

# Training Guide: ReferralNet Secure Messaging

Sending and Receiving in Genie

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## Receiving Secure Messages on Genie

Genie checks the **Incoming** folder for messages every 5 minutes. If it finds a new message, it will import the message into Genie automatically.

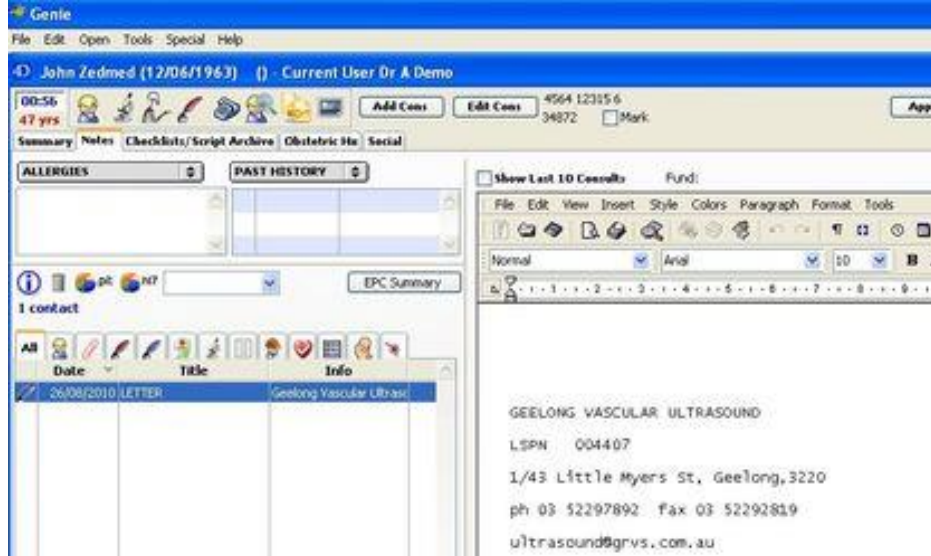
1. To review any incoming letters, click **Incoming Letters** on the **Open** menu.



2. Genie will try to match the letter as best it can to a patient in the database. Once the letter is matched by Genie, you can click **Link** to link the message to the patient's clinical record. If the patient is not available in the database, you can create that new patient by clicking **New**. Once the patient record is created, you can click **Link** to link the message.



3. Click **Clin** to open the patient record and see the message attached and displayed within that patient record.



Note:

If the incoming letter is received in RTF format then the linking process is slightly different depending on whether you have the Import RTF Letters to 4D Write ticked in your 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. If they come in as blank or scrambled letters then you will need to untick this 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.

## Sending Secure Messages on Genie

1. Click **Patients** on the **Open** menu.
2. A **Search Patients...** window will appear to allow you to search for an existing patient in the Genie database.

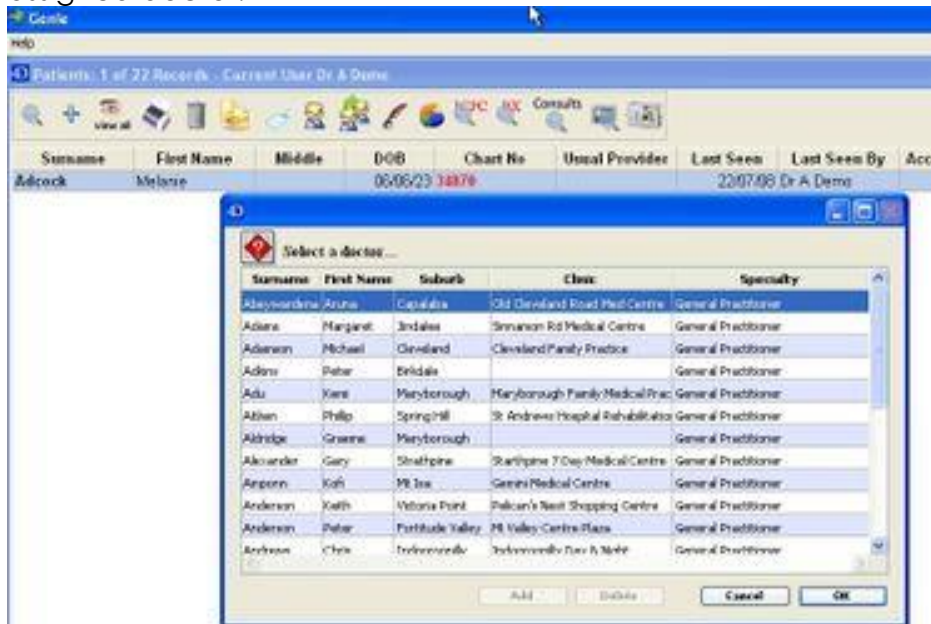
3. Click **Quill Pen** icon on the search result window.

