr Izzy Better
122125	122126	52717	Sharpe, Sam	08/10/2009	\$3.80	\$0.00	Dr Izzy Better
122130	122131	9583	Carr, Paul	09/10/2009	\$20.00	\$0.00	Dr Izzy Better
122136	122138	52717	Sharpe, Sam	14/10/2009	\$10.00	\$0.00	Dr Izzy Better
122137	122139	9583	Carr, Paul	14/10/2009	\$5.00	\$0.00	Dr Izzy Better
122227	122228	39102	Gabriel, Marianne	26/03/2010	\$20.00	\$0.00	Dr Izzy Better
					\$172.30	\$0.00	

5.5.1 Applying when Invoicing

You can apply a discount whilst invoicing, either at the stage of adding an item or after an item has been added.

To apply a discount in the Add Item to Invoice window, select the provider and add an item number as usual.

You can then discount the item based on a percentage by clicking on the **black drop-down arrow** button. Alternatively, you can discount by a dollar amount by just typing the amount into the *Discount* field. If you enter a percentage discount, it is automatically converted into the appropriate dollar amount.



STATE, Samantha

Provider: Dr Andrew Largeman

Item No: 105 No. of Patients Seen: 0 Qty: 1

Description: Professional attendance by a specialist in the practice of his or her specialty where the patient is referred to him or her each attendance subsequent to the first in a single course of treatment where that attendance is at consulting rooms, hospital or residential

Amount: 45.5

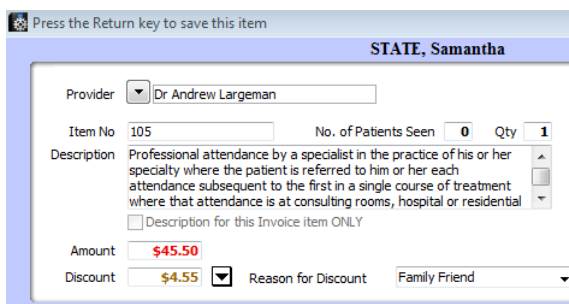
Discount: \$0.00

Private Fund: BUPA

Service Date: 04/09/2012

Service Time: 1:30 PM

Reason for Discount: Family Friend



STATE, Samantha

Provider: Dr Andrew Largeman

Item No: 105 No. of Patients Seen: 0 Qty: 1

Description: Professional attendance by a specialist in the practice of his or her specialty where the patient is referred to him or her each attendance subsequent to the first in a single course of treatment where that attendance is at consulting rooms, hospital or residential

Amount: \$45.50

Discount: \$4.55

Reason for Discount: Family Friend

If you would like to apply a discount after you have added an item, click in the *Discount* column to choose the

percentage you would like to discount. If you prefer to give a dollar discount amount, select *Other* from this drop-down list and type in the discount figure.

New Invoice

Self Bulk Bill DVA Work cover Other BUPA Australia

Miss Samantha STATE
9 Terrace Street
GARDENVALE VIC 3185

Account Type: **Private**
Private Fund: **BUPA Australia**

Invoice Date: 02/11/2012
Invoice No: 141

Item/s to Charge:

Add Item to Invoice Referring Doctor: **Dr R J COHEN (02/11/2012 t...** Distance Travelled: kms

Delete Item Practice Name: **Genie Medical Centre**

Site of Service: **Genie Medical Centre**

Patient Claims: **Always**
☒ Use Patient Claims

Date	Patient Name	Provider	Item No	Description	Rebate	Fee	Discount	GST
02/11/2012	STATE, Samantha	Dr Andrew Largemar	105	Professional attendance by a s	\$35.90	\$45.50	\$0.00	

Gap: \$9 ☒ Pays Gap Only

Invoice Memo: **Default**

Apply Multiple Item Rule
Apply DIMSR
Add Known Gap

Amount Balance: **\$2,466.05**
GST Component: \$0.00
Total for this Invoice: \$45.50
Closing Balance: **\$2,511.55**
Payment: **\$0.00**

Cancel **Include Asst's Fee** **Invoice as Asst.** **Apply Deposit** **Defer** **Print**

The 'Total for this Invoice' will display the discounted total.

Rebate	Fee	Discount	GST
\$35.90	\$45.50	\$5.00	

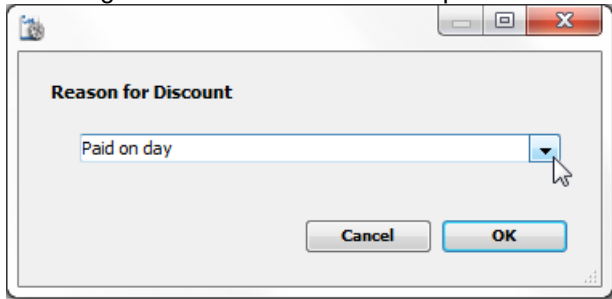
Opening Account Balance: **\$2,442.85**
GST Component: \$0.00
Total for this Invoice: \$40.50
Closing Balance: **\$2,483.35**
ap Only Payment: **\$0.00**

Defer **Print**

If there is no payment, you can just click **Print** to print the unpaid invoice, otherwise enter in the payment amount and click **Receipt**

Clicking on **Receipt** will take you to the usual receipting window. In this window, you can enter a reason for the discount (if you have not done this in the previous window), by right-clicking in the *Discount* column. An asterisk next to the discount amount indicates that you have not entered a reason for the discount. If a reason is not specified, the discount will display the reason as Unspecified in the patient's Account History.

Selecting *Edit Discount Reason* will open a window allowing you to enter a reason for the discount.

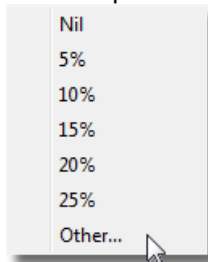


You can permanently add this to your list of reasons by clicking on the little arrow above and selecting *Add to Menu*.

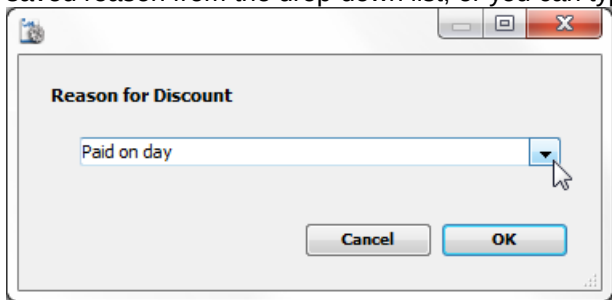
5.5.2 Applying when Receipting

You can apply a discount to an unpaid invoice at the time of receipting. You can do this in almost the same way as applying a discount at the time of the invoice.

In the Receipt window, you will see the *Discount* column as it was in the Invoice window. Select the appropriate discount percentage or dollar amount by selecting 'Other...'.



After selecting the amount you will be asked to enter in the reason for applying the discount. You can select a saved reason from the drop-down list, or you can type in a new reason.



You can permanently add this to your list of reasons by clicking on the little arrow above and selecting *Add to Menu*.

The balance owing will be adjusted to reflect the discount.

Receipt the amount as per usual.

5.5.3 Reversing a Discount

If a discount was applied incorrectly, or is no longer valid, you can reverse discounts through the patient's Account History ([Billing > Account History](#)).

Highlight the invoice in the left hand column to display the associated discount in the Payments section in the bottom of this window.

Account History for Samantha STATE

Statement Print Report Find Batch Reset Create Patient Claim Delete Patient Claim

Show Outstanding Itemised Receipt Resend IMC Exceptions Balance of displayed items: **\$40.50**
Blue cells can be modified with a slow double-click

INVOICES

Date	Provider	Patient	Item	Fee	Payment	Discount	Credit	Balance
04/09/12	STATE, Samantha	89						
04/09/12	STATE, Samantha	87						
04/09/12	STATE, Samantha	86						
04/09/12	STATE, Samantha	77						
04/09/12	STATE, Samantha	71						
04/09/12	STATE, Samantha	68						
17/08/12	STATE, Samantha	63						
17/08/12	STATE, Samantha	61						
02/08/12	STATE, Samantha	56						
20/07/12	STATE, Samantha	54						
20/07/12	STATE, Samantha	49						
20/07/12	STATE, Samantha	47						
20/07/12	STATE, Samantha	45						
20/07/12	STATE, Samantha	43						
20/07/12	STATE, Samantha	42						
20/07/12	STATE, Samantha	38						

04/09/12 89 STATE, Samantha
04/09/12 87 STATE, Samantha
04/09/12 86 STATE, Samantha
04/09/12 77 STATE, Samantha
04/09/12 71 STATE, Samantha
04/09/12 68 STATE, Samantha
17/08/12 63 STATE, Samantha
17/08/12 61 STATE, Samantha
02/08/12 56 STATE, Samantha
20/07/12 54 STATE, Samantha
20/07/12 49 STATE, Samantha
20/07/12 47 STATE, Samantha
20/07/12 45 STATE, Samantha
20/07/12 43 STATE, Samantha
20/07/12 42 STATE, Samantha
20/07/12 38 STATE, Samantha

PAYMENTS

Type	Invoice	Date	Provider	Form	Amount
3	89	4/09/2012	Dr Andrew Largeman	Disc: Family Friend	\$5.00

Print

Delete

0-Payment
1-Deposit
2-Credit
3-Discount

Highlight the discount and click **Delete**.

PAYMENTS

Type	Invoice	Date	Provider	Form	Amount
3	89	4/09/2012	Dr Andrew Largeman	Disc: Family Friend	\$5.00

Print

Delete

0-Payment
1-Deposit
2-Credit
3-Discount

You will be required to enter a reason for deleting the discount, this will be tracked in the Sales Audit.

Request

Enter reason:

Overdue Payment

Cancel OK

5.5.4 Modifying a Discount

Discounts can be increased either through the patient's Account History window or when receipting.

In the patient's Account History window, highlight the relevant invoice in the Invoices column on the right. Slow double-click in the *Discount* field for the item and enter in dollar amount or the percentage followed by a percent (%) sign. If you type in a percentage, the figure will refresh to become the full dollar amount once you press **Tab** or **Enter** to confirm the discount.

Date	Provider	Patient	Item	Fee	Payment	Discount	Credit	Balance
4/09/2012	Dr Andrew Largent	STATE, Samantha	40703	\$1,552.00	\$0.00	40%	\$0.00	\$1,552.00
4/09/2012	Dr Andrew Largent	STATE, Samantha	105	\$45.50	\$0.00	\$0.00	\$0.00	\$45.50

Note: Discounts applied in this manner will be on a cumulative basis, meaning any further discounts will be added to the already existing discount amount.

If a discount has been applied incorrectly using the above method, it will need to be deleted from the Payments section in the bottom of the Account History window.

At the time of receipting, the discount amount can be increased by clicking in the discount field and selecting the appropriate discount amount.

[illegible]

5.6 Deposits

Genie allows for you to accept deposits from patients. Use this feature when you require a patient to make a full or partial payment prior to a procedure.

5.6.1 Accepting A Deposit

To accept a deposit, select the patient from either the Patient List ([Open > Patients](#)) or the Appointment Book, then go to [Billing > Accept Deposit](#). This opens the Deposit window as shown below.

Select the relevant doctor from the *Provider* drop-down menu and the doctor's default bank account will appear in the *Bank* drop-down menu. You can change this by clicking on the *Bank* drop-down menu and selecting the appropriate bank account. Enter the deposit amount in the *Amount* field and select the relevant payment method. If a patient does not have an *Anticipated Operation Date*, you can leave this field as 00/00/0000. You can back-date a deposit by changing the date field in the top-right of this window. Once all the details are correct, click **OK**.

You will be asked if you would like to print a receipt for the patient. Click **Print Receipt** to print a receipt for the patient or **Cancel** to not print the receipt. You can print the deposit at a later date from the patient's account history by selecting the deposit (which has a type 1) from the Payments section and clicking **Print**.

After accepting a deposit, a banking record is created and the patient's account balance is credited with the deposit amount. You can view all current deposits by selecting [Billing > List Deposits](#).

Note: A deposit must be accepted and applied on separate banking days (ie. banking must be sealed between accepting and applying a deposit). Accepting a deposit and applying the deposit before sealing the banking batch will cause problems when trying to reconcile the banking. It will also produce incorrect data in the Billing vs Income report.

5.6.2 Deleting A Deposit

Deposits can be deleted from either the List Deposits window ([Billing > List Deposits](#)) or the patient's account history. In the List Deposits window, highlight the deposit you want to delete and then click the **Delete**  button.

Date	Name	Provider	Operation Date	Amount
11/09/2014	DREW, Miriam	Dr Miranda Lawson	00/00/0000	\$500.00

A window will appear asking you to enter the reason why this deposit is being deleted (e.g. Refunded as patient is no longer having the procedure). Type the reason and click **OK**. A record of this deleted deposit and the reason why it was deleted is recorded in the Audit report (see [Audit](#)).

To delete a deposit from the patient's account history, highlight the deposit (which has a type of 1) from the Payments section and click the **Delete** button. Again you will be required to enter a reason as to why this deposit is being deleted.

PAYMENTS	Type	Invoice	Date	Provider	Form	Amount
Print	1	0	11/09/2014	Dr Miranda Lawson	Cash	\$500.00
Delete						

0-Payment
1-Deposit
2-Credit
3-Discount

Note: Deposits are recorded in the banking at the time of accepting the deposit, not at the time of applying it. If you delete a deposit before the banking has been sealed, there will be no record of this deposit in Genie. If you delete the deposit after the banking has been sealed, you will need to make a note in your external banking that this deposit was deleted, as once a banking batch has been sealed it cannot be changed.

5.6.3 Using A Deposit

Note: As noted in the [Accepting A Deposit](#) page, you must have sealed the deposit into a banking batch before using it.

You can apply an accepted deposit in the New Invoice window or the Receipt window. In both windows, if there is a deposit stored for the patient, the **Apply Deposit** button will become available.

New Invoice

Self Bulk Bill DVA Work cover Other Uninsured

Mrs Miriam DREW
1/2 Banksia Court
OXLEY QLD 4075

Account Type: Private
Private Fund:

Invoice Date: 18/09/2014
Invoice No: 296

Item/s to Charge:

Add Item to Invoice

Referring Doctor: Dr Murray SOL (11/09/2014 ...)

Practice Name: Genie Medical Centre

Site of Service: Genie Medical Centre

Distance Travelled: kms

Patient Claims

☐ Use Patient Claims

Apply Multiple Item Rule

Apply DIMSR

Add Known Gap

Date	Patient Name	Provider	Item No	Description	Rebate	Fee	Discount	GST
18/09/2014	DREW, Miriam	Dr Miranda Lawson	41789	Tonsils or tonsils and adenoids, removal	\$221.80	\$415.00	\$0.00	
18/09/2014	DREW, Miriam	Dr Miranda Lawson	41764	Nasendoscopy or sinoscopy or fibreoptic	\$92.15	\$180.00	\$0.00	

Invoice Memo: Default

Gap: \$281.05

☐ Pays Gap Only

Opening Account Balance (\$545.00)

GST Component \$0.00

Total for this Invoice \$595.00

Closing Balance \$50.00

Payment

Cancel **Include Asst's Fee** **Invoice as Asst.** **Apply Deposit** **Defer** **Print**

Receipt: DREW, Miriam

Bank to: SNC Suncorp Bank Cash \$0.00 Medicare Chq \$0.00 Personal Chq \$0.00 Fund Chq \$0.00 Credit Card \$0.00 EFTPOS \$0.00 Dir Deposit \$0.00 Total: \$0.00	18/09/2014	Mrs Miriam DREW 1/2 Banksia Court OXLEY QLD 4075 ☐ Patient Claims ☒ Use Patient Claims
--	-------------------	--

\$0.00 remains to be allocated

"CTRL-A"
Auto-Fill

Date	Invoice	Provider	Patient	Item	Fee	Discount	Balance	Payment	Remove
18/09/2014	292	Dr Miranda Lawson	DREW, Miriam	41789	\$385.00	\$0.00	\$385.00	\$0.00	
18/09/2014	292	Dr Miranda Lawson	DREW, Miriam	41764	\$160.00	\$0.00	\$160.00	\$0.00	

Cancel
Apply Deposit
Store
Balance Owng: **\$545.00**
Print

In the Invoice window, if you click the **Print** (or **Receipt** if you have entered a payment) button without using an accepted deposit, a window will appear stating that there is a deposit for this patient and will ask if you would like to use it on this invoice. Clicking **I Don't Want to Use the Deposit** will proceed with printing or receipting the invoice. Clicking **Cancel** will allow you to return to the invoice and apply the deposit.

When you click on the **Apply Deposit** button while invoicing or receipting, a window will appear asking you to select the deposit(s) for this patient that you want to apply to this invoice. Tick the check box(es) to the left of the deposit(s) that you require and click **OK**.

[illegible]

In the Invoice window, the sum of the selected deposit(s) will be entered into the Payments field as show below:

Opening Account Balance	(\$545.00)
GST Component	\$0.00
Total for this Invoice	\$595.00
Closing Balance	\$50.00
Payment	545

In the Receipt window, the sum of the selected deposit(s) will be entered into the payment type field that was selected when the deposit was accepted. In the example below, it is entered into the *EFTPOS* field:

Cash	\$0.00
Medicare Chq	\$0.00
Personal Chq	\$0.00
Fund Chq	\$0.00
Credit Card	\$0.00
EFTPOS	\$545.00
Dir Deposit	\$0.00
Total:	\$545.00

If the deposit amount is equal to the invoice amount, the invoice can be receipted and the invoice will be fully paid.

If the deposit amount is less than the invoice amount (e.g deposit is \$545.00 and the invoice is \$595.00), you will first need to receipt the deposit amount and then receipt the remaining amount to be paid by the patient.

Note: The deposit amount and additional payment must be receipted separately so that Genie can distinguish between the deposit amount, which has already been sealed in a previous banking batch, and the additional payment which will appear on the current, unsealed banking batch.

If the deposit amount is more than the invoice amount, then the total amount of the invoice will be applied to the invoice and the remainder of the deposit will be adjusted. This remaining deposit amount will remain in the patient's account history and the List Deposit window until it is used for a future invoice or deleted.

PAYMENTS	Type	Invoice	Date	Provider	Form	Amount
Print	0	296	18/09/2014	Dr Miranda Lawson	EFTPOS	\$180.00
	0	296	18/09/2014	Dr Miranda Lawson	EFTPOS	\$415.00
Delete	1	0	18/09/2014	Dr Miranda Lawson	EFTPOS	\$200.00

5.7 Quotes

Quotes can be created for procedures that have already been booked, or procedures that are yet to be booked (i.e. [Pending Procedures](#)).

Procedures that have been booked can be accessed through the patients Clinical Window, or from the Appointment Book.

1 procedure				Last 10 Consults	
All	Procedures	Hospital	Provider		
4/09/2012	Corticectomy	Wesley Hospital	Dr Andrew Largeman		

If a quote is required prior to booking in the procedure, the procedure can be added without an appointment through the Tools menu (**Tools > Add Procedure**). For more information see [Adding a Procedure](#).

In either situation, quotes are then prepared through the **Quotes** tab of the Procedure window.

5.7.1 Preparing Quotes

Mrs Toni G J Caelli - No contact number

Details Quotes Op Notes

Private Fund: HCF
Type:
Fee Schedule: PMS

Calculating quotes involves complex calculations with many variables which can be changed at any time. Therefore, Genie Solutions does not warrant that the result is always correct.

Invoiced

☒ Use Selected Schedule (above)
☐ Use No Gap
☐ Use Known Gap

☐ Include Assistant's Fee

☒ Apply DIMSR
☒ Apply Multiple Procedure Rule 100/50/25

CALCULATE FEES

Link 31340

No	Item No	Description	Fee	Rebate	GST	Known Gap	Fractl...	AMA

Estimated Out of Pocket Expense \$0.00 \$0.00 \$0.00 \$0.00 \$0.00

Invoice Quote Load Template Save Template Macros Delete Cancel OK

1. Add all your items via the **Blue plus** button , or load these from a template (see [Procedure Templates](#).)
2. Select the patient's *Private Fund*, if not already selected.
3. Select the *Type* ie. *Inpatient*, *Outpatient* or *Day Surgery*.
4. Choose your options according to the type of quote you are generating as specified below:

Private fees quote:

- Select the *Fee Schedule*.
- Click *Use Selected Schedule* (above).
- The *Apply DIMSR* (Diagnostic Imaging Multiple Service Rule) and *Apply Multiple Procedure Rule* tickboxes will be ticked by default, untick if not required.
- Tick *Include Assistant's Fee*, if appropriate. You will be prompted for the assistant's name which draws from any entry in the Address Book marked as *Assists at Operations*. You are then able to choose what you will be charging for the assist fee from the options that appear.

☒ **Include Assistant's Fee**

- ☒ One Fifth of Surgeon's Fee
- ☐ Medicare Schedule Fee
- ☐ DVA
- ☐ Health Fund Fee
- ☐ Workcover Fee
- ☐ Your Own Private Fee

- e. Finally, click on **CALCULATE FEES** to get the total of your quote.

No Gap quote:

- a. Click *Use No Gap*.
- b. The *Apply DIMSR* (Diagnostic Imaging Multiple Service Rule) and *Apply Multiple Procedure Rule* checkboxes will be ticked by default, untick if not required.
- c. Tick *Include Assistant's Fee* if appropriate. You will be prompted for the assistant's name, which draws from any address book entry marked as *Assists at Operation*. You are then able to choose what you will be charging for the assist fee, which in this case would be *Health Fund Fee*.
- d. Finally, click **CALCULATE FEES** to get the total of your quote.

Known Gap quote – adding a total known gap to the quote:

- Click Use Known Gap.
- Click *Use Fund's Gap* which will allow you then to put a total known gap to the quote.

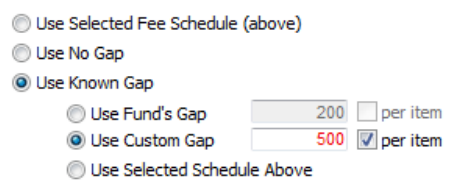


- The Maximum Known Gap can be entered into **Open > Billing Items, Health Fund** button by double-clicking on the fund name and entering the gap amount into the *Max Gap Amount* field. This is based on the agreement you have with each Health Fund.
- The *Apply DIMSR* (Diagnostic Imaging Multiple Service Rule) and *Apply Multiple Procedure Rule* tickboxes will be ticked by default, untick if not required.
- Tick *Include Assistant's Fee*, if appropriate. You will be prompted for the assistant's name which draws from any address book entry marked as *Assists at Operations*. You are then able to choose what you will be charging for the assist fee, which in this case would be *Health Fund Fee*.
- Finally, click **CALCULATE FEES** to get the total of your quote.

Known Gap quote – adding a custom gap to the quote:

There may be times when you choose to charge a gap that is different to the maximum known gap as per your agreement with the health fund (eg. if you want to charge less than the maximum gap). For these situations, Genie allows you to charge a customisable gap.

- Click Use Known Gap.
- Click Use Custom Gap. You should note that the Use Fund's Gap field greys out.



- Enter the custom gap amount and tick per item if applicable.
- The *Apply DIMSR* (Diagnostic Imaging Multiple Service Rule) and *Apply Multiple Procedure Rule* tickboxes will be ticked by default, untick if not required.
- Tick *Include Assistant's Fee*, if appropriate. You will be prompted for the assistant's name which draws from any address book entry marked as *Assists at Operations*. You are then able to choose what you will be charging for the assist fee.
- Click **CALCULATE FEES** to get the total of your quote.

If the custom gap exceeds the maximum known gap for the health fund, you will receive a warning. You will be able to proceed with creating the quote, however the warning should serve as a prompt to confirm the details of the quote with the relevant health fund.

If the maximum known gap and custom gap are both set across the entire procedure (i.e. per item is unticked for both), OR if maximum known gap for the health fund is set to apply the gap across the whole procedure (i.e. not ticked per item) but the custom gap is ticked to apply per item, you will receive the following warning if the custom gap exceeds the maximum known gap:

Total gap exceeds max amount recorded against the Health Fund.

If the maximum known gap for the health fund is ticked to apply the gap per item and the custom gap is ticked to apply across the whole procedure, OR if both the maximum known gap and the custom gap are both set per item, you will receive the following warning if the custom gap exceeds the known gap, and the individual item that exceeds the maximum known gap will be highlighted in red.

Individual gap exceeds amount recorded against the Health Fund.

Known Gap quote – using your own fees to determine the known gap:

- Select the Fee Schedule.
- Click *Use Known Gap*.
- Click *Use Selected Schedule Above*.
- The *Apply DIMSR* (Diagnostic Imaging Multiple Service Rule) and *Apply Multiple Procedure Rule* tickboxes will be ticked by default, untick if not required.
- Tick *Include Assistant's Fee*, if appropriate. You will be prompted for the assistant's name which draws from any address book entry marked as *Assists at Operations*. You are then able to choose what you will be charging for the assist fee.
- Click **CALCULATE FEES** to get the total of your quote.

You can edit the automatically-inserted fees by placing the cursor in the *Fee* field and changing the fee.

To change the fee permanently, highlight the item and then click on the **Edit** button.

Link 31340 Assistant Threshold: \$527.65

No	Item No	Description
1	49560	Knee, arthroscopic surgery of, involving 1 or m
2	49560	Knee, arthroscopic surgery of, involving 1 or m
3	51303	Assistant at Operation

This will open the Billing Items record for that item, allowing you to edit the fee amount for private fees and health fund fees.

Editing Item 49560

Item Number: 49560 MBS Group: T8 Category: Procedures

Usual Time (mins): 0 Anaes. Units: 0

☒ Assistant Billable
☐ Display in List of Commonly Used Items ☐ Manage Stock
☒ Multiple Procedure Rule Applies to This Item
☐ This Item Includes GST in the Price
☒ Always an Inpatient Procedure

Add a Fund: Uninsured

AHSA	BUPA	Fund	Fee	% Schedule
☒	☐	ACA Health Benefits Fund	\$905.80	0
☒	☐	AMA Health Benefits Fund	\$0.00	0
☒	☐	Aust. Country Health	\$905.80	0
☒	☐	Aust. Health Management	\$0.00	0
☒	☐	Aust. Unity Health Limited	\$905.80	0
☐	☒	AXA	\$848.25	0
☐	☒	BetterHealth Cover	\$0.00	0
☐	☒	BUPA Australia	\$848.25	0
☒	☐	CBHS Friendly Society Ltd.	\$905.80	0
☒	☐	Credicare Health Fund	\$905.80	0
☒	☐	Defence Health	\$905.80	0
☒	☐	Druids Friendly Society	\$905.80	0
☒	☐	GMF Health	\$905.80	0
☒	☐	GMHBA	\$905.80	0
☒	☐	Govt. Employees Health Fund	\$905.80	0

Add a Fee:

Type	Fee
Private	\$717.10
HCC	\$0.00
PMS	\$0.00
Schedule	\$551.60
Rebate	\$413.70
IP Rebate	\$413.70
Veterans Affairs	\$552.20
DVA Inpatient	\$921.80
DVA Outpatient	\$0.00
AMA	\$0.00
Workcover	\$1,752.00
Custom 1	\$0.00
Custom 2	\$0.00
Custom 3	\$0.00
AL	\$689.50

Navigation buttons: Previous, Next, Cancel, Save

For information on importing health fund fee schedules, see [Private Health Fund Fees](#).

Note: The AMA Fee Schedule can be imported from the Billing Items window. You must contact the AMA and ask them to provide you with the schedule. Genie is not allowed to distribute this as the AMA wishes to limit access to AMA members only.

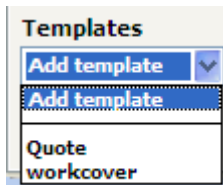
The Rebate amount calculated in the quote depends on whether the patient is privately insured, and whether you have specified the procedure as an inpatient or outpatient procedure (see table below).

Insured?	Inpatient or Outpatient?	Rebate Calculated
No	Outpatient	85% Medicare Rebated
No	Inpatient	75% Medicare IP Rebate
Yes	Either	100% Schedule
Yes (No-Gap or Known Gap)	Either	Health Fund Rebate

5.7.2 Printing a Quote

Printing a Quote

To print a quote, go to the **Quotes** tab of the procedure for which you would like to print a quote, and select the quote template using the *Templates* drop-down menu at the bottom left of the quote window.

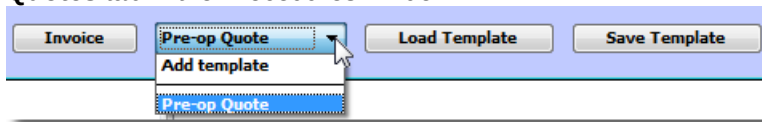


The item information and fees will be transcribed to the quote template, and can then be printed using the **Printer** button at top right of this window.

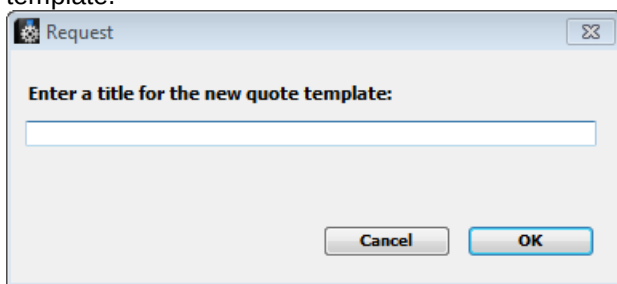
For information on setting up quote templates, see [Creating Quote Templates](#).

5.7.3 Creating Quote Templates

To create or edit a quote template, select the template from the drop-down menu in the lower left corner of the **Quotes** tab in the Procedures window.



If you don't already have a quote template, select 'Add Template' and you will be asked to enter a name for the template.



After doing this, a new template will automatically open.

Note: You can have as many different types of quote templates as you like. You could also create a template here to act as an operation report.

When a new quote template is created, it includes the basic information about the procedure. This information is referenced from the fields in the underlying procedure record.

Jess Baas
6 Tara Street
Indooroopilly Qld 4068

Please find our quote for the recommended procedure below.

Item No	Description	Fee	Rebate
47054	Knee, treatment of dislocation of, by closed reduction	\$179.55	\$140.55
47588	Knee joint, treatment of fracture of, by internal <u>fixat</u>	\$1,456.70	\$1,140.60
Total Fee:		\$1,636.25	
Estimated Rebate:		\$1,281.15	
Out of Pocket Cost:		\$355.10	

You can see the references by clicking on the **View References** button .

This will display the template as shown below:

«[Patients]Title» «[Patients]First Name» «[Patients]Surname»
«[Patients]Address Line 1»
«[Patients]Suburb» «[Patients]State» «[Patients]Postcode»

Please find our quote for the recommended procedure below.

Item No	Description	Fee	Rebate
47054	Knee, treatment of dislocation of, by closed reduction	\$179.55	\$140.55
47588	Knee joint, treatment of fracture of, by internal <u>fixat</u>	\$1,456.70	\$1,140.60
Total Fee:		\$1,636.25	
Estimated Rebate:		\$1,281.15	
Out of Pocket Cost:		\$355.10	

You can reference other fields in the procedure record, or the patient's record. For information on how to do this, please refer to the [Fields & Expressions Tabs](#).

You are also able to add your own patient information to this template. For example, disclaimers about Anaesthetist and hospital fees, etc. Once you have typed this information into the template, save it by clicking on the **Save** button.



Before you do this, you must let Genie know where to insert the actual quote information when you next open this template. To do this, highlight all the text from 'Item No' down to the 'Out of Pocket Cost', as shown below:

Jess Baas
6 Tara Street
Indooroopilly Qld 4068

Please find our quote for the recommended procedure below.

Item No	Description	Fee	Rebate
47054	Knee, treatment of dislocation of, by closed reduction	\$179.55	\$140.55
47588	Knee joint, treatment of fracture of, by internal <u>fixat</u>	\$1,456.70	\$1,140.60
Total Fee:		\$1,636.25	
Estimated Rebate:		\$1,281.15	
Out of Pocket Cost:		\$355.10	

Then replace this section of the quote template with 'XXX', as seen below.

Jess Baas
6 Tara Street
Indooroopilly Qld 4068

Please find our quote for the recommended procedure below.

xxx

Click on the **Save** button .

Note: Don't save the template with the references showing otherwise it will print with the names of the references instead of the referenced information.

At the top of this window there are four tickboxes.

☒	Use for Quotes
☐	Create a Consult after Printing
☐	Save copy in clinical record
☐	Interactive Spellchecking

The *Use for Quotes* tickbox should already be ticked. This tells Genie to display this template in the drop-down menu in the Procedure window.

You will probably want to also check the *Save a Copy in Patient Correspondence* tickbox. This will make a copy of this quote and save it in the patient's Clinical Window so that you have a record of what was actually quoted. This occurs when you print the record.

If you aren't printing the record you can still save a copy in the Clinical Window by clicking the **Copy to Patient**

Record Without Printing button .

5.7.4 Invoicing Directly From A Quote

This would be used if there were no complications in surgery and the invoice is exactly as quoted.

Click on the **Invoice** button in the **Quotes** tab of the Procedure window and an invoice will be created with all items and fees as in the quote.

New Invoice

Self Bulk Bill DVA Work cover Other BUPA Australia

Miss Samantha STATE
9 Terrace Street
GARDENVILLE VIC 3185

Account Type: Private
Private Fund: BUPA Australia

Invoice Date: 02/11/2012
Invoice No: 148

Item/s to Charge:

Referring Doctor: Dr R J COHEN (02/11/2012 t... Distance Travelled: kms

Practice Name: Genie Medical Centre

Site of Service:

Date	Patient Name	Provider	Item No	Description	Rebate	Fee	Discount	GST
02/11/2012	STATE, Samantha	Dr Andrew Largemar	40703	Corticectomy, topectomy or pe	\$1,079.25	\$1,552.00	\$0.00	
02/11/2012	STATE, Samantha	Dr Andrew Largemar	105	Professional attendance by a s	\$35.90	\$45.50	\$0.00	

Gap: \$482.35

Opening Account Balance \$1,557.05
GST Component \$0.00
Total for this Invoice \$1,597.50
Closing Balance \$3,154.55
Payment 0

Invoice Memo: Default

Buttons: Cancel, Include Asst's Fee, Invoice as Asst., Apply Deposit, Defer, Print

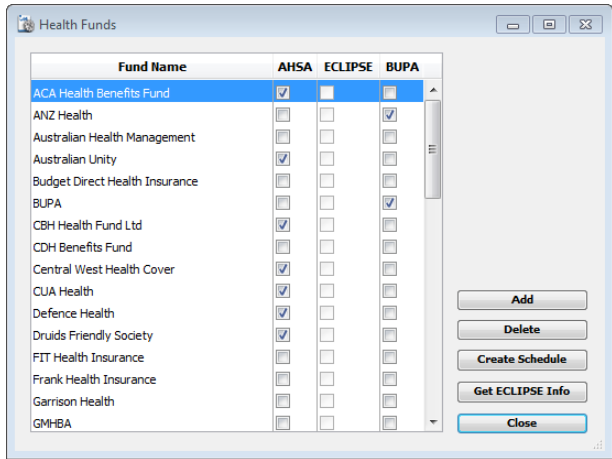
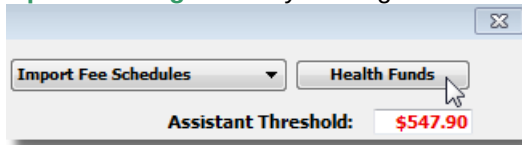
Then assign the account holder (e.g. the health fund) and apply deposits as per usual.

If billing to a health fund, there must be a corresponding account holder. For information on how to attach an account holder to an organisation, please see [Account Holders for Organisations](#).

If the quote is vastly different to what needs to be invoiced just invoice through the Billing menu (**Billing > Invoice**)

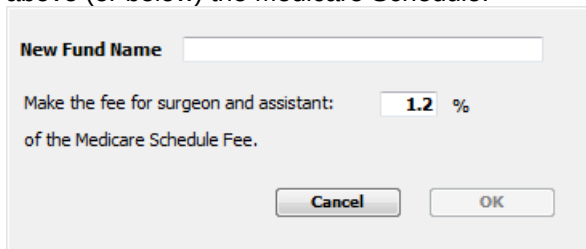
5.8 Private Health Fund Fees

Genie comes with most health funds pre-loaded. If you would like to add any additional funds, you can do this in **Open > Billing Items** by clicking the **Health Funds** button.



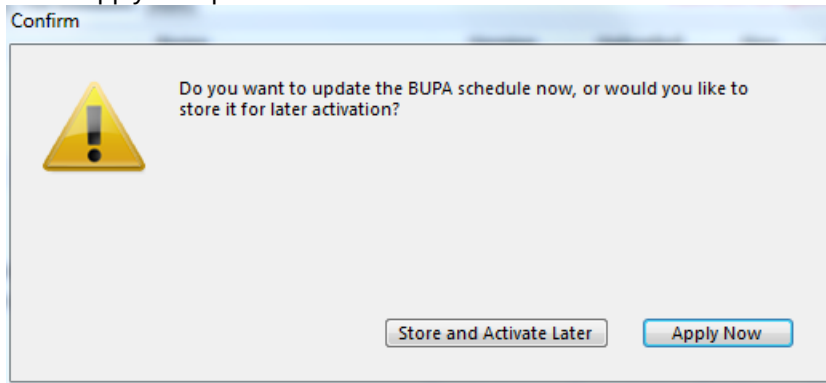
To add a fund, click on the **Add** button. To delete a fund you will not use, or to delete duplicate entries of a fund, click on the **Delete** button. Existing funds can also be edited by double-clicking on the fund name in the list.

The **Create Schedule** button allows you to create schedules for those funds whose fees are a percentage above (or below) the Medicare Schedule.



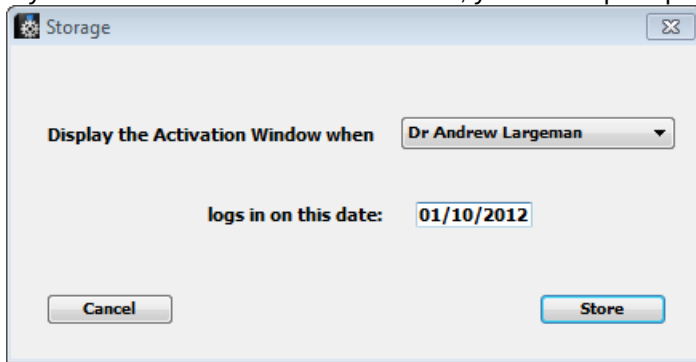
Updating Fees Online

Genie provides schedules for all the major private health funds. These schedules are available by going into **Special > Software Updates** and selecting the **Fee Schedules** tab. Tick the health fund(s) you would like to import fees for, and click on the **Install X item(s)** button. You will receive a prompt asking whether you would like to apply the update now or store it for later activation.



If you choose **Apply Now**, the fees will be updated across the network and ready to use immediately.

If you select **Store and Activate Later**, you will be prompted for a user and an activation date.



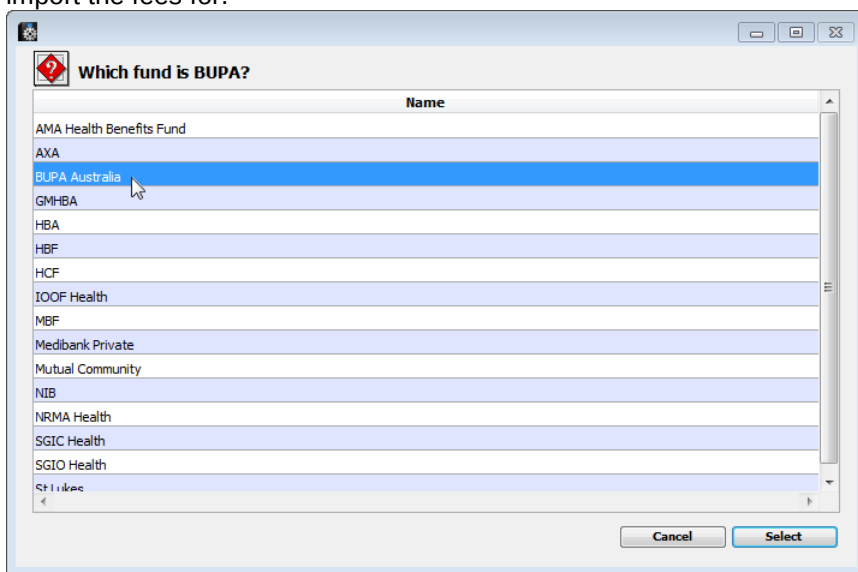
Storage

Display the Activation Window when: Dr Andrew Largeman

logs in on this date: 01/10/2012

Cancel Store

Genie will download and import into the relevant fund automatically if the health fund name is spelled *exactly* as it is displayed in Software Updates. If it is not, you will be prompted to choose which fund you would like to import the fees for.



Which fund is BUPA?

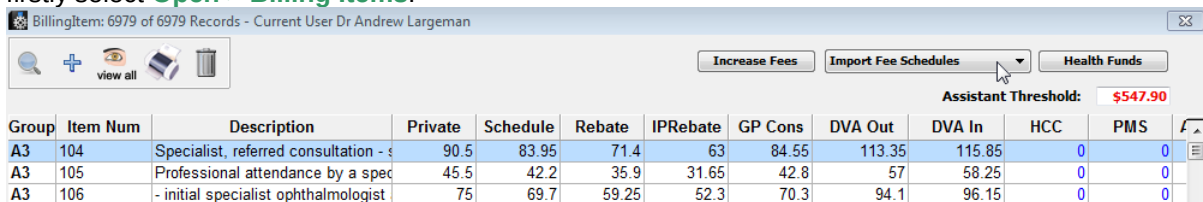
Name
AMA Health Benefits Fund
AXA
BUPA Australia
GMHBA
HBA
HBF
HCF
IOOF Health
MBF
Medibank Private
Mutual Community
NIB
NRMA Health
SGIC Health
SGIO Health
St Lukes

Cancel Select

If you do not have an Internet connection at your practice, contact Genie Solutions for a Genie Update CD to update the fees manually.

Updating Fees Manually

To import a fee schedule downloaded from the [Genie website](#) or from another source like the AMA website, firstly select **Open > Billing Items**.



BillingItems: 6979 of 6979 Records - Current User Dr Andrew Largeman

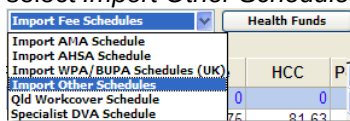
view all

Increase Fees Import Fee Schedules Health Funds

Assistant Threshold: \$547.90

Group	Item Num	Description	Private	Schedule	Rebate	IPRebate	GP Cons	DVA Out	DVA In	HCC	PMS
A3	104	Specialist, referred consultation - s	90.5	83.95	71.4	63	84.55	113.35	115.85	0	0
A3	105	Professional attendance by a spec	45.5	42.2	35.9	31.65	42.8	57	58.25	0	0
A3	106	- initial specialist ophthalmologist	75	69.7	59.25	52.3	70.3	94.1	96.15	0	0

Click on the **Import Fee Schedules** drop-down and select *Import AHSA Schedule* to import the AHSA fees, or select *Import Other Schedules* to import any other schedule.



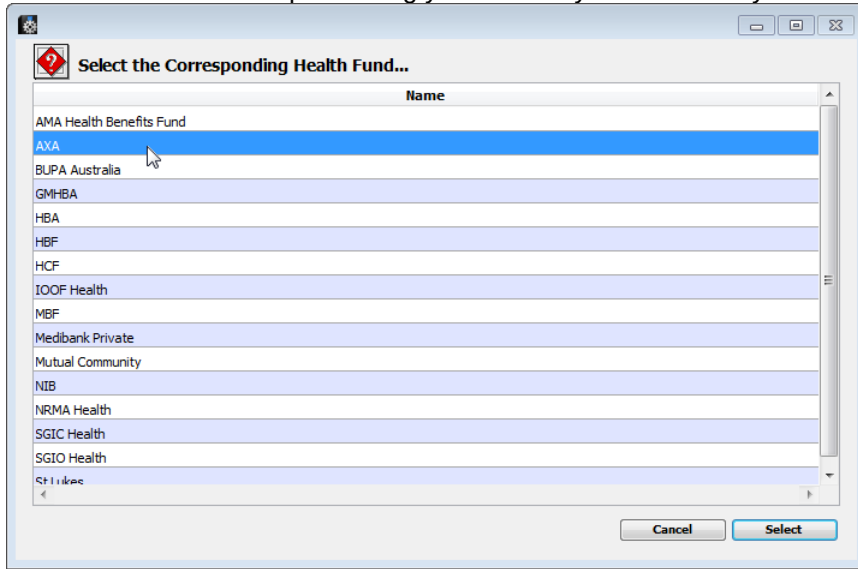
Import Fee Schedules

- Import AMA Schedule
- Import AHSA Schedule
- Import WPA/BUPA Schedules (UK)
- Import Other Schedules
- Qld Workcover Schedule
- Specialist DVA Schedule

Health Funds

HCC	P
0	0
75	81.63

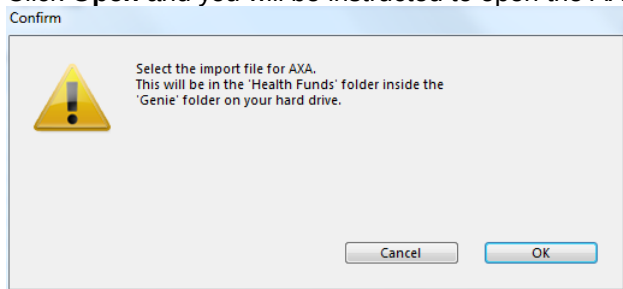
The window below will open asking you to identify the schedule you would like to import.



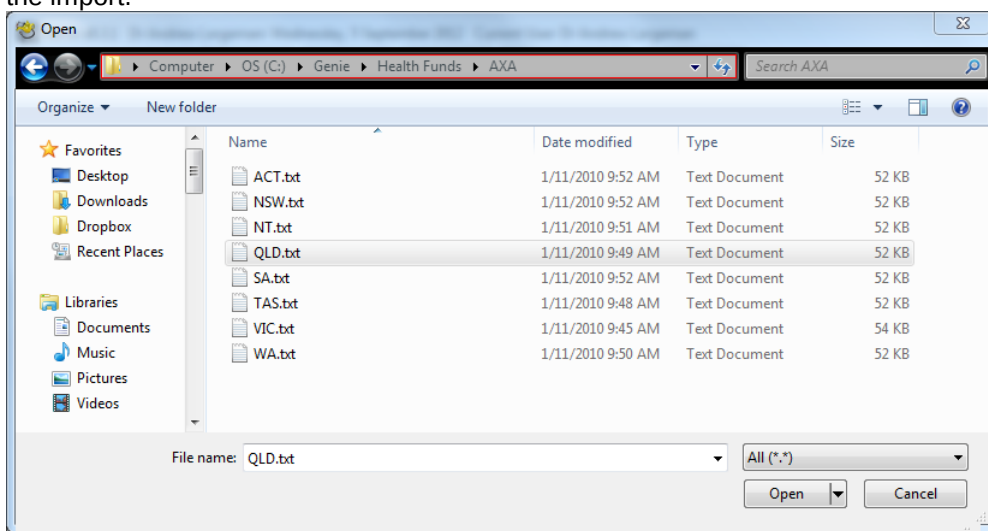
This list is made up of all the non-AHSA funds in your data file; any funds that have the *AHSA* tickbox ticked in the health funds list will be omitted. If you have entered multiple different names for AXA, or any of these other funds, it is important to either clean up your list of funds first, or perform this import for each different name you have used for a particular fund.

In this example we are going to import the AXA schedule.

Click **Open** and you will be instructed to open the AXA text file in the Health Funds folder.



Navigate to your Genie folder, double-click on Health Funds, then AXA, and open the file inside to commence the import.



Note: Some funds, such as AHSA and AXA, have a different schedule for each state, so it is important to also select the correct file for your state.

5.9 Account History

A patient's or an organisation's billing history can be viewed by selecting **Billing > Account History** from either the Patients list, the Appointment Book or the Account Holders list. Alternatively, you can access this by pressing **Ctrl+H**.

Account History for Samantha STATE

Statement Print Report Find Batch Reset Create Patient Claim Delete Patient Claim

Show Outstanding Itemised Receipt Resend IMC Exceptions Balance of displayed items: **\$1,597.50**
Blue cells can be modified with a slow double-click

INVOICES	Date	Provider	Patient	Item	Fee	Payment	Discount	Credit	Balance
04/09/12 99 BUPA	4/09/2012	Dr Andrew Largen	STATE, Samantha	40703	\$1,552.00	\$0.00	\$0.00	\$0.00	\$1,552.00
04/09/12 89 STATE, Samantha	4/09/2012	Dr Andrew Largen	STATE, Samantha	105	\$45.50	\$0.00	\$0.00	\$0.00	\$45.50
04/09/12 87 STATE, Samantha									
04/09/12 86 STATE, Samantha									
04/09/12 77 STATE, Samantha									
04/09/12 71 STATE, Samantha									
04/09/12 68 STATE, Samantha									
17/08/12 63 STATE, Samantha									
17/08/12 61 STATE, Samantha									
02/08/12 56 STATE, Samantha									
20/07/12 54 STATE, Samantha									
20/07/12 49 STATE, Samantha									
20/07/12 47 STATE, Samantha									
20/07/12 45 STATE, Samantha									
20/07/12 43 STATE, Samantha									
20/07/12 42 STATE, Samantha									
20/07/12 38 STATE, Samantha									

PAYMENTS

Type	Invoice	Date	Provider	Form	Amount
1	0	4/09/2012	Dr Andrew Largeman	EFTPOS	\$1,000.00

0-Payment
1-Deposit
2-Credit
3-Discourt

This window lists all invoices on the left with the account holder name shown in bold.

If the patient has any deposits, these will be displayed in the Payments area, down the bottom of the Account History window.

Click once to select an invoice and the items invoiced will be displayed in the top right hand side of the window, with any associated payments, credits, deposits, and discounts being displayed in the lower half of this window.

Clicking on the individual items of the selected invoice will highlight the associated payment for that item in the Payments area.

Shift+click will allow you to select a list of invoices and their associated details, while **Ctrl+click** allows you to select multiple specific invoices. **Ctrl+A** will highlight all invoices.

The *Item*, *Fee*, *Discount* and *Credit* columns can be modified by slow double-clicking to adjust the entered amounts.

Note: The Discount and Credit columns work on a cumulative basis, i.e the amount entered will be added to the existing amount.

You can view only unpaid invoices by clicking the **Show Outstanding** button.

In this window, you can use the buttons at the top to:

- Reprint invoices
- Print a statement
- Open and modify an existing invoice
- Change the account holder and/or the patient if an invoice has been billed to the wrong person or organisation
- Modify invoiced items
- Delete invoices, payments and deposits
- Apply a credit to invoiced items if they have been overcharged, or to write them off as a bad debt.

5.9.1 Reprinting an Invoice or Receipt

Reprinting an Invoice

Select the required invoice(s) from the left hand column of the Account History window and click on the **Printer** button

Account History for Samantha STATE

Statement Print Report Find Batch Reset Create Patient Claim Delete Patient Claim

Show Outstanding Itemised Receipt Resend IMC Exceptions

Balance of displayed items: **\$645.85**
Blue cells can be modified with a slow double-click

Date	Provider	Patient	Item	Fee	Payment	Discount	Credit	Balance
04/09/12	99	BUPA						
04/09/12	89	STATE, Samantha						
04/09/12	87	STATE, Samantha						
4/09/2012	Dr Andrew Largen	STATE, Samantha	41671	\$511.50	\$37.25	\$0.00	\$0.00	\$474.25
4/09/2012	Dr Andrew Largen	STATE, Samantha	41692	\$94.25	\$6.85	\$0.00	\$0.00	\$87.40
4/09/2012	Dr Andrew Largen	STATE, Samantha	41692	\$47.15	\$3.45	\$0.00	\$0.00	\$43.70
4/09/2012	Dr Andrew Largen	STATE, Samantha	105	\$45.50	\$0.00	\$5.00	\$0.00	\$40.50

Note: Medicare and DVA items won't print unless you have selected the Medicare DB4 and DVA Claims tickboxes respectively in Printing Preferences.

☒ DVA Claims ☒ Ask for Print Settings

☒ Medicare DB4 ☒ Ask for Print Settings

☒ Always Print Patient's Copy

Reprinting a Receipt

Select the invoice from the left hand column of the Account History window and then select the associated payment(s) in the Payments section. Click on the **Printer** button.

PAYMENTS

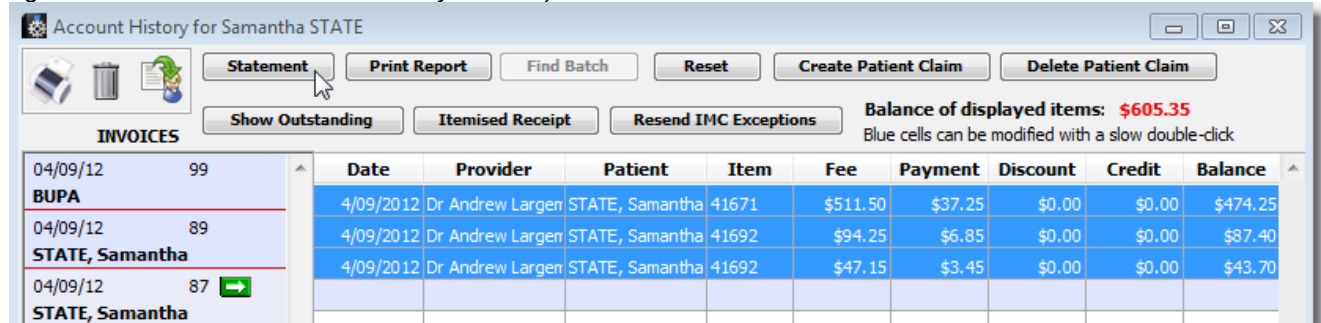
Type	Invoice	Date	Provider	Form	Amount
0	87	4/09/2012	Dr Andrew Largeman	EFTPOS	\$3.45
0	87	4/09/2012	Dr Andrew Largeman	EFTPOS	\$6.85
0	87	4/09/2012	Dr Andrew Largeman	EFTPOS	\$37.25

Print Delete

5.9.2 Printing a Statement

Highlight the relevant invoices on the left hand side of the Account History, and then highlight the items that you would like to include in the statement on the right.

Click on the **Statement** button. (This button will not be available until you highlight the relevant items in the top right hand side of the Account History window).

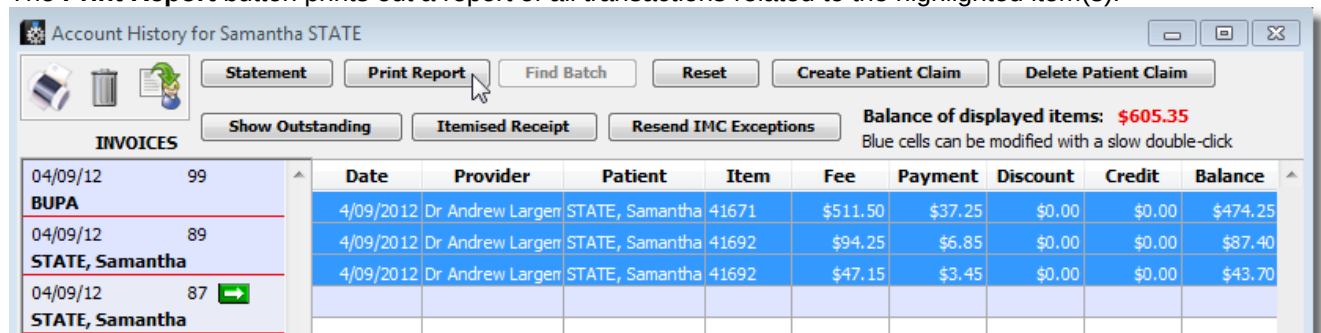


You can highlight adjacent items by **Shift+click**, or non-adjacent items by **Ctrl+clicking** on each item.

Note: You are only able to highlight multiple invoices on the left hand side when they are for the same account holder. If you highlight some items invoiced to Medicare, and some to the patient, you will not be able to print a statement.

5.9.3 Print Report

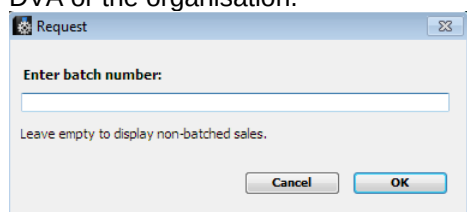
The **Print Report** button prints out a report of all transactions related to the highlighted item(s).



Follow the same steps as in [Printing a Statement](#).

5.9.4 Finding A Batch

The **Find Batch** button can be used to display all the items in a particular Medicare, DVA or other organisation's batch, assuming you have got to the Account History window from the Account Holders list for either Medicare, DVA or the organisation.



5.9.5 Itemised Receipt

You can print an itemised receipt by highlighting the required invoice in the *Invoice* column and clicking the **Itemised Receipt** button. This will print a receipt detailing the method and date of any payments for that particular invoice.

5.9.6 Modifying an Invoice

To modify an invoice, double-click on the invoice in the left hand column of the patient's account history.

This will display a form similar to the original invoice.

Self **Bulk Bill** **DVA** **Work cover** **Other**

Miss Cecilia CLINTON
122 Stanley Tce
TARINGA QLD 4068

Account Type: **Private**
Private Fund: **BUPA**

Invoice Date: 29/05/2017
Invoice No: 115701
Created By: Dr Miranda Lawson
Created Time: 12:25 PM

Add Item to Invoice Referring Doctor: **(None)** Distance Travelled: kms

Delete Item from Invoice Practice: **Genie Solutions Pty Ltd**

Site of Service: **Genie Solutions Pty Ltd**

Date	Patient	Provider	Item	Rebate	Fee	Discount	Balance
29/05/2017	CLINTON, Cecilia	Dr Miranda Lawson	105	\$36.55	\$172.00	\$0.00	\$172.00

☐ Inpatient Services

Invoice Memo: **Default**

Gap: **\$135.45**
☐ Pays Gap Only

GST Component: \$0.00
Total for this Invoice: \$172.00
Payment: **\$0.00**

Cancel **Save**

From here you can add and delete items from the invoice, alter the *Referring Doctor*, change the *Site of Service* or *Practice* as well as adding an *Invoice Memo*.

In this window you are able to:

- Add/Delete items from the invoice
- Select/Change the referring doctor
- Change the site of service or practice
- Add/Change the invoice memo
- Edit the individual item numbers in the Add Item to Invoice window (by double-clicking on an item.)

5.9.7 Modifying an Item

To change an actual item's details, either slow double-click in the item fee field or double-click on the item at the top right of the Account History and the Edit Sale window will open.

In this window, you must first click on the **Edit** button before you can change anything. This is to prevent you from accidentally overwriting an entry.

You can:

- Change the *Provider* in case you have accidentally billed it under the wrong provider
- Change the *Total Charge*, as long as the invoice has not already been paid or the updated fee is greater than the amount paid
- Change the *Item No* if the wrong item number has been billed

Note: Changing the item number does not automatically change the fee as well. You must manually adjust the fee.

- Change the *No. of Patients* (number of patients seen) if this was for a hospital or nursing home visit
- Change the *Service Date* and *Service Time*
- Change whether this is an *Inpatient Service*
- In the bottom left of this window is *Batch No*. If this item has been batched to Medicare, DVA or another organisation, then the Batch number will be inserted here. Deleting the Batch number automatically removes this item from the Batch.
- You can also enter a note into the *Notes* field e.g 'second visit', if you are manually batching.
- If you are using HIC Online (Medicare Online), a number of override options also appear in this window relating to inpatient services, same day services etc.

Once you have made the necessary changes click on the **Save** button to close this window.

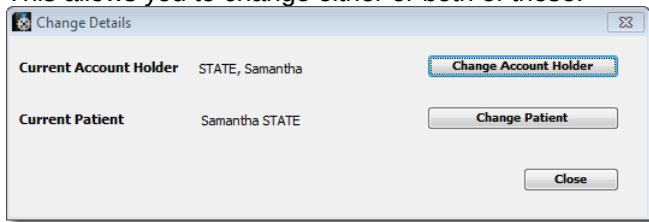
Note: Changes made in this way create an audit record which can be traced back to the date and time of the change and the log-in name of the person making the changes (File > Maintenance & Reports: Administrator).

5.9.8 Changing the Account Holder or Patient

If an item has been billed to the wrong patient or account holder, highlight the invoice in the left hand column and

click on the **Change the Account Holder or Patient** button .

This allows you to change either or both of these.



A dialog box titled "Change Details" with a close button in the top right. It contains two sections: "Current Account Holder" with the text "STATE, Samantha" and a "Change Account Holder" button, and "Current Patient" with the text "Samantha STATE" and a "Change Patient" button. At the bottom is a "Close" button.

The changes are automatically made to any associated payments.

Note: Changing the patient does not automatically change the account holder, ensure you change the account holder to the patient's name before changing the Current Patient.

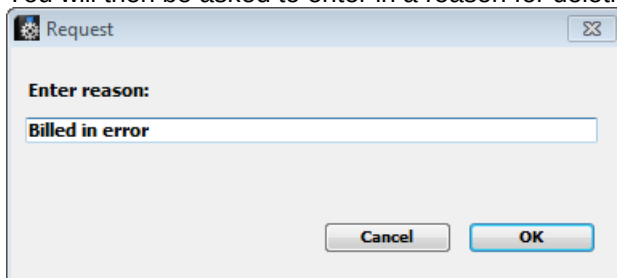
5.9.9 Deleting an Invoice

It is possible to delete an invoice if the *Allow Invoices to be Deleted* tickbox is selected in the **Practice Details** tab of Practice Preferences (**File > Practice Preferences**). This tickbox can only be selected by the Administrator of Genie, or someone with access to this password.

Having this checked does increase the risk of fraud, however it can be very useful in those situations where a transaction has been processed by mistake.

Highlight the invoice on the left to be deleted. Click on the **Garbage can** button .

You will then be asked to enter in a reason for deleting the invoice.



A dialog box titled "Request" with a close button in the top right. It contains a label "Enter reason:" followed by a text input field containing the text "Billed in error". At the bottom are "Cancel" and "OK" buttons.

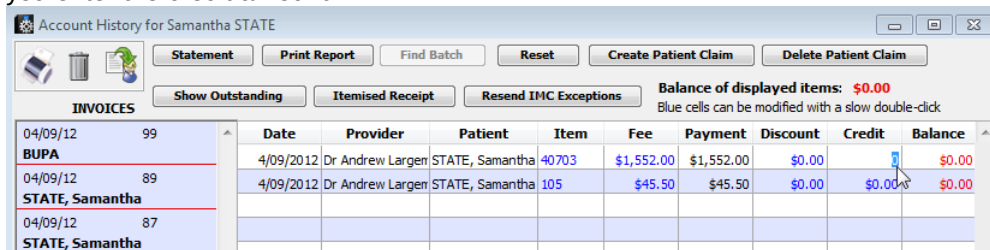
This reason will then be recorded in the Audit trail, along with the date and time of deletion, as well as the user account used to delete the invoice.

5.9.10 Applying a Credit to an Invoice

Credits should only be applied to an item to write off a bad debt. User error can generally be handled by editing the invoice directly (see [Modifying an Invoice](#) and [Modifying an Item](#)).

Note: DO NOT USE THIS TO RECEIPT INVOICES.

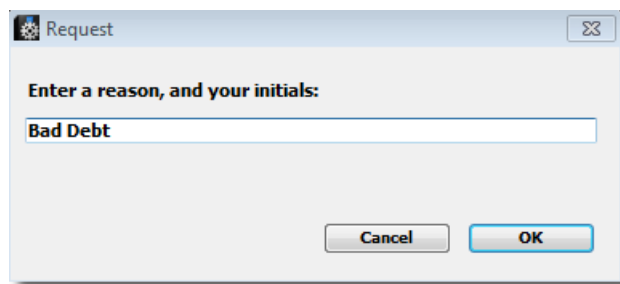
To apply a credit, slow double-click in the credit column of the item. This will highlight the existing zero, and allow you enter the credit amount.



A screenshot of the "Account History for Samantha STATE" window. It features a toolbar with buttons: Statement, Print Report, Find Batch, Reset, Create Patient Claim, and Delete Patient Claim. Below the toolbar is a section for "INVOICES" with buttons: Show Outstanding, Itemised Receipt, and Resend IMC Exceptions. A table displays invoice data with columns: Date, Provider, Patient, Item, Fee, Payment, Discount, Credit, and Balance. The table shows two rows of data for 04/09/2012. The first row has a fee of \$1,552.00 and a balance of \$0.00. The second row has a fee of \$45.50 and a balance of \$0.00. The "Credit" column for the second row is highlighted in blue, and a mouse cursor is hovering over it. A status bar at the bottom indicates "Balance of displayed items: \$0.00" and "Blue cells can be modified with a slow double-click".

Date	Provider	Patient	Item	Fee	Payment	Discount	Credit	Balance
04/09/2012	Dr Andrew Largen	STATE, Samantha	40703	\$1,552.00	\$1,552.00	\$0.00	\$0.00	\$0.00
04/09/2012	Dr Andrew Largen	STATE, Samantha	105	\$45.50	\$45.50	\$0.00	\$0.00	\$0.00

Once you have entered the credit, a prompt will appear asking you for the reason for this credit and your initials (this will default to "Bad Debt").



Request

Enter a reason, and your initials:

Bad Debt

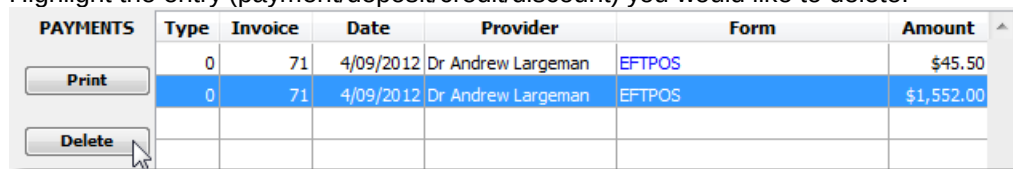
Cancel OK

If there is an existing credit against this item, the credit amount will change to zero when you highlight it, but the new credit amount will be added to the previous amount once you save this.

Once you click on the **OK** button, a credit record will be created and displayed in the Payments area at the bottom of the Account History window.

5.9.11 Deleting a Payment

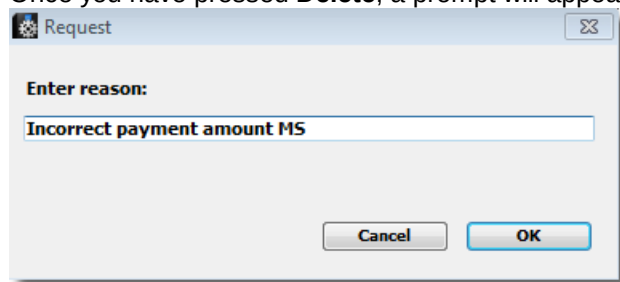
Highlight the entry (payment/deposit/credit/discount) you would like to delete.



PAYMENTS	Type	Invoice	Date	Provider	Form	Amount
Print	0	71	4/09/2012	Dr Andrew Largeman	EFTPOS	\$45.50
	0	71	4/09/2012	Dr Andrew Largeman	EFTPOS	\$1,552.00
Delete						

Click on the **Delete** button to the left of the Payments area.

Once you have pressed **Delete**, a prompt will appear asking you for the reason for deletion.



Request

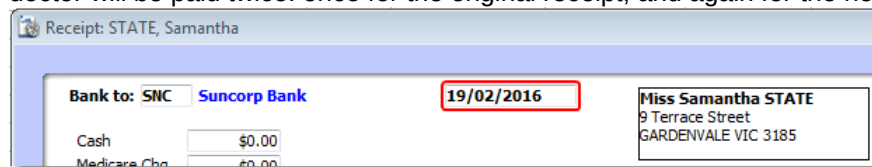
Enter reason:

Incorrect payment amount M5

Cancel OK

This will be recorded in the Audit trail (**File > Maintenance & Reports, Administrator tab, Audit**). For any enquiries regarding the functionality Audit trail, please contact our support line.

If you plan to re-receipt this item, you should change the date in the Receipt window (see below) to the date you actually received payment; this is because practices that pay their doctors on the basis of receipts (as opposed to invoices) may have already paid their doctors for this receipt. If you then receipt this with the current date, the doctor will be paid twice: once for the original receipt, and again for the new receipt.



Receipt: STATE, Samantha

Bank to: SNC Suncorp Bank

19/02/2016

Miss Samantha STATE
9 Terrace Street
GARDENVALE VIC 3185

Cash \$0.00
Medicare Chg \$0.00

5.9.12 Using a Dummy Bank Account (Refunding a Payment)

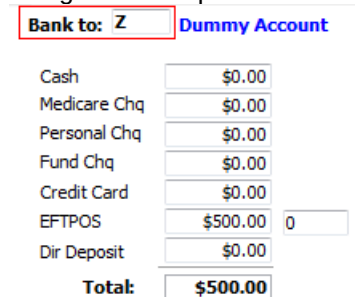
Sometimes you may need to reverse a payment in a sealed banking batch, and then re-receipt the patient. If you receipt this payment normally, your daily banking will be incorrect as you did not actually receive payment on that day. In this case, you should use a dummy bank account to store the payment.

To use a dummy bank account, you will need to have one configured in your Bank Accounts list (**Open > Bank Accounts**). If you have created one with one of our support representatives (or your installer), the code for this

will likely be Z. If you cannot see this in your bank accounts list, you are able to create one using the blue plus button . For more details on creating bank accounts, see [Bank Accounts](#) in the Setting Up Genie section.

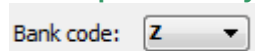
Note: As this is not a genuine bank account, you do not need to worry about adding any more detail than the Bank Code (Z) and Bank Name (Dummy Account). The other fields can remain blank.

Assign the receipt to the Dummy Account by entering the code (Z) into the top left of the receipt window.



Payment Type	Amount
Cash	\$0.00
Medicare Chq	\$0.00
Personal Chq	\$0.00
Fund Chq	\$0.00
Credit Card	\$0.00
EFTPOS	\$500.00
Dir Deposit	\$0.00
Total:	\$500.00

Once you have receipted the payment to the dummy account, you must seal the payment into its own banking batch to separate it from your actual banking. To do this open the Daily Banking Report (**File > Maintenance and Reports > Daily**) and select the code (Z) from the drop-down menu at the top of the window.



When this code is selected, only the dummy payment(s) will be displayed. Seal the batch as you normally would; your real banking report will be unaffected and correct.

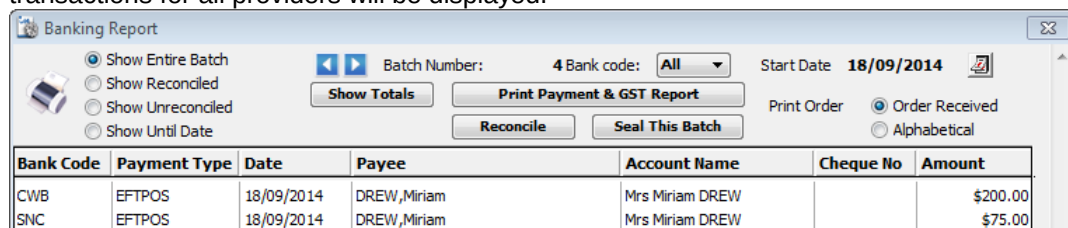
5.10 Banking

To configure Bank Accounts, see the [Bank Accounts](#) section in Setting Up Genie.

To reconcile your banking at the end of the day go to **File > Maintenance & Reports** and click on the **Daily** tab.



Click on the **Daily Banking Report** button to view the current batch. By default, all unsealed banking transactions for all providers will be displayed.



Bank Code	Payment Type	Date	Payee	Account Name	Cheque No	Amount
CWB	EFTPOS	18/09/2014	DREW, Miriam	Mrs Miriam DREW		\$200.00
SNC	EFTPOS	18/09/2014	DREW, Miriam	Mrs Miriam DREW		\$75.00

Button Explanations

Please refer to the example situations in the next section for the practical use of these buttons.

Bank Code: Used to restrict transactions for one bank account. This would commonly be used in a multi-doctor practice where different doctors have different bank codes.

Start Date: Only used when you need to see transactions starting at a specific date. The default date displayed will be the date of the earliest receipted transaction for the current banking batch.

Show Totals: Gives the total of each payment type without detail.

Print Payment & GST Report: If you bill GST, this shows the breakdown of GST in the batch. This is only used if you bank GST separately.

Reconcile: Used to mark the displayed transactions as reconciled. This allows you to separate reconciled and unreconciled transactions using the Show Unreconciled radio button.

Seal this batch: Used to seal the current batch without printing the Banking Report. This process is irreversible.

Show Until Date: Used to display only transactions prior to the specified date. This would commonly be used when you come in on a Monday and find that the batch was not sealed on Friday. Entering Friday's date in the Show Until Date field will allow you to seal Friday's transactions without sealing Monday's transactions.

Printer Button: once you have reconciled and you are ready to go to the bank, you can press this button to print the Banking Report. This window will allow you to specify how many copies of this report you would like to print, and whether you would like to print EFTPOS separately. Once you have printed this, Genie will remind you to seal your banking.

Print Order: These radio buttons dictate what order the banking records will appear in when the report is printed. Under each separate tender, the records will appear in the order they were receipted or in alphabetical order by account holder, depending on your selection.

Note: To move forward and backward through your batches, click on the forward and backward arrows at the top of the Banking Report window. It is important to note that Genie only retains 260 banking batches (this equates to creating one batch every weekday for one year). If you require banking totals outside that time period, please consult the Banking Summary in the Practice Analysis tab.

If You Bank Every Day

If you physically bank everyday, you simply need to click on the **Print** button in the top left of the this window. You will receive a prompt asking how many deposit slips you would like printed; usually, you would select two - one for the bank and one for your own records. There is also the option to print EFTPOS and direct deposits on a separate page. A separate report is generated for each bank code if you have more than one. Once you have printed this report, you should reconcile it against what you have in the till.

Note: If a receipt has been recorded as the wrong type e.g. a cheque instead of cash, you can double-click on the relevant bank record and correct this with the *Payment Type* drop-down menu. Do not change this payment type in the Payments section of the Account History.

Once you have reconciled, click on the **Seal This Batch** button. This seals off the current batch so that any subsequent receipts will go into the next batch.

If You Don't Bank Every Day

If you don't bank every day, but still would like to reconcile the till, follow the procedure detailed below.

On Day 1:

Print the report and reconcile it with the till. Click on the **Reconcile** button to mark the displayed records as having been reconciled. Bundle the monies with the bank deposit slip

On Day 2:

Click on the *Show Unreconciled* radio button to display everything that has been receipted since you reconciled on Day 1. Print the report and again reconcile with the till. Click on the **Reconcile** button again to mark the records from Day 2 as reconciled. Bundle the monies with the bank deposit slip

Day 3 (Banking Day):

Click on the *Show Unreconciled* radio button to display everything that has been receipted since you reconciled on Day 2. Print the report and again reconcile with the till. Click on the *Show Entire Batch* radio button to display all receipts for Day 1, 2 and 3. Click on the **Seal This Batch** button. Take your three bundles of deposits to the bank.

If You Forget To Seal

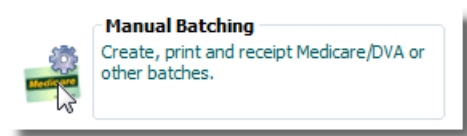
Click *Show Until Date*, enter the date the banking was meant to be sealed, and click on **Seal This Batch**. If you then close and reopen the banking report, only today's banking will be listed.

Note: This is NOT the GST report used for taxation purposes; this is located by going into File > Maintenance & Reports and clicking on the Practice Analysis tab.

5.11 Manual Batching

Manual batching of invoices is used for Medicare and DVA bulk-billing where HIC Online is not being used, or for private health funds and hospitals who may prefer to receive a weekly or monthly batch of invoices for services performed.

Select **File > Maintenance & Reports, Daily** tab, and click on the **Manual Batching** button to open the Manual Batches window.



This window displays on the left, a list of previous batches which are awaiting payment and receipting.

Manual Batches window showing a list of claims. The window has buttons: Receipt, Clear Batch, New Batch, Reprint, Finalise, and Close. Below the buttons are radio buttons for 'Show Finalised' and 'Show Unpaid'. The 'Show Unpaid' radio button is selected. A table lists claims with columns: Claims, Find, Date, Form, Patient Name, Item No, Fee, and Balance.

Claims	Find	Date	Form	Patient Name	Item No	Fee	Balance
DVA0001	M	26/02/2016					
B00021	M	26/02/2016					

Clicking on the *Show Finalised* radio button will display batches which have been receipted already.

Clicking on a Batch on the left will display the items in that batch in the list on the right.

Manual Batches window showing items for a selected batch. The window has buttons: Receipt, Clear Batch, New Batch, Reprint, Finalise, and Close. Below the buttons are radio buttons for 'Show Finalised' and 'Show Unpaid'. The 'Show Unpaid' radio button is selected. A table lists items with columns: Claims, Find, Date, Form, Patient Name, Item No, Fee, and Balance.

Claims	Find	Date	Form	Patient Name	Item No	Fee	Balance
DVA0001	M	26/02/2016	19/04/2012	3 BROWN, Ella	105	\$35.15	\$35.15
B00021	M	26/02/2016	19/02/2016	6 CLINTON, Cecilia	104	\$72.75	\$72.75

You can delete a batch by highlighting it and then clicking on the **Clear Batch** button. This doesn't delete any of the items. It simply removes them all from the batch so that they will appear in the next batch created.

A batch can be reprinted at any time by clicking on the **Reprint** button.

Manual Batches window showing the **Reprint** button highlighted. The window has buttons: Receipt, Clear Batch, New Batch, Reprint, Finalise, and Close. Below the buttons are radio buttons for 'Show Finalised' and 'Show Unpaid'.

If a batch has been fully receipted, but for some reason isn't showing as finalised, click **Finalise** to finalise this manually.

5.11.1 Creating a New Batch

To create a new batch, click on the **New Batch** button.

Select the type of batch from the radio buttons at the top of the window i.e. *Medicare, DVA or Other*.

Select Type -> ☒ Medicare ☐ DVA ☐ Other

Note: Clicking on the **Other** radio button will display a list of account holders that have the **Batch Process Invoices** tickbox ticked in their account holder record in **Open > Account Holders**. eg. health funds/overseas students' batches.

In this example, we will click on the **Medicare** button. This makes visible a menu from which we can choose the *Provider*.

Once a provider is selected, a *Select Site* menu appears, in case there are multiple sites with different provider numbers.

Note: If you are creating a batch for **Other**, then this menu does not appear, as it isn't necessary to split the batch into different sites.

Once a site is selected, a field for the *Batch No* becomes visible.

For Medicare and DVA it is a good idea to use the batch numbers on the DB1 manual batch headers sent to you by HIC, or you can make up your own batch numbers. It is a good idea to make the batch number consist of 2 letters followed by 4 numbers, the first letter being the type of batch it is e.g. for a Medicare Batch use something like 'MA0001'. Make the next batch 'MA0002' and so on.

This will avoid any conflicting batch numbers if you move to HIC Online, where the batch numbers are automatically generated in the format of a single letter followed by 4 numbers.

Once you have entered a batch number, press **Tab** and you will notice that this batch number is applied to all the items in this list.

Patient	Provider	Inv. No	Date	Form No.	Item No.	Total Fee	Balance	Batch No.
CLINTON, Cecilia	Dr Miranda Lawson	325	1/02/2016	7	105	\$36.55	\$36.55	
CLINTON, Cecilia	Dr Miranda Lawson	325	1/02/2016	7	12000	\$33.15	\$33.15	
PEARSON, Nadia	Dr Miranda Lawson	327	26/02/2016	8	104	\$72.75	\$72.75	
PEARSON, Nadia	Dr Miranda Lawson	327	26/02/2016	8	30078	\$41.20	\$41.20	
STATE, Samantha	Dr Miranda Lawson	329	26/02/2016	9	110	\$128.30	\$128.30	

If you are batching to Medibank Private, and you also do batches for Overseas Students, you will get an extra prompt:

If there are items that need to be withheld from this particular batch, highlight by holding **Ctrl** while selecting each item, and then use the **Remove Highlighted** or **Keep Highlighted** buttons as appropriate. Any removed

items will appear in the next batch created.

Please note: The maximum number of items permitted in a manual batch is 25. Where a batch would have more than 25 items, Genie will separate the extra invoice(s) in the list into a subsequent batch.

For Medicare and DVA batches it is a good idea to **Print List** before saving, and mark off what is in your batch with your manual vouchers; the manual vouchers are what must be sent to Medicare/DVA.

The final step is to click on the **Save** button. This will print a Summary Sheet of all the items in the batch, and for DVA, a DB1 form for the provider to sign before the paperwork is mailed.

The New Batch window will automatically close, and the new batch will appear in the list of batches awaiting payment.

5.11.2 Receipting a Batch

When you receive payment for a manual batch from Medicare, DVA or another organisation, you must receipt it through the Manual Batches window also.

To do this, highlight the batch to be receipted in the list of batches on the left of the Manual Batches window, and then click on the **Receipt** button.

The screenshot shows the 'Manual Batches' window with the 'Receipt' button highlighted. Below the buttons, there are radio buttons for 'Show Finalised' and 'Show Unpaid'. A table lists claims with columns: Claims, Find, Date, Form, Patient Name, Item No, Fee, and Balance.

Claims	Find	Date	Form	Patient Name	Item No	Fee	Balance
DVA0001	M	26/02/2016	19/04/2012	3 BROWN, Ella	105	\$35.15	\$35.15
B00021	M	26/02/2016	19/02/2016	6 CLINTON, Cecilia	104	\$72.75	\$72.75

The usual Receipt window will open as shown below.

The screenshot shows the 'Receipt: Medicare' window. It includes fields for 'Bank to: SNC Suncorp Bank', 'Date: 26/02/2016', and 'Medicare'. Below these are input fields for various payment methods: Cash, Medicare Chq, Personal Chq, Fund Chq, Credit Card, EFTPOS (\$107.90), and Dir Deposit (\$0.00). The 'Total' is \$107.90. A green message states '\$107.90 remains to be allocated'. There is an 'Auto-Fill' button with a tooltip '*CTRL-A*'. Below this is a table with columns: Date, Invoice, Provider, Patient, Item, Fee, Discount, Balance, Payment, and Remove.

Date	Invoice	Provider	Patient	Item	Fee	Discount	Balance	Payment	Remove
19/04/2012	5	Dr Miranda Lawson	BROWN, Ella	105	\$35.15	\$0.00	\$35.15	\$0.00	☐
19/02/2016	324	Dr Miranda Lawson	CLINTON, Cecilia	104	\$72.75	\$0.00	\$72.75	\$0.00	☐

At the bottom, there are buttons for 'Cancel', 'Apply Deposit', 'Store', and 'Print'. The 'Balance Owing' is \$107.90.

Enter the cheque amount in *Medicare Chq* for Medicare and DVA, or *Fund Chq* for a Private Fund or other organisation.

If the cheque amount exactly equals the amount you have claimed (an unusual occurrence!), then all you have to do is click on the **Auto-Fill** button and then click on the **Store** button to save the Receipt. (There's no need to

print a receipt for Medicare or DVA).

Dealing With Exceptions

Quite often Medicare or DVA will either not have paid for a particular item at all, or will have paid a different fee to that claimed.

In this case, we need to either fix the problem with the item that is preventing them from paying, and then remove that item from the batch and resend it with the next batch. Or, we need to adjust the fee charged to match what they have agreed to pay.

If, for example, we have forgotten to enter in the Item Notes field that this was a second visit on the same day, then Medicare will usually refuse to pay. In this case, we first need to fix the problem.

You do this by double-clicking on the item in the Receipt window. This will open the Edit Sale window.

Before you can make any changes in this window, you must first click on the **Edit** button. Then enter "2nd visit etc." in the **Notes** field. Click on the **Save** button to close this window. Then click on **Remove Item From Batch** to remove the item from this batch, so that it will be resent with the next batch.

If Medicare/DVA is paying the item but at a different amount, double-click on the item to open the **Edit Sale** window above. Click on the **Edit** button, and change the fee to whatever they are paying. This will then leave a record in the Audit Trail. Click on the **Save** button to close the record, but do NOT remove it from the batch.

Work through each problem item in this way until you have dealt with them all. At this stage your claimed amount should equal your paid amount and you can click on the **Autofill** button to automatically allocate the correct payments against each item.

Finally, click on the **Store** button to save the receipt.

This batch will now be listed in the **Show Finalised** column of the Manual Batches window.

Note: If Medicare, DVA, or another organisation pay for multiple batches on the one cheque, receipt each batch separately using the batch total, not the cheque total, and use the same cheque number which will then total correctly on the banking report.

5.12 Online Claiming Installation

Note: Since October 2005, the HIC has operated under the name 'Medicare Australia'. We have retained references to 'HIC' to maintain consistency with the program and familiarity with our users.

HIC Online is a facility which enables claims to be made directly to the HIC using secure transmissions over an Internet connection.

HIC Online provides the following functionality:

- Bulk Bill
- DVA
- Patient Claims (both real-time and batched)
- ACIR
- Online patient Medicare verification
- Online patient health fund transmissions through ECLIPSE (registered users only)

HIC Online relies on PKI (Public Key Infrastructure) technology to ensure all communications with the HIC are conducted securely and confidentially. The use of PKI guarantees that messages are sent from a known and trusted source, cannot be read by anyone but their intended recipients, the contents haven't been tampered with in transit, and that the sender cannot dispute that they created and sent the message.

Note: HIC ONLINE VERSION 6.10.28 OR LATER IS REQUIRED IF JAVA VERSION 1.6 IS INSTALLED

In order to start using HIC Online you must:

- Get a HIC location (minor) ID from Genie Solutions. If you are a registered Genie user you automatically have one allocated. It is made up of 'GEN' followed by a five digit number. Check in the top right hand corner of your Appointment Book if you are unsure.
- Register for Online Claiming with Medicare Australia and apply to for a Healthcare Location Certificate for your practice. You may also apply for a Healthcare Individual Certificate for each provider although this is not required to use HIC Online. If you would like to use them, Individual certificates should be requested on iKeys rather than SmartCards. You can obtain the necessary application forms at <http://www.medicareaustralia.gov.au/provider/business/online/register/index.jsp> or by calling 1800 700 199. If you are unsure about this process, call Medicare Australia clarify. The Location Certificate is provided on a CD. The Individual Certificates are provided on iKeys -small tokens - which plug into a USB port on your computer.
- Have your Genie software updated to allow use of HIC Online.

There are five steps to follow to ensure a successful installation. The steps should be performed in the following order (links have been provided to each relevant section):

1. [Update Genie](#).
2. Install the [Mac](#) or [Windows](#) HIC Online components through the Software Updates in the Special menu in Genie. If you do not have an internet connection, you install these components from a recent Genie CD.
3. Install the iKey Drivers (only if you are using individual certificates).
4. [Configure Genie](#) for HIC Online use.
5. [Create the PSI Store](#) in Genie.

Important: You must be logged in as both the administrator for the local machine, and as the Genie administrator.

Note: If you are using an iKey, do not connect it to your computer yet. This will be done at a later stage in the process.

5.12.1 Install/Upgrade Genie

Before attempting to install the HIC Online components, it is recommended that you update to the latest version of Genie. More information on this procedure can be found in the [Updates](#) section.

5.12.2 Install HIC Online - Windows

Important: Before commencing the HIC Online installation, the computer must be logged in as the 'Administrator' or a user with administrative rights. This ensures that all installed files and folders have their permissions set correctly.

