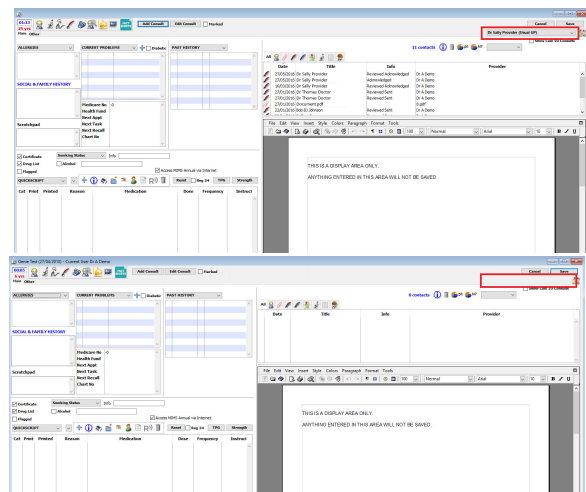# Genie Sending - CC Messages in Genie

## CCing messages in Genie

### Referrers, Usual GP and Interested Parties

When sending a message, even without CCs, you can modify regularly sent to recipients for quick access.

If the patient has a Usual GP or an active Referral, it will appear in the top right of the patient's file like below:
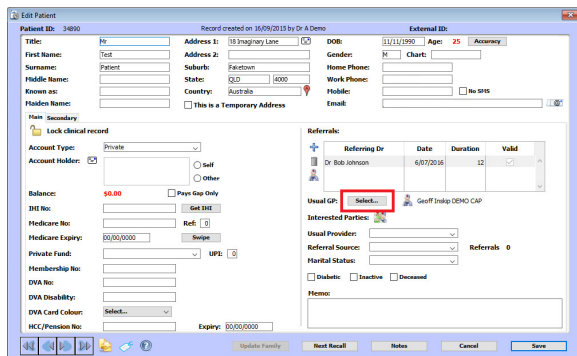


### Adding a Usual GP

1. To add a Usual GP to a patient's file, open up the patient and then click the **Edit Record** button or click **Ctrl+E/Cmd+E**
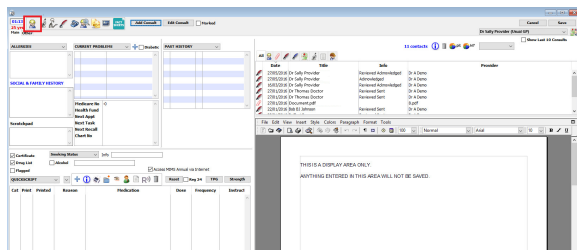


2. Here you will find the ability to attach a provider to a patient to list them as their Usual GP. You do this by clicking **Select..** and searching for the provider through the typical search function.



### Adding a Referrer/Active Referral

1. To add a Referrer to a patient's file, open up the patient and then click the **Edit Record** button or click **Ctrl+E/Cmd+E**
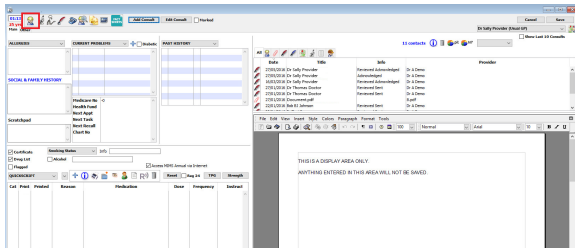
2. Here you will find the ability to create a new referral/new referrer. You do this by clicking the **Plus** besides the Referrals part of the patient's record.
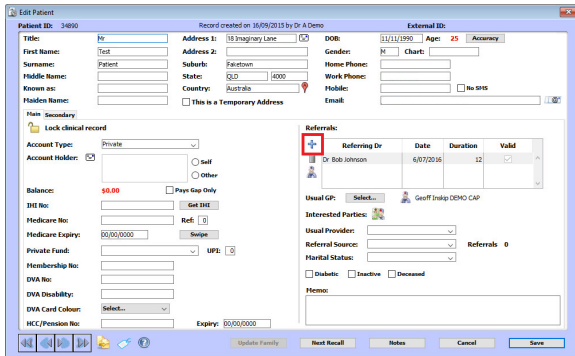


3. Search for the provider you wish to be a referrer using the typical Genie provider search.

4. Supply the relevant referral details and length and click **OK.**

## Adding to the Interested Parties list

1. To add to the Interested Parties list for a patient's file, you can get there a couple ways. The first is by going to **Edit Record** or clicking **Ctrl+E/Cmd+E.**
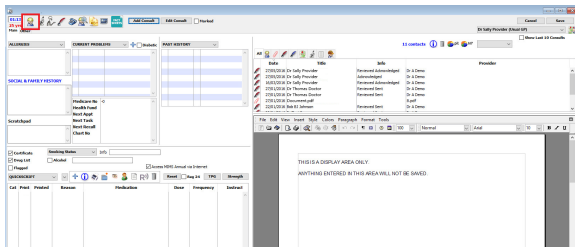


2. From here you click on the icon beside **Interested Parties:**
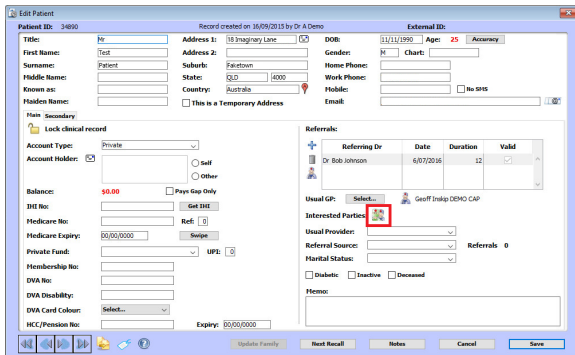


3. You can add and delete entries in here as you wish.

4. You can also get to the **Interested Parties** window by clicking on the **icon besides** where the **Usual GP/Referrer** drop down box is, **right below** the **Save** button.