Surname	First Name	Middle	DOB	Chart No	Usual Provider	Last Seen	Last Seen By
Adcock	Melanie		06/06/23	34870		22/07/08	Dr A Demo

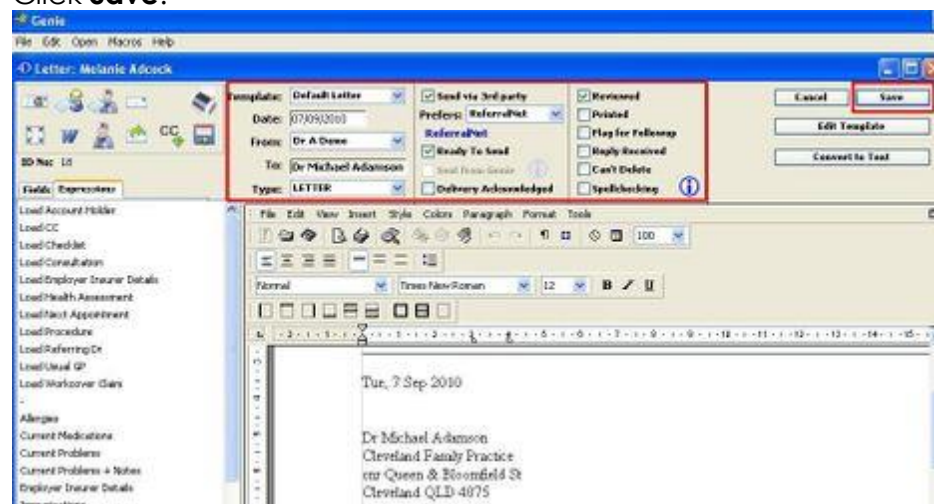
4. Search for a doctor to send the referral letter to if a doctor is not assigned to the patient

Surname	First Name	Middle	DOB	Chart No	Usual Provider	Last Seen	Last Seen By
Adcock	Melanie		06/06/23	34870		22/07/08	Dr A Demo

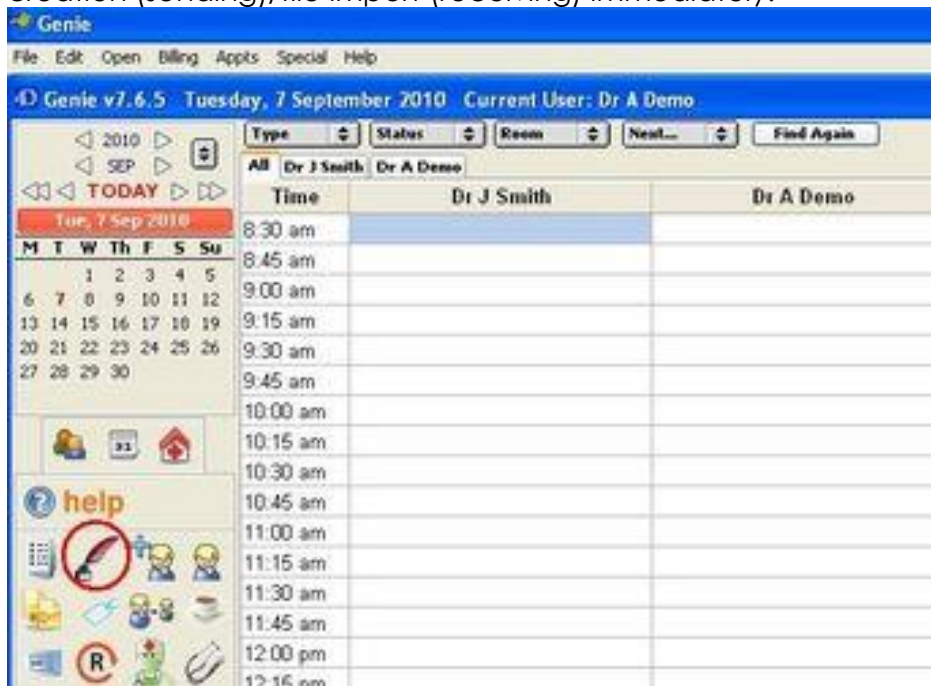
5. Or select a doctor to send the referral letter to if the patient has more than one assigned doctor.



6. On the letter writer window:
  - o Make sure the recipient has a ReferralNet username configured in the address book.
  - o Click **Send via 3rd party**.
  - o Select **ReferralNet** from the **Prefers** drop down list. (note that if the recipient is configured to have ReferralNet as their preferred messaging delivery method, this step will not be necessary)
  - o Click **Ready To Send**.
  - o Click **Reviewed**.
  - o Click **Save**.



- Genie will create the outbound file and stage it in the **Outgoing folder** every 10 minutes. To expedite the SENDING and RECEIVING action of Genie, go to the **Appointment** screen and click **(Ctrl+Click)** on the **Quill Pen** icon to force the file creation (sending)/file import (receiving) immediately.



### **FIX for issue: Genie does not recognise the ReferralNet folder**

The following command needs to be run in Genie Solo on the server computer. This would mean no one can use Genie when you are doing this. As such, you may wish to wait until the end of the day or when it is convenient time to do so.

1. Shut down the Genie Server.
2. Start up Genie Solo.
3. Click **Execute Command** in the **File** menu and enter this command line:  
**AddSendingCarrier ("ReferralNet")**
4. Contact Genie Support if you get an error at this stage. If there are no errors and it looks like nothing happened and just returns to the **Execute Command** window, then the fix is a success.
5. If you don't get any errors, shut down Genie Solo and restart Genie Server.
6. Log back into the client machine.
7. Check to see if ReferralNet is now showing in the Correspondence Log window.
8. If it is not, please contact Genie Support.