Installing/Updating HIC Online Via Software Updates

1. Go into **Special > Software Updates**.
2. Tick the checkbox on the left hand side next to *HIC Online*.
3. Click on **Install 1 Item** at the bottom of the window.
4. When prompted as to whether you would like to store the update or apply now, select **Apply Now**.
5. You will receive a prompt stating that 'This update requires Genie to restart on this computer', press **OK**.

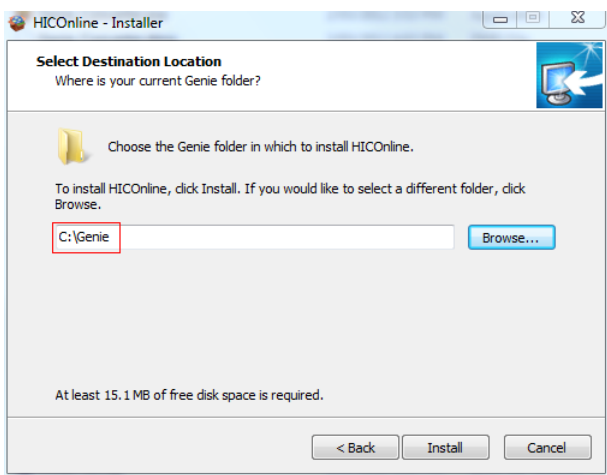
Once the update has finished and Genie has restarted, HIC Online is ready to use.

Installing/Updating HIC Online Via CD

1. Insert the Genie CD into the machine(s) from which you would like to perform HIC Online transmissions. This will either be the standalone machine for a Genie Single User, or a client machine for a Genie network. If the Genie Setup program starts, press the **Cancel** button to exit it.
2. You must have previously opened and logged into Genie at least once on this machine before performing this installation.
3. Quit Genie or Genie Client if they are running.
4. Using Windows Explorer, view the contents of the Genie CD.
5. Double-click on the HIC Online folder to open it.
6. Double-click on the HIC_Online_Installer.exe program to commence the installation.



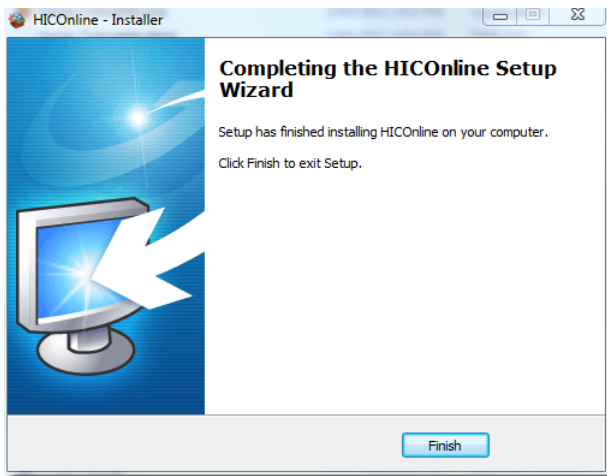
7. You are presented with the Welcome window. Click on the **Next** button to continue.
8. You are presented with the Select Destination window.



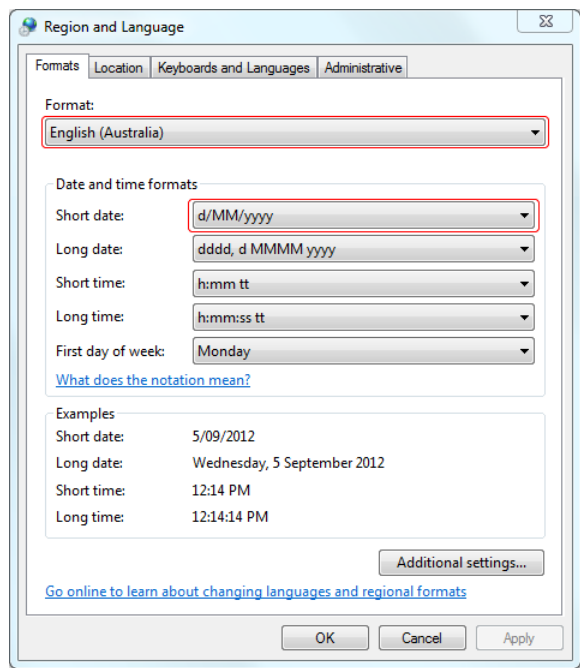
9. Choose the Genie folder in which to install HIC Online. This will normally be C:\Genie, unless you previously installed Genie into a different folder.
10. Click **Install**.

A window will display the progress of the installation. The installer may automatically install the appropriate Java Runtime Environment. If so, be patient and do not Cancel the Java installation or configuration progress windows.

When the HIC Online installation is complete, the following window is displayed.



Open the Regional Options in Control Panel (**Start > Control Panel > Region and Language**) and ensure that region is set to English (Australia). Also ensure that the date separator is set to a forward slash, i.e. '/'.



5.12.3 Install HIC Online - Macintosh

Important: Before commencing the HIC Online installation, the computer must be logged in as the 'Administrator' or a user with administrative rights. This ensures that all installed files and folders have their permissions set correctly.

Installing/Updating HIC Online Via Software Updates

1. Go into **Special > Software Updates**.
2. Tick the checkbox on the left hand side next to *HIC Online*.
3. Click on **Install 1 Item** at the bottom of the window.
4. When prompted as to whether you would like to store the update or apply now, select **Apply Now**.
5. You will receive a prompt stating that 'This update requires Genie to restart on this computer', press **OK**.

Once the update has finished and Genie has restarted, HIC Online is ready to use.

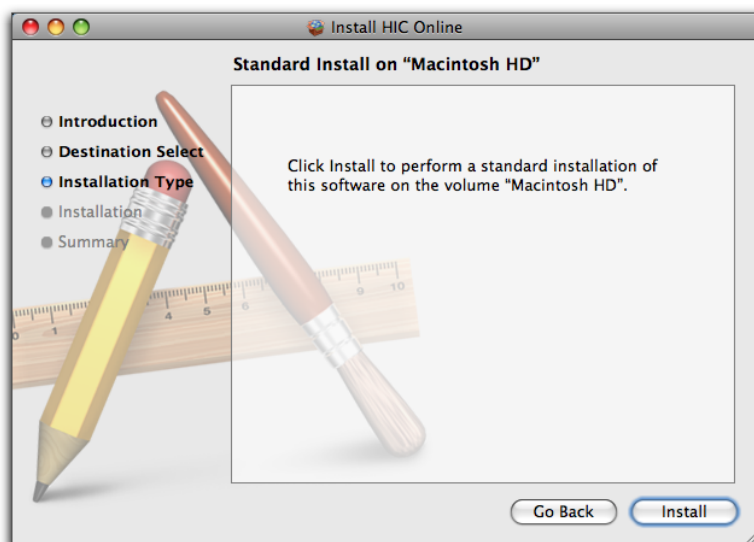
Installing/Updating HIC Online Via CD

1. Insert the Genie CD into the machine(s) from which you would like to perform HIC Online transmissions. This will either be the standalone machine for a Genie Single User, or a client machine for a Genie network.
2. You must have previously opened and logged into Genie at least once on this machine before performing this installation.
3. Quit Genie or Genie Client if they are running.
4. Using Finder, view the contents of the Genie CD.
5. Double-click on the HIC_Online_Installer.mpkg program to commence the installation.

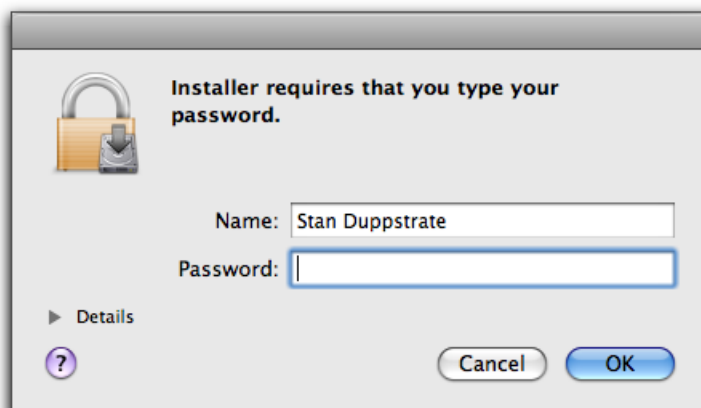


HIC_Online_Installer.mpkg

6. You are presented with the Welcome window. Click on the **Continue** button.
7. You are presented with the Installation Type window.



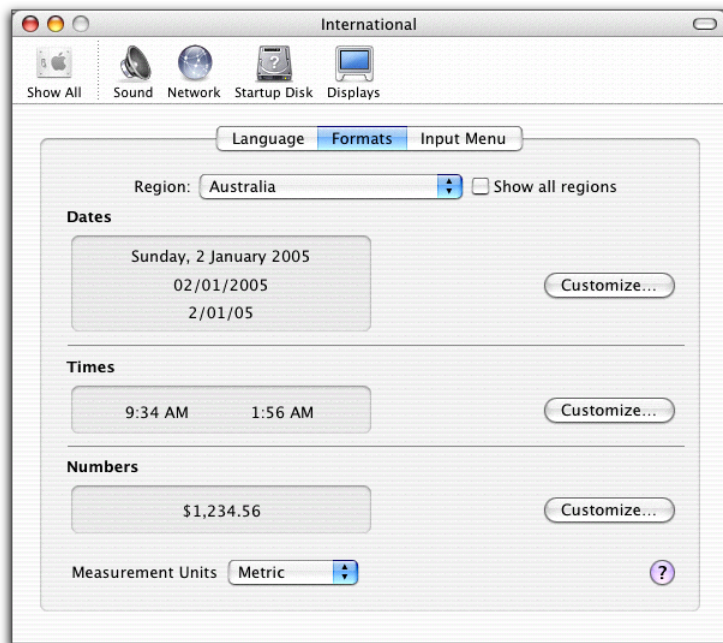
8. Click on the **Install** button.
9. You will be prompted to enter the username and password of an Administrator user on your computer. This is a Mac OSX Administrator user and is **not** the same thing as the Genie user chosen to be the Administrator in Genie.



10. Enter the name and password of an Administrator and click on the **OK** button.

The HIC Online installation then completes.

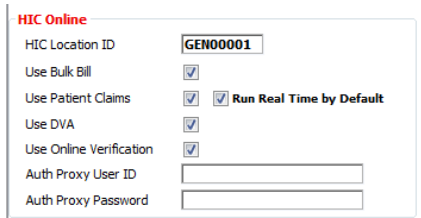
Open the International Control Panel in System Preferences, click on the **Formats** tab and ensure that region is set to Australia. Also ensure that the date separator is set to a forward slash, i.e. '/'.



5.12.4 Configure Genie

Now that all of the required software has been installed, the next step is to configure Genie to use HIC Online.

Go to **File > Practice Preferences** and double-click the relevant clinic name, then click the **Miscellaneous** tab.



If you are a registered Genie user, your HIC Location ID (the same as your GEN number) should already be entered. Contact Genie Solutions if you are unsure of your HIC Location ID.

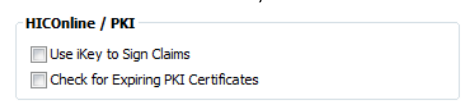
Tick the tickboxes to select the HIC Online functions you would like to use. If you will be doing Real-Time Patient Claims and would like to use this as the default (as opposed to Batched Patient Claims), tick the *Run Real Time by Default* tickbox.

If you access the Internet through a proxy server that requires authentication, you can enter the User ID and Password here. Otherwise leave these fields blank.

Save the Practice Preferences.

Note: If you have more than one location certificate, it will be necessary to create a Practice Preferences record with a new HIC Location ID for each additional location certificate.

If any of the providers will be using an iKey to sign their claims, go to **File > All User Preferences**, double-click on the doctor's name, and tick the *Use iKey to Sign Claims* tickbox in the **Misc.** tab.

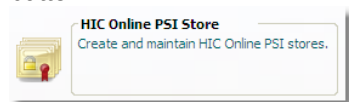


If you would like to receive a warning when your PKI certificates are approaching their expiry date, you can tick the *Check for Expiring PKI Certificates* tickbox. This only needs to be done for one user who will then be prompted when they login of any certificates that will expire within the next 30 days. If no users have this preference ticked, Genie will automatically do this check and prompt the first user to log in.

5.12.5 Create the PSI Store

The final step is to import your location (and if you are using iKeys, your Individual certificates) to a central repository. This repository, hereafter referred to as the PSI Store, consists of a single file normally named as your HIC Location ID followed by .psi (e.g.GEN00001.psi).

Login to Genie. Go to **File > Maintenance & Reports, Administrator** tab. Click on the **HIC Online PSI Store** button.



There are two ways to create a PSI store:

1. **Creating a New PSI Store**
Use this option if you have never used HIC Online before and you have the CD from Medicare Australia and any iKeys you would like to use.
2. **Importing an Existing PSI Store**
Use this option if you have already created a PSI store and you would like to use it from HIC Online within Genie.

1.Creating a New PSI Store

Insert the CD containing your location certificate.

Click on the **Blue plus** button  to create a new PSI Store.

The Create PSI Store window will open.

If you are using more than one location certificate, you must select the HIC Location ID this PSI store will be used for from the drop-down list at the top. Default names and locations for the certificate files will automatically be filled in; these should normally be correct but may be changed here using the **Browse...** buttons.

Follow the red prompts at the bottom of the window to complete the fields on the form. Remember that passwords are case-sensitive. Location Passphrase is also known as the PIC code and should have been received in the mail separately to your Location Certificate CD.

Once all of the fields have been successfully filled in, the **OK** button will be enabled. If it is not enabled, rectify the problem identified by the red prompt at the bottom of the window.

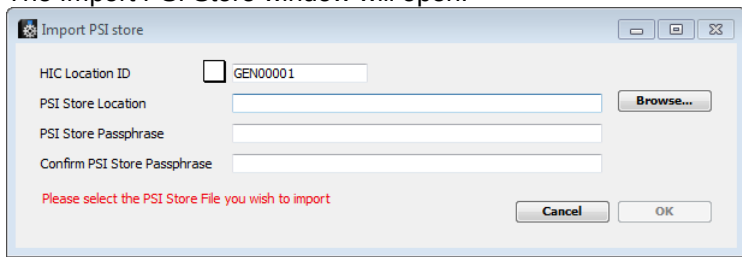
Note: It is very important to type in the Location Passphrase correctly the first time, failure to do this can cause errors. If you suspect this has happened, please contact Genie support for further instructions.

Click on the **OK** button to create the new PSI store.

2. Importing an Existing PSI Store

Click on the **PSI Store Import** button .

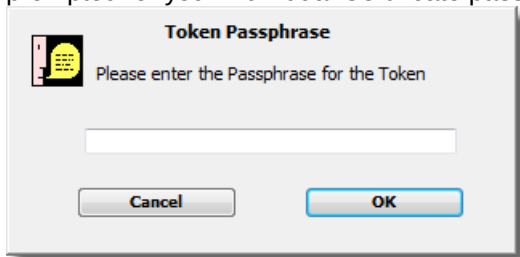
The Import PSI Store window will open.

The 'Import PSI store' window is a standard Windows-style dialog box. It contains the following fields: 'HIC Location ID' with a dropdown menu showing 'GEN00001'; 'PSI Store Location' with a text box and a 'Browse...' button; 'PSI Store Passphrase' with a text box; and 'Confirm PSI Store Passphrase' with a text box. At the bottom, there is a red error message: 'Please select the PSI Store File you wish to import'. There are 'Cancel' and 'OK' buttons at the bottom right.

Follow the red prompts at the bottom of the window to complete the form. Once all of the fields have been filled in correctly, the **OK** button will be enabled. Click on the **OK** button to complete the import process.

Registering iKeys

In the PSI Store window, double-click on the PSI store you have just created. Using each of your iKeys in turn, ensure that the iKey is plugged in to your computer and click on the **Register Token** button. You will be prompted for your Individual Certificate passphrase which was supplied with each iKey.

The 'Token Passphrase' dialog box is a small window with a yellow speech bubble icon. It contains the text 'Please enter the Passphrase for the Token' and a single-line text input field. At the bottom, there are 'Cancel' and 'OK' buttons.

Enter the passphrase and click on the **OK** button. Remember that the password is case-sensitive.

Once all iKeys have been registered, click on the **Save** button, then close the PSI Store list window.

5.13 Using Medicare Online

The following sections describe how to use Medicare Online for:

1. Bulk Bill and DVA claims
2. Patient Claims
3. Online Patient Verification

Note: In order to use Online Claiming you will need to install Medicare Online version 6.11.4 and Java Runtime 5.0 or later.

5.13.1 Bulk Bill and DVA Claims

The invoicing process for Bulk Bill and DVA patients when using HIC online is much the same as when not using HIC Online. The only difference is the visibility of several extra tickboxes and radio buttons on the **Add Item to Invoice** window.

HIC Online Over-rides

- ☐ Not Normal Aftercare
- ☐ Hospital Service Not Performed in Hospital
- ☐ Self Deemed
- ☐ Not Duplicate Service
- ☐ Not Multiple Procedure

The tickboxes allow standard override flags to be sent as part of the claim. Only the tickboxes applicable to the current billing scenario will be visible. For example, if the item number used is for a diagnostic imaging service, the *Self Deemed* tickbox will be visible, otherwise it will not.

If the provider is marked as a specialist in their User Preferences and the patient does not have a valid referral, extra radio buttons will be displayed. These radio buttons are used to provide a reason for treating the patient without a valid referral.

Reason for No Referral

- ☐ Lost
- ☐ In Hospital
- ☐ Emergency
- ☐ Not Required

If you would like to add any additional information (sometimes referred to as service text) in order to get the claim successfully processed, you can enter this in the Notes field in the bottom half of this window.

Note [Text Area]

Time Spent 0 minutes

Note: If there is any text sent through, the claim will not be automatically processed. It will be referred to an operator for manual intervention.

After the invoice has been created, the settings made to these override flags can be altered in the Edit Sale window. This window is accessible by double-clicking on a displayed Sale (service) in either the account history, receipt window, or from within the claim. For more information on editing existing invoice items, see [Modifying an Item](#).

5.13.1.1 Creating a New Transmission

Go into **File > Maintenance & Reports**, select the **Daily** tab, and click on the **Bulk Bill/DVA Transmission** button.



This will open the Medicare Claims Control window:

Date Sent	Claim Id	Provider	Payee	Date Paid	Run No.	Claimed	Paid	Exceptions	Finalised
27/08/2008	G1204@	240278 1H	2402771J	00/00/00	0	\$0.00	\$0.00	2	☐
27/08/2008	G1211@	240278 1H	240278 1H	00/00/00	0	\$0.00	\$0.00	N/A	☐
28/08/2008	G1219@	240278 1H	240278 1H	00/00/00	0	\$410.00	\$0.00	2	☐
28/08/2008	G1220@	240278 1H	240278 1H	00/00/00	0	\$324.60	\$0.00	2	☐
04/06/2012	G1241@	059269DJ	059269DJ	00/00/00	0	\$159.80	\$0.00	N/A	☐

The Claims Control Window allows you to perform all functions related to electronic claiming of Medicare and DVA payments, including:

- Creating a new transmission
- Viewing the status of each claim
- Retrieving Payment and Exception reports for a claim
- Dealing with any exceptions
- Receipting claim payments

- Printing claims

To create a new HIC Online transmission, click on the **New Transmission** button at the top left-hand corner of the Medicare Claims Control Window.

New HIC Online Transmission

New Transmission: 25/02/2009 Provider: Dr A Demo Provider No: 1234567X

Sales to be transmitted: 3 Value: \$79.60

☒ Medicare ☒ Outpatients
☐ DVA ☐ Inpatients

Create Transmission

Remove Highlighted Keep Highlighted

Patient	Provider	Inv. No	Date	Form ...	Item No.	Total Fee	Balance	Batch No.
Edwards, Olivia	Dr A Demo	115308	19/09/2003	771495	55029	\$29.50	\$29.50	
Gilleatt, Amy	Dr A Demo	115341	28/09/2003	771498	23	\$25.05	\$25.05	
Gilleatt, Amy	Dr A Demo	115342	28/09/2003	771499	23	\$25.05	\$25.05	

Message

Print List Without Saving

HIC Online Version: 6.10.28

Cancel Transmit

If the chosen provider uses an iKey to sign claims, the correct iKey must be used. If the wrong iKey is used, the transmission creation will fail.

Separate claims must be created for each provider. The provider is chosen using the *Provider* drop-down list at the top of the window. If a provider has more than one provider number, a separate claim must be created for each provider number. The provider number is chosen using the *Provider No* drop-down list at the top of the window. If there are no items to be transmitted for a particular provider number, that number will not be displayed in the list. If only one provider number is available, the drop-down list will be greyed out and unable to be changed. The *Site of Service* corresponding to the selected provider number will be listed in blue text under the *Provider No* drop-down list.

Medicare or DVA services are specified using the *Medicare/DVA* radio buttons.

Claims are also required to be separated by *Inpatient* and *Outpatient* services and *Pathology* (only basic pathology is allowed), *Diagnostic* or *Other* services. Services for *Inpatients* or *Outpatients* are specified using the relevant radio buttons. Pathology/Diagnostic/Other items are specified using the appropriate radio button; these radio buttons will only appear if these types of items have been billed.

Note: If the items you expected to see in this list are not visible, then you have either incorrectly selected the radio buttons listed above, or they have already been batched; all applicable, non-batched items will be shown.

To remove a sale from the displayed list, highlight and click either the **Remove Highlighted** or **Keep Highlighted** button as appropriate. The removed sale(s) will then be included in the next new claim.

When satisfied with the list of sales to be included in the claim, click on the **Create Transmission** button.

After a short delay (approx. 5 -10 seconds) the message to be transmitted will be displayed in the *Message* window.

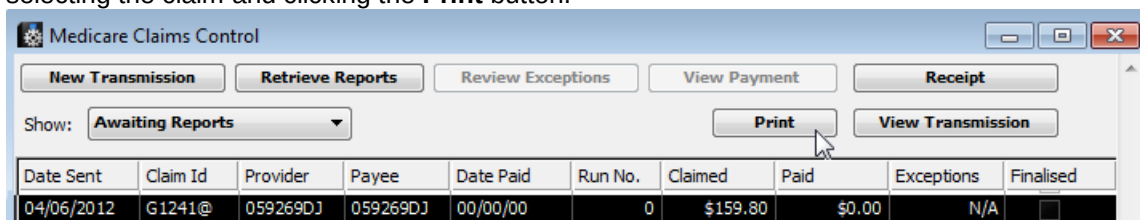


The **Transmit** button will now be enabled at the bottom of the window. Clicking this button will send this message to the HIC for processing and return you to the Medicare Claims Control window.

Note: Once a claim has been sent, you cannot edit or delete the service details in the claim as these changes will not be reflected at Medicare Australia.

Printing Claims

Details of the services contained within a claim can be printed from the Medicare Claims Controls window by selecting the claim and clicking the **Print** button.



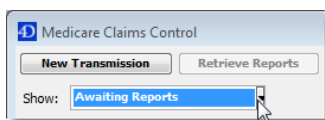
5.13.1.2 Retrieving Reports for the Claim

Once a claim has been transmitted, its status can be tracked in the Medicare Claims Control window; this is accessed in **File > Maintenance & Reports, Daily tab, Bulk Bill/DVA Transmission**.

A claim can be in one of four states:

1. **Awaiting Reports:** the claim has been submitted to Medicare, however, the payment and exception reports have not been received.
2. **Exceptions to Review:** one or more exceptions have been identified by Medicare; these must be dealt with before further processing of the claim is allowed.
3. **Ready to Receipt:** the payment report has been received and there are no outstanding exceptions for the claim. The payment can now be receipted and the claim can be finalised.
4. **Finalised:** the claim has been fully receipted.

Claims in each stage can be displayed by selecting the relevant stage from the *Show* drop-down list. This allows you separate claims by their stages, thus making it more simple to retrieve reports, deal with exceptions, and receipt when necessary.



After being processed, two reports are produced for each claim:

- A Payment report
- An Exception report.

The payment report provides such information as the *Date Paid*, the *Run Number* and the *Amount Paid*.

The exception report provides details about any exceptions found in the claim. Examples of exceptions might be:

- The patient's Medicare card issue number is out of date
- The amount claimed for the service is incorrect

- An additional service on the same day was not marked as a non-duplicate service, etc.

All exceptions for a claim should be dealt with (as described in the next section [Reviewing Exceptions for a Claim](#)) before attempting to receipt the claim.

Select *Awaiting Reports* from the *Show* drop-down list to list all claims that do not yet have a payment and/or exception report. Select the claim(s) you would like to retrieve payment and/or exception reports for by highlighting them in the list (additional claims can be selected by **Shift+clicking** or **Ctrl+clicking** on them). Click on the **Retrieve Reports** button.

Once the reports have been retrieved, the claim will be moved to either the *Exceptions to Review* list or, if the claim did not have any exceptions, the *Ready to Receipt* list. If you are having trouble trying to retrieve reports for multiple claims at once, try only highlighting a maximum of five claims.

The Payment Report will fill in the *Date Paid*, *Run No*, and *Paid* columns on the Medicare Claims Control Window. The Exception Report will fill in the *Exceptions* column on the Medicare Claims Control window, i.e. change it from 'N/A' to a number.

Note: When retrieving reports, it is common for several claims to be paid with the one Payment Report. Therefore, claims that you have not selected may have their Payment Reports returned when retrieving reports for a different claim.

The same is not true for Exception Reports, i.e. only the Exception Reports for those claims you have selected when you click on the Retrieve Reports button will be returned. The result of this phenomenon is that you will likely end up with claims which have Payment Reports but do not have Exception Reports. These claims will remain in the Awaiting Reports list until their Exception Reports are retrieved.

5.13.1.3 Reviewing Exceptions for a claim

A claim will only move into the *Ready to Receipt* area when all exceptions have been dealt with and deleted.

The number of exceptions for a claim is listed in the *Exceptions* column of the Medicare Claims Control window. If the number is 0, the claim has no exceptions. If the number is replaced with N/A, either the Exception Report has not yet been retrieved from the HIC, or it has been deleted for some reason. In either case, the Exception Report should be retrieved by clicking **Retrieve Reports** before proceeding.

Select *Exceptions to Review* from the *Show* drop-down list on the Medicare Claims Control window to list all claims with exceptions. Highlight a claim in the list to view its exceptions; these exceptions must be dealt with one at a time.

Click on the **Review Exceptions** button. If this button is greyed out, it means that either the claim did not have any exceptions (the *Exceptions* column will contain 0), the exception report has been deleted (the *Exceptions* column will contain N/A), or that the Exception Report has not yet been retrieved (the *Exceptions* column will contain N/A).

Claim Exceptions

Servicing Provider: 4444444J Payee Provider: 2402781H

Batch No	Date	Item No	Name	Claimed	Paid
G1147@	21/08/2003	23/01	ITEM, ALICE	\$0.00	\$25.00
G1147@	21/08/2003	23/01	ITEM, IAN	\$0.00	\$25.00

Remove Item from Batch Edit Item Edit Patient Details Delete Exception

Current Medicare Number is **2428 78427 6** 2 Account Reference:

Card Problem: **I-MEDICARE ISSUE NUMBER**

Payment Problem: **241-TOTAL CHARGE AND BENEFIT FOR MULTIPLE PROCEDURE**

This item has been paid, but the payment is different to what you charged.
Click on the EDIT ITEM button, and change the fee to the amount paid.
Then click the DELETE EXCEPTION button.

After dealing with each exception, you should remove it by first selecting it, and then clicking on the 'Delete Exception' button above.
You can delete this entire record, with all exceptions by clicking on the 'Delete Statement' button below, however you should not normally do this unless you intend to re-retrieve the Exception Report.

Delete Statement Print Close

The Claim Exceptions window lists each of the claim's exceptions. Highlighting each exception will display more detail about that exception, such as the Medicare Issue Number being incorrect, as shown in the picture above. It will also display the Medicare or DVA card number currently held by Medicare for the selected patient.

To assist in dealing with the exceptions, a report of all exceptions in the claim can be produced by clicking the **Print** button.

The first step in determining what to do is determining whether the claim has been paid. The amount paid is listed in the *Paid* column as above.

If the claim has been paid:

Sometimes you will receive an exception for an item that has been fully paid. This is usually due to a minor issue like an incorrect claim amount or an incorrect Medicare number. It is important that you still rectify this issue; ignoring it could mean the patient's next claim will be rejected.

If there is a problem with the item, click on the **Edit Item** button to open it in the Sales window. In here, you can press the **Edit** button and rectify the issue.

If there is a problem with the patient's details, click on the **Edit Patient** button to open the Patient Demographics window. In here, you can alter the incorrect details to match Medicare's records.

Note: If you have checked the Medicare number in the Patient Demographics window and it is still listed as incorrect, you may need to check the Medicare number in the account holder record. This can be accessed by going into Open > Account Holders and searching for the patient (or their relevant account holder).

Once you have fixed the problem, click on the **Delete Exception** button.

If the claim has not been paid:

The reason is usually more serious (e.g. it has already been paid), or it is a duplicate item on the same day and does not have the appropriate service text. Whatever the reason, you must determine whether or not you plan to resubmit the item.

If you plan to resubmit the item:

You must first fix the problem by clicking on either the **Edit Patient** or **Edit Item** buttons, and changing whatever is wrong. Then click on the **Remove Item From Batch** button. This removes the item from the current batch so that it will be automatically included in the next transmitted batch.

Click on the **Delete Exception** button.

If you do not plan to resubmit the item:

In this case, there's no point in editing anything; you can simply click on the **Remove Item From Batch** button, and then click on the **Delete Exception** button.

You can then go into the patient's Account History and delete the relevant item's invoice; it is important that you do delete this from the Account History, if you do not, it will be included in the next transmitted batch.

In all cases, once you have taken the appropriate action, you should click on the **Delete Exception** button at the bottom of the window to indicate that the exception has been dealt with. You should not use the **Delete Statement** button except in extreme circumstances, as this deletes all the displayed exceptions and so would require the exception report to be retrieved again from the HIC. The statement is deleted automatically once the last exception has been deleted.

Once you have dealt with all the exceptions and the list is empty, click on the **Close** button at the bottom of the window to return to the Medicare Claims Control window.

If you accidentally delete all exceptions, or delete the statement, you can re-retrieve the exception report by pressing **Retrieve Reports** again; this will generate a prompt asking if you are sure you would like to proceed, you can confirm this and the claim will move back into *Exceptions to Review*.

5.13.1.4 Receipting Claim Payments

Once payment and exception reports have been received for a claim and all exceptions have been dealt with, the payment for the claim is ready to be receipted and the claim will move to the *Ready to Receipt* list.

Select *Ready to Receipt* from the *Show* drop-down list in the Medicare Claims Control window to list all claims that have payment reports and no outstanding exceptions. Select the individual claim to receipt by clicking once on it in the list.

Note: The amounts listed in the Claimed and Paid columns for each claim in the Ready To Receipt section MUST be equal. If they are not, you have not dealt with your exceptions correctly. Click Retrieve Reports again and work through your exceptions again.

Click on the **Receipt** button. If this button is greyed out, it means that the claim has outstanding exceptions (check the Exceptions column in the list to make sure it is 0).

This will bring up the receipting window; make sure that the amount you are receipting matches the amount that was actually paid by Medicare.

Once a claim has been fully receipted, it is automatically finalised. Finalised claims can be viewed by selecting *Finalised* from the *Show* drop-down list.

If HIC has paid a batch (in full or part) manually, ie. sent you a paper statement of payment rather than an online report, these can still be receipted by clicking the **Receipt** button. You will get an alert stating that there has not yet been a payment report received, or that the claimed amount does not match the paid amount as there may still be outstanding exceptions; you can select **OK** when asked if you would still like to receipt, and proceed to the receipt window where you can receipt the claim as appropriate.

5.13.2 Patient Claims

The Patient Claims function submits a patient's claim directly to Medicare on behalf of the patient. It operates in two modes:

1. Store and Forward
2. Real-Time

In *Batched* (Store-and-forward) mode, the claims are batched and transmitted to the HIC at a later time when convenient; this is similar to the way in which Bulk Bill and DVA claiming works. At the time the invoice or receipt is generated, the patient claim content is created and stored in the Genie database. At a later time, all of the claims created can be batched up and transmitted to the HIC. In this mode, the Internet connection only needs to be available when the claims are transmitted.

In *Real-Time* mode, the patient claim is created and transmitted to the HIC at the time the invoice or receipt is generated. In this mode, the Internet connection must be available when the invoice or receipt is created. This removes the need for batching claims at the end of the day, however, it will slow down the invoicing and

receipting process slightly while the transmissions are performed.

Enabling Patient Claims

Before you can use patient claims, you must enable it in your Practice Preferences. Go to **File > Practice Preferences** and double-click your clinic name in the list to open it. Go to the **Miscellaneous** tab and ensure that *Use Patient Claims* is ticked in the *HIC Online* area. If you will be performing Real-Time Patient Claims, tick the *Run Real-Time by Default* tickbox.

5.13.2.1 Invoicing

When Patient Claiming is enabled and the invoice is being created for the patient's account holder (Self), a *Patient Claims* area is displayed on the invoice window.

The *Use Patient Claims* tickbox indicates whether a patient claim should be created for the current invoice.

The *Patient Claims* drop-down menu allows default values to be set for the current account holder:

- *Ask Me* - the *Use Patient Claims* tickbox is available but defaults to being unticked.
- *Always* - the *Use Patient Claims* tickbox is available and defaults to being ticked.
- *Never* - the *Use Patient Claims* tickbox is unticked and unable to be ticked.

The same override flags used with Bulk Bill and DVA invoicing are available when adding an item to an invoice using Patient Claims.

5.13.2.2 No Payment/Gap Paid By Patient

If no payment amount is entered for the invoice, when the **Print** button is clicked, the Create Patient Claim window is displayed.

This window provides the following options:

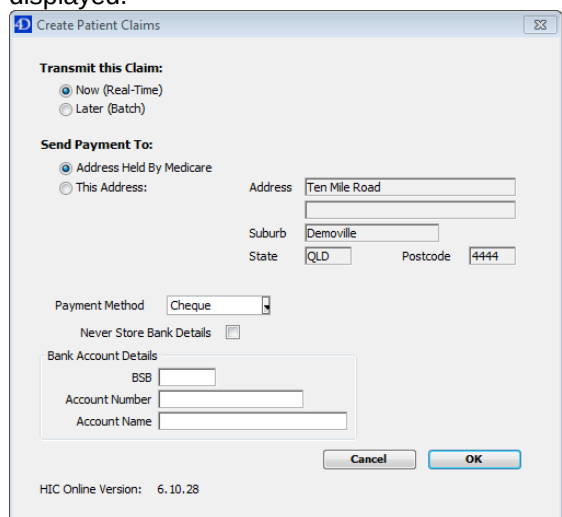
- *Transmit this Claim:* to choose whether the claim is to be sent in *Real-Time* mode or *Batched* mode. If the *Use Real-Time by Default* tickbox is ticked in Practice Preferences, the *Now* radio button will be selected,

otherwise the *Later* radio button will be selected.

- **Send Payment To:** to choose whether the cheque will be sent to the patient's address held by Medicare, or to another specified address. This cannot be a PO Box or the practice's address.

5.13.2.3 Patient Paid Full Amount

If a payment amount is entered for the invoice, when the **Receipt** button is clicked the Receipt window is brought up as usual, however the Patient Claims area is displayed with the same values as entered on the invoice. These can be changed here if required. When the **Print** button is clicked, the Create Patient Claim window is displayed.



In addition to the options provided by the unpaid Patient Claim window, this window provides the following options:

- **Payment Method:** to indicate whether the patient's benefit should be paid by Cheque or EFT. This value is saved in the account holder's record, therefore the default value for the current account holder will automatically be selected.
- **Never Store Bank Details:** if the benefit is to be paid by EFT, this tickbox indicates that the account holder's bank account details should never be stored in the Genie database. If they are stored, they will automatically be filled in for each Patient Claim for this account holder. If this tickbox is ticked, the user is never prompted to save the bank account details when they have been entered.
- **Bank Account Details:** if the benefit is to be paid by EFT, the account holder's bank account details must be supplied. If the details have previously been saved with the account holder, they will automatically be filled in.

Note: If the patient has registered their bank details with Medicare then selecting 'Cheque' will mean the money will be deposited to their account and no bank details need to be entered into Genie.

Clicking the **OK** button results in a dialogue stating 'Building Patient Claim...' Once this disappears, the patient claim has been created.

For batched claims, a lodgement advice will be printed and the invoice/receipting process is now completed. Refer to [Transmitting Batched Claims](#) for information on how to batch and submit these claims to the HIC for processing.

For real-time claims, once the claim has been created, it is automatically submitted to the HIC. While this process is occurring a dialogue will appear stating 'Submitting Claim...' Once this disappears, the patient claim has been created.

If the claim is successful, either a Statement of Claim and Benefit Payment or a Lodgement Advice is printed out, depending on whether or not the invoice has been paid.

If the claim is unsuccessful, the Patient Claim Errors window will be displayed.

Service Date	Item	Patient	Claimant	Claimed	Error	Acceptable?
05/09/2012	105	State, Samantha	Miss Samantha State	\$67.20	9601	Y

Claim Error 9601: The claim needs to be referred to a Medicare Customer Services Officer for further assessment. The claim will be processed and payment notification will be sent in the near future.

Current Patient Medicare Card Number: 247 20589 3 Update Patient

Edit Item Edit Patient Edit Claimant Edit Provider

Cancel Resubmit Accept

This window lists all of the services which have generated errors. Clicking on a service will display the corresponding error message in red. In the example displayed, the service has failed because the servicing provider has not been registered for HIC Online.

Depending on the nature of the error, it may be appropriate to edit the *Item*, *Patient*, *Claimant*, or *Provider* details. Buttons are provided on this window to take you directly to the entity in question. If it is simply a matter of the patient or claimant's Medicare Number or Individual Reference Number being incorrect, these can be easily updated to the values held by the HIC by clicking on the **Update Patient** and **Update Claimant** buttons.

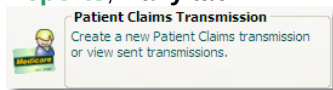
Some errors may not be serious enough to cause the claim to be rejected. These errors have a Y in the *Acceptable* column. If all of the errors are acceptable, the **Accept** button will be enabled. Clicking the **Accept** button will send the claim to the HIC for manual processing.

If all of the errors which have an N in the Acceptable column have been dealt with by editing the *Item*, *Patient*, *Claimant* or *Provider* details, the entire claim can be resubmitted by clicking the **Resubmit** button.

Clicking the **Cancel** button will return you to the Create Patient Claim window. If the problems cannot be rectified from here, click on the **Cancel** button to skip the patient claims process and print out a normal invoice or receipt.

5.13.2.4 Transmitting Batched Claims

Patient Claims created using the batched (Store-and-forward) method must be batched and transmitted to the HIC. This functionality is accessed with the **Patient Claims Transmission** button in the **File > Maintenance & Reports, Daily** tab.



Clicking this button takes you to the Patient Claims Control window. To create a new transmission, click on the **New Transmission** button. This will open the New Patient Claim Transmission window.

Hold	Date	Time	Patient	Claimed	Pay By	Provider	Payee
☐	06/02/2012	1:49 PM	Miss Samantha G State	\$67.20	Cheque	2127451F	2127451F
☐	06/02/2012	1:51 PM	Miss Samantha G State	\$67.20	Cheque	2127451F	2127451F
☐	05/09/2012	1:54 PM	Miss Samantha G State	\$67.20	Cheque	2127451F	2127451F

This window lists all batched patient claims which have not yet been batched and submitted to Medicare. If necessary, you can remove claims from the current transmission by clicking the *Hold* tickbox beside the claim.

When you are happy with the claims to be transmitted, click on the **Create Transmission** button. This will batch up to 30 of the displayed claims into a single transmission. When the transmission has been created, the **Transmit** button will be enabled at the bottom of the window and the message 'Transmission created successfully' will appear above it in blue.

Hold	Date	Time	Patient	Claimed	Pay By	Provider	Payee
☐	06/02/2012	1:49 PM	Miss Samantha G State	\$67.20	Cheque	2127451F	2127451F
☐	06/02/2012	1:51 PM	Miss Samantha G State	\$67.20	Cheque	2127451F	2127451F
☐	05/09/2012	1:54 PM	Miss Samantha G State	\$67.20	Cheque	2127451F	2127451F

Clicking the **Transmit** button will send the claim to Medicare for processing, and will return you to the Patient Claims Control window.

If for any reason a batched transmission needs to be deleted, select the transmission from the list on the left, and click on the **Delete Transmission** button. This will remove both the transmission and the claims within the transmission.

5.13.2.5 "Post-Invoice" Claiming and Deleting

A Patient Claim can be created after a normal invoice or receipt has already been generated. This is achieved in the Account History window. There are two buttons in this window: **Create Patient Claim** and **Delete Patient Claim**.

Date	Provider	Patient	Item	Fee	Payment	Discount	Credit	Balance
4/09/2012	Dr Andrew Largen	STATE, Samantha	105	\$45.50	\$0.00	\$0.00	\$0.00	\$45.50

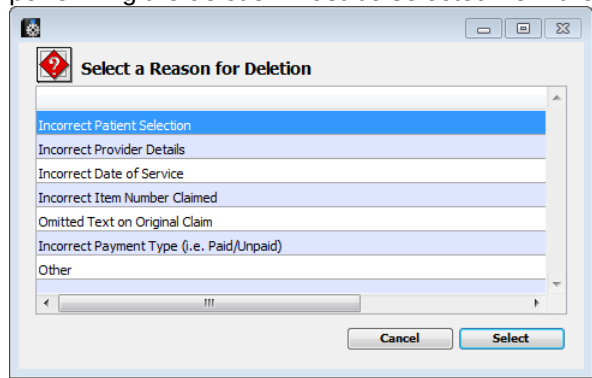
To create a new patient claim, select the item(s) that you would like to include in the claim, and click on the **Create Patient Claim** button. This will open the Create Patient Claim window and allow you proceed as you would during the invoice or receipting process.

Same Day Deleting

If you would like to retract a real-time patient claim after it has been submitted to Medicare, select the item(s)

and click on the **Delete Patient Claim** button.

You will be prompted to confirm the deletion of the claim(s). If the delete request is confirmed, a reason for performing the deletion must be selected from the supplied list.



The claim will then be deleted, or an error indicating why the claim could not be deleted will be returned.

Note: This function can only be used on claims on the same day they were created.

5.13.3 Online Patient Verification

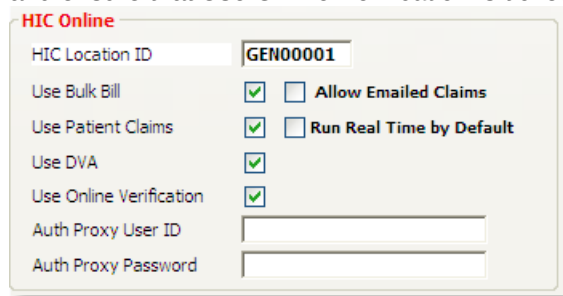
Online Patient Verification provides the facility to verify the patient's eligibility for claiming Medicare benefits prior to claim submission. You can also verify that the patient is known to the health fund and holds hospital cover.

Online Patient Verification can be performed for Medicare, the patient's health fund, or both.

If the patient's identity is able to be established from the details transmitted, any discrepancies in the patient's first name, Medicare card number, or Individual Reference number are highlighted, with the ability to update the details in Genie, if necessary.

Enabling

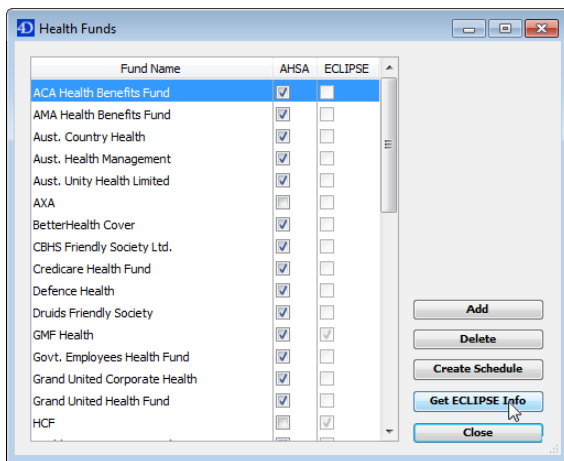
Before you can use Online Patient Verification you must enable it in your Practice Preferences. Choose **File > Practice Preferences** and double-click on your clinic name in the list to open it. Go to the **Miscellaneous** tab and ensure that *Use Online Verification* is ticked in the *HIC Online* area.



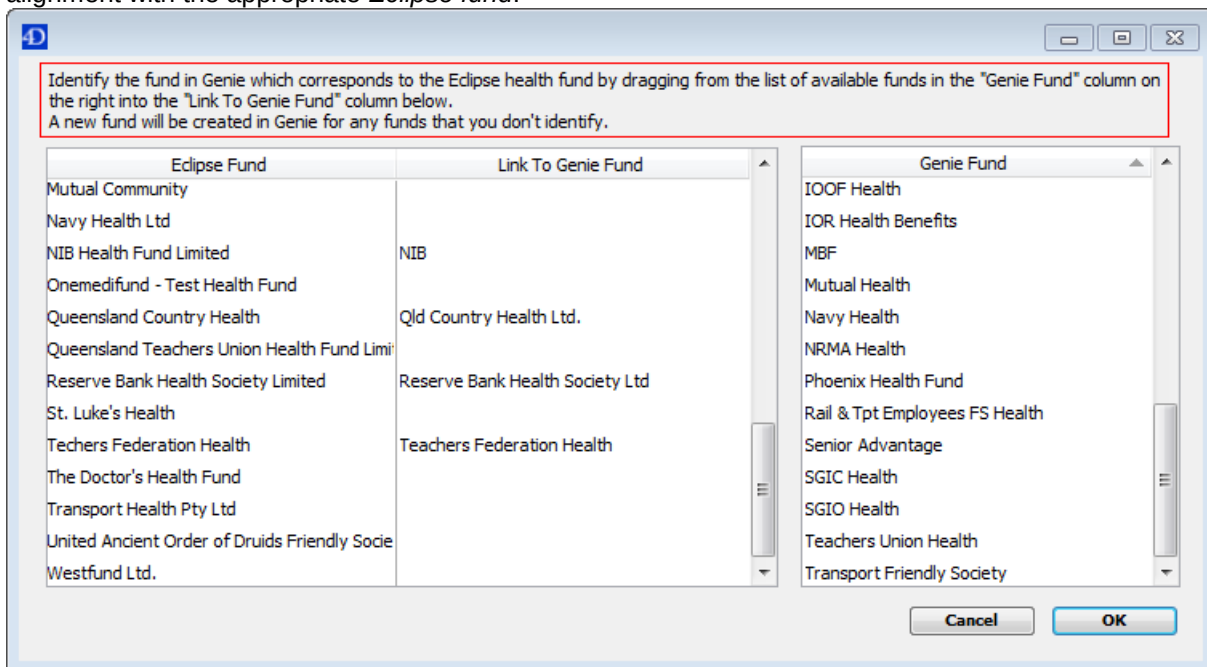
An Internet connection must be established in order to perform Online Patient Verification.

In order to do health fund verifications, your health funds must be linked through to Online Services at Medicare. This is done through **Open > Billing Items, Health Funds** button.

From here, click on the **Get ECLIPSE Info** button. You do not need to be registered for ECLIPSE to do this, but you do need to be registered for HIC Online. This will retrieve the information of the funds participating in ECLIPSE/Online Verification and match them to the funds you have in Genie.



Funds that don't have an exact name match will appear in a list for you to match appropriately. This is done by dragging the fund from the *Genie Fund* list on the right and dropping it into the *Link to Genie Fund* column in alignment with the appropriate *Eclipse fund*.



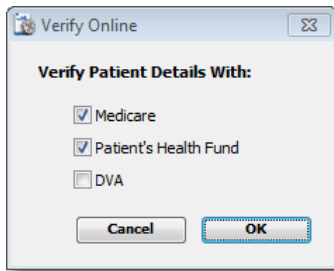
Note: You can only link one Genie fund to one ECLIPSE fund, so if you have multiple entries for a fund, these will need to be consolidated into the one fund name.

5.13.3.1 Using Online Verification

To check a patient's eligibility for Medicare or their health fund, open the patient's Patient Demographics Window and click on the **Verify Online** button at the bottom of the window.



The following window will appear, prompting you to choose the details to be checked.

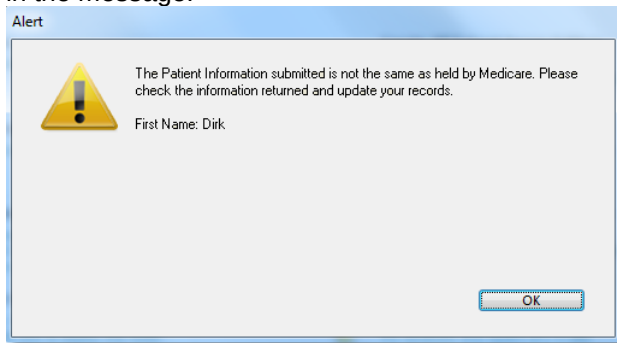


Click **OK**, and you will be presented with a dialogue stating 'Checking Patient Eligibility...' Once this disappears, the verification is complete.

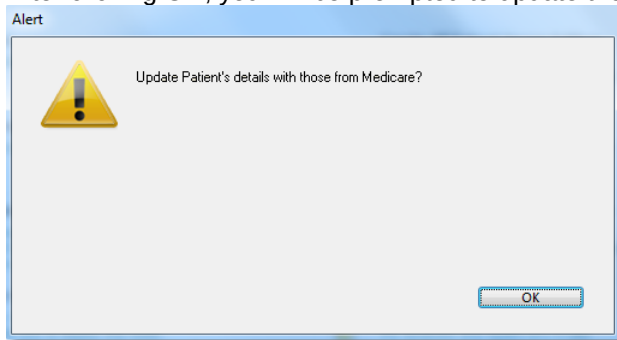
Medicare Verification

The request will return with one of the following responses:

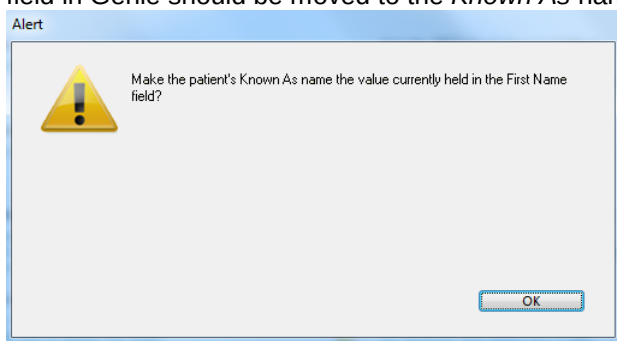
1. The patient is eligible for Medicare.
2. A message indicating that one or more of the patient's Medicare number, Individual Reference number, or First Name do not match the values held by Medicare. In this case the value(s) held by Medicare are displayed in the message.



After clicking **OK**, you will be prompted to update the values held by Genie with those returned from Medicare.



If the patient's first name is being updated, a prompt as to whether the value currently held in the *First Name* field in Genie should be moved to the *Known As* name in Genie.



3. A message indicating that the patient could not be identified on the Medicare system from the details provided in Genie.

4. Some other error message. In this case the action taken will depend on the error message returned. Contact the Genie support desk if you are unsure of how to proceed with this message.

Health Fund Verification

Where you have requested both a Medicare and health fund check, the Medicare check must be successful in order to progress to the health fund check. If you do not have the patient's Medicare details, you can still perform a health fund verification on its own by unticking the *Medicare* option.

Health fund checks will return a prompt saying either:

1. The patient is a member of the fund in question
2. The patient is a member but does not have hospital cover
3. That you must check fund membership details; meaning there is not adequate information to verify the patient and you may need to contact the fund.

If the patient has registered their name differently with their fund to Medicare, you can put the health fund name into the *Alias* fields in the **Secondary** tab of the Patient Demographics window. The health fund check will use these fields to do the verification instead.

DVA Verification

The DVA verification performs essentially the same checks as the Medicare check, but instead of checking the patient's Medicare number, it checks their DVA number.

Please note: While the demographic allows for the Gender field to contain M, F, I, or N (or to be left blank), DVA restrictions require either M or F to be entered. You will receive an alert if you attempt to perform a DVA verification for a patient with anything other than M or F in their Gender field.

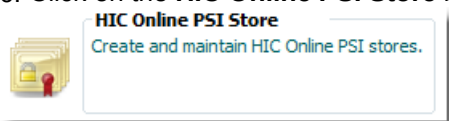
5.13.4 Updating Certificates

HIC Certificates

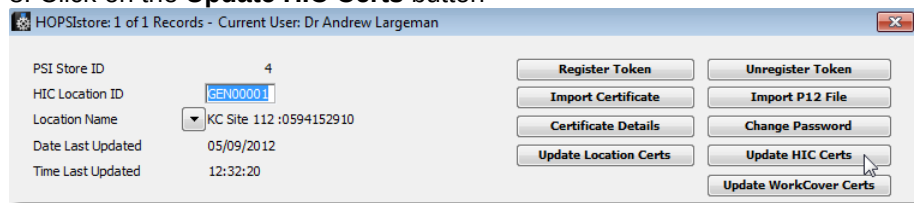
HIC Certificates supplied by Medicare expire every five years. Genie will warn you about one month prior, that your certificates are about to expire. To update your certificates, download and install new certificates as described in the following procedure.

Note: For the following procedure to work, an active Internet connection is required.

1. Log out of Genie (**this is important**)
2. Log in to Genie
3. If you get a step about expiring certificates ignore this
4. Go to **File > Maintenance & Reports**
5. Click on the **Administrator** tab
6. Click on the **HIC Online PSI Store** button



7. Double-click on the name of your PSI store in the list (this will be your GEN number).
8. Click on the **Update HIC Certs** button



If you are running a network, you only need to perform this on one of the client computers. The server and all the other clients will automatically update next time they use HIC Online.

Location Certificates (Genie Version >8.5.2)

If you are using Genie version 8.5.2 or higher, your location certificates will update automatically; you should not need to follow the process below. However, if you are receiving a message stating that your certificates are expiring, you can follow the steps below to manually update your certificates.

Location Certificates (Genie Version <8.5.1)

Location Certificates expire every five years and can be sourced from the Medicare website. Before updating your Location Certificates, please ensure you are using Genie version 8.3.5 or higher. For information on updating Genie please refer to the [Updates](#) section of this manual.

The following procedure only needs to be performed on one transmitting client machine. The other transmitting clients on your network will update the next time they log in.

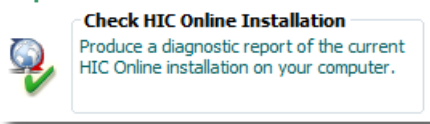
1. Go to www.certificates-australia.com.au
2. Click on **Healthcare Directory** on the left hand side.
3. In the search box that comes up, type the RA number into the Surname/RA number field. If you are unsure of your RA number, you will need to contact Medicare for these details.
4. You will be presented with a 'Matching Certificates' page with two download buttons. You will need to press each of these download buttons and save these files to your desktop.
5. In Genie, go into **File > Maintenance and Reports** and click on the **Administrator** tab.
6. Click on **HIC Online PSI Store** and double-click on your GEN number.
7. Click on the **Update Location Certificates** button.
8. Browse to each file on the desktop.

Perform an online verification of a patient's Medicare card to confirm HIC online has updated successfully. If this has been successful, you will need to contact Genie support to have a support representative review your HIC online log files; these log files will confirm that your new certificates have been imported correctly, and that it is safe to delete your old certificates.

5.14 Troubleshooting Online Claiming

Diagnostic Self-Test

If you are experiencing problems trying to use HIC Online, the first thing to do is run the Diagnostic Self-test by clicking the **Check HIC Online Installation** button under the **Administrator** tab in **File > Maintenance & Reports**.



This will produce a text file which will identify any problems with your HIC Online installation and the suggested course of action to remedy any such problems.

5.15 Referral/Reply Letters (Patient Correspondence)

This chapter deals with letters written regarding a patient to a provider in the Address Book, typically a referral to a specialist or a GP's letter back to a referring doctor.

Referral/reply letters can be created by clicking on the **Red quill** icon  from either the Appointment Book, a patient's Clinical Window, or the Patients List. Alternatively, you can use options in the Patients menu, which takes advantage of the *Letters Dictated* tickbox in the Add Consult window. See the [Patients Menu](#).

If the selected patient does not have a valid referral or a usual GP in their demographics window, clicking on the **Red quill** icon will bring up the Search window, allowing you to search the Address Book for the recipient.

Enter the first few letters of whichever field is appropriate, then click **OK**. As this is only a search, you will not need to fill in every field.

If you require a blank letter, just click **OK** without entering any search criteria.

Note: If you have already assigned a referring doctor to the patient, in the Patient Demographics (see [Edit Patient](#)) then this window does not appear, and the letter is automatically addressed to the referring doctor. You can then readdress this to another provider, if desired (see notes on the [Readdress Button](#).)

If a matching record is found in the Address Book, a new letter will open using the Default Template. Place your cursor in the body of the template and type your letter. Print or Save the letter as appropriate.

Button Description

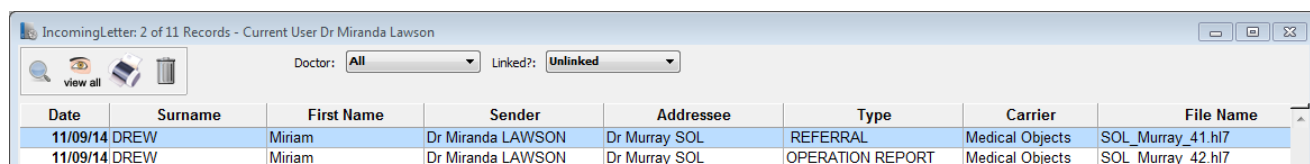
The *Default Letter* drop-down menu displays a list of letter templates available, and allows you to add new templates. If you have multiple specialists, each with their own Referral/Reply letter formatting preference, you can create several templates. This will mean you are able to select these from the Template drop-down menu before you begin typing. For more on adding new templates, please see, [Adding New Templates](#).

The *From* drop-down menu allows you to choose the doctor from whom the letter is being written.

The names in the menu are those users who have the *Show me in the Billing Menu* tickbox in User Preferences ticked. If a receptionist is typing the letter, then (s)he needs to select the doctor before the letter can be saved.

The *To* field will be the heading of the letter, naturally it defaults to the addressee but can be changed without affecting the letter itself. Please note that this will not readdress the letter, this is done using the readdress button (see below).

The *Type* drop-down menu allows you to assign the letter a type that will be seen by the receiving doctor when it is sent electronically. If you receive a letter electronically from a doctor that has specified the type, when you go to **Open > Incoming Letters** you will be able to see the letter type.



Date	Surname	First Name	Sender	Addressee	Type	Carrier	File Name
11/09/14	DREW	Miriam	Dr Miranda LAWSON	Dr Murray SOL	REFERRAL	Medical Objects	SOL_Murray_41.hl7
11/09/14	DREW	Miriam	Dr Miranda LAWSON	Dr Murray SOL	OPERATION REPORT	Medical Objects	SOL_Murray_42.hl7

The *Send Via 3rd Party* tickbox allows you to send the letter securely via a 3rd party encryption program such as Argus or Healthlink. For more information on this please see [Electronic Correspondence](#).

Prefers can be set in the addressee's Address Book entry. This is how the receiving doctor prefers to receive their letters.

Ready to Send is what will trigger a letter to be sent via the 3rd party selected. This allows for the letter to be reviewed etc before it is sent.

Sent from Genie and *Delivery Acknowledged* are in relation to 3rd party correspondence and whether the letter was sent/received respectively.

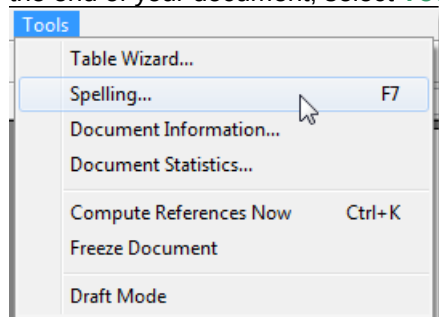
The *Reviewed* tickbox would normally only be used by specialists that have someone else type the letter, and later review it. The doctor would tick this box after reviewing the letter to let the receptionist know that it was ready to send.

The *Printed* tickbox is automatically checked when the letter is either printed, faxed or emailed.

The *Flag for Followup* tickbox is used for important referrals to ensure that the patient actually attends the specialist appointment. When a reply letter is received, you would then check the *Reply Received* tickbox. To see how these tickboxes are used in practice, see [Reviewing Correspondence](#).

Can't Delete will not allow the letter to be deleted at all from the database once saved. This is irreversible.

The *Spellchecking* tickbox provides an integrated spell checking facility into the letter writer. To check spelling at the end of your document, select **Tools > Spelling**.



Learned words are stored in a dictionary file located within your 4D folder. This file is updated each time you Quit out of Genie. If you would like to edit the dictionary, hold down the Alt key and click on the **Info** button  beside the *Spellchecking* tickbox. This will open the Edit Dictionary window, allowing you to add and remove words from the dictionary using the buttons on the right. Once you have done this, you will need to restart Genie on your computer in order for the changes to take effect.

The **CDA Dx** button allows you to see why this letter cannot be sent in CDA format, if applicable. For more information, please consult the Sending in CDA Format section of the web version of this manual. This can be accessed from within Genie by going into **Special > Genie Online Manual**.

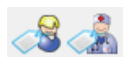
The **Edit Template** button will open the underlying template for this letter. This will allow you to make permanent changes to the letter, affecting all future letters, not just the one in view.

Convert to Text allows you to manually edit an inserted reference (such as a slightly misspelled address) as text, i.e. without it highlighting and deleting the whole reference.



The **Email** icon creates an email in Genie's built-in email client, and places it in the Outbox. If you have entered an email address in the addressee's record in the Address Book, the email will be sent the next time you send or receive email. When a letter is emailed, any images that have been inserted are automatically sent as attachments to the email. For more detail on using email in Genie, see [Email](#).

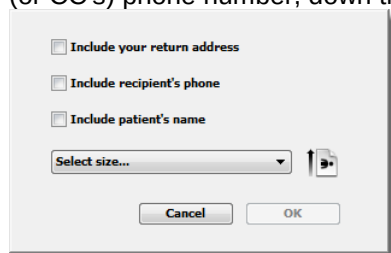
Note: If you would like your letters to keep their formatting when encrypted then select 'Send as RTF attachment' when prompted. This assumes the receiver can actually receive in RTF files.



The **Label** icons allow you to print sticky envelope labels for either the patient or the addressee. Genie's built-in labels support A4 with 14 labels per sheet (ie. Avery 7x2), or the Dymo Labelwriter series. For more information please see the [Labels](#) chapter.



The **Envelope** icon allows you to print an envelope for the Addressee and/or the CCs. When printing an envelope, you have the option to print the following: return address details, the patient's name, and addressee's (or CC's) phone number, down the left hand side of the envelope.



On Windows machines, you are able to choose the envelope size (as seen above). On Macintosh machines, this option does not appear as you can set your envelope size in Printing Preferences (**File > Printing Preferences**) **Page Setup** button.



The **Print** icon will print the letter, defaulting to the printer which you have selected in the 'Letters' option of **File > Printing Preferences**.



The **Full Page** icon makes the 4D Write word processor open to full page to type if you wish. This also allows you to fax the letter using whatever fax software you have installed on your computer.



The **Word** icon will open the letter in Microsoft Word (you must have Word already installed on your computer). This feature is for those people who prefer to use Word's Autotype and AutoCorrect functions. Once you have finished writing the letter in Word, Save and Close the Word document and return to Genie.

Note: If you would like to use this function it is recommended that you turn on the option to save letters reimported from Word as attachments in the Correspondence tab of your User Preferences (File > User Preferences).



You will notice that the **Word** icon is now coloured red. Clicking again on this button will import the Word document back into 4D Write with all formatting retained. If the import is successful, the Word document is automatically deleted from your hard disk. It is temporarily stored in a folder called "Letters" within the Genie folder.

Note: You must remember to close the Word document before attempting to import it back into Genie, otherwise it won't work! If you are receiving an error -49, this is most likely the cause.



The **Edit doctor** icon opens the addressee's record in the Address Book, allowing you to add or modify any of their details, such as their email address.

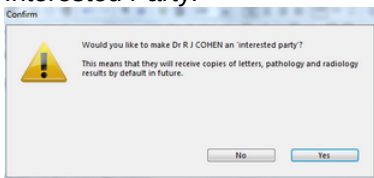


The **Re-Address** icon allows you to select a different addressee for the letter. This would most commonly be used where the letter has defaulted to the referring doctor, but you would like to send a letter to someone else about the patient.

Note: This button will only work when you initially open the letter. Once the letter has been saved, the references are "frozen". In this case you would need to copy the contents of your letter, recreate a new letter, change the doctor and paste in the copied contents.

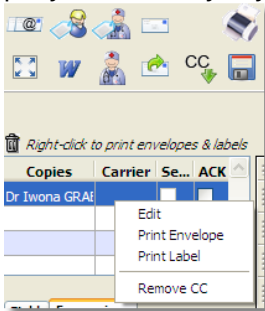


The **CC** icon places a CC with address information at the bottom of the letter. You can CC anyone in the Address Book, and can have as many CCs as you like. Holding down **Ctrl** will put the CC address in a window envelope format. Once a person has been a CC on a letter, you have the option of marking them as an Interested Party.



Interested parties can be accessed through the **CC** button or the **Interested Parties** icon  in the patient's Clinical or Patient Demographics window. You can edit the list of Interested Parties through this button, or by selecting *Edit Interested Parties* from the **CC** button.

The CC section appears once you add a CC, allowing you to send your CC letters to their recipient via a third party, if necessary. If you right-click on the CC, you can edit their details or print envelopes/labels for them.



The **Save** icon saves what you have already written without closing the window. This can be useful when writing a long letter in case you have a sudden crash.

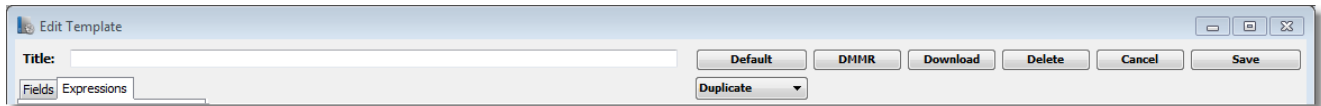
Macros

The Macros menu at the top of the window allows you to add and edit macros for use in letters and other areas of Genie. For more information about macros, see the [Macros](#) page.

5.15.1 Setting up the Default Template

Whenever you create a new letter by clicking on the **Red quill** icon , Genie uses the template called 'Default Letter'. For convenience, your default template should be for the type of letter you most commonly write. Generally, for GPs it would be a referral letter and for specialists, a letter back to the referring doctor.

To edit this template, click on the **Edit Template** button. This will open a window like this:



Note: You cannot change the name from 'Default Letter'. You can, however, delete this template, in which case Genie will immediately recreate a fresh template called 'Default Letter'. This can be useful if the template ever becomes corrupted.

In the middle of the window is a **Default** button. Clicking this will wipe the current template and enter a default template containing all the usual information you might need.

The **DMMR** button creates a Domiciliary Medication Management Referral template.

The **Download** button allows you to download some common referral templates from our Genie Web Server e.g. Vic Statewide Referral Form. For more information, see [Adding New Templates](#).

The *Duplicate* drop-down menu allows you to copy an existing template in Genie. This is useful for creating several templates with slight variations (e.g. referral letter with each doctor's own letterhead).

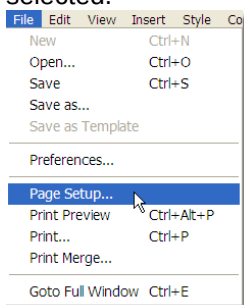
5.15.2 Setting up the 4D Write Area

It is a good idea to set the margins and page setup in your 'Default Letter' template as it is the basis for all new templates created.

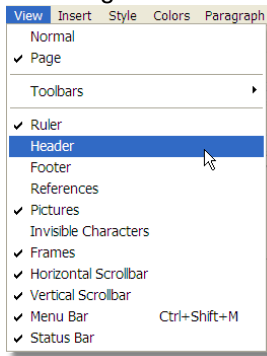
All the menus described below are within the 4D Write window, not the main Genie menus at the top of the screen. These are located above the 4D Write toolbar, as seen below:



First, select **File > Page Setup** and make sure the page size is set to A4, and the correct printer has been selected.



You can use the View menu to determine whether you would like to include headers and/or footers in your letter. Selecting *Header* or *Footer* from this menu will either tick, or untick this option.



Headers are a separate area at the top of a word processing document. These print on every page of a multi-page document, and are usually used for page numbering. Footers are a separate area at the bottom of the page, and also print on every page of a multi-page document.

Finally, you should set the printable margins.

The numbered scales along each side of the letter are called Rulers. If you place the cursor over the current margin setting, it will become a double-ended arrow as in the picture below.



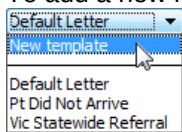
You can now click and drag the margin left or right to suit. This has the effect of adjusting the width of the body of the letter. You can do the same for the other three sides of the template to adjust the left, right and bottom margins.

If you are using a header, clicking within the header area allows you to do the same to adjust the size of the header.

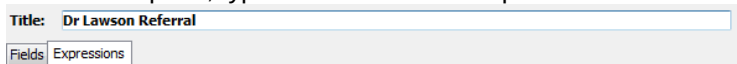
Click **Save** to save the template.

5.15.3 Adding New Templates

To add a new letter template, select *New Template* from the *Template* drop-down menu.

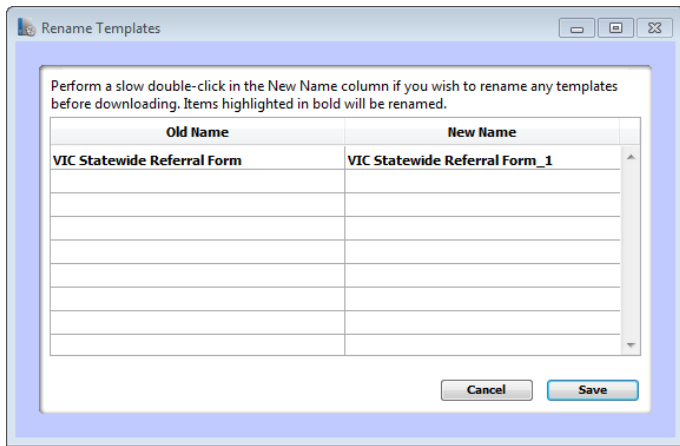


This copies the Default Letter template into a new window. This is why it is important to get the page setup and margins correct in the Default Letter template before adding new templates. Make the required changes to the content of the letter and use Fields and Expressions (please see [Fields & Expressions Tab](#)) so that patient specific information can be automatically imported into the letter when you select a patient. When you are happy with the template, type a name for the template in the *Title* field and then click **Save**.



You can copy the contents an existing template (other than the 'Default Letter' template) in Genie by clicking on the *Duplicate* drop-down menu and selecting the template you wish to copy. This will copy the contents of the template you have selected so that you can make changes and save it as a new template. This is useful, for example, if several doctors in the practice use the same template but use their own letterhead.

You can also download letter templates from our Genie Web Servers. To do this, click the **Download** button, click the small plus **+** to the left of the category you require, tick the checkbox to the right of the letter that you want and click the **Import X Item/s** button. A window will appear allowing you to rename the template before you download it.

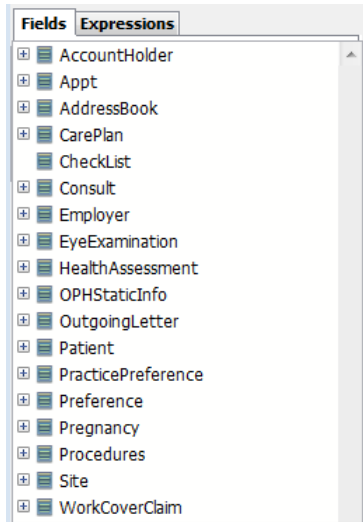


Slow double-click in the *New Name* column, change the name and then click **Save**. This template will now be available when you click the *Template* drop-down menu. You can also download new letter templates from **Special > Software Updates** by clicking on the **Letters** tab (see [Software Updates](#)).

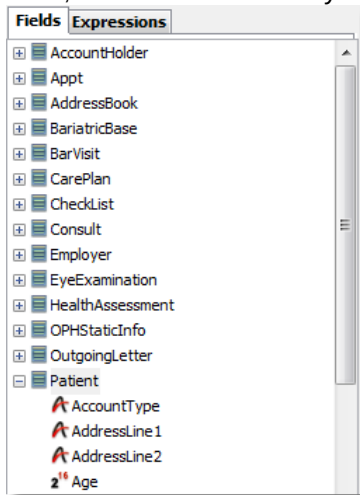
5.15.4 Fields & Expressions Tabs

Fields Tab

The **Fields** tab lists the tables in Genie that can be referenced in a letter.

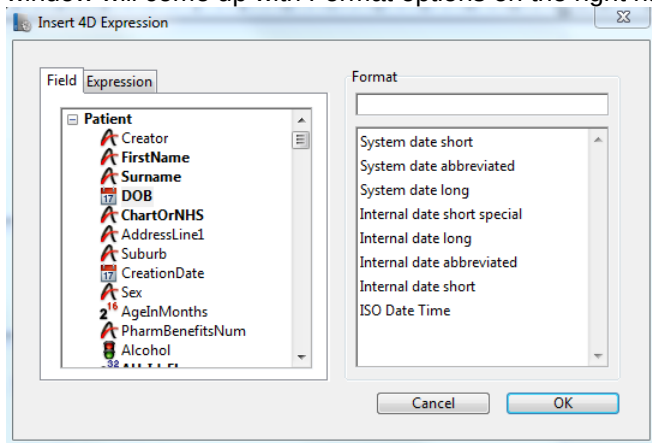


To view the individual fields within the tables, click on the **Little plus** button  (or little arrow) to the left of the table, then insert the field by double-clicking, or dragging and dropping into the template.

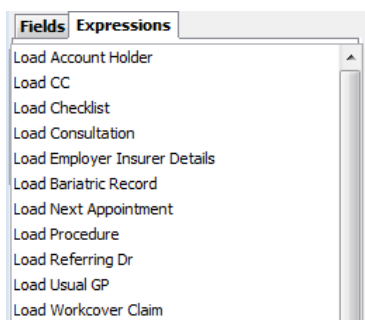


If you would like to insert a patient's DOB, expand the Patient table by clicking on the **Little plus**  button (or little arrow) to the left of the word Patient. You can then either drag and drop DOB into the template, or place the cursor where you would like the field to be inserted in the template, and double-click on DOB.

If you would like to change the format of a field, double-click on it in the template and an Insert 4D Expression window will come up with Format options on the right hand side.

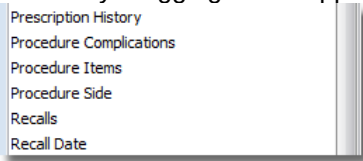


Note: To use a particular Procedure/Consult/Checklist etc. from a patient's clinical record in the letter, **double-click** *Load Procedure/Load Consultation/Load Checklist* etc. in the **Expressions** tab and select the relevant record. If you do not select a specific record, Genie will reference the most recent one.



Expressions Tab

The **Expressions** tab lists common references and clinical fields that can be inserted into the template. You can do this by dragging and dropping, or by double-clicking the expression you require.



If there is information you would like to insert that is not in the **Expressions** tab, you can reference individual fields through the **Fields** tab.

<i>Allergies:</i>	Lists the patient's allergies as well as associated reaction as entered in the Allergies box of that patient's Clinical Window
<i>Anaesthetist's Phone:</i>	Displays for quote templates only and will pull in the phone number for the anaesthetist listed in the procedure record for the selected patient
<i>Current Medications:</i>	Lists the patient's current prescriptions from the script area of the Clinical Window, excluding those marked as category H (Hidden) or S (Single Course)
<i>Current Problems & Current Problems + Notes:</i>	Inserts Current Problems from the Clinical Window in point form or with included notes respectively. You will be prompted how you would like this formatted once in the template, e.g. bullets, indents etc.
<i>Employer Insurance Details</i>	Inserts the patient's Employer's insurance details
<i>Immunisations:</i>	Lists all the immunisations that the patient has had. Includes the date of immunisation
<i>Life Events</i>	Displays any events entered in the Life Events window of the patient's Clinical Window
<i>Obstetrics History:</i>	Inserts overview of the patient's obstetric history.
<i>Past Hx & Past Hx + Notes:</i>	Inserts Past History from the Clinical Window in point form, or with included notes, respectively. You will be prompted how you would like this formatted once in the template, e.g. bullets, indents etc.
<i>Patient's Address:</i>	Inserts the patient's full name and address.
<i>Patient Preferred Name:</i>	Inserts the patient's Preferred Name, as entered in their demographic window, in the Known As field
<i>Picture from Library:</i>	Allows you to insert a picture from your Picture Library
<i>Picture from Consult:</i>	Allows you to insert a drawing that has been saved in a patient's consult record (see Drawing Module).
<i>Prescription History:</i>	Inserts all medications listed in the patient's Script Archive. Scripts are entered in the Script Archive once they have been printed
<i>Procedure Complications:</i>	Loads the Audit Summary from the Post-Op tab of the Procedure window. The procedure can be selected by using the 'Load Procedure' expressions
<i>Procedure Items:</i>	Inserts the item numbers associated with the loaded procedure as entered in the Quotes tab of the procedure
<i>Procedure Side:</i>	Enters the side of the procedure as specified by the tick boxes in the procedure window
<i>Recalls:</i>	Inserts all recalls this patient has listed in their file. Includes the Recall due date and Recall Reason
<i>Recall Date & Recall Reason:</i>	Inserts the appropriate date and recall reason if used from the Recall Due window
<i>Serial Measurements:</i>	This will insert the serial measurements for the selected patient of the reading selected from the window that appears eg. height, weight, BP etc. It is best formatted in Courier or Monaco font.
<i>Sex Expression:</i>	Converts the patient's Sex to an expression eg. him/her or man/woman etc
<i>Sign Off:</i>	Inserts the sign off as specified in user preferences so that the sign off will reflect the person who is logged in when typing the letter, good in a multi doctor practice where all doctors write referral letters.
<i>Smoking Info:</i>	Notes whether the patient is a non-smoker or smoker. If marked as a Smoker (ticked) any extra information entered in the Smoker field will also be inserted
<i>Today's Date:</i>	Brings up a window with options for the format of the date. Once this has been selected, the expression will pull in the current date whenever a letter is created

from the saved template.

Your Letterhead: Copies and pastes the letterhead from Practice Preferences or User Preferences depending on how your practice is configured. Due to the letterhead just being pasted, any changes to the letterhead in preferences will not be reflected in templates; they will need to be edited separately or reinserted into the template.

Note: Current Problems and Past History items marked as 'confidential' (indicated by a tick against the item) will not be inserted into the letter.

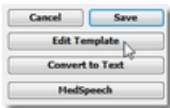
Expressions relevant to the patient that can be added when typing the letter:

<i>Last Measurement</i>	Allows you to insert selected recorded measurements into the body of the letter.
<i>Pathology Results:</i>	Allows you to insert selected Pathology results into the body of the letter
<i>Insert Consult Notes:</i>	Allows you to insert selected Consultation notes into the body of the letter
<i>Insert Checklist:</i>	Allows you to insert checklists which have been added to the patient's Clinical Window
<i>Attachments:</i>	Allows you to insert the selected attachment from the patient's list of images

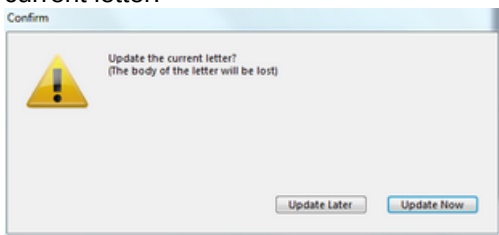
5.15.5 Editing Templates

If you would like to change the font of your letterhead, or make any other permanent changes, you must make the changes in the actual template. If you change it in the letter itself, it will only be changed for that one letter.

To edit a template, select the letter from the *Default Letter* drop-down menu, then click on the **Edit Template** button.



Make any desired changes, and click on the **Save** button. You will be asked if you would like to update the current letter.

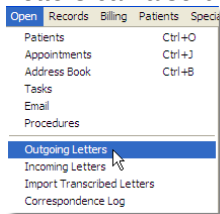


If you click on the **Update Now** button, the current letter will be overwritten with the new template and anything you have already started typing will be lost. Therefore, if you have already started writing a letter, click on the **Update Later** button. This will leave your current letter intact, and the next letter you create will have the changes you made to the template.

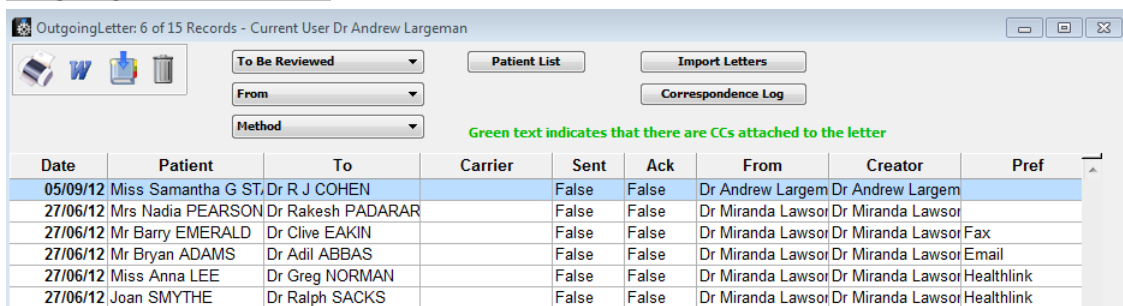
5.15.6 Reviewing Correspondence

This is designed to allow doctors to review letters that have been typed, which can then be printed by the receptionist.

To access letters that need to be reviewed or printed, click on the **Letters to Review** or **Reviewed, Unprinted** buttons in the Navigation Palette or click on the **Review Correspondence** icon  in the Appointment Book. Letters can also be accessed from **Open > Outgoing Letters**.



Outgoing Letters Window



To Be Reviewed will display all letters that have not been reviewed by the doctor, and those that have not yet been printed. To print reviewed letters select *Reviewed but Unprinted*, from the *To Be Reviewed* drop-down menu.

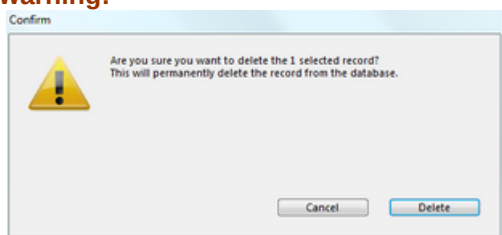
The *Method* drop-down on this page displays the preferred method of communication for the addressee of the letter. You can display just those letters marked for a particular method by selecting it from the drop-down menu. For example, selecting *Mail* will display those letters to be printed and mailed.

Highlight all the letters you would like to print, and click on the **Print** button .

Letters to be faxed or emailed must be opened and sent individually.

Letters that need to be sent via a third party eg. Healthlink must be opened and ticked as *Ready to Send*.

Note: Eventually, all letters in Review Correspondence should end up in the 'Printed' section. Do not delete letters from within Review Correspondence; deleting them from this window will delete the original letter from the patient's Clinical Window. The letters displayed in Review Correspondence are not another copy of the letter from the patient's Clinical Window, it is the same letter, viewed from a different location. Trying to delete letters from with Review Correspondence will result in the following warning:



Reviewing Letters Offsite

Letters can be reviewed offsite in two ways. First, you can use [Offsite Logging](#).

Alternatively, clicking on the **Word** button  in Review Correspondence will export any highlighted letters as Word documents.

They are placed in a folder called Letters Folder inside the Genie folder, on the local machine. If the Letters folder doesn't exist, Genie will automatically create it.

This folder can then be taken home on a laptop or external media device (e.g. USB, external hard drive). The following day, replace the Letters folder in the Genie folder, on the local machine that will import the letters, open Review Correspondence and click on the **Import** button . This will import the Word documents with your changes, and replace the original 4D write documents. You will be asked if you would like the imported letters to be marked as Reviewed.

Once the import has finished, you will be asked if you would like to delete the Word documents in the Letters folder. You should agree to this, otherwise they will still be there the next time you do this, unless you delete them manually.

5.15.7 Importing Remotely Typed Letters

If your letters are typed by a remote typist (i.e. someone not using Genie), Genie has the ability to import and link these letters to the correct patient.

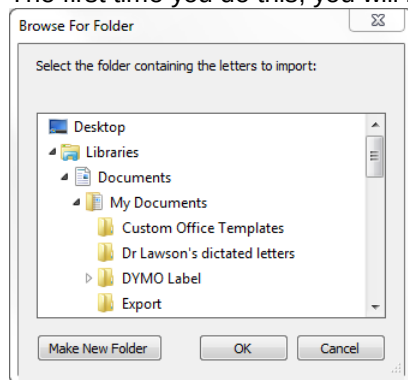
The requirements for this are:

- the letters must be typed in Microsoft Word and saved in RTF format.
- each letter must be in its own document i.e. you can't have 10 different letters in the one Word document.
- the document must be saved using the following naming convention: Surname;FirstName;DOB (in the format of DDMMYYYY), noting the semicolons between each piece of information. For example, a letter regarding John Smith, born on 4 July 1956 should be named: Smith;John;04071956. Alternatively, you can simply use the Patient ID (if known by your typist).

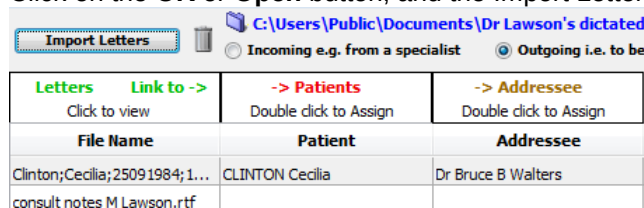
Optionally, you can add the date of the letter to the end of this name, e.g. Smith;John;04071956;22092013. If the date is not added, Genie will use the date of import as the date of the letter.

To import the letters, click on the **Import Letters** button in Review Correspondence or go to **Open > Import Transcribed Letters**.

The first time you do this, you will be asked to identify the folder you have saved these letters in.



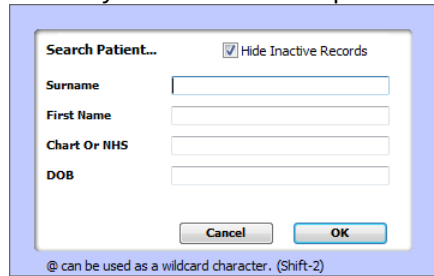
Click on the **OK** or **Open** button, and the Import Letters window will open, as shown below.



The document names are listed in the left-hand column. The patient to whom the corresponding documents should be linked are displayed in the second column.

Genie will attempt to match the correct patient record using the aforementioned naming conventions; either the Patient ID number or a 'Surname;FirstName;DOB' naming convention. If Genie cannot find a suitable match, the Patient column will be left empty.

In this case double-clicking in the Patient column for that letter produces a search window, allowing you to manually locate the correct patient.



A dialog box titled "Search Patient..." with a checkbox "Hide Inactive Records" which is checked. Below the checkbox are four text input fields labeled "Surname", "First Name", "Chart Or NHS", and "DOB". At the bottom are "Cancel" and "OK" buttons. A small note at the bottom left states "@ can be used as a wildcard character. (Shift-2)".

To add the addressee (which will be displayed as the title of the letter in the Contact list in the patient's Clinical Window), click once to view the letter and see who it was addressed to. Double-click to bring up the address book search window and find the correct doctor's record, which will then be inserted into the addressee column. Letters can also be sorted as to whether they are incoming i.e. from a Specialist (through Argus or similar), or outgoing i.e. to a Specialist. Incoming letters will go into *Correspondence In* , and outgoing letters will go into *Correspondence Out* .

Once you have correctly linked all the documents, click on the **Import Letters** button and Genie will import the letters, attaching them to the selected patient.

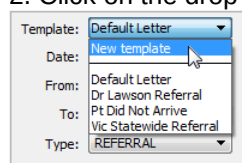
The letters which have successfully been imported will be automatically moved to a Processed folder within the designated Letters folder. Periodically, you should then manually delete these processed letters.

Importing Letterheads

Genie can't import logos or letterheads created in Word documents. Additionally, it can't import anything in a Word header. If you setup LetterheadLink template(s), you will be able to attach this to incoming correspondence when it is linked to the patients file.

Setup

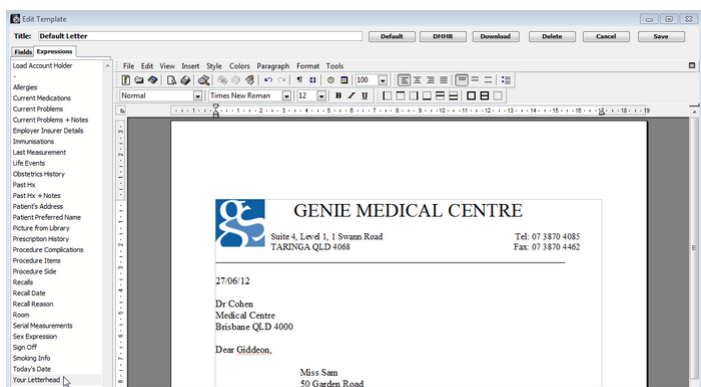
1. Open a Referral/Reply letter via the **Quill**  icon.
2. Click on the drop-down menu that currently says *Default Letter* and select *New Template*.



A dropdown menu for selecting a letter template. The "Template:" label is followed by a dropdown arrow. The current selection is "Default Letter". Below it, a list of options is shown: "New template" (highlighted), "Default Letter", "Dr Lawson Referral", "Pt Did Not Arrive", and "Vic Statewide Referral". Below the list, the "Type:" label is followed by a dropdown arrow showing "REFERRAL".

3. Place your usual letterhead (including any logos) in the body of the letter, *not* in the header area. At the top of the window, name the template exactly: LetterheadLink.
4. You can create additional letterhead templates, naming them LetterheadLink1, LetterheadLink2, and so on. This is useful in practices where each doctor has his or her own letterhead.

Note: The logos you insert must already be in your Picture Library. You can insert them into the template using the *Picture from Library* expression in the Expressions Tab on the left hand side of this window.



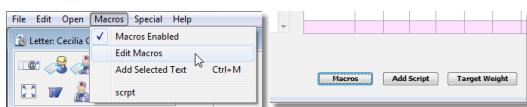
When importing a letter through the **Import Letters** button in Review Correspondence, Genie will slot the information in your LetterheadLink template above the text that is imported from the Word document.

5.15.8 Macros

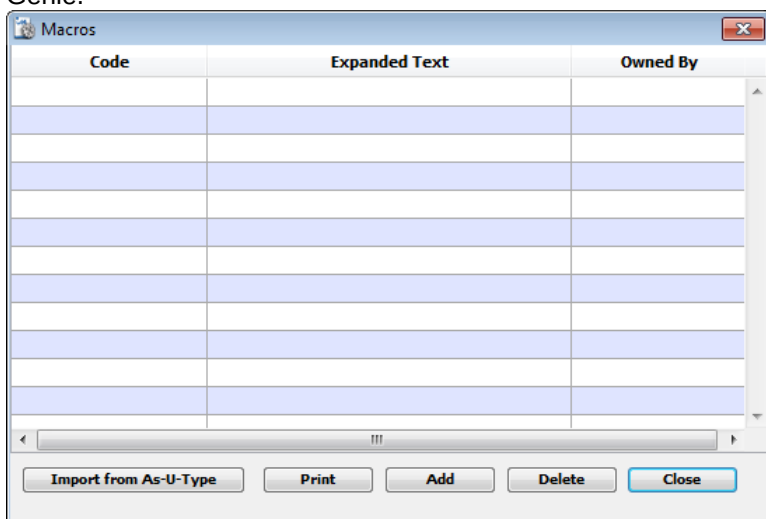
A macro is a text shortcut within Genie that can be used to quickly insert information when a short code is typed, in order to aid in faster note taking or transcription. The macro feature is available in Letters, Consults, SMS reminders, and certain fields in Pregnancies, IVF, Checklists, Tasks, Email, and Procedures.

Macros are user-defined and you can have as many as necessary, so they can be used to quickly insert commonly-used information, such as long medication names that could otherwise be easily misspelled.

They can be added and modified through the Macros list. The list can be accessed through the Macros menu, which is accessible in any letter editing window - i.e. when editing a referral/reply letter or a merged letter - by navigating to **Macros > Edit Macros**. It can also be accessed by clicking the Macros button at the bottom of the Edit Consult window.



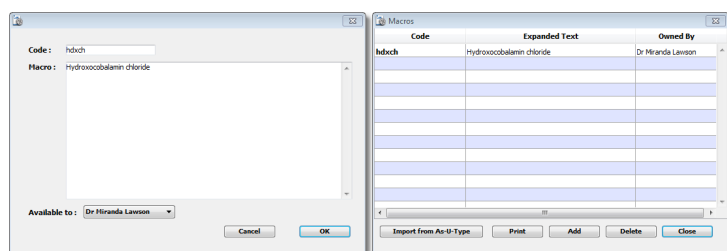
Selecting either of these will open the Macros list, which will show any macros you currently have saved within Genie.



To print a list of your macros for use as a quick reference, click the **Print** button.

To add a new macro, click the **Add** button. A window will appear allowing you to enter the text of the macro, and the code you wish to use to trigger it. You can also use the *Available to* drop-down menu to specify a single user for to whom this macro applies. If a user is selected from this menu, the macro will only work for that user; any other user who types the same code will not trigger the macro.

Click the **OK** button to save the macro. It will then appear in the macros list.



Once a macro has been added, it can be triggered in macro-enabled writing areas of Genie by typing the code and pressing the Space or Return/Enter key on your keyboard. The macro code will be replaced by the expanded text instantly. In a consult window, the drop-down arrow above each text field contains a list of available macros for easy selection as well.

If you currently use Spellcatcher or As-U-Type, you can import your existing macros by using the **Import from As-U-Type** button. This will give you instructions on how to first export your existing macros, ready to import into Genie.

You can also have Genie automatically insert today's, tomorrow's, or yesterday's date. To do this, create a macro with any code and ensure that the *Macro* field displays the following text:

```
<td>    Today's Date
<tm>    Tomorrow's Date
<yd>    Yesterday's Date
```

5.15.9 Transcription Services

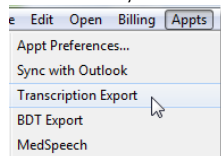
Genie is capable of exporting data for use by many transcription services, including: Global Transcription Services, NTS Transcription, Ozescribe, Syberscribe Pacific Solutions, Medical TranscriptionPlus, AnsellMT, Professional Transcription Solutions and BDT.

Once the nominated transcription service has typed the letters, you should be able to retrieve them as RTF files. The letters can then be imported into Genie and automatically linked to the correct patient record. The following sections outline the export and import processes that facilitate this.

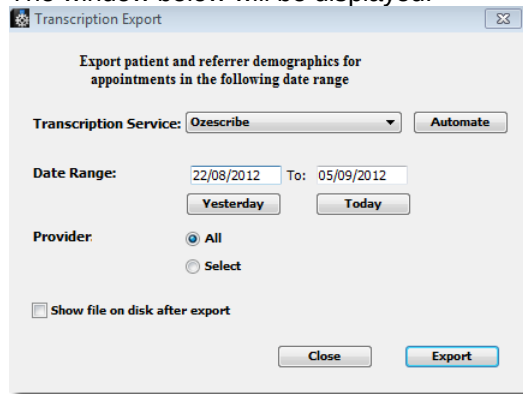
5.15.9.1 Exporting Demographics

Rather than having to dictate the patient and referring doctor's demographic information for each letter, Genie can export this information from the Appointment Book window for all appointments within a selected period.

To do this, select **Appointments > Transcription Export**



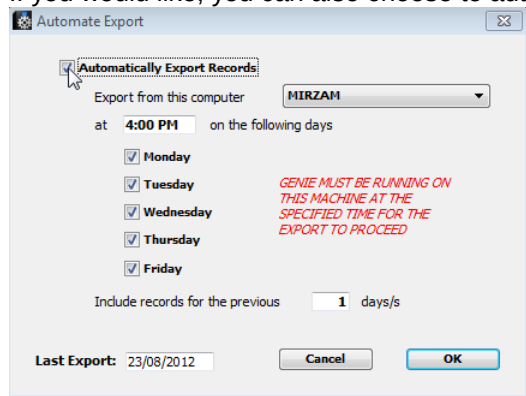
The window below will be displayed.



Select which Transcription service you use from the drop-down menu. The default date range is for the previous fortnight, however, this can be changed if you prefer.

In a multi-doctor practice, you can also select just a particular doctor.

If you would like, you can also choose to automate this process by clicking on the **Automate** button.



When you tick the *Automatically Export Records* tickbox, it will select every day of the week by default. If you would like omit any day(s), simply untick the relevant tickbox. As per the red text, make sure the computer you have nominated to do this automatic export is on and running Genie at the specified time.

Once you made your selections, click on the **OK** button to proceed with the export. Two files are exported: 'Patients.txt' and 'Associates.txt'. They will be placed inside a folder named 'OzscribeOut', 'SyberscribeOut' or 'NTS_Out' which will be automatically created inside your Genie folder.

The 'Patients.txt' file and the 'Associates.txt' file are not automatically deleted once they have been uploaded to Ozscribe, Syberscribe or NTS. These will, however, be automatically overwritten each time you do this export.

Note: The same process applies for BDT Export (Appts > BDT Export) but you must highlight the patients required for the export on a daily basis.

5.15.9.2 Importing Returned Letters

The letters created by Ozscribe will be named with either the patient's ID number, or be in the format of 'Surname;FirstName;DOB'.

Note: The patient's ID number is the internally generated Patient ID field, displayed in the top left corner of the Patient Demographics window. It is not the file or chart number which either you or Genie may have entered in the Chart field.

To import returned letters from either Ozscribe, Syberscribe, NTS or BDT, follow the steps outlined in [Importing Remotely Typed Letters](#)

5.16 Electronic Correspondence (Sending via 3rd Party)

Correspondence such as referral/reply letters can be sent to and received from other doctors electronically via a third party encryption program into Genie.

Note: Genie currently supports the following 3rd Party Providers:

- 2 Hippo
- AllTalk or EQuery
- Argus
- DivisionReport
- ePIT
- Healthlink
- Medical Objects
- Medinexus
- Promedius
- ReferralNet

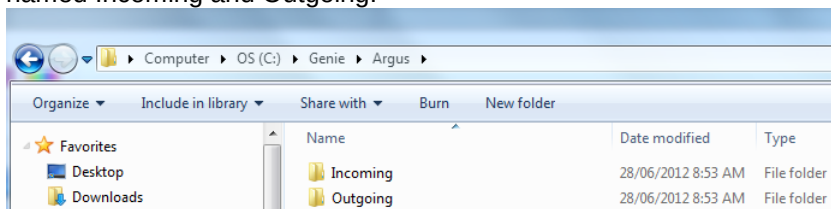
These are companies which act as a “middle man” for the secure storage and forwarding of encrypted letters between doctors.

To send letters via these programs, both doctors must be signed up to the respective program. Therefore, a doctor may need to be signed up with two or three carriers in order to send letters to his/her most commonly referring GPs.

Setup

If your provider is Alltalk/EQuery or DivisionReport, it is important to enter the Carrier Identifier assigned to you by this provider in the **Carrier Identifiers** tab of Practice Preferences. See [Carrier Identifiers](#) for more details. If you use 2Hippo or ReferralNet, an ID needs to be put in the **General** tab of each doctor's User Preferences. If you use Healthlink, you can access a separate configuration window by clicking on **Configure Healthlink** in the Correspondence Log. For more information on Healthlink configuration, please see [Configuring Healthlink](#).

On the computer with the 3rd party program installed, create a folder inside the Genie folder and name it exactly the name of the software installed, as per the list above (eg. Argus). Inside this folder, create another two folders named Incoming and Outgoing.



The 3rd party software will need to be configured by the 3rd party company to use these Incoming/Outgoing folders for its correspondence. This is not something the Genie Solutions helpdesk can help you with.

Limitations:

- Only one instance of the program can be running on the network.
- The 'Incoming' and 'Outgoing' folders must NOT exist on the server.
- There must not be more than one 'Incoming' and 'Outgoing' folder on the network, i.e. you cannot have these folders on more than one machine.

5.16.1 Writing the Letter

After writing a letter you intend to send via 3rd party, tick the *Send via 3rd Party* tickbox. You will then need to select the carrier from the drop-down menu (if it isn't already set in the recipient's Address Book record) and click **Save** to save and close the letter.

The screenshot shows a window with several checkboxes on the left: ☐ Send via 3rd party, ☐ Ready To Send, ☐ Sent from Genie, ☐ Delivery Acknowledged, ☐ Reviewed, ☐ Printed, ☐ Flag for Followup, ☐ Reply Received, ☐ Can't Delete, and ☐ Spellchecking. There is a dropdown menu for 'Prefers: Medical Obj...' and a 'Cancel' button. On the right, there are buttons for 'Save', 'Edit Template', 'Convert to Text', and 'MedSpeech'.

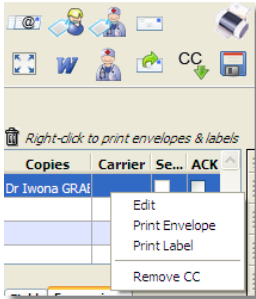
Once the letter has been reviewed, tick the *Ready to Send* tickbox and save the letter. This will export the letter in HL7 format into the "Outgoing" folder that was set up previously.

Note: You can actually create the letter on any computer in the network, but it is only exported on the computer with the Outgoing folder.

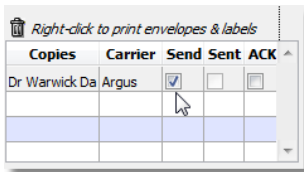
Genie checks for any letters to be exported every five minutes, or by **Ctrl+clicking** on the **Quill** icon.

Note: The Delivery Acknowledged button is deliberately disabled. This is automatically ticked when Genie receives an ACK back from the addressee.

CC letters can be sent electronically also, their Preferred Method of Communication just needs to be entered in their Address Book entry. This can be done by right-clicking on the CC and selecting *Edit*.



Provided the *Send* tickbox is ticked, the letter will also be sent to the CC via the corresponding 3rd Party once it is saved.



You can still send CC letters via a 3rd party if the primary recipient does not have a 3rd party carrier. Tick the *Send* for the CC but leave the *Send via 3rd Party* unticked as this refers to the primary recipient only.

5.16.2 Checking Imported Letters

Genie also checks the Incoming folder for letters and delivery acknowledgements (ACKS) every five minutes. If it finds a new letter, it will be imported into Genie automatically. Additionally, if the preference is set in the **Carrier Identifiers** tab of Practice Preferences, a task will be sent to the Addressee of the letter. If Genie cannot determine who the Addressee is, the task will be sent to the Administrator of Genie.

To review any incoming letters, go to **Open > Incoming Letters**

IncomingLetter: 5 of 5 Records - Current User Dr Andrew Largeman

Doctor: **All** Linked?: **Unlinked**

Date	Surname	First Name	Sender	Addressee	Type
27/06/12	FRANKLIN	Amanda	R J Cohen	Dr Andrew Largeman	Imported Letter
27/06/12	LEE	Vincent	R J Cohen	Dr Andrew Largeman	Imported Letter
27/06/12	NORMAN	Susi	R J Cohen	Dr Andrew Largeman	Imported Letter
27/06/12	STATE	Samantha	R J Cohen	Dr Andrew Largeman	Imported Letter
27/06/12	STATE	Samantha	R J Cohen	Dr Andrew Largeman	Imported Letter

You can select letters to a certain doctor by selecting their name from the *Doctor* drop-down list. Double-click on the first letter to begin reviewing.

Number 1 of 6 letters

Samantha STATE
09/06/81

Samantha STATE

09/06/1981
3485 76348 5

Match Find Link Unlink New Clin Edit Print

New Task New Recall Delete Close

Date: 07/09/12 Sender: Dr R J COHEN Linked By: Imported: 07/09/12 09:05
Addressee: File Name:

File Edit View Insert Style Colors Paragraph Format Tools

Normal Times New Roman 12 B I U

07/09/12

Dr A Largeman
Genie Medical Centre
Brisbane QLD 4000
Ph: (07) 3870 4085

Dear Andrew,

RE: Miss Samantha STATE
DOB: 09/06/81

Reviewing letters is very similar to checking your pathology and radiology results (see [Matching & Linking Results](#)). Genie will try to **Match** the letter as best it can to someone in the database otherwise you can create a **New** patient based on the information given in the letter. Once the letter is matched you can **Link** it to the patient's Clinical Window and it will move to the next letter for linking.

The **Open RTF** button will only appear if the letter contains RTF format data. This button allows you to open the letter in an external viewer. Once linked to the patient, the letter can be open in an external viewer by right-clicking on the letter in the [Contact List](#) and selecting *Open RTF* or double-clicking on the result in the Contact list and clicking the **Open RTF** button.

Rich Text Format (RTF) Letters

If the incoming letter is received in RTF format, the linking process is slightly different depending on whether you have the *Import RTF Letters to 4D Write* ticked in Practice Preferences under the **Carrier Identifiers** tab. Ticking this MAY allow the conversion of the RTF files into 4D Write in which case they will go into **Open > Incoming Letters** and the above linking process will apply.

When the PIT file contains an RTF document, the process will be different depending on your preferences.

If you do not have Import RTF Letters to 4D Write ticked.

1. A Patient gets created if it does not already exist in Genie.
2. The Document gets imported as an Attachment straight onto the patient file (red paperclip - not blue quill)
3. A task is generated (provided *Create a task when importing a letter* is ticked in the **Carrier Identifiers** tab of Practice Preferences).
4. There is NO Incoming Letter record generated.
5. A record is generated into the Correspondence Log (Received).

If you do have Import RTF Letters to 4D Write ticked.

1. The Document gets imported as an Incoming Letter. (When Linked, appears as a letter on the Patient file (blue quill)).
2. A task is generated (provided *Create a task when importing a letter* is ticked in the **Carrier Identifiers** tab of Practice Preferences).

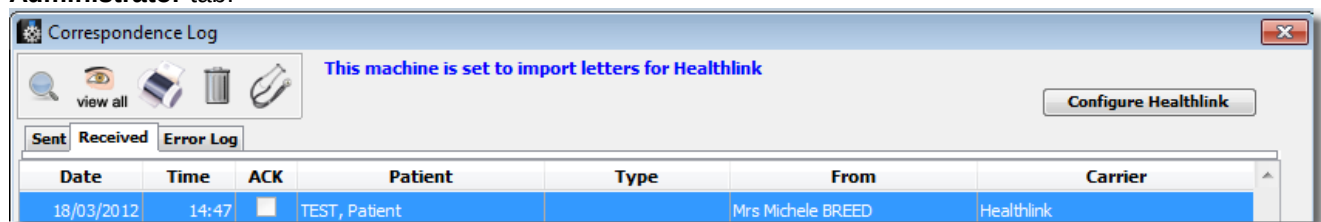
3. A record is generated into the Correspondence Log (Received).

If letters come in blank or scrambled, untick *Import RTF Letters to 4D Write* and Genie will automatically attach them to the patients chart as an image. In order to do this, Genie searches for the correct patient, by matching surname, first name and DOB with the information held within the incoming letter. If it doesn't find a matching patient, it will create a new patient record using the information within the incoming letter. For more information on the naming conventions required for Genie to automatically match a letter, please see the [Automatic Linking Requirements](#).

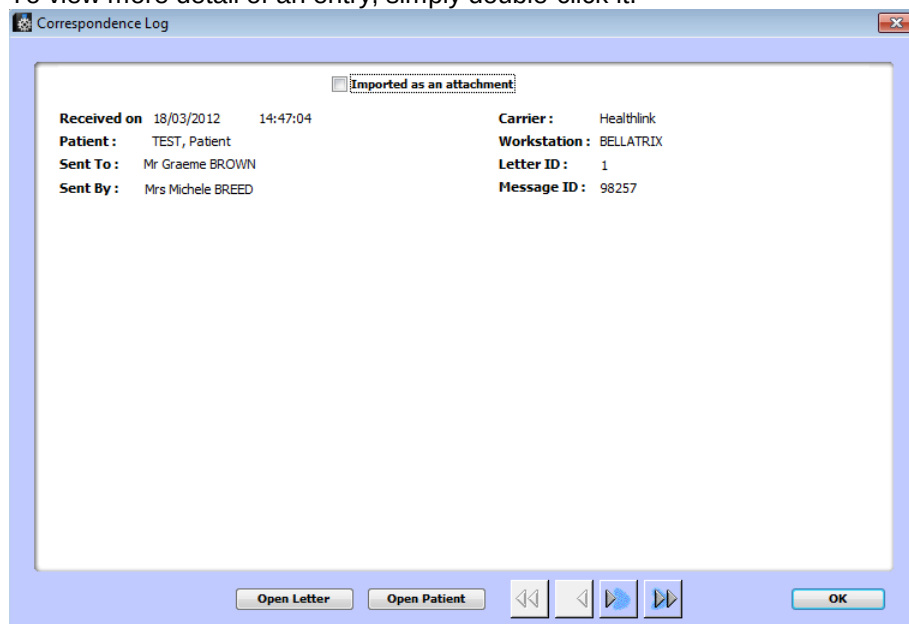
Correspondence Log

Genie also keeps a log of all outgoing and incoming letters, so that you can see exactly when and on which computer any letter was imported or exported, and also whether it has been read yet or not. This is also how you can find out which 3rd party carriers this machine exports/imports for, if any.

The Correspondence Log can be accessed via **Open > Correspondence Log** OR through Review Correspondence by clicking the **Correspondence Log** button OR through **File > Maintenance & Reports, Administrator** tab.



To view more detail of an entry, simply double-click it.



Configuring Healthlink

In the Correspondence Log, you will also notice a button labelled **Configure Healthlink**. This button opens the window below.

Name : Healthlink

Identifier :

Computer : Select the computer on which this carrier is installed

Config File :

This is the path to the file named 'hms_config.xml'.
This is usually found in the 'HLINK' directory at the root of your hard drive.
e.g. "Macintosh HD:HLINK:hms_config.xml"
or "C:\HLINK\hms_config.xml"

If you have Healthlink installed on the server, or another computer on your network, you will need to select that computer using the dropdown menu above, and then type the correct pathway to this file.

If Healthlink is installed on this computer, just use the 'Browse' button to select it.

In this window, you are able to enter in your *Identifier*, *Computer*, and browse to your *Config file*. The Config File is usually found in the following locations:

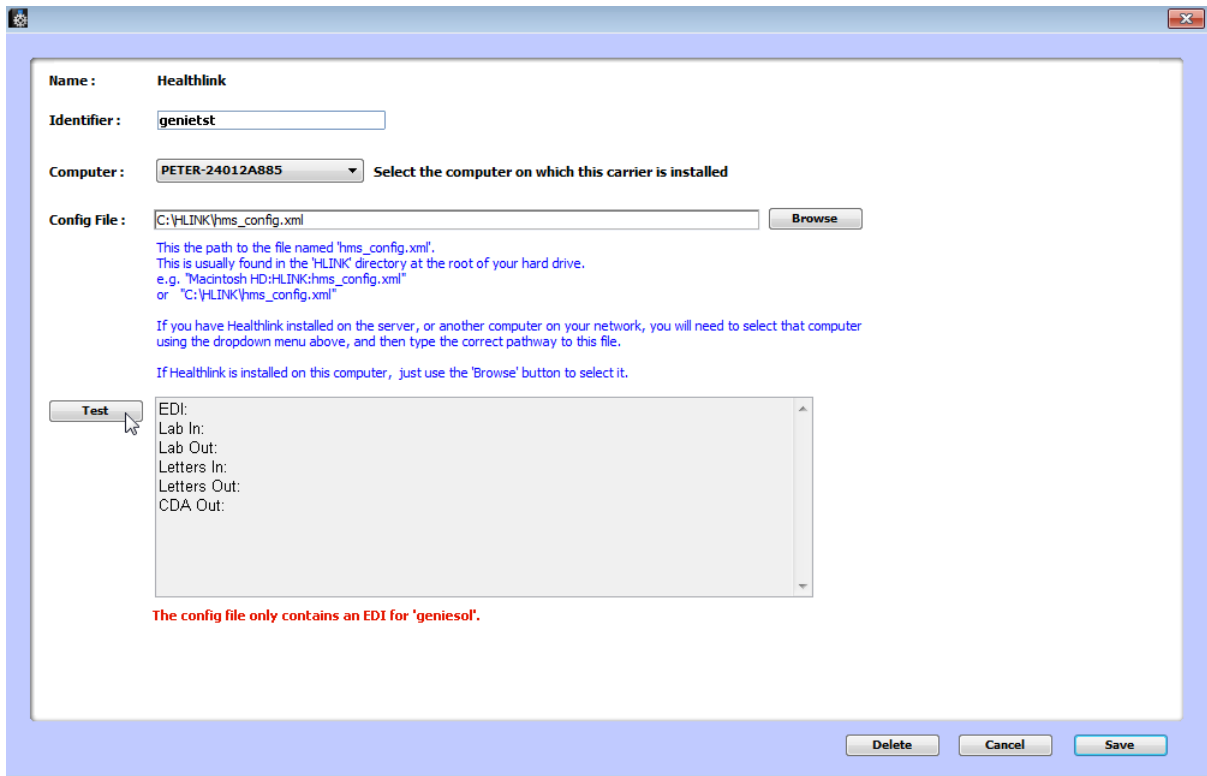
- Macintosh HD:HLINK:hms_config.xml (Mac)
- C:\HLINK\hms_config.xml (Windows)

Once you have entered these settings, press the **Test** button to test if these are correct.

Note: This test can only be performed on the machine on which the Healthlink program is installed; this may be your server if you have a network.

Possible Error Messages

If the Identifier you have entered in this window does not match your XML file, you will be presented with the message below.



Name : Healthlink

Identifier : genietst

Computer : PETER-24012A885 Select the computer on which this carrier is installed

Config File : C:\HLINK\hms_config.xml Browse

This is the path to the file named 'hms_config.xml'.
This is usually found in the 'HLINK' directory at the root of your hard drive.
e.g. "Macintosh HD:HLINK:hms_config.xml"
or "C:\HLINK\hms_config.xml"

If you have Healthlink installed on the server, or another computer on your network, you will need to select that computer using the dropdown menu above, and then type the correct pathway to this file.

If Healthlink is installed on this computer, just use the 'Browse' button to select it.

Test

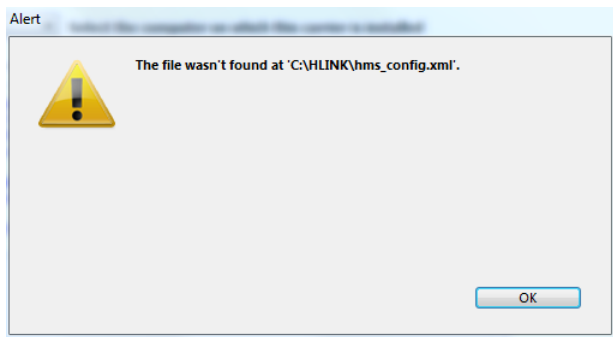
EDI:
Lab In:
Lab Out:
Letters In:
Letters Out:
CDA Out:

The config file only contains an EDI for 'geniesol'.

Delete Cancel Save

In the above example, you can see the Identifier is listed 'genietst'. As per the red error message, the Config File is for the Identifier 'geniesol', so the Identifier in this window will need to be changed to match this.

If the file is not found at the location you have browsed to, you will receive the error message below.



This is able to be rectified by browsing to the correct location, or typing the correct file path into the *Config File* field.

Note: If you have Healthlink installed on your server machine, you **MUST** type this file path in manually after selecting the correct computer from the *Computer* drop-down menu.

If the correct settings have been entered, you will be presented with the window below upon pressing **Test**.

Name : Healthlink

Identifier :

Computer : Select the computer on which this carrier is installed

Config File :

This is the path to the file named 'hms_config.xml'.
This is usually found in the 'HLINK' directory at the root of your hard drive.
e.g. "Macintosh HD:HLINK:hms_config.xml"
or "C:\HLINK\hms_config.xml"

If you have Healthlink installed on the server, or another computer on your network, you will need to select that computer using the dropdown menu above, and then type the correct pathway to this file.

If Healthlink is installed on this computer, just use the 'Browse' button to select it.

EDI: geniesol
Lab In: C:\HLINK\HL7_in\LAB2\
Lab Out: C:\HLINK\HL7_out\LAB2\
Letters In: C:\HLINK\HL7_in\RSDAU\
Letters Out: C:\HLINK\HL7_out\RSDAU\
CDA Out: C:\HLINK\HL7_out\LAB2\

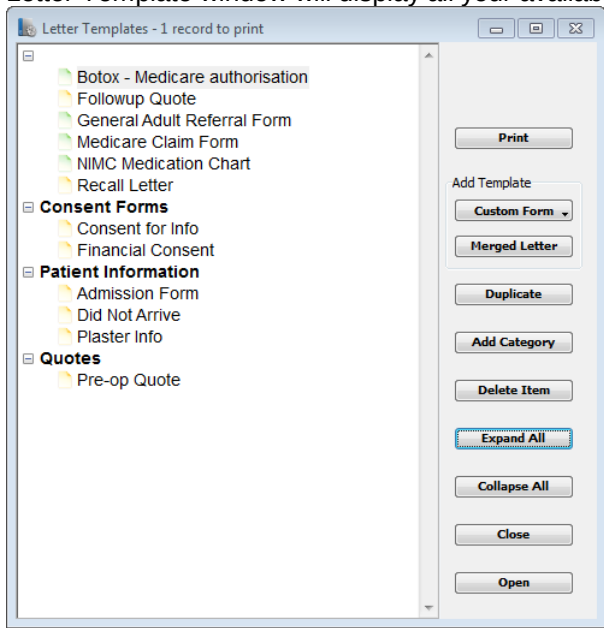
You can now press **Save**, and your Healthlink configuration is complete.

5.16.3 3rd Party Providers

Company	Address	Phone	Email	Website
ArgusConnect	Suite 4 Greenhill Enterprise Centre University Drive Mt Helen Victoria 3350	(03) 9037 1000	Sales: argus@health.telstra.com Support: argussupport@health.telstra.com	www.argusconnect.com.au
DivisionReport	Level 36 60 Margaret Street Sydney NSW 2000	(02) 9290 9890	sales@cnshealth.com.au	www.cnshealth.com.au
eClinic	657 Nicholson Street Carlton North VIC 3054	(03) 9381 4567	helpdesk@eclinic.com.au	www.eclinic.com.au
eQuery	2 Hunter Street Cranbourne VIC 3977	(03) 5995 7880	support@lrsupport.com.au	www.gippspath.com.au/equery.htm
2Hippo		1300 789 828	assist@2hippo.com	www.2hippo.com
Healthlink	Geoff Sayer PO Box 566 Caringbah NSW 2229	1800 125 036	Geoff.Sayer@healthlink.net	www.healthlink.net
Medemail		1800 006 818		www.medemail.com.au
Medical Objects	P O Box 5048 Maroochydore BC QLD 4558	(07) 5456 6000	info@medicalobjects.com.au	www.medical-objects.com.au
ProMedicus	450 Swan Street Richmond VIC 3121	(03) 9429 8800	support@promedicus.com.au	www.promedicus.com.au

5.17 Letter Templates

Letter templates can be created or opened by clicking on the **Merged Letter Templates**  button. This Letter Template window will display all your available letter templates and forms:



In this window, existing merged letter templates will be listed with a yellow page  icon and existing custom forms will be listed with a green page  icon.

Print will print the highlighted letter template for the selected record/s.

Custom Form allows you to create a new form to add to this list. Right-clicking on this button will bring up a menu that will allow you to download forms created by other Genie users. For more information, see the Forms Module.

Merged Letter allows you to create a new letter template to add to this list. For more information, see [Merged Letters](#).

Duplicate allows you to copy the currently selected letter template. This can be useful if you want to make several letter templates that are similar but with slight variations. When you click **Duplicate**, you will be prompted to enter a new name for the duplicate template.

Add Category allows you to add a new category so that you can organise your letter templates. You can add existing letter templates to a category by dragging and dropping the letter template into the relevant category. Templates can also be moved between categories by dragging and dropping the template from one category to another.

Delete Item will delete the selected template or category. Templates that are inside a category when it is deleted will be moved into the unspecified category at the top of the list.

Expand All will expand all categories in order to see all templates. To expand one category click on the little plus  button to the left of the category name or by double-clicking on the category.

Collapse All will collapse all categories so that you cannot see the templates.

Close will close the Letter Template window.

Open will open the selected letter template or form.

5.17.1 Merged Letters

Merged Letters are letters that are generally used to provide information to the patient or to another provider (e.g. change of practice details, consent form etc.). In general, they should not require addition information to be added on a case-by-case basis. They are very similar to Referral/Reply letter templates (see [Referral/Reply Letters](#)), except they do not link a patient with a provider in the Address Book.

The letter templates can be accessed from many different windows in Genie, including the:

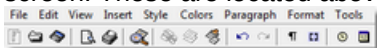
- Appointment Book
- Patient Demographics
- Clinical Window
- Patients List*
- Address Book*
- Account Holders*

***Letters printed from the Patients List, Address Book or Account Holders List will print for all records displayed in the list, not just the highlighted records. To use only select records in the list, highlight the required records and go to **Records > Use Selected**. Letters printed from the Appointment Book, the Patient Demographics or the Clinical Window will print the letter only for the selected patient.**

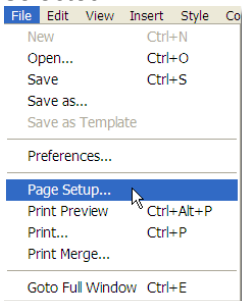
5.17.1.1 Setting up the 4D Write Area

Before filling the body of the letter, it is a good idea to perform a few basic setup tasks.

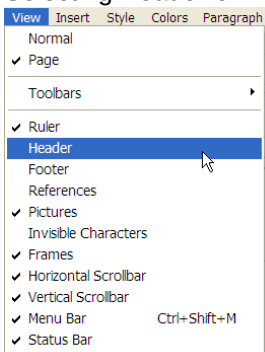
All the menus described below are within the 4D Write window, not the main Genie menus at the top of the screen. These are located above the 4D Write toolbar, as seen below:



First, select **File > Page Setup** and make sure the page size is set to A4, and the correct printer has been selected.



You can use the View menu to determine whether you would like to include headers and/or footers in your letter. Selecting *Header* or *Footer* from this menu will either tick, or untick this option.



Headers are a separate area at the top of a word processing document. These print on every page of a multi-page document, and are usually used for page numbering. Footers are a separate area at the bottom of the page, and also print on every page of a multi-page document.

Finally, you should set the printable margins.

The numbered scales along each side of the letter are called Rulers. If you place the cursor over the current margin setting, it will become a double-ended arrow as in the picture below.



You can now click and drag the margin left or right to suit. This has the effect of adjusting the width of the body of the letter. You can do the same for the other three sides of the template to adjust the left, right and bottom margins.

If you are using a header, clicking within the header area allows you to do the same to adjust the size of the header.

Click **Save**  to save the template.

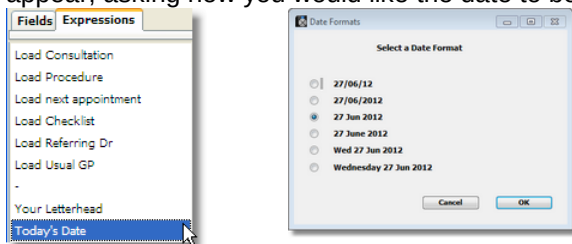
5.17.1.2 Creating the Letter

The actual letter can be created quite quickly using the **Expressions** tab. This allows you to insert various pieces of data at the point where the cursor is flashing, by either double-clicking or dragging and dropping the required Expression. For more information on what each expression will insert, refer to [Referral/Reply Letters](#).

Let's run through how to set up a basic letter addressed to the patient.

First, highlight *Your Letterhead* in the **Expressions** tab, and either double-click or drag and drop this expression into your letter. This inserts the Letterhead you have set up in either Practice Preferences, or your individual User Preferences (**File > Practice Preferences** or **File > User Preferences**).

Press **Enter** to move down a line, then select *Today's Date* from the **Expressions** tab. The following window will appear, asking how you would like the date to be formatted.

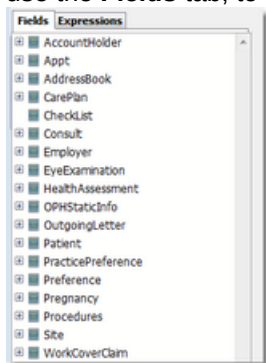


Note: You can change the Date Format at any time by double-clicking on the Date on the page.

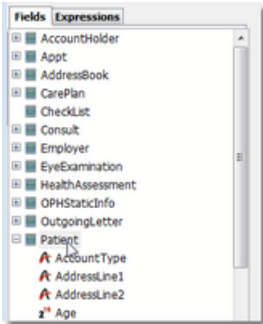
Move the cursor down another couple of lines, and select *Patient's Address* from the **Expressions** tab.

Move the cursor down another couple of lines, then begin the actual letter. Type 'Dear '.

Now you must reference the patient's title and Surname, so that regardless of the patient we send the letter to, the letter will have their correct title and name e.g. 'Dear Mr Smith' or 'Dear Mrs Jones'. To do this we will need to use the **Fields** tab, to reference the *Title* field.



This displays a list of tables in the database available for referencing within letters. In this situation, we would expand the Patient table by clicking on the **Little plus**  button (or little arrow) to the left of the word Patient. All the fields in the *Patient* table will appear in a list.



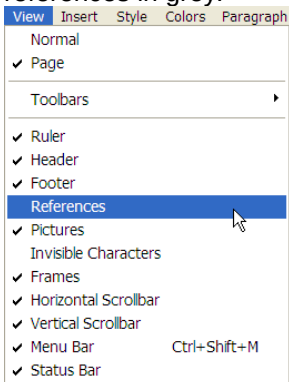
Select the *Title* field as shown below, and either double-click or drag and drop this field onto the template.



Repeat these steps to insert the *Surname* field.

You can then proceed to write the desired letter. For example, you could write a recall letter using *Recall Date* and *Recall Reason* in the **Expressions** tab, or an Appointment Reminder/Medical Certificate letter using the *[Appt] Start Date* from the **Fields** tab.

You can see what references you have inserted by clicking the **View > References** which will display the references in grey.

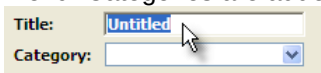


Alternatively, you can use the **View References**  button in order to display the references. This is located just below the Format menu in the 4D Write toolbar.

Note: Be sure to turn this view off before saving the template. Otherwise, your templates will print out with the references instead of the patients details!

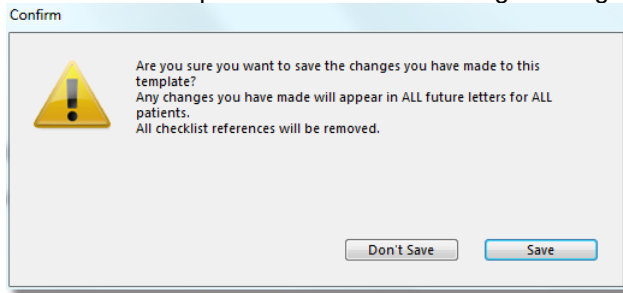
5.17.1.3 Saving/Deleting the Template

You can name the template in the *Title* box and place it in a template category using the *Category* drop-down menu. Categories are added through the Letter Template list, see the beginning of this chapter.



Any changes you make to the template are not actually saved until you click on the **Save** button .

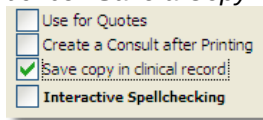
You will then be provided with the following warning:



If you close the template via either the **Close** button, or the **Close Window** button , without clicking the save button first, none of the changes you have made to the template will be saved. This allows you to open and make patient specific changes to a template without saving these changes for all future patient.

Saving A Copy In Patient Notes

If you would like to save a copy of the letter in the relevant patient's Clinical Window after printing, select the tickbox *Save a Copy in Clinical Record*.



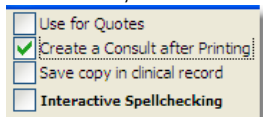
This would usually be done if the letter had medico-legal significance. In a year's time, you would still have an exact copy of what was mailed to the patient; the actual template may well have been modified, or even deleted during this time.

The copy of the letter is created when the letter is actually printed, or emailed. If you were not actually printing the letter but still wanted to create a copy in the patient's record, you can click on the **Copy Without Printing** button  to the right of the **Print** button.

Creating a Consultation Note

Alternatively, you can choose to have a consultation record created with a note like "<Template Name> sent 25/6/12" automatically inserted.

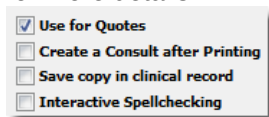
To do this, select the *Create a Consult after Printing* tickbox.



Use for Quotes

Selecting the *Use For Quotes* tickbox will make this template available from within the Procedure window.

However, you would normally create a quote template from within the procedure. See [Creating Quote Templates](#) for more details.



Deleting Templates

Templates can be deleted from your list of Templates by clicking the **Delete Item** button in the Letter Templates list, for more information on this, see the beginning of this chapter.

5.17.1.4 Printing Merged Letters

Clicking on the **Print** button at the top right of the template window will print the template for the selected record (s).



If you are printing from a list (e.g. printing for one or more patients, account holders, or address book entries), you will be asked to confirm that you would like to print a letter for all of the displayed results. If you would only like to print to a selection of records in the list, highlight the records required and then go into **Records > Use Selected**.

Note: If any of the displayed patients have been marked as inactive or deceased, a letter will not be printed for them.

5.18 Recalls

Recalls are setup either in the Clinical Window, through **Patients > Add a Recall**, or **Appts > Add a Recall**

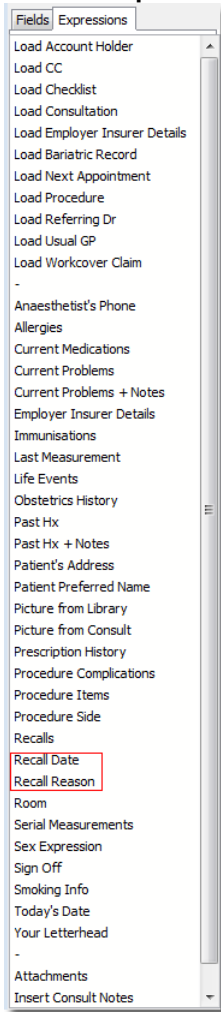
For more information on adding Recalls, see [Recalls](#) in the Clinical Module.

5.18.1 Creating a Generic Recall Template

In order to print out the recalls when they fall due, you first need to create a Merged Letter Template. You can have as many different types of letters as you like. For example, you may have a specific letter template for Pap Smear recalls, and a different template for Fluvax recalls.

You can also create a generic recall letter which simply states the reason for the recall and the due date. For instructions on how to new merged letter templates, please refer to the [Merged Letter Templates](#) chapter.

Use the **Expressions** tab to reference the *Recall Reason* and *Recall Date* fields.



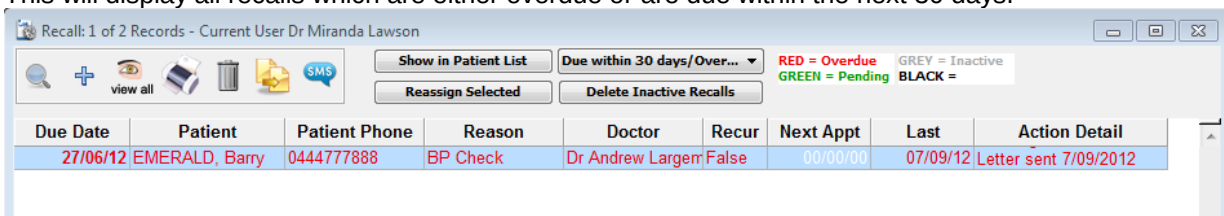
The text of your letter might read something like this:

"Our records indicate that you are due for «[Recalls]Reason» on «[Recalls]Due Date»"

5.18.2 Recalls Due

On a weekly or monthly basis, you can access your recalls in four ways: selecting the **Recalls Due** icon  in the Appointment Book, clicking the **Overdue Recalls** button in the Navigation Palette, going into **Patients > Recalls Due**, or going into **Appts > Recalls Due**.

This will display all recalls which are either overdue or are due within the next 30 days.



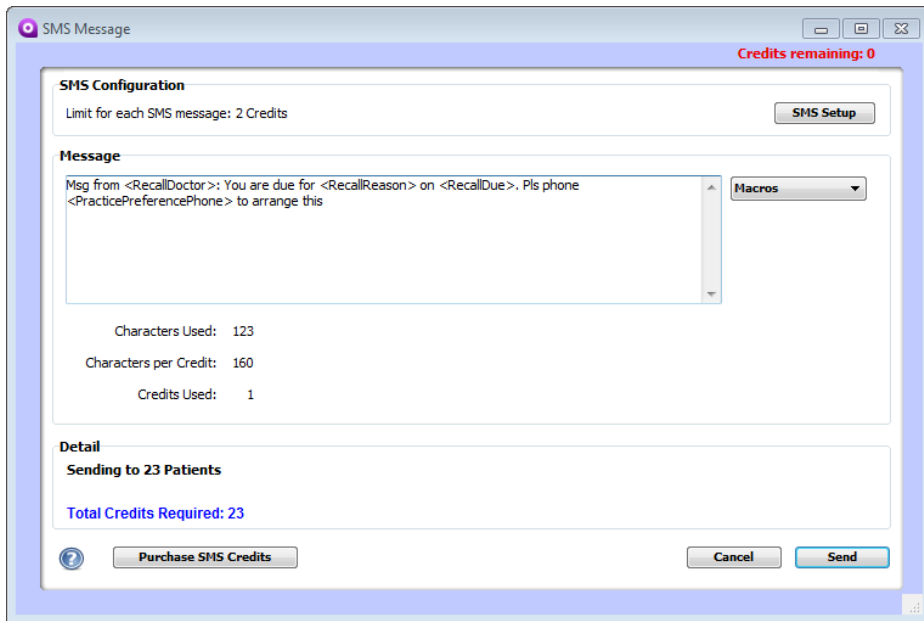
Overdue recalls display in red, recalls due in the next 30 days display in green. The list of recalls can be sorted by any column by clicking on the header of that column. From here you can either phone the patient direct, print a recall letter, or SMS the patient about their recall.

To SMS all patients in the Recalls Due list with a mobile number recorded in their demographics, click the **SMS** button . To SMS an individual patient about their recall, **right-click** on the patient and select **SMS**.

Patient	Pt Phone	Reason
Caelli, Toni G		Flu/ax

Open Clinical Window
Last Consult
SMS

If you click the **SMS** Button  or SMS a patient individually, you can make any necessary adjustments to the default message in the subsequent *SMS Message* window.



SMS Message Credits remaining: 0

SMS Configuration
Limit for each SMS message: 2 Credits SMS Setup

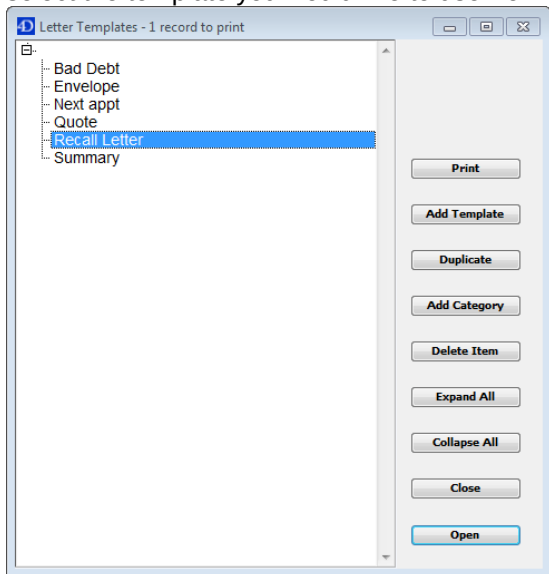
Message
Msg from <RecallDoctor>: You are due for <RecallReason> on <RecallDue>. Pls phone <PracticePreferencePhone> to arrange this Macros

Characters Used: 123
Characters per Credit: 160
Credits Used: 1

Detail
Sending to 23 Patients
Total Credits Required: 23

? Purchase SMS Credits Cancel Send

To print a recall letter, highlight the required patients, and click on the **Merged Letter Template** button  to select the template you would like to use from the Letter Templates list.



Letter Templates - 1 record to print

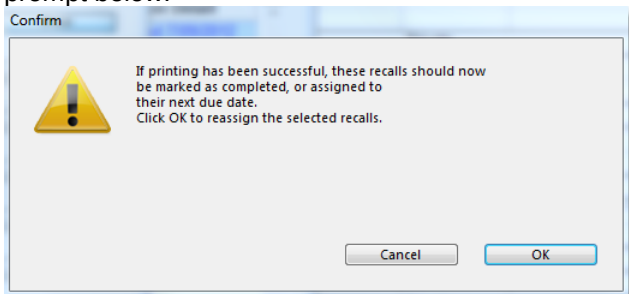
- Bad Debt
- Envelope
- Next appt
- Quote
- Recall Letter**
- Summary

Print
Add Template
Duplicate
Add Category
Delete Item
Expand All
Collapse All
Close
Open

This will open the selected template. Use the **Printer** button at the top right of the window to print a letter for all the patients who were previously selected.

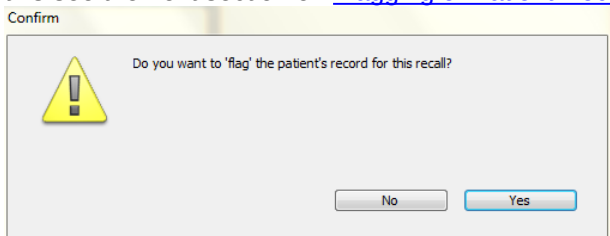


Once printing has been completed, you will be asked if you would like to re-assign the recalls to their next due date. If you click **OK**, then the non-recurring recalls will be marked as Completed. They are not actually deleted. Recurring recalls will be set to the next due date. If you don't automatically update the records when asked, you can do this by clicking on the **Reassign Selected** button. After pressing this, you will be presented with the prompt below.

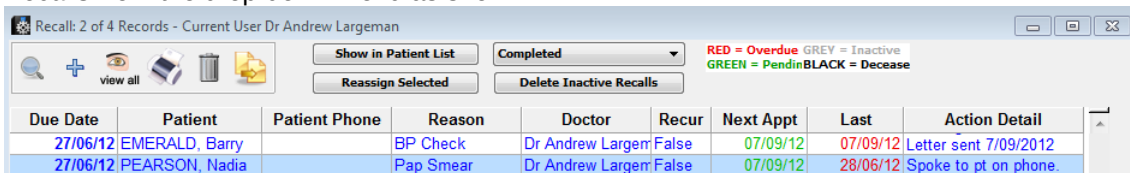


Note: Reassigning recalls results in the current recall being issued a new due date, it does not create a separate record for the new recall.

You will then be prompted as to whether you would like to flag the patients record(s). For more information on this see the next section on [Flagging of Patient Record](#).



You can view all Completed recalls (i.e. printed, non-recurring recalls), at any time by selecting *Completed Recalls* from the drop-down menu as shown.

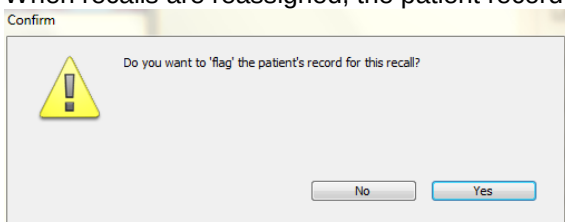


The *Last* field will be marked with today's date (or the date the most recent recall action was taken) and the *Action Details* field will be marked as *Letter Sent* if a merged letter template was used, or *SMS sent* if the SMS option was used. The *Action Detail* column can be edited manually by double-clicking on the recall and typing into the appropriate fields. For example, if you had telephoned a patient and wanted to record this, you could type 'Spoke to pt on phone' and the current date into the *Action Detail* field.

Note: The Recalls Due section in Genie is used as a reminder system only. A recall is considered to be completed in Genie when a reminder action is performed, NOT when the patient comes in for their appointment. This is monitored through Flagging. See [Flagging of Patient Record](#) for more information.

5.18.3 Flagging of Patient Record

When recalls are reassigned, the patient record can get flagged if you accept the prompt to do so.

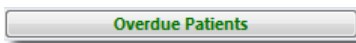


If the recall is currently overdue, then the Flagged Date is set to one week ahead. Otherwise, the Flagged Date is set to one week after the recall due date.

When a user enters a flagged Clinical Window, they will be notified that it is flagged and for what reason.



After the Flagged date has passed, the user who assigned the recall will see the Overdue Patients notification in the navigation palette.

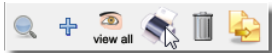


By clicking on this button, the user can view all of their flagged patients. These flags will be displayed regardless of whether they are generated by printing a recall or for another reason.

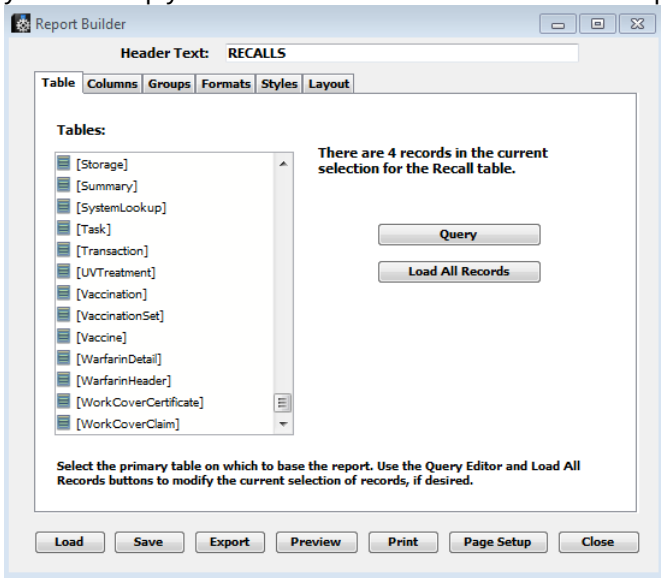
A list of Flagged patients for all providers can be viewed at anytime through **Open > Patients** and then **Patients > Flagged Patients**.

5.18.4 Printing the Recall List

To print the Recalls list, click on the **Printer** button. If you would like to only print a selection of records displayed in Recalls Due, highlight the required records, and go to **Records > Use Selected** from the menus above the Recalls window. This will remove from display any non highlighted records, allowing you to just print the selection.



Clicking the **Printer** button will open a pre-existing Quick Report template allowing you to print all the details contained in Recalls Due (e.g. Due Date, Patient, Pt Phone, Reason, etc). If you do not want to make any edits, you can simply click on the **Print** button and the list will print.

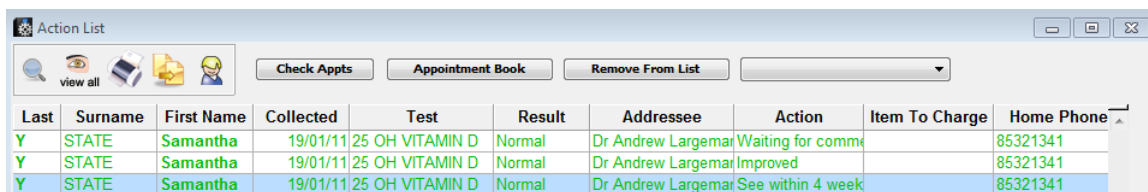


5.18.5 Pathology/Radiology Recalls (Investigation Action List)

The Investigation Action List allows the receptionist or practice nurse to deal with results as requested by the reviewing doctor.

This would normally be done once or twice per day. As each result is dealt with, it should be removed from the list. As new results are reviewed by the doctor, they are added to the list, so this list is constantly 'rolling over' each day.

To open the Investigation Action List (as shown below), select **Open > Investigations Action List**.



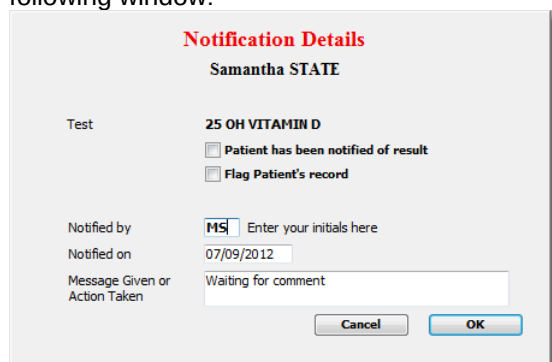
Last	Surname	First Name	Collected	Test	Result	Addressee	Action	Item To Charge	Home Phone
Y	STATE	Samantha	19/01/11	25 OH VITAMIN D	Normal	Dr Andrew Largemar	Waiting for comment		85321341
Y	STATE	Samantha	19/01/11	25 OH VITAMIN D	Normal	Dr Andrew Largemar	Improved		85321341
Y	STATE	Samantha	19/01/11	25 OH VITAMIN D	Normal	Dr Andrew Largemar	See within 4 weeks		85321341

The Action to be taken is noted in the Action column. If the action to be taken is marked as *Recall*, it will be marked in red. All other actions are marked in green, or in black if *No Action* is required.

In the above example, the patient is to be recalled. The home phone number is listed, so you would normally call the patient and make an appointment for them. You can open the patients demographics using the **Edit Patient** button  if you need any other information such as phone numbers.

To check whether the patient already has an appointment booked, click the **Check Appts** button. If no appointments are found, you can click on the **Appointment Book** button to open the Appointment Book.

Once you have made the appointment, click on the **Remove From List** button. Clicking this will result in the following window:



Notification Details
Samantha STATE

Test: 25 OH VITAMIN D

☐ Patient has been notified of result
☐ Flag Patient's record

Notified by: MS Enter your initials here
 Notified on: 07/09/2012
 Message Given or Action Taken: Waiting for comment

Before you can click **OK** you must have entered at least your initials.

The information entered into this window is saved with the result, so that you can look back at a later date and see who spoke with the patient and what was done.

Select the *Patient has been notified of result* tickbox if you have actually spoken with the patient.

Because this is a recall, you will probably want to select the *Flag Patient's Record* tickbox if the reviewing doctor has not already done so. Enter the date after which you would like Genie to warn you if the patient's record remains flagged.

In the *Message Given or Action Taken* field enter what you have either done or told the patient.

Click **OK** to remove this result from the list.

Note: You can select multiple results at once by highlighting them with Shift+click, or simply selecting all results. You can then move through the above window quickly without having to click on the 'Remove From List button', or enter your initials for each result.

Instead of, or as well as, phoning the patient, you can use the **Merged Letter Template** button  to send one or many of the patients in the list a letter or email.

You can view the actual result by double-clicking on it in the list, assuming you have clinical privileges in the **Security** tab of your User Preferences.

5.19 Scanning

Genie can handle scanning in several ways. It can:

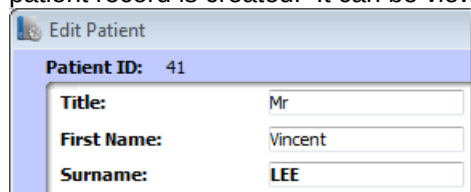
1. Scan directly to a patient's file using ImagePro (see [Scanning Within Genie](#)),
2. Batch process multiple images that were scanned and stored in a holding folder outside of Genie (see [Batch Processing](#)),
3. Attach images scanned outside of Genie to individual patient files (see Attachments in the online Genie manual). This is designed for practices that do minimal scanning.

The Folder Hierarchy

Genie does not store attached files in the data file. These attached files are stored in an Images folder and a reference to this location is stored in the data file so that the files can be opened and viewed at any time. By default, the Images folder is located in the Genie folder on the server computer. If you choose to have the Images folder in a different location, it will need to be specified in the **Images & Attachments** tab of Practice Preferences window (**File > Practice Preferences**).

If you are using Genie single user, Genie treats your computer as the 'server' and creates the Image folder in the same way as a network. If you decided to upgrade to a network, you would need to copy the Images folder into the Genie folder on the server and change the pathway stored in your Practice Preferences.

As Genie stores the files in a folder, it is necessary to build a folder hierarchy (i.e. folders within folders). Genie builds this folder hierarchy automatically and creates new folders when required. Folders labelled 'A' to 'Z' will be created directly inside the Images folder. Inside these folders, each patient with attached files will have their own folder. The naming convention of these folders is their Surname, followed by their first name initial and their Patient ID number. The Patient ID number is a unique number that is automatically generated whenever a new patient record is created. It can be viewed in the top left corner of patient's Demographics window



Note: The Patient ID number should not be confused with the patient's Chart Number as the chart number is not a unique number.

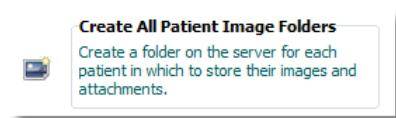
In the screenshot above, the folder containing Vincent Lee's images would be named 'LeeV41' and would be found at the following location on the server:

Windows: C:\Genie\Images\L\LeeV41\

Mac: :Applications:Genie:Images:L:LeeV41

Any files that are placed in this folder can be opened from Vincent Lee's clinical record on any client computer. New files which are added to a patient record from a client machine are automatically copied to the patient's folder on the server.

If a folder for the patient does not already exist, you can click the **Create All Patient Image Folders** button in **General** tab of the Maintenance & Reports window (**File > Maintenance and Reports**) to automatically create a subfolder for every patient in your database.



5.19.1 ImagePro

ImagePro is an optional module for image-handling within Genie. It allows scans, photographs and videos to be directly acquired and linked to a selected patient. It also allows subsequent manipulation of images.

If you would like to register to use ImagePro, please contact the Genie Sales team on (07) 3870 4085 or 1300 889 362.

5.19.1.1 Configuring ImagePro

Requirements

In order to use ImagePro:

1. You must be registered to use ImagePro.
2. Have QuickTime v7.7.3 or higher installed on each client computer. The Windows installer for QuickTime v7.7.3 can be found at [this link](#).

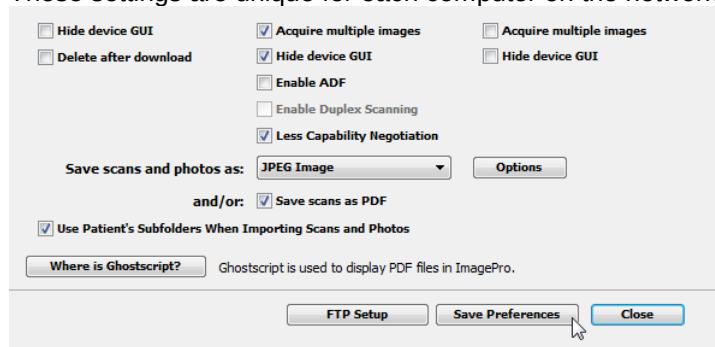
Update Registration

Once you have registered to use ImagePro, update your registration details in Genie by doing the following:

1. Select **Special > Update Genie Registration**.
2. Make sure the *ImagePro* checkbox is ticked.
3. Click the **Register** button.

ImagePro Preferences

The bottom part of the ImagePro Control window (**Special > ImagePro Control**) contains your preferences. These settings are unique for each computer on the network.



Acquire multiple images allows Genie to process multi-page documents.

Hide Device GUI will hide the scanner's user interface window when scanning a document. If this option is ticked, the *Enable ADF* and *Enable Duplex Scanning* options will become available.

Enable ADF will use the auto document feeder on your scanner if it has this option.

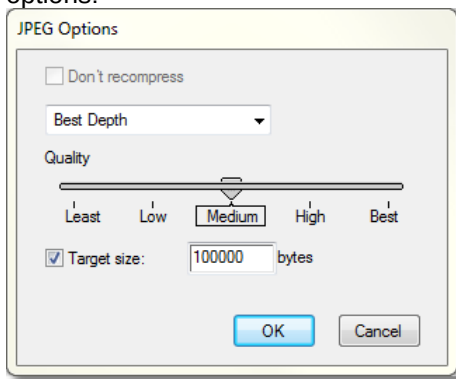
Enable Duplex scanning will scan documents that have been printed on both sides.

Less Capability Negotiation simplifies the language Genie and the scanner use to communicate with each other.

Save scans and photos as allows you to select the default format that scans are saved as in Genie. Generally, JPEG is the best format for colour scans and photos.

Use In-Process Acquisition alters the way Genie interacts with ExactScan when ticked. This tickbox only appears when using Genie on a Mac computer.

The **Option** button allows you to set the quality of the images being scanned. Below is an example of the JPEG options:

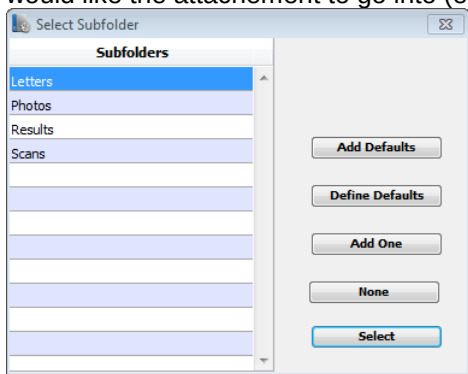


The easiest way to set the quality is to specify the maximum file size in the *Target Size* field. It is recommended that images stay at 100 Kilobytes or less as larger, higher quality images will be slower to copy back and forth over a network.

Note: the Target Size is measured in Bytes. There are 1000 Bytes in 1 Kilobyte. Therefore 100 Kilobytes would be 100,000 Bytes.

The *Save scans as PDF* checkbox allows you to save scans as PDF documents. If this option is ticked, it will override what is selected in the *Save scans and photos as* drop-down menu and will save all files as PDF documents.

If the *Use Patient's Subfolders When Importing Scans and Photos* option is selected, the window below will appear when scanning or adding an attachment, allowing you to select which of the patient's sub folders you would like the attachment to go into (e.g. Op Photos, Referrals etc.):



The **Add Defaults** button will add the default folders you have listed to this patient's image folder.

The **Define Defaults** button allows you to set default folders that can be added to any patient's image folder.

The **Add One** button allows you to add a new folder to this specific patient's image folder.

The **None** button will not add the images to any of the sub folders. It will add it directly in the patient's image folder.

The **Select** button will add the image to the highlighted folder.

For more information on adding sub folders, please refer to [Viewing Images](#).

If you make any changes to the preferences, you must click the **Save Preference** button for the changes to take effect.

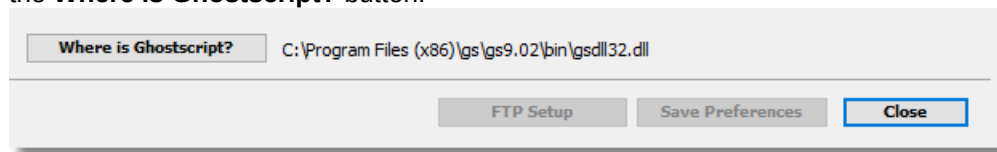
Ghostscript

The **Where is Ghostscript?** button allows you to link your installed copy of Ghostscript to Genie. Ghostscript is a free, third party software that allows PDF documents to be displayed. This is only required on Windows computers as the displaying of PDF documents is handled internally on Macintosh computers.

If there is a file path to the right of the **Where is Ghostscript?** button, this indicates that Ghostscript has been linked to Genie. If a message appears to the right of this button stating that "Ghostscript is used to display PDF files in ImagePro", then Ghostscript has not been linked to Genie and possibly not installed.

If you have not installed Ghostscript, you will need to download and install a suitable version of it from the [Ghostscript website](#). Download the installer via the "Ghoscript" link on the page, then run it and allow Ghostscript to install in the default location (i.e. **C:\Program Files (x86)\gs**).

Once Ghostscript has been installed, link it in Genie by opening the ImagePro Control window and clicking on the **Where is Ghostscript?** button.

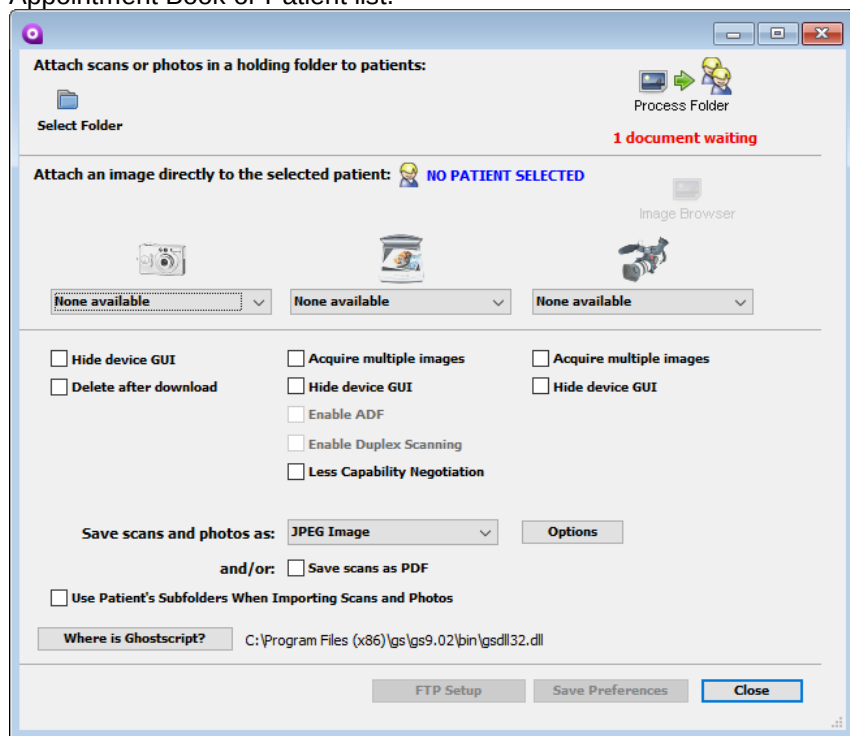


If you have installed Ghostscript in the default location, navigate to **C:\Program Files (x86)\gs\gsX.XX\bin** (where 'X.XX' represents the Ghostscript version number), select the gsdll32.dll file and click **Open**. This process will require Genie to be restarted so that Ghostscript can be linked. After being restarted, you will now be able to preview PDFs within Genie.

Note: Ghostscript must be installed and linked in Genie on each Windows client computer in order to view PDFs.

5.19.1.2 Using ImagePro

The ImagePro Control window can be accessed by selecting **Special > ImagePro Control** in either the Appointment Book or Patient list.



5.19.1.2.1 Scanning Within Genie

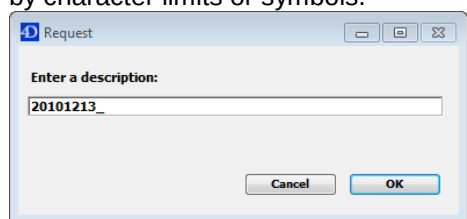
Scanning within Genie allows you to scan and link a document automatically to a specific patient. This is useful if you do not do a lot of scanning at your practice or you want to scan a single document, such as a referral letter from a new patient.

You can scan in Genie using the following methods:

1. Right-click on a patient from either the Appointment Book or Patient List and select *Scanner*. Genie will scan straight to the patient's file using the default settings in the ImagePro Control window (See [ImagePro Setup](#)).
2. Select a patient from either the Appointment Book or Patient List, go to **Special > ImagePro Control** and click on the **Scanner** button.
3. Go to **Special > Image Pro Control**, click on the **Select Patient** button, search for and select the relevant patient, then click the **Scanner** button.

If you have the *Hide Device GUI* option ticked in the ImagePro Control window, the document will scan automatically. If this option is not ticked, the scanner's own user interface window will appear where you can select different options that relate to your scanner (e.g. image colour, size).

Once scanning has completed, you will be asked to enter a description for the scan. This is a unique description for the image and does not affect the naming of the file stored on the server. This means it is not constrained by character limits or symbols.



Genie converts the scan to the image format and size which you have specified in the ImagePro preferences and then copies the resulting file to the patient's image folder on the server.

5.19.1.2.2 Batch Processing

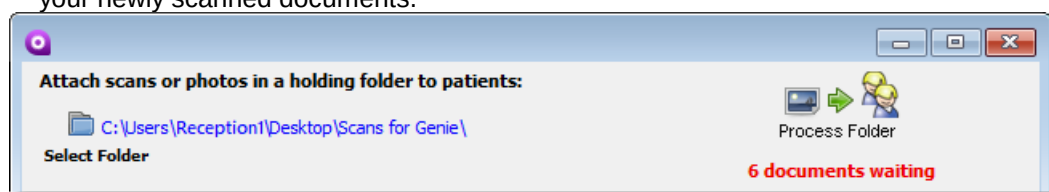
If you have multiple documents for multiple patients to scan, the procedure outlined below is highly recommended and will yield considerable time savings.

Note: While this section has been written with scanning in mind, the procedure applies for other types of documents such as photos, electronic faxes, PDFs etc.

Configuration

Note: Each client machine that will be scanning or processing (uploading) documents needs to complete these configuration steps:

1. Create a holding folder called something like 'Scanning' on a client machine. This can be anywhere on your hard drive, the Desktop is usually convenient.
2. Set up your Scanner's Software to scan to this holding folder.
3. In Genie, open Image Pro Control by going into **Special > ImagePro Control**.
4. Click on the **Blue folder** button  in ImagePro Control, and select your holding folder. This directs Genie to your newly scanned documents.

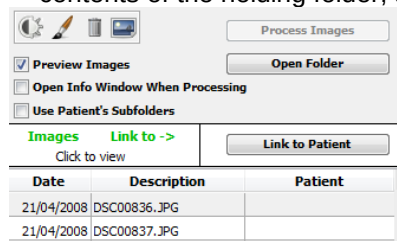


You can then scan your documents into the holding folder using your scanner's software outside Genie. Black and white JPEG, PNG or TIFF, with a resolution of about 150 dpi are usually best at keeping your image size below the desired 100KB.

Importing Scans

Once a bundle of documents have been scanned to the holding folder, the next step is importing them into Genie so they can be accessed in the Clinical Window. You can import these into Genie as follows:

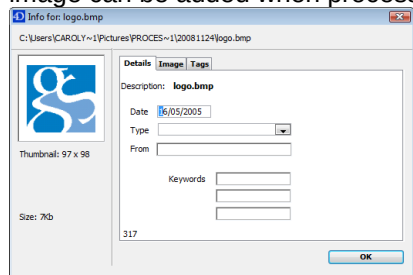
1. Click on the **Process Folder** button in the top right of the ImagePro Control window. This displays the contents of the holding folder, as shown below:



The buttons at the top of this window allow you to **apply filters** to , **draw** and **annotate** on images , **delete** , and **open** the Image Browser  for the highlighted patient image.

Preview Images needs to be ticked if you would like to be able to preview the images in the preview pane on the right.

Open Info Window When Processing will open the below info window for all images so further detail about the image can be added when processing.

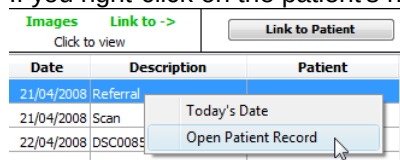


Use Patients Subfolders allows you to select which of the patients subfolders you would like an image to go into when processing the images. eg. Op Photos, Referrals etc. These are added through the patient's Image Browser.

For more information on adding subfolders refer to [Viewing Images in the Clinical Module](#).

1. To view an image, click once on the name of the scan. You can zoom in on a scan simply by clicking on the displayed image, and zoom out by **Shift-clicking**. If the image will not display in the display area, simply double-click on the description of the image and it will open the image in a separate window.
2. To change the date of the image, (e.g. to the date of the referral letter) slow double-click in the Date column. You can right-click to change the date to today's date for one image or all images in the list.
3. To rename the image, slow double-click in the Description column. The name of an image is for display purposes only in Genie, it does not change the original name of the file on the Server. For this reason, images can be named using any type or amount of characters, and the same image name can be used for more than one patient.
4. To attach a single image to a patient, double-click in the Patient column next to the image name. If you have multiple images you need attach to the same patient, you can highlight the images using **Ctrl+click** or **Shift+click**, then click on the **Link to Patient** button.
5. You will be presented with a Search window to allow you to specify the patient to whom the image(s) belongs. If you link an image to the wrong patient, you can unlink it by double-clicking on its name and choosing 'unlink' when prompted. This will allow you to then link this image to the correct patient.

If you right-click on the patient's name you can open their Clinical Window for reference.



6. Once you have linked the image to a patient, you can also mark it to be reviewed by a particular provider (this is optional). To do this, right-click in the *To be Reviewed By* column to assign a reviewer.

Date	Description	Patient	To Be Reviewed By
14/07/2009	Chrysanthemum.jpg	Samantha STATE	
14/07/2009	Desert.jpg	Bryan ADAMS	
14/07/2009	Hydrangeas.jpg	Anna LEE	
14/07/2009	Jellyfish.jpg	Barry EMERALD	
14/07/2009	Koala.jpg	Bryan ADAMS	
14/07/2009	Lighthouse.jpg	Glenda MARCH	
14/07/2009	Penguins.jpg	Andrew STATE	
14/07/2009	Tulips.jpg	Ella BROWN	

7. Once you have finished assigning the scanned documents to the relevant patients, click on the **Process x Images** button. Genie will process each image, copying it to the appropriate patient folder on the server.

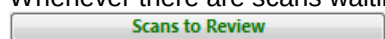
As the scanned documents are processed, Genie moves the original file into a folder called 'Processed', which is automatically created within the holding folder. These can then be deleted manually if you wish.

If you selected a provider to review the scan, Genie will create an entry in the Scans for Review section (**Open > Scans for Review**).

Date	Name	Patient	Redirect To	Reviewed
15/02/2013	Chrysanthemum.jpg	Samantha STATE	Dr Andrew Largeman	☐
14/07/2009	Jellyfish.jpg	Bryan ADAMS	Dr Andrew Largeman	☐
14/07/2009	Koala.jpg	Barry EMERALD	Dr Andrew Largeman	☐

Providers can then tick *Reviewed* simply by highlighting each scan to preview its contents. or right-click in the *Redirect To* column to redirect to another provider. Providers with clinical access (**File > Edit Groups**) can use the drop-down menu at the top of the window to view scans for review by other users, however users may only mark their own scans as *Reviewed*.

Whenever there are scans waiting, you will see Scans to Review as an entry in the navigation palette.



5.20 Tasks

Tasks are a way of communicating internally either as a way of recording phone messages or as a reminder for yourself or other users.

Tasks are accessed through **Open > Tasks** or via the **Tasks** button in the navigation palette.

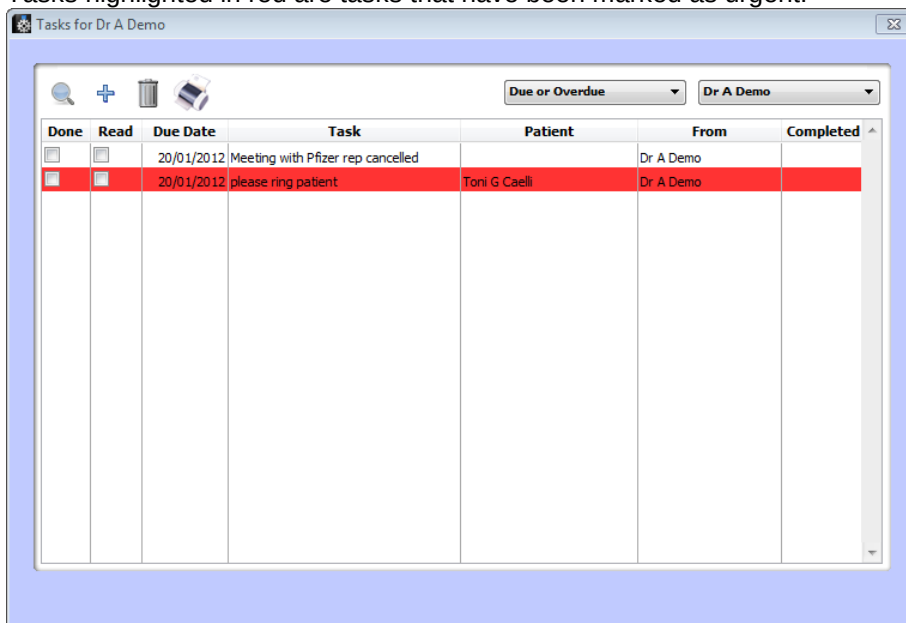
You will receive your tasks in the navigation palette as either green for non-urgent tasks or red for urgent.



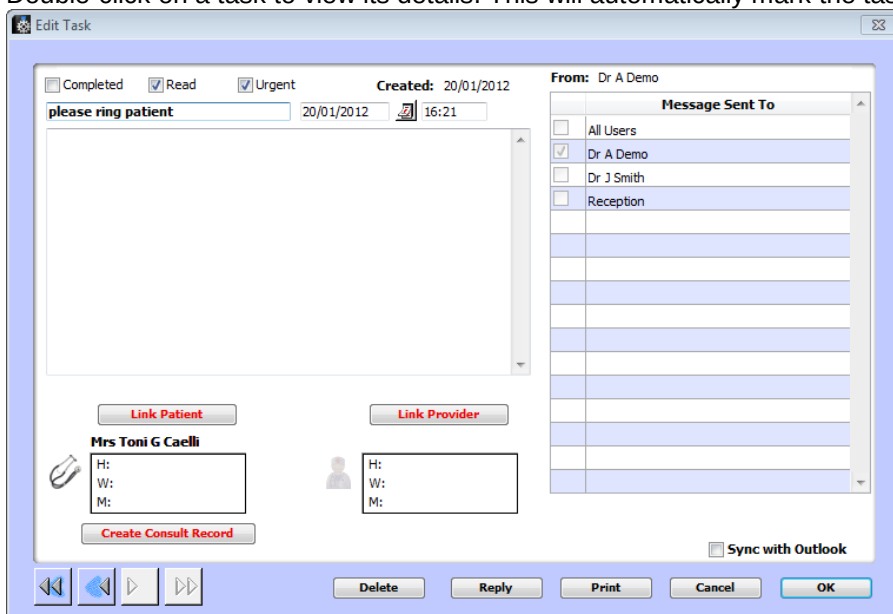
The tasks will appear in the navigation palette when you receive a new task and will remain until you have read all your tasks.

When the Tasks window is opened, the tasks listed are the tasks that are yet to be completed. The type of tasks displayed can be changed using the drop-down menu at top right. You can view or modify other users' tasks if your security preferences Edit Groups allow you to do so. See the [Edit Groups](#) section for more information.

Tasks highlighted in red are tasks that have been marked as urgent.



Double-click on a task to view its details. This will automatically mark the task as *Read*.

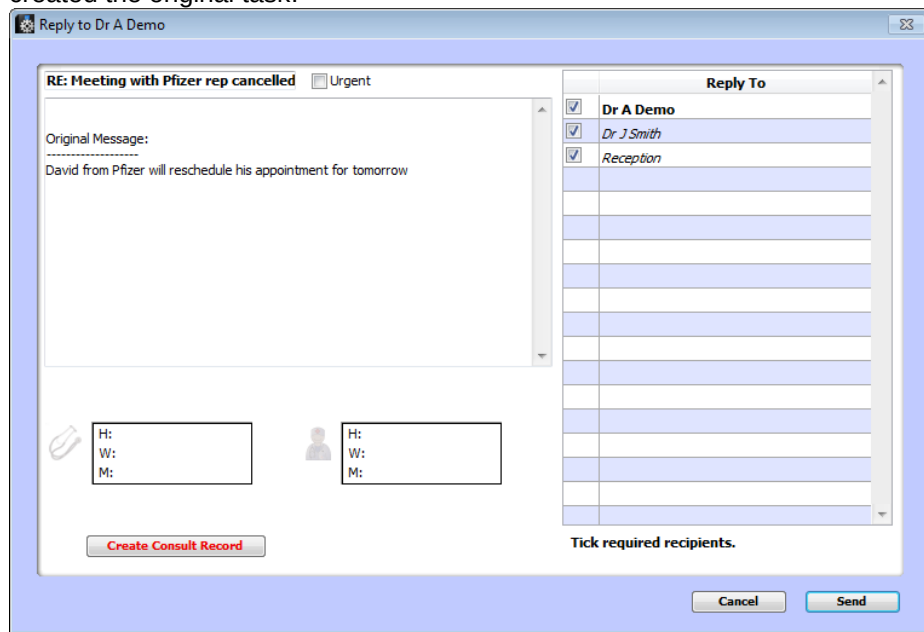


If the task is linked to a patient, the patient's Clinical Window can be opened by clicking on the **Stethoscope**

button . If the task is linked to an Address Book entry, the Address Book details can be viewed by clicking on the **Doctor** button .

To reply to the task, click on the **Reply** button. This will open up another task window with the body of the original task copied into it.

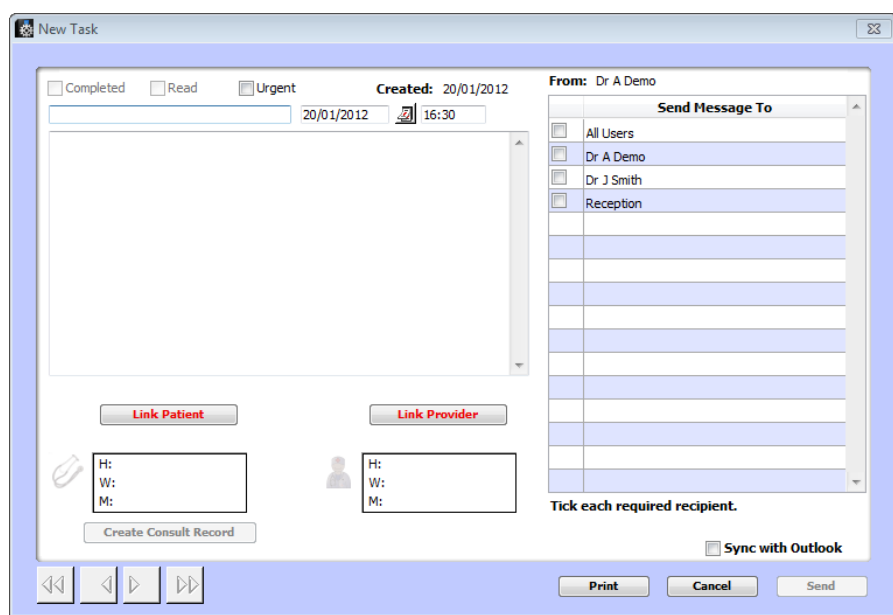
In the *Reply To* column, names in italics were sent the original task and the name in bold was the user who created the original task.



If the task is complete, tick the *Completed* box and save using the **OK** button.

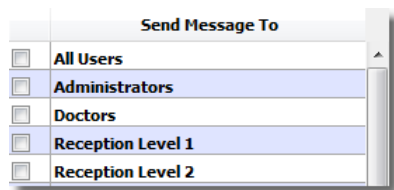
To send a task, click on the **Blue plus** button , type a subject in the subject line, and the detail of the message in the large blank text area. Ticking the *Urgent* box will mark the task as urgent, and the task will be displayed in red. You are then able to enter the date that you or the recipient need to be notified.

Mark who you would like the message to go to by ticking the box next to their name in the '*Send Message To*' column on the right.



Note: You can select your own name so the task acts as a reminder, if needed.

If you are using Genie version 8.5.7 or higher, you will also be able to send tasks to groups of users. This feature will be available for all groups with *Send Tasks* and *Receive Tasks* ticked.



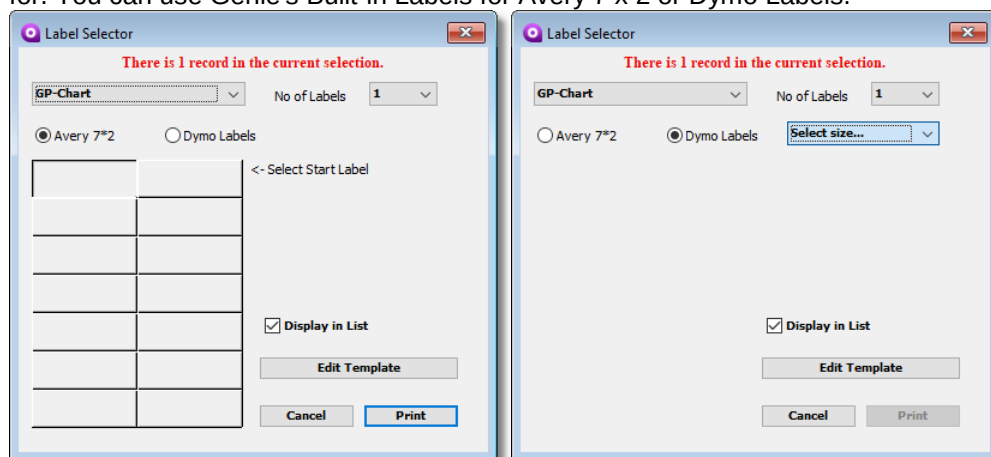
For more information on using groups functionality in Genie, please see the [Edit Groups](#) section.

You can also link the task to a patient by either creating the task while in their Clinical Window (though **Tools > Add Task**), or clicking on the **Link Patient** button. This will keep a record of the task in the Tasks section of the **Other** tab in the Clinical Window. Similarly, the task can be linked to a person in the Address Book using the **Link Provider** button.

5.21 Labels

Labels can be printed from many windows within Genie; these include the Appointment Book, Patient List, Account Holder List, Address Book and Patient Demographics. To print a label, press the **Label** button  in one of these windows.

Clicking on the Label button with a patient selected in one of the above windows will cause a drop-down menu to appear. This menu will have the option *Built-in Labels* and any other templates you have ticked *Display in List* for. You can use Genie's Built-in Labels for Avery 7 x 2 or Dymo Labels.



Select the best suited label from the drop-down list at the top of this window, and select the relevant radio button out of *Avery 7 x 2* or *Dymo Labels*. If you are using Dymo labels, ensure you have your Dymo printer selected for the Labels entry in your Printing Preferences (**File > Printing Preferences**).

You are able to print up to 14 labels at a time by using the *No of Labels* drop-down menu. If you are using Avery labels, select your starting label by indenting it on the table in left. If you are using Dymo labels, select the correct size from the *Select size..* drop-down menu.

If you find that your labels are printing outside of the margins, use the **Edit Template** button to adjust them accordingly. If you would like to adjust the entire label template, click and drag the mouse over the whole label template to highlight it, releasing the mouse once you have covered the template. The invisible references will now be visible. You can nudge all fields left, right, up and down by pressing the arrow keys on your keyboard. You can save these changes by clicking the **Disk** button and closing out of this Edit Template window.

Once you have configured your labels, click on the **Print** button.

Display in List will add the selected label to the label drop-down menu so that this window can be bypassed in future. You will not be able to select starting label or number of labels if you print directly from the label icon.

Part



VI

Clinical

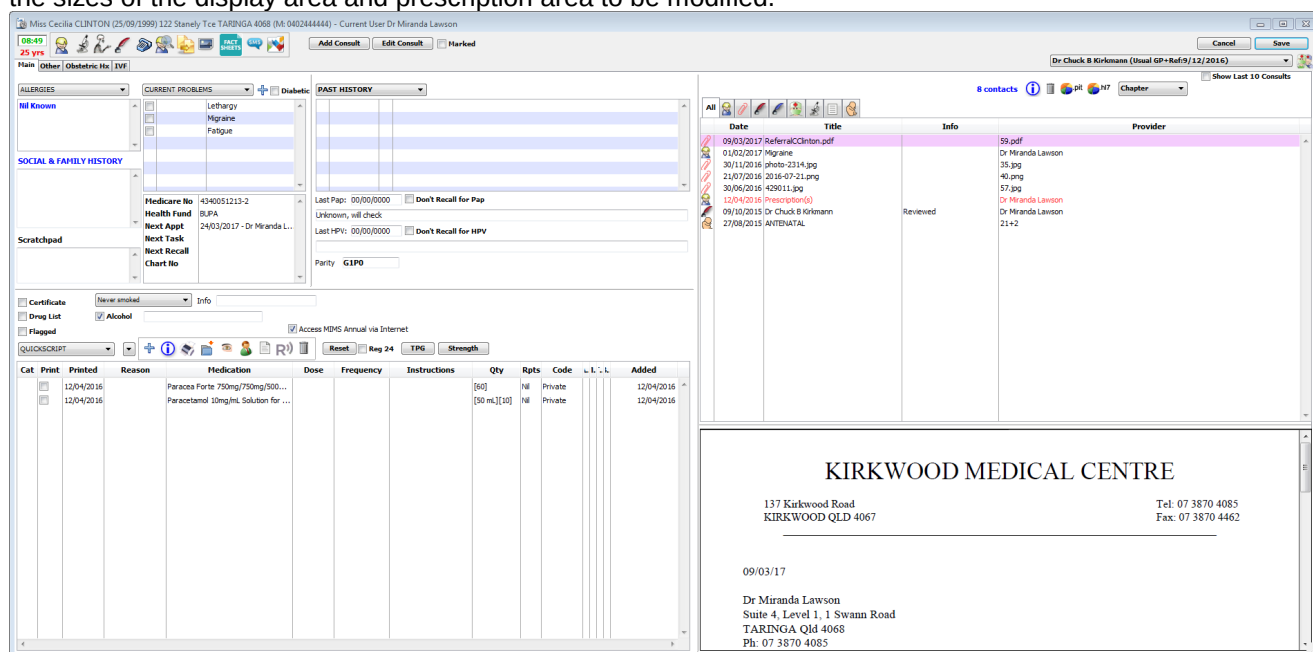
6 Clinical

The Clinical window can be opened from either the Appointment Book or the Patients List. To open from the Appointment Book, click once on the appointment to highlight it, and then click on the **Stethoscope** button  or press **Ctrl+K**.

To open from the Patients List, double-click on the record or press **Enter** on your keyboard with the patient name highlighted.

The Clinical Window has up to five different pages, depending on your practice type and screen resolution.

There are two layouts for the Clinical Window. If your computer and monitor support a screen resolution of 1280x754 or higher, you can tick the *Use Large Clinical Window* in **File > User Preferences**. This is a much more useful window, because all the major information is displayed on the one page. It is highly recommended that you increase your screen resolution to take advantage of this feature. Additionally, on large screens/high resolutions, the Clinical Window will open to the full window width, and includes a vertical splitter which allows the sizes of the display area and prescription area to be modified.



The screenshot displays the Genie Clinical Window for patient Miss Cecilia CLINTON (25/09/1959). The window is divided into several sections:

- Header:** Patient name, date of birth, and current user (Dr Miranda Lawson).
- Left Panel:** Contains tabs for Allergies (Nil Known), Social & Family History, and a Scratchpad. It also shows Medicare details and a list of medications.
- Current Problems:** Lists Lethargy, Migraine, and Fatigue.
- Past History:** Includes Last Pap, Unknown, will check, and Last HPV.
- Medications:** A table listing Paracetamol and Paracetamol Forte with their respective doses and frequencies.
- Right Panel:** A list of consultations with columns for Date, Title, Info, and Provider. It shows a referral from Dr Miranda Lawson on 09/03/2017.
- Bottom Panel:** Contact information for KIRKWOOD MEDICAL CENTRE, including address, phone, and fax numbers.

Button Description



The **Edit Patient** button opens the patient's Demographic details.



The **Pathology Request** button opens the Pathology request window. See [Ordering Pathology](#).



The **Radiology Request** (skeleton) button opens the Radiology request window. See [Ordering Radiology](#).



The **Referral/Reply** button opens a Referral/Reply letter. See [Referral/Reply Letters](#).



The **Recall** button opens the Recall window. See [Recalls](#).



The **Open Another Patient** button allows you to open another patient's Clinical Window. This button should only be used in situations where you would like to quickly refer to another patient's file whilst in consultation i.e. interrupted with a phone call regarding another patient. This is advised to avoid confusion, or even addition of details to the incorrect patient's file. **Alt+clicking** on this button will display a list of patients with the same Medicare number.



The **Merge Letter Template** button displays a list of available templates. This can be used for documents such as Medical Certificates, or Immunisation History. For set up of these templates, see [Merged Letter Templates](#).



The **Image Browser** button opens up either the Attachments or the Image Browser window, depending on whether ImagePro is registered. See Attachments, or [Images](#).

The **Add Consult/Edit Consult** buttons open a new consult window or edits your current consultation. See [Consultation Notes](#).



The **Fact Sheets** button will open an internet browser window to the Healthcare Fact Sheets websites. From here, you can log into Healthshare and access fact sheets which you can provide to your patients. You can also access the **Fact Sheets** button in the Prescribing window and the Consult window. In addition, a *Healthshare Fact Sheet* option will appear when you right-click on an item in either Current Problems, Past History or Prescription areas.



The **SMS** icon allows you to send an SMS to the patient or their referring doctor, and view the patient's SMS history. For more information, see the [SMS Reminders](#) section under The Reception Module.



The **My Health Record** icon is used to open a patient's My Health Record, and changes colour to indicate whether you have been granted access. For more information, see the My Health Record section of the online manual.

6.1 The Main Page

The Main (or Summary plus Notes) page displays the patient's Current Problems, Past History, Current Medication List, Allergies, Smoking and Alcohol history, Pap smear details and flag information.

The screenshot displays the Genie Main Page for patient Miss Cecilia CLINTON (25/09/1999). The page is divided into several sections:

- ALLERGIES:** Nil Known.
- CURRENT PROBLEMS:** Lethargy, Migraine, Fatigue.
- PAST HISTORY:** Last Pap: 00/00/0000, Unknown, will check. Don't Recall for Pap, Don't Recall for HPV.
- MEDICATION:** Paracetamol 10mg/5ml Solution for ...
- CONSULTATIONS:** A list of consultations with a flashing red arrow above it.
- CONTACTS:** A list of contacts with a flashing red arrow above it.
- QUICKSCRIPT:** A section for quick script entry.
- Bottom Right:** KIRKWOOD MEDICAL CENTRE contact information.

If the patient has unlinked results, (i.e. in [Open > Pathology & Radiology](#)) a flashing red arrow above the contacts list will alert you to this fact. You can then view and link these results via the **X Unlinked Result(s)** button.

If the patient has unlinked letters, (i.e. in [Open > Incoming Letters](#)) a flashing red arrow above the contacts list will alert you to this fact. You can then view and link these letters via the **X Unlinked Letter(s)** button.

The *Allergies* field allows you to record any allergies that the patient may have, both **Drug** and **Non-Drug**. **Drug** allergies will appear in the field in **red** text, and **Non-Drug** allergies will appear in **blue**. Clicking the drop-down menu above the field and selecting **Add...** will allow you to search for a drug. When you select a drug, Genie will ask you whether you wish to add the drug to the Patient, or to the Choice List for quick selection in future. Non-drug allergies can be added by typing them in full into the search bar when clicking **Add...**, or by selecting **Non-drug allergy** from the drop-down menu.

Note: For sites not using MIMS, user-added drugs are added to the Allergies field as non-drug allergies. This means that Genie will not produce a warning for a user-added drugs when prescribing, even if the patient is marked as allergic to that drug.

The *Social & Family History* field is a free text field in which you can enter any further information about the patient's life that may affect their health or treatment.

The *Scratchpad* displays free text in red font only and is useful for information such as the patient's physiotherapist or other information that is pertinent to their care.

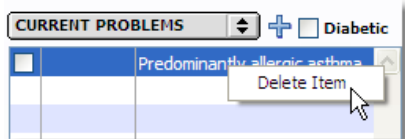
The Medicare No, Health Fund, Next Appt, Next Task, Next Recall and Chart No area displays relevant information for these fields. Double-clicking on the *Next Appt*, *Next Task* and *Next Recall* fields will take you to the relevant area in Genie (e.g. double-clicking on **Next Appt** opens the future appointments window).

Adding/Deleting Current Problems/Past History

A Current Problem or Past History item can be added by clicking on the respective menu and selecting either:
a). 'Add to Menu', which will be used for common problems that are likely to be used for other patients, OR
b). 'New', which adds the problem only to that patient.

The small **Blue Plus** button next to Current Problems also allows you to add a New problem to the current patient.

To delete Current Problems/Past History items from the patients record, double-click on the problem and use the **Delete** button or right-clicking on a Current Problem, Past History or Allergies entry will display a shortcut popup window



To delete problems from the list of Current Problems/Past History, select the relevant drop-down menu, hold down the ALT key and highlight the item to delete. Let go of your mouse, and let go of the ALT key.

Drag and Drop Features

The Current Problem and Past History list can be:

1. Sorted by simply dragging and dropping each record into the position in which you would like it to permanently appear.
2. Dragged and dropped between each other, to convert a Current Problem into a Past History for example.
3. Dragged onto a prescription to set the reason for that medication.
4. Dragged onto a consultation record to set the Primary Presenting Problem. If there is already a primary presenting problem, this becomes a secondary presenting problem.

Pap Smears and HPV Testing

The *Last Pap* and *Last HPV* fields can be filled in automatically if you download electronic results. Alternatively, they can be filled in manually to stop warnings for overdue smears/tests appearing, and to mark the patient on the Overdue Smears and Overdue HPV Testing lists (**Patients > Overdue Smears/Overdue HPV Testing**). If the patient is not a regular of the practice, or no longer is required to be recalled for smears or HPV testing, you can tick the *Don't Recall for Pap/HPV* tickboxes. For more information about using the *Overdue Smears* and *Overdue HPV Testing* lists, see [The Patients Menu](#) in the Menus Overview section.

Smoking Status

The smoker status of the patient can be selected from the *Smoker Status* drop-down menu. If you want to remove the smoker status currently selected for the patient, click the *Smoker Status* drop-down menu and select *(Clear)*. Additional information related to their smoking status can be entered in the *Info* field to the left of the drop-down menu.

Flagging

Ticking the *Flagged* tickbox will prompt you for a reason and the number of days the patient needs to be seen by.

When a User enters a flagged patient's file, they will be notified that it is flagged and be provided with the flag reason. After the flagged date has passed, the user to which the flag is assigned will be notified when logging into Genie. Flagged patients can be viewed at any time through **Patients > Flagged Patients**.

Contacts List

The Contacts list contains previous consultation records, Attachments, Correspondence out and in, Procedures, Pathology & Radiology, Documents, Workcover, Health Assessments, Care Plans, Antenatal Visits. For more information see [Using the Contact List](#).

Show Last 10 Consults tickbox will display the last 10 consultations in the display area.



Interested Parties, is a list of people interested in this patients care generally populated by CCing a letter but can be modified by clicking this button.



The **Garbage Can** deletes the highlighted entry in the Contacts List, provided it is a record that is allowed to be deleted. Consultation records and letters are examples of records that cannot usually be easily deleted.



The graph buttons graph results in PIT and HL7 format, respectively. In order to graph PIT results, you must have 'Extract Path Results PIT Format' ticked in User Preferences. To graph HL7 results, see [Track Individual Pathology Results](#), in **File > Maintenance & Reports**.

6.1.1 Using the Contact List

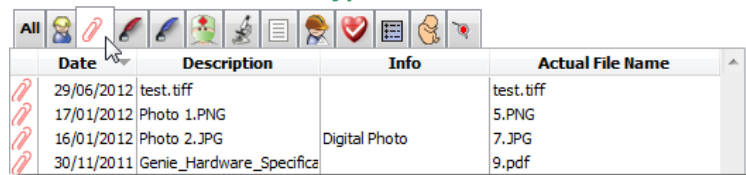
Individual records can be displayed in the display area by clicking on the record in the **Contact List**. For more information on the display area see [Using the Display Area](#).

The up and down arrow keys can be used to navigate from record to record.

The contact list can be sorted by *Date*, *Title* and *Provider* by clicking the appropriate header.

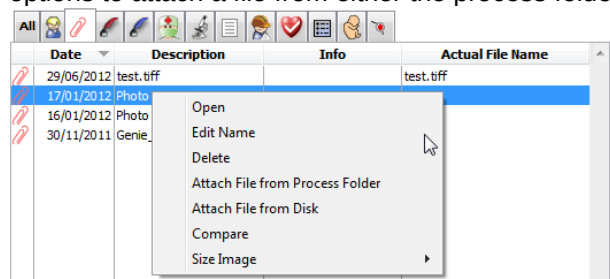
All	Date	Title	Info	Provider
	2/11/2012	Corticectomy		Dr Andrew Largeman
	14/09/2012	[P] Corticectomy		Dr Andrew Largeman
	7/09/2012	Imported Letter	Dr R. J COHEN	
	5/09/2012	Dr R. J COHEN		Dr Andrew Largeman
	4/09/2012			Dr Andrew Largeman
	4/09/2012	Corticectomy	Wesley Hospital	Dr Andrew Largeman
	22/08/2012	Prescription		Dr Gideon J Largeman

The contact list can also be sorted by *Type of contact* by clicking the appropriate tab, i.e. Consults, Attachments, Correspondence In, Correspondence Out, Procedures, Pathology, Documents, Workcover claims, Health Assessments, Care Plans, Antenatal and Tasks. The tabs displayed will depend on what Practice Type you have set in **File > Set Practice Type**.



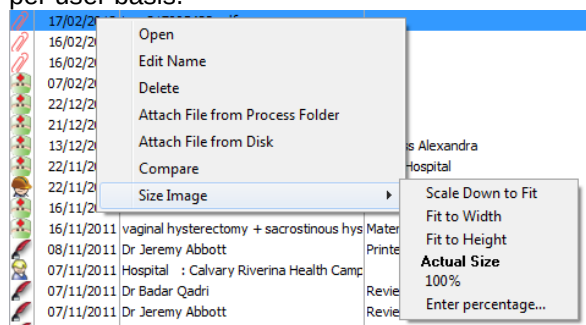
	Date	Description	Info	Actual File Name
	29/06/2012	test.tiff		test.tiff
	17/01/2012	Photo 1.PNG		5.PNG
	16/01/2012	Photo 2.JPG	Digital Photo	7.JPG
	30/11/2011	Genie_Hardware_Specifica		9.pdf

Double clicking on an item in the Contacts list will allow you to edit the entry by opening the appropriate window. Right-clicking on an entry will allow you to open and edit the contact, edit the name or delete. You also get the options to attach a file from either the process folder or from your computer.



If you right-click on an image you will also get the option to *Compare* with another image from this patients list of images. See [Viewing Images](#) in the Images section.

You can adjust the scaling of images displayed in the preview window by right-clicking on an image and choosing from the Size Image menu. This will apply the setting to all images viewed in the preview window on a per user basis.

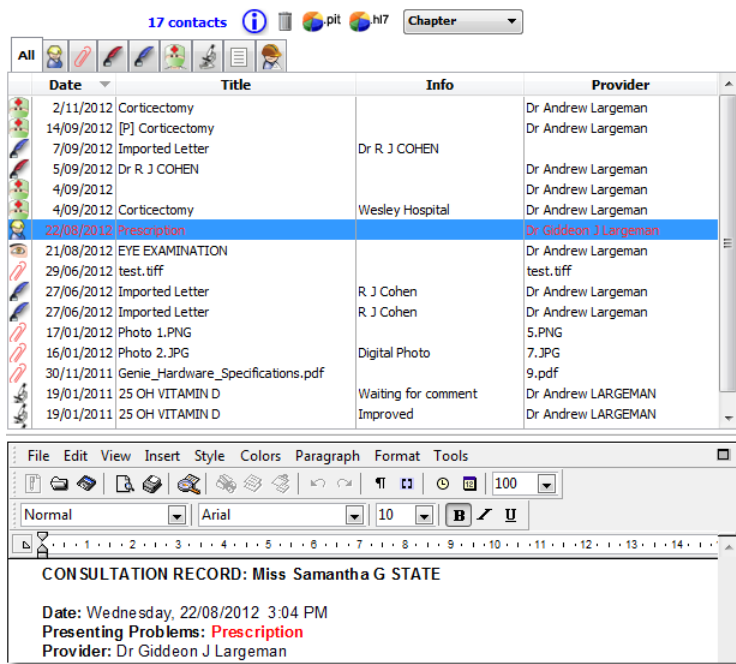


If you hold Alt/Option whilst selecting Open it will open the image in the default image viewing application outside of Genie, otherwise it will open in the Image Browser window.

6.1.2 Using the Display Area

Below the contact list is a display area. Clicking on any records in the Contact List will display that record's contents in the display area.

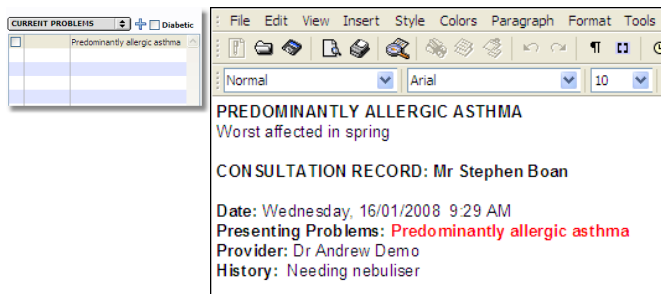
Note: Although you can cut and paste, and even type in the display area, nothing you do here is saved in the actual record, you must double-click on the record in the Contact List in order to make changes that are saved.



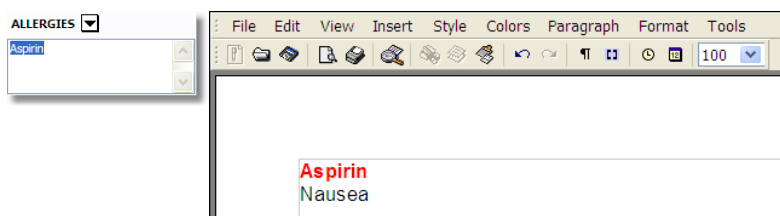
Between the contact list and the display area is a splitter.

Dragging the splitter up or down will adjust the relative sizes of the contact list and display area. You will also find these splitters above prescriptions and vertically between prescriptions and the display area.

Clicking on a Current Problem or Past History item displays the Notes field of the record, as well as all consultation notes in which that problem has been set as one of the Presenting Problems.



Clicking on an allergy will display the reaction as typed in the Details field when adding the allergy.



Clicking on a prescription will display the MIMS Quarterly Information.

QUICKSCRIPT

Reset

Reg 24

TPG

Strength

Script Added

16/01/2008

Rhinocort 64mcg/dose

Cat	Print	Printed	Reason	Medication	Dose	Frequency	Instruc
☐				Panadeine Forte			
☒				Rhinocort 64mcg/dose Nasal spray			

Rhinocort

AstraZeneca Pty Ltd

Budesonide

Consumer Product Information Available: Yes

Permitted in sport

Pregnancy Category: A

Use: Topical glucocorticosteroid. Seasonal, perennial allergic rhinitis prevention, treatment. Treat nasal polyps

Contra-indications: Severe nasal infection esp candidiasis; haemorrhagic diatheses; recurrent

6.2 The Other Page

The **Other** page (or Checklists/Script Archive and Social pages) contains records of scripts printed for the patient, completed checklists, tasks relating to the patient, and any vaccinations the patient has had.

[illegible]

Checklists

Checklists will display all checklists performed on the patient, which saves you having to scroll through consultation notes to find them. You can delete a checklist from the Clinical window by right-clicking on the required checklist, and selecting *Delete Item* from the drop-down menu.

See the [Checklists](#) chapter for more information.

Script Archive

The Script Archive logs all previously printed scripts. The **Info** button will display all changes made to a selected medication. If the same prescription has been printed several times, it will appear several times in the archive. Prescriptions can be removed from this list by clicking the trash can icon , or by performing a Cull Script Archive. For more information on Archiving and Culling, please see the [Archiving](#) section of this manual.

Tasks

This is area displays tasks that have been linked to the current patient. See [Tasks](#) for more information.

Life Events

Life Events is an area where sensitive information about the patient can be added, without typically being on display while the patient is in consultation. This area only appears when the practice type is set to General Practitioner.

Vaccinations

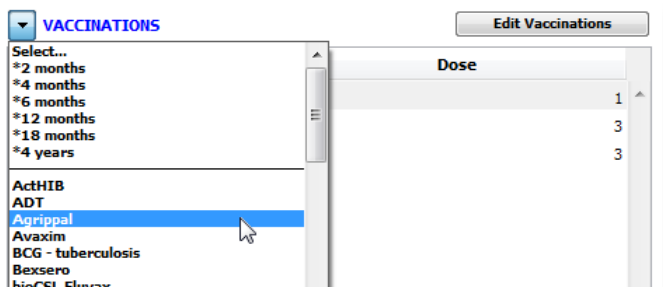
Vaccinations
The Vaccinations area lists all of the patient's vaccinations; this area is visible only if your Practice Type is set to

General Practice, Obs/Gynae, Plastic Surgery, Anaesthetics, or Other Specialty. For more information, see the [Vaccinations](#) section.

6.2.1 Vaccinations

The Vaccinations area will list all vaccines administered to the patient. Detailed information about each vaccination (e.g. *Batch Number, Site Given*, etc.) can be viewed by double-clicking on the vaccination.

To add a vaccine to a patient's record, click on the *Vaccinations* drop-down menu and select the vaccination or vaccination set.

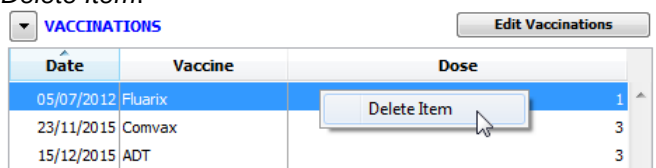


For information on how to create vaccine sets and keep the list of vaccines up-to-date, please see the [Editing Vaccines and Vaccine Sets](#) section. When you select a vaccine or set (sets are denoted by * in the list), the window below will open for the vaccination(s) you are adding.

Ticking *Transmit to AIR* will allow the vaccination to be batched for transmission to AIR. Vaccinations can be batched and transmitted via the AIR Immunisations window, accessible from the **Daily** tab in **File > Maintenance and Reports**. For more information, please see the [Transmitting to AIR](#) section.

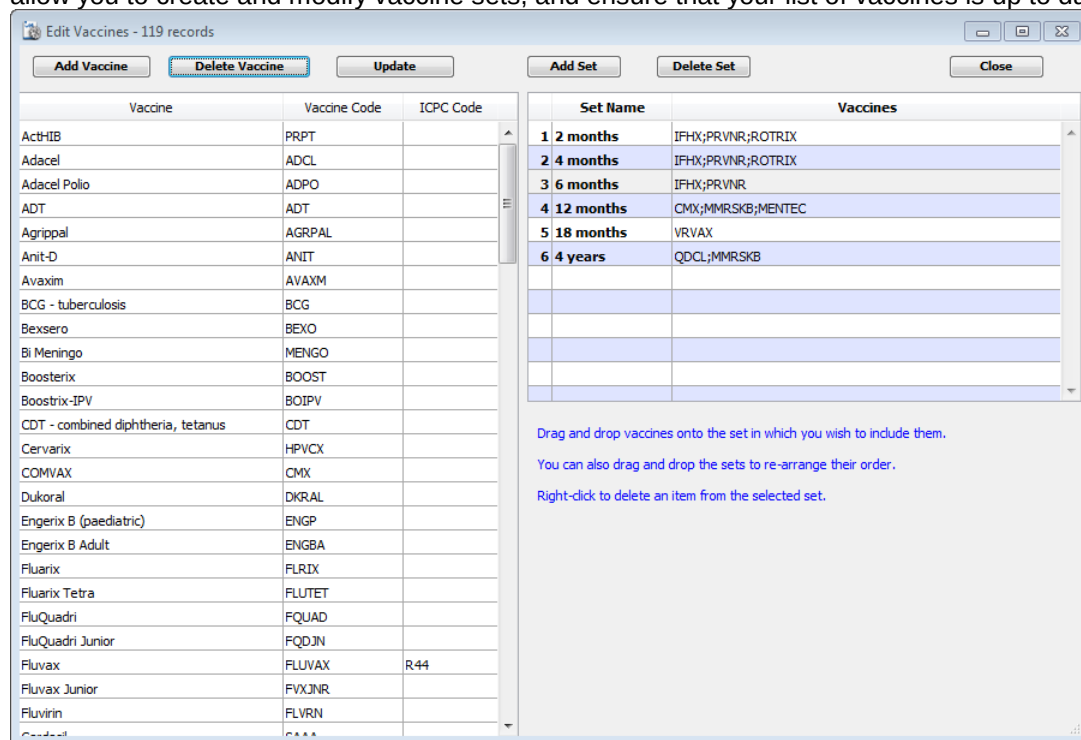
The **Add to Consult Notes** button creates a consult record in the patient's contact list showing that the vaccination was administered.

Once a vaccination has been saved to a patient's record, it can be deleted by right-clicking it and selecting *Delete Item*.



6.2.1.1 Editing Vaccines and Vaccine Sets

Click the **Edit Vaccinations** button in any patient's clinical window to open the Edit Vaccines window. This will allow you to create and modify vaccine sets, and ensure that your list of vaccines is up to date.



Editing Vaccines

If a vaccine you need is not present in the current list, it can be added in two ways. To add the missing vaccine manually, click the **Add Vaccine** button. A window will appear prompting you to enter a *Vaccine Name*, *Vaccine Code*, and (if applicable) *ICPC Code* for the new vaccine. Enter this information and click **Save** to create the vaccine.

Please note: If you need to transmit the new vaccine to AIR, the correct Vaccine Code must be entered in this window.

To download any new or missing vaccines automatically, click the **Update** button. Genie will check for any updates and add missing vaccines to the list as appropriate.

Any vaccine in the list on the left can be modified by double-clicking it, and deleted by highlighting it and clicking the **Delete Vaccine** button.

Editing Vaccine Sets

Vaccine sets can be created for any groups of vaccines that need to be administered at the same time – for example, to help you manage childhood immunisation schedules.

Click the **Add Set** button to create a new vaccine set. Genie will prompt you to enter a name for the set. Enter a name and click **OK**.

Request

Enter set name:

12 months

Cancel OK

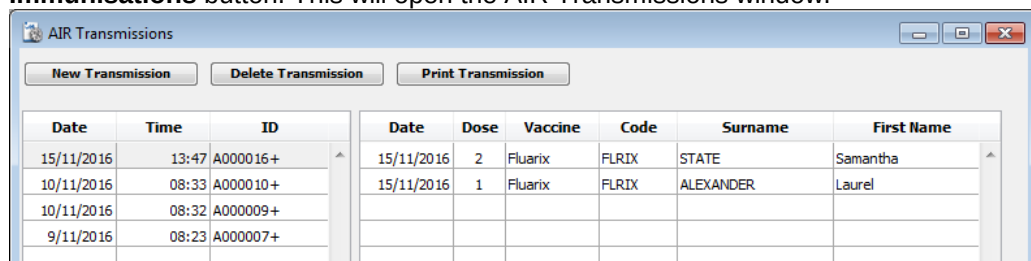
Once the set has been created, add vaccines to it by clicking and dragging them from the list on the left onto the appropriate set on the right. If you make a mistake, vaccines can be removed from a set by right-clicking the set and clicking the code of the vaccine you wish to remove.

6.2.1.2 Transmitting to AIR

Once a vaccination has been added to a patient's clinical record (with *Transmit to AIR* ticked), it can be transmitted to Medicare to be recorded on the Australian Immunisation Register.

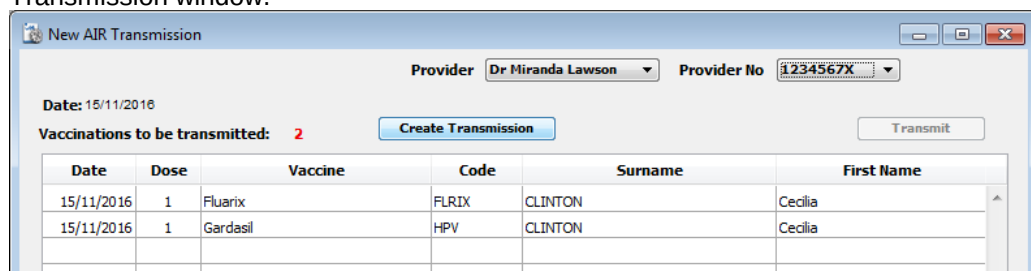
For information on adding a vaccination, please see the [Vaccinations](#) section.

To transmit vaccinations to AIR, navigate to **File > Maintenance and Reports > Daily**, and click the **AIR Immunisations** button. This will open the AIR Transmissions window.



This window will list all previous AIR transmissions that have been batched and sent. Highlighting a batch in the list on the left will display the items contained within that batch on the right.

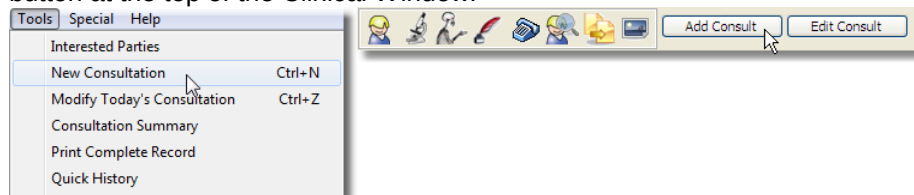
To create and transmit a new batch, click the **New Transmission** button. This will open the New AIR Transmission window.



Select the appropriate provider and provider number for the vaccinations to be transmitted. Of the vaccinations that appear, if you wish for any to be excluded, right click them and select *Remove From Batch*. When you are happy with the list of vaccinations to be transmitted, click the **Create Transmission** button and then **Transmit**. The vaccinations will then be sent to Medicare for processing.

6.3 Consultation Notes

To open a new consultation note, either press **Ctrl+N** OR **Tools > New Consultation** OR click the **Add Consult** button at the top of the Clinical Window.



Once this window is displayed, you can resize it to suit your needs. Genie will remember this selection the next time you open an Add Consult window.

Presenting Problems

Presenting Problems aid in searching and reporting consults, as well as providing you with headings for your consults in the Contact List.

To enter the presenting problem(s), you can select the problem from the menu at the top left of the Consult window.

This menu can contain up to five sections:

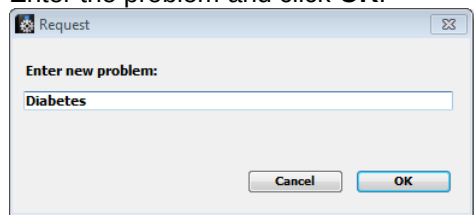
1. Add to Menu
2. New Problem
3. Current Problems
4. Past History
5. Previously used consultation reasons for **any** patient
6. Previously used consultation reasons for **this** patient (if it is not already listed at 1, 2, 3, or 4 above)

User added items can be deleted by holding down **Alt**, selecting the Presenting Problem drop-down list and highlighting the problem to delete. Let go of your mouse, let go of **Alt**.

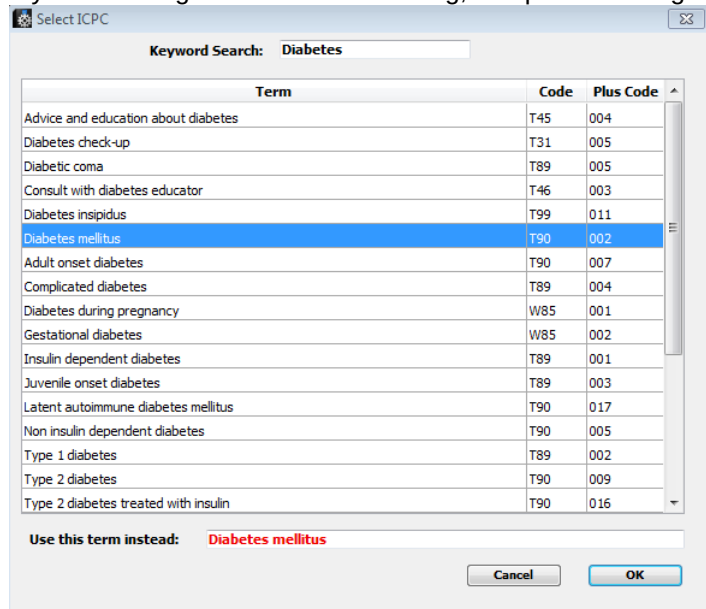
You can add multiple problems for each consultation.

If the problem you would like is not in this menu, select *Add to menu...* and enter in the name of the problem. If the problem is a rare or one-off problem, select *New Problem* which will add it only to that patient.

Enter the problem and click **OK**.



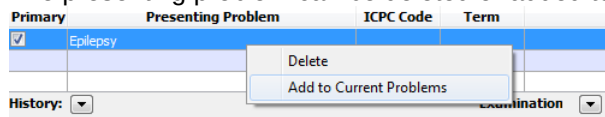
If you are using ICPC or ICD10 coding, a separate coding window will appear.



Select the appropriate item from the list, or just click **Select** to use what you have typed.

The presenting problems can be added to the *Diagnosis* field in the consult window by double-clicking on them.

The presenting problem can be deleted or added to the Current Problem list by right-clicking on the problem.



A Presenting Problem can also be deleted using the small **Garbage Can** button  beside the *Presenting Problems* drop-down menu.

Adding Consultation Notes

To add consultation notes, simply start typing in the History, Examination, Treatment/Plan and Diagnosis areas. The consult is saved when the Clinical Window is saved, or when **OK** is clicked in the Add Consult window.

Different font formatting can be used to ensure particular notes stand out when you view this consult in the preview pane. There are three different font formats you can use:

- Encapsulating your text in braces ({ }) will result in the text being underlined, e.g. {word} becomes word.
- Encapsulating your text in carets (^) will result in the text being bolded, e.g. ^word^ becomes **word**.
- Encapsulating your text in square brackets ([]) will result in the text being red and bolded, e.g. [word] becomes **word**.

Checklists can aid in note taking, particularly for standard examinations and pre op checks. See the section on [Checklists](#).

The **Macros** button allows you to add, edit, and remove any macros you wish to use to aid your typing. For more information on how to edit and use macros, please see the [Macros](#) section.

The **Drawing Module**  button allows you to annotate drawing templates or photos of relevance to the current

consultation for future reference. For further information, see the [Drawing Module](#).

The *Letter Dictated* tickbox aids your typist and you in keeping track of dictated letters (See [Today's Consultations](#) in the Patients Menu)

Consult notes can be edited directly before midnight or appended thereafter by clicking the **Edit Consult** button or double-clicking on the consult in the All Contacts list of the general clinical window.

To prevent other users from editing or appending your consultation, click on the **Lock** button  at the top of the Add Consult window. When you click on this button, you will be presented with the following prompt.

If locking your consultations is something you would like to do more often than not, it is recommended that you select **Yes** in this window. If you lock consultations by default, you are always able to leave one unlocked by clicking the lock button before leaving the consultation window.

Measurements

To add a new Measurement record from within a consultation, you can either press **Ctrl+N** or click on the **Blue Plus** button .

A new Measurement record window will open.

Note: For patients over 20 years of age, their previous height is entered automatically the next time a new measurement record is opened.

The measurement(s) will appear in the display area of the Clinical Window when the corresponding consultation record is displayed.

To delete a measurement record, highlight it and click the **Garbage Can** button. Some of these measurements can be graphed by clicking the **Graph** button.

BP/Weight radio button displays all previously recorded measurements to do with blood pressure and BMIs etc.

The **Pathology** radio button will display previous pathology results that are imported into Genie in PIT format (provided the *Extract Path Results PIT Format* is ticked in **File > User Preferences**) or HL7 format (provided [Track Individual Pathology Results](#) is set up in Maintenance and Reports) or those manually entered into the Measurements window.

The following measurements will be auto populated if tracking is selected for those tests in Maintenance and Reports:

- BSL
- Creatinine
- Cholesterol
- Trigs
- HDL
- LDL
- HbA1C
- PSA
- Potassium
- ACR
- Microalbuminuria

Note: Pathology result measurements other than those listed above will not populate into other measurement fields in the Clinical Window eg. Obstetric History or Current Pregnancy.

VAs displays previous visual acuity records

Keeping Separate Consultations

To add another consult when one has already been created for that day, simply open up another new consult window (**Tools > New Consult** or Ctrl N).

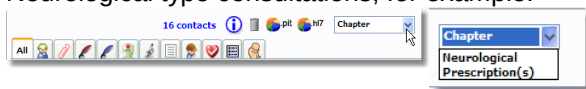
If you don't wish to create a separate consultation for the same day, then just use the keyboard shortcut, Ctrl Z

or **Tools > Modify Today's Consultation**, or the **Edit Consult** button, as this will open up the existing consultation window. It will create a new consultation if one doesn't already exist.

Viewing Consultation Notes

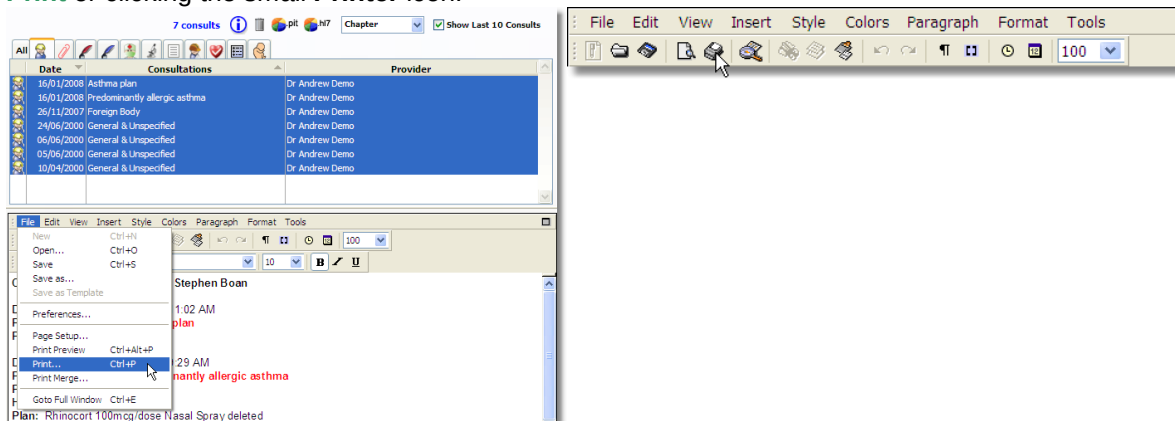
Consultation notes can be viewed in the display area by clicking on the record, or several at a time by Shift+clicking or Ctrl+clicking on the required consults.

They can also be viewed according to their ICPC code. If you are using ICPC coding, a pop-up menu will appear above the All Contact list. This codes display presenting problems by Chapter, allowing you to view all Neurological type consultations, for example.



Printing Consults

Once you have your required Consults or Pathology results highlighted and on display in the display area (by Ctrl+clicking or Shift+clicking the required consults), you can then print the display area by selecting **File > Print** or clicking the small **Printer** icon.



Deleting a Consult

To delete a consult from the All Contacts List, highlight the required consult and then click on the **Garbage Can** icon. Or you can right-click and select Delete.

Note: Before midnight of the day it is created, this will delete the consult altogether. After midnight the consult isn't deleted per se, it is just hidden from the Contacts List.

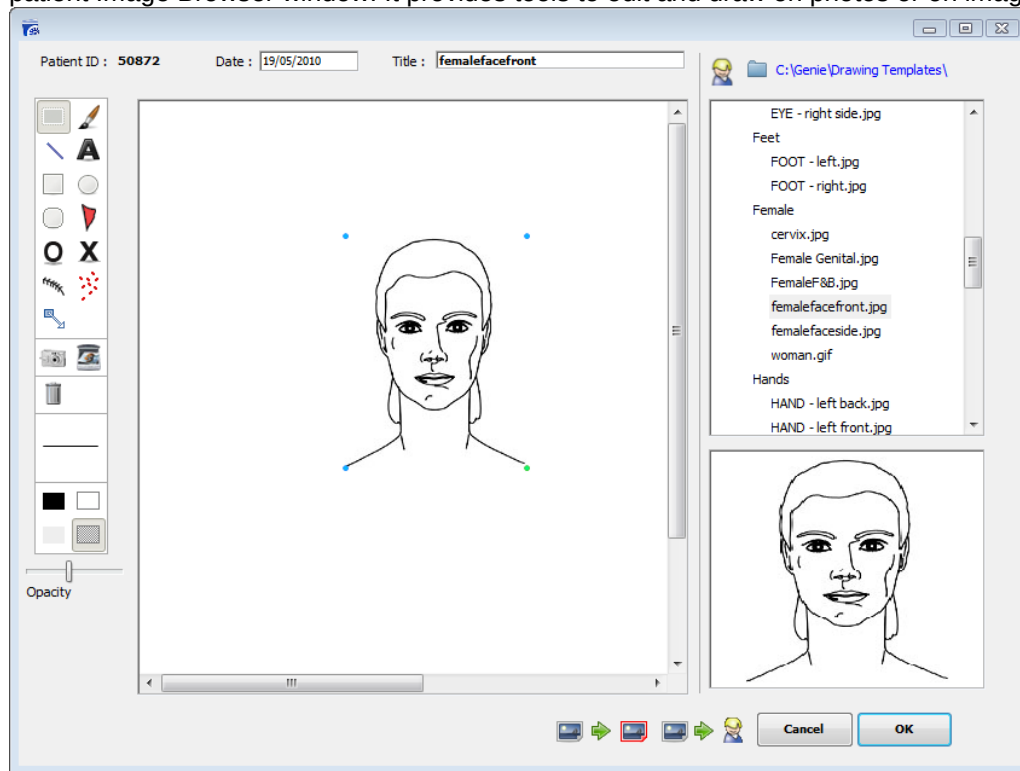
Alt+clicking on the **Garbage Can** icon will display the deleted consults in the Contacts List. Alternatively, you can print a Consultation Summary, **Tools > Consultation Summary**, which gives you the option to *Include Deleted Consultations*.

Checking Consults Have Been Created

You can check that you have made consultation notes for all appointments of a particular day by going to that day in the appointment and selecting **Appts > Check Missing Consults**. This will check for a consultation record for the date selected and for notes typed into the History field. You must have typed notes into the History field for this feature to work.

6.4 Drawing Module

The Drawing Module can be accessed via the **Paintbrush** button  in the **Add Consult** window or from the patient Image Browser window. It provides tools to edit and draw on photos or on images stored as templates.

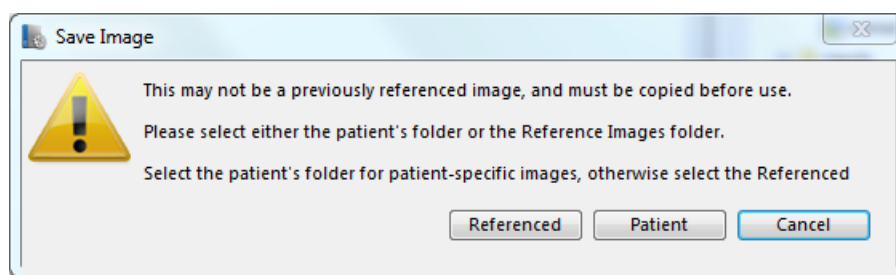


A single click on a template on the right hand side of the drawing window will preview the image underneath the template list. You can then drag and drop the image from the preview into the drawing canvas for annotation in relation to your current patient. You can drag more than one image onto the canvas for annotation.

You can retrieve images from the patient's image folder by clicking on the **Get Pictures from Patients Folder**

button  in the top right of the drawing window. The blue folder beside this allows you to browse for an image anywhere on your machine to annotate.

If you choose an image that has not been referenced previously, you will receive the prompt below.



If this is an image you will only use for this patient (e.g. a photograph of this patient that you would like to annotate), select **Patient**. If this is an image you will use for many patients (e.g. a new image for generalised use), select **Referenced**.

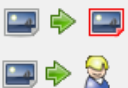
Use the tools to the left of the canvas area to add text boxes, shapes and other features to the images.



Select/move images and objects



Free draw

 Draw straight lines	 Type text
 Draw squares or rectangles	 Ellipse (Ctrl+click for circle)
 Draw rounded rectangles	 Draw freehand filled area
 Bullet circle stamp (usually used with an audiogram template)	 Bullet cross stamp (usually used with an audiogram template)
 Draw stitches, stitches will appear tighter and closer together when drawn slowly.	 Draw rashes
 Annotate image (includes arrow from annotation to to image)	 Flip horizontally (Ctrl+click to flip vertically)
 Acquire image from camera	 Acquire image from scanner
 Delete currently selected object	
 Alter line thickness and format. Clicking on this will display the next button.	 The line thickness and format selection displayed when the line button is pressed.
 These buttons are the line colour and fill colour, respectively.	 These buttons are the draw objects transparent and draw objects filled, respectively. This applies to the drawing of shapes.
 Opacity This slider controls the opacity of the selected object.	 These buttons are the Save as an Editable Template and Save as an Image in the Patient's Attachment Folder buttons, respectively.

Selecting Multiple Images

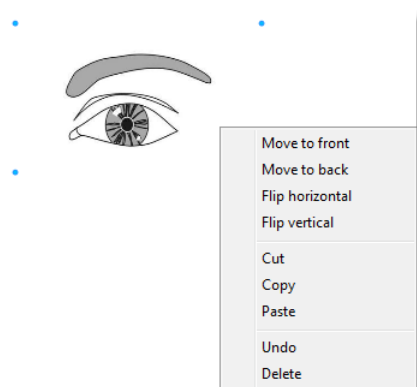
To select multiple images on the canvas, click the Selection tool and **Shift+click** each object. To select all objects, click and drag to create a selection area over all objects. To move all selected objects together, hold **Shift** whilst dragging the selected objects across the canvas.

Modifying Images

To rotate an image **Ctrl+click** and drag on one of the blue selection markers.

If an object is resizable, one of the selection markers will be green which you can click and drag to resize

Right-clicking on an object will result in a menu.



Move to....: this feature is used when you have overlapping objects that you would like to arrange in order of front to back.

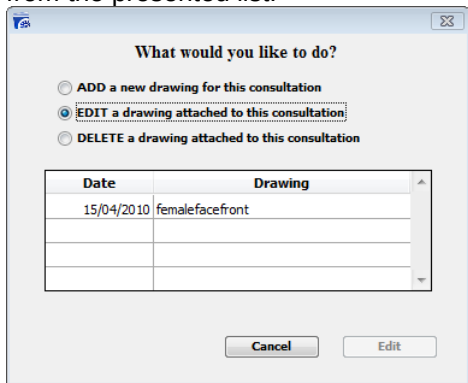
Flip....: flips the selected object.

Saving Images

If the Drawing Module was accessed via the Consult window then clicking **OK** will save the image to the patients consult notes. You also have the option of saving the image in the patients list of images for access via the Image Browser by clicking the **Save as an image in the Patient's attachment folder** button.

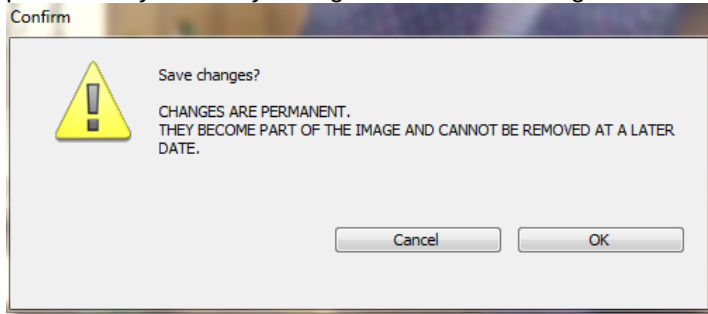


You can access a previously saved drawing by opening the relevant consultation record, and clicking on the **Drawing Template** button. Select *Edit a drawing attached to this consultation* and highlight the required drawing from the presented list.



Additionally, you can *add a new or delete an attached drawing for this consultation*.

If the drawing module was accessed via the Image Browser window, then clicking **OK** in the drawing window will permanently save any changes made to the image.



Creating Drawing Templates

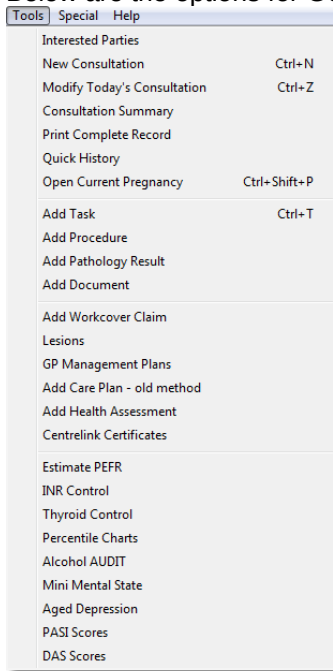
If you do not wish to use a template, you can simply draw freehand onto the canvas. You can then save the new image as a template for future use by clicking on the **Save as an editable SVG template** button.



6.5 The Tools Menu

The options that are displayed in the Tools menu will depend on which Practice Type is set in **File > Set Practice Type**.

Below are the options for General Practice, which covers most options in the various practice types.



Interested Parties

Opens the list of all Interested Parties associated with this patient eg. referring doctor etc. This list can also be accessed wherever you find the **Two surgeons** button .

New Consultation Ctrl+N

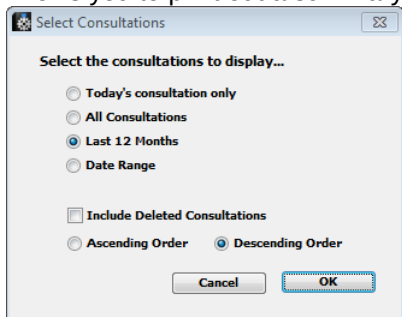
Opens a New Consultation window

Modify Today's Consultation Ctrl+Z

Allows you to edit the existing consultation for the current day. If there is no consultation for the day, Genie will create a new one.

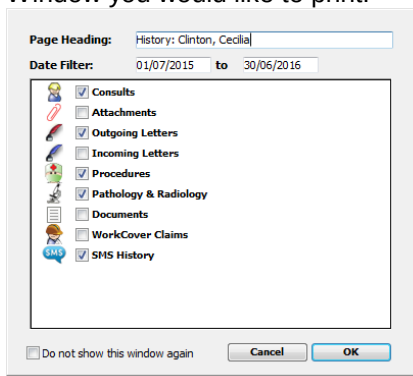
Consultation Summary

Allows you to print out a summary of the patient's consultations.



Print Complete Record

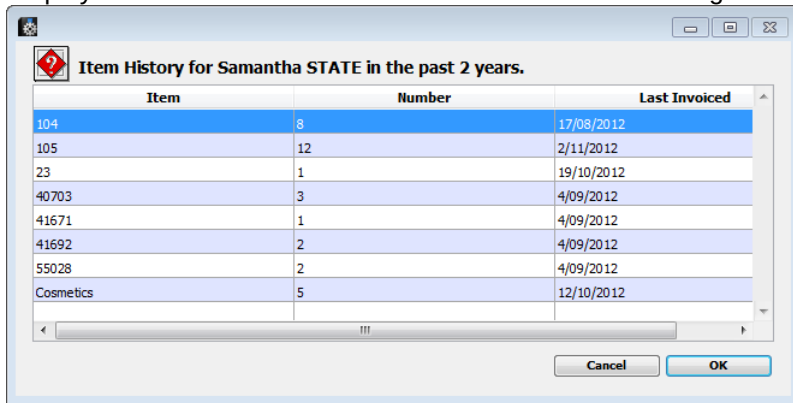
Prints out the Patient's complete clinical record. You will first be prompted as to which components of the Clinical Window you would like to print.



Note: If you have previously ticked the 'Don't show this window again' checkbox in this window, you can **Shift+click** on Print Complete Record to revert to seeing this window each time.

Quick History

Displays a list of all the item numbers which have been charged for this patient in the last two years.

**Open Current Pregnancy** **Ctrl+Shift+P**

Will open or start a new pregnancy for this patient. Only available if patient is marked as female and is over 12 years old.

Add Task Ctrl+T

Allows you to assign a task as a reminder to yourself or another user about the current patient. This will be listed in the **Other** or **Checklists/Script Archive** tab of the Clinical Window.

You can print out tasks by selecting the **Print** button. (For more information on [Tasks](#) see the Reception Module).

Add Procedure

Opens up a Procedure window. For more information see the [Procedures](#) chapter.

Add Pathology Result

Opens a window that allows you to manually enter the details of a pathology result you have received.

Add Document

Opens up a document window which allows you to enter free text. This document can then be accessed via the **Documents** tab  in the Clinical Window's contact list.

Add Workcover Claim

Creates a Workcover Claim. Workcover certificates can be generated from within this window by clicking on the  button. **Alt+clicking** on this button will allow you to use a certificate from a different state, for those practicing in border regions.

Workcover certificates can be downloaded into Genie from the [Software Updates](#). Navigate to **Special > Software Updates** and select the *Workcover certificates* tab to view the certificates available for download. If the certificate you require is not in this list, it means that it has not been made available to Genie Solutions for dissemination. If you have a copy of a new certificate, send it to the Genie support team so it can be uploaded to the Genie web server.

You will be able to use the downloaded certificates if:

- You have the option to *Use Custom forms Workcover Certificates* ticked in your [User Preferences](#), and
- Your practice type is set to anything except Obs/Gynae/IVF Specialist or Anaesthetics.

To specify the doctor who is creating the certificate, click the *Submitted by* drop-down menu and select the doctor. By default, the name that appears in this drop-down menu for a new claim will be the user who is currently logged in. For existing claims, it will be the last doctor selected in the *Submitted by* drop-down menu for this patient. Changing the doctor will not affect previously created certificates, only assign them to the new certificate. Certificates created by doctors other than the selected doctor, will have their name appear next to the certificate.

Certificates

- 29/09/2017: Progress (QLD)
 - Printed 29/09/2017 11:21:39
- 13/09/2017: Initial (QLD)
 - Printed 29/09/2017 11:21:17

Certificate: QLD

Submitted by: Dr Miranda Lawson

You can also use the Certificate drop-down menu to select a different state's certificate for any interstate claims, should you need to. If using custom forms certificates, you will need to follow the instructions above to download the appropriate certificate for each state you may need to select from this list.

Previously created Workcover Certificates will be stored in this window, and are accessible by double-clicking on the certificate details. Once printed, a record will appear under the certificate details with a printed date and time. Double-clicking this line will display the printed certificate in your default image viewer. A copy of the certificate is saved in .png format in the Workcover folder inside the patient's images folder. This enables you to keep a record of what was printed and handed to the patient.

If a certificate was printed in error or the details are not correct, it can be deleted by selecting the printed record under the certificate details and clicking the **Delete** icon. This will delete the printed certificate but keep the certificate information.

A preview of the printed certificate can also be viewed from the Clinical window by selecting the relevant Workcover claim:

Date	Title	Info	Provider
1/08/2014	Dislocated shoulder		WORKCOVER

WORKCOVER CLAIM

Injury Date: 1/08/2014
 Injury: Dislocated shoulder
 Location: Right shoulder
 Mechanism of Injury: Fell on a packing crate.
 Claim Number: 12345

CERTIFICATES

Date: 1/08/2014 (Final) Provider: Dr Miranda Lawson
 Date: 1/08/2014 (Initial) Provider: Dr Miranda Lawson
 Date: 1/08/2014 (Progress) Provider: Dr Andrew Largeman

page break

Cert Date: 1/08/2014 (Final) Printed: 1/08/2014 14:12:18

Department of Justice and Attorney-General
 Workers' Compensation Registrar

Form 86.R
 Version 5
Queensland workers' compensation medical certificate
 Workers' Compensation and Rehabilitation Act 2003
 Parts A and E of this medical certificate comprise an approved form under the Workers' Compensation and Rehabilitation Act 2003.
 INSTRUCTIONS: Tick if applicable, and fill in the information as requested.

☐ New claim Claim number: 12345

Part A - Worker's details
 I certify that on 1/08/2014 I attended to (given name) Amanda
 (surname) FRANKLIN Date of birth 23/04/1975

Part C - Medical management plan
 Treatments: _____
 Medication prescribed: _____
 Referred to specialist (specialty/home): _____
 Referred to allied health professional (discipline/home): _____
 Detail (specialist): _____
 I would like the insurer to arrange a case conference with (tick more than one if appropriate)
☐ Treating practitioner ☐ Treating Specialist ☐ Treating Allied health ☐ Employer
☐ Employer has been contacted ☐ I would like the insurer to contact the further information: _____

Part D - Rehabilitation and return to work plan
☐ Approval is given for a suitable duties program with the following guidelines
 Lifting: weight limit _____ kg ☐ ☐
 Bending: twisting/squatting ☐ ☐ ☐

For more information on creating and invoicing Workcover claims, see [Invoicing Workcover](#).

Lesions

Opens the Lesions module which allows for easier tracking of excisions of lesions and ordering/tracking of histopathology.

GP Management Plans

Opens up a GP Management Plan History where you can view past plans as well as create new ones. To add a new plan, click the **New** button. This opens up a GPMP Template window. Select your template using the Template drop-down menu, many of which can be downloaded by opening the Software Updates window ([Special > Software Updates](#)) and selecting the *Letters* tab. Alternatively, you can create your own using the *New Template* option. The set up of these templates works in the same way as [Referral/Reply Letters \(Patient Correspondence\)](#).

Add Care Plan (Old Method)

Creates old style Care Plans which are then accessed via the **Care plans** tab  in the Clinical Window's contact list.

These have now been replaced by [GP Management Plans](#).

Add Health Assessment

Allows you to create Health Assessments, covering areas such as Allied Health, Nutrition and Mental functioning. Health assessments can be saved and then accessed via the **Health assessments** tab  in the Clinical Window's contact list.

Add Centrelink Certificate

Allows you to add a Centrelink Certificate.

Estimate PEFr

Provides an estimate of the Peak Flow Rate based on height.

INR Control

Allows you to keep track and control patients' INR doses. INR pathology results can be linked to the INR Control by highlighting the INR reading in the result and clicking the **INR** button  to record the information about the reading.

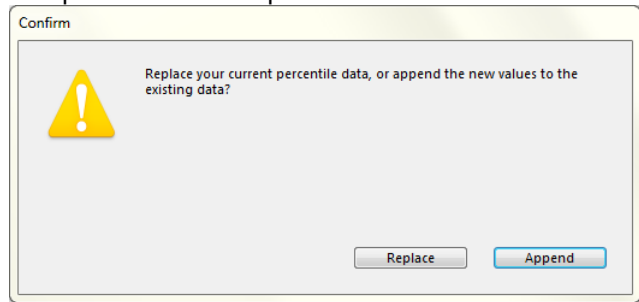
Thyroid Control

Allows you to keep track and control patients with thyroid conditions.

Percentile Charts

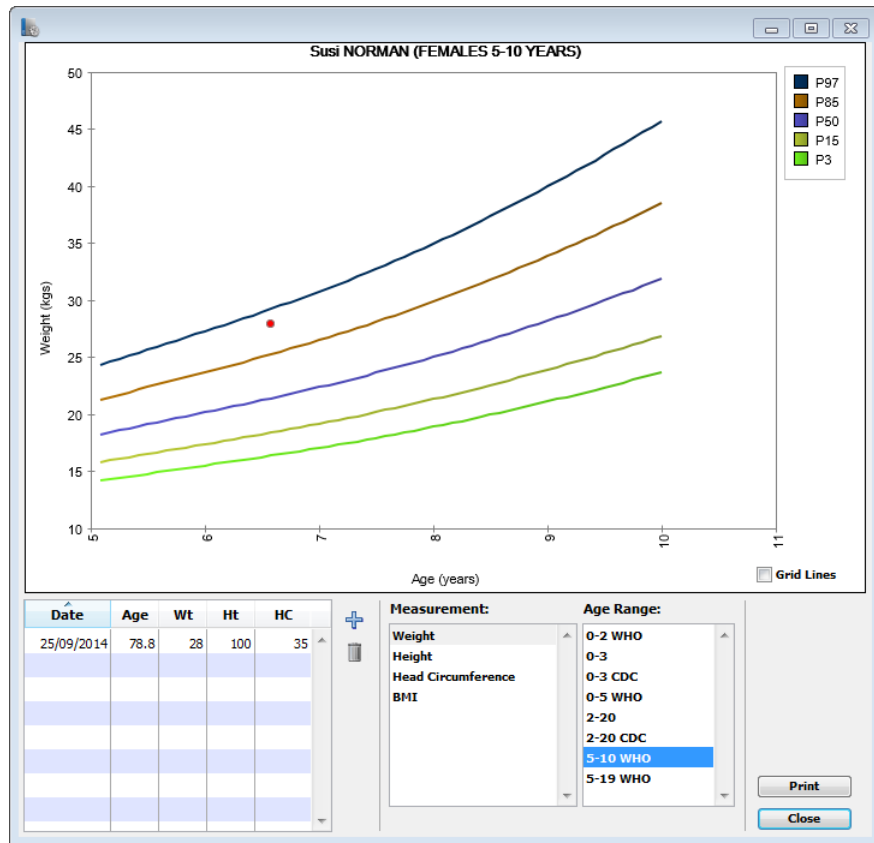
Displays paediatric percentile charts for the patient. These will automatically plot any measurements recorded in the Measurements table. You can add new measurements from this window by clicking on the **Add Record**  icon. Conversely, you can delete measurements by selecting the relevant measurement and clicking the **Delete**  icon.

From Genie version 8.6.6, you can download and use the percentile charts from different health organisations. For example, the Centre for Disease Control (CDC) and the World Health Organisation (WHO). These can be downloaded by selecting **Special > Software Updates**, in the **Miscellaneous** tab ticking the checkbox to the left of the relevant percentile data and clicking the **Install 1 item** button. In the window that appears, click **Replace** to replace the current percentile data with the selected data, or **Append** to add it to your existing data.



Note: Replacing the percentile data will replace it for all patients in Genie. The only way to change back to the original data would be to download the Percentile Data from the Software Updates window and select Replace.

When you open the Percentile Chart window for the patient, you can select which chart to view the measurements against by selecting the relevant option in the *Age Range* field. If you chose to append the new values, you will have several options available in this field.



Alcohol Audit

Opens an Alcohol Disorders Identification Test. The results of the test are placed in the Treatment/Plan section of the consult window. This occurs even if you have not yet created a new consultation record. This also applies for the Mini Mental State Examination and the Aged Depression Scale.

Mini Mental State

Opens a Mini Mental State Examination. The outcome of this examination will be placed in the Treatment/Plan section of the consultation record.

Aged Depression

Opens a Geriatric Depression Scale questionnaire.

PASI Scores

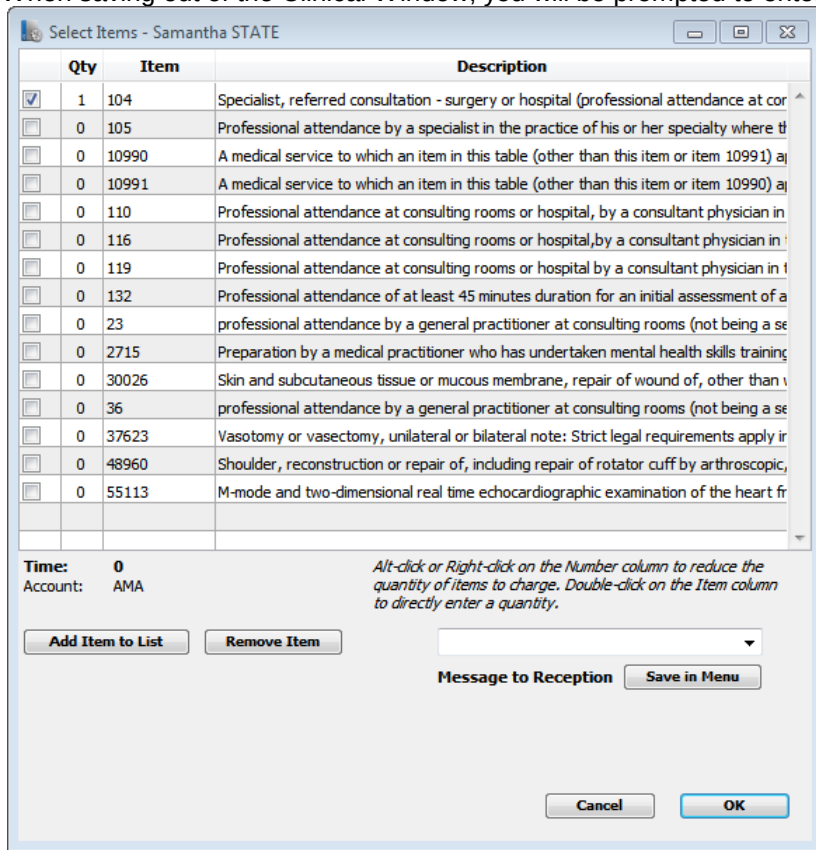
Opens Face, Hand & Foot/Whole Body PASI Scoring system for psoriasis.

DAS Scores

Opens DAS Scoring system for rheumatology.

6.6 Specifying a Fee to Charge

When saving out of the Clinical Window, you will be prompted to enter in an item to charge.



Qty	Item	Description
☒	1	104 Specialist, referred consultation - surgery or hospital (professional attendance at cor...
☐	0	105 Professional attendance by a specialist in the practice of his or her specialty where th
☐	0	10990 A medical service to which an item in this table (other than this item or item 10991) a
☐	0	10991 A medical service to which an item in this table (other than this item or item 10990) a
☐	0	110 Professional attendance at consulting rooms or hospital, by a consultant physician in
☐	0	116 Professional attendance at consulting rooms or hospital, by a consultant physician in
☐	0	119 Professional attendance at consulting rooms or hospital by a consultant physician in t
☐	0	132 Professional attendance of at least 45 minutes duration for an initial assessment of a
☐	0	23 professional attendance by a general practitioner at consulting rooms (not being a se
☐	0	2715 Preparation by a medical practitioner who has undertaken mental health skills training
☐	0	30026 Skin and subcutaneous tissue or mucous membrane, repair of wound of, other than v
☐	0	36 professional attendance by a general practitioner at consulting rooms (not being a se
☐	0	37623 Vasotomy or vasectomy, unilateral or bilateral note: Strict legal requirements apply in
☐	0	48960 Shoulder, reconstruction or repair of, including repair of rotator cuff by arthroscopic,
☐	0	55113 M-mode and two-dimensional real time echocardiographic examination of the heart fr

Time: 0
Account: AMA

Alt-click or Right-click on the Number column to reduce the quantity of items to charge. Double-click on the Item column to directly enter a quantity.

Add Item to List Remove Item

Message to Reception Save in Menu

Cancel OK

Note: This window will only appear if you enter the Clinical Window via the Appointment Book and the patient has not yet been invoiced for that day (indicated by no dollar value in the Invoice column of the Appointment Book). You must also have a Default Item entered into your User Preferences.

If you do not wish to be prompted with this window, leave the *Default Item No* field blank in **File > User Preferences, General** tab.

Default Item No:

Items displayed in the list are those that have been specified as '*Display in List of Commonly Used Items*' via **Open > Billing Items**. If you wish to add more items to this list, click on the **Add Items to List** button. The items must be a valid MBS items or be added to **Open > Billing Items** before they can be added to this list. To remove items from this list, click the **Remove Item** button.

The item number entered in your User Preferences as your Default item will be the one that will be ticked by default. If you do not wish to charge this item, simply untick it and tick another. If you wish to charge multiples of the same item, click into the *No* column to the right of the item or double-click to type the quantity in manually. To remove multiples right-click or **Alt+click** in the number column. If you would like this window to appear without an item ticked by default, set your *Default Item No* in your User Preferences to '0' (zero).

If bulk billing a pensioner or child under 16, the incentive item (ie.10990/10991) will be ticked automatically, provided you fulfill all the criteria listed:

1. It is in the list of items.
2. Your Practice Type is set to General Practice.
3. Your default item number in your User Preferences is either 3, 23, 36, or 44.
4. The patient's *Account Type* in their Patient Demographics window is 'Bulk Bill'.
5. The patient is either under 16 or has a HCC or Pension number entered into their Patient Demographics window.

If you wish to relay a message to reception, use the *Message to Reception* drop-down. Any text entered in this area will appear beside the patient's name in the Appointment Book bound by square brackets, e.g. [Bulk bill

please].

If you wish to type or continue typing your clinical notes after the patient has left the consult, you can still specify the item to charge by saving out of the file, and returning straight back in to type your notes.

6.7 Prescribing

MIMS Subscription

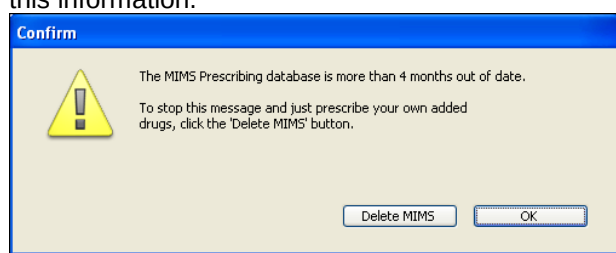
Genie uses prescribing data supplied by MIMS Australia. This is supplied via monthly download in **Special > Software Updates** in Genie to those users with a current MIMS Integrated subscription.

To subscribe to MIMS Integrated:

Visit their website at <http://www.mims.com.au>, OR

Phone MIMS on 1800 800 629.

If your MIMS subscription is more than 4 months out of date, you will be presented with the following window. If you click the **Delete MIMS** button the MIMS database will be deleted, resulting in you no longer having access to this information.



6.7.1 Prescription Display

The Prescription area is alongside and below the *Quickscript* drop-down menu.

The column order in the prescription list can be changed by clicking on the title of the column and dragging to required position. Column width can be adjusted by positioning the cursor on the divider between column titles until a double arrow appears, then clicking and dragging the column to the desired width.

A single click on a medication in the list will display the MIMS Abbreviated information in the display area, provided you have the large patient window (see [Clinical](#)).

Cat	Print	Printed	Reason	Medication	Dose	Frequency	Instru
☒				Aspirin 100mg Capsules			with food
☒				Celebrex 100mg Capsules			
☒				Ibuprofen 200mg Tablets			
☒		22/08/2012	Head Injury	Panadene 500mg/8mg Tablets	1	nocte	For 3 days
☒				Ventolin 500mcg/mL Injection			

Script Added 28/11/2012 Aspirin 100mg
 Script Added 28/11/2012 Aspirin 100mg
 Script Deleted 28/11/2012 Aspirin 100mg - Not stated

ASTRIX 100 Aspirin (C)
 Mayne Pharma International CMI Available: Yes
 P: Permitted in sport
Use: Prophylaxis of acute MI, unstable angina, TIA, CVA in patients with known CV or cerebrovascular disease
Contra: Severe hepatic or renal disease; bleeding disorder eg haemophilia; erosive gastritis or peptic ulcer
Prec: Asthma incl family history; peptic ulcer; surgery; high dose; pregnancy, lactation, teenagers, children
Adverse: GI distress; gastric mucosal irritation; ulcer; occult blood loss; hypersensitivity reactions incl bronchospasm, angioneurotic oedema

A double-click on a drug will open the MIMS annual entry in a web browser window which includes drug images.

MIMS Full Prescribing Information

[Composition] [Actions] [Indications] [Contraindications] [Warnings] [Precautions] [AdverseReactions] [DosageAdministration] [Overdosage] [Presentation] [PoisonsSchedule] [ReferenceDate]

Astrix 100

Company Mayne Pharma International
Primary Section: Cardiovascular System - Anticoagulants, antithrombotics
MIMS revision date: 01 Jan 2011

Composition Aspirin.

Actions Pharmacology. Actions. Inhibition of platelet aggregation. Aspirin acetylates the enzyme cyclooxygenase, thereby inhibiting the synthesis of prostaglandins; thromboxane in the circulating platelets and prostacyclin in the systemic vascular endothelium. Thromboxane is a vasoconstrictor and induces platelet aggregation, while prostacyclin is a vasodilator and inhibits platelet aggregation. The antiplatelet aggregating effect of Astrix 100 is postulated to retard or reduce the development of thromboembolic disorders. The low dose, enteric coat and relatively slow rate of release of aspirin is observed to selectively and irreversibly inhibit thromboxane synthesis. Aspirin inhibits thromboxane synthesis in the portal circulation and is presystemically metabolised to salicylate with negligible amounts reaching the systemic circulation to inhibit prostacyclin synthesis. Salicylate is effectively inactive at the blood concentrations achieved clinically and prostacyclin is less sensitive than thromboxane to aspirin.

Indications Treatment of patients with known cardiovascular or cerebrovascular disease, as an antiplatelet agent for prophylaxis against acute myocardial infarction, unstable angina, transient ischaemic attack and cerebrovascular accident (stroke).

Contraindications Severe hepatic or renal disease, haemophilia or other bleeding disorders, erosive gastritis or peptic ulcer. Aspirin hypersensitivity.

Warnings Therapy should cease one week prior to surgery due to increase in bleeding time.

Precautions Care should be taken when aspirin is administered to patients with asthma or peptic ulcers. Astrix 100 should only be used with concomitant anticoagulant therapy under medical supervision. One study showed that patients treated with Astrix 100, in conjunction with anticoagulant therapy, had a higher incidence (38.7%) of all types of bleeding events, when compared to patients treated with placebo, in conjunction with anticoagulant therapy (26.1%). There was no significant difference in incidence of major bleeding events between aspirin treated patients (12.9%) and placebo treated patients (10.3%).

Use in pregnancy (Category C) Animal studies have shown that aspirin can cause birth defects in numerous species. There is no conclusive evidence that aspirin causes malformations in humans. Drugs such as aspirin inhibit prostaglandin synthesis. When given late in pregnancy, it may cause premature closure of the fetal ductus arteriosus, prolong labour and delay birth. Aspirin increases the bleeding time both in the newborn infant and in the mother because of its antiplatelet effects. Products containing aspirin should be avoided in late pregnancy.

Use in lactation Aspirin is excreted into breast milk in low concentrations. Neonates excrete salicylates slowly and are more sensitive to the platelet inhibitory effect of aspirin. Salicylates should be avoided in breastfeeding mothers unless the potential benefits outweigh the risks.

Use in children Not recommended for use in children or teenagers.

Adverse Reactions The main adverse reactions occurring with aspirin therapy are gastrointestinal distress, nausea and vomiting, erosion of the gastric mucosa, ulceration and occult blood loss. Dizziness, tinnitus, temporary deafness and metabolic acidosis are associated with high dose aspirin therapy. The risk of side effects are minimal with the low, once daily dosage of Astrix 100. The increase in bleeding time has been shown to be potentiated by alcohol. Various reactions including urticaria and other skin eruptions, angioneurotic oedema, rhinitis and severe bronchospasm may be exhibited by patients sensitive to aspirin. Asthmatics, or those with a family history of asthma, are more likely to show hypersensitivity.

Dosage and Administration One 100 mg capsule daily with a glass of water.

Overdosage Symptoms. Those of salicylate intoxication. Mild cases may produce nausea, vomiting, sweating, thirst and tachycardia. Severe overdosage may show fever and CNS disturbances such as convulsions, hallucinations, coma and respiratory failure.

Treatment. Gastric lavage and emesis for mild cases and when severe, barbiturate administration or dialysis may be required.

Presentation Capsules, 100 mg (clear, containing white enteric coated pellets): 28's, 84's, 140's (blister pack).

Product Image: Astrix 100 Capsules 100 mg

Poisons Schedule 28's, 84's: Unscheduled.
 140's: S2.

Date of TGA approval or last amendment 28/05/2010

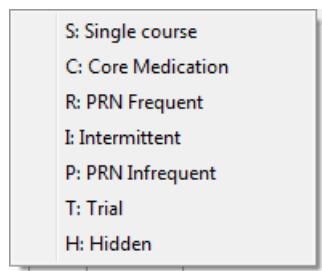
To modify the reason, dose, frequency, instructions or repeats, slow double-click in the area you would like to modify.

Cat	Print	Reason	Medication	Dose	Frequency	Instruc
☒	☐		Aspirin 100mg Capsules			with food
☒	☐		Celebrex 100mg Capsules			

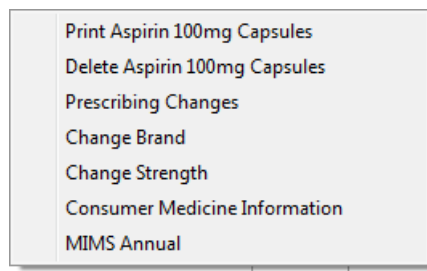
These changes are shown in the display area along with the MIMS Abbreviated when a medication is clicked as well as in the **Info** button . However, these changes are not retroactive. Changes are only tracked for drugs linked to MIMS, and which are not marked as 'once-only' (i.e. category S).

Clicking on the **Info** button will also allow you to select *Deleted Prescriptions*. This window includes non-S category (non-single use) medications that have been deleted. The deleted prescriptions are listed here with their respective *Reason* for deletion (e.g. *Adverse Reaction*).

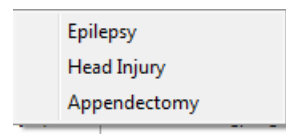
Right-clicking on the Category, Medication and Reason columns will display contextual popups depending on which column you right-click.



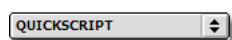
Category Column Popup



Medication Column Popup

Reason Column Popup
(populating from Current
Problems and Past History.)

6.7.2 Button Description



The **QuickScript** button allows you to quickly prescribe a medication for a patient. To add to this list see [Adding to QuickScript](#) in Adding a New Prescription.



The **Blue plus** button is used to add new prescriptions to the patient's current medication list. **Alt+clicking** on this button allows you to quickly add medications the patient is taking without having to specify strengths and dosages. This is useful for specialists who simply want to record the patient's medications without intending to actually print a prescription for them.



The **Information** button, tracks any changes made to the prescription dose, reason etc. It shows the Type of Change, Dose and Reason. You can insert a reason by right-clicking in the reason column for a list of common reasons or slow double clicking to add your own. **Alt+clicking** on the **Information** button displays the Progressive Medication History information.



The **Print** button will print the selected medications i.e. the medications which have a tick in the first column.

Alt+clicking on this button will select or deselect all the prescriptions.

Ctrl+Alt+clicking allows you to backdate a prescription.



The **Batch** button batches the selected prescriptions for later printing. GPs might use this when printing nursing home prescriptions. You would batch each patient's prescription rather than printing them immediately. Subsequently, select Print Batch from the Patients menu and all the prescriptions will be printed at once (**Open > Patients, Patients > Print Batch**).

Note: Authority prescriptions cannot be batched.



The **Medication Review** button allows you to perform a review of all the patient's current medications, which can subsequently be printed or saved as a consultation record.



The **CMI** button will display Consumer Medicine Information for the selected medication, if it is available. CMI information is supplied by MIMS and is not currently available for all medications.

On a network, this information is stored on the server in a folder called CMI in the Genie folder. The files are stored as Acrobat PDFs. When you select a particular item, the pdf is automatically copied from the CMI folder on the server to a CMI folder on the client machine so that the next time you view that particular CMI it is opened directly from the client machine.

Note: On Windows, you must have Acrobat Reader installed on your machine to open, view or print these files.



The **Medication Sheet** button allows you to print a six week nursing home sheet, a 2 week medication sheet for hospitals both with or without dates entered. Additionally you can print prescription labels for the Compact Business System.



Provided you have *NPS RADAR Alert* ticked in your User Preferences, this button will become active when an NPS RADAR review is available for the drug you have selected, as well as a RADAR summary popping up the first three times you prescribe a medication with a current NPS RADAR review. The NPS RADAR is updated either through the Special menu or through the Genie CD updates.



The **Garbage can** button will delete the selected medications. If only one medication is selected there is no warning. If more than one medication is selected you will be asked to confirm the delete command. You can delete multiple prescriptions at once by **Shift+clicking** or **Ctrl+clicking** and highlighting the required prescriptions. When deleting a medication, you are asked for a reason but only if the medication is not 'once-only' (i.e. assigned a category of 'S'), and it has previously been printed, otherwise it will be deleted immediately. You can also choose to create a class allergy to this medication when deleting the prescription. This reason can be accessed through the **Info** button  and the MIMS Quarterly display. If you re-prescribe a previously deleted medication, the old prescribing history, as well as the reason for stopping the medication will be displayed again.

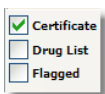


The **Reset** button can be used to restore the default prescription display if you have re-arranged the columns for example.

Ticking the *Reg 24* checkbox will print the Regulation 24 request on prescriptions i.e. "Regulation 24. Please dispense all repeats."

The **TPG** button will display a list of generic equivalents for the selected medication, allowing you to change the current medication to the equivalent without having to delete and re-prescribe it.

The **Strength** button allows you to change the strength of the selected prescription without having to delete and re-prescribe it.



Checking the *Certificate* checkbox will print a sick certificate in the lower right area of the prescription. Checking the *Drug List* checkbox prints the list of current medications in the lower left area of the prescription.

Note: If you would like to print a certificate without actually printing a prescription, you can create a new drug called 'Certificate' and enter it in your QuickScript menu. Then when you need a certificate 'Prescribe' the drug called certificate and print! Alternatively, create your own sick certificate using a merged letter template.

6.7.3 Adding a New Prescription

Click on the **Blue Plus** button above the prescription list to open the new prescription window. Prescriptions can also be added from within the Consult Window using the **Add Script** button.

Press 'Return' to prescribe the selected medication.

Drug Interaction Checking is set at Level 3 - MINOR OR CONTRA-INDICATED

MIMS Integrated 01/04/2018 - 30/04/2018 G5109/1/1

para Indication Company Browse

Medication	Strength	Form	Qty	Rpt	Code	Sched	Scr
Paracetamol/Caffeine	multiple ingr...	Optizorb...	[40]	Nil	Private		
Paracetamol/Codeine phosphate hemihyd...	500 mg/10 mg	Tablets	[20]	Nil	Private		Rx
Paracetamol/Codeine phosphate hemihyd...	500 mg/10 mg	Tablets	[40]	Nil	Private		Rx
Paracetamol/Dextromethorphan hydrobro...	multiple ingr...	Capsules	[24]	Nil	Private		
Paracetamol/Dextromethorphan hydrobro...	multiple ingr...	Capsules	[48]	Nil	Private		
Paracetamol/Dextromethorphan hydrobro...	multiple ingr...	Caplets	[24]	Nil	Private		
Paracetamol/Dextromethorphan hydrobro...	multiple ingr...	Caplets	[24]	Nil	Private		

Script

Dose B'fast MD Tea Bed

Instructions

Repeats

Reason

Category S: Single use, C: Core medication, R: PRN Frequent, I: Intermittent, P: PRN Infrequent, T: Trial, H: Hidden

Authority Indication

This product may cause drowsiness. Do not drive or operate machinery.

Memorise dose

Add New Drug

User Added Drugs

Cancel Healthshare Fact Sheets NPS RADAR Add to QuickScript MIMS Abbrev MIMS Annual Select

Genie begins searching the MIMS database after the third letter has been typed in the search box at the top of the window. You can narrow the selection by continuing to type more of the drug name.

To prescribe one of the displayed drugs, firstly double-click or use the **Up** and **Down** keys to highlight the desired drug. With this highlighted, press **Enter** or click on the **Select** button.

Dose, Frequency, Instructions

Script

Dose B'fast MD Tea Bed

Instructions

Repeats

Reason

Category S: Single use, C: Core medication, R: PRN Frequent, I: Intermittent, P: PRN Infrequent, T: Trial, H: Hidden

Once the medication has been selected, you can use the *Dose* fields to outline the dosage and frequency. To further specify information about the medication's dose, frequency, and administration, enter this into the *Instructions* field. Anything entered into this field can be saved for future use by opening the drop-down menu and selecting *Add to Menu*. For some medications, the *Instructions* field may be filled automatically by the MIMS Abbrev.

Once you have been through these steps the prescription window should look like this:

The *Repeats* field automatically defaults to the maximum number permissible. To change this to Nil repeats enter '0' or 'n' in this field.

The *Category* field allows you to assign a category to the prescription. Prescriptions marked as Single Use (S) are automatically deleted from the patient's record once they are more than 30 days old. Deletion occurs during the Cleanup process when the last user quits Genie. Additionally, prescriptions marked as Single Use (S) and Hide (H) will not be referenced in the 'Current Medications' expression in Referral/Reply Letters. If you wish to have such medications included, use the expression 'Prescription History' (see [Referral/Reply Letters \(Patient Correspondence\)](#) for more information).

Antibiotics, vaccinations, and cough mixture, etc are automatically marked as a Category S medication.

Note: Category S medications are automatically deleted 30 days after printing.

The *Memorise Dose* checkbox will 'remember' the dose, frequency and instructions for the selected medication, so that the next time you prescribe it in this window, the dose, frequency and instructions fields will be filled automatically.

The **MIMS Abbrev** button will display the MIMS Abbreviated information for the selected medications.

The **MIMS Annual** button will open the MIMS Annual application. Genie expects to find the MIMS Annual within the Genie folder on the client machine.

Healthshare

The *Email Healthshare Fact Sheet to this patient* tickbox will send a fact sheet to the patient about the drug being prescribed. This section will only appear when prescribing the selected drug to the patient for the first time.

If an email address has been entered into the patient's demographic window, it will appear in the email field here. If the patient has no email entered, or the email is incorrect, the correct email can be entered manually. If an email address is added or altered in this way, Genie will produce a prompt allowing the patient's demographic window to be updated accordingly.

This feature requires the *Allow sending of Healthshare Fact Sheets when Prescribing* preference to be ticked within the prescriber's User Preferences window (see the Setting Up Genie section of this manual for more information about [User Preferences](#)). The patient must also have a postcode entered within their demographic window, as some of the information provided by Healthshare depends on the state in which the patient lives.

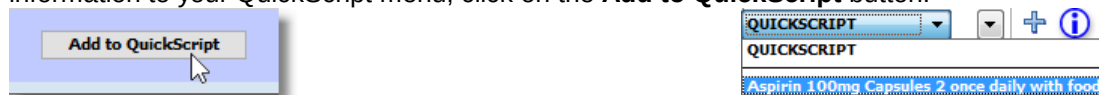
If you would like to review the fact sheet before it is sent to the patient, you can click the (*Preview*) link to open the fact sheet in a web browser.

Please note: These fact sheets are sent by Healthshare; the patient will receive the email from noreply@healthshare.com.au, not the Genie email module or your practice's email account. The content being sent to the patient is not provided or maintained by Genie Solutions.

Add to QuickScript

The **QuickScript** menu is a place to store your most commonly prescribed medications, allowing you to quickly prescribe any item in the menu for any patient.

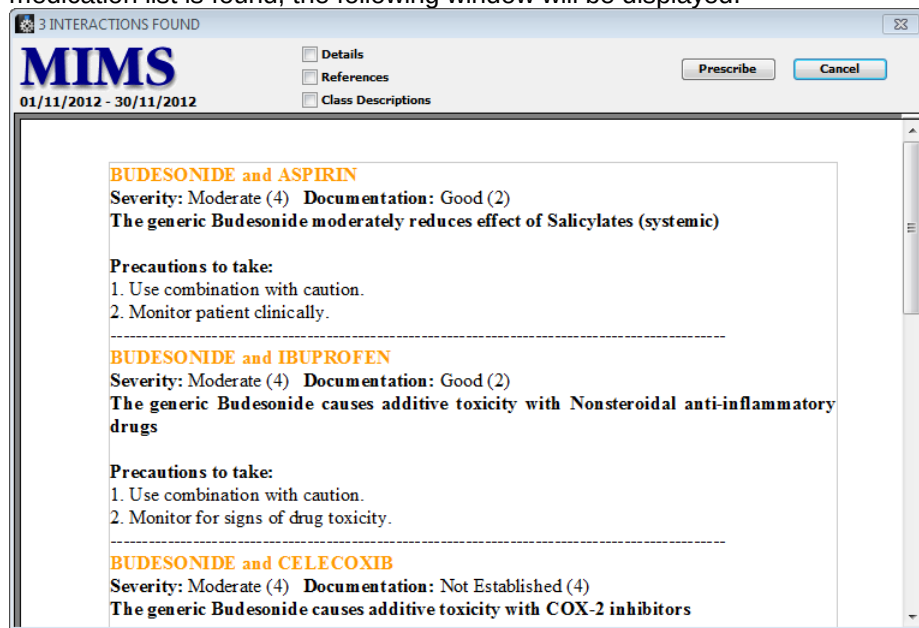
If you would like to add the selected medication, as well as the associated dose, frequency, and instructions, information to your QuickScript menu, click on the **Add to QuickScript** button.



When a QuickScript is added, information regarding the category and reason for the medication is saved.

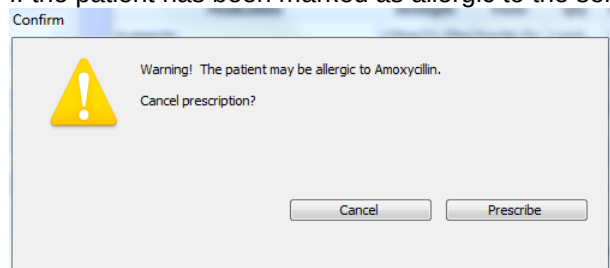
Drug Interactions

Once a drug is selected to be prescribed, provided it is part of the MIMS Prescribing data, Genie performs an allergy & drug interaction and pregnancy check. If an interaction with another drug in the patient's current medication list is found, the following window will be displayed.



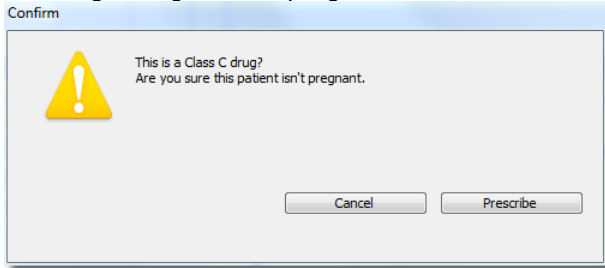
This window contains an explanation of the interaction and indicates the severity. You can still prescribe the medication by clicking the **Prescribe** button. The Interaction Level can be set in your User Preferences. It ranges from 0 to 5, where 0 has all possible and potential interactions and 5 has no interaction checking at all. A level of 3 is usually the best in practice. This covers Low, Moderate and High degrees of interaction, but does not include Unestablished interactions or those of No Clinical Significance. You can change the level of interaction checking by clicking the **Modify** button at the top right of the new prescription window. This will open your User Preferences (see User Preferences for more information). Click on the **Clinical** tab and set the level in here.

If the patient has been marked as allergic to the selected drug, or its class, an allergy warning will be displayed.



As with interaction warnings, you still have the ability to over-ride the warning by clicking on the **Prescribe** button.

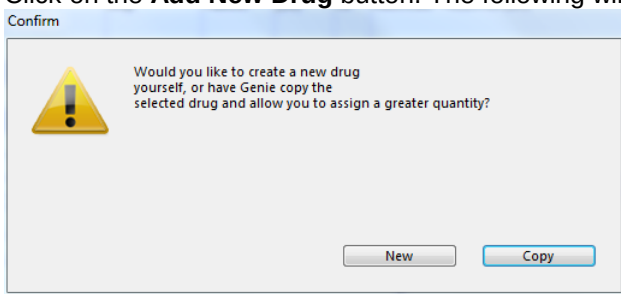
For drugs dangerous to pregnant women the following warning will appear



Add New Drug

The **Add New Drug** button allows you to add new drugs to the Drug Index. These can either be for increased quantities of an existing drug, or a totally new entry. To increase the quantity of an existing drug, search for the current quantity and highlight the entry.

Click on the **Add New Drug** button. The following window will appear:



Click on the **Copy** button.

Enter the quantity and number of repeats required. You will also need to choose between *PBS/RPBS Authority*, *RPBS Authority*, *Private*, or *Keep as Restricted - PBS/RPBS (NP)*.

An 'Enter New Details' dialog box. It contains the following fields and options:

- New Quantity:** A text box containing '[55]'
- Repeats:** A text box containing 'Nil'
- Authority Selection:** Four radio buttons:
 - ☒ PBS/RPBS Authority
 - ☐ RPBS Authority
 - ☐ Private
 - ☐ Keep as Authority - PBS/RPBS
- Buttons:** 'Cancel' and 'OK' at the bottom.

Once you have made these selections, the new drug entry will appear in the prescriptions window, allowing you to select it for prescribing.

Medication	Strength	Form	Qty	Rp...	Code	Sched	Scr...
Endone	5mg	Tablets	[20]	Nil	Restricted - PBS/RPBS (NP)	S8	Rx
Endone	5mg	Tablets	[55]	Nil	Authority - PBS/RPBS	S8	Rx

To add a totally new drug entry, click on the **Add New Drug** button. When asked if you would like to create a New Drug or Copy an existing one, click the **New** button. The following window will appear:

New Drug

Drug: Vitamin D Tablets

Strength: 600mg

Form: Tablets

Quantity: [60]

Repeats: Nil

Code: Private

Schedule: S4 Product: 0 Form: 0

Buttons: Cancel, Save

Enter the details of the drug and click the **Save** button. You will then be able to search on this information in the new prescriptions window.

User Added Drugs

The **User Added Drugs** button will display a list of drug entries added by users i.e. not supplied by MIMS

Drug	Qty	Rpts	Code	Schedule
Endone	[55]	Nil	Authority - PBS/RPBS	S8
Lucentis	[50]	2	Authority - PBS/RPBS	
Vitamin D Tablets	[60]	Nil	Private	S4

Buttons: Add, Delete, Close

6.7.4 Searching Prescriptions

Genie allows you to quickly search the database for:

- All patients taking a particular drug.
- All patients on two or more particular drugs.
- All patients on more than any particular number of drugs i.e. Polypharmacy.

For example, to search for all patients taking an ACE-Inhibitor:

Open the Patients list by selecting **Open > Patients**.

Click on the **Rx** button  to open the following window.

Search prescriptions by...

Drug Name: Polypharmacy

☒ Brand name ☐ Generic name ☐ Class

Search for:

☒ Find all strengths

☐ Search current selection only

☐ Find Exceptions

Restrict to scripts printed on or after: 00/00/00

☒ Exclude Inactive Patients

Buttons: Cancel, OK

This window allows you to search by Brand Name, Generic Name or Class. To search for ACE-Inhibitors, click on the **Class** radio button and enter the Brand Name of any ACE-Inhibitor and click **OK**.

This will enter the Class to search for in the previous window as shown below:

Click **OK**, and all patients on an ACE-Inhibitor will be displayed.

Note: To display all patients NOT on an ACE-Inhibitor, tick the *Find Exceptions* checkbox.

You may then want to find all patients who are on the ACE-Inhibitor and Warfarin. To do this, click on the **Rx** button again. This time, click on the **Generic** radio button and enter Warfarin in the search field.

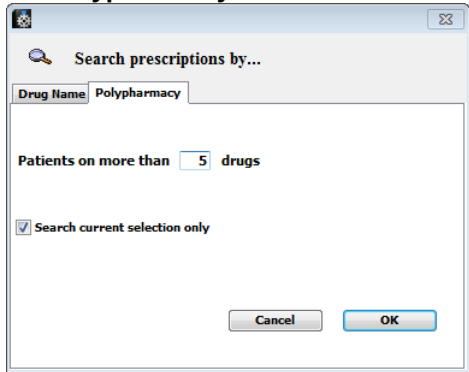
Tick the *Search Current Selection Only* checkbox. This tells Genie to only search amongst the list of patients already displayed.

You can use this function in combination with other searches. For example you may want to find all diabetics who are NOT taking an ACE-Inhibitor. To do this you would first search for diabetics through **Records > Search**. Then do the ACE-Inhibitor search, ticking both the *Search Current Selection Only* and *Find Exceptions* checkbox.

You can also limit the search only to those prescriptions which have been printed on or after a particular date.

Polypharmacy

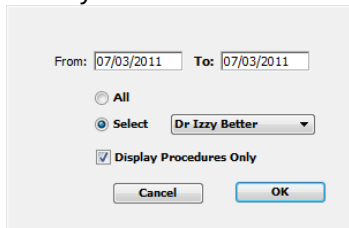
In this same window you can search for patients taking more than x number of prescriptions. To do this, click on the **Polypharmacy** tab and enter the number of prescriptions in the search field.



Note: You can also limit this search to just the current selection patients.

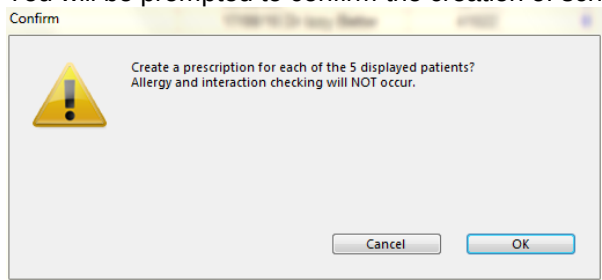
6.7.5 Printing Prescriptions to Multiple Patients

In order to print a prescription (or multiple prescriptions) to more than one patient eg. post operative medication to patients on a theatre list or Fluvax for over 65s, you first need to add the prescriptions required to your QuickScript list (See [Add to QuickScript](#)). You would then search for the list of patients required. For post operative medication for patients on a theatre list, you would go to **Patients > Today's Appointments**, select the day and the doctor and then tick *Display Procedures Only*.



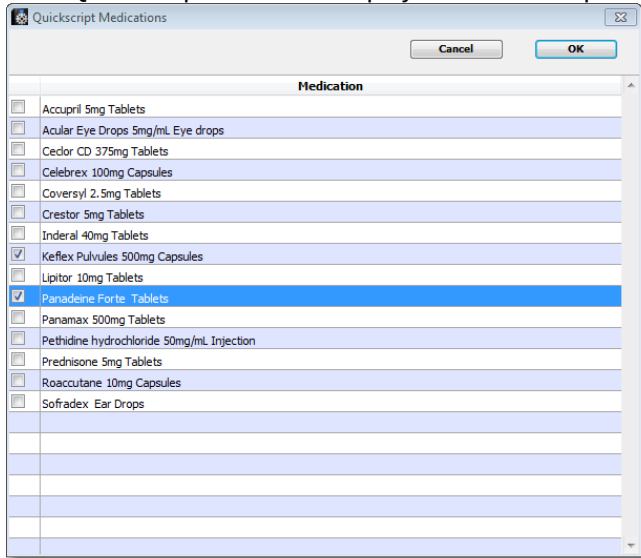
Then select **Patients > Print Prescriptions**

You will be prompted to confirm the creation of scripts for the selected patients and regarding interactions.

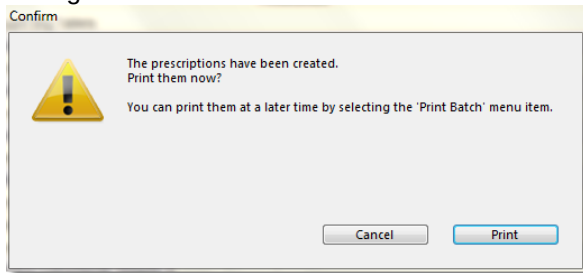


Click **OK**.

Your QuickScript list will be displayed. Select the prescription(s) and click on **OK**.



The prescriptions will be created. You will then be prompted as to whether you wish to print them now or later through **Patients > Print Batch**.

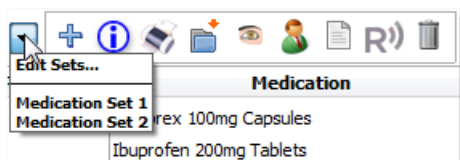


Note: You may want to also send a covering letter to these patients along with the prescription. In this case you can create a merged letter template for the currently displayed list of patients. See the [Merged Letter Templates](#) chapter for more information.

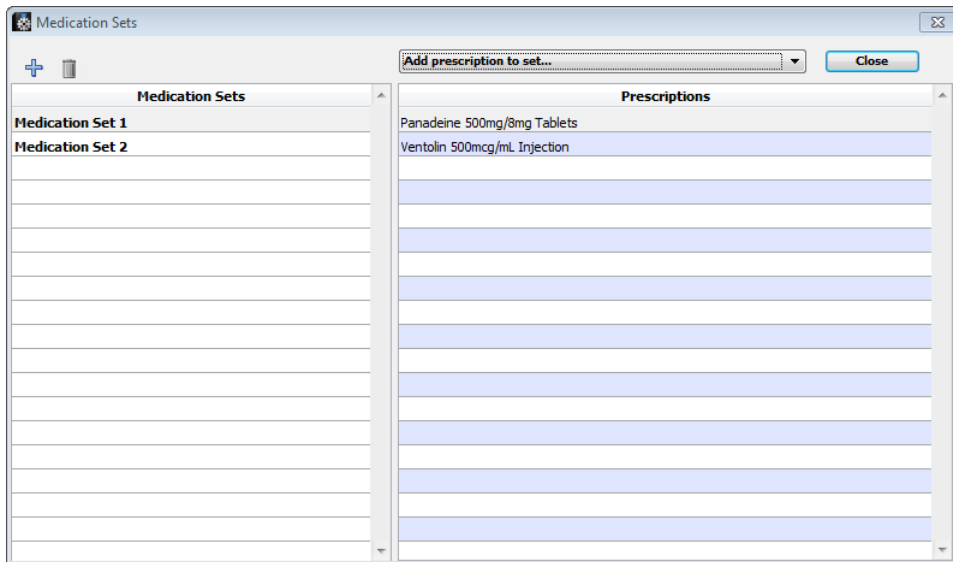
6.7.6 Medication Sets

Providers can now create Medication Sets; multiple prescriptions can be prescribed to a patient with just one click.

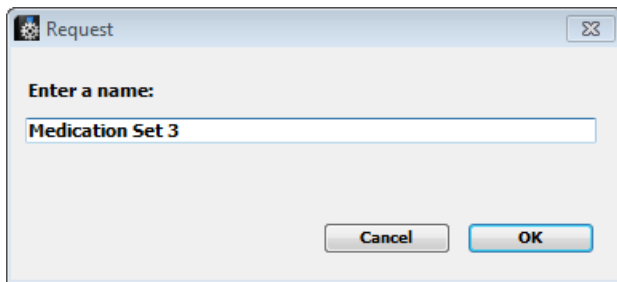
1. Go to a Patient's Clinical Window.
2. Add each item of the medication combination to their prescription list using the **Blue plus** button or *QuickScript* drop-down.
3. Once all of the medications are listed, click on the arrow button to the left of Quickscrips and select *Edit Sets*.



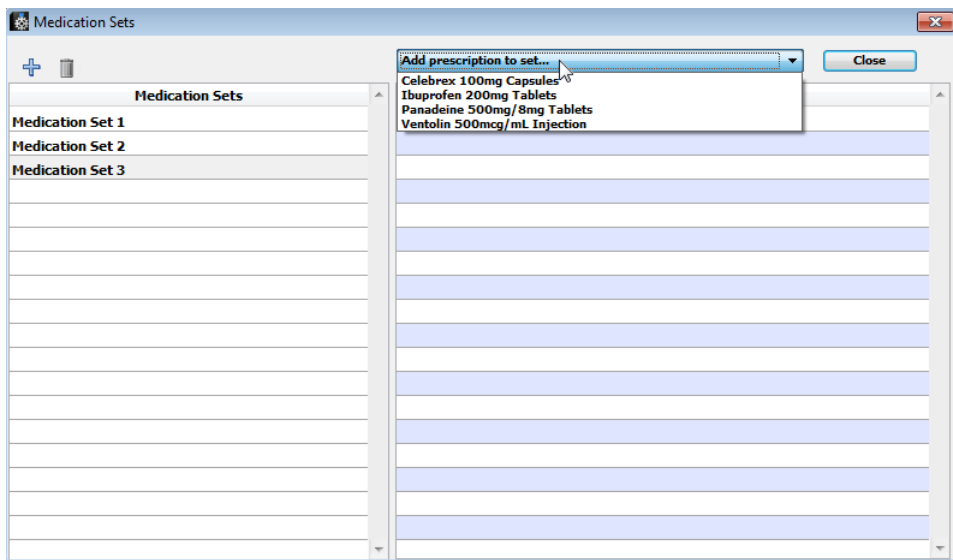
This will open the Medication Sets window. In here, you will see all of your Medication Sets listed in a pane on the left hand side. Highlighting a set will display the medications it contains in the Prescriptions pane.



5. To add a new Medication Set, click on the **Blue plus** button in this window, and enter a title for the set when prompted.



6. Select the prescriptions to add to this Medication Set by selecting them from the grey drop-down menu.



7. Once completed, Close out of the Medication Sets window. The set(s) you have created will now be available for use with any patient.

6.7.7 NPS Documents

NPS Rational Assessment of Drugs and Research (RADAR) provides timely, independent, evidence-based information on new drugs, research and Pharmaceutical Benefits Scheme (PBS) listings, to help health professionals:

- Assess how a new drug might (or might not) fit with current treatment,
- Understand how the drug compares with existing therapies,
- Understand why a drug has a particular PBS listing — if a drug is a Restricted Benefit or requires an Authority, the evidence for benefit and harm behind these restrictions is described,
- Be aware of key issues when prescribing new drugs.

NPS RADAR is published in line with updates to the Schedule of Pharmaceutical Benefits.

NPS Patient Information Leaflets (PILs) have been integrated into Genie to provide patient-relevant information that can be discussed during consultation and printed for the patient.

NPS usage statistics can be recorded with your permission as you access either RADAR or PILs. Once a month, the following information is reported to NPS:

- Names of the documents you viewed;
- How you accessed the documents (e.g. as a popup);
- When you viewed them, and for how long.

This data is submitted on a de-identified basis — in other words NPS will not be able to ascertain the identity of the person who submitted it.

6.7.7.1 NPS RADAR Document

The NPS RADAR Reviews are available through:

- An easy-to-read, condensed 'Alert',
- A detailed review for a specific drug,
- A complete list of Reviews available in Genie.

NPS RADAR Alert

When a relevant drug is being prescribed to a patient (see [Prescribing](#) for more information), if the “Enable NPS RADAR Alert” option is ticked in the User Preferences the 'NPS RADAR Alert' window will appear. This window details briefly the prescribing tips, safety notes and dosing information for this particular drug. This window will only appear for the first three times a relevant drug is prescribed. The NPS RADAR Alert will remain active for 12 months after publication.

RADAR[®]

Indacaterol
Onbrez
New drug

Chronic obstructive pulmonary disease
PBS restricted benefit

Prescribing tips

- Paradoxical bronchospasm may occur; exclude asthma and mixed airways disease before starting indacaterol treatment.

Safety

- Caution is required in people with cardiovascular disease; beta2-agonists may produce cardiovascular effects.

Dosing

- Once-daily dosing by inhalation; 1 x 150 micrograms capsule recommended.
- Do not exceed 300 micrograms.

See the [complete NPS RADAR review](#) for more details.

Close More >> What's this? ☐ Do not show NPS RADAR for this medicine again.

Clicking on the **More** Button in this window will open a detailed NPS RADAR Review window for this specific drug. Ticking the “Do not show NPS RADAR for this medicine again” option in this window will prevent the Alert from appearing automatically when the drug is prescribed again.

Detailed NPS RADAR Review

The detailed NPS RADAR Review window can be accessed from the Clinical window by clicking the NPS

RADAR  icon or through the Prescribing window by clicking on the **NPS RADAR** button.

Press 'Return' or 'Enter' to save this prescription.

Drug Interaction Checking is set at Level 1 - INCLUDES THOSE OF NO CLINICAL SIGNIFICANCE Modify

MIMS integrated 01/01/2012 - 31/01/2012 8885/1/1

Onbrez Indication Company Browse

Medication	Strength	Form	Qty	Rp...	Code	Sched	Scr...
Onbrez Breezhaler	150mcg	Powder for	[30]	5	Restricted - PBS/RPBS (NP)		Rx
Onbrez Breezhaler	300mcg	Powder for	[30]	5	Restricted - PBS/RPBS (NP)		Rx

Script: **Onbrez Breezhaler 150mcg Powder for inhalation**

Dose:

Frequency:

Instructions:

Repeats:

Reason:

Category: ☐ S: Single use, C: Core medication, R: PRN Frequent, I: Intermittent, P: PRN Infrequent, T: Trial, H: Hidden

Authority Indication:

☐ Memorise dose

Add New Drug User Added Drugs

Cancel **NPS RADAR** Add to QuickScript MIMS Abbrev MIMS Annual Save

Indacaterol (maleate); lactose; clear, colourless cap; Breezhaler device. Remove cap from blister immediately before use; inhale cap contents once daily via Breezhaler. Adults: 150 mcg/day; may incr to max 300 mcg/day

This window provides you with a detailed review of this specific drug.

NPS RADAR Documents Version 27.0

Close What's this? Online Version Medicine Update

NPS Better choices • Better health
Professional

RADAR Rational Assessment of Drugs and Research

Indacaterol (Onbrez) for chronic obstructive pulmonary disease

(IN-da-CAT-er-ol)

A once-daily beta₂-agonist for chronic obstructive pulmonary disease

Key points

- **Once-daily dosing provides symptomatic relief in COPD**
Indacaterol (Onbrez Breezhaler) once daily provides rapid onset bronchodilation in chronic obstructive pulmonary disease (COPD) lasting over 24 hours
- **Indacaterol has safety and symptom relief similar to that of twice-daily long-acting beta₂-agonist bronchodilators**
Indacaterol provides similar symptomatic improvement and greater improvement in lung function compared with salmeterol and eformoterol in COPD.
- **Indacaterol is no worse than tiotropium in safety and efficacy**
Indacaterol has been demonstrated to be non-inferior in safety and efficacy (forced expiratory volume in 1 second [FEV₁] and symptom reduction) to once-daily tiotropium.
- **Avoid indacaterol in people with asthma**
As with other inhaled long-acting beta₂-agonists, indacaterol may result in paradoxical bronchospasm; do not use to treat acute episodes of bronchospasm, acutely deteriorating COPD, or asthma.
- **Use with caution in people with cardiovascular disease**
Use with caution in people with cardiovascular disorders and in people who are unusually responsive to beta₂-agonists.

Evidence snapshot

What is known about this drug

Indacaterol is a long-acting beta₂-agonist (LABA) providing similar levels of symptom relief for people with COPD, with a similar adverse-effect profile, to that of other inhaled LABA bronchodilators.

Areas of uncertainty

The long-term clinical benefit of indacaterol is unknown as there are no data beyond 52 weeks. There are no trials investigating inhaled corticosteroids as add-on therapy in people using indacaterol in COPD. The safety of indacaterol in people with asthma and mixed airways disease

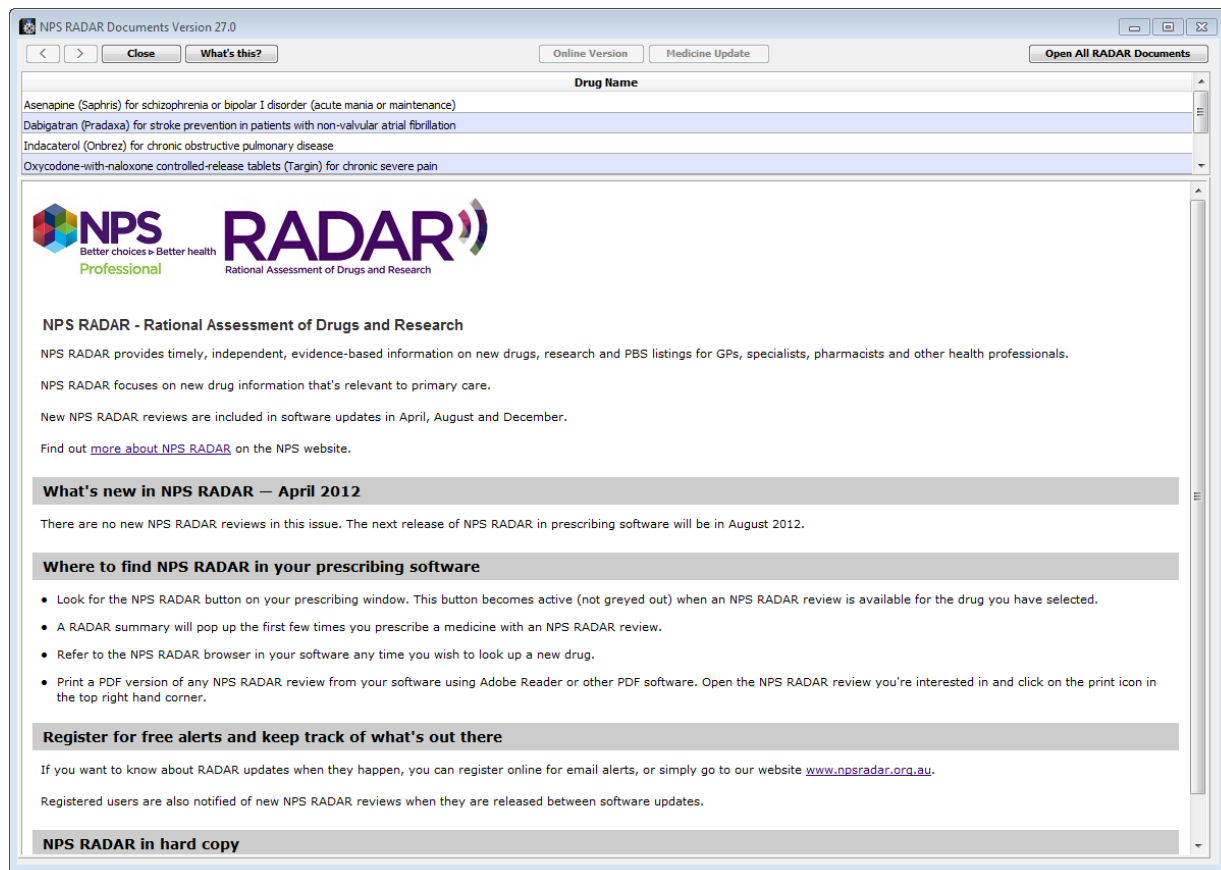
Print this article

Contents

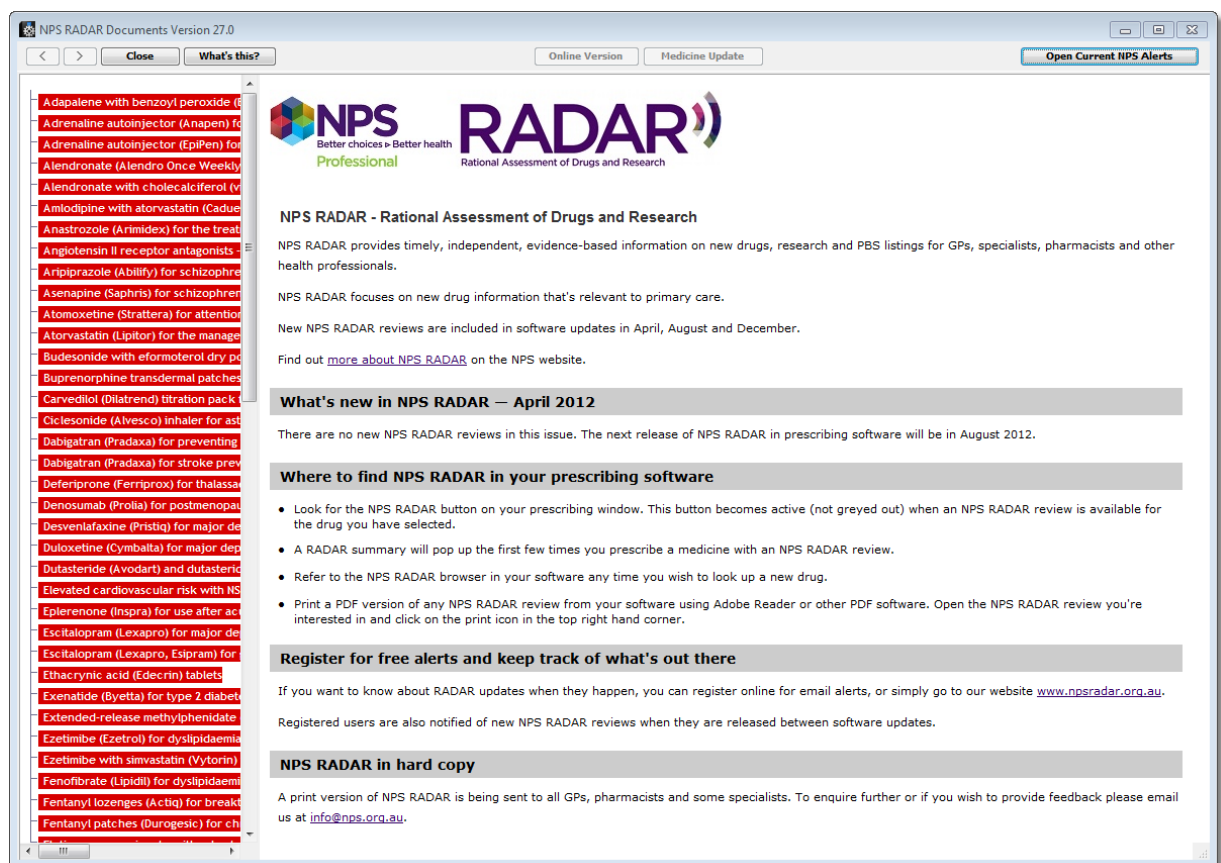
- Key points**
- Evidence snapshot**
 - What is known about this drug
 - Areas of uncertainty
 - What does NPS say?
- PBS listing**
 - Restricted benefit
 - May be prescribed by nurse practitioners
- What is it?**
- Who is it for?**
 - Do not use indacaterol in people with asthma or acute deterioration of COPD
 - Use cautiously in cardiovascular disease
- Where does it fit?**
 - Maintenance treatment for symptomatic relief in COPD
- How does it compare?**
 - Indacaterol has similar symptom relief to that of other LABAs
 - Indacaterol is no worse than tiotropium
 - No head-to-head trials of indacaterol against the combination of salmeterol with fluticasone
- Safety issues**
 - Similar adverse effects to those of other LABAs
 - Caution is required in people with cardiovascular disease
 - Be aware of possibility of paradoxical bronchospasm
 - Do not use in people with asthma
 - Interactions with other medicines
 - Do not use in combination with other LABAs
- Reason for PBS listing**
- Dosing issues**
 - No dose adjustment required in renal impairment or in mild to moderate hepatic impairment
- Information for patients**

NPS RADAR Documents

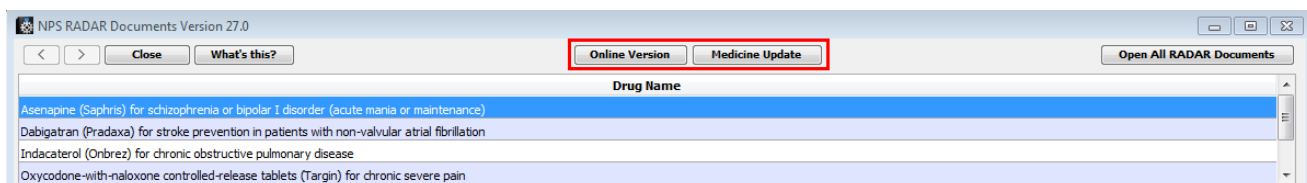
The complete list of NPS RADAR Documents can be accessed via [Open > NPS RADAR Documents](#). By default, the most recent RADAR reviews that currently have active popup alerts will be displayed in this window. RADAR reviews are current for 12 months. Double-clicking on an item in this list will display the relevant information in the preview window.



To view all NPS RADAR documents in Genie, click on the **Open all RADAR documents** button in the top left of the window. All reviews are available to be viewed by clicking on this button regardless of how long ago they were published.



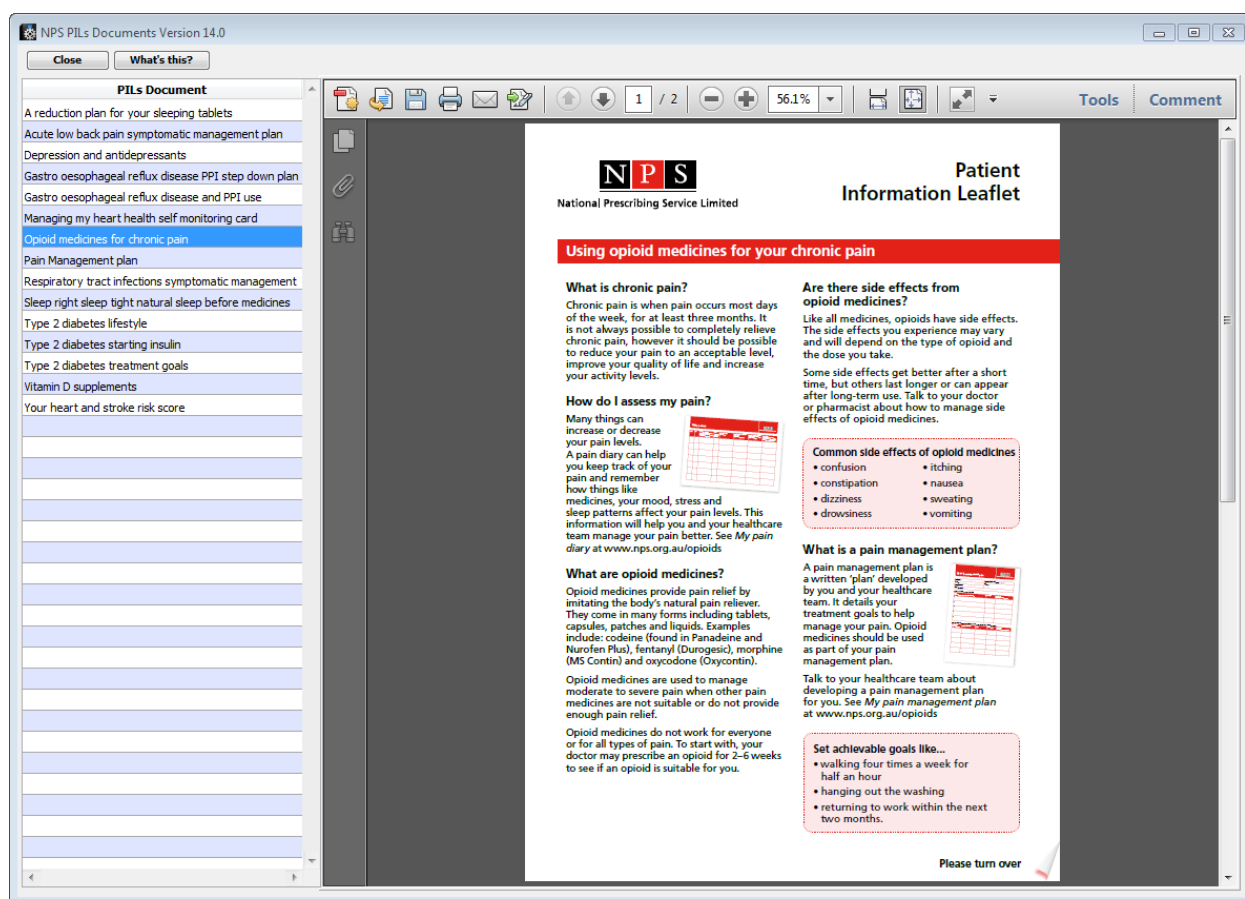
You can also access the **Online Version** and the **Medicine Update** of the selected drug if the information was made available by NPS by clicking on the respective buttons at the top of the window. **Medicine Update** provides similar information to NPS RADAR, but in a format designed and written for patients and carers.



6.7.7.2 NPS PILs Documents

Patient information leaflets (PILs) are produced by NPS to assist health professionals in communicating essential treatment messages to patients and are best used in conjunction with the patient consultation. They cover a number of topics such as Chronic Obstructive Pulmonary Disease, Type 2 Diabetes, Upper Respiratory Tract Infections, and Antibiotics. They have been designed to be complementary to the Consumer Medicines Information (CMI) leaflets which contain specific information regarding a particular medication.

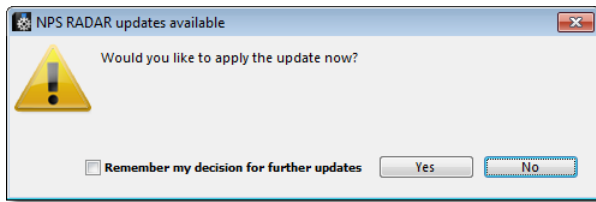
To access the NPS PILs documents, go to **Open > NPS PILs Document**. The PILs will appear as a list on the left-hand side of the window. Double-clicking the document title will allow you to preview the document on the right-hand side of the window.



6.7.7.3 Updating NPS Documents

Automatic Update

By default, Genie will check regularly for updates to NPS documents, which are then downloaded automatically. NPS RADAR updates are checked/downloaded weekly, while NPS PILs are checked/downloaded monthly. If an update is found, the following prompt will appear:



If you would like Genie to remember your decision in the future – i.e. you would like Genie to always download any updates it finds, or you want it to never do so – tick the *Remember my decision for further updates* checkbox and click **Yes** or **No** as appropriate.

Once ticked, you can change this preference via the Clinical tab of the User Preferences window (**File > User Preferences**).

Manual Update

NPS documents can be updated manually via the Software Updates window (**Special > Software Updates**). Tick the appropriate NPS download option and click **Install X Item(s)**.

Save the downloaded files to the Genie folder on the server computer. Depending on the server platform, the default location for this folder will be:

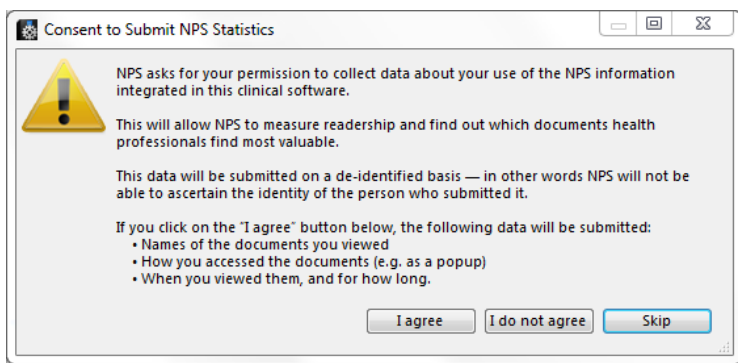
- Windows: **C:\Genie**
- Macintosh: **Macintosh HD:Applications:Genie**

Once the files have been downloaded to the appropriate folder, Genie will prompt you to install them the next time it is launched.

If the Software Updates window is inaccessible for any reason, the NPS updates can be accessed from the [Downloads](#) section of the Genie website.

6.7.7.4 Submission of Usage Statistics

The first time you access any NPS document, either RADAR or PIL, you will be asked for permission to collect data about your usage of NPS information. Data submitted to NPS includes the name of the documents you have viewed, how the documents were accessed (e.g. as a popup), when you viewed the documents and for how long.



You have the option to select:

“Skip” - Allows you to not make a choice at this time. However, you will be asked each time an NPS document is accessed until you choose to agree or not.

“I agree” - You consent and information will be recorded and submitted monthly to NPS. .

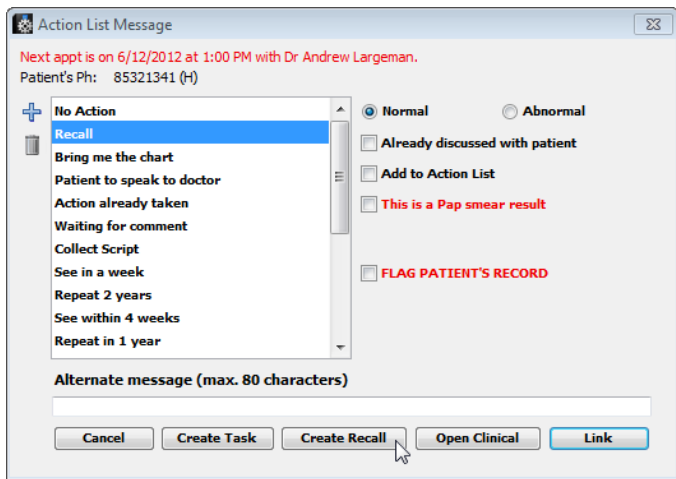
“I do not agree” - You do not consent and information will not be recorded or submitted to NPS.

If you change your mind, you can change your choice in the **Clinical** tab of the User Preferences window.

6.8 Recalls

Recalls can be added from:

- The Clinical Window, by clicking on the **Recalls** button .
- The Patients List, by selecting **Patients > Add a Recall**.
- The Appointment Book, by selecting **Appts > Add a Recall** or,
- The Pathology Action List window when linking pathology results.



Action List Message

Next appt is on 6/12/2012 at 1:00 PM with Dr Andrew Largeman.
Patient's Ph: 85321341 (H)

☒ Normal ☐ Abnormal

☐ Already discussed with patient

☐ Add to Action List

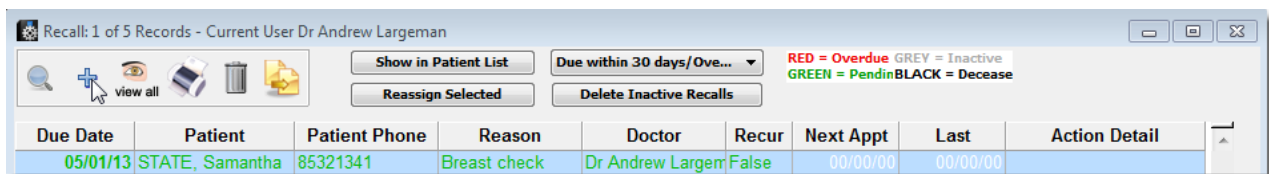
☐ This is a Pap smear result

☐ FLAG PATIENT'S RECORD

Alternate message (max. 80 characters)

Buttons: Cancel, Create Task, Create Recall, Open Clinical, Link

When adding a recall from the Pathology & Radiology list, or from within the Clinical Window, a list of recalls already in existence for that patient will be displayed.



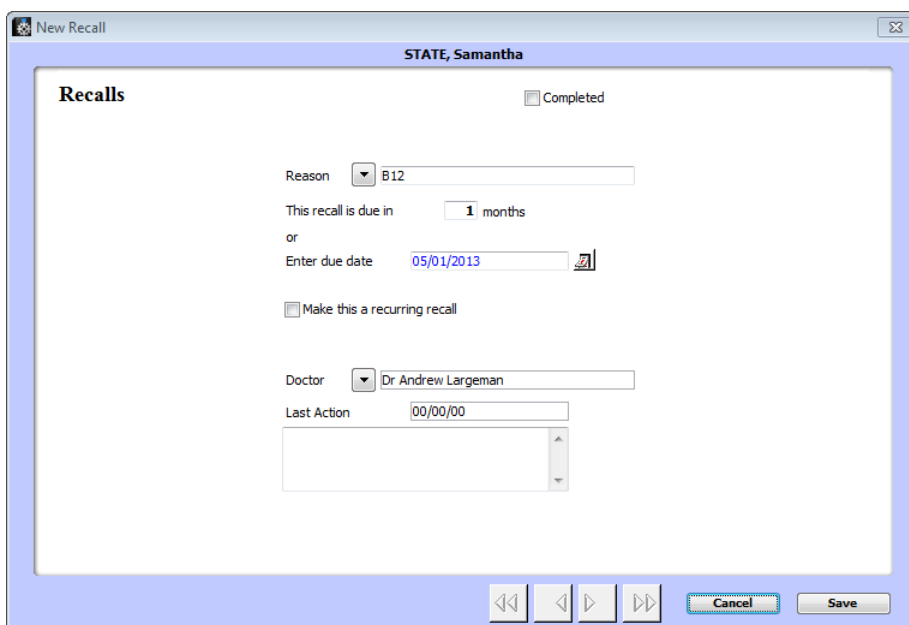
Recall: 1 of 5 Records - Current User Dr Andrew Largeman

Buttons: Show in Patient List, Due within 30 days/Ove..., Reassign Selected, Delete Inactive Recalls

Legend: RED = Overdue, GREY = Inactive, GREEN = Pending, BLACK = Deceased

Due Date	Patient	Patient Phone	Reason	Doctor	Recur	Next Appt	Last	Action Detail
05/01/13	STATE, Samantha	85321341	Breast check	Dr Andrew Largeman	False	00/00/00	00/00/00	

Click on the **Add** button as shown above to create the new recall record, which will open the window below.



New Recall

STATE, Samantha

☐ Completed

Reason: B12

This recall is due in: 1 months

or

Enter due date: 05/01/2013

☐ Make this a recurring recall

Doctor: Dr Andrew Largeman

Last Action: 00/00/00

Buttons: <<, <, >, >>, Cancel, Save

Note: If you are receiving an error message stating that you cannot create a recall from here, you have not accessed recalls from the Pathology & Radiology window or Clinical Window.

In this window, you can enter the reason for the recall by either typing it into the *Reason* field, or by selecting it

from the drop-down menu to the left of this field. If you type a reason in manually, Genie will ask you whether you wish to add it to the list of recall reasons available from the drop-down menu. To remove a reason from this list, open the drop-down menu and Alt+click on the reason you wish to remove.

Enter the Due Date by specifying the number of months ahead, or by entering the actual date or if this is going to be a recurring recall, select the *Make This a Recurring Recall* checkbox, and enter the frequency in months. This will reassign the recall to its next due date after it is printed, so you do not have to keep adding the patient to the recall list. Click the **Save** button to save the record.

Flagging of Patient Record

When recalls are printed (see [Printing Recalls](#) in Reception Module), the patient record is automatically flagged. If the recall is currently overdue, then the Flagged Date is set to one week ahead. Otherwise, the Flagged Date is set to one week after the recall is actually due.

When a User enters a flagged patient file, they will be notified that it is flagged and be provided with the flag reason. After the flagged date has passed, the user that the recall is assigned to will be notified by the **Overdue Patients** notifier in the Navigation Palette. Flagged patients can be viewed at anytime through **Patients > Flagged Patients** in the Patients List (**Open > Patients**).

6.9 Checklists

Checklists within Genie are a method for creating your own unique forms for data collection. They can be used to quickly and easily collect consultation notes, physical exams, pre-operative checks, and operation reports.

Below is an example checklist:

Mrs Amanda FRANKLIN - Examination Report - 29/09/2014

Patient: Mrs Amanda FRANKLIN
Date: 29/09/14
Provider: Dr Miranda Lawson

Examination Report

Select the type of field to add

00/00/00 00/00/00 Link to Proc Upload

Examination

Site of Injury
Side
Bilateral
Level of Pain 0 > 10 (10 = Worst Pain)
Previous Similar Injury
Details of previous injury
Date of Onset
Duration of symptoms
Onset
Mechanism of Injury
Symptoms
Special Symptoms
Treatment Received to date
Investigations to date
Scan

Right Left
Yes No

Format

00/00/00

Load
Clear
Compress
Draw

Review Required

Review Required
Physician For Review
Date of Next Appointment

Yes No

Format

00/00/00

6.9.1 Creating a Checklist

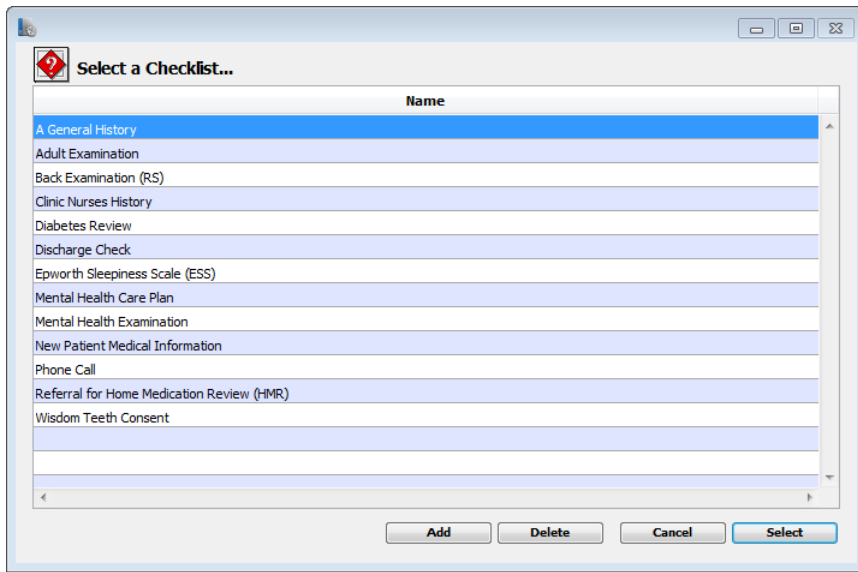
To create a new checklist template:

1. In the **Other** or **Checklists/Script Archive** tab of the Clinical record, click the **Add Record**  button next to the word 'Checklist'.

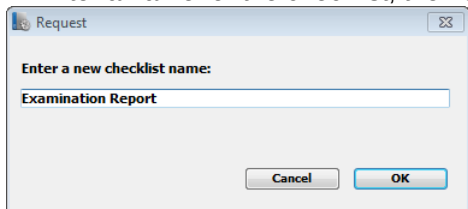
CHECKLISTS  

Date	Checklist
23/10/2014	Examination Report

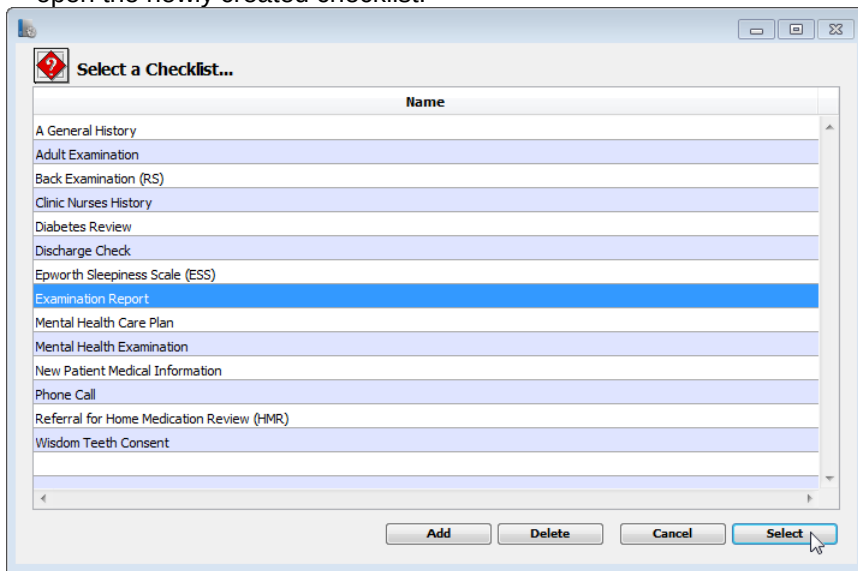
This will display a list of the checklists you current have available. Click on the **Add** button to create a new checklist template. Alternatively, if you no longer use a checklist you can delete it by clicking the **Delete** button.



2. Enter a name for the checklist, then click **OK**.



3. The new template will be added to the list and should automatically be highlighted. Click the **Select** button to open the newly created checklist.



4. To add a field, click on the required field button and then click the **Add New Field to Checklist**  button. For example, to add a text field, click on the **Text Field** button, then click the **Add New Field to Checklist** button. The text field will now be added to the checklist.

You can add the following fields to the checklist:

- a) Text field
- b) Number field
- c) Checkbox
- d) Radio button
- e) Date field
- f) Picture field
- g) Large text field
- h) Break heading

To remove a field from the checklist, click the **Delete Field from Checklist** button and select the field you want to delete from the drop-down menu.

To change the name of the field label, click in the area with the blue background (e.g. Text 1) or pink background for break headings, and then type the name that you require.

Clicking on the **Menu** button brings up a menu which allows you to select options to make data entry faster.

The *Add to Menu* option allows you to add options specific to that field so that it can be selected rather than typed. Items can be removed from this list by holding down the **Alt** key on your keyboard and clicking on the item you want to remove.

The *Field Reference* option allows you to select a Patient field so that patient specific information is automatically entered when this checklist is added to the patient's clinical record. Fields that contain a reference are coloured green and if you hover your mouse over the field, it will show you what field is being referenced (e.g. [Patient] FullName).

The *Clear Field Reference* clears information that is currently entered into the field.

If you add a *Radio Button* field, by default it displays the choice of "Yes" and "No". This can be changed by clicking on the **Format** button, entering the relevant options in the *Choice 1* and *Choice 2* fields and clicking **OK**.

The **Change Order** button allows you to rearrange the order of the fields that appear in the checklist. Click and drag the field into the required position and then click **Save**.

☐ Enabled for GenieWeb

Field Order
Please choose the order of the fields below:

Fields
Examination
Site of Injury
Side
Bilateral
Level of Pain 0>10 (10 = Worst Pain)
Previous Similar Injury
Details of previous injury
Date of Onset
Duration of symptoms
Onset
Mechanism of Injury
Symptoms
Special Symptoms
Treatment Received to date
Investigations to date
Scan

Cancel Save

5. Once you are happy with how the checklist appears, click the **Save** button.

Note: The checklist will save the template and also save a copy of the checklist to the patient's clinical record. If you do not want it to save to a real patient's record while you are creating the template, use a test patient in your database. Alternatively, you can delete the checklist from the patient's record by selecting the checklist and clicking the **Delete**  button in the **Other or Checklists/Script Archive** tab.

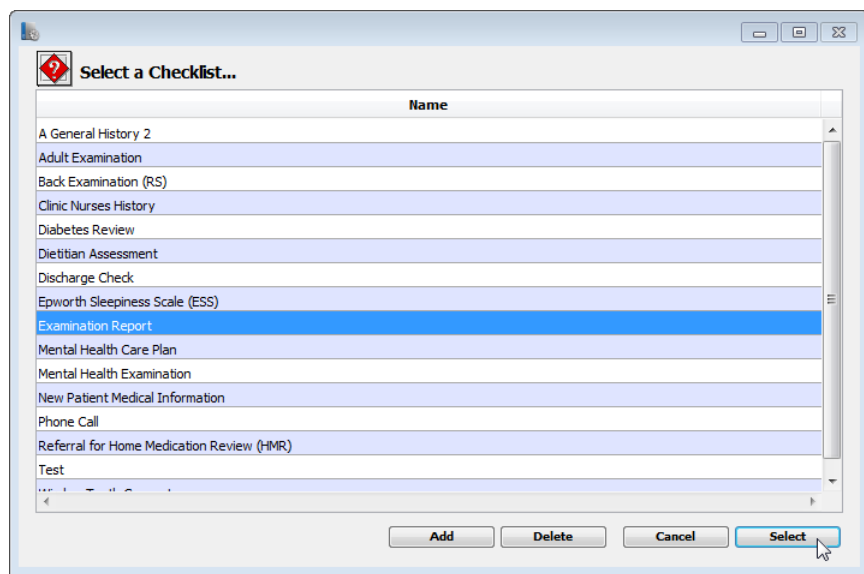
6.9.2 Using Checklists

Once the checklist template has been created, you can add it to a patient's record and enter information specific to that patient. Checklists can be added from three different places:

1. The **Other or Checklists/Script Archive** tab in the Clinical Window.
2. The Add Consult window in the Clinical Window.
3. The **Op Notes** tab within a Procedure record.

To add a checklist for a patient:

1. Click the **Add Record**  button in the Clinical window or Procedure record, select the template that you require and click the **Select** button. From the Add Consult window, click the *Checklist* drop-down menu and select the relevant checklist.



2. Enter the information into the fields by typing, selecting or using the **Menu**  button. If you have used a Field Reference in one of the fields (see [Creating a Checklist](#)), the patient's information should appear automatically.

If you have a *Picture Field* in your checklist, you will have four buttons available to you:

Load	Allows you to select an image that you have stored on your computer.
Clear	Clears any image that has previously been loaded into the checklist.
Compress	Allows you to adjust the image quality.
Draw	Opens the Drawing Module so that you can add notations to the image.



The **Print Checklist**  button will open the checklist in a 4D Write window so that you can print the checklist by going to **File > Print...** If you hold down the **Alt** key on your keyboard and click the **Print Checklist** button, it will include your letterhead on the printout. If you have more than one practice, or doctors who have their own individual letterheads, a window will appear asking you to select the relevant letterhead.



The **Lock Checklist**  button allows you to lock a checklist to prevent future changes being made to it. A checklist would normally only be locked if you required it to become a medico-legally valid record (e.g. an operation report). Once a checklist has been locked, it can no longer be edited. However it can be deleted from the patient's clinical record. When you click the **Lock Checklist** button and click **Save**, an alert will appear confirming if you want to lock this record. When you next open this checklist, you will see that the lock icon is



now closed  and the date it was locked is displayed below it.

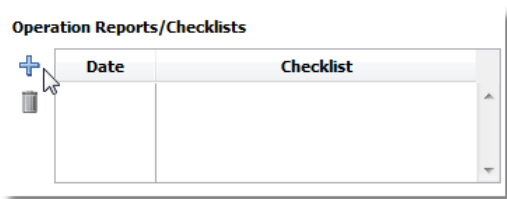
Note: This only locks the information in the checklist for this particular patient. The checklist template itself can still be edited and changed.



The **Link to Procedure**  button allows you to link the checklist to a procedure in the patient's clinical record. When you click the **Link to Procedure** button, you will be asked to select the relevant procedure to link the checklist to. A checklist that has been linked to a procedure will display a paperclip icon next to the **Link to**



Procedure  button. Once a checklist has been linked to a procedure, it can be accessed from the **Op Notes** tab of the specific procedure record. Checklists can also be added directly in the **Op Notes** tab by clicking on the **Add Record** button.

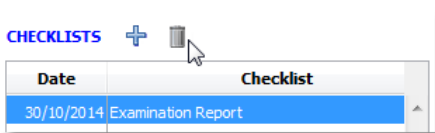


If a checklist has been linked to a procedure, when you click on the procedure in the contact list of the Clinical window, it will display the information entered into the checklist in the Operation Report by default. If you want to see the default information that appears if no checklist has been added (i.e. information typed in the **Op Notes** tab of the procedure record), hold down the **Ctrl** key on your keyboard and click on the procedure record from the contact list.

To unlink a checklist from a procedure, hold down the **Alt** key on your keyboard and click the **Link to Procedure** button.

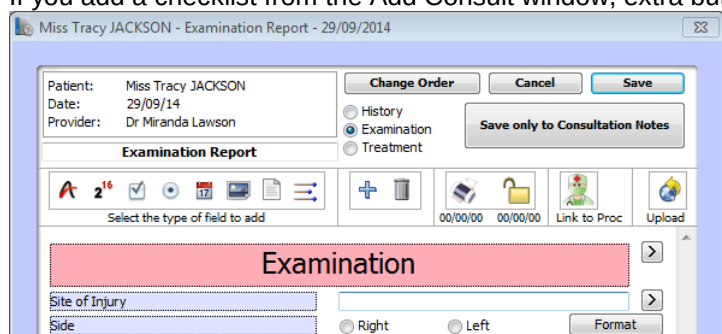
3. Once you have entered all the information that you require, click **Save**.

You can delete the checklist from the patient's clinical record by selecting the checklist and clicking the **Delete** button.



Adding from Consultation

If you add a checklist from the Add Consult window, extra buttons will become available to you.



The **History**, **Examination** and **Treatment** radio buttons allow you to specify which field in the consult window you would like the checklist information to appear.

The **Save only to Consultation Notes** button gives you the option to transfer the checklist information to the selected field in the consult window without saving a copy of the actual checklist to the patient's clinical record. If you want a record of the checklist in the clinical record as well as in the consultation notes, you should click the **Save** button instead.

6.9.3 Editing Checklists

Editing Checklist Templates

Once you have created a checklist template, you can add additional information or make changes to the existing checklist template. Editing will overwrite the checklist template that appears when you add a checklist to the patient's record.

Note: This will only affect checklists added in the future. It will not change the checklists that have previously been added to a patient's clinical record.

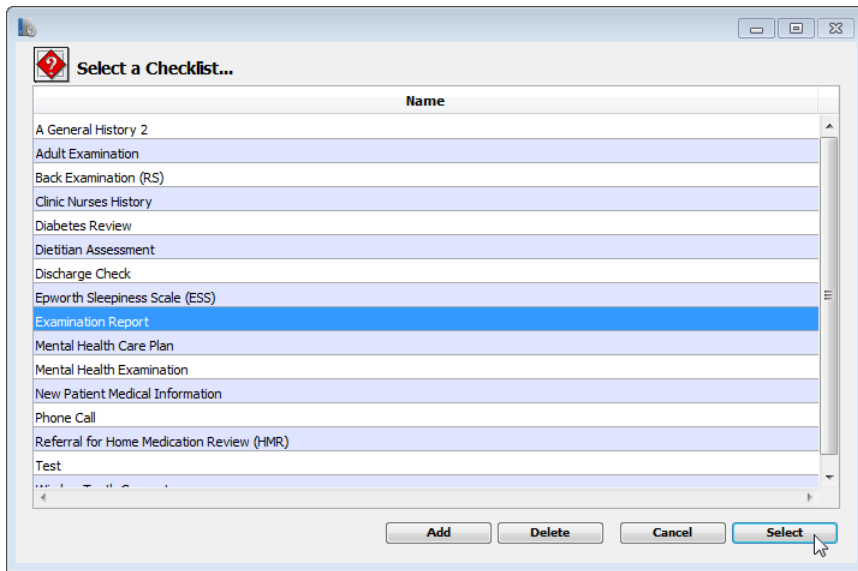
To edit a checklist template:

1. In the **Other** or **Checklists/Script Archive** tab, click the **Add Record**  button next to the word 'Checklist'.

CHECKLISTS  

Date	Checklist
23/10/2014	Examination Report

2. Select the template that you want to edit and click the **Select** button.



3. Make the required changes to the fields and click **Save**.

Note: The checklist will save the template and also save a copy of the checklist to the patient's clinical record. If you do not want it to save to a real patient's record while you are creating the template, use a test patient in your database. Alternatively, you can delete the checklist from the patient's record by selecting the checklist and clicking the **Delete**  button in the **Other** or **Checklists/Script Archive** tab.

Editing Patient's Checklist

To edit the information in a checklist for a specific patient:

1. In the **Other** or **Checklists/Script Archive** tab, double-click on the checklist you want to edit.

CHECKLISTS  

Date	Checklist
30/10/2014	Examination Report

2. Make the required changes to the information entered into the fields and click **Save**.

6.9.4 Uploading/Downloading Checklists

Once you have created a checklist template, you can upload it to the Genie Web Server so that other Genie users may download and use your template. You can upload a Checklist template by clicking on the **Upload**



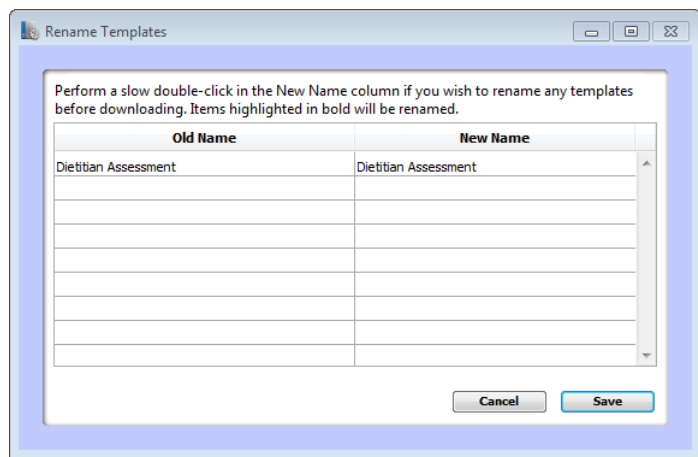
Upload button. Conversely, you can download templates created by other Genie users.

Genie version 8.6.4 and below:

Go to **Special > Get Checklists**. This will open the Checklist window where checklists are grouped under specialties. Click the small plus  icon to the left of the relevant speciality, double-click on the checklist you would like, type a name for the checklist in the window that appears and click **OK**. This checklist will now be available in the list of checklists when you click the **Add Record**  button.

Genie version 8.6.5 and above:

Go to **Special > Software Updates** and click on the **Checklists** tab. Click the small plus  to the left of the category you require, tick the checkbox to the right of the checklist that you want and click the **Import X Item/s** button. A window will appear allowing you to rename the template before you download it.



To change the name, slow double-click in the *New Name* column, type the name and then click **Save**. This checklist will now be available in the list of checklists when you click the **Add Record**  button.

Note: These checklists are created by other Genie users so they may not be accurate or contain any information as they may have been inadvertently uploaded. Genie Solutions does its best to minimise these 'blank' checklists on the Genie FTP Site but cannot always guarantee that there will not be any.

6.10 Pathology and Radiology

Set Up

You must contact your Pathology and Radiology providers to set up their company specific software and to supply you with their computerised request forms. The download software should ideally be installed on a client machine. However if this is not feasible, it can be installed on the server.

The directory into which downloaded results should be deposited is the LabRsIts folder within the Genie folder:

- On Windows the pathway will usually be: **C:\Genie\LabRsIts**
- On Macintosh the pathway will usually be: **/Applications/Genie/LabRsIts/**

6.10.1 Ordering Pathology

To order pathology click on the **Pathology** button at the top left of the patient's Clinical Window or press **Ctrl+L**.

The following window will open:

Select the Pathology laboratory you wish to send the patient to using the *Laboratory* drop down list at the top of the window. Pathology laboratories can be added by selecting *New Provider...* from this list. You can set the default provider i.e. the company you refer to most by selecting *Set Default...*

Doctor Code: is set by the laboratory and only needs to be entered once and Genie will remember it for that company.

Note: Once you have added the Pathology company, you cannot change the details associated with it, ie. laboratory, address and telephone. If these details change, delete the provider from the list (Alt+click on the entry to be deleted) and then re-add the Pathology Company with the new details.

To order a test, scroll through the list on the left and find the test you need or type the test into the field above the list to find it. When searching in this manner, the wildcard character @ can be used as a substitute for one or multiple other characters. To add the selected test into the request box in the middle, you can double-click the test, drag and drop it into the box, or highlight it and click the green arrow. Right-click any test to add it to the Favourites list for quick selection.

If the test is not in the list at left you can add it with the **Blue Plus** button. Tests that you may never use can be deleted altogether by highlighting the test and clicking the **Garbage Can** button at the top of the list.

If you have added a test to the list of requested tests by mistake, either double click on it to remove it or highlight it and click the **Garbage Can** button next to the *Sets* drop down list.

A reason for the test can be added by typing directly into the *Reason* field or via the *Reason* drop down menu. Alternatively, you can use the **Procedure Info** button to automatically insert the name and date of the patient's last Procedure into the *Reason* field.

There are several checkboxes in this window that allow you to specify the patient's *Fasting*, *Pregnant* and *HRT* statuses.

The patient's billing status can be specified by selecting the relevant radio button from *Private*, *Concession* and *Direct Bill*.

Copies will automatically be sent to the referring doctor if *Copy Results to Referrer* is ticked in your User Preferences (**File > User Preferences**). Otherwise, copies can be sent to any doctor(s) in your Address Book by

clicking the **Copies to...** button.

Ticking *Do not send reports to My Health Record* allows the patient to opt out of having their Pathology reports uploaded to their My Health Record.

If your pathology stationary has labels on it, tick the *Print Labels* tickbox which will format the request to print the patient information on these labels.

If the investigations being requested are *Cervical Screening Tests (CST)*, tick this checkbox. Doing so will open the window below, allowing you to specify relevant information about the investigation(s).

Creating Pathology Sets

For commonly ordered sets of tests you can create a Pathology Set so you will only need to select the Set from the Sets drop down list and it will slot in the appropriate tests you have set up. There are quite a few default Sets already set up in the drop down list which can be deleted or modified as appropriate.

To create a set, drag all required tests for the set into the request box. Select *Save Set...* from the Sets drop down list and give the Set a name as prompted.

Reprinting Request Forms

Request forms can be reprinted using the **Last Request** button in the request window or through **Open > Investigations Audit**. In Investigations Audit, find the request that needs to be reprinted, double click to open the request window and click the **Reprint** button at the bottom of this window.

Investigation: 6 of 6 Records - Current User Dr Andrew Largeman

Template: Standard

Ix Provider Sullivan & Nicolaides

Patient Name Citizen, Jane

Requested By Dr Miranda Lawson

Request Date 05/04/2012 Ref GEN00001_3

Test Iron Studies

Reason Lethargy

Copies To

Reprint Open Patient Delete Cancel Save

Note: When reprinting a request, a prompt will appear asking if you would like reprint the labels.

Pathology Templates

If a pathology template needs to be moved in any direction as a whole, use the green/blue **arrows** at the top right of the request window.

To adjust an individual field in a pathology template click the *Edit Templates* drop down menu at the bottom of the request window and select the template to edit (usually *Standard Pre-printed*).

Fields can be moved by clicking and dragging them to the desired position and resized by dragging the blue dots accordingly.

vO_Letterhead

[Radiologist]XRayCompany
[Radiologist]Radiologist
[Radiologist]Address1 [Radiologist]Address2

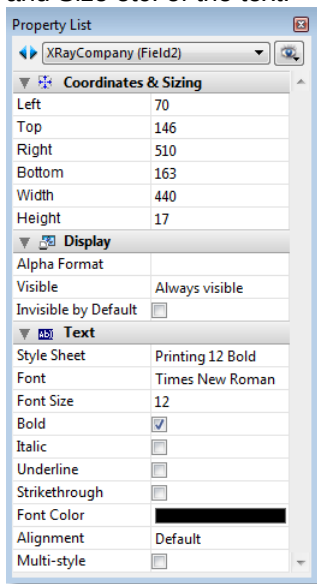
Our Ref: [Investigation]Testid

Patient Details:
<[Patient]FullName>
<[Patient]AddressLine1> <[Patient]Suburb>
<[Patient]Postcode>
DOB: [Patient]DOB DVA No: v\MedicareNo [Patient]DvaNum
Ph: v\PhoneNo

Thank you for performing: [Investigation]Test Our Reference: [Investigation]Test

To remove a field from a template, click and drag it off the printable area.

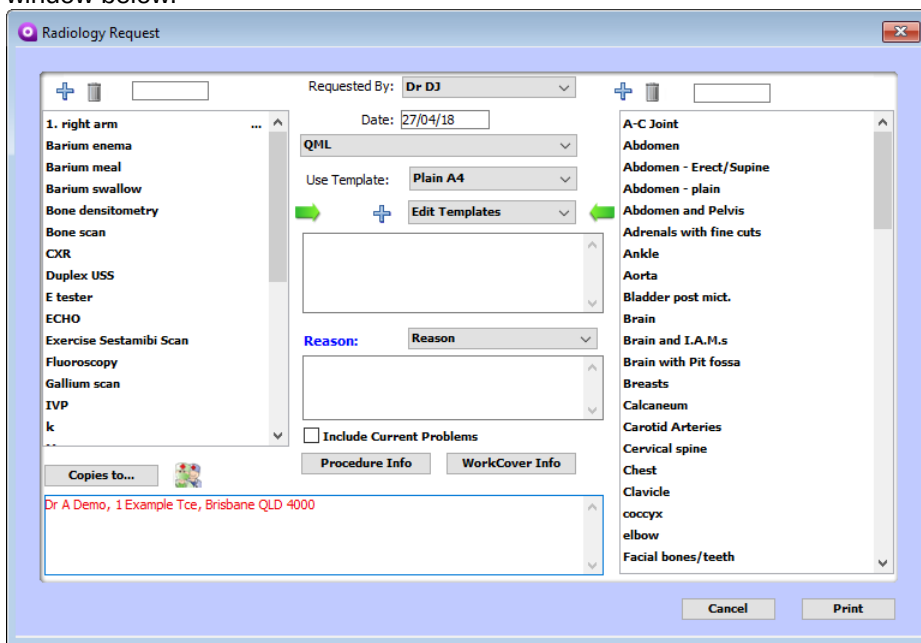
To edit the Text Properties in a field, double click and a Properties list will appear with options to adjust the Style and Size etc. of the text.



Be sure to Save the Template before closing using the **Save** button . The previously saved template can be restored by clicking the **Revert** button .

6.10.2 Ordering Radiology

To order radiology, click the **Radiology request** button  in the patient's Clinical Window. This will open the window below.



Select the Radiology company you would like to use in the drop-down list under the *Date* field (in the example above, QML is selected). Radiology companies can be added by selecting *New Provider...* from this list. You can set the default provider i.e. the company you refer to most by selecting *Set Default...*

Note: Once you have added the Radiology company, you cannot change the details associated with it, ie. Company name, address and Radiologist. If these details change, delete the provider from the list (Alt+click on the entry to be deleted) and then re-add the Radiology company with the new details.

Select the print template you wish to use from the *Use Template* drop-down list. Plain A4 is the most commonly used otherwise Custom templates in the *Edit Templates* drop-down can be used for your common radiology providers. See [Radiology Templates](#) below. Using a particular template with a radiology provider associates that template with that provider. Therefore, if you use Plain A4 for QML this time, Genie will automatically select *Plain A4* next time.

To order a test from the list of tests at left either scroll through and find the test you need, or alternatively type the test into the blank box at the top of the list to find it. You can double-click the required test to move it into the request box in the middle of the window, or you can drag and drop the test into the request box.

Double-click (or drag and drop) the region required from the list at right, as above, which will place it in the request box after the test ordered. You can also type additional information into the request box eg. left or right, by simply clicking into the box and typing what is required.

If the test or region is not in the list you can add it with the **Blue Plus** button. Tests or regions that you may never use can be deleted altogether by highlighting the test or region and clicking the **Garbage Can** button at the top of the list. Alternatively, you can simply highlight and press **Delete** on your keyboard.

The **Procedure Info** and **Workcover Info** buttons allow you to add information from either or both of these records into the *Reason* field.

Copies will automatically be sent to the referring doctor if *Copy Results to Referrer* is ticked in your User Preferences (**File > User Preferences**). Otherwise, copies can be sent to any doctor(s) in your Address Book by clicking on the **Copies to...** button.

Ticking *Do not send reports to My Health Record* allows the patient to opt out of having their Radiology reports uploaded to their My Health Record.

Reprinting Request Forms

Request forms can be reprinted through **Open > Investigations Audit**. Find the request that needs to be reprinted, double-click to open the request window and click the **Reprint** button at the bottom of this window.

Investigation: 6 of 6 Records - Current User Dr Andrew Largeman

Template: Standard

Ix Provider Sullivan & Nicolaides
Patient Name Smith, John
Requested By Dr Miranda Lawson
Request Date 05/04/2012 Ref GEN00001_2

Test Throat swab

Reason

Copies To

Navigation: Previous, First, Last, Next

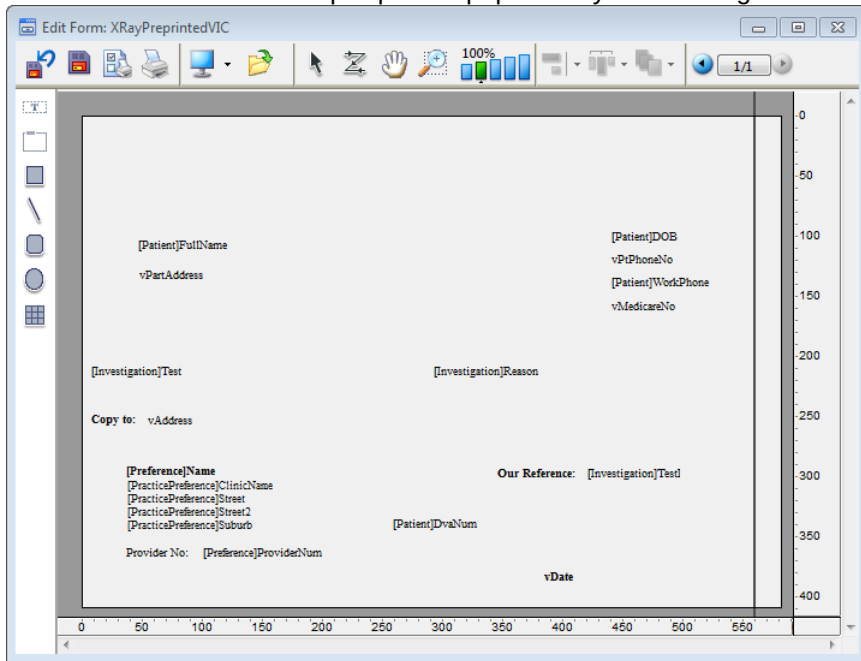
Buttons: Reprint, Open Patient, Delete, Cancel, Save

Radiology Templates

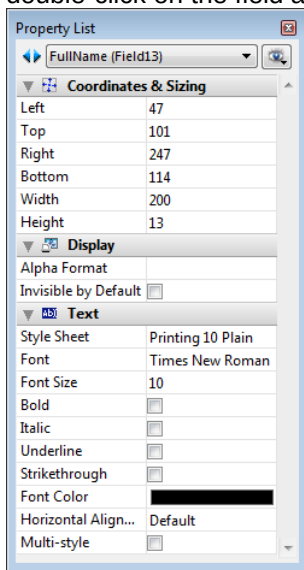
Unlike pathology companies, radiology companies do not have a standard pre-printed form (except in Victoria and South Australia). This means that templates need to be set up or created to suit the radiology companies that you use. Genie comes with some default radiology templates in the *Edit Templates* drop-down menu that you can use and customise. You can also create new radiology templates if you use multiple companies with different pre-printed request forms.

Note: If a radiology company does not use a pre-printed form, using the Plain A4 template will print the request details with your letterhead.

For the default radiology templates in Genie, fields can be moved by clicking and dragging them to the desired position and resized by dragging the blue dots accordingly. You should experiment with the size and position of these fields until it suits the pre-printed paper that you are using.



To remove a field from a template, click and drag it off the printable area. To edit the properties of a field, double-click on the field and the Properties List will appear with options to adjust the settings of the text.



Save any changes to the template by clicking the **Save**  icon. The previously saved template can be restored by clicking the **Revert**  icon.

To add a new radiology template, click the **Add Record**  icon next to the *Edit Templates* drop-down menu. In the window that appears, select which format you would like the date to appear on this template and click **OK**. In the X Ray Template window, edit the template until the placement of the fields match the pre-printed paper. This window functions in the same way as the Merged Letter Template window so for instructions on how to use this window, see [Merged Letters](#). Once the template is the way you want it, type a name for the template in the *Title* field and click **Save**.

If you already have a radiology template that is similar to another you have create in Genie, you can save a copy of the template and import it into a new radiology template. To save a copy of an existing template, select the

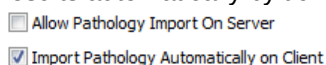
template from the *Edit Templates* drop-down menu, above the template area, select **File > Save As...** and navigate to a familiar location on your computer. Give the template a name and then click **Save**. The template will be saved in 4W7 format.

To import this into a new template, in the Radiology Request window, click the **Add Record** button, above the template area select **File > Open**, navigate to the location that you saved the template, select it and click **Open**. You can now edit the template until it suits the pre-printed paper. Once the template is the way you want it, type a name for the template in the *Title* field and click **Save**.

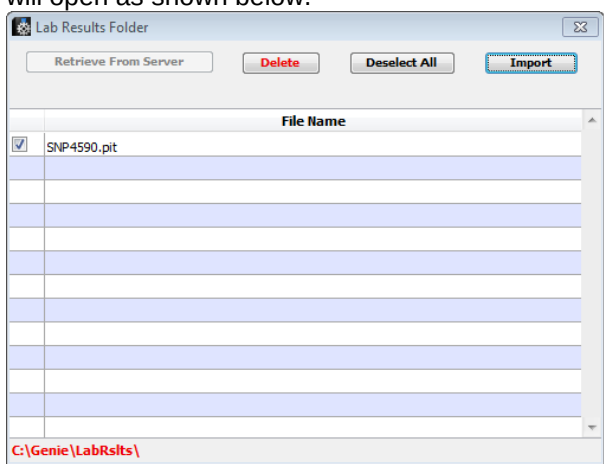
6.10.3 Importing Downloaded Results

Results are downloaded into the LabRslts folder by the respective laboratory's software. From this folder, these result files can then be imported into Genie automatically (or manually, if need be).

If results are set to download to a Client, tick '*Import Pathology automatically on a Client*' in Practice Preferences (**File > Practice Preferences, Clinical** tab). If they are set to download on the server, then Genie can import the results automatically by ticking '*Allow Pathology Import On Server*'.



If you would prefer to do the import manually, go to **Open > Pathology and Radiology** on the client machine that has the laboratories' download software on it. If there are any new result files to import, the Import window will open as shown below.



All results will be ticked by default, if you wish to import only a few of the results listed you can click the **Deselect All** button and tick just the required result.

Click the **Import** button and Genie will import the downloaded files into the database. Once the import is finished these results can be accessed by anybody on the network.

Troubleshooting

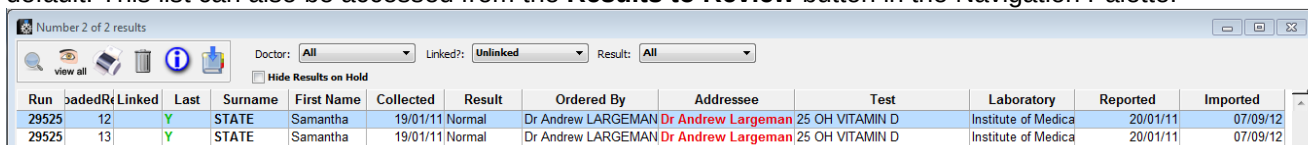
If Genie finds any problems with the downloaded file, you will receive a message saying that the file is not a valid results file. Usually this is because it has not been decrypted, is not actually a results file at all, or there is a problem with the PIT/HL7 formatting from the laboratory. Although HL7 is a 'standard', it is a very loosely defined and interpreted standard and some laboratories may format results in ways that Genie does not expect. Any invalid results will go into the folder named 'Invalid Results' in the LabRslts folder.

If you are experiencing problems automatically importing results, the above Import window can be opened from

the Downloaded Results list (**Open > Pathology and Radiology**) by clicking on the **Import** button . Results that are imported to the server can be retrieved from the server by clicking the **Retrieve From Server** button. This will copy any results in the LabRslts folder on the server to the local LabRslts folder. If the retrieval is successful, the copied results are also placed into a folder called 'ArchivedResults' inside the Genie folder on the server, in case you would like to try importing them again.

6.10.4 The Downloaded Results List

The Downloaded Results list ([Open > Pathology & Radiology](#)) displays all Unlinked results for all providers by default. This list can also be accessed from the **Results to Review** button in the Navigation Palette.



Run	Surname	First Name	Collected	Result	Ordered By	Addressee	Test	Laboratory	Reported	Imported
29525	STATE	Samantha	19/01/11	Normal	Dr Andrew LARGEMAN	Dr Andrew Largeman	25 OH VITAMIN D	Institute of Medica	20/01/11	07/09/12
29525	STATE	Samantha	19/01/11	Normal	Dr Andrew LARGEMAN	Dr Andrew Largeman	25 OH VITAMIN D	Institute of Medica	20/01/11	07/09/12



The **Find** button allows you to search the entire results list by Surname, First name or test name.



The **Print** button allows you to print out the list of displayed results in QuickReport format (For more information see [QuickReports](#)).



The **Info** button will display the run numbers received by each laboratory for the last 30 days. Use this button if you receive a message that you are missing a run number. Check to see if the run number really is missing. If it is, you should call the lab and ask them to resend it.



The **Import** button will open the Import window and display the contents of the LabRsIts folder on this computer.



The **Delete** button will delete the highlighted results.

Note: Deleting a result will permanently delete the result from your data file, this includes the patient's Clinical Window, so use this button with caution!

The *Doctor* menu allows you to select just your own results for linking. This menu is built when the window is first opened. If your name isn't here, you don't have any results to view.

Note: There may be several variations in the formatting of the providers' names in this list. This is due to variations between Laboratories in the way the providers' names are recorded. If you would like consistency, contact each Laboratory and request your desired format.

The *Linked* popup menu allows you to quickly shift between displaying Linked, Unlinked or All results.

The *Result* popup menu allows you to quickly shift between displaying Normal, Abnormal or All results.

Note: It is the Laboratory that marks a result as Normal or Abnormal. Not all labs do so. If you disagree with how the result is marked, speak to the laboratory responsible.

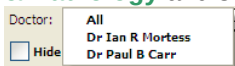
The *Last* column refers to whether or not the result is the last result in a group of ordered results. That is, if you order a FBC and TFT's, the FBC might come back first and will be marked as 'N', meaning it is not the last result for the group ordered. When the TFT comes back it should be marked as 'Y'.

Note: Again, if the Last is marked as 'Y' but you know it is not, speak to the laboratory responsible as Genie has no control over this.

The *Hide Results on Hold* checkbox is used to hide from the display area those results which have been put on hold. This would usually be used by Specialists where they may receive results ordered as a copy from the referring GP. The results may arrive well before the patient does, so the results can be put on hold until the patient turns up.

6.10.5 Matching and Linking Results to Patients

To check your results click the **Results to Review** button in the Navigation Palette or go to **Open > Pathology & Radiology** and select your name from the *Doctor* drop-down menu.



Double-click on the first record in the list to open and view the actual result.

Number 523 of 1451 results

Result: Taylor TURNER
04/04/1946
4044 64529 4

Match Find Last Link Unlink Redir INR New Clin Edit Print Lesions Ent/SMS

Sullivan Nicolaides Pathology Reports

FBC
Reason for test: Dr Drew J Speight
Ordered by: Dr Drew J Speight

Requested: 13/04/2000
Collected: 12/05/2000
Reported: 12/05/2000
Reference: 304-197608

Copy to: Dr Bradley J Kendall

File Name:

			REFERENCE RANGE
HAEMOGLOBIN	135	g/L	125 - 175
HAEMATOCRIT	0.42		0.38 - 0.54
M.C.V.	84	femto L	81 - 97
M.C.R.	27.0		27.5 - 34.0
RED CELL COUNT	5000.0	Thousand/uL	4200.0 - 6500.0
WHITE CELL COUNT TOTAL	6.3	Thousand/uL	3.5 - 10.0
NEUTROPHILS	65.18	4.10 Thousand/uL	1.50 - 6.50
LYMPHOCYTES	12.78	0.80	0.80 - 4.00
MONOCYTES	16.94	1.06	0.00 - 0.90
EOSINOPHILS	4.58	0.28	0.00 - 0.60
PLATELET COUNT	267	Thousand/uL	150 - 400

Progress report.

FULL BLOOD COUNT

	03/12/99	31/01/00	01/03/00	22/03/00	12/05/00	R.RANGE
HAEMOGLOBIN	143	114*	105*	100*	135	125-175
HAEMATOCRIT	0.43	0.34*	0.32*	0.32*	0.42	0.38-0.54
M.C.V.	98*	97	89	84	84	81-97
M.C.C.	6.5	5.7	6.4	5.9	6.3	3.5-10.0
NEUTROPHILS	4.54	3.56	4.46	4.02	4.10	1.50-6.50
LYMPHOCYTES	0.83	0.88	0.68*	0.73*	0.80	0.80-4.00
MONOCYTES	0.96*	0.95*	0.93*	0.84	1.06*	0.00-0.90
EOSINOPHILS	0.18	0.27	0.27	0.25	0.28	0.00-0.60
PLATELETS	240	346	310	329	267	150-400
FERRITIN	7.0-45.0	149*	<5*			30-300

RED CELL FOLATE 149* 340-950

B12/FOL COMMENT B12FC

B12FC: Serum B12 levels usually parallel body stores, but unexplained low values do occur in some patients without B12 deficiency. Unexpected results should be checked on a fresh specimen. Serum Folate mostly reflects recent intake: red cell folate levels are usually an accurate indicator of body folate status, but may be falsely low in severe B12 deficiency. Three tests (B12, serum folate and red cell folate) are recommended for initial assessment of B12 or folate status and will be provided when "B12 and Red Cell Folate" is requested.

S-TOTAL PROTEIN 71 63-80

S-ALBUMIN 37 35-50

S-GLOBULINS 34 20-40

Page 1 1/2 Line 1, Col 1 NUM CAPS

Button Description



Match

The **Match** button is used to Match the result to a patient in the database using the provided laboratory details, if Genie hasn't done so already.



Find

The **Find** button allows you to search the patient database for the correct patient to link the result to.



Last

The **Last** button can be used when there has been a spelling mistake by the lab in the patient's name, which has forced you to perform a manual search for the patient. If the patient has several results to review, it is not practical to do a search to match

each result. In this case just click on the **Last** button and Genie will match it to the last patient that was matched to a result.



Link

The **Link** button allows you to add an action to the result and link it for display in the patient's Clinical Window.



Unlink

The **Unlink** button will unlink the result from the patient, in case you have accidentally linked it to the wrong patient.



Redir

The **Redirect** button is used to change the Addressee (i.e. the doctor to whom the result is being sent for review). For example, if you see another doctor's patient while they are on holiday and order an INR*6, you don't want to keep getting the INR results for the next 6 months. In this case, clicking on the **Redirect** button will send it back to the original provider.



The **INR** button allows you to keep track of a patients INR control which is accessed through the Tools menu in the clinical window for the patient.



New

The **New** button allows you to add the patient into your database if they do not already exist.



Clin

The **Clinical** button opens the patient's clinical window.



Edit

The **Edit** button opens the patient's demographic window.



Print

The **Print** button prints the result.



Lesions

The **Lesions** button allows you to link this result to the lesions module which is accessed through **Tools > Lesions** in the patients clinical window.



Eml/SMS

The **Email/SMS** button allows you to email or SMS the result to the patient provided the patient has an email address or mobile phone number entered in their demographic window.

Note: The shortcuts for these buttons can be found in [Keyboard Shortcuts](#).

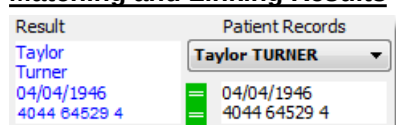


The **Previous Record** and **Next Record** buttons allow you to Navigate between results.

The **Make Letter** button allows you to convert the result into a letter. Once you click this button and then click the **Link** button, a window will appear asking if you would like to convert this result to an Incoming Correspondence record for this patient. Clicking **Yes** will link this result in the patient clinical record as an incoming letter. Clicking **No, Leave as Result** will leave it as a result and link it in the patients clinical record as a result.

The **Open RTF** button allows you to open the result/letter in an external viewer. This button will only appear if the result/letter contains RTF format data. Once linked to the patient, the result/letter can be opened in an external viewer by right-clicking on the result/letter in the [Contact List](#) and selecting *Open RTF* or double-clicking on the result in the Contact list and clicking the **Open RTF** button.

Matching and Linking Results



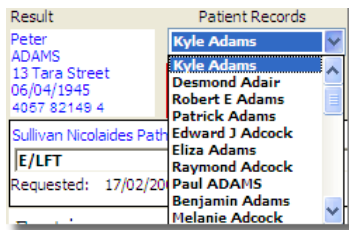
The information in blue text in the *Results* field is the patient's demographic information as held by the laboratory. The information in the *Patient Records* field is the information that Genie has found best matches the laboratory information. The Genie search is made on Surname and the first 3 letters of the First Name.

If one patient record found:

If BOTH the Medicare No AND the DOB don't match, then Genie assumes that this is the wrong patient with the same name, and so then searches just by DOB.

If more than one patients found:

Genie searches the found records for a matching DOB. If it doesn't find any match, it puts all matches in the drop down menu above the Genie information box and prompts you that there is more than one possible match.

**No patients found:**

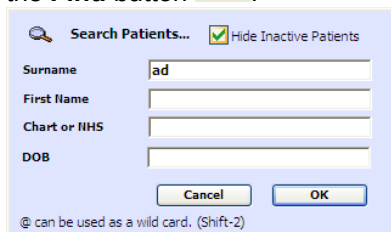
Genie does a second search by DOB and the last 3 letters of the surname. If it doesn't find a good match, then no patient information will be displayed.

In the screenshot above it has found a matching patient record in the database, however there is a mismatch with the Medicare number. When this happens, you can simply drag the Medicare number from the lab's information onto the Medicare number of the Genie database to automatically update the Genie data. You can do the same with the address and Date of Birth, assuming you are happy that the laboratory information is correct.

If Genie has not found an automatic match when the result is displayed, you should click on the **Match** button to search again. If it still doesn't find a match, you can search for the patient in your database by using



the **Find** button



As with all searches, the less you type in, the more likely you are to find the correct record, particularly if there is a spelling mistake in the name. You could also just search on the First name if you suspect the Surname has been spelt incorrectly.

If you still cannot find the patient in your database then you can create a new patient record with the laboratory



information using the **New** button. Be judicious about creating a new patient record. This is an excellent way of creating duplicate patient records.

Once you have a good match, click on the **Link** button

If you get the below message it means that either the Address, DOB, or Medicare Number do not match as indicated by the red $\neq$ sign.

If you click **Link**, rather than **Cancel** and fixing the problem, then a memo will automatically be created in the patients demographics to 'Check Address' or to check whichever of the three is incorrect.

The Action List Window

This window appears after clicking the **Link** button within a result and allows you to select the action to be stored with the result for medico-legal purposes.

You can **Add** and **Delete** action items from the list using the buttons to the left of the list itself. You can also re-sort the list by dragging and dropping items within the list.

The *Alternative message* field allows for free text entries, up to 80 characters in length, which may only be relevant to the current result and you do not wish to keep in the list.

You can also change the Normal/Abnormal marking if you disagree with the lab's classification.

The patients next appointment, if they have one, will automatically be displayed in red at the top of the window, noting the doctor they are booked in to see, date and time of this appointment.

The *Add to Action List* checkbox is checked by default if you have selected the *Move to Action List after linking* checkbox in your User Preferences (**File > User Preferences**). The result will be moved to the Action List (**Open > Investigations Action List**) after linking so that the receptionist/practice nurse can go through the

Action List taking whatever action necessary for each result (see [Pathology Recalls \(Investigation Action List\)](#) for more information). You can tell that the requested action has been taken if there is an [N] in Notification column of the Contacts list in the patient's Clinical Window.

Date	Pathology and Radiology	Provider	Notification
29/06/2000	FBC	Dr Alan J Laughlin	[N] - Recall

If you don't use the Action List deselect the abovementioned checkbox in your User Preferences.

If the *This is a Pap Smear Result* checkbox is ticked, a *Select smear result...* drop down menu will appear directly below. This smear result and the test date is then automatically inserted into the *Last Pap* field in the patient's Clinical Window. The checkbox will be ticked automatically if Genie finds the words 'smear' or 'endocervical' within the result text.

If the *This is a HPV Result* checkbox is ticked, a *Select HPV result...* drop down menu will appear directly below. This HPV result and the test date is then automatically inserted into the *Last HPV* field in the patient's Clinical Window.

The *Flag Patient's Record* checkbox is used when you would like to ensure that a recalled patient actually gets seen within a certain period of time. If the flag is not removed from the Clinical Window, usually done when the Clinical Window is accessed when the patient presents, then Genie will warn you once the due date has passed with the **Overdue Patients** button in the Navigation Palette.

The **Create Task** button allows you to create a task for the patient regarding the pathology result. When the task window opens, the title of the task contains the words 'Path result' and the patients name. The body of the task contains the name of the pathology tests and the test date. Additionally, this task is automatically linked for display in the patient's Clinical Window.

The **Create Recall** button allows you to create a proper Recall record rather than just asking the receptionist to recall now in the Action List. You would usually do this when the recall isn't urgent but you would like to repeat the test in 3 months for example.

Click the **Link** button to link this result to the patient.

Genie will then display the next result in the list until you reach the last one.

Incorrectly Linked Results

If you have linked a Pathology/Radiology Result to the wrong patient, you can unlink this result and then link the result to the correct patient by going to **Open > Pathology and Radiology** and using the **Magnifying Glass** to

find the patient with the incorrectly linked result. Double click on the result and click on the **Unlink**  button. The result can now be linked to the correct patient using the **Match** and then **Link** button.

6.11 Reviewing Correspondence

This option is used by providers that review letters typed by another staff member.

When the current user has letters waiting to be reviewed, a Letters to Review button will appear in the Navigation Palette.



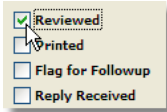
Alternatively, you can click on the **Review Correspondence** icon  in the Appointment Book, or go into **Open > Outgoing Letters**.

Date	Patient	To	Carrier	Sent	Ack	From	Creator	Pref	Clinic
05/09/12	Miss Samantha G STATE	Dr R J COHEN		False	False	Dr Andrew Largem	Dr Andrew Largem		Garden Clinic

In a multi-doctor practice, select your own name from the 'From' drop down menu, to display only letters from

yourself.

Double-click on the first letter in the list to open the letter. Once you have reviewed and/or corrected the letter, click the *Reviewed* checkbox.



This will then automatically move you to the next letter in the list. You are able to manually navigate around the list by using the arrow buttons at the top of this window.



Once you have finished reviewing the letters, you can print them, fax them, email them, or leave them for your receptionist as per the instructions in [Reviewing Correspondence](#) in the Reception Module of this manual.

Reviewing Letters Offsite

Letters can be reviewed offsite in two ways. First, you can use [Offsite Logging](#). Alternatively, clicking on the

Word button  will export any highlighted letters as Word documents.

They are placed in a folder called 'Letters Folder' inside the Genie folder on the local machine. If the Letters folder doesn't exist, Genie will automatically create it.

This folder can then be taken home on a USB or other portable media device. The following day, replace the Letters folder in the Genie folder, on the local machine that will import the letters, open the Correspondence

window and click on the **Import** button .

This will import the Word documents with any changes, and replace the original 4D write documents. You will be asked if you would like the imported letters to be marked as having been reviewed. Click **Yes**.

Once the import has finished, you will be asked if you would like to delete the Word documents in the Letters folder. You should agree to this, otherwise they will still be there the next time you do this procedure unless you delete them manually in the meantime.

6.12 Procedures

This chapter deals with the management of Procedure records, including Quotes and Operation reports.

6.12.1 Adding a Procedure

Procedures can be added from either the patient's Clinical Window or the Appointment Book.

Adding a Procedure from the Clinical Window

In the Clinical Window, the procedure is added by going into **Tools > Add Procedure**.

Note: The current date is entered and the time defaults to 12:00 AM.

There are two reasons why a Procedure would be created from the Clinical Window.

1. You are performing a minor procedure such as an excision on the day and you would like to record the fact. In this case, you would deselect the *Needs an Appointment* checkbox, at the bottom right hand side of the screen and just save the record by clicking **OK**.
2. You have seen the patient and decided that they need an operation at some time in the future:
 - a) If you know when you are going to perform the operation, you would enter a date and time, tick the *Needs an Appointment* checkbox, and then click on the **Make Appointment** button.

This will automatically create an appointment for the patient with the procedure already linked, on the stated date and time.

- b) If you don't know when the procedure will take place (e.g. the patient has to first arrange time off work), you would leave the *time* field blank, tick the *Needs an Appointment* checkbox, and then click the **Appointment Pending** button. This will mark the Procedure as a Pending Procedure and will place a [P] in front of the procedure name in the Contact List (for more information see [Pending Procedures](#)).

Adding a Procedure from the Appointment Book

To add a procedure record from the Appointment Book (i.e. book a patient into theatre, highlight the patient's appointment and click on the Procedure button .

This will create a new Procedure record. If the appointment already has a procedure linked to it, the existing Procedure record will open.

The screenshot shows a software window titled "Mrs Toni G Caelli - No contact number" with a "Listmaker ID: 0" in the top right. The window has three tabs: "Details", "Quotes", and "Op Notes", with "Details" being the active tab. The form is organized into several sections:

- Procedure Information:** Includes a "Procedure:" dropdown, "Side:" with "Right" and "Left" checkboxes, "ICD10:" and "Custom Code:" text boxes, and "Add to Menu" and "Add to Past Hx" buttons.
- Provider and Hospital:** Includes "Provider:" (set to "Dr A Demo"), "Hospital:" (with a "Notified" checkbox), "Date:" (26/01/2012), "Time:" (11:00 AM to 11:15 AM), "Admission:" (26/01/2012 at 7:00 AM), "Fast from:" (2:00 AM), "Discharge:" (26/01/2012), and "Inpatient Days:" (1).
- Diagnosis and Indication:** Includes "Pre-op Dx:" and "Post-op Dx:" text boxes with plus icons, an "Indication:" dropdown, and a "Pre-op Notes:" text area with a "WC Info" button.
- Procedure Details:** Includes "Category:", "Magnitude:", "Infection Risk:", "Procedure Type:", "Anaesthetic:" (with an "ASA" checkbox), and "Prosthesis:" dropdowns.
- Consent and Prepayment:** Includes checkboxes for "Consent has been signed", "Prepayment Received", "Confirmed with Patient/ Paperwork Sent", "Approved by 3rd Party", and "MRSA Positive".
- Buttons:** At the bottom are "Set Default Times", "Load Template", "Save Template", "Macros", "Delete", "Cancel", and "OK".

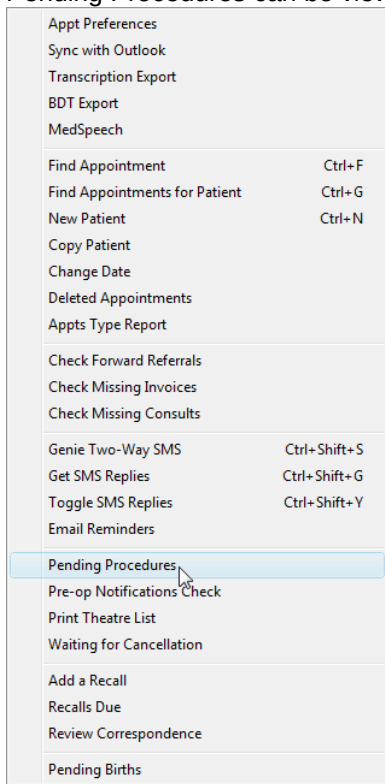
Note: The Date and Time fields have been taken from the appointment date and time. If the appointment is subsequently moved to a different date or time, these fields will be updated automatically. If necessary, you can manually adjust the time of the procedure by simply clicking in this field and entering the appropriate time. This won't move the procedure from the current appointment spot.

Completed Procedures

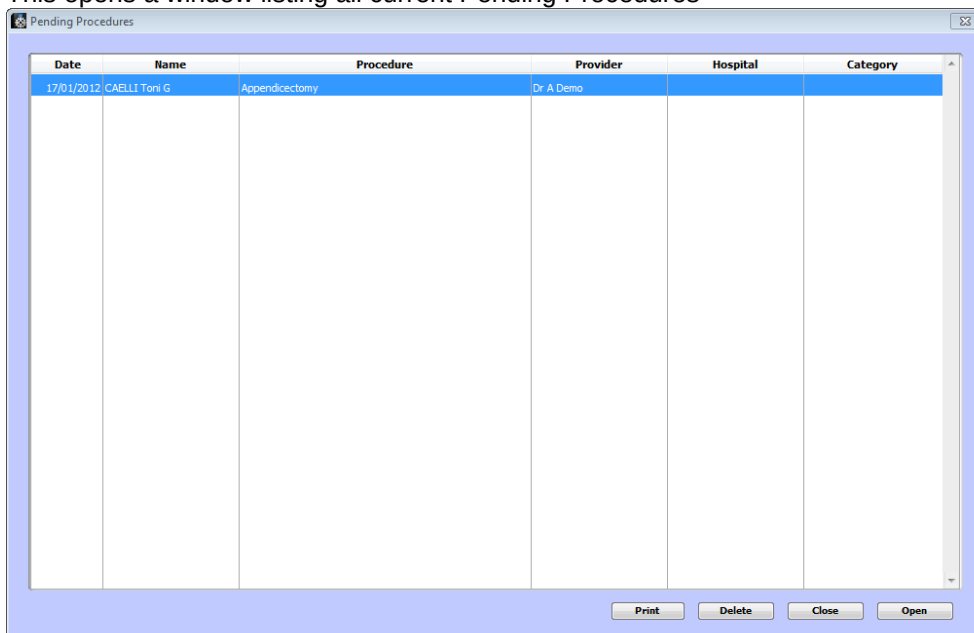
When patients have had many procedures, it may become difficult to see the major procedures in your Contact List at a glance. You can copy any past procedure over to the Past History list by simply dragging it from the Contact List into the Past History box.

6.12.2 Pending Procedures

Pending Procedures can be viewed from the Appointment Book by going into **Appts > Pending Procedures**.

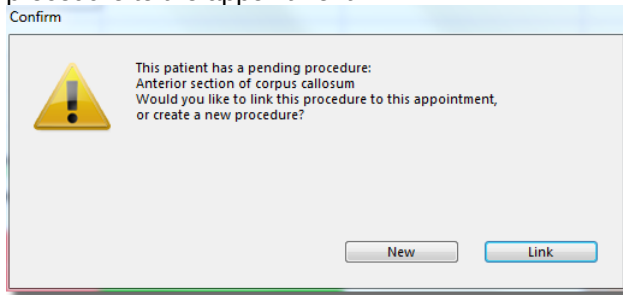


This opens a window listing all current Pending Procedures



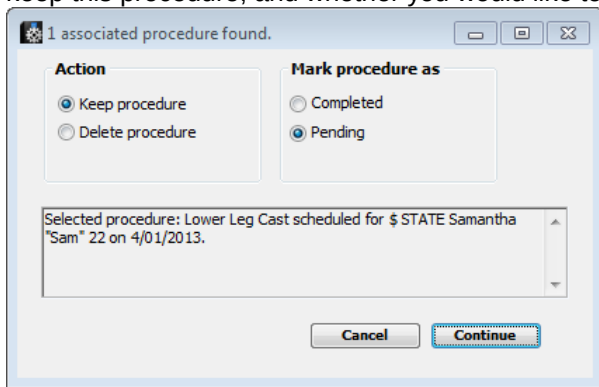
If you now have a date and time for the procedure, double-click on the procedure to open it. Once you have entered a date and time, the **Save** button will change to **Make Appointment**. Click on this button and the appointment will be made automatically.

Alternatively, you can make the appointment for the patient in the appointment book first, then when you click on the **Procedure** button , Genie will check for any Pending Procedures for this patient and offer to link the procedure to the appointment.



Deleting a Procedure

When you delete a procedure from the Appointment Book, Genie will prompt you as to whether you would like to keep this procedure, and whether you would like to mark this procedure as Pending.



It is very important that you mark this as *Pending*, not *Completed*. If you mark this as *Completed*, it will stay on the theatre list, despite there being no corresponding appointment.

6.12.3 The Procedure Window

The Details Tab

Enter the name of the procedure by simply typing it into the *Procedure* field, **or** selecting it from the drop-down menu. If you are using ICD10 or ICPC coding, enter a keyword which best describes the procedure. If this procedure involves multiple operations, just enter the major one, and type the remaining procedures in as free text.

You can build a list of your common Procedures by clicking on the **Add To Menu** button. This will add the Procedure name to the drop-down menu to the left of the *Procedure* field.

The **Add to Past Hx** button will add this procedure to the patient's past history list in their Clinical Window.

The *Left* or *Right* tickboxes allow you to specify which side of the body the procedure pertains to.

The *Provider's* name will be filled when booking a Procedure into the Appointment Book, or if the record is created by the provider themselves.

The *Hospital* drop-down list is determined by the 'Rooms' entered in Genie. See [Theatre Lists](#) for more information on setting up rooms in Genie. A Hospital must be assigned in order for the procedure to be included and printed on the theatre list.

Pre and Post-op diagnoses can also be entered.

Clicking on the **Blue Plus** sign button to the right of Pre or Post-Op Diagnosis will add the diagnosis to the patient's Current Problems list.

Clicking on the **WC Info** button allows you to select the relevant Workcover claim and inserts into the Pre-Op Notes field the claim number, injury date, employer and insurer details.

Any pre-op notes you make will print on the theatre list.

Pre-op Notes:
(prints on
theatre list)

When you click on the *Assistant*, *Anaesthetist* or *Paediatrician* fields, Genie searches the Address Book for doctors who have been assigned this speciality. If it finds any, you will be given a list of matching records from which to select.

Category, *Magnitude* and *Infection Risk* are optional fields in which you can add your own criteria to the drop-down menus.

Procedure Type must be selected if you intend to use the Quotes section. *Anaesthetic* and *Prosthesis* information will print on the theatre list.

The various tick boxes within this window can be used for the Pre-op Notification function (see [Pre-Op Notifications Check](#)).

Making a selection from the *Surgical Performance* drop-down list will take you to the Surgical Performance website. Surgical Performance allows you to compare your outcomes of surgery with the outcomes from your colleagues. For further information about this facility, please refer to www.surgicalperformance.com. Please note that Genie Solutions has no affiliation with this organisation.

The Quotes Tab

[illegible]

This window allows you to create a Quote for the patient, based on the item numbers selected for the Procedure. Please refer to [Quotes](#) for more information.

The Op Notes Tab

Findings, *Technique* and *Post-op* information can be entered in this window.

As these notes are generally the same for the specified procedure, they can be saved along with other relevant information into a template.

For more information on creating templates, see the [Procedure Templates](#).

In the upper right section of this window you can add a checklist for this procedure. These could be used as a pre-operative checklist or as the actual operation report. For more information, see [Checklists](#).

There are a range of checkboxes covering a variety of common complications in order to record procedure audits. Some are general such as post-op infection, others are speciality-specific such as 'T-zone Breakdown' for Plastic Surgeons and 'Bile Leak' for general surgeons.

When you tick a checkbox, note that a summary of complications is entered into the *Audit Summary* field. This is so that this field can be referenced in a post-op letter to a referring GP. e.g. 'Operation was performed, complicated by...'

As well as the supplied complications, you can add any other complications using the *Other Complications* menu.

The Procedure Audit itself is accessed through **Open > Procedures, Audit Report** button.

6.12.4 Procedure Templates

Generally, procedures will be performed in the same manner, with the same billing outcomes. For this reason many of the entries in the Procedure window can be saved using the **Save Template** button.

The fields that are saved on the template include:

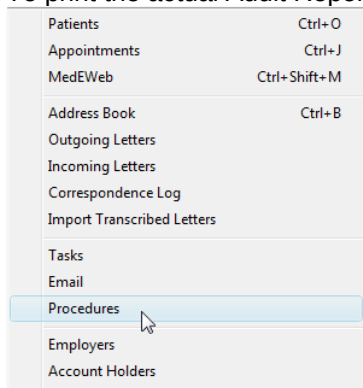
- Procedure Name
- Pre-op diagnosis
- Post-op diagnosis
- Indications
- Pre-op notes
- Checklists
- Item Numbers
- Op Notes

Enter all information required for your template in any or all of the above fields and then click **Save Template**. When linking this procedure to a patient in the future, the template can then be selected via the **Load Template** button.

Note: When creating templates, it is best to create them with a test patient to ensure no clinical information is inadvertently saved into the template.

6.12.5 Printing an Audit Report

To print the actual Audit Report, select **Open > Procedures**.



This opens a list of all Procedures performed, sorted by date.

 A screenshot of the 'Procedures' window. The title bar says 'Procedures: 4 of 4 Records - Current User Dr A Demo'. There are buttons for 'Audit Report' and 'Find Complications'. A dropdown menu for 'Provider' is set to 'Dr A Demo'. Below is a table with 8 columns: Date, Patient, Procedure, Provider, Assistant, Anaesthetist, Hospital, and ICD10.

Date	Patient	Procedure	Provider	Assistant	Anaesthetist	Hospital	ICD10
25/01/12	Mrs Toni G Caelli	Liposuction	Dr A Demo				
05/01/12	Mrs Toni G Caelli	Appendicectomy	Dr A Demo			Mater Hosp	30571-00
07/05/10	Mrs Rachel L Baas	Arthroscopic meniscetomy of knee	Dr A Demo	Dr Peter Anderson		Mater Hosp	49560-03
21/04/10	Mrs Ida Ackfield	Appendicectomy	Dr A Demo				30571-00

Click on the **Audit Report** button.

The window below will open, allowing you to set the parameters of the report.

 A screenshot of the 'Audit Report' dialog box. It has a title bar 'Audit Report'. On the left, there is a list of complications to include in the report, all of which are checked. On the right, there are fields for 'Provider' (Dr Izzy Better), 'Period' (This month), 'From' (01/05/2010), 'to' (31/05/2010), 'Procedures' (All), and 'Hospitals' (All). There are 'Cancel' and 'OK' buttons at the bottom.

Select the complications to include in the report

- ☒ Suppurative Infection
- ☒ Non Suppurative Infection
- ☒ Wound Haematoma
- ☒ Wound Dehiscence
- ☒ Incomplete Excision
- ☒ Graft Failure
- ☒ T-Zone Breakdown
- ☒ Pulmonary Infection
- ☒ Pulmonary Embolus
- ☒ Bile Leak
- ☒ Anastomotic Leak
- ☒ Reoperation
- ☒ Failed Laparoscopy
- ☒ Hysterectomy under 35

Provider: Dr Izzy Better

Period: This month

From: 01/05/2010 to: 31/05/2010 (Dates are inclusive)

Procedures: ☒ All ☐ Select

Hospitals: ☒ All ☐ Select

Cancel OK

The items to check are on the left. You can deselect any irrelevant items.

You can choose between different providers across a range of dates. You can also do a report for all procedures performed or just for a specific operation, as well as either all hospitals or just for a specific hospital, making it possible to compare infection rates for example. As well as reporting on the listed items, the audit will also report on any user-added complications.

6.12.6 Conversion Ratios

Note: Conversions are currently only available if your Practice Type is set to 'Plastic Surgery'.

Conversion Ratios measure the number of patients who call to enquire about a procedure, the percentage who progress to a consultation with a provider, and the percentage who subsequently proceed to have the procedure performed.

In the Patient Demographic screen, there is a tab labeled **Conversions**. This is used initially to record when a patient rings to make an appointment about a new procedure, or to enquire about a procedure and its costs. The patient would have to have a patient record in Genie in order to add the new Ratios record. This is done by clicking on the **Blue Plus** button.

This will enter the current date and current user in the *1st Contact Date/Staff* fields.

If an appointment is made, and the patient arrives, you will be prompted to add this date and the provider from the appointment book into the Ratio record.

Update Ratios Record

Do you want to record these appointment details in the Conversion Ratios record?

1st Contact Date/Staff: 13/01/12 Reception

Referral Source: Existing Patient

Doctor Consult: 17/01/2012 Dr A Demo

Procedure Date: 00/00/00

Procedure:

☐ Procedure Performed

Don't Save Save

Click **Save** if this is the doctor's appointment that is related to the initial contact.

If a procedure is booked into the Appointment Book, you will again receive a prompt to record this as the planned procedure.

Update Ratios Record

Do you want to record these procedure details in the Conversion Ratios record?

1st Contact Date/Staff: 13/01/12 Reception

Referral Source: Existing Patient

Doctor Consult: 17/01/12 Dr A Demo

Procedure Date: 25/01/12

Procedure: Liposuction

☐ Procedure Performed

Don't Save Save

Note: If you enter the details manually via the Patient Demographics window, it is strongly advisable to use the small paperclip button to select the procedure rather than just typing in the date and procedure name. Using the paperclip links this record to the actual procedure, so that if the procedure date is subsequently changed, the Ratios record will also be updated.

Update Ratios Record

Do you want to record these procedure details in the Conversion Ratios record?

1st Contact Date/Staff: 13/01/12 Reception

Referral Source: Existing Patient

Doctor Consult: 17/01/12 Dr A Demo

Procedure Date: 00/00/00

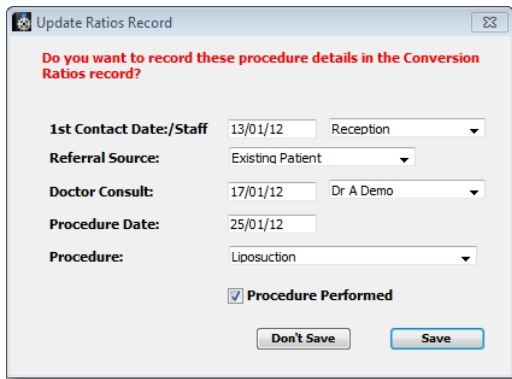
Procedure:

☐ Procedure Performed

Don't Save Save

For the procedure to count as having been completed, the *Procedure Performed* checkbox must be ticked.

This can be done manually through the demographics window or you will be prompted to complete it when you save the procedure record after the Procedure Date has passed.



Update Ratios Record

Do you want to record these procedure details in the Conversion Ratios record?

1st Contact Date:/Staff: 13/01/12 Reception

Referral Source: Existing Patient

Doctor Consult: 17/01/12 Dr A Demo

Procedure Date: 25/01/12

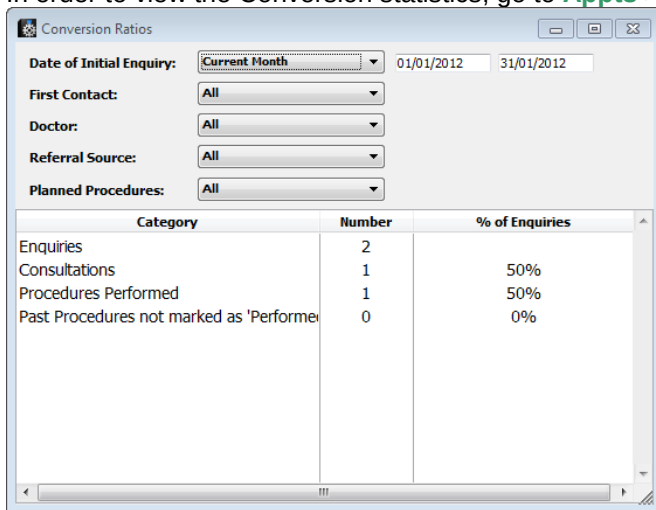
Procedure: Liposuction

☒ Procedure Performed

Don't Save Save

Viewing Conversion Ratios

In order to view the Conversion statistics, go to [Appts > Conversion Ratios](#)



Conversion Ratios

Date of Initial Enquiry: Current Month 01/01/2012 31/01/2012

First Contact: All

Doctor: All

Referral Source: All

Planned Procedures: All

Category	Number	% of Enquiries
Enquiries	2	
Consultations	1	50%
Procedures Performed	1	50%
Past Procedures not marked as 'Performed'	0	0%

Select the date range from the *Date of Initial Enquiry* dropdown menu, or enter the dates manually. This is the date range which will contain the dates of the Initial Contact.

Genie will then display the conversion ratios in the right-most column, whether the appointment and procedure falls within this date range or not.

You can also filter according to the categories listed in the dropdown menus.

Double-clicking on any of the lines allows you access to the original Ratios record if you would like to make any changes.

6.13 Images

The following sections explain how to attach images such as photos using [ImagePro](#), and how to view and manipulate these images once they are attached.

For information on scanning, see the [Scanning](#) section in the Reception module.

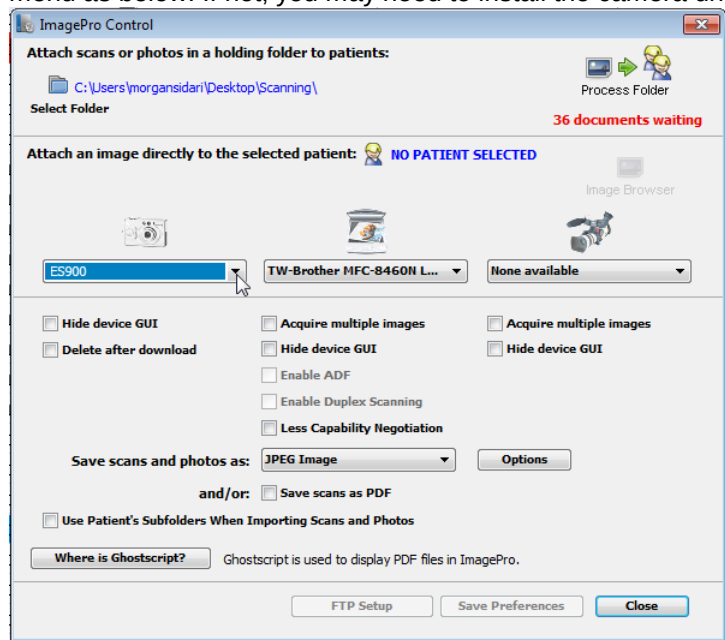
6.13.1 Attaching Images

Attaching Images Direct from a Digital Camera

Open the Image Browser window from the patients clinical window using the **Image Browser** button .

Open the ImagePro Control window using the **Camera** button  in the Patients List.

Connect your camera to your computer and turn it on. Genie should recognise your camera in the drop down menu as below. If not, you may need to install the camera driver using a CD that came with your camera.



Click on the **Camera** button and Genie will bring up a list of photos on your memory card. Ticking *Hide Device GUI* will prevent the camera software window from coming up, if desired. Highlight the images you would like to attach to this patient. If you would like to select multiple images, **Shift+click** or **Ctrl+click** on the images you require. Click **OK**. Genie will prompt you for a description for the image(s). For multiple images, Genie will name the images: name_1, name_2, name_3 etc. If you have *Delete after download* ticked then the images will be deleted from your camera after they have been successfully imported into the patient's Clinical Window. It is best to take photos in VGA or email mode to keep them at a reasonable size. The quality will still be adequate for viewing purposes, it is only if you are going to print the photo bigger than 6x4 that you need higher resolution. VGA/email will be a size setting on your camera itself.

Note: If Genie and your scanner are not communicating correctly, it is recommended you try ticking the setting *Less Capability Negotiation*. This setting simplifies the language Genie and the scanner use and may rectify your problem.

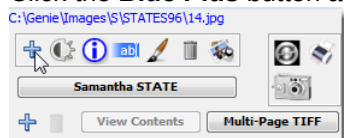
Attaching Images from File

Images can be attached to a patient's Clinical Window from a number of places within Genie.

1. Via Image Browser

Open the Image Browser window from the patient's Clinical Window using the **Image Browser** button .

Click the **Blue Plus** button at the top left of the Image Browser window.



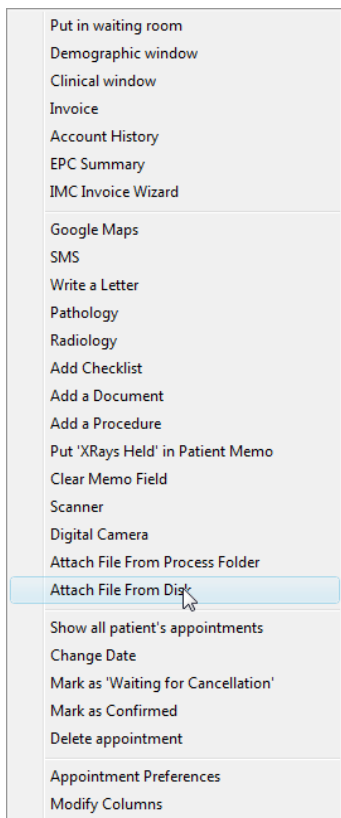
This will open a Browse window allowing you to navigate to where the images are stored. Select the image you wish to attach and click **OK**.

Note: Images can only be attached one at a time.

These images will need to be named before attaching or renamed using the **Rename** button  once attached.

2. Via Appointment Book

Right-clicking on a patient in the Appointment Book will provide you with the option to perform many common functions in Genie, including *Attach File From Disk* or *Attach File From Process Folder*.



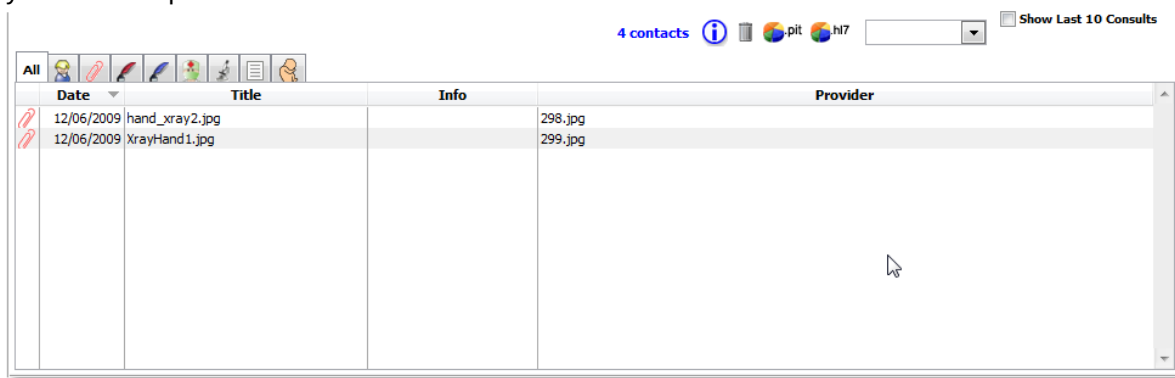
Attach File From Disk will open a Browse window for you to select the image to attach. *Attach File From Process Folder* will open the holding folder specified in your ImagePro Control window (**Special > ImagePro Control**).

3. Via Patients List

Right-clicking on a patient from the **Open > Patients** list will provide you with a similar list to above, allowing you to *Attach File From Disk* or *Attach File From Process Folder*.

4. Via the Contacts List in a Patient's Clinical Window

Opening a patient's Clinical Window and right-clicking on any entry in the Contacts List will also allow provide you with the option to *Attach File From Disk* or *Attach File From Process Folder*.



6.13.2 Viewing Images

The Image Browser window displays the contents of the selected patient's images folder on the server. It can be opened where you see this button .

Button Description



The **Blue Plus** button allows you to add an image stored on your hard disk to the selected patient's folder.



The **Filter Image** button allows you to apply a variety of changes to an image such as Contrast, Brightness, Hue, Saturation and RGB Balance.



The **Information** button opens a window which stores information about the image, including the size, camera information, type and source of the picture. If you assign the Type as 'Mugshot' and have the *Display Patient Mugshot* option ticked in **File > User Preferences**, this photo will be displayed when the patient's demographics or clinical window is opened.

You can also assign up to three keywords so that you can subsequently find everybody for whom you have a photo of a melanoma for example (see [Search for Attachments and Images](#))



The **Rename** button allows you to rename the image.



The **Paintbrush** button opens the image in the drawing module, allowing you to draw on and annotate the image. See [Drawing Module](#).

Note: These changes actually become part of the image and therefore are permanent. You cannot subsequently delete your annotations.



The **Garbage Can** button will delete the image permanently from the server.

Note: If the selected item is a document rather than an image, all the above buttons will be disabled except for the Delete and Rename buttons.



The **Acrobat** button will open a selected PDF in Acrobat Reader.



The **Synchronise** button synchronises the records held in Genie with the actual file present in the patient's folder on the server. Synchronising you images can be useful if images have been added or removed from the patient's folder on the server, and this is not reflected in their Genie folder.

Multi-Page TIFF

The **Multi-Page TIFF** button opens a window where you can drag and drop images and then combine them into a single TIFF file. The output file is very large, so this is not a very practical idea.

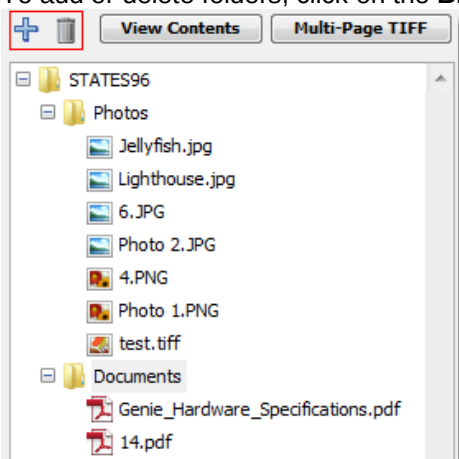
The created TIFF file is automatically placed in the same folder as the original files. The original files are untouched. If you would like to delete them, you must do so manually.

Note: You can't drag items from the Album list. To combine album images, you first need to click the Use Album button and then drag the desired files to the Multi-TIFF window.

Organising Images

The Image Browser window allows you to organise patient images and attachments into a folder hierarchy eg. Pre-op and Post-op folders. Folders can be added or deleted, and images dragged into them. Doing this actually creates the folders on the server machine and moves the images around on the server.

To add or delete folders, click on the **Blue Plus** icon, or the **Garbage Can** icon, see below.



At the top of the Image Browser window is a button which will display the name of the current patient. Clicking on this button opens a Search window, allowing you to quickly switch to another patient's folder. This could be particularly handy when setting up albums. See [Creating Albums](#) below for more information.

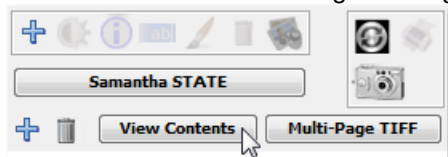
To view a single image:

Click once on the image. This copies it from the server to the TempImages folder on the client.

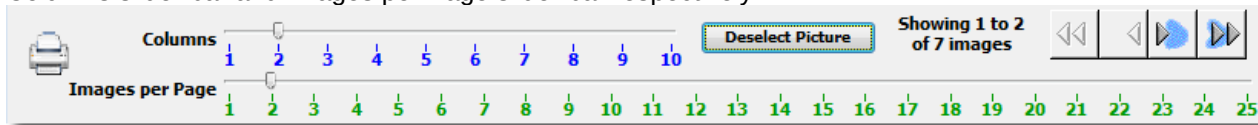
Note: In order to view PDF documents on Windows, you must download and install Ghostscript. Please see [Installing Ghostscript](#) for further details.

To view multiple images on the one page:

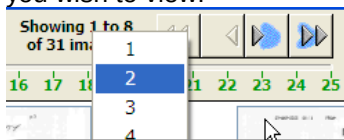
Click on the folder containing the images you would like to view, then click on the **View Contents** button.



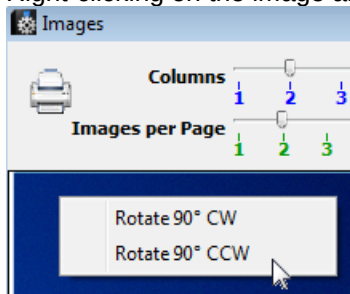
In this window you can sort the pictures by dragging and dropping them into the required position, as well as set the number of columns and the number of images per page that you wish to have on display, by using the Columns slider bar and Images per Page slider bar respectively.



Using the Forward and Back arrows will allow you to move to the next set of images on display. Additionally, you can skip to a specific picture by right-clicking on the 'showing 1 to 2 of x images' and selecting the image that you wish to view.



Right-clicking on the image allows for the rotation of the selected image.

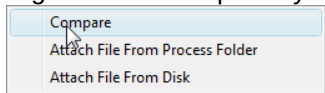


Clicking on the **Printer** button will allow you to print the images contained in this window. The Patients name, DOB, current date and file descriptions will be included on this print out. If there is an image on display that you don't wish to print, select the image and click the delete button on your keyboard. This will only remove the image from the current display, it DOES NOT delete the image from the patient's folder.

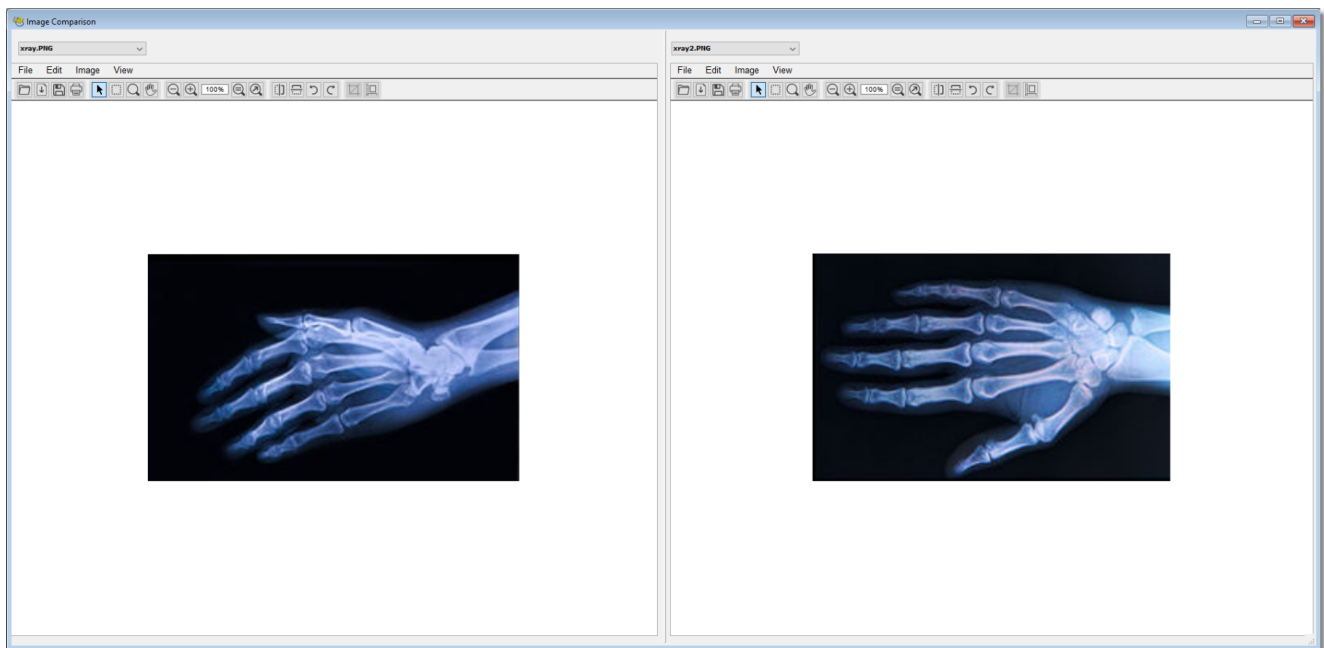
The **Deselect Picture** is designed for Window machines as it allows you to deselect pictures which are currently highlighted, and difficult to view due to the inverting of colours.

To compare images side by side:

Right-click on the primary image and select *Compare*.

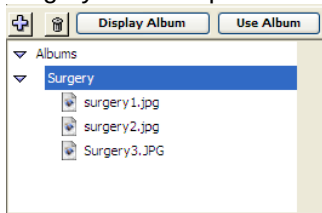


A split window will appear with a drop down box allowing you to select the 2nd image you wish to use in the 'Comparison'. The images will then display side by side.



Creating Albums

You can also create your own album of favourite photos for use in presentations, or to show the likely results of surgery to a new patient for example.



To add an album, firstly click the **Display Album** button, and then use the **Blue Plus** button which becomes active.

To add an image to your album, simply drag and drop it from the patient's display area into the Albums folder.

Note: The Album area is not automatically displayed when the Image Browser window first open. Click the Display Albums button to view the contents of the Albums folder.

The Albums folder is actually created inside the Images folder on the server. Albums are NOT patient specific. Albums are created for global use for display purposes or for collating images or photos into particular groups.

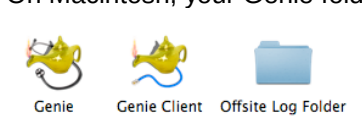
6.14 Offsite Logging

Offsite Logging allows you to use a laptop to edit patient records at a remote site e.g. in theatre, a patient's home or nursing home, and then update the main database with the changes, even though the main database may have been in use while you were away.

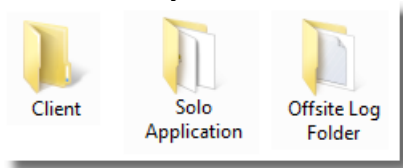
Setup

You must have the single user version of Genie installed on your laptop and it must be located in the same Genie folder as the Genie Client application.

On Macintosh, your Genie folder should contain the 2 applications as shown here.



On Windows, your Genie folder should contain the folders shown here.

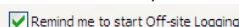


The Offsite Log Folder is automatically created the first time you begin offsite logging.

The version of Genie Solo on your laptop must be the same as the version of Genie Client. When you update Genie on your server, you must also update Genie Solo on your laptop before attempting any offsite logging. For information on how to do this, see [Updating for Offsite Logging](#) in the Updates section of this manual.

Note: Do not attempt to import logs created in an older version of Genie. If you try to import a log created with an older version, you may get unexpected results, if it works at all.

Before copying the data file from the server, go to **File > User Preferences, General** tab and make sure that the *Remind me to Start Offsite Logging* checkbox is selected.



This will prompt you to start offsite logging each time you log in to Genie Solo on your laptop.

6.14.1 Copying the Data File from the Server

Note: If you are using Genie version 8.5.9 or later, it is possible to use the Database Replication tool instead of the copy data script. This feature does not require your Genie server application to be closed, and may be preferable for large practices that cannot make time to close the server application. For more information, please see the [Database Replication](#) section at the end of this chapter.

Each time you go to use offsite logging you will first need to take a copy of the data file (Genie.4DD) and optionally the Images folder, if you wish to view images offsite, from the Genie folder on your server machine to the Genie folder on your laptop. If you do not have a fresh copy of the data file then the offsite log will not work.

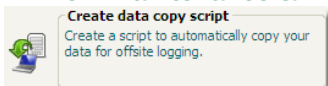
Before attempting to copy your data from the server to your laptop **YOU MUST QUIT THE GENIE SERVER APPLICATION**. Macintosh Operating System will not allow a file that is in use to be copied so if you attempt to do this, you will usually get an error message saying that you do not have enough privileges to perform the requested action. However, Windows operating systems do allow you to copy a file while it is in use so it is very important to ensure Genie Server is closed to make sure that the data file is not active and to prevent data corruption while it is copying.

The files can be copied manually across the network or a copy data script can be created in order to do this for you. If you would like to copy the files manually but are unsure of how to do this, you must contact your IT representative.

Creating a Data Copy Script

Note: In most cases this will work but if it doesn't, it will be necessary to speak to your IT representative (not Genie) about setting up a script manually. Genie Solutions will not set up or support third party file and folder synchronisation programs (eg. RSync, SilverKeeper etc). The installation and configuration of these programs is solely the responsibility of the practice concerned or their nominated IT representative.

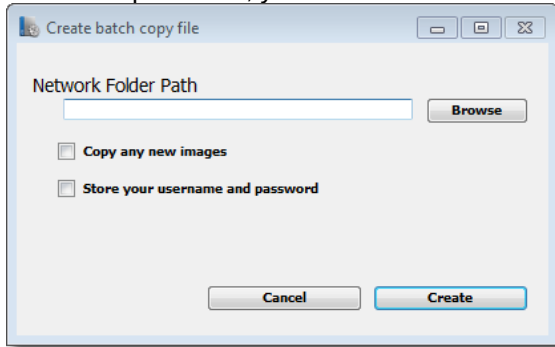
In **File > Maintenance & Reports**, Administrator tab, you will find the icon below.



Clicking on this will bring up a window where you are able to navigate to your Genie folder on the server using the **Browse** button.

If you would like to be able to view scanned images while you are offsite, tick *Copy any new images*. If you are required to enter a username and password when you connect to your server across the network then you can store it in this window by ticking the *Store your username and password* tick box. If you do not want to store your

username/password, you can enter them in each time you run the copy data script.



When you click on **Create**, an icon will be created on your desktop for you to use each time before you go offsite.

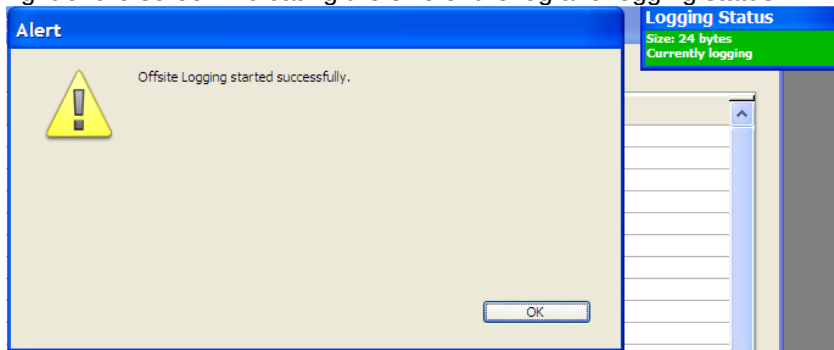
Note: If you have an all Macintosh network then the name of the hard disks on the client machines must be different to that of the server eg. If both hard disks are named 'Macintosh HD' the copy data script will not work. Consider renaming one of the hard disks to 'Macintosh_HD' or something similar.

6.14.2 Running an Offsite Log

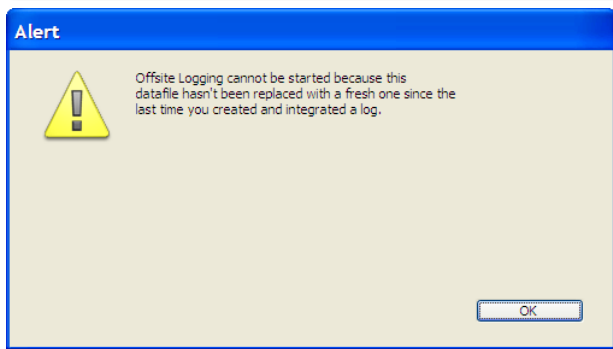
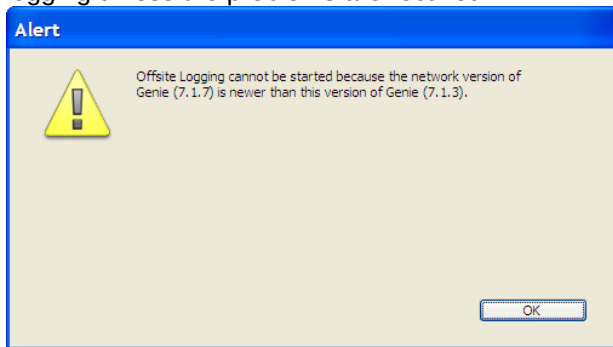
When offsite, launch Genie Solo, the single-user version of Genie. You will be asked if you would like to start offsite logging (provided you have *Remind me to start Offsite Logging* ticked in your User Preferences, [File > User Preferences](#)).

Click **Yes**.

If logging is successfully started, you will receive a confirmation message and a small window will open in the top right of the screen indicating the size of the log and logging status.

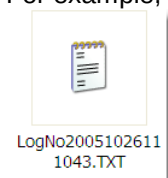


If Genie is unable to start offsite logging, you will receive an error message that logging has not started. The usual reason for failure is that the network and single user versions of Genie have different version numbers, **or** that you haven't taken a fresh copy of the data file. In either of these cases you will not be able to use offsite logging unless the problems are rectified.



When the offsite logging process begins, Genie creates a text file in the Offsite Log Folder, which is in the Genie folder on the laptop. This file is named using the current date and time, in the format of year, month, day, hour, minutes, seconds.

For example, the log file shown here was created on 26/10/2005 at 11:10:43.



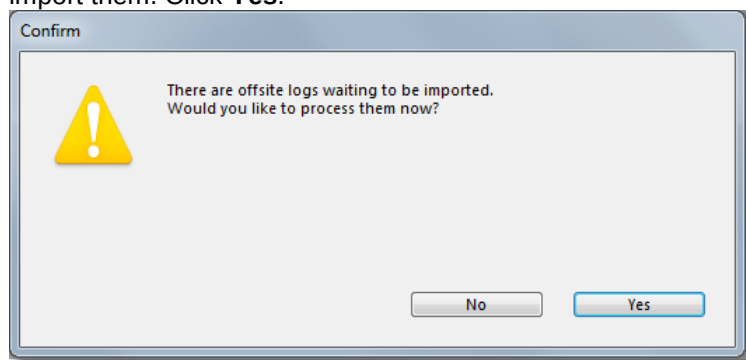
This is so that you can easily find a log from a particular day, and secondly, so that when a number of logs are imported back into the main database, they are imported in the correct chronological order.

Note: The log file is just a text file. It can be opened and examined with any word processor.

You should keep an eye on the logging status window to ensure that logging doesn't stop for any reason. You can re-commence logging if necessary by selecting **File > Start Offsite Logging**. To stop offsite logging, Quit Genie (**File > Quit**). You can log as many sessions as you like before the data is imported back into the main database.

6.14.3 Importing Logs

When you return to your rooms and connect to your main database by launching the Genie Client application, Genie checks the Offsite Log Folder to see if there are any new logs. If so, you will be asked if you would like to import them. Click **Yes**.



Genie will then import the log(s) and make the changes in the main database.

Once the log has been imported it is moved into an Archive folder within the Offsite Log Folder, so that it can be opened and viewed if there have been any problems with the import.

The data file on your laptop is marked as 'tainted' once the log is imported. You will not be able to use this copy of the data file for further offsite logging. Before going offsite again you must get a fresh copy of the data file.

6.14.4 Features List

Offsite logging only deals with the patient's clinical data. **It does not log any billing entries.** This doesn't mean that you can't generate invoices and receipts whilst offsite. You can still do this, however you would need to print out the Daily Billing Report and Daily Banking Report so that your receptionist can re-enter the billing and receipting information in the main database.

Not all clinical data can be logged. The table below shows which records can be added, deleted or modified.

Please note: As a general rule, offsite logging should not be used to create templates, menus, checklists, etc.; it is primarily designed for reviewing and modifying existing patient information, and should not be used to set up your practice workflows and procedures while away from the practice.

Table	Add	Delete	Modify
Any Billing or Account Holders	NO	NO	NO
Address Book	Yes	Yes	Yes
Address Book Letters	NO	NO	NO
Admissions	NO	NO	NO
Allergies	Yes	Yes	Yes
Allergy Choice List	NO	NO	NO
Antenatal Visits	Yes	Yes	Yes
Appointment Schedules	NO	NO	NO
Appointments	Yes	NO	Yes
Care Plans	Yes	Yes	Yes
Checklists	Yes	Yes	Yes
Checklist Templates	Yes	Yes	Yes
Consultations	Yes	Yes	Yes
Correspondence (outgoing)	Yes*	NO	Yes
Correspondence (incoming)	NO	NO	Yes

Current Problems	Yes	Yes	Yes
Documents (not letters)	Yes	Yes	Yes
Drawings	NO	NO	NO
Email	NO	NO	NO
Email Addresses	NO	NO	NO
Employers	NO	NO	NO
Eye Examinations	NO	NO	NO
Flagging Patients	Yes	Yes	Yes
Health Assessments	Yes	Yes	Yes
Healthshare	Yes***	Yes***	Yes***
Images & Attachments	NO	NO	NO
INR Control	NO	NO	NO
Interested Parties	Yes	Yes	Yes
IVF	NO	NO	NO
Journals	NO	NO	NO
Laboratory Doctor Codes	NO	NO	NO
Labels	NO	NO	NO
Laboratories	NO	NO	NO
LASIK Post-op	NO	NO	NO
Lesions	Yes	Yes	Yes
Letterheads	NO	NO	NO
Letter Templates	NO	NO	NO
Library Pictures	NO	NO	NO
Life Events	Yes	Yes	Yes
Lookup Lists, e.g. Dosage	NO	NO	NO
Macros	NO	NO	NO
Measurements	Yes	Yes	Yes
Medication Reviews	NO	NO	NO
My Health Record Information	NO	NO	NO
Obstetric History	Yes	Yes	Yes
Orthopaedic Scores	Yes	Yes	Yes
Past History	Yes	Yes	Yes
Pathology/Radiology Requests	NO	Yes	NO
Pathology Results	NO	Yes	Yes (ie. Link)
Pathology Tests List	NO	NO	NO
Patient Demographics	Yes ¹	NO	NO
Postcode Lookups	NO	NO	NO
Practice Preferences	NO	NO	NO
Pregnancies	Yes	Yes	Yes
Prescriptions	Yes	Yes	Yes
Printing Preferences	NO	NO	NO
Procedures	Yes**	Yes	Yes
Procedure Complications	NO	NO	NO

Procedure Items	Yes	Yes	Yes
Procedure Templates	NO	NO	NO
QuickReports	NO	NO	NO
QuickScript List	NO	NO	NO
Radiologists	NO	NO	NO
Recalls	Yes	Yes	Yes
Referrals	Yes	Yes	Yes
Rooms	NO	NO	NO
Social & Family History	Yes ¹	NO	NO
Sites of Service	NO	NO	NO
Tasks	Yes	Yes	Yes
Thyroid Control	NO	NO	NO
User Preferences	NO	NO	NO
Vaccinations	Yes	Yes	Yes
Vaccine List	NO	NO	NO
Workcover Claims	Yes	Yes	Yes
Workcover Certificates	NO	NO	NO

*CCs on letters are not logged and will need to be reinserted in the main database. They will be noted at the bottom of the letter but will not be recognised by Genie as a CC until reselected.

** Pending procedures linked to appointments made during offsite logging will need to be re-linked to appointments once the logs imported into the main data file. Procedures created directly from appointments will be imported, however.

*** To use Healthshare while offsite, the offsite computer must be connected to the Internet.

Notes:

1. New patient records can only be added from **Open > Patients**. New patients cannot be added from the Appointment Book. Existing demographic information cannot be changed - only new information added to an empty field in the demographic window will be logged.

2. Changes made to appointments will only be logged if 'Import changes to appts modified offsite' is ticked in **File > Practice Preferences > Miscellaneous**. Please note: this will still not affect any appointment *schedules* that have been created or modified while offsite; these will not be logged.

3. If Appointment Types are created while Offsite Logging, it is important to re-create the Appointment Type name when back on the network. The previously selected Appointment Type colour will be automatically assigned to this Type when re-created.

4. Any Merged Letter Templates or Referral/Reply Letter Templates that are created offsite should be saved to disk using the **File > Save As...** option in the template area. Then when back on the main database, imported by selecting **File > Open** in a New Template.

AS A GENERAL RULE YOU SHOULD NOT BE USING OFFSITE LOGGING TO CREATE ANY SORT OF TEMPLATES, MENUS, CHECKLISTS AS THEY WILL NOT BE LOGGED. OFFSITE LOGGING IS FOR EDITING EXISTING PATIENT INFORMATION.

6.14.5 Database Replication

Database replication allows for the synchronisation of data from the server to a laptop for use offsite, without the need for an internet connection. Database replication does not require a separate script to copy the data from the server, or for the Genie Server application to be closed while the replication is taking place.

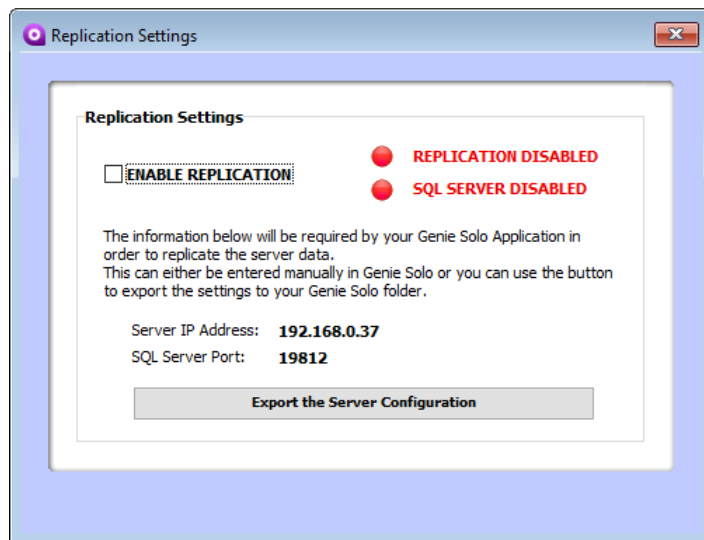
Enable Database Replication

Pre-requisites:

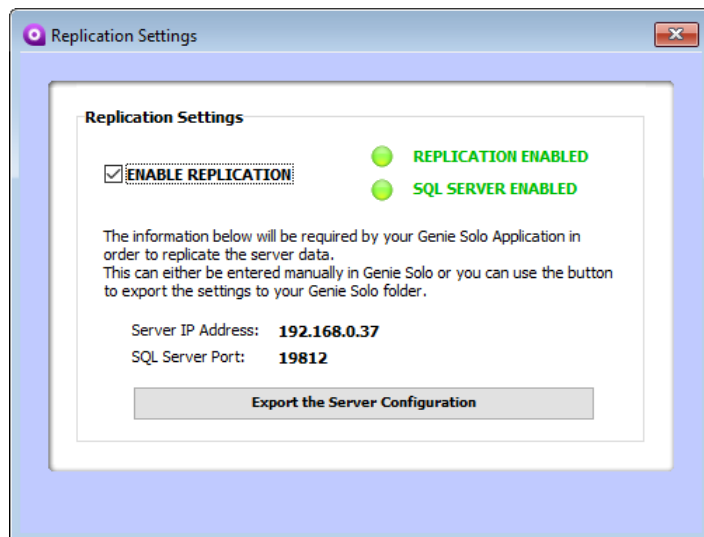
- Genie Version 8.5.9 or later (the current version of Genie is recommended).
- A password must be set for your Genie username (refer to [Passwords](#) section of this manual).
- A recent Genie data file (Genie.4DD, Genie.4DIdx, Genie.Match) must exist in the Genie folder on the offsite logging computer.

On the Genie Client (offsite logging) computer:

1. Go to **File > Maintenance and Reports** and click on the **Administrator** tab.
2. **Alt+click** on the **Create Data Copy Script** button.



3. Tick *Enable Replication*. The two indicators to the right will turn green to indicate successful activation.



4. Click on **Export the Server Configuration** to save a copy of the Server IP Address and SQL Server Port details to your computer.

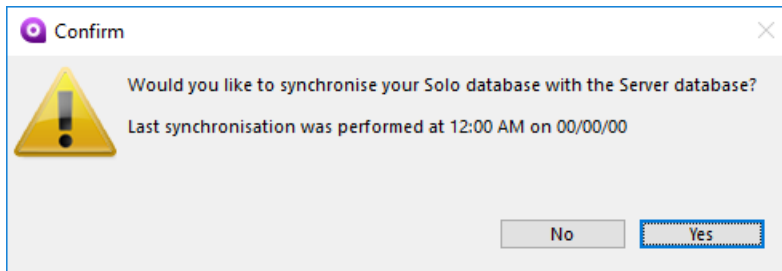
Note: If you would like to remove your saved settings at a later date, Alt+click on **Export the Server Configuration**.

Replicate the Data File

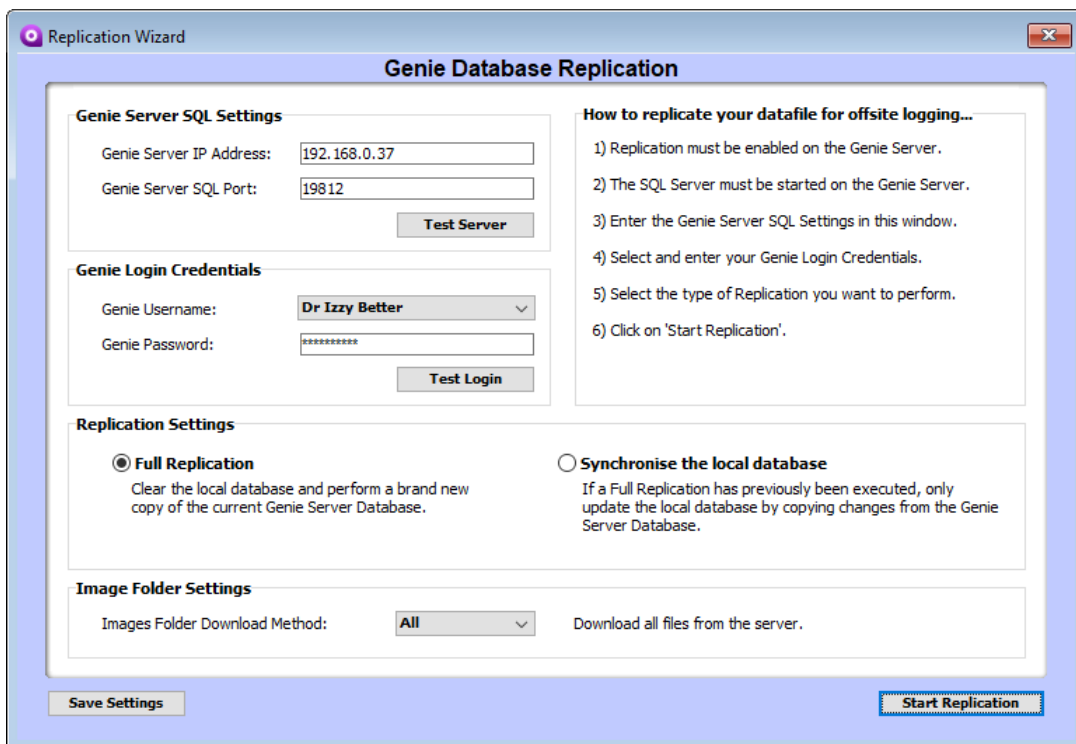
Once the replication settings have been configured and saved above, quit Genie Client and launch Genie Solo on the offsite-logging computer. The replication step must be performed before leaving the rooms to commence offsite logging.

Note: It is not compulsory to close Genie client at this stage. If you need to continue to work in Genie client while copying the data in Genie Solo, you are able to do so.

1. Provided you have an active network connection and you have not replicated the database in the last 30 minutes, you will automatically be prompted to start replication.



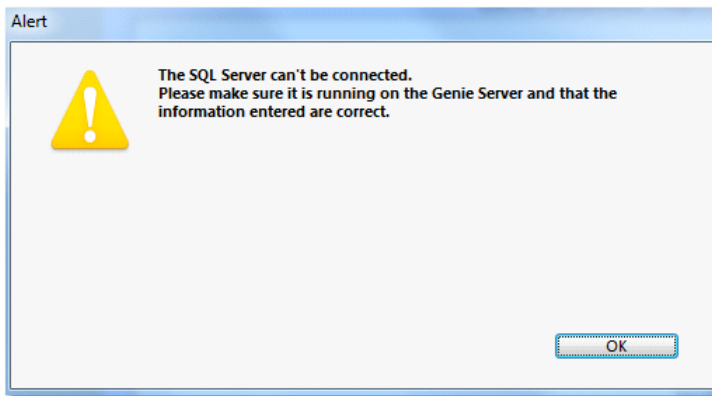
Click on Yes to open the Replication Wizard.



2. The Genie server SQL Settings will be listed if you chose the **Export the Server Configuration** option at Step 6 above. If the Server SQL Settings are blank, enter the Genie Server IP Address as shown in Genie Client, [Help > About Genie Client](#). Enter the Genie Server SQL Port as 19812.

Note: The username and password are not stored as a security measure.

3. Click the **Test Server** button to test the connection.
4. If the details you have entered are correct, you will be presented with a message 'The SQL Server Started Successfully.' You can then proceed to Step 5. If the details are incorrect, you will be presented with several errors regarding your SQL server and the prompt below.

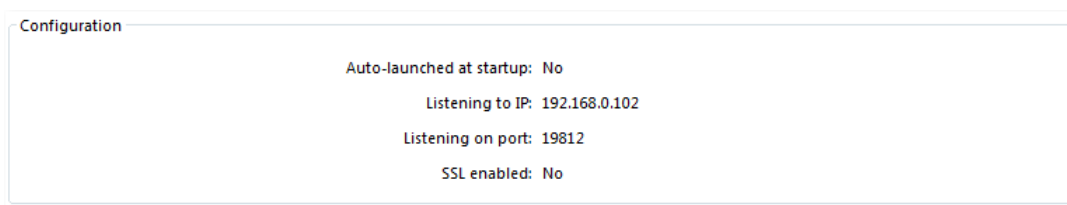


If you receive this error message, it is likely that your Server IP Address and/or Server SQL Port are incorrect. The easiest way to find these details is to click on the **SQL Server** tab in the Server Administration window. The server administration window can be accessed in the following ways:

- On the server machine: this is the main server window. If you do not see this window, go into **Window > Administration**.
- On any client machine: by going into **File > Maintenance and Reports** and click on the **Server Admin** button.



This window will display the server IP next to *Listening to IP* and the Server SQL Port next to *Listening on port*.



Write these down and enter them into the Genie SQL Server settings area in the Database Replication Wizard. Once you have entered these, click on **Test Server** again. You should now receive a prompt stating that the SQL server started successfully.

5. Select your *Genie Username* from the drop-down menu and enter the appropriate password.
6. Click the **Test Login** button to confirm that the credentials you have entered are correct.
7. Once the server and login have been successfully tested, click on **Save Settings**. The settings are now saved for future use.

Note: This will not save your password. Your password must be entered each time as a security measure.

Replication Settings

If you are copying the database for the first time, you will need to select *Full Replication*. This option may take some time as it is copying all of your Genie data.

For each subsequent copy, you will be able to select *Synchronise the local database*, which will only copy over any information that has changed since you last copied the data. This option is significantly faster.

Replication Settings

☒ **Full Replication**
Clear the local database and perform a brand new copy of the current Genie Server Database.

☐ **Synchronise the local database**
If a Full Replication has previously been executed, only update the local database by copying changes from the Genie Server Database.

Image Folder Settings

If you are copying the images for the first time, *All* will be selected automatically. This option will copy the entire Images folder from the server. Depending on the size of your images folder, this may take quite some time.

Note: It is possible to take a manual copy of your images folder (via USB or other external media device) and place this in the Genie folder on your laptop. This can make the data replication process faster; however, we always recommend using the Replication Wizard as it is more reliable.

Once you have done the initial copy (or if you have manually copied your images), you will be able to select *New*, which will only copy any new images that have been added/modified since you last copied the data. This option is significantly faster.

If there is no requirement to access images and attachments offsite, select *None*.

Image Folder Settings

Images Folder Download Method:

All
New
All
None

Save Settings

Start the Replication

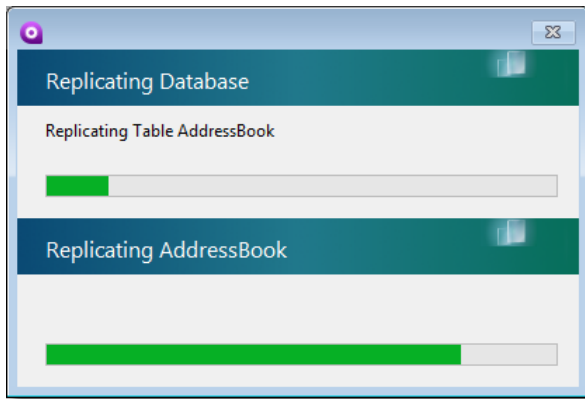
Click on **Start Replication** at the bottom of this window. If you have selected *Full Replication*, you will be presented with the following window.

Confirm

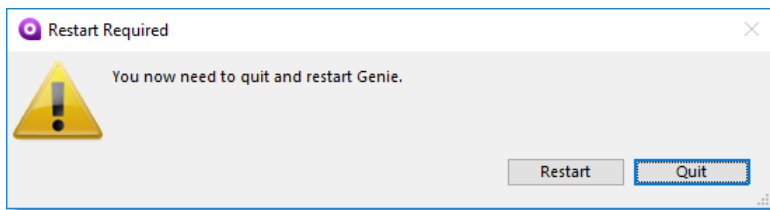
 This process will delete all the records from the local database. Do you want to continue?

Cancel Yes

Click **Yes** to confirm and start the replication. During the replication, you will see a number of flashing windows as shown.



Once the replication is complete, you will receive the prompt below.

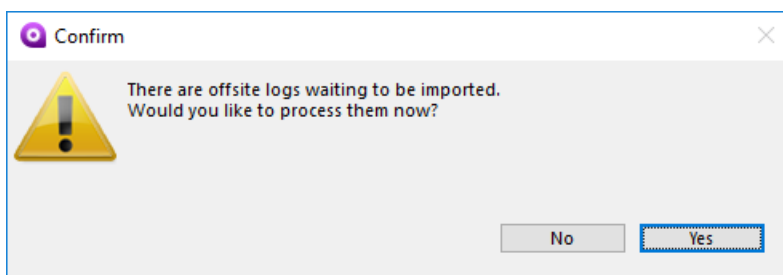


Your local copy of the database is now up to date. Click on **Restart** to launch Genie Solo to check and test that you can start offsite logging successfully.

Offsite Logging

The procedure for offsite logging in Genie is the same, regardless of whether you copy the data via a Copy Data Command or via Database Replication. Please follow the steps below each time you wish to use offsite logging:

1. Before leaving the rooms, launch Genie Solo and select **Yes** when prompted to start replication.
2. Configure and perform the replication by following the instructions above.
3. When the replication is complete you will be prompted to restart Genie. Select **Restart**.
4. When Genie relaunches, log in to confirm your data has been successfully copied from the server.
5. When ready to start offsite logging at your offsite location, open Genie Solo and confirm the prompt to start offsite logging.
6. Once you have finished offsite logging, close Genie Solo and return to the rooms to import offsite logs.
7. Open Genie client and you will receive a prompt, which will allow you to import your offsite logs.



For more information on offsite logging, please see the sections [Running an Offsite Log](#) and [Importing Logs](#).

6.15 Synchronising With Outlook/iCal

Genie can synchronise your appointments, tasks and address book records with Outlook on Windows, and iCal and the Apple Address Book on Mac.

Note: If you are using OSX 10.8 or higher, the appointments will synchronise with the Calendar

application, the tasks will synchronise with the Reminder application and the Address Book will synchronise with the Contact application.

This synchronisation can occur in two directions:

- From Genie to the relevant application, or
- From Genie to the relevant application and from the relevant application to Genie.

Below is a summary of what Genie features can be synchronised and in which directions:

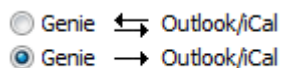
Macintosh					
Two way			One Way		
Appointments		iCal	Appointments		iCal
Tasks		iCal	Tasks		iCal
			Address Book		Apple Address Book
Windows					
Appointments		Outlook Calendar	Appointments		Outlook Calendar
Tasks		Outlook Tasks	Tasks		Outlook Tasks
			Address Book		Outlook Address Book

To set up the synchronisation, you must be logged in as the user that would like their appointments, tasks or Address Book synced. In addition to this, Windows users must manually create a category in Outlook called GenieSync. Mac users do not need to do this as Genie will automatically create GenieSync when you synchronise the Appointment Book.

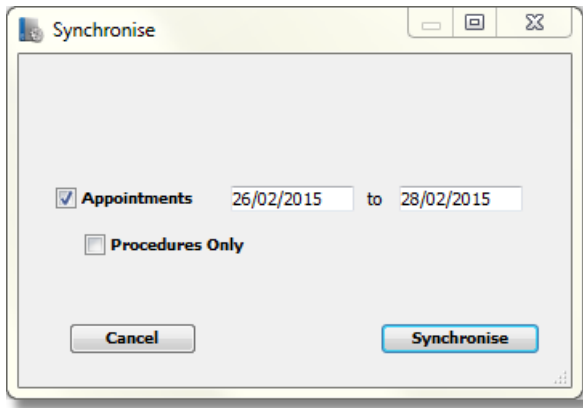
Appointments

For appointments to be synchronised they must either be a patient appointment, or a non-patient appointment where the name is not equal to an appointment type. Therefore, a group of appointments which you have blocked off using the *Appointment Type* drop-down menu will not be synchronised.

To set up the synchronisation, go to **File > User Preferences**, click on the **Clinical** tab and select the relevant option to sync either one or both ways.



To synchronise your appointments, go to **Appt > Sync with Outlook (Appts > Sync with iCal)**. In the Synchronise window that appears, tick the *Appointments* option, specify the date range of appointments to sync and if you would like to only show appointments with a procedure, then click **Synchronise**.



When creating appointments in Outlook or iCal, you must classify them as GenieSync so that they will synchronise back into Genie.

Your appointments will now appear in Outlook or Calendar.

Tasks

For tasks to be included in the synchronisation, you must tick the *Sync with Outlook (Sync with iCal)* checkbox in the Edit Task window at the time of creation.

To synchronise your tasks, go to **Appt > Sync with Outlook (Appts > Sync with iCal)**. In the Synchronise window tick the *Tasks* option and click **Synchronise**.

When creating tasks in Outlook or iCal you must categorise them as GenieSync so that they will synchronise back into Genie.

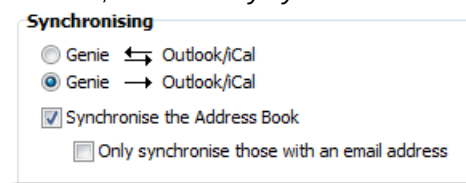
Note: You must not use Return characters in the Notes field of a To Do/Task in iCal as this will result in an extra blank task being created.

Your tasks will now appear in Outlook or iCal.

Address Book

The synchronisation of Address Book records occurs only in one direction; from Genie to Outlook or the Apple Address Book. This means, any records added into Outlook or the Apple Address Book will not be copied back into Genie. Also, not all the fields used in Genie will be copied to Outlook or the Apple Address Book.

To synchronise your Appointment Book records, go to **File > User Preferences**, click on the **Clinical** tab and tick the *Synchronise the Address Book* checkbox. If you only want to synchronise addresses with an email address, tick the *Only synchronise those with an email address* checkbox as well.



The next time that you add a new Address Book record or open an existing record, this will be added to your Outlook or Apple Address Book list.

Limitations:

- Items deleted from iCal/Outlook will not be deleted from Genie.
- Items created in iCal/Outlook more than two weeks prior to the current sync will not be created in Genie.

Part



VII

Practice Management

7 Practice Management

The following sections are most relevant to Practice Managers.

Maintenance and Reports

This section contains data maintenance routines that maintain the database and can fix many data issues. It also has multiple Practice Management reports such as [doctors' earnings](#) and items billed. Monthly tasks such as [overdue accounts](#) are also performed through Maintenance and Reports.

Archiving

This section explains how best to maintain your data and keep it at a minimal size.

Queries and Searches

This section describes how to perform basic and more complex searches on your data that go beyond those outlined in Maintenance and Reports.

Quick Reports

This section takes searches to the next level and produces reports that can pull information from multiple tables in the database.

Email

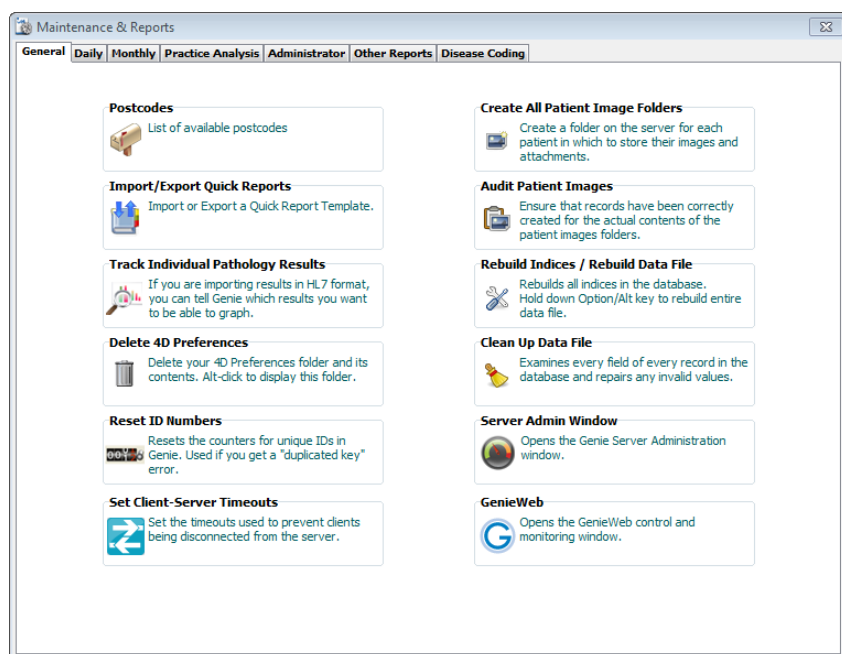
This section explains the setup and use of the basic email program in Genie that can be used to email correspondence and attach incoming emails to patients files.

Note: This email system is a legacy feature and is not intended to replace Outlook Express or Apple Mail.

7.1 Maintenance and Reports

Maintenance and Reports is accessed via **File > Maintenance & Reports**.

7.1.1 The General Page



Postcodes

Lists all the postcodes that have been entered into Genie.

Import/Export Quick Reports

This allows you to export or import QuickReport templates that have been created in Genie. This is useful if you want to use a template that another Genie user has created, or vice versa. When you click the **Import/Export**

Quick Reports icon you will be asked if you want to export or import a Quick Report.

Clicking the **Export** button will prompt you to select the template from your data file to export. This will be saved in the Genie folder of the computer you are using as two files: the QuickReport itself (e.g. Future Appointments) and a 4QR resource file (e.g. Future Appointments.4QR). You will only need to use the QuickReport file. You can then attach this file to an email and send it to another user.

	Future Appointments	23/07/2015 2:34 PM	File	3 KB
	Future Appointments.4QR	23/07/2015 2:34 PM	4D Quick Report	0 KB

Clicking the **Import** button will allow you select the QuickReport to import into your data file. In the window that appears, navigate to the location where you have saved the QuickReport file, select the file and click **Open**. This template will now be available when you go to **File > QuickReports** and click **Load**.

Note: The name of the QuickReport will be the same as it is in the data file. Changing the name of the file will not change the name of the QuickReport once it is imported.

Track Individual Pathology Results

This allows you to specify which results to individually track if your laboratory is sending results in HL7 format, rather than PIT format.

This feature will only work if:

1. Your local laboratory is transmitting results in HL7 format, AND
2. Your local laboratory is using the universal LOINC codes to identify specific tests.

Some laboratories do not transmit the universal LOINC code. If this feature is not working for you, then speak with your local laboratory. It is not possible for Genie to include each laboratories codes.

If you select any tests in this window, then a separate record will be created at a time of importation. This record will contain the numeric value of the result, which can then be graphed for each patient who has had this test performed.

You can select or deselect tests at any time, however, while a test is deselected, any results coming in will not be stored so as to be able to be graphed.

If a test is selected, relevant results will only be able to be graphed from the date of selection. In short, this function is NOT retrospective.

Space Consideration: Bear in mind that a separate record will be created for every specific result that you select. For example, if you select creatinine, glucose, cholestrol & triglycerides to be tracked, then FOUR separate records will be created with every E/LFT you perform, as well as the main result record.

Although this is well within Genie's capabilities, backups and data file rebuilds may take longer to perform. Since the only advantage to this feature is the ability to graph specific results you should ONLY TRACK TESTS WHICH WOULD BE MEANINGFUL OR USEFUL AS A GRAPH.

Delete 4D Preferences

Deletes your 4D Preferences folder and its contents, this can help solve a number of problems. After you click the button, Genie will automatically quit on your computer, delete the 4D Preferences folder, and then restart Genie.

Reset ID Numbers

Clicking on this icon resets the counters used to generate unique IDs in Genie. This can be used if you get a 'failure to save non-unique data' error.

Client-Server Timeouts

Opens the Network Timeout Settings window. In this window, three slider bars can be altered to decrease the likelihood of being disconnected in Genie.

Normal Operation: Controls the timeout between the client and server computer during normal operations (e.g. navigating the appointment book, entering clinical information). This can be *increased* if you are experiencing dropouts during normal use.

Long-Running Commands: Controls the timeout during long running commands (i.e. processes that have been previously susceptible to timeouts). This can be *increased* if you are experiencing dropouts when transmitting HIC online transmissions.

Idle Connections: Controls the timeout for DB4D and SQL connections. These connections are different to application connections in that transmissions are not constant. If your intermediate routing device (router,

firewall, wireless access point etc) has a shorter timeout than this setting, it may identify and close these connections. As the connection has not been closed by Genie itself, Genie will then attempt to reuse this connection and encounter an issue. This can be *decreased* to ensure Genie closes the connection before your router or firewall interferes.

For more information about any of these three sliders, click on the **Information** button  to the left of the relevant slider.

Note: Any changes made in this window will take effect the next time the Genie server application is restarted.

Create All Patient Image Folders

Creates a folder on the server for each patient in which to store their images and attachments. This is used if you do not use ImagePro or attachments in Genie and prefer to attach files to patients directly into their folder on the server.

Audit Patient Images

Ensures that references have been correctly created for the actual contents of the patients' images. This works in a similar manner to the **Synchronise** button in a patient's Image Browser except that it does this for every patient. IT DOES NOT DELETE IMAGES, it only deletes any invalid references to images that no longer exist on the server or creates references for new images. ImagePro should do this on its own, but in some circumstances it does not.

Note: This needs to be run in the Single User mode, on the Server and may take considerable time, depending on the number of patients and images.

Rebuild Indices/Rebuild Data File

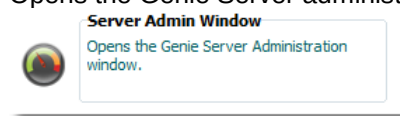
The rebuild indices function will rebuild all indices in the data file and can resolve many data corruption problems. **Alt+clicking** on the **Rebuild Indices** icon will rebuild the data file by exporting and then importing all records. This process can take a long time to complete but it is gentler and produces a better result than other repair options. However, you must shut down Genie Server and log into Genie Solo on your server to run this process. The rebuild data file should only be performed at the instruction of Genie staff.

Clean Up Data File

Examines every field of every record in the database and repairs any invalid values. Both this and a rebuild indices can be done on occasion as maintenance to help prevent data corruption.

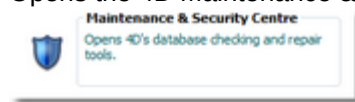
Server Admin Window (Genie Client Only)

Opens the Genie Server administration window on the server.



Maintenance & Security Centre (Genie Solo Only)

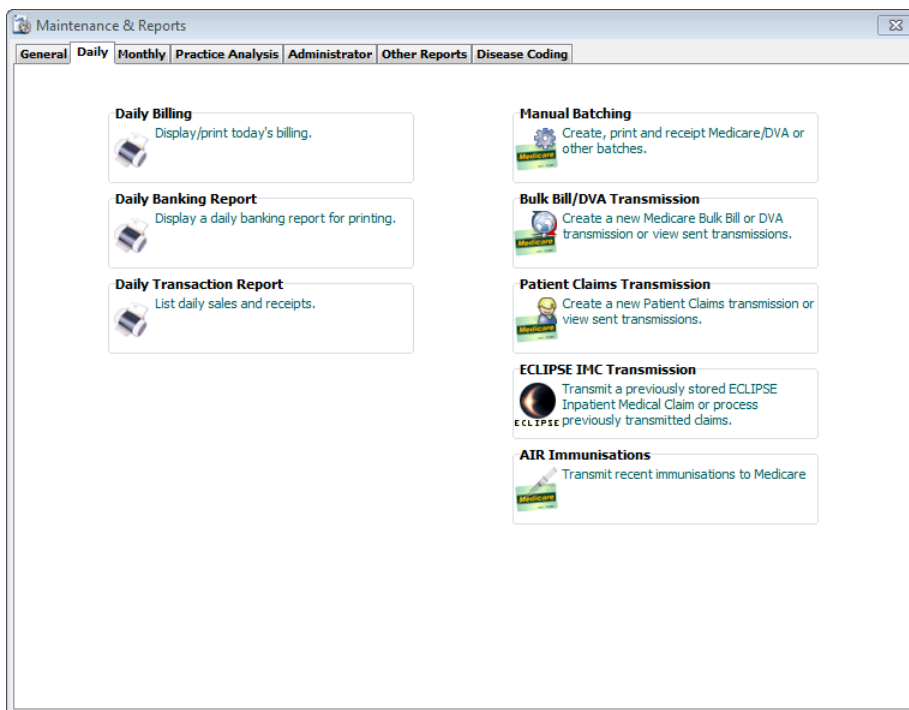
Opens the 4D Maintenance & Security Centre to allow for data repair and compacting.



Genie Web (Genie Client Only)

Opens the GenieWeb control and monitoring window. See GenieWeb Control Window for more information.

7.1.2 The Daily Page



Daily Billing Report

The Daily Billing Report lists all the items invoiced on a particular day.

Date	Patient Name	Provider ID	Item No	Description	Total Fee	Discount	Payment	Credits	Balance
05/08/2016	CLINTON, Cedilia	Dr Miranda Lawson	104	Specialist, referred consu	\$90.00		\$90.00		
05/08/2016	CLINTON, Rohan	Dr Miranda Lawson	15550	Simulation for three dime	\$691.50		\$410.00		\$281.50
05/08/2016	Marquez, Mimi	Dr Miranda Lawson	105	Professional attendance l	\$45.00		\$45.00		

The report can be printed by clicking on the **Printer** icon. In a multi-doctor practice you can select the *Provider* to display just that doctor's billing for the day. The *Show Reversals* checkbox allows you to display or hide credits. To view the billing for previous days click the date arrows or select the date in the popup calendar.

Note: If you view billing from previous days, then the Payment column does not necessarily correspond to what was actually received on the day the invoice was created. The Payment column is showing what has been receipted against the item at any time since it was originally invoiced.

Daily Banking Report

See [Banking](#) in the Reception Module for information.

Daily Transaction Report

The Daily Transaction Report displays all transactions for that day including invoices, receipts, credits and reversals. This report can display all transactions or just transactions involving a particular doctor. Individual provider reports will also include any assistant fees.

[illegible]

Manual Batching

Please see the [Manual Batching](#) chapter for more information.

Bulk Bill/DVA Transmission

Please see [Bulk Bill and DVA Claims](#) for more information.

Patient Claims Transmission

Please see [Patient Claims](#) for more information.

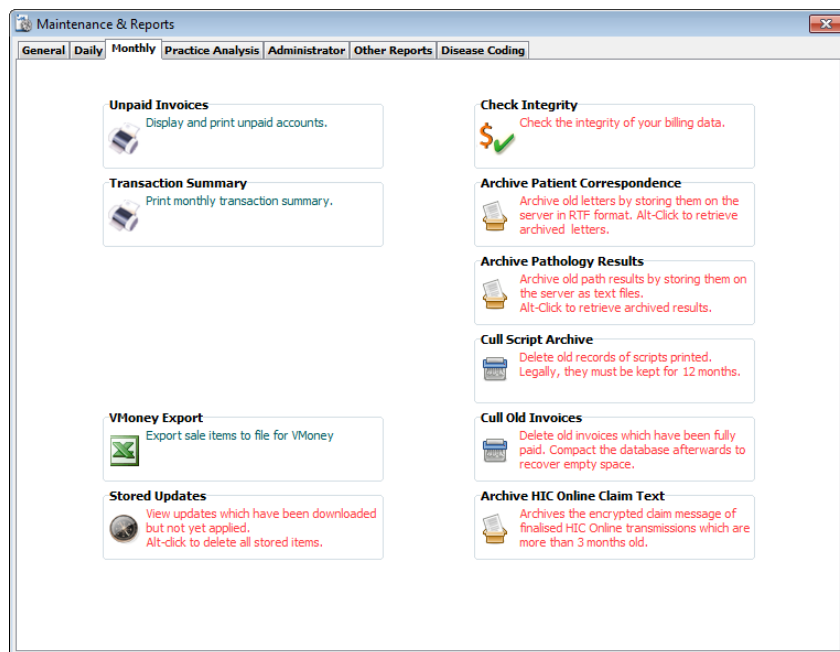
Eclipse IMC Transmission

See separate Eclipse manual for further information. This would have been provided at the time of your Eclipse Install. Alternatively, it can be accessed via **Special > Software Updates > PDFs**.

ACIR Immunisations

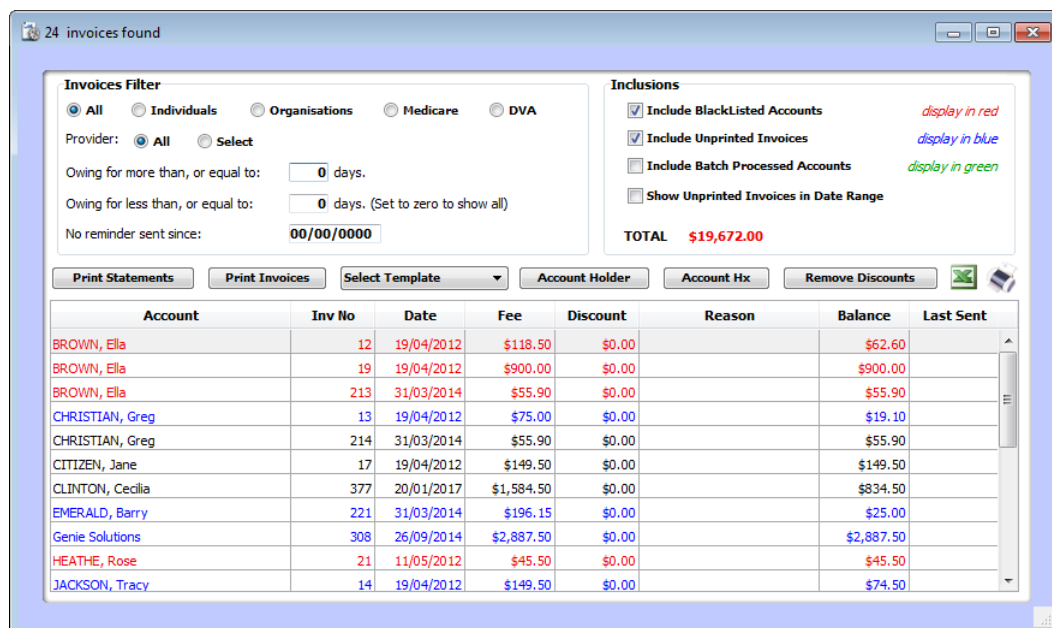
Allows you to create transmissions for sending Immunisation records to AIR. For information on how to record, manage, and transmit vaccinations, please see [Vaccinations](#).

7.1.3 The Monthly Page



Unpaid Invoices

Unpaid Invoices contains all deferred and overdue invoices.



You can choose to display all invoices at once, or divide them by account holder type. You can also select whether you wish to display blacklisted accounts, unprinted invoices and batch processed accounts (eg Medicare) by placing a tick in the box beside these options. The accounts displayed will be those with an invoice date that falls in the time period stipulated in the 'Owing for more than' and 'Owing for less than' fields. The *Reason* column displays the reason for a discount, if one has been given, indicated by an amount in the *Discount* column. Discounts are applied through the account history.

To print or export the list

Use the  and  icons to export the list - exactly as it appears - as an Excel spreadsheet or print it, respectively.

To print a copy of an invoice

Highlight the record and select **Print Invoice**.

To print deferred invoices

Place a tick in the *Include Unprinted Invoices* tickbox. To then print these invoices, highlight the first invoice and **Shift+click** to highlight the last record, and then click **Print Invoices**. Selecting this option will re-print each individual invoice. If you **Alt+click** on **Print Invoices** it will combine all invoices onto the one and give it today's date as the Invoice Date.

To print a statement for an account holder

Highlight the first record, and **Shift+click** on the last record, then select **Print Statement**. A statement will print showing all outstanding items. If the original print date of the invoice is greater than 30, 60, 90 or 120 days, an account message will appear on the bottom of the statement. Where there are multiple invoices on the one statement, the account message that applies to the oldest invoice will be displayed. To edit these account messages, go to **Open > Account Messages**.

Where the selected invoices are for more than one practice, a separate statement is printed for each practice so that the correct letterhead is used. This behaviour can be over-ridden by ticking the *Use Single Letterhead for Statements* checkbox on the Practice Preferences Practice Letterhead tab. In this case, the letterhead for one of the practices is used for all invoices on the statement, regardless of which practice they were billed for.

Note: While invoices will be displayed by invoice date, Genie will use the print date to determine how overdue an invoice is. This is because Genie assumes that an invoice cannot be overdue until it has been printed and given to the Account Holder.

To print a reminder letter

Highlight the invoice and select the applicable letter template from the drop down list to the right of the **Print Invoices** button. Please note: This reminder letter must first have been created as a merged letter template.

Both the Account Holder record and the Account History window can be accessed from this screen by highlighting a record and selecting the relevant buttons. You can also remove any discounts which may have been previously applied to an account by selecting the record and then clicking on the **Remove Discount** button.

Transaction Summary

Displays all the transactions for the selected month for all or a selected provider. This report is similar to the [The Daily Transaction Report](#) in the **Daily** tab.

VMoney Export

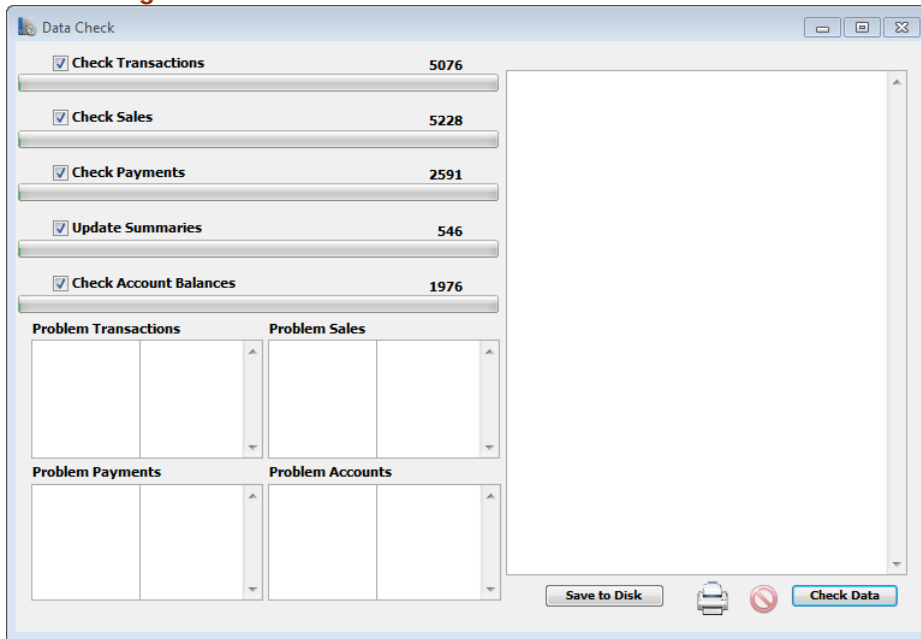
Exports sale items ready for use with VMoney. The button for this report will only appear if your state is set as NSW in your Practice Preferences (**File > Practice Preferences**, double-click the clinic name). To use the VMoney Export feature, you must be running version 8.8.5 of Genie. You must also have a Medical Registration Number entered in your User Preferences (**File > User Preferences**).

Stored Updates

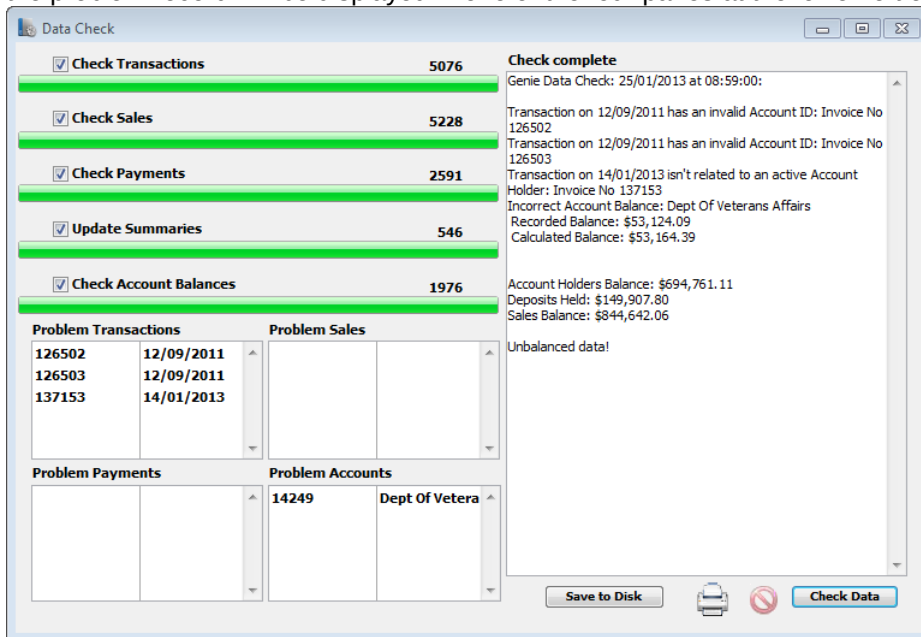
This will show a list of all updates that have been stored for later activation eg. fee schedules. The user that performed the download will be alerted on the activation date when they log in as to whether they would like to apply the update, or they can be done at any stage through this button.

Check Integrity

Note: This should be performed before any Income/Billing reports are printed or analysed, to ensure accurate figures are obtained.



Click the **Check Data** button. Genie will check all the billing records in the data file. If it finds any discrepancies, the problem record will be displayed in one of the four panes at the lower left of this window.



You can then double-click on the item to open the record and fix whatever is wrong. You can leave this window running while you open the Patients or Account Holders list to examine their account history. If there is an Account Holder with an incorrect balance, you can double-click on it to open the Account Holder's record, and then click the **Update Balance** button to correct this.

This process also updates the summary records. A Summary Record is kept for each provider for each calendar month. It keeps a running tally of all invoice and receipt totals. These summaries are used to display the Billing vs. Income report, so it is advisable to run at least the *Update Summaries* section of the Integrity Check before making payments to providers based on their billings or receipts.

You can view the Summary Records by clicking on the **Summary Records** button in the Billing vs. Income Report window. You can print the Summary records using a QuickReport for the [Summary] table (see

[QuickReports](#) for more information).

Archive Patient Correspondence

Archives old letters by storing them in the patients images folder on the server in RTF format. You will be prompted for the cut off limit once you click the **Garbage can** button. See the [Archiving](#) chapter for more information on this and Archiving Pathology Results.

Archive Pathology Results

Archives old pathology results by storing them in the patients images folder on the server as text files. You will be prompted for the cut off limit once you click the **Garbage can** button.

Cull Script Archive

Deletes patients' script archives in the Clinical Window from the database. You will be prompted for the cut off limit once you click the **Garbage can** button.

The Script Archive is a table containing copies of every prescription printed. It is a legal requirement that a copy of all printed prescriptions be retained for 12 months (24 months in some states). After that you can delete them to free up space in the database. Note that this does not delete any of the prescriptions in the patient's current medication list.

Cull Old Invoices

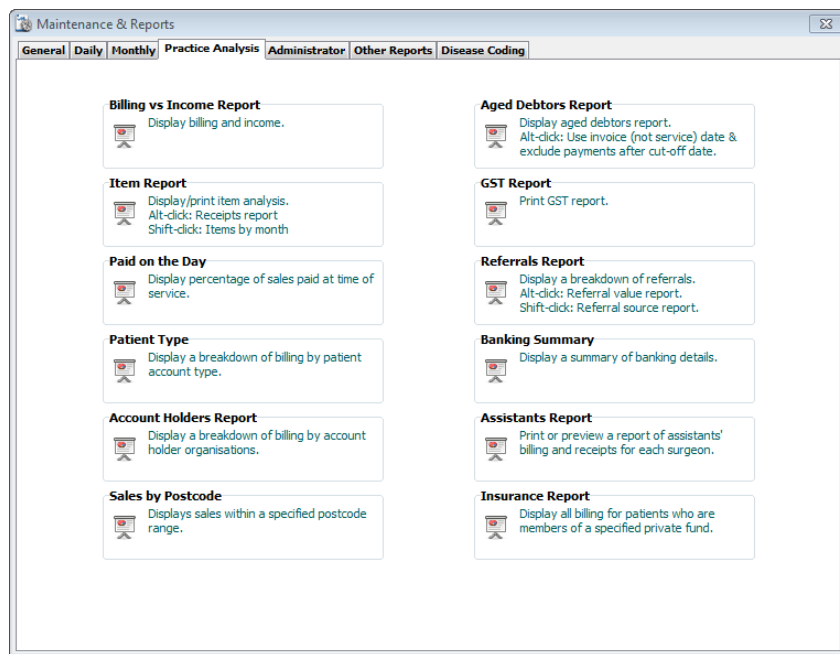
Deletes old invoices which have been fully paid. Afterwards the database will be compacted to recover empty space.

Archive HIC Online Claim Text

Archives the encrypted claim message of finalised HIC Online transmissions which are more than 3 months old. Archived transmissions are stored in Genie\HICOnline\ArchivedTransmissions.

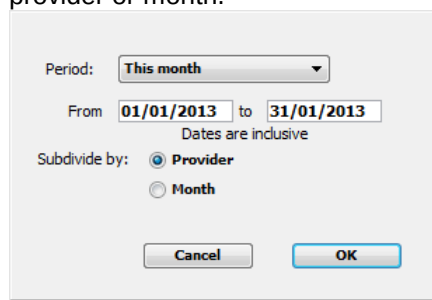
Note: Patient records are Archived through **Open > Patients, Patients > Cull Records**. See [The Patients Menu](#) for more detail.

7.1.4 The Practice Analysis Page



Billing vs Income Report

This is the main report in Genie and is the one that should be used for determining providers' pays/dividends. You can specify any date period you like by selecting one of the set date options, or by selecting *Custom Date*, which allows you to enter any date range you like. You can specify whether the report should be divided by provider or month.



For each provider in the practice, this report will detail billing and receipts, including GST totals.

Note: The GST amount indicated in the Billing vs Income report may vary when compared to GST amounts in other reports in Genie, over the same period of time (i.e. the GST in banking report). This is due to the fact that if an account which includes GST is deleted, and the Banking batch in which it is contained is sealed, then the Banking report GST amount is not updated to reflect this deletion, whereas the GST reported in the Billing vs Income report is.

Billing vs Income Report: 1/01/2013 to 31/01/2013

Print Breakdown Print Sales Print Receipts Summary Records Close

Provider	Billing	GST	Credits	Discounts	Nett Billing	Receipts	GST	Difference	Inv
Dr Andrew Largeman	\$226.50	\$0.00	\$0.00	\$0.00	\$226.50	\$0.00	\$0.00	\$226.50	3
▶ Dr Geeven	\$154.00	\$0.00	\$0.00	\$0.00	\$154.00	\$0.00	\$0.00	\$154.00	4
♦ Geeven's Pathology Centre	\$38.50	\$0.00	\$0.00	\$0.00	\$38.50	\$0.00	\$0.00	\$0.00	0
♦ Geeven's Rooms	\$38.50	\$0.00	\$0.00	\$0.00	\$38.50	\$0.00	\$0.00	\$0.00	0
♦ Genie Medical Centre	\$77.00	\$0.00	\$0.00	\$0.00	\$77.00	\$0.00	\$0.00	\$0.00	0
Total	\$380.50	\$0.00	\$0.00	\$0.00	\$380.50	\$0.00	\$0.00	\$380.50	7

Note: It is strongly recommended to perform an [Integrity Check](#) before using any figures in the Billing vs Income Report to ensure accuracy of the figures.

Billing: This first column shows the gross billing, and includes invoices which have subsequently been credited. It also includes any GST amounts.

Credits: This column shows the total amount of credits applied to invoices.

Discounts: This column shows the total amount of discounts applied to invoices.

Net Billing: Equals gross billing less GST less credits, less discounts, and is therefore the real, actual billing for the practice that this provider has performed.

Receipts: This column shows the total amount that has been receipted to this provider for the time period selected, and includes any GST.

Difference: This figure is the difference between the **Billing** amount and the sum of the **Receipts**, **Discounts**, and **Credits** figures.

Inv: This shows the number of invoices billed to this provider for the selected period. Remember that this is not necessarily the number of patient contacts.

Highlight the doctor's name for the below buttons to become available:

Print Breakdown: This will print a more detailed breakdown of invoices and receipts, including a breakdown between bulk-billed Medicare and DVA, private and other organisation billing and receipting.

Print Sales: Prints all the items invoiced during the selected time period.

Print Receipts: Prints all the receipts for the selected time period, whether the actual invoice was created during this time period or not.

Summary Records: Displays the Summary records for each provider. These are updated during a Data Integrity Check (See [Check Integrity](#) for more information). They can be printed using a QuickReport ([File > QuickReport](#)), and selecting the [Summary] table.

To display the billing by Site of Service click the **black arrow** next to the doctor's name.

Billing vs Income Report: 1/01/2013 to 31/01/2013

Print Breakdown Print Sales Print Receipts Summary Records Close

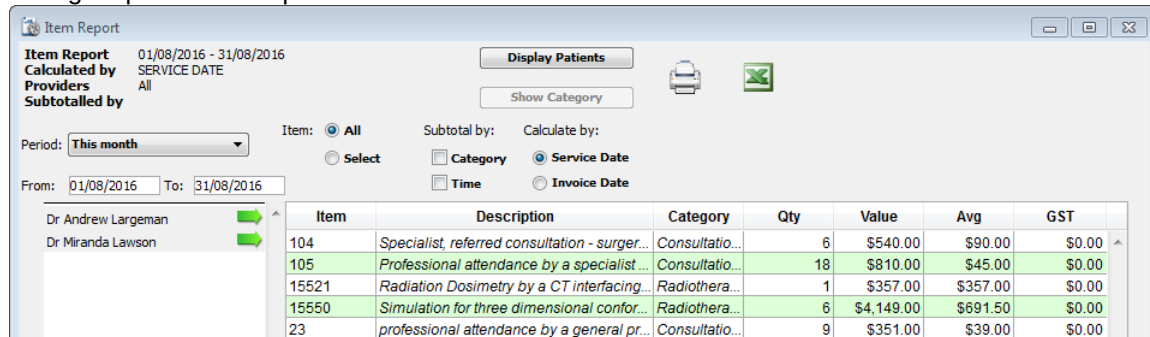
Provider	Billing	GST	Credits	Discounts	Nett Billing	Receipts	GST	Difference	Inv
Dr Andrew Largeman	\$226.50	\$0.00	\$0.00	\$0.00	\$226.50	\$0.00	\$0.00	\$226.50	3
▶ Dr Geeven	\$154.00	\$0.00	\$0.00	\$0.00	\$154.00	\$0.00	\$0.00	\$154.00	4
♦ Geeven's Pathology Centre	\$38.50	\$0.00	\$0.00	\$0.00	\$38.50	\$0.00	\$0.00	\$0.00	0
♦ Geeven's Rooms	\$38.50	\$0.00	\$0.00	\$0.00	\$38.50	\$0.00	\$0.00	\$0.00	0
♦ Genie Medical Centre	\$77.00	\$0.00	\$0.00	\$0.00	\$77.00	\$0.00	\$0.00	\$0.00	0
Total	\$380.50	\$0.00	\$0.00	\$0.00	\$380.50	\$0.00	\$0.00	\$380.50	7

Printing the Billing vs Income Report

Use the **Printer** button  to print and the **Graph** button  to graph the Billing v Income report.

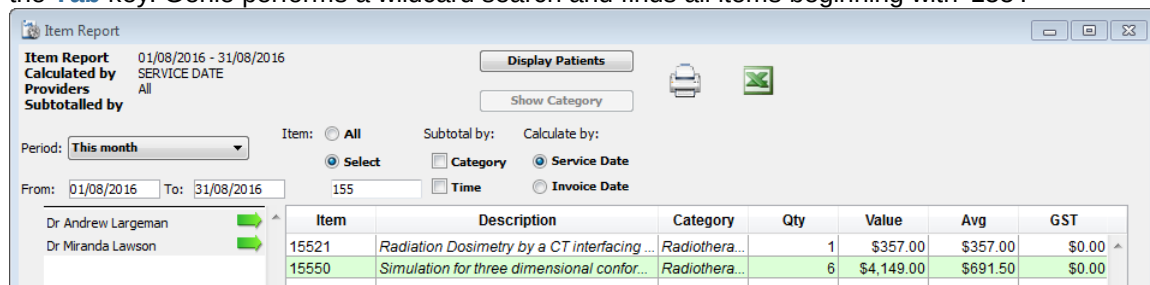
Item Report

This report displays the number, total value and average fee for either all items, or a selection of item numbers during a specified time period.



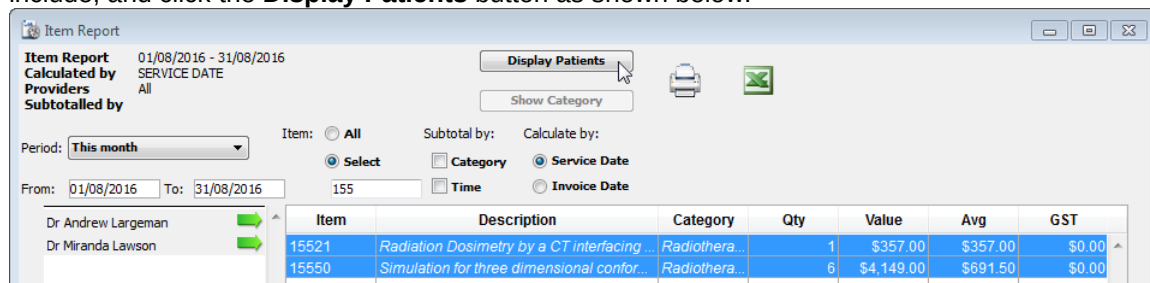
Item	Description	Category	Qty	Value	Avg	GST
104	Specialist, referred consultation - surger...	Consultatio...	6	\$540.00	\$90.00	\$0.00
105	Professional attendance by a specialist...	Consultatio...	18	\$810.00	\$45.00	\$0.00
15521	Radiation Dosimetry by a CT interfacing...	Radiothera...	1	\$357.00	\$357.00	\$0.00
15550	Simulation for three dimensional confor...	Radiothera...	6	\$4,149.00	\$691.50	\$0.00
23	professional attendance by a general pr...	Consultatio...	9	\$351.00	\$39.00	\$0.00

For example, to find all procedure items starting with '155' click on the **Select** button and enter '155', then press the **Tab** key. Genie performs a wildcard search and finds all items beginning with '155'.



Item	Description	Category	Qty	Value	Avg	GST
15521	Radiation Dosimetry by a CT interfacing ...	Radiothera...	1	\$357.00	\$357.00	\$0.00
15550	Simulation for three dimensional confor...	Radiothera...	6	\$4,149.00	\$691.50	\$0.00

To find which patients have actually been charged for these item numbers, highlight the item(s) you would like to include, and click the **Display Patients** button as shown below.



Item	Description	Category	Qty	Value	Avg	GST
15521	Radiation Dosimetry by a CT interfacing ...	Radiothera...	1	\$357.00	\$357.00	\$0.00
15550	Simulation for three dimensional confor...	Radiothera...	6	\$4,149.00	\$691.50	\$0.00

The total of fees charged for all item numbers may not necessarily be the same as shown in the Billing vs Income report. This is because, if you create an invoice for an item worth \$100, then fully credit it because it was billed to the wrong patient, then that item will not be included in the Item Report and the total will be \$100 less than the total in the Billing vs Income report. This is deliberate, because otherwise the number of times that item has been billed would be incorrect, and the average fee would be skewed downwards.

Items can also be subtotalled by *Category* or *Time*. The total time is calculated as the *Usual Time* field for each billing item (as per [Open > Billing Items](#)), multiplied by Qty column. Category is taken from the Category entered for the item in [Open > Billing Items](#).

The report can be exported to Excel using the **green X** icon at the top of the window.

Paid on the Day

This report displays the percentage of income which is actually paid on the day. It may be useful if a discount is offered for payment on the day, in which case you can see if it has had the desired effect.

Patient Type

This displays a breakdown of invoicing by patient type. This is determined by the *Account Type* selected in the

patient's demographics, regardless of how the patient is invoiced (e.g. if the patient is classified as Private, yet you invoice them to Workcover, this will still be calculated under the Patient Type of Private).

Account Holders Report

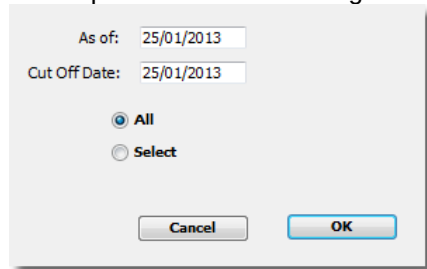
Displays a breakdown of billing by account holder and organisations such as Workcover, health funds, Medicare and Private Accounts. The Account holder is determined by who the invoice is made out to (e.g. if the patient is classified as Private, yet you invoice them to Workcover, this will be calculated against Workcover).

Sales by Postcode

Displays sales within a specified postcode range. These can be grouped and exported to Excel if need be.

Aged Debtors Report

This report shows outstanding debts, subdivided by current, 30, 60 days, etc.



There are two types of aged debtor reports:

1. By service date
2. By invoice date: to run this report Alt+click on the **Print** icon

Aged debtors by service date

The 'Cut off' date is used to determine which services are included in the report. Any services after the 'Cut off' date are excluded from the report.

The 'As of' date is used to calculate the age of the debtors listed. For example, if you set the 'Cut off' date at 31/12/2012 and set the 'As of' date at 31/03/2013, any debts which were current at 31/12/2012 are still outstanding at 31/03/2013 would be shown 90+ column.

Any report produced after the 'Cut off' date will reflect payments made between the 'Cut off' date and the date it is printed. For example, assuming:

- A 'Cut off' date of 31/12/2012 and book debts of \$15,000 at this date
- Payments of \$13,000 received between 31/12/2012 and 31/03/2013.

A report printed on 31/03/2013 would have net book debts of \$2,000.

Aged debtor report by invoice date

The 'As of' date will produce a report by invoice date as if it were produced on the date selected. All invoices dated up to and including the 'As of' date are included in the report.

The report ignores payments and credits raised after the 'As of' date. For example, assuming:

- An 'As of' date of 31/12/2012 and book debts of \$15,000 at this date
- Payments of \$13,000 received between 31/12/2012 and 31/03/2013

A report printed on 31/03/2013 would have net book debts of \$15,000 - being the debts outstanding at 31/12/2012.

Facts about both types of aged debtor reports

1. Neither report restores:

- Deleted invoices
- Deleted payments or
- Adjustments to fee amounts

Where these deletions or adjustments occur:

- After the 'Cut off' date (in the case of aged debtor reports by service date) or
- After the 'As of' date (in the case of aged debtor reports by invoice date)

For example, assuming:

- A 'Cut off' date of 31/12/2012 and book debts of \$15,000 at this date
- \$500 worth of invoices that were outstanding at 31/12/2012 but subsequently deleted

A report run on 31/03/2013 would have net book debts of \$14,500, not \$15,000.

2. If a provider's name is changed after the 'Cut off' date neither report will reinstate the original provider name.

You can click on the column headers in the Aged Debtors report to sort by that column.

The report can be printed, graphed or exported to Excel using the icons at the top right of the window.

GST Report

The GST Report prints an itemised report of all invoiced items which attracted GST in a particular time period.

You can create your own QuickReport template for this. See the [QuickReports](#) chapter for instructions on how to create a GST Report.

Referrals Report

This report will give a breakdown of the number of referrals from each referring doctor in the time period selected.

Alt+click on this button to get a Referral Value Report, detailing the monetary value of referrals from each referring doctor.

Shift+click on this button to get a Referral Source Report. This report will show those patients who have a referral source recorded in their demographics window and who have been invoiced in the selected time period. While a patient will only be counted in the 'Patient' column once (even if the patient has had multiple visits in the given timeframe), the total fees will reflect the combined invoice total for that patient for the given period.

Please note: when restricting the Referral Value and Referral Source reports by Provider, the servicing provider on the items invoiced is used to gather the data.

The reports can be exported to Excel using the **green X** icon at the top of the window

Banking Summary

The Banking Summary records are created when a banking batch is sealed (see [Banking](#) for more information). This summary report details the totals for cash, cheques, EFTPOS etc.

Assistants Report

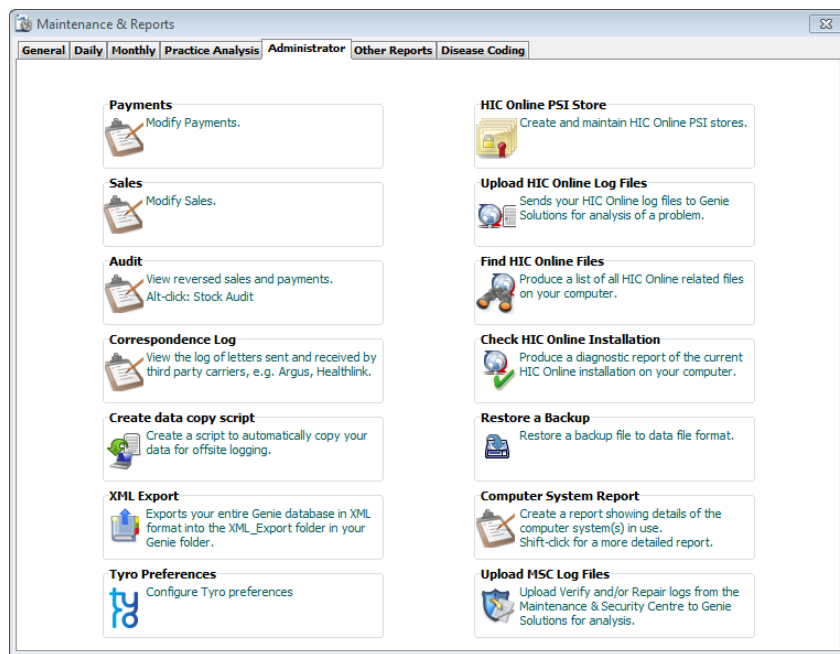
Allows you to either print or preview a report of Assistants' billing and receipts for each surgeon.

Note: This will only display 513XX assistant items. If you use your own custom item numbers you will need to either view the Item Report or use the Quick Report function.

Insurance Report

Displays all the billing for every patient of a specified fund. This report can be broken down by provider and/or item number.

7.1.5 The Administrator Page



Payments

Allows all receipts and credits to be viewed, searched or printed using a QuickReport. For more information on using QuickReports, see the [QuickReports](#) chapter.

Sales

Allows all billed items to be viewed, searched or printed using a QuickReport. For more information on using QuickReports, see the [QuickReports](#) chapter.

Audit

This allows the Administrator to view all billing changes that have been made to invoices/receipts including the reason entered by the user at the time of making the change. If the user does not enter a reason the change is still entered into the Audit but with a blank reason. The **Suspicious Entries** button will display those changes which could be suspicious.

For an explanation of what makes an entry suspicious, one of the practice principals should speak to someone at Genie Solutions.

Note: Only the Administrator of Genie, the user with the red tick next to their name in the log in window, can access the Audit report.

Correspondence Log

This function allows you to keep track of letters which have been sent and received from third party carriers (e.g. Healthlink & Argus). For more information on using third party carriers, please see [Electronic Correspondence \(Sending via 3rd party\)](#).

Create Data Copy Script

This creates a script that, when run, copies the data file from the server machine to the client machine for use with Offsite Logging (see [Offsite Logging](#) for more information), or for a take home Back Up (see the [BackUps](#) chapter for more information).

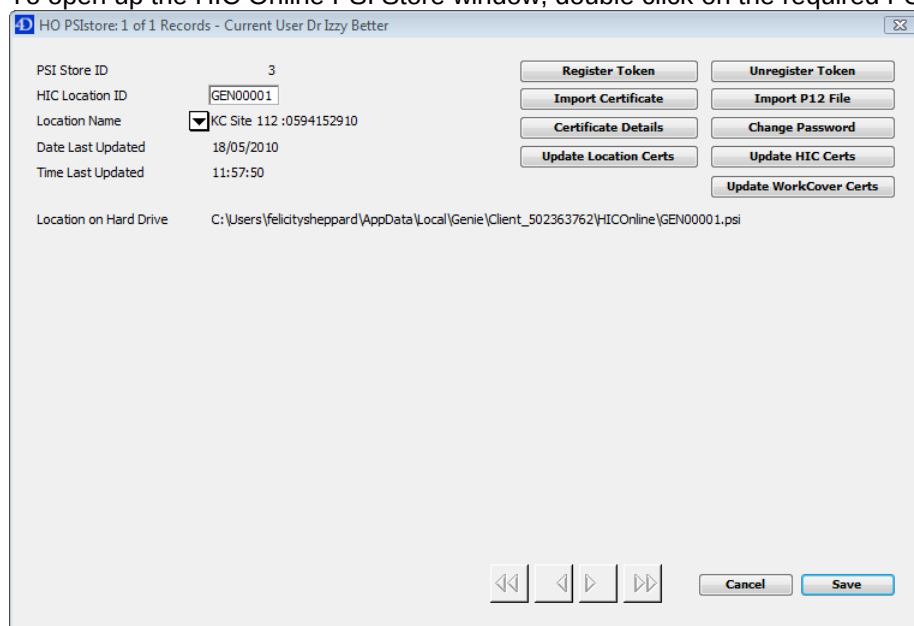
XML Export

Exports your entire Genie database in XML format to a XML_Export folder in your Genie folder.

HIC Online PSI Store

Allows you to create and maintain your HIC online PSI stores.

To open up the HIC Online PSI Store window, double click on the required PSI Store.



In here you are able to perform several tasks including:

- Update Location Certificates
- Update HIC Certificates
- Change Passwords

Most of the options in this window would only be used under the instruction of Genie Solutions support.

Upload HIC Online Log Files

This is usually only used under the instruction of Genie Solutions support as it sends your HIC Online log files to Genie Solutions for analysis of a problem. An internet connection is required for this upload to work, as you will be connecting to Genie's FTP site. If you are unable to upload your logs, it is typically due to either a Firewall blocking this connection, or that you are not connected to the Internet.

Find HIC Online related files on your computer

Produce a list of all HIC Online related files on your computer.

Check HIC Online Installation

Performs a self-diagnostic check of the HIC Online installation on the current machine. This should be useful in quickly diagnosing any HIC Online Installation problems.

Restore a Backup

Restores a backup file to data file format. For more information, read the chapter on [Backups](#).

Computer System Report

This utility displays information about the operating system, processor and RAM on the current workstation and the server. **Shift+clicking** will present you with a more detailed report.

Tyro Preferences

As of version 8.8.6, Genie is capable of integrating with the Tyro payment system.

Please note: The Tyro Preferences button will be accessible only to those users with the appropriate security preference enabled in File > Edit Groups.

In order to pair your Tyro terminal(s) with the computers in your practice, you will need to contact Tyro customer service.

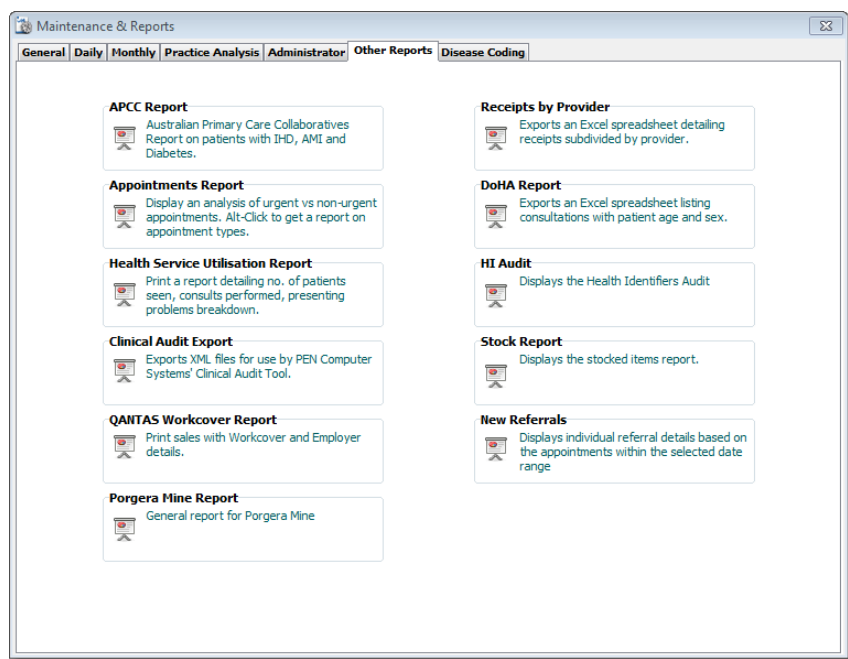
For existing Tyro users who wish to integrate their terminals with Genie, contact Tyro customer service by phone on 1300 966 639, or by email via cs@tyro.com

For users who wish to purchase Tyro for use with Genie, contact Tyro sales by phone on 02 8907 1717, or by email via health@tyro.com

Upload MSC Log Files

This button allows you to transmit any log files generated by data maintenance procedures - such as a verify - directly to Genie Support. For this most part, you will only use this button under the instruction of a Genie Support staff member or technician.

7.1.6 Other Reports Page



APCC Report

This is for doctors that are part of the Australian Primary Care Collaboratives incentive. It creates the reporting required on patients with IHD, AMI and Diabetes. All instructions on how to use the report accurately are contained within the report window.

Appointments Report

Displays an analysis of urgent vs non-urgent appointments.

Day	Average	Urgent	% Urgent
Sunday (0)			N/A
Monday (1)	3	3	100%
Tuesday (3)	14	5	38%
Wednesday (3)	2	1	60%
Thursday (2)	2	2	100%
Friday (2)	2	1	67%
Saturday (0)			N/A
TOTALS	57	28	49%

Note: Urgent appointments are classified as those that are booked in on the day (i.e. creation date = appointment date).

The number of days that a provider works in the specified period, is displayed in brackets beside the relevant day.

The *Average* column displays the average number of appointments on that day, over the specified period.

The *Urgent* column displays how many of those appointments are urgent, and therefore the percentage of urgent vs non-urgent appointments.

Appointment Types Report

Alt+clicking on the Appointments Report icon will generate a report on patient appointment types. This gives a count of patient appointments that have been classified using the Type menu in the Appointment Book for a given time period. For more information on Types see [Appointment Types](#) in the Appointments section.

Reason	Number
Unspecified	10
Changing Name	1
New Patient	4
Quick appointment	6
Record keeping	1
Tea Time	7
Total	29

Reason	Number
New Antenatal	33
New Patient	6
Quick appointment	42
Tea Time	1
Waiting for Cancellation	18
Total	100

Note: The Garbage can button will only be active in the Non Patient Appointments tab.

Health Service Utilisation Report

Provides a breakdown for University Health Services detailing the number of patients seen, consults performed and presenting problems, for the specified time period.
This report can be exported to Microsoft Excel if required.

Clinical Audit Export

Exports XML files for use by PEN Computer Systems' Clinical Audit Tool.

QANTAS Workcover Report

Designed for the QANTAS Workcover health centres. Prints sales with Workcover and Employer Details.

Porgera Mine Report

This is a general report for Porgera Mine in Papua New Guinea.

Receipts by Provider

Exports an Excel spreadsheet detailing receipts subdivided by *Provider*.

DoHA Report

Exports an Excel spreadsheet listing consultations with patient age and sex.

HI Audit

Displays a log of all HI-related actions performed in Genie.

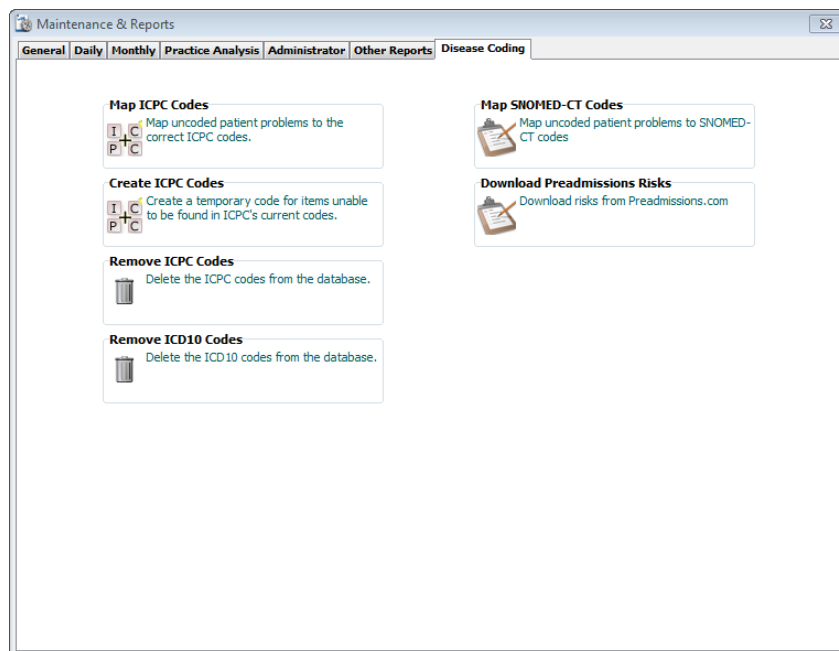
Stock Report

Generates a financial report of all stock purchased and sold over a specified period.

New Referrals

Shows a detailed report about individual referral details for appointments within a given date range.

7.1.7 The Disease Coding Page



If you wish to use either the ICPC or ICD10 coding systems, this section allows you to import and manage these systems.

The function to Map SNOMED-CT Codes is currently in development for implementation in a future release of Genie.

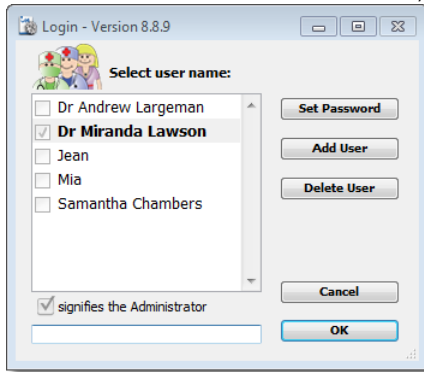
7.2 Security

This chapter covers password security, limitation of access to various parts of Genie, and the prevention of fraud by practice staff.

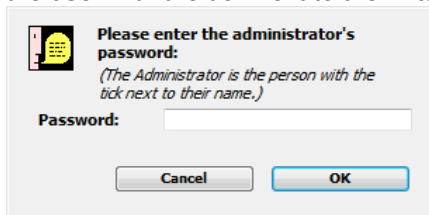
7.2.1 Add/Delete Users

Adding a User

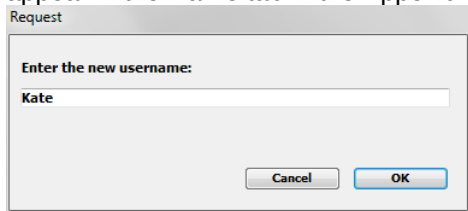
To add a new user to the database, click on the **Add User** button in the Login Window.



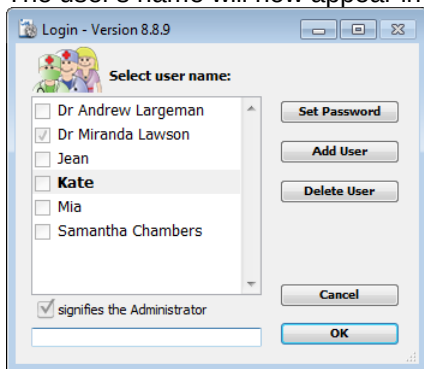
The window below will appear asking you to enter the Administrator's password. Remember: the Administrator is the user with the tick next to their name.



Click **OK**, and then enter a username for the new user, the format of this username is up to you. In a large multi-doctor practice, it is advisable to keep the username as short as possible, as this is the name which will also appear in the Name tab in the Appointment Book.



The user's name will now appear in the Login window.



When this user logs in for the first time, they will be prompted to set up their User Preferences. For more information on setting up User Preferences, see [User Preferences](#).

Marking Users as Inactive

Even if a user leaves the practice, we do not recommend deleting users from Genie outright. Doing so will cause all of their appointments, both past and future, to be deleted from the Genie database. This will also include any procedures associated with those appointments.

In order to retain information associated with a user after that user leaves, you should simply mark that user as *Inactive*. This will prevent that user from appearing in the login window, the appointment book, or any billing menus, whilst still keeping their data intact.

To mark a user as *Inactive*, open up their User Preferences window by navigating to **File > All User Preferences**, and double-clicking their name. Tick the *Inactive User* tickbox in the top-right of the window, and then click the **Save** button to close the window. The user will then no longer be visible in most areas of Genie. To make the user active again, simply untick the *Inactive User* tickbox.

Deleting a User

If absolutely necessary, you can also delete a user from the Login window by highlighting the user you would like to delete, and then clicking on the **Delete User** button.

Again, the Administrator must enter their password in order to delete a user.

7.2.2 User Access

The Administrator

The Administrator has the highest level of security. Only one user can be the Administrator. Typically this would be one of the principals, or a trusted practice manager.

Only the Administrator can perform the following functions:

- Assign someone else to be the Administrator.
- View the Audit Trail of modified invoices and receipts.
- Password-protect certain actions and preferences throughout Genie.
- Add and delete new users.

Other Privilege Levels

Security privileges for all users (including the Administrator) can be dictated via Edit Groups window (**File > Edit Groups**). See the [Edit Groups](#) section for more information.

Please note: If you are using version 8.5.6 of Genie or earlier, these security preferences can be found within the Security tab of each user's User Preferences (File > User Preferences**). For more information, please see the [User Preferences](#) section under Setting Up Genie.**

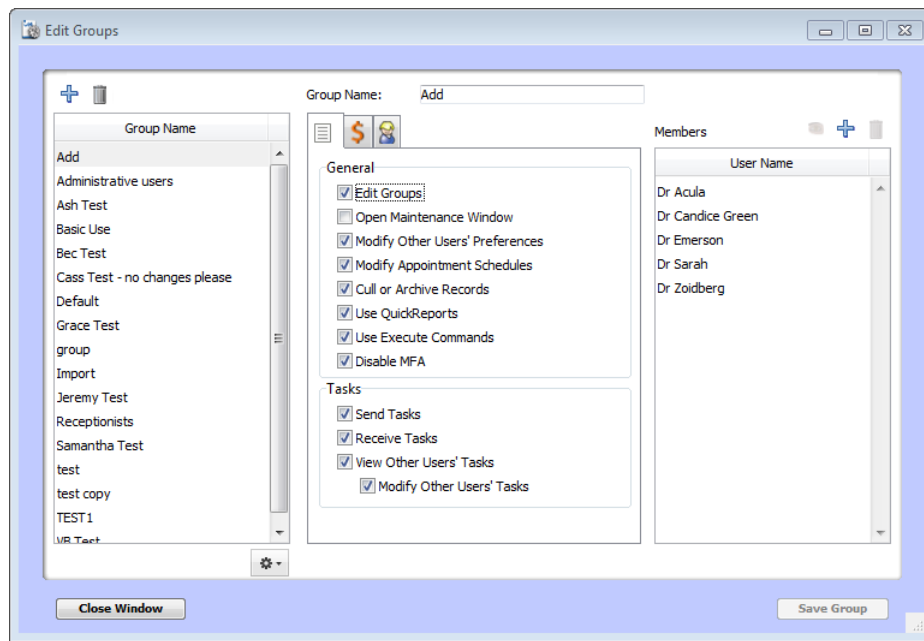
7.2.3 Edit Groups

The Edit Groups window allows you to set security privileges for different staff members, letting you define roles easily through Genie itself. If you are using version 8.5.6 or below, these privileges must be set in the Security tab of the user preferences. For more information, see the [Security tab](#) section of Setting Up Genie.

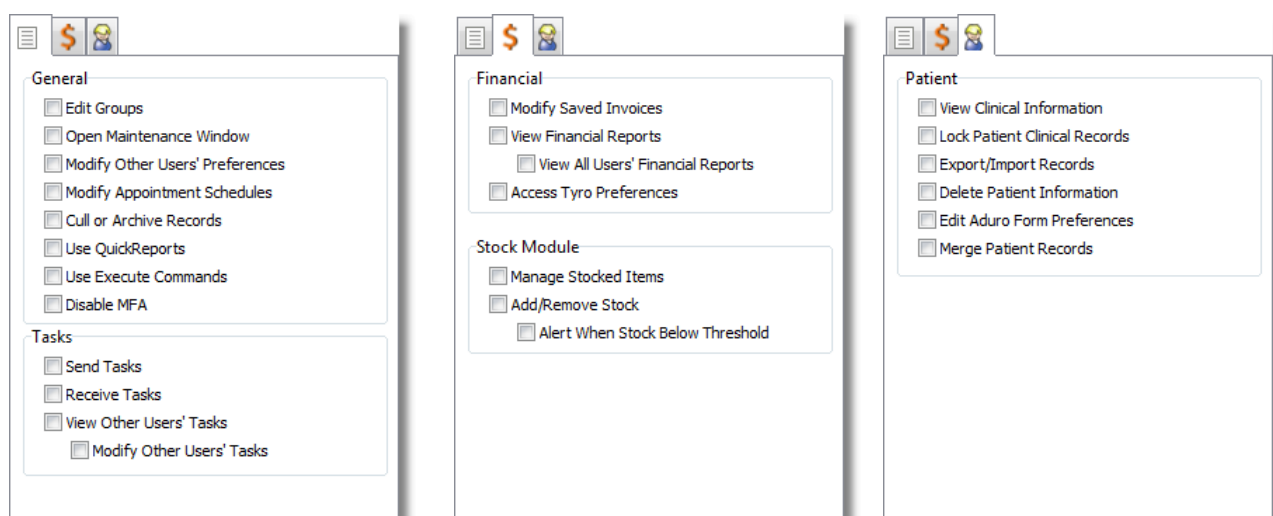
To configure and modify these security settings, navigate into **File > Edit Groups**.

Setting Up Groups

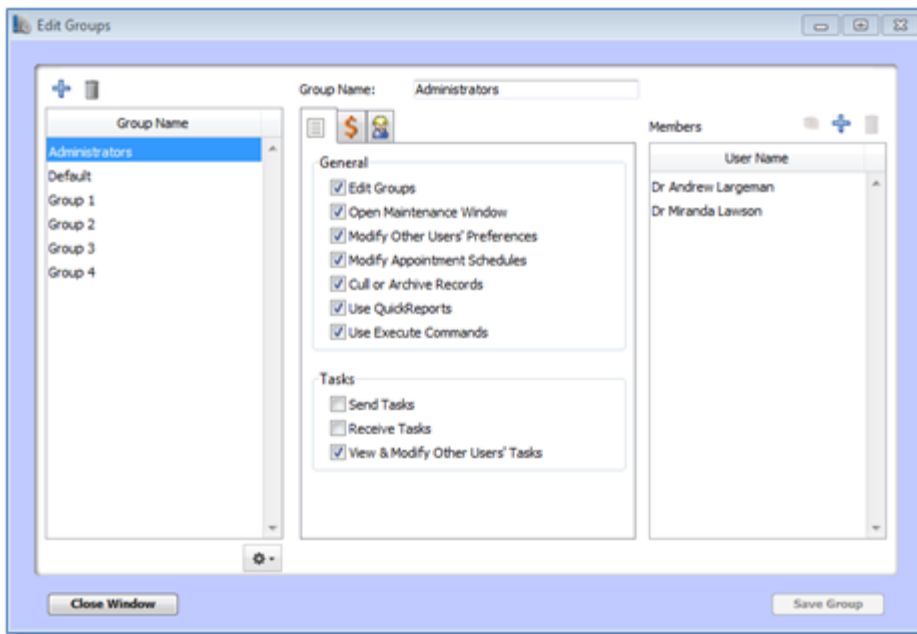
From installation, this window will contain a group called *Default*, which contains the minimum security settings. These will be the settings enabled for all users in the practice until they are added to a specific group.



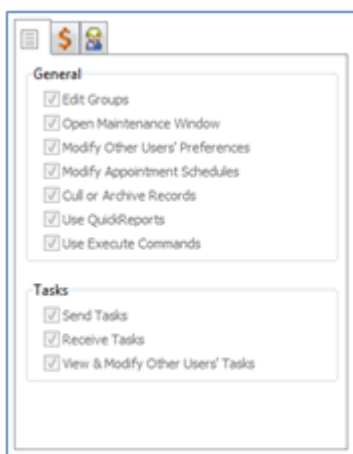
You can see users' permissions for different areas in Genie by clicking on the **General** , **Financial**  and **Patient**  tabs.



In addition to the *Administrators* and *Default* groups, you can add as many specific groups as you require. These groups give users additional privileges; each user has the *Default* group's privileges plus their own group's privileges. In this example, we can see the users in the *Administrators* group have ticks in almost all preferences.

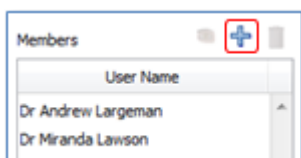


To view their combined permissions, click on the  icon. When you click on this icon, the Capabilities list will display their effective permissions. We can now see that Dr Largeman has full permissions in Genie.

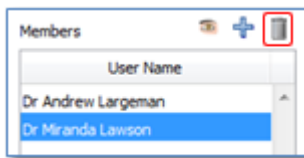


To return to the normal display, click on the **Effective permissions** button again. In this view, you can add or subtract any permissions from these users by ticking or unticking their respective boxes. To tick all checkboxes under a heading, **Alt+click** on the first item.

You can add any other users to this group by clicking on the **Blue plus** button at the top of the Members list.



You can remove any of these users by highlighting their name and clicking on the **Garbage bin** button.



After modifying the users and permissions for this group, you can rename the group if necessary. To rename the group, type into the *Group Name* field at the top of the window.

Save the changes you have made to the group by pressing **Save Group**.

Repeat these steps for each of the groups in your list.

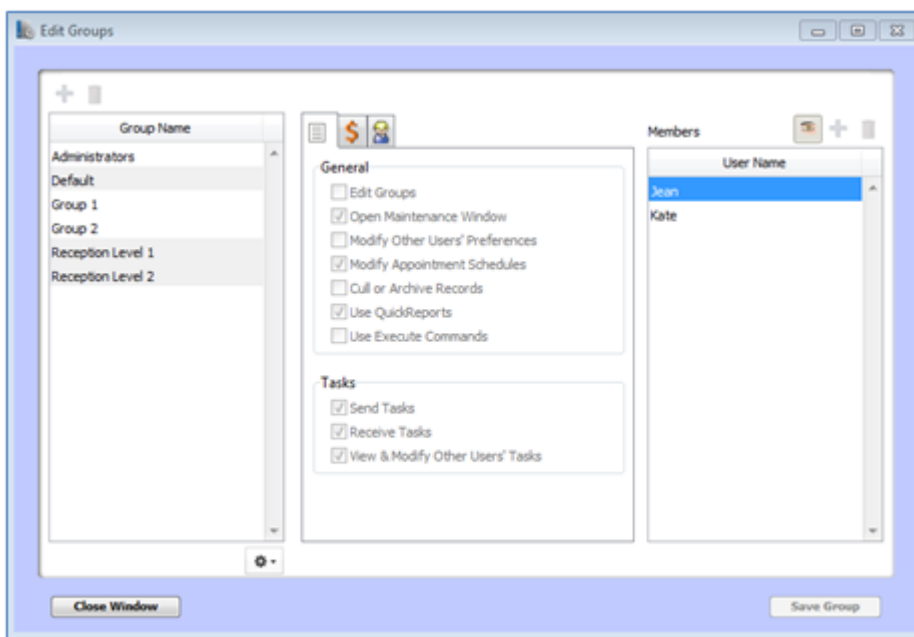
Tiered Grouping

Some roles in the practice may have permissions that are tiered depending on the user's position in the practice. By creating groups such as 'Reception Level 1' and 'Reception Level 2' you can accommodate these varying permissions.

To create a tiered system, follow these steps:

1. Create (or rename) a group called 'Reception Level 1', or equivalent.
2. Add all receptionists to this group.
3. Modify the preferences by ticking any permissions you would like these junior receptionists to have. There is no need to tick any of the default preferences.
4. Save the changes by clicking on **Save Group**.
5. Create (or rename) a group called 'Reception Level 2', or equivalent.
6. Add only the receptionists you would like to have these additional permissions.
7. Modify the preferences by ticking the additional permissions you would like these senior receptionists to have. There is no need to tick any of the default or 'Reception Level 1' permissions.
8. Save the changes by clicking on **Save Group**.

As the senior receptionists belong to both Reception Level 1 and Reception Level 2, their effective permissions will include all of these permissions plus the Default permissions.



The group memberships that are dictating these permissions are highlighted in grey in the *Group Name* list.

Troubleshooting

'I have allowed one of my groups minimal permissions but they are still able to do x, why is this?'

Check your Default permissions, you may find that you have accidentally ticked this permission for the Default group. To rectify this, untick this permission and press **Save Group**.

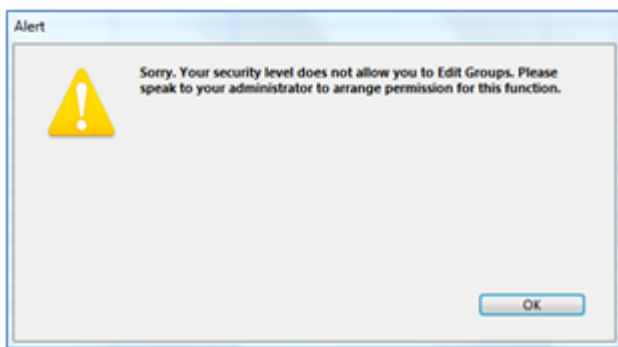
If you don't find this permission in your Default group, this user must belong to another group with this permission. To view all groups this user belongs to, highlight them and click on the **Effective Permissions** button. This will highlight all of their groups in grey. Inspect each group they belong to and make the decision to either (a) remove them from the group or (b) alter this group's permissions.

'I would like one of my users to have their own permissions, I don't want them to be part of a group.'

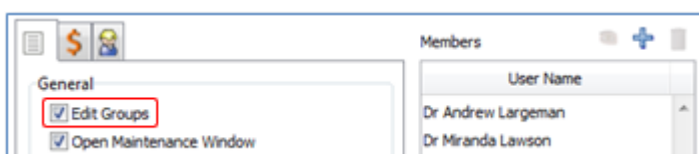
Every user must be a part of a group. If you would like them to have permissions that are unique to them, they will need to have their own group.

'I am trying to access x and I am getting an error message stating I don't have access, why is this?'

This message means that the user is not a member of the group(s) that can access this function.



The error message will state that the user should contact the administrator of Genie for assistance with this. If the administrator is unavailable, it is possible to contact any of the users with the *Edit Groups* permission ticked for one of their groups.



In the example above, both Andrew Largeman and Miranda Lawson would be able to alter these settings.

7.2.4 Passwords

It is strongly recommended that every user have their own password, preferably known only to them, and perhaps the Administrator. This is to ensure that in a large practice with several reception staff, nobody else can change invoices and receipts under another name.

Note: It is especially important for the Administrator to have a password and change it regularly. The Administrator will presumably be either an owner of the practice or a trusted receptionist or practice manager.

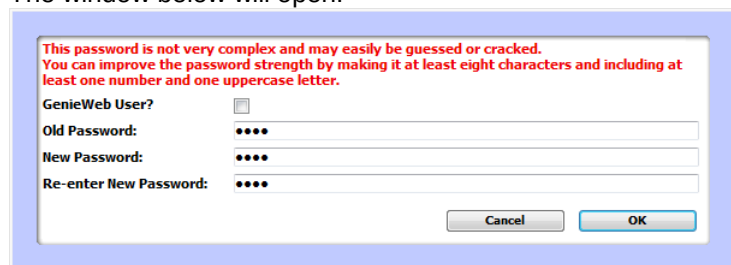
When choosing your password, make sure it isn't something obvious like "password", your name, a family member, or your dog's name. Ideally, it should be a random mixture of letters and numbers, or else an easily remembered word with suitable letters replaced by numbers e.g. "genie" becomes "g3n13". You should also change your password regularly.

Passwords can be created or modified in the Login window. You can do this either at the time of login or by selecting **File > Add or Change User**.

In the Login window, highlight your name, and then click on the **Set Password** button.

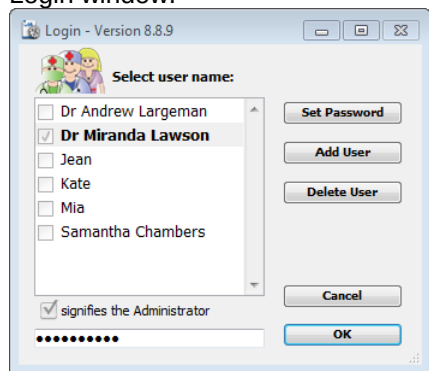


The window below will open.



If you are creating a password for the first time, leave the first field blank, otherwise enter your current password in the *Old Password* field. Enter your new password in the *New Password* and *Re-enter New Password* fields. Click **OK**.

Now, whenever you login you must highlight your name and then enter the password in the bottom field of the Login window.



As of Genie version 8.8.7, there are compulsory password complexity requirements for GenieWeb users. While

these are only compulsory for GenieWeb users, we strongly encourage that all Genie passwords adhere to these standards to ensure that all user accounts are secure. The requirements state that passwords must:

- Be at least eight characters in length.
- Contain at least one upper-case letter.
- Contain at least one number.

When modifying or adding a password in version 8.8.7 or above, Genie will prompt you to ensure that your password meets the above requirements.

Forgotten your Password?

The licensee of the practice must contact Genie Support by phone to reset the password of a staff member. This is a non-negotiable security policy.

7.3 Updates

There are multiple ways of updating Genie to the latest version. The method you use to update will depend on your current Genie version and the version to which you are updating.

As a general rule, here are the methods you will need for the possible update circumstances:

Type of update	What this means	How to update
Minor	A minor update is one where only the last number of the Genie version is different. For example, updating from version 8.8. <u>2</u> to version 8.8. <u>7</u> .	Either of the methods outlined in the following sections - 'Special Menu' Update or Manual Web Update .
Moderate	A moderate update is one where the middle number of the Genie version changes. For example, updating from version 8. <u>7</u> .2 to version 8. <u>8</u> .7.	Manual Web Update only
Major	A major update where the first number of the Genie version changes. For example, updating from version <u>7</u> .8.6 to version <u>9</u> .0.6.	As this is a major update that requires a data conversion (among other steps), this update must only be performed after reading the full instructions and requirements available on the Genie Upgrade page of the Genie website. If you have any questions about the conversion and update process, please contact Genie support.

If you aren't sure which update method to use, feel free to contact our support team via phone (1300 889 362) or email (support@geniesolutions.com.au) and we will be happy to assist you.

Prerequisites

There are four main prerequisites that **must** be met before performing an update of any kind:

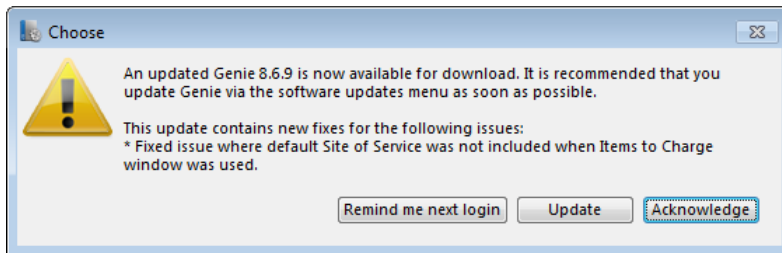
1. All users must be logged out of Genie. As part of the update process, the Genie Server application will close and restart, preventing user access until this has completed. Given this, it is good practice to run updates outside of business hours to minimise disruption.
2. A backup of the Genie data must be taken. Verify that you can restore the backup if need be.
3. Any offsite logs generated on offsite laptops must be imported beforehand. Any outstanding logs will be incompatible with the updated data, and the information will need to be manually re-entered if this is not done.
4. The all computers must meet the current Genie hardware and operating system requirements, as outlined in the [Genie Hardware Specifications](#) PDF guide. If using the paper version of this manual, you can access this guide within Genie via **Special > Software Updates > PDFs**.

Do not carry out any updates until the above prerequisites have been met.

Important update notifications

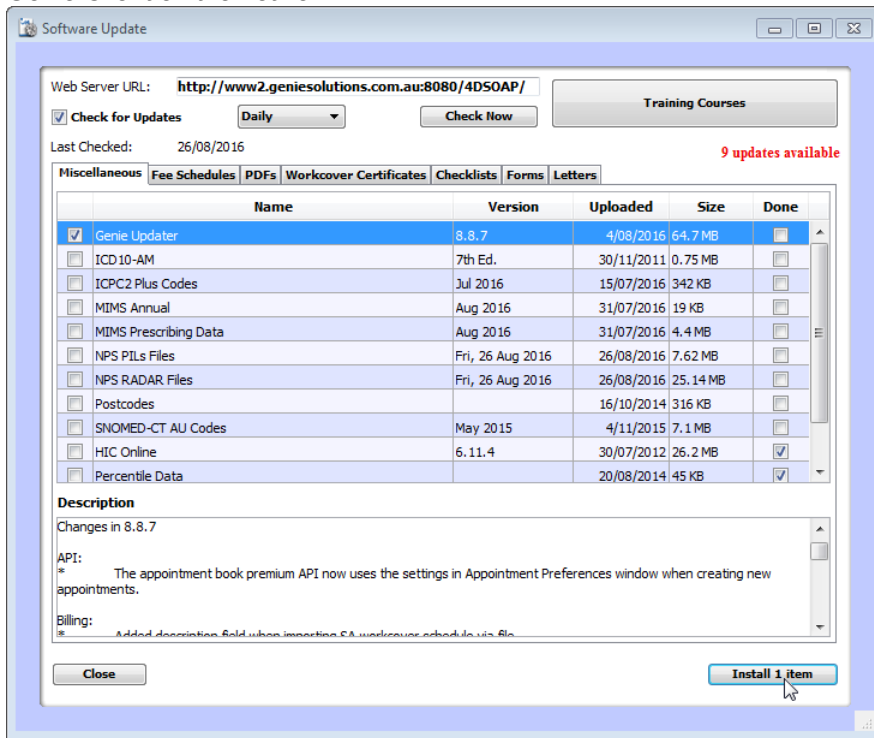
In the event that an important update is available or required for your current version of Genie - i.e. to rectify a bug or other issue - Genie will produce an alert. This alert will appear upon login under these specific circumstances:

- The user is the Genie administrator.
- The alert has not already been acknowledged.
- The current Genie version date is older than the alert date.



7.3.1 Automated 'Special Menu' Update

An automated update can be performed through the Software Updates window, and can be done from any Genie Client on the network.



Note: Before proceeding, ensure that all prerequisites are met as outlined in the [Updates](#) section.

Once you have prepared for the update, it can be carried out by following these steps:

1. On the client machine, navigate to **Special > Software Updates**.
2. Tick the checkbox to the left of the *Genie Updater* download option.
3. Click the **Install 1 Item** button.
4. When prompted, click the **Apply Update** button.

After **Apply Update** is clicked, Genie will proceed with the update. As part of this process Genie will download the update and send it to the server. The Genie Server application will close automatically, allowing the update to run.

Once the update has completed, the Genie Server application will be launched again. When you can see that the Genie Server application has re-launched, users may log back in as normal through Genie Client.

If you would prefer to carry out the update on the server machine itself, you may carry out the above steps through Genie Single User (Genie Solo) on the server, instead of Genie Client. To do this, close the Genie Server application (**File > Quit**) and launch Genie Single User, then proceed with steps 1 - 4 as above.

When downloading the update, if the **Just Download It** button is clicked instead of **Apply Update**, the Genie updater file will be downloaded to the computer for later use. This updater can be used to update the server manually, as per the [Manual Web Update](#) section.

Finally, if any users in the practice use offsite logging, make sure that Genie Single User on their offsite laptop(s) is updated accordingly. See [Updating for Offsite Logging](#) for more information.

7.3.2 Manual Web Update

A manual web update is carried out by downloading a specific installer or updater file, and running this on the server computer.

Note: Before proceeding, ensure that all prerequisites are met as outlined in the [Updates](#) section.

To perform an update of this type, you will need to first download the appropriate updater. There are three ways to get the file you need:

- If you simply need the latest version of the Genie software, navigate to the [Downloads](#) page of the Genie website and download the appropriate installer for your server platform (i.e. Windows or Mac). Take note of your Genie version before downloading, as older versions may be incompatible with the listed updater.
- If you attempt an update via the Special Menu as per the previous instructions, the Software Updates window may direct you to a separate Genie webpage. This means that your older version of Genie requires a manual update; the updater can be downloaded from the page that opens.
- If you are currently using an older version, Genie may require a specific upgrade path to get to the latest version. In this case, a Genie support staff member may need to provide you with a direct link to the installer you need. If you aren't sure whether your intended update requires a specific upgrade path, feel free to contact our support team via phone (1300 889 362) or email (support@geniesolutions.com.au) and we will be happy to assist you.

Once you have the appropriate updater or installer file, ensure that the file is accessible from the server computer, either by downloading the file onto that computer, or by saving it in a shared location on the network that the server can access.

Then, carry out the update by following these steps:

1. Close the Genie Server application (**File > Quit**).
2. Double-click the downloaded updater file.
3. Follow the prompts in the updater to proceed with the update. If you have been provided with an installer, rather than an updater, you will be prompted to select the components to install; select the *Update currently installed application(s)* option.
4. Allow the updater to run to completion.
5. Open Genie Single User (Genie Solo) via the lamp icon with the black cord.
6. Log in as normal and click **Update**, if/when you are prompted.
7. Close Genie Single User (**File > Quit**).
8. Re-launch the Genie Server application.

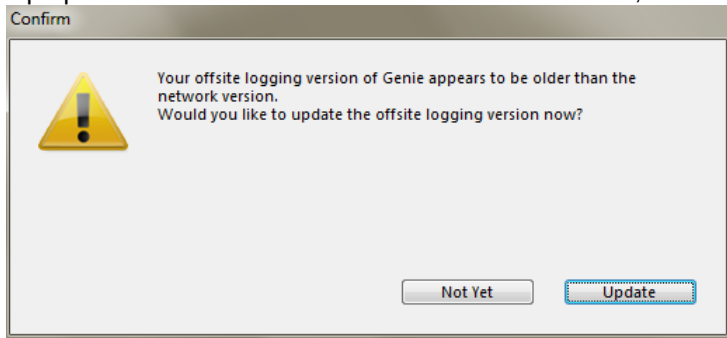
Once the Genie Server application is running again, the update is complete. If you have been provided instructions to perform a further update to get to the latest version, proceed with those to continue. Otherwise, users may now log back in via Genie Client as normal.

If any users in the practice use offsite logging, make sure that Genie Single User on their offsite laptop(s) is updated accordingly. See [Updating for Offsite Logging](#) for more information.

7.3.3 Updating for Offsite Logging

To continue using offsite logging following an update, the Genie Single User (Genie Solo) application on any offsite laptops must also be updated.

If the laptop is the same platform as the server computer (i.e. both computers are Windows, or both are Mac), connect the laptop to the network and log into Genie Single User. Genie will detect that the Genie version on the laptop is different to the Genie version on the network, and the user will receive the following prompt:



Click the **Update** button to update Genie Single User.

If the laptop is a different platform to the server computer (i.e. one is Windows, and the other is Mac), then you will need to update Genie Single User separately. How you update Genie Single User in this situation will depend on how you updated Genie on your network.

- If you performed the update through **Special > Software Updates**, you can update Genie Single User on the laptop in the same way. See the ['Special Menu' Update](#) section for more information.
- If you were required to perform a web update using a downloaded updater file, you will need to update Genie Single User on the laptop in the same way, by downloading the updater file appropriate for the laptop's platform. See the [Manual Web Update](#) section for more information.

7.4 Archiving

Over time, Genie's data file will grow in size as new records are added. In a busy, multi-doctor practice it can grow to a significant size. This is particularly so if you are downloading pathology results electronically, and/or writing many letters. Unlike scanned images, which are stored externally to your data file, pathology and letters are imported into your data file, thus adding to its size. There is no limit to the amount of data you can store but a compact data file will always perform better and make routine maintenance and emergency jobs like compacting or recovering a damaged data file less time consuming.

Before Archiving

There are a couple of things to do before performing an archive:

1. Before archiving any results or letters, it is recommended that you perform a backup as outlined in the [Backup](#) section.
2. Make sure you have enough room on your hard drive to hold the archived data. As a guide, ensure you have at least the size of your data file available as free space on your hard drive.

Performing the Archive Routines

Genie provides the ability to archive both downloaded pathology results and patient correspondence. These routines are performed in the Maintenance & Reports window (**File > Maintenance & Reports**).

Archiving can be performed on a client machine, or by using the single-user version of Genie on the server. There is no speed difference between the two. However, if you are archiving many records, the process may be quite lengthy. You won't be able to do anything else on this machine while the archiving is in progress, and the rest of the network will run slowly. For this reason, it is recommended that you perform the Archiving process at non-peak times only.

To perform an archive routine:

- To archive old letters, click on the **Archive Patient Correspondence** button. You will be prompted as to the cutoff limit in months. A search will then be made for old letters and you will be asked to confirm that you would like to archive them. Click the **Archive** button to proceed.
- To archive pathology results, click the **Archive Pathology Results** button. You will be prompted as to the cutoff limit in months. A search will then be made for old letters and you will be asked to confirm that you would like to archive them. Click the **Archive** button to proceed.

What Actually Happens

Genie loops through each record to be archived, and creates a folder in each patients images folder on the server called either "Archived Results" or "Archived Letters". Inside this folder, a file is created containing the actual archived data. For this reason it is **VERY IMPORTANT TO BACK UP YOUR IMAGES FOLDER!**

If you are archiving pathology results, a plain text file is created. The name of this file is made up of the unique ID number of the result and the name of the actual test. For example, if you are archiving a FBC result for John Smith, the pathway on the server would look something like this:

...Genie\Images\S\SmithJ1234\Archived Results\423-FBC.TXT

If you are archiving patient correspondence, the file containing the letter is created in Rich Text Format (RTF), so that the formatting of the letter is preserved, and so it can subsequently be opened by any word processor. The name of this file is made up of the unique ID number of the letter and the Title or Addressee. For example, the pathway would look something like this:

...Genie\Images\S\SmithJ1234\Archived Letters\789-Dr Peter Jackson.RTF

Note: The naming of these files is very important, because this is how Genie finds them to allow you to view them again. YOU MUST NOT CHANGE THE FILE NAME.

Viewing Archived Files

Once a file has been archived, it is still quickly and easily accessible from within Genie. The archive process doesn't delete the original record. It only extracts the data which is taking up the space.

The record is still in Genie with all the information about who ordered the result, the date, the test name etc. In the case of letters, it is only the body of the letter which is archived. Dates and Addressees are still present with the original record. If you wish to view a letter or result which has previously been archived, simply click on it in the Contact List of the patient's Clinical Window as you normally would. Genie recognises that the letter has been archived and asks the server to retrieve it. The whole process is totally transparent.

Note: When you open an archived letter or result, it becomes “de-archived”. That is, the content will stay within the data file until you next run the archiving procedure.

Compacting the Data File

After archiving results and/or letters, the data file does NOT automatically shrink in size, you will need to compact your data file to recover the space gained. Make sure everyone is logged off the network before continuing, as it requires Genie Server to be run in maintenance mode.

Accessing the Maintenance and Security Centre via Genie Server

1. Go to your server machine and open Genie Server.
2. Go into **Help > Maintenance & Security Centre**.

Accessing the Maintenance and Security Centre via Genie Solo

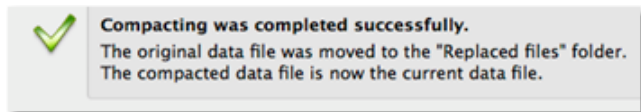
1. Go to your server machine and close Genie Server by going to **File > Quit** (Windows) or **Genie Server > Quit Genie Server** (Macintosh).
2. Enter '0' into the 'Disconnect From Server In' message and click on **OK**.
3. Open Genie Solo.
4. Go to **File > Maintenance and Reports > Maintenance & Security Centre**.

Compacting the Data

1. Click on the Compact tab to the left.
2. Select the Compact records and indexes icon.



3. You will be prompted that Genie Server will now run in maintenance mode. Accept this prompt.
4. If the process was successful, you will be presented with the following window:

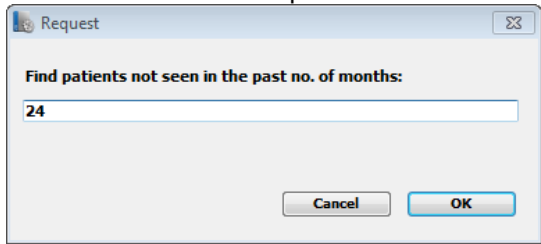


5. As indicated, the current data file will now be compacted and the previous data files will be located in **C:/Genie/Replaced Files** (Windows) or **Applications:Genie:Replaced Files** (Macintosh).
6. Close the Maintenance & Security window by going to **File > Quit** (Windows) or **Genie Server > Quit Genie Server** (Mac).
7. Reopen the Genie Server program as per usual.
8. If you receive any errors or red crosses alongside the Compact records and indexes button during the compacting process, please contact Genie Solutions for further assistance.

Archiving Patient Records

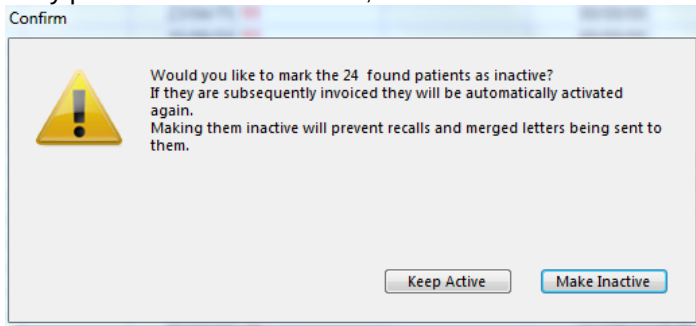
Archiving of patient records does not delete the patient records from the database but just marks them as inactive so they no longer come up in basic searches and on recall lists etc.

This is done through **Open > Patients, Patients > Find Inactive Patients**. This will then prompt you as to the cut off date of when the patient was last seen eg. patients not seen in the last 24 months.



This search is made using the *Last Seen* field. This field is given the value of the current date whenever the Clinical Window is opened and saved, or the patient is invoiced.

If any patient records are found, Genie will offer to mark them as *Inactive* in their demographic window.



Either way a list of the patients found in the search will be displayed allowing you to delete them if desired. It is not possible to delete patient records with attached consultation notes or any billing. Therefore, you can highlight them all by selecting **Edit > Select All**, and then click on the **Garbage Can** icon and Genie will only delete those patient records which have no billing or notes attached.

Note: Genie will NEVER delete the records automatically.

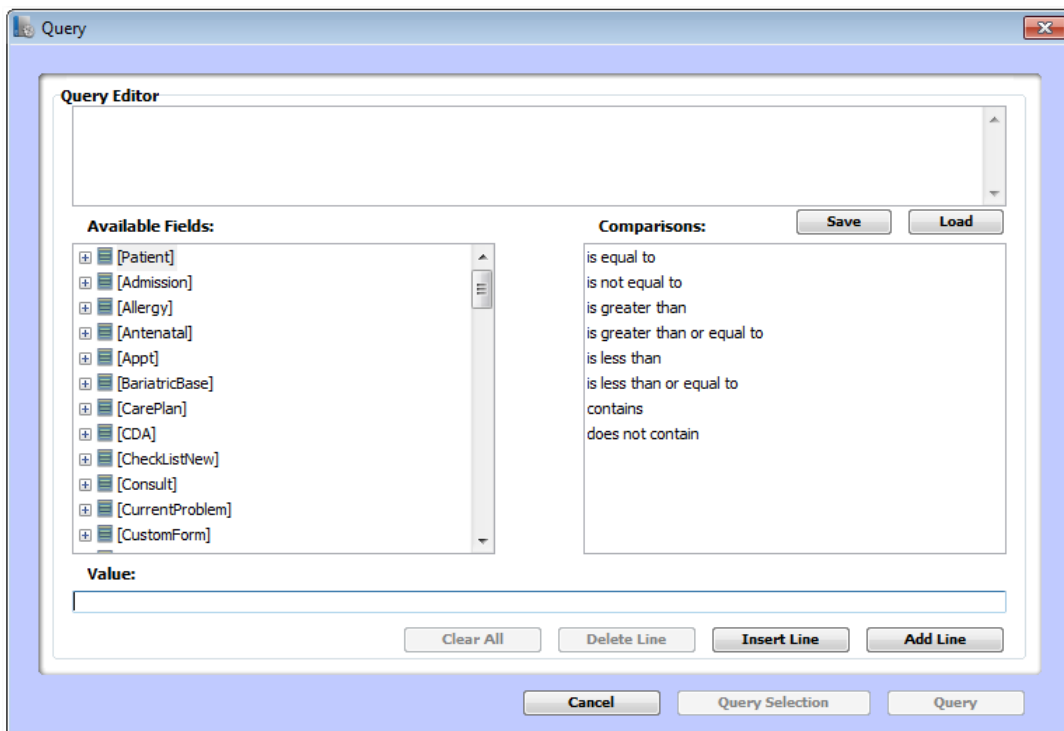
7.5 Queries & Searches

Genie allows you to make very precise and/or complex searches of your data. The following section outlines the use of Queries and Searches in Genie.

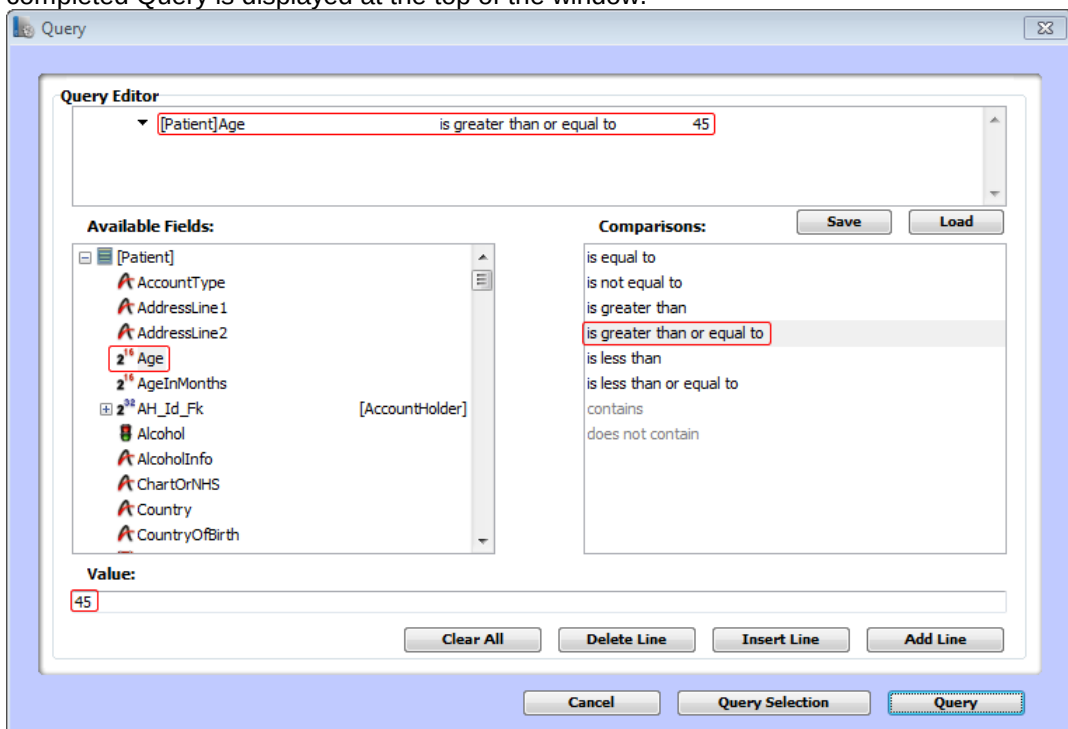
7.5.1 The Query Editor

A database is comprised of a series of tables; within each of these tables are fields. For example, the Patient table within the Genie database is comprised of fields from the Patient Demographics window, such as *DOB* and *Address* etc. The Query Editor is the window to your practice database and all of its tables and fields. Using the Query Editor, you can search a single table in the database or build complex searches across multiple tables.

The Query Editor is accessed by selecting **Records > Search** from whichever window you have open in Genie, allowing you to do a search on the relevant table.



It lists the fields in the active table in the left-hand list (in this example the [Patient] table is expanded), and a selection of comparisons in the right-hand list. The *Value* to search for is at the bottom of the window. The completed Query is displayed at the top of the window.



A Field, Comparison and Value must be selected/entered for the search to be valid (i.e. for **Query** button to become active).

Once a query has been built, there are two ways to perform the search:

1. **Query**
Clicking on **Query** will search through all the records in the table(s) you are querying.
2. **Query Selection**
Clicking on **Query Selection** will search through the currently displayed selection of records. This is useful if you would like to perform multiple queries to refine your search.

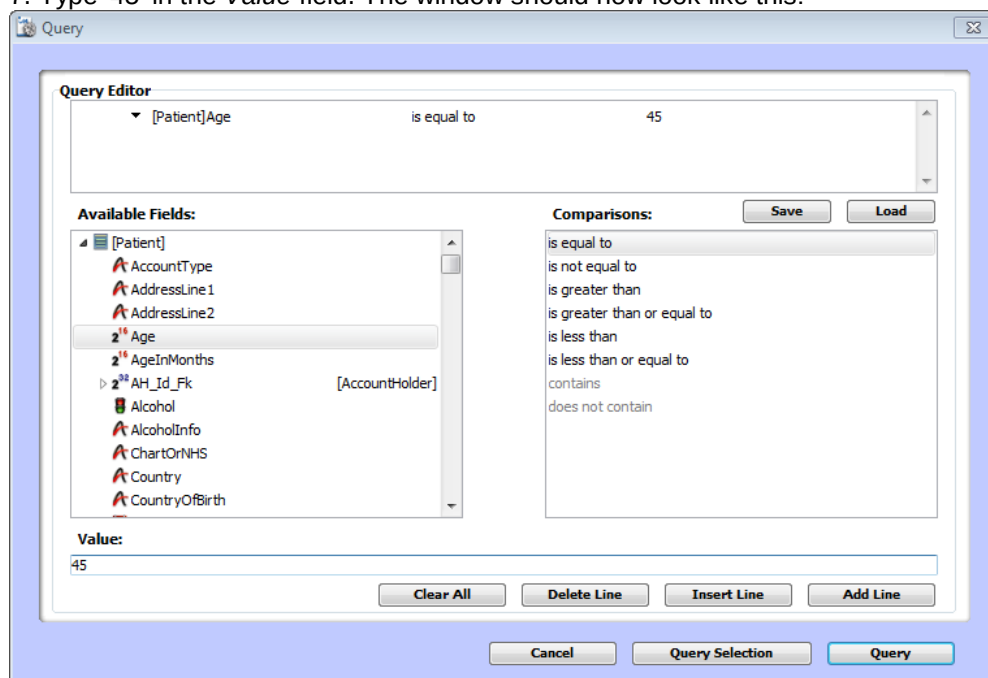
7.5.2 Simple Queries

The following examples highlight typical searches that are possible within one database table e.g. the *Patient* table. They do not necessarily reflect the sorts of searches you would perform but more the ways in which you can manipulate the Query Editor.

Note: Searches based on patient age can be skewed if the ages have not been recently updated through the Patients List. For more information on updating ages, please see [The Patients Menu](#).

Example 1: Find all patients aged 45.

1. Select **Open > Patients**.
2. Click **OK** to get rid of the Search window if it appears.
3. Select **Records > Search**.
4. Expand the [Patient] table by clicking on the little plus button .
5. Click on the *Age* field in the field list on the left.
6. Click on *is equal to* in the comparisons list on the right.
7. Type '45' in the *Value* field. The window should now look like this:



Note: The upper pane contains the finished query. If you are unsure whether you have entered the information correctly, you can read this to verify your current line and any previous lines, where applicable.

8. Click the **Query** button. (The **Query** button will remain disabled until you have entered a valid query.)

All the patients aged 45 will be displayed.

Example 2: Find all male patients aged between 45 and 50.

1. Select **Open > Patients**.
2. Click **OK** to get rid of the Search window if it appears.
3. Select **Records > Search**.
4. Expand the [Patient] table by clicking on the little plus button .
5. Click on the *Age* field in the field list on the left.
6. Click on *is greater than or equal to* in the comparisons list on the right.

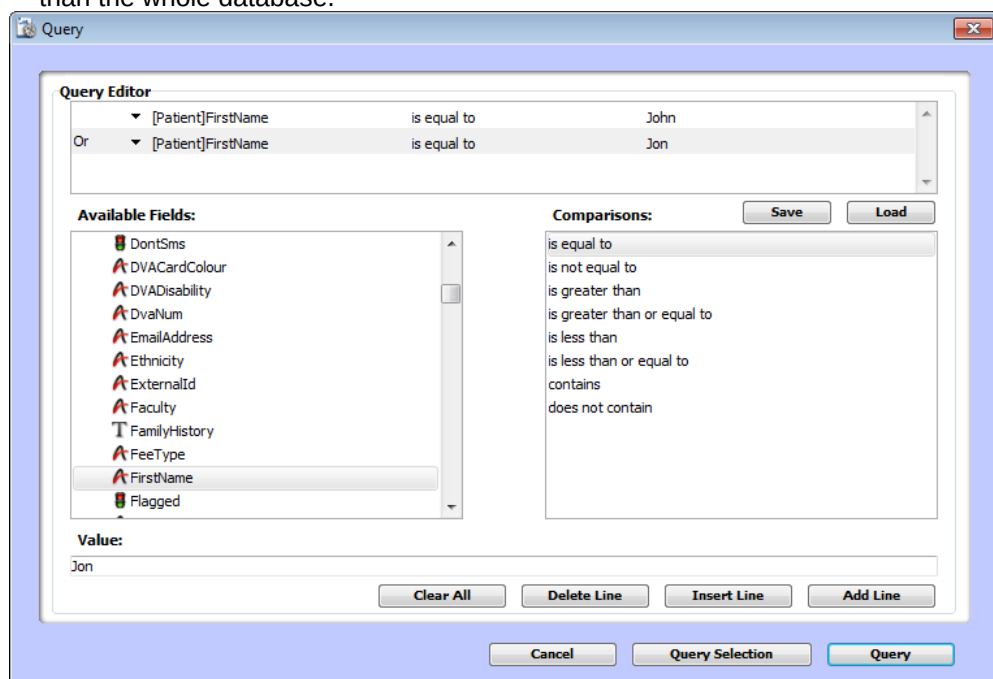
7. Type '45' in the *Value* field.
8. Click on the **Add Line** button.
9. Click on the *Age* field again in the field list on the left.
10. Click on *is less than or equal to* in the comparisons list on the right
11. Type '50' in the *Value* field.
12. Click on the **Add Line** button.
13. Click on the *Sex* field in the field list on the left.
14. Click on *is equal to* in the comparisons list on the right
15. Type 'M' in the *Value* field.
16. Click the **Query** button.

All males aged between 45 and 50 (inclusive) will be displayed.

Example 3: Find every patient aged between 45 and 50 whose first name is either 'John' or 'Jon'.

After performing the search in Example 2:

1. Select **Records > Search**.
2. Expand the [Patient] table by clicking on the little plus button .
3. Click on the *First Name* field in the field list on the left.
4. Click on *is equal to* in the comparisons list on the right
5. Type 'John' in the *Value* field.
6. Click on the **Add Line** button.
7. Click the drop-down to the left of the new line and select **Or**.
8. Click on the *First Name* field again in the field list on the left.
9. Click on *is equal to* in the comparisons list on the right
10. Type 'Jon' in the *Value* field.
11. Click the **Query Selection** button, which will search only the list of patients aged between 45 and 50 rather than the whole database.



Example 4: Find every patient whose first name is 'John' who lives on 'Main' Street.

1. Select **Open > Patients**.
2. Click **OK** to get rid of the Search window if it appears.
3. Select **Records > Search**.
4. Expand the [Patient] table by clicking on the little plus button .
5. Click on the *First Name* field in the field list on the left.
6. Click on *is equal to* in the comparisons list on the right
7. Type 'John' in the *Value* field.
8. Click on the **Add Line** button.
9. Click on the *Address Line 1* field in the field list on the left.
10. Click on *contains* in the comparisons list on the right

11. Type 'Main' in the *Value* field.
12. Click the **Query** button.

Example 5: Find every patient whose first name is 'John' who doesn't live on Main Street.

1. Select **Open > Patients**.
2. Click **OK** to get rid of the Search window if it appears.
3. Select **Records > Search**.
4. Expand the [Patient] table by clicking on the little plus button .
5. Click on the *First Name* field in the field list on the left.
6. Click on *is equal to* in the comparisons list on the right
7. Type 'John' in the *Value* field.
8. Click on the **Add Line** button.
9. Click the drop-down to the left of the new line and select **Except**.
10. Click on the *Address Line 1* field in the field list on the left.
11. Click on *contains* in the comparisons list on the right
12. Type 'Main' in the *Value* field.
13. Click the **Query** button.

7.5.3 Wild Card Searches

The wildcard character @ is used as a substitute for one or multiple other characters.

Note: The wildcard character can be used instead of the 'contains' comparison in the Query Editor.

Example 1: Find all patients whose surname begins with 'Smi'

1. Select **Open > Patients**.
2. Click **OK** to get rid of the Search window if it appears.
3. Select **Records > Search**.
4. Click on the *Surname* field in the field list on the left.
5. Click on '*is equal to*' in the comparisons list on the right
6. Type 'smi@' in the *Value* field.
7. Click the **Query** button.

This would find all the Smiths, Smithsons, Smileys etc

Example 2: Find all patients whose surname contains 'Smi'

1. Select **Open > Patients**.
2. Click **OK** to get rid of the Search window if it appears.
3. Select **Records > Search**.
4. Click on the *Surname* field in the field list on the left.
5. Click on '*is equal to*' in the comparisons list on the right
6. Type '@smi@' in the *Value* field.
7. Click the **Query** button.

This would find all the Smiths, Smithsons, Smileys etc as in the previous example, but would also find the Arrowsmith, Goldsmith and Cosmic families.

7.5.4 Searching Across Related Tables

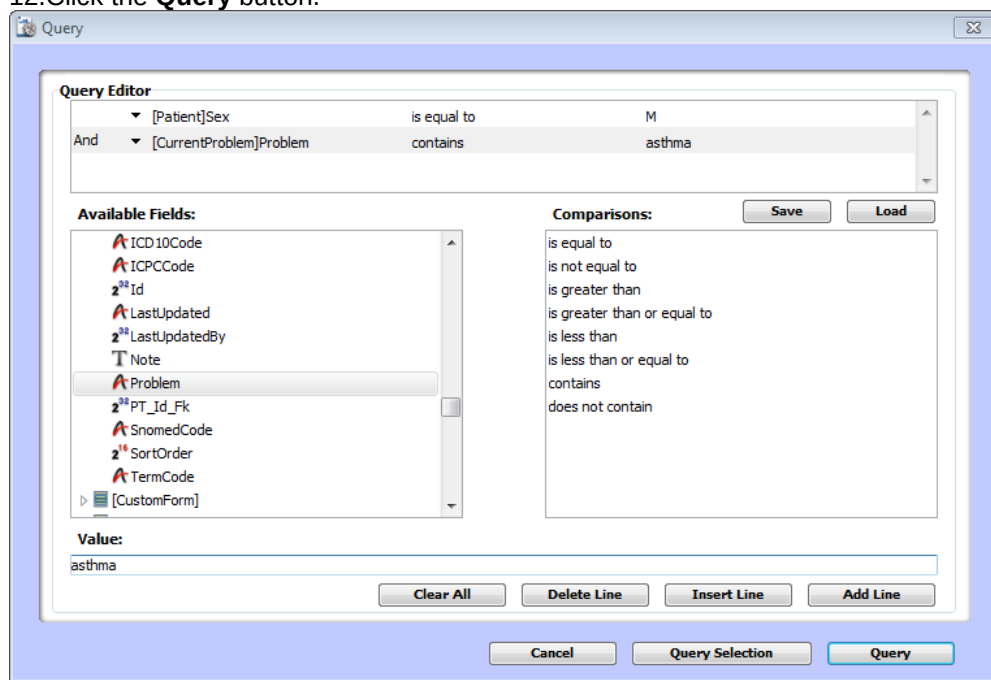
The following examples demonstrate how to create searches within Genie across related tables.

Example 1: Find all males who have asthma

1. Select **Open > Patients**.
2. Click **OK** to get rid of the Search window if it appears.
3. Select **Records > Search**.
4. Click on the Sex field in the field list on the left.
5. Click on '*is equal to*' in the comparisons list on the right
6. Type 'm' in the *Value* field.
7. Click on the **Add Line** button.
8. Click on the **triangle** or **plus (+)** to the left of the [Current Problems] table to expand it to show the fields in the Current Problems table.
9. Click on the *Problem* field.
10. Click on '*contains*' in the comparisons list on the right

11. Type 'asthma' in the *Value* field.

12. Click the **Query** button.



Note: This assumes that you have actually entered a Current Problem using the term 'asthma' in the patient's clinical entries. Using disease coding such as ICPC or ICD10 can get around this problem. For more information, read the chapter on [Disease Coding](#).

Other tables related to the patients table, meaning you can search across them in the same search, are:

- Admissions
- Allergies
- Appointments
- Care Plans
- Checklists
- Consultation Problems
- Current Problems
- Downloaded Results
- Health Assessments
- IVF Treatment Cycles
- Life Events
- Obstetric History
- Past History
- Patient Correspondence
- Pregnancies
- Prescriptions
- Procedures
- Recalls
- Script Archive
- Vaccinations
- Workcover Claims

7.5.5 Saving a Query for Reuse

If you have built a complex query, you can store it for future use by saving it to your computer.

To do this:

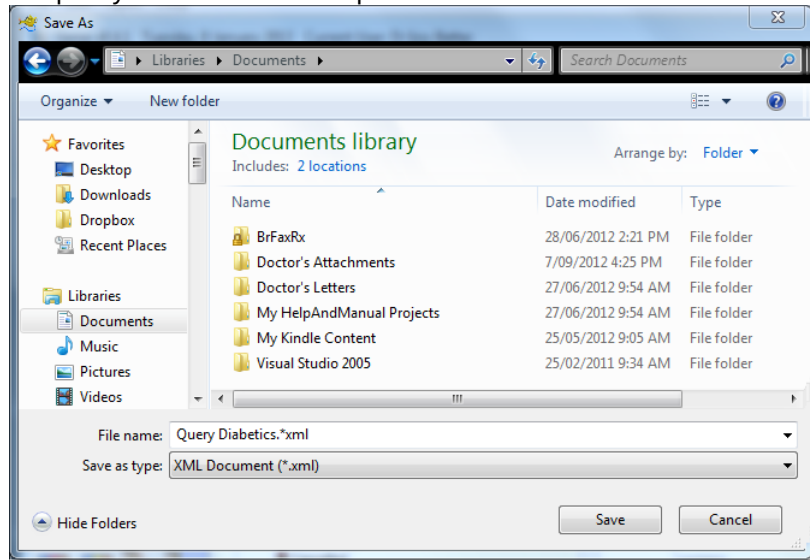
1. Build your query in the Query Editor window as outlined in the previous examples.

2. Click the **Save** button near the top of the Query Editor window



3. Save it somewhere you can easily retrieve it again later e.g. you might want to create a folder named 'Search Templates' inside the Genie folder and save all your search templates into here.

4. Specify a name for the template



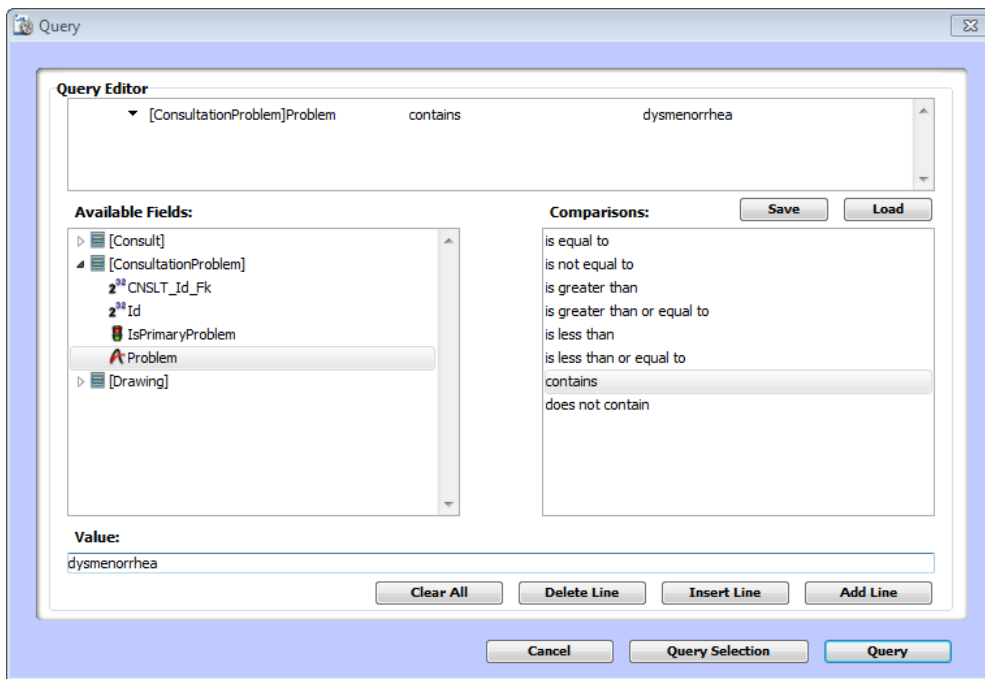
When you would like to use the same search again, click the **Load** button and open your previously saved template and then just click **Query**.

7.5.6 ICPC/ICD10, Consult & Prescription Searches

The **Open > Patients** window gives you access to some quick and easy search methods to search your clinical database.

If you have ICPC2-Plus or ICD10-AM codes installed, searches are easier, faster and more accurate. You can check which codes you use, if any by looking in **File > Practice Preferences**, double-clicking the clinic name, and selecting the **Miscellaneous** tab.

The **Search Consults** button  allows you to search your Presenting Problems, for example, how many patients have presented for 'dysmenorrhea' as shown below:



The **Search by medications** button  allows you to search your prescriptions on *Brand*, *Generic name*, *Class* and *Polypharmacy*. Example 2 below, shows how to use this.

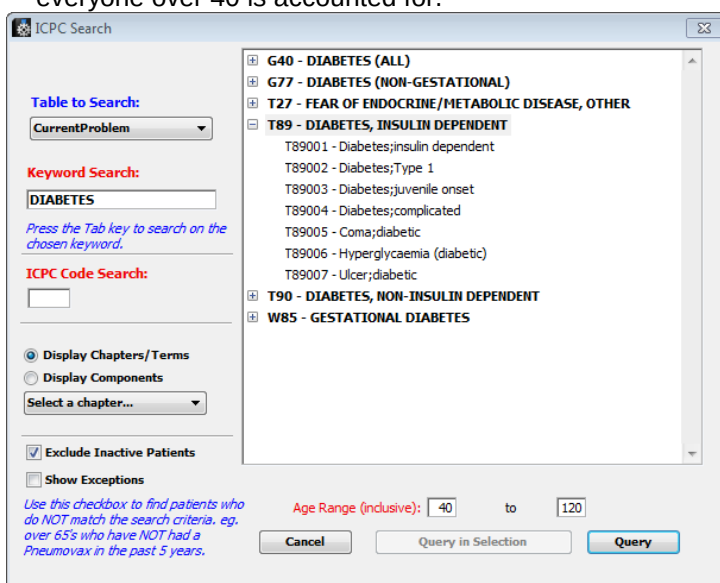
To perform an ICPC/ICD10 search, open the Patients List (**Open > Patients**) and click on the **ICPC Search**

button .

This will display the ICPC or ICD10 search screen, depending on which coding system you are using.

Example 1 - ICPC search: Patients over the age of 40 with Insulin Dependent Diabetes

1. Select the Current Problems table from the *Table to Search* drop down menu in the top left of the screen.
2. In the *Keyword Search* field, begin to enter 'diabetes'. You will notice that the word will auto-complete.
3. Press the **Tab** key on your keyboard. This will display all the relevant conditions and terms in a hierarchical list on the right, with major topics and subtopics.
4. In this case we are searching on the major topic of 'Diabetes, Insulin Dependent'.
5. In the *Age Range* fields, enter '40' for the bottom end of the range and '120' for the top end. This will ensure everyone over 40 is accounted for.



6. Clicking the **Query** button will search the entire database of patients.

The list of patients over the age of 40 who have insulin dependent diabetes will be displayed in a patient list.

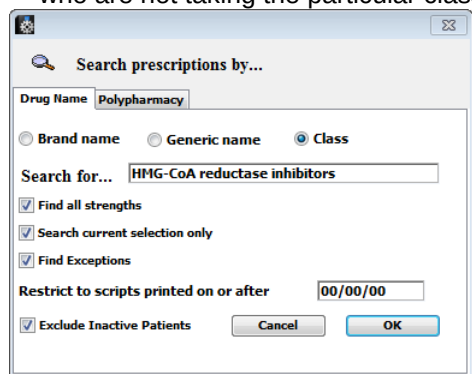
Note: Clicking the **Query in Selection** button will search amongst only those patients who are already displayed in the **Patients** list.

Note: Clicking the **Show Exceptions** checkbox will find patients over 40 who are not diabetics.

Example 2 - ICPC search extension: Find diabetics who are not taking an 'HMG-CoA reductase inhibitor.'

Following on from the last query:

1. Click on the **Rx Search**  button at the top of the Patients list.
2. Click on the **Class** radio button and enter the brand name of a drug in the particular class eg. Zocor.
3. Click **OK** and the class will now be entered in the *Search for* field.
4. Click the three checkboxes named *Find all Strengths*, *Search Current Selection Only*, and *Find Exceptions*.
This instructs Genie to search only amongst the patients already displayed, and to search for those patients who are not taking the particular class of drug. Your search window should look like this:

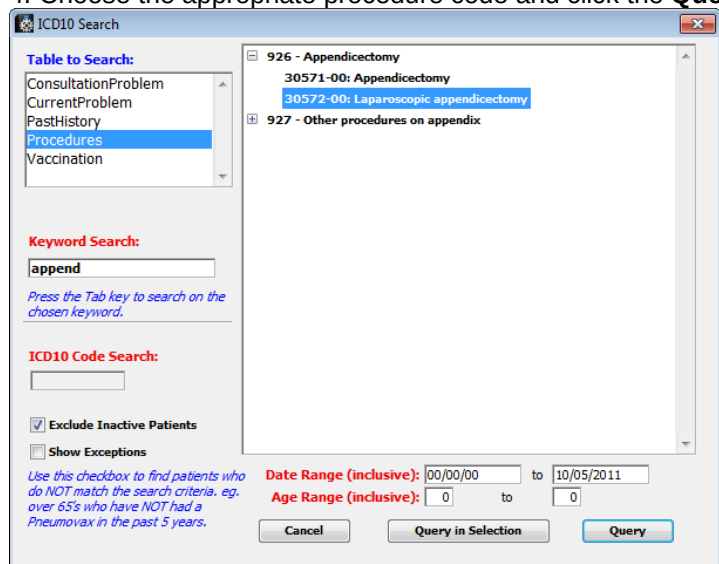


5. Click **OK**.

The list of patients from the last query will be refined to only include those patients not using HMG-CoA reductase inhibitor.

Example 3 - ICD10 search: Find all patients who have had an Appendicectomy.

1. Select Procedures from the Table to Search box
2. Type the 'append' in the Keyword search box or enter the item number into the ICD10 Code Search box.
3. Press **Tab** and the search results will be displayed on the right
4. Choose the appropriate procedure code and click the **Query** button to start the search.

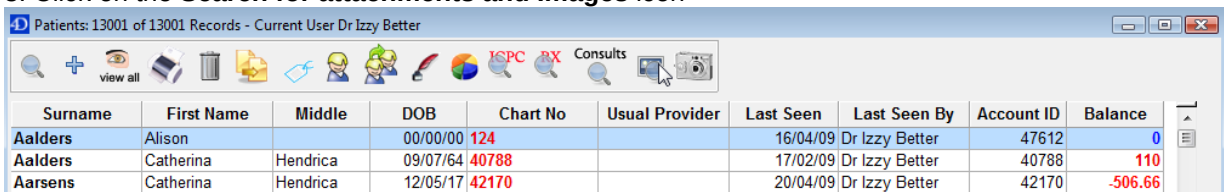


7.5.7 Searching Attachments/Images

Images can be searched using the **Search Attachments and Images** button  in **Open > Patients**. It is possible to search images added within a certain date range or images tagged with a particular keyword using the **Info** button in the Image Browser, as examples. The keyword search may be useful in a scenario where you wish to find all patients who have an image tagged with a keyword of 'melanoma', for example.

To do this:

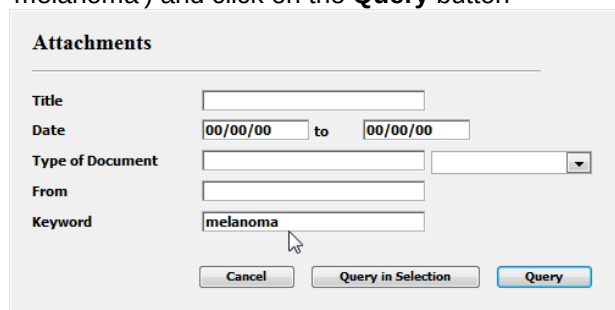
1. Go to **Open > Patients**
2. **Cancel** the search window if it appears
3. Click on the **Search for attachments and Images** icon



Patients: 13001 of 13001 Records - Current User Dr Izzy Better

Surname	First Name	Middle	DOB	Chart No	Usual Provider	Last Seen	Last Seen By	Account ID	Balance
Aalders	Alison		00/00/00	124		16/04/09	Dr Izzy Better	47612	0
Aalders	Catherina	Hendrica	09/07/64	40788		17/02/09	Dr Izzy Better	40788	110
Aarsens	Catherina	Hendrica	12/05/17	42170		20/04/09	Dr Izzy Better	42170	-506.66

4. In the 'Attachments' window that appears, type the relevant keyword into the 'keyword' field (for example, 'melanoma') and click on the **Query** button



Attachments

Title:

Date: to

Type of Document:

From:

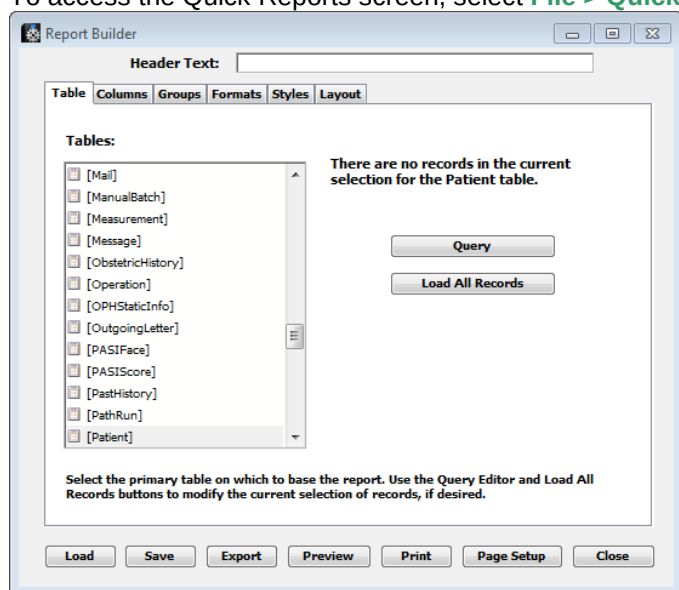
Keyword:

This will display all patients who have an image that has been tagged with that particular keyword.

7.6 Quick Reports

Quick Reports allow you to customise the display/printout of your complex searches in a variety of ways.

To access the Quick Reports screen, select **File > Quick Reports**. This will open the Report Builder window.



Report Builder

Header Text:

Table Columns Groups Formats Styles Layout

Tables:

- [Mail]
- [ManualBatch]
- [Measurement]
- [Message]
- [ObstetricHistory]
- [Operation]
- [OPHStaticInfo]
- [OutgoingLetter]
- [PASIFace]
- [PASIScore]
- [PastHistory]
- [PathRun]
- [Patient]

There are no records in the current selection for the Patient table.

Select the primary table on which to base the report. Use the Query Editor and Load All Records buttons to modify the current selection of records, if desired.

There are 6 tabs in the Report Builder that can be used to customise your report.

1. Table
2. Columns
3. Groups
4. Formats
5. Styles
6. Layout

The *Header Text* field allows you to specify a title that will appear on the top of the printed report.

Along the bottom of the Report Builder, are several buttons that are accessible from all tabs. Their functions are outlined below:

Load: Allows you to load a previously saved report.

Save: Saves a report for later use.

Export: Allows the data to be exported to various file formats. These are:

- ASCII Text
- EXCEL Spreadsheet
- HTML

Preview: Allows you to preview the report before printing.

Print: Prints the report.

Page Setup: Allows you to set your paper size and orientation.

7.6.1 Report Builder

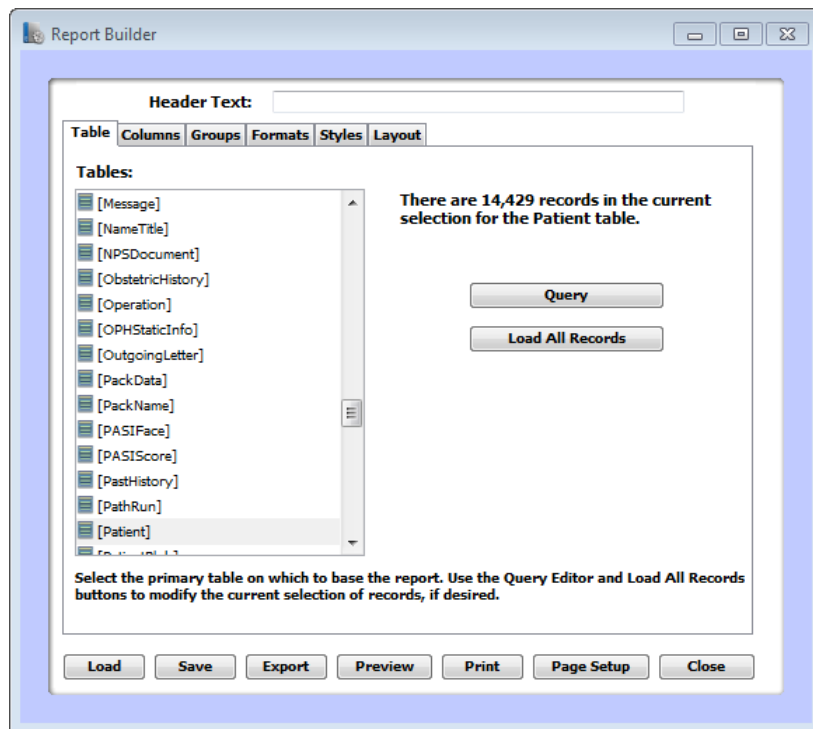
The easiest way to learn how to use the Report Builder is to run through a few examples.

Example 1: Print a list of all patients aged 65 and over

Firstly, you would need to perform the search to get the group of records/patients that you would like to include in your report. This is done through the **Table** tab in **File > Quick Reports**.

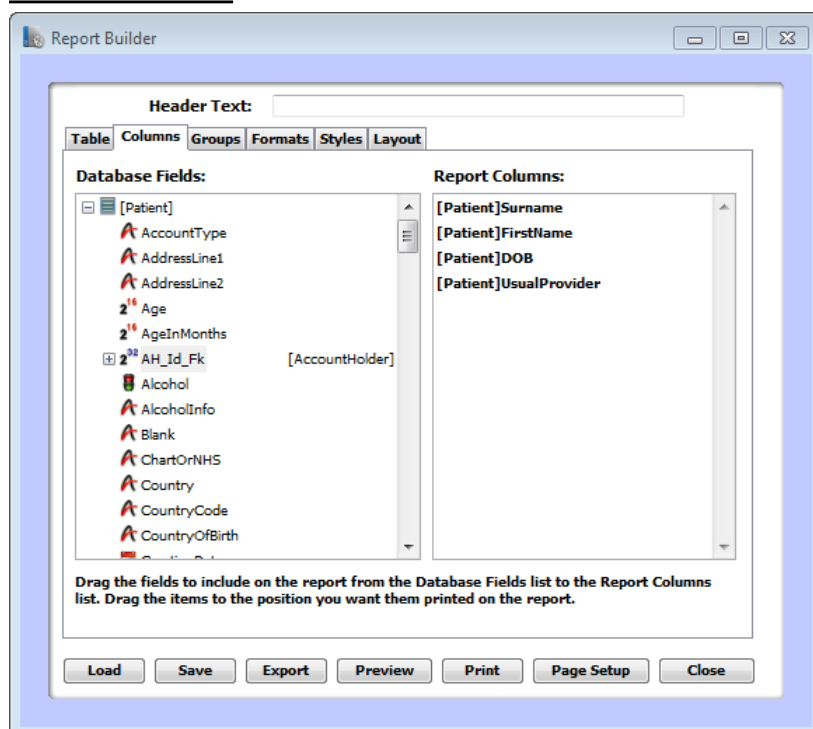
The Table Tab

The **Table** tab displays a list of all Tables in the database. This is where you select the primary table to be searched (e.g. [Patient]) and then perform your search using the **Query** button. If you wanted to print a list of all records in that table then just click **Load All Records** and then go on to the **Columns** tab to begin building your report. Some common tables you might search would be the [Consult] table for anything described in the consult window or [Procedure] for a report on the number of procedures performed etc.



In our example we would select the [Patient] table in the Tables tab, click the **Query** button and search for all patients aged 65 and over. For information on how to do this search refer to the [Queries and Searches](#) Chapter

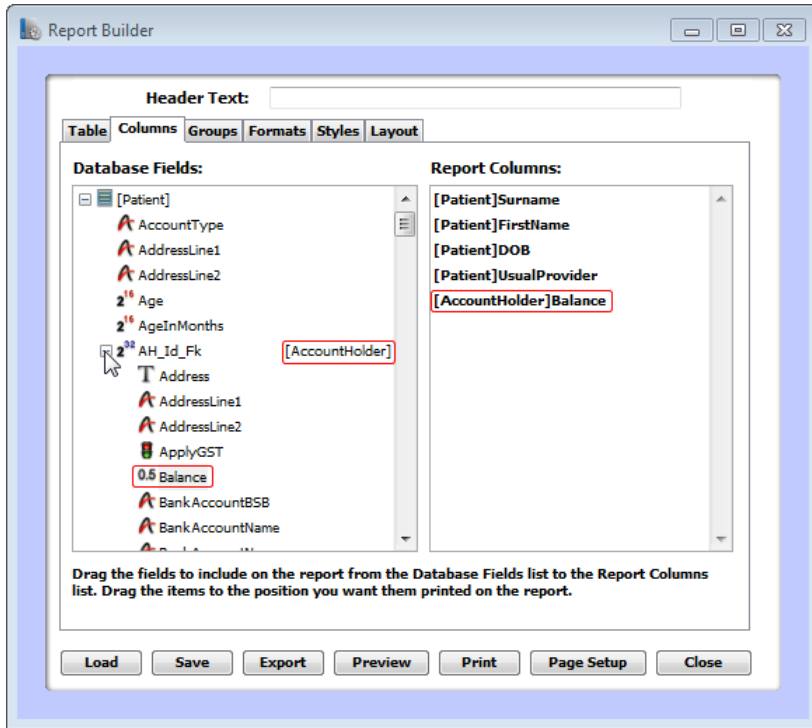
The Columns Tab



The **Columns** tab is where you select the columns that you would like included in the report.

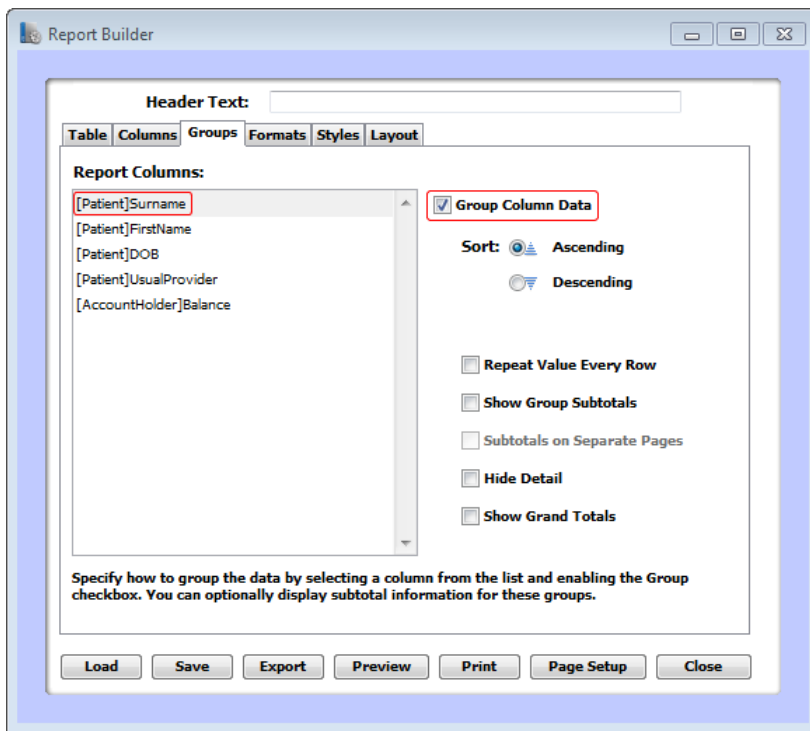
- To add a column, double-click on the field in the list on the left and it will be transferred to the list on the right. Alternatively, you can drag and drop a field from left to right.
- To remove a field from the Report Columns list, drag and drop it from right to left.
- To change the order of the columns, drag and drop the fields within the list on the right, the top field will be the first column and the bottom field will be the last.

You will find any associated/linked tables within the list, in this example, the *Patient* table is also related (linked) to the *AccountHolder* table, so we can also include fields from the *AccountHolder* table. To expand the *AccountHolder* table, click on the **Little plus** button . You can then drag in any *AccountHolder* fields you would like to include in the report. In the example below, we have dragged the Balance field from inside the *AccountHolder* table.



The Groups Tab

Grouping is similar to sorting. To have a report sorted by a column, either chronologically or alphabetically, select the column on the left then tick the *Group Column Data* checkbox. In this example we will sort the records alphabetically by Surname.



Note: You can sort in either **Ascending order (usual)** or **Descending order**.

The *Repeat Value Every Row* checkbox ensures that the value for every record is printed. ie. instead of:

Smith	Amy	Smith	Amy
	Bill	Smith	Bill
	Charles	Smith	Charles

The *Show Group Subtotals* checkbox would add the number (count, sum or other, depending on what is chosen in the *Formats* Tab) of each particular value to the report. i.e. it would tell you that there were 30 Smiths, 4 Smitheys and 1 Smitherton etc.

Note: Subtotals will only show for a column after a mechanism is chosen in the *Formats* tab (ie. **Sum, Average, Min, Max, Count**)

The *Subtotals on Separate Pages* creates a new page for each new value in the selected column.

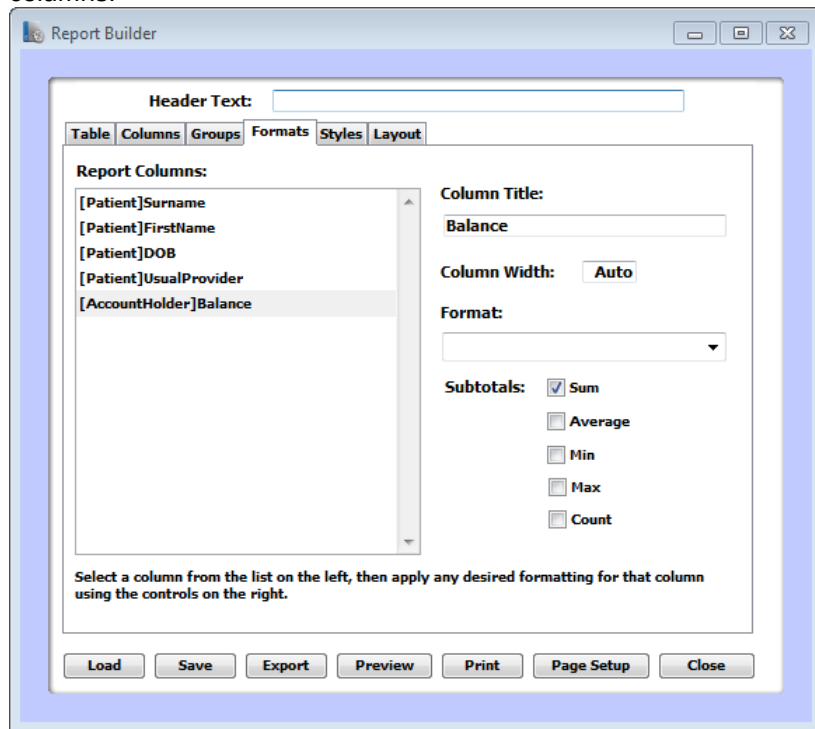
The *Hide Detail* checkbox hides the details of the report. e.g.

- Smith: 30
- Smithey: 4
- Smitherton: 1

The *Show Grand Totals* checkbox displays the grand total for the selected columns at the bottom of the report.

The Formats Tab

This window allows you to change the title of the column, as well as specifying formats for date and number columns.



The *Column Title* allows you to override the field name in the database to a column title more appropriate. For example, you may want to change *AddressLine1* to just *Address*.

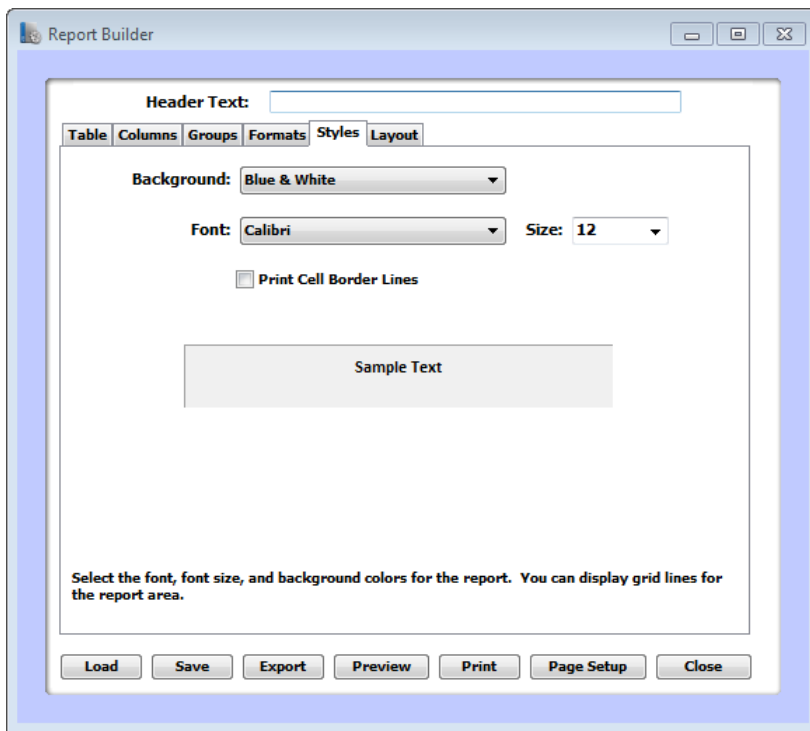
The *Column Width* allows you to specify the width of the column as it will appear on the report. The measurement is in Points. This varies between platforms and computer Display settings, but as a rough guide Macintosh has approximately 30 Points to a centimetre and Windows has approximately 40 points. This is important for large text fields like the History field in [Consult] as it will invariably go off the report page unless you specify a Column Width.

The **Format** tab allows you to format date and number fields by selecting the required format from the drop down menu.

Subtotals allows you to display the appropriate Subtotal for the column selected. Any numerical columns, like Balance, would usually need a Sum Subtotal. It is important to be sure you have *Show Group Subtotals* and/or *Show Grand Totals* ticked in the **Groups** tab so that the totals are displayed in the report.

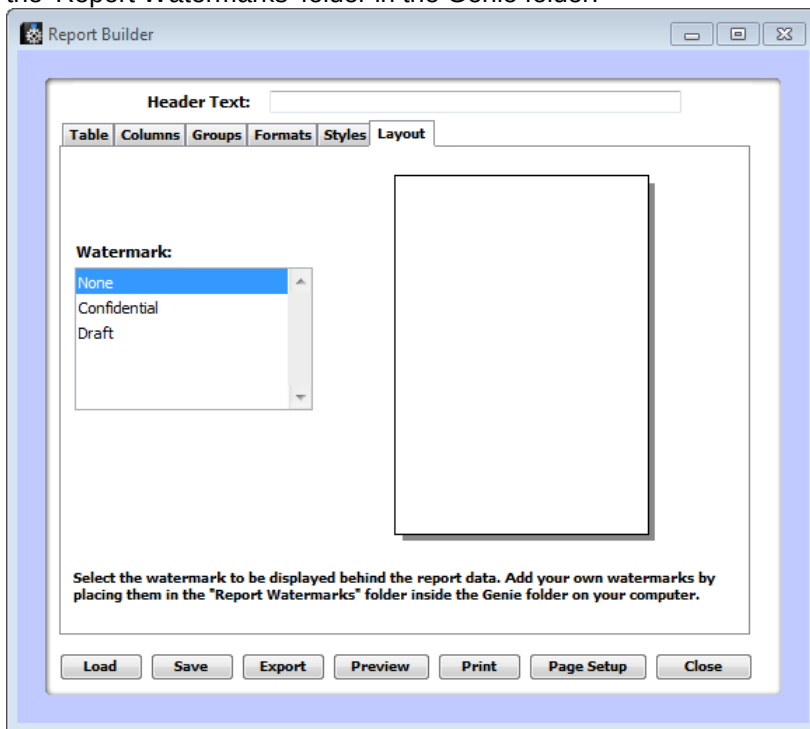
The Styles Tab

This window allows you to customise the appearance of the report, including font and font size, background colours and banding, and whether or not each particular field will be surrounded by a border (like an Excel spreadsheet).



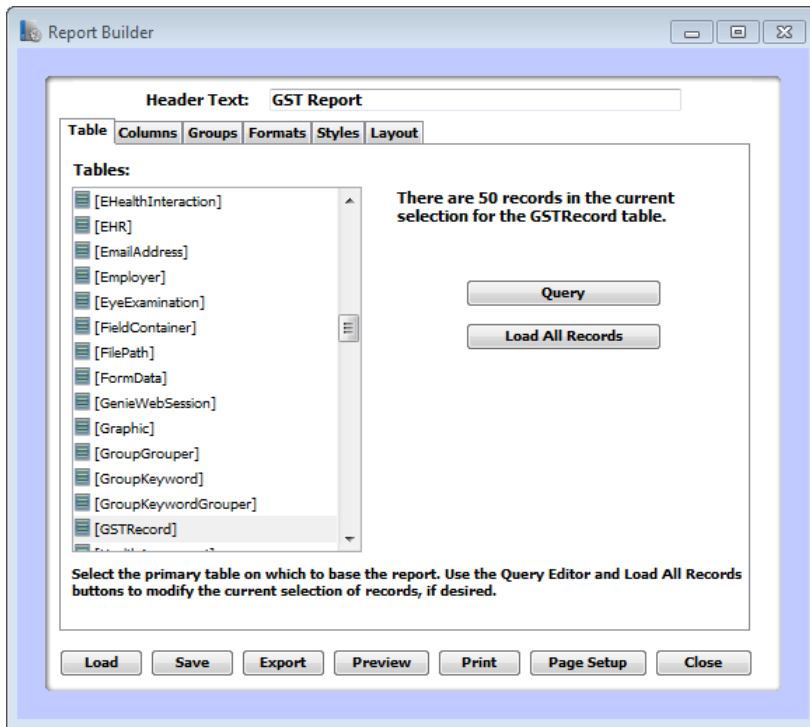
The Layout Window

In this window you can assign a watermark. You can add your own watermarks by placing a picture file inside the 'Report Watermarks' folder in the Genie folder.



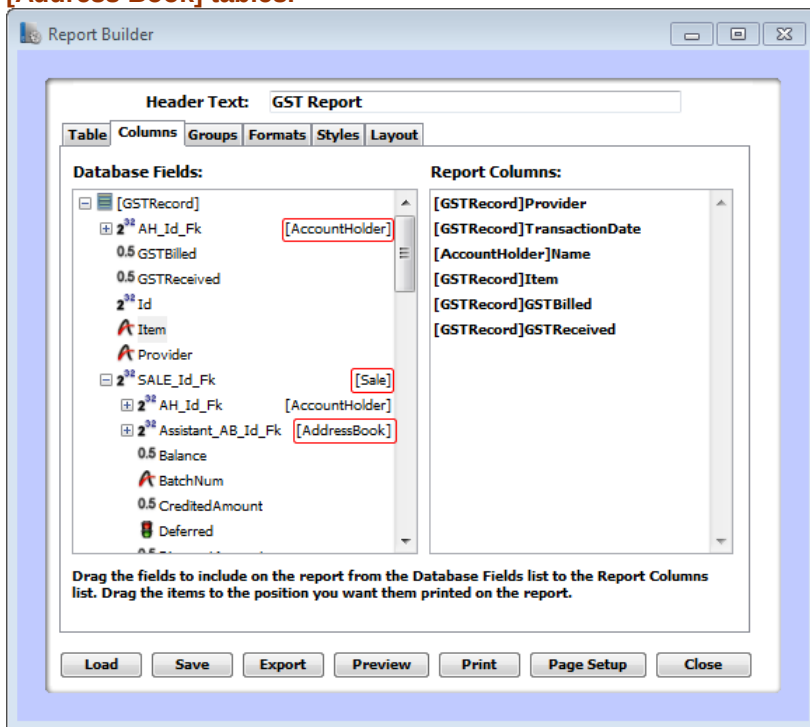
Example 2: Creating a GST Report

The GST Report in Maintenance and Reports also uses a QuickReport. When you click on the **GST Report** button, you will be prompted to select the date range, meaning you do not have to do your search for records. Then the Report Builder will open to the following window, with the [GSTRecord] table already selected. This report should already be setup according to the below specifications but it is a good financial example to work through nonetheless.

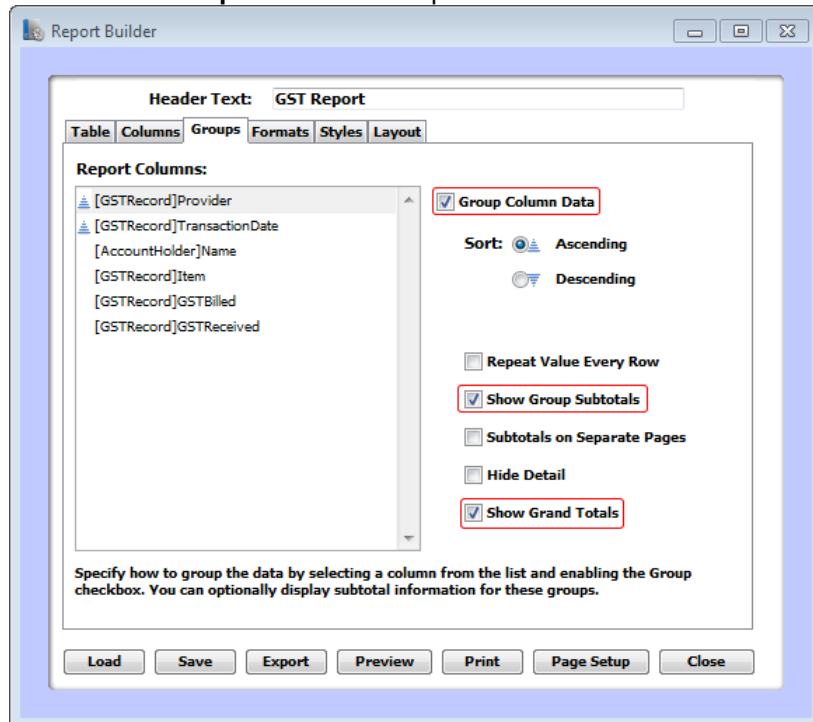


Click the **Columns** tab and select the fields as shown.

Note: In addition to the [GST Record] table, you also have access to the [AccountHolder], [Sale] and [Address Book] tables.



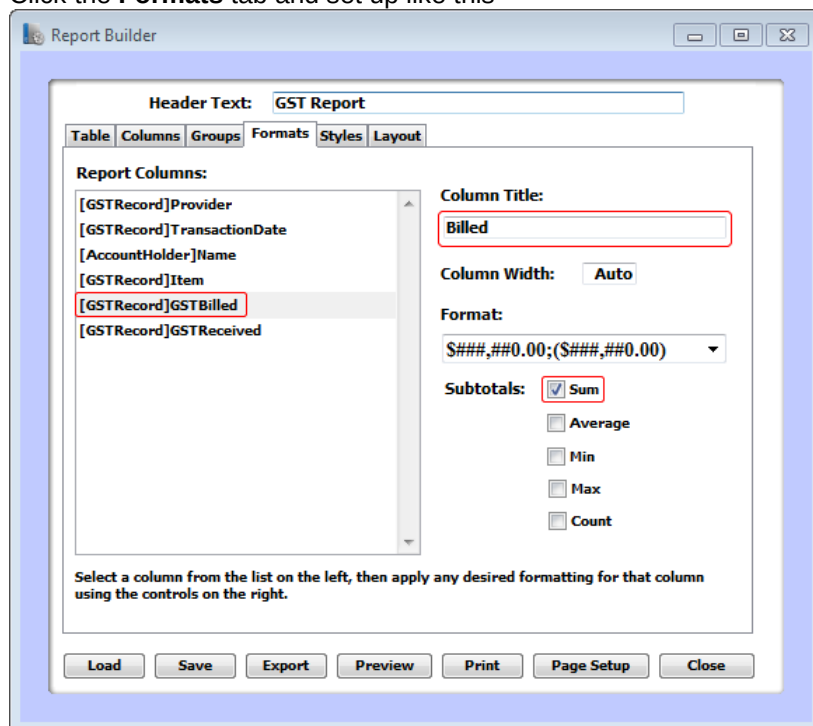
Click on the **Groups** tab and set it up to look like this.



Note: The **Provider** column is grouped so that the report will split the GST between providers and the **Transaction Date** column is grouped so it will sort the dates chronologically.

Selecting the *Show Group Subtotals*, when [GSTRecord] Provider is selected, and *Show Grand Totals* will subtotal each Provider's GST and give a Grand Total at the end of the report.

Click the **Formats** tab and set up like this



Note: If you do not select **Sum** for **GST Billed** and **GST Received** then these subtotals will not show up on the report.

Give your report a name and **Save** it, this way when you next go to print a GST Report through Maintenance and Reports all you will need to do is Print it!

Example 3: Printing a List of your Private Fees

Clicking on the Print icon in many of the windows in genie will open a report builder, this example demonstrates this.

Select **Open > Billing Items** and search (**Records > Search**) for all items where Private Fee field is 'not equal to zero' or 'is greater than zero'.

Click on the **Print** button to open the Report Builder and create a report like the following.

The Columns tab

The Groups tab

The Formats tab

Because the Description field contains a lot of text, we want to limit its width to about 300 points or so. You can now print your private fees!

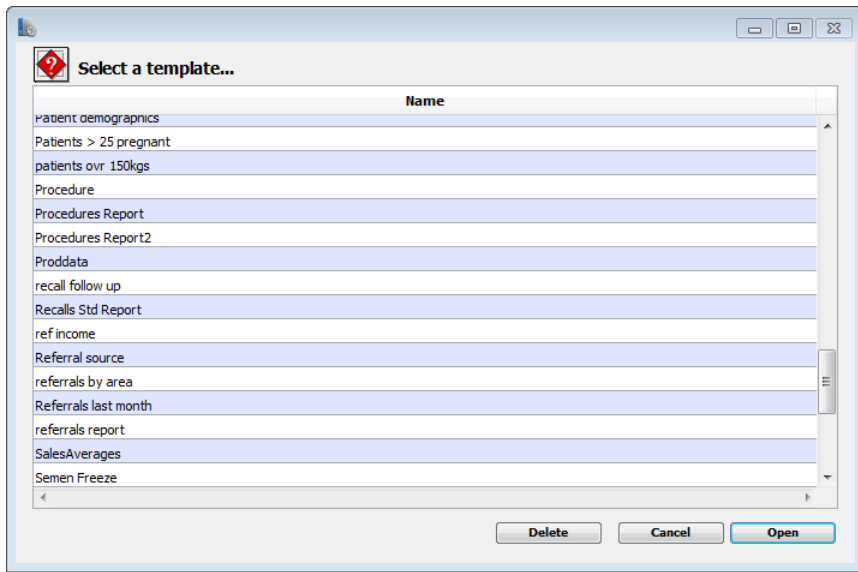
7.6.2 Saving/Loading Reports

Saving a Template

Reports can be saved as a template so you don't have to set up the tabs each time you perform the same search.

Once you have your report setup, click on the **Save** button at the bottom of the QuickReport window. You will be prompted to give the report a name. If there is already another report with the same name, you will be asked if you would like to overwrite that template or you can cancel this prompt to give the report a different name. Your QuickReport template is then saved within the data file so that it is available to all other computers on the network.

If the [Patient] example, used in the [Report Builder](#) section (Example 1), was saved then the next time you click on the **Print** button in the Patients List that report would automatically open or if you have created more than one template for the *Patient* table, you will first be prompted for which template to use. Select the template and click the **Open** button.



Loading a Template

To load a template, click on the **Load** button in the Report Builder window and select from the list of all saved templates. You would then perform your search as usual and print the report without having to setup each tab.

Note: To delete a template, click the Load button and select the report to delete, then click the Delete button.

7.7 Email

The Genie email module will send and receive mail to perform the following functions:

- Allow doctors to send/receive email to/from patients, keeping a record of the correspondence in the patient's notes if they wish.
- Exchange Genie data with other Genie users eg. patient correspondence.
- Send and receive appointment reminders for patients

Note: The email module provides basic sending and receiving capabilities and is not intended to be a replacement for all email correspondence, nor does it provide advanced message handling such as IMAP or Microsoft Exchange support. The email account you select will need to be POP3 compatible.

We recommend that a separate email account is set up with your ISP and maintained exclusively for use with the email module, to avoid bloating the data file with unwanted spam.

The email module can be accessed by navigating to **Open > Email**.

7.7.1 Setup

Email Accounts

Decide whether you would like just a single account for the practice, or whether you would like to have separate accounts for different users. An 'account' is essentially just a different email address.

By default, Genie creates an account with the name of 'Primary Account', which is then used by all the users on a network.

If you would like certain users to have their own account, open their User Preferences i.e. **File > User Preferences**, click on the **General** tab and tick the checkbox *Create a separate email account for me*. This will create a new account in this user's login name.

Account Details

For each email account you wish to use in Genie, you must enter the appropriate account settings. These details are supplied to you by your Internet Service Provider (ISP) and have nothing to do with Genie. If you are unsure

of them, copy them from your regular email program's preferences. If not, contact your ISP to find out these details. To configure an email account:

1. Go to **Open > Email**.

2. Select the account you wish to setup by clicking on the **Accounts** button  in the top right-hand corner of the window.

3. Click on the **Preferences** button .

4. The Preferences window will appear. Information about the contents of each page of this window appear below:

Account Tab

Fill in your account details in the window shown below. Use the example text to the right of the fields as a guide.

Preferences

Primary Account 1

Account Detail Advanced

Real Name: Genie Support Bob Smith

Email Address: support@geniesolutions.com.au bobsmith@host.com.au

Incoming Mail (POP3)

POP3 Server: mail.geniesolutions.com.au pop.host.com.au

Account Name: geniesupport bobsmith

Password: ***** this is the password you use to log into your email account at your ISP

Outgoing Mail (SMTP)

SMTP Server: mail.geniesolutions.com.au smtp.host.com.au

Use Authentication: ☐ Select this if you need to authenticate when sending mail. The username and password will normally be the same as for your incoming (POP3) mail.

PGP Password: this is the password you set when generating your encryption keys

Signature:

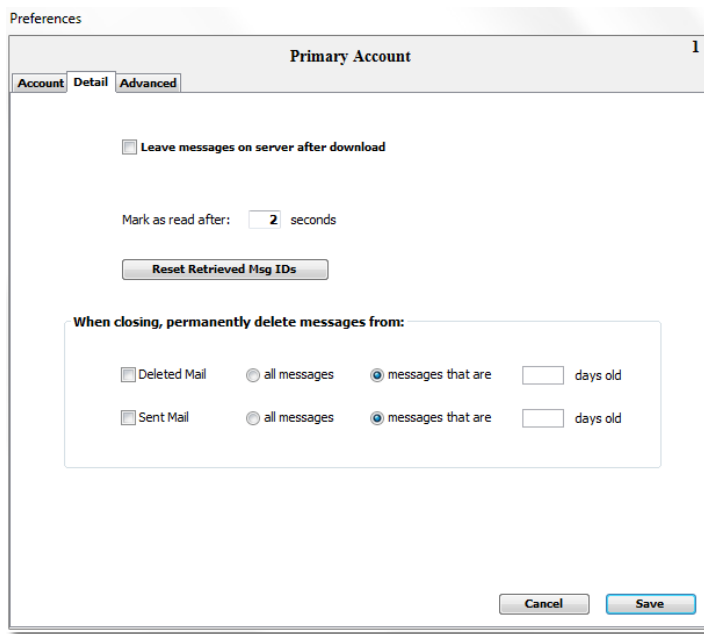
Cancel Save

Note: The Incoming Server commonly takes the form of either “mail.host.com” or “pop.host.com”. The Outgoing Server commonly takes the form of either “mail.host.com” or “smtp.host.com”.

The *Use Authentication* tickbox should be ticked if you authenticate your username and password when sending mail.

The 'Signature' is a customisable footer that you can choose to attach to all outgoing email from this account. Typically, it would hold your name and other contact details, such as phone and fax numbers.

Detail Tab



By default, once Genie has downloaded an email from your ISP, it is deleted from the ISP's server. However, if you tick the *Leave messages on server after download* checkbox, then Genie will delete them when you next perform a download after the specified number of days.

Note: It is recommended to tick this box so you can also download the messages into another email program eg. Outlook Express or Apple Mail, as it is not generally recommended to use the Genie email as your primary email program due to its simplicity.

When messages first arrive in the inbox, they are displayed in bold. Once you click on them, they are marked as read after the specified number of seconds, and then display in plain text.

If you find that there are messages downloaded into your other email program, but are not downloading into Genie email when you click **Get Mail**, then click the **Reset Retrieved Msg IDs**.

In this window, you can also specify that messages in your 'Sent' and 'Deleted' folders can be automatically deleted after a specified number of days. Deletion of these records occurs when you close the Email window. Only messages in the currently used Account are deleted, so if you have multiple Accounts but never open them, these old messages will never be deleted automatically.

Advanced Tab

This tab allows you to override the default mail server ports. You shouldn't have to change the default POP3 and SMTP Port numbers unless your ISP tells you that they use different ports. Clicking on the **Default** button will set the port number to what is default for your system.

The *Account Password* field can be used to prevent other users from accessing this window and accidentally changing your details.

Entering Email Addresses

Before you can send an email to someone else, you must have their email address recorded. Genie keeps email addresses in a separate table in the database. However, whenever you enter an email address into the Address Book (**Open > Address Book**) or the Patient Demographics window, Genie automatically creates an entry for that person in the Email Address table.



If you would like to add, modify or delete an email address, click on the **Address Book** button .

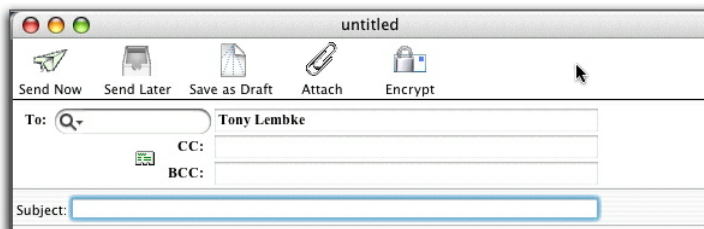
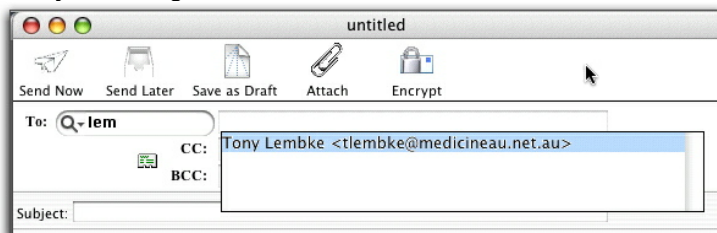
You should also add your own name and email address, to allow you to send a test message, as detailed below.

Send a Test Message

To make sure you have entered your email account details correctly, you should send a test message to yourself.



1. Click on the **New** button  to create a new email.
2. In the search bar next to the word **To:**, start typing your First or Surname, and a popup will appear displaying any matching email addresses.



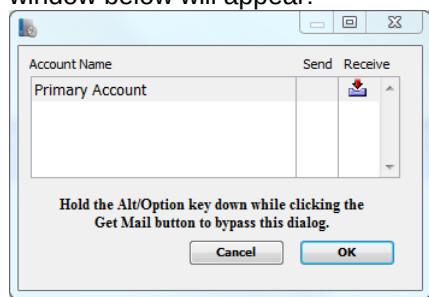
Use the mouse or press the **Enter** key to select the record you would like. If you have performed this correctly, your name should now be displayed in the **To:** field.

Note: Only the Enter on your numeric keyboard will allow you to select a record place of using the mouse.

The cursor should now be in the Subject area. Enter a subject like "Test", then press the **Tab** key on your keyboard to move to the body of the message. Type a few lines in the body, then click the **Send Now** button .

Assuming you are already connected to the Internet, Genie should send the message. If you get an error message, read it carefully. It will frequently tell you what the problem is e.g. an incorrect account password, or account login name.

If the message has been sent successfully, wait a few moments and then click on the **Get Mail**  button. The window below will appear:



Clicking on the **Send** and **Receive** icons will switch these options on and off. Because we don't actually have anything to send at the moment, click on the **Send** icon to switch it off, then click the **OK** button to retrieve any messages on your ISP's server.

The test message you just sent should now be in your Inbox.

Index

- A -

- ABN 55, 64
- Account History 182
 - Applying Credit 187
 - Changing Account Holder/Patient 186
 - Deleting a Payment 188
 - Deleting Invoice 187
 - Editing/Modifying Invoices 185
 - Find Batch 184
 - Itemized Receipt 184
 - Modifying an Item 186
 - Print Report 184
 - Print Statement 184
 - Refunds 188
 - Reprinting a Receipt 183
 - Reprinting an Invoice 183
- Account Holders 30
 - DVA 134
 - Medicare 134
 - Organisations 132
 - Patient 131
- Account Holders Report 376
- Account Messages 31
- Account Warnings 57
- ACIR 44
- Add User 383
- Address Book 27
- Administrator (Setting) 25, 384
- Aged Debtors Report 376
- Alcohol Audit 288
- AMA Fees (Importing) 154
- Applying Credit 187
- Appointments 78
 - Adding/Making 93
 - Button Description 85
 - Cancellation List 106
 - Change Date 46, 103
 - Check Forward Referrals 46
 - Copying 104
 - Delete 104
 - Double Booking 108
 - Fill Down 46
 - Finding 45
 - Interval 78
 - Linking Procedure 113
 - Moving 103
 - Preferences 78
 - Printing 83, 111
 - Repeating 109
 - Status 99
 - Today's 40
 - Types 95
 - Undelete 105
 - Views 88
- Appts Menu 44
- Archiving 396
 - Cut Off Limits 56
 - Pathology Results 372
 - Patient Correspondence 372
- Assistant Fee 149, 172
- Assistants Report 377
- Attaching Documents, Scans & Images 343
 - With ImagePro 256, 343
- Audit - Billing 378
- Audit - Patient Images 366
- Audit - Surgical 340

- B -

- Backups 8
 - Automated Backup 10
 - Restoring a Backup 13, 379
- Banking 189
 - Default Bank Account 64
 - Setting Up Bank Accounts 30
- Banking Summary 377
- Billing Items 31
- Billing Menu 36
- Billing V Income Report 373
- Blacklisted Accounts 132
- Bug Reports 24
- Bulk Bill/DVA Transmissions 202, 368

- C -

- Cancellation List 106
- Care Plans (see GP Management Plans) 286
- Centrelink Certificates 286
- Change Practice 25
- Change User 25
- Chart Numbers 56
- Check Integrity 371
- Checklists 310
 - Create 311
 - Download 50
- Clean Up Data File 366
- Clinic Name 54
- Clinical Module 264

Clinical Module 264
 Button Description 264
 Clinical Window - Overview 264
 Consultation Notes 273
 Adding 276
 Deleting 278
 Drawing Module 275
 Editing 276
 Fee to Charge 289
 Keeping Separate Consults 277
 Measurements 276
 Presenting Problem 274
 Printing 278, 282
 Viewing 278
 Consultation Summary 282
 Consumer Medicine Information 292
 Conversion Ratios 102, 341
 Copy Patient 46
 Correspondence Log 379
 Create Data Copy Script 379
 Credit Terms 58
 Cull Invoices 372
 Cull Records 41
 Culling Limits 56

- D -

Daily Billing Report 367
 Daily Transaction Report 367
 Data Maintenance 366, 371
 DB4's 37
 Default Bank Account 64
 Default Patient Type 57
 Default Receipt Type 57
 Delete 4D Preferences 365
 Delete User 383
 Deleted Sales/Payments Audit 378
 Deposits 168
 Accepting 168
 Applying 169
 Deleting 168
 List 36
 Diagrams 275
 Dictated Letters 40
 DMMR template 222
 Doctors Income 373
 Documents - Adding 284
 Drawing Module 275
 Drug Interactions 296
 Duplicate Records 35, 42
 DVA Account ID 55

- E -

Edit Account Types 37
 Edit Patient 100
 Electronic Correspondence (Sending via 3rd Party)
 234
 Checking Imported Letters 235
 Set Up 234
 Using 235
 Email (Setup) 417
 Letters 220
 Patient Records 41
 Employers 31
 Estimate PEFR 287
 Export Quickreport Templates 364
 Exporting Genie Data 26

- F -

Families - Creating 131
 Finding 39
 Making Appointments 86
 Feature Requests 24
 File Menu 24
 Flagging Patient Records 41, 249, 267

- G -

Genie Online Manual 52
 Geriatric Depression Scale 288
 GP Management Plans 286
 GST 55
 Report 377

- H -

Health Assessments 286
 Health Fund Fees 179
 Health Services Utilisation Report 381
 HealthLink 234
 Checking Imported Letters 235
 Configuring 237
 Using 235
 HIC Online 201
 Archive HIConline Claim Text 372
 Bulk Bill & DVA Claims 202
 Creating Transmissions 202
 Installation 195
 Location ID 56
 Online Patient Verification 212
 Patient Claims 207, 368

HIC Online 201
 PSI Store 379
 Receipting 207
 Retrieving Reports 204
 Reviewing Exceptions 205
 Troubleshooting 218
 Updating Certificates 215
 Uploading HIC Logs 379
 HL7 Tracking Pathology Results 365

- I -

ICD10 Codes 382
 Searches 404
 ICPC Coding 382
 Searches 404
 ImagePro 48, 253
 Synchronise Images 346
 Using 256, 343
 Viewing Images 345
 Images
 Attaching 343
 Creating Albums 348
 Searching 343, 345, 348
 Viewing 345
 Immunisations 270
 ACIR Reporting 44
 Import Offsite Logs 352
 Import Quickreport Templates 364
 Importing Genie Data 26
 Importing Letters 229
 Inactive Patients 41
 Increasing Private Fees 153
 INR Control 287
 Integrity Check 371
 Investigation Action List 31
 Investigation Audit 32
 Invoice Memos 58, 151
 Invoicing 131
 Adding Items 142
 Assistant's Fees 149
 Changing Incorrect Account Holder/Patient 186
 Creating 134
 Deferring 157
 Deleting 55, 187
 Editing 185
 Item Information 144
 Memos 58, 151
 Multiple Procedure Rule 147
 Notes 144
 Organisations 136

Patients without Appts 157
 Reprinting 183
 Searching Items 145
 Selecting Practice 146
 Selecting Site 146
 Service Date 144
 Service Time 144
 Storing 157
 Time Spent 144
 Workcover 137

Item Number (Default) 66
 Item Report 375
 Itemised Receipt 184
 IVF Treatment Cycles 33

- K -

Keyboard Shortcuts 3

- L -

Labels 261
 Laboratory Demographics 26
 Lesion Module 285
 Letter Templates (see also Merged Letter Templates) 241
 Letterhead - Practice 58
 Letters (see also Referral/Reply Letters) 218
 Location ID 56
 LSPN 71

- M -

Macros 221, 275
 Maintenance & Reports 364
 Manual - Genie 52
 Manual Batching 190
 Creating a Batch 191
 Dealing with Exceptions 194
 Receipting 193
 Marking Patients 39
 Measurements 276
 Medicare Account ID 55
 Medicare Claim Forms 55
 Merged Letter Templates 241
 Creating Letter 243
 Printing 246
 Quote Templates 175
 Saving 244
 Setting Up 242
 Merging Patients 42
 MIMS 33, 290

MIMS 33, 290
 Disclaimer 364
 Mini Mental State Exam 288
 Modify Today's Consultation 282
 Multiple Procedure Rule 147

- N -

NATA Number 55
 New Consultation 282
 NPCC Report 380
 NPS RADAR 33, 293
 Nursing Home Sheet 292

- O -

Offsite Logging 348
 Copying Data File 349
 Import Logs 352
 Limitations 352
 Setup 348
 Starting 26
 Using 350
 Online Claiming 201
 Online Patient Verification 212
 Open Menu 27
 Overdue Accounts 57, 376
 Overdue INR 43
 Overdue Smears 43
 Overseas Students
 Print Claim Form 55
 Ozescribe & Syberscribe 232

- P -

Paid on Day 375
 Pap Smears - Adding 266
 Overdue 43
 Passwords 389
 Pathology 318
 Add 284
 Audit 32
 Creating Sets 320
 Graphing 267
 Investigations Action List 251
 Ordering 319
 Recalls 251
 Reprinting Request Forms 320
 Request Template 321
 Results 325
 Tracking 276, 365
 Patient Claims 207, 368

Patient Correspondence (See Referral/Reply Letters) 218
 Patient Handouts 33
 Patient Type 375
 Patients Menu 39
 Payment Report 378
 Pending Deliveries 43, 48
 Percentile Charts 287
 PIT Results 267, 277
 Practice Details 54
 Practice Letterhead 58
 Practice Management Module 364
 Practice Management Reports 373
 Practice Sites 71
 Practice Type 26
 Pre-Op Notification Check 130
 Prescriber Number 64
 Prescriptions 290
 Adding Drugs 297
 Adding Script to Patient 294
 Button Description 292
 Display 290
 Editing 291
 Interactions 296
 Polypharmacy 299
 Printing 292, 300
 QuickScripts 295
 Searching 298
 User Added Drug 298
 Printing Complete Clinical Record 282
 Printing Preferences 74
 Troubleshooting 76
 Private Health Funds Fees 179
 Procedures 332
 Adding 284, 333
 Audit 338, 340
 Booking 113
 Details Tab 337
 Op-Notes Tab 338
 Pending 46, 335
 Post-Op Notes Tab 338
 Pre-op Notifications 130, 337
 Pre-op Tab 337
 Quote Tab 338
 Quotes 171
 Templates 339
 Theatre Lists 126
 Provider Number 64
 Provider Type 64

- Q -

Queries & Searches 398
 Query Editor 398
 Quick History (Billing) 36, 283
 Quick Reports 407
 QuickScript 295
 Quitting 26
 Quotes 171
 Invoicing from 178
 Preparing 172
 Printing 175
 Templates 175

- R -

Radiology 318
 Audit 32
 Ordering 322
 Recalls 251
 Reprinting Request Form 323
 Request Templates 323
 Results 325
 Readdressbutton3 221
 Rebuild Indices 366
 Recalls - Adding 246, 309
 Flagging Patient Record 249
 Overdue INR's 43
 Overdue Smears 43
 Pathology/Radiology 251
 Printing 247, 250
 Templates 246
 Receipting 157
 By Invoice Number 36
 Default Receipt Type 57
 Deleting 188
 Existing Invoice for Patient 159
 From an Invoice 157
 Incorrect Payment Type 190
 Organisation 161
 Paying the Gap 161
 Troubleshooting 159
 Reception Module 78
 Records Menu 34
 Referral Report 377
 Referral/Reply Letters 218
 Button Description 218
 Default Template Set Up 222
 Editing Templates 227
 Electronic Correspondence (Sending via 3rd Party) 234
 Importing Letters 229, 233

New Template 223
 Reviewing Letters 228, 331
 Reviewing Letters - Offsite 228, 332
 Registering Genie 26
 Remittance Advice 57
 Remove an Item from a Drop-down menu 3
 Replacing Field Entries 35
 Reporting 367, 369, 373
 Reset ID Numbers 365
 Reviewing Letters 228, 331
 Offsite 228, 332

- S -

Sales Report 378
 Scanning 252
 With ImagePro 256
 SCP ID 55
 Searches 398
 ICPC & ICD10 Searches 404
 Security 383
 Edit Groups 385
 Setting/Increasing Private Fees
 On the Fly 144, 153
 Shortcuts 3
 Show All Records 34
 Sign Off Field 64
 Software Updates 48, 391
 Special Menu 48
 Specifying Fee to Charge 289
 Stored Accounts 369
 Syberscribe 232
 Synchronise Images 346

- T -

Tasks 259
 Theatre Lists 126
 Printing 129
 Set Up 127
 Thyroid Control 287
 Today's Consultation 40
 Tools Menu 282
 Track Pathology Results - HL7 365
 Transaction Report (Daily) 367
 Transcription Services 232
 Troubleshooting - Network
 HIC Online 218
 Printing 76

- U -

- Update Ages 42
- Updates 391
 - Fees 179
 - Genie Software 392
- User Levels 384
- Using Highlighted Entries in a List 34

- V -

- Vaccinations 270
- VSP Number 54

- W -

- Web Update 394
- Website 52
- Workcover 137
 - Certificates 284