## Sending the letter

1. Create a letter as per normal through Genie.



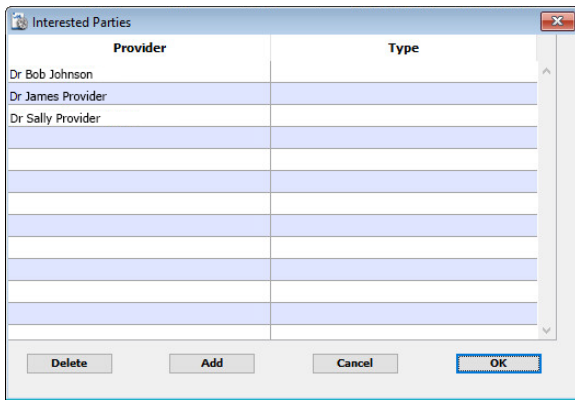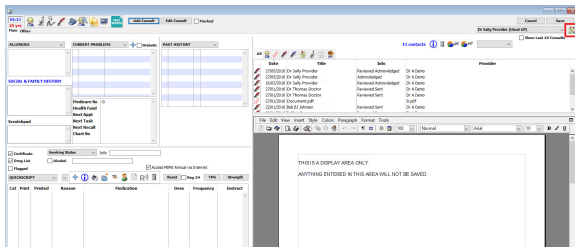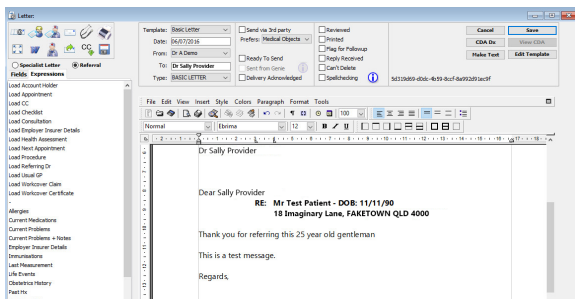2. Once the letter is open, you click on the **CC icon** with an arrow facing down. There are a few predefined options, such as Usual GP, Referring Doctors, etc. These options can be configured further up in this guide under **"Referrers, Usual GP and Interested Parties"**.
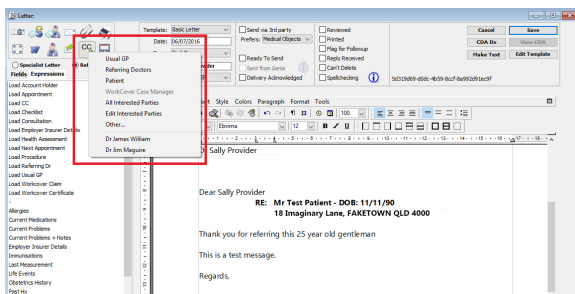


Finding someone in the Address Book

If you select one of the previously configured options such as Usual GP or Referring Doctors, continue to **Step 3**. If you wish to search the Genie Address Book to find someone to send to, continue to **Step 2a**.
   a. Select the **Other..** option.
   b. Search using the typical Genie provider search to find the provider you wish to CC.

c. It will then ask you if you would like to have this provider included as an Interested Party. Choose your option.

3. Once you have selected a CC to send to, it will prompt with the usual Priority and Requested Action options.



4. Once these steps have been completed, you will need to choose your options to what you would like the letter to do. Continue reading for different options and variations on sending.

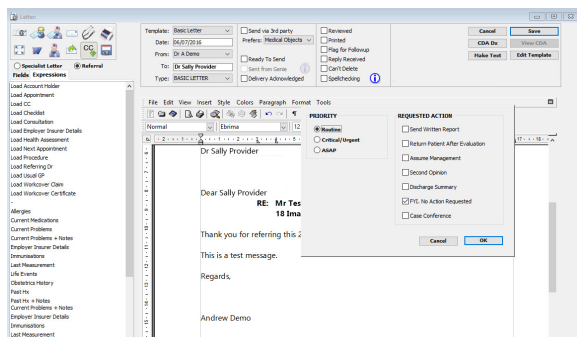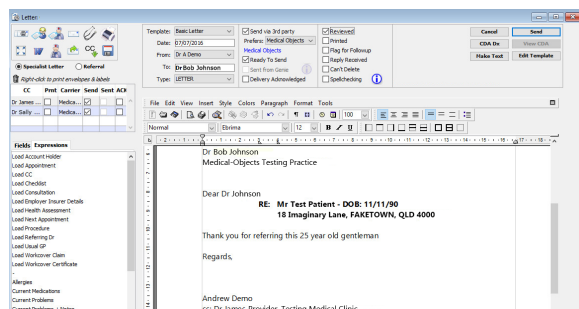## Send to everyone through Medical-Objects

If you want everyone listed on the letter to receive the message via Medical-Objects, you will need to confirm the **Send** button on the left hand side under CCs is ticked for all parties. Once they are ticked as Send, you can confirm the main addressee is set to receive via Medical-Objects as the Send via 3rd Party checkbox at the top. Once the message is finalised to then send via Medical-Objects, tick **Ready To Send**.



## Send to ONLY the CC through Medical-Objects

If you only want the CC to receive the message via Medical-Objects you will need to **untick** Send via 3rd Party at the top of the message for the main address, and confirm the **Send** tickbox under the corresponding CC is ticked. Once the Ready To Send tickbox is selected it will drop off a file to only route to the CC, leaving the main addressee to be sent via another means (mail or fax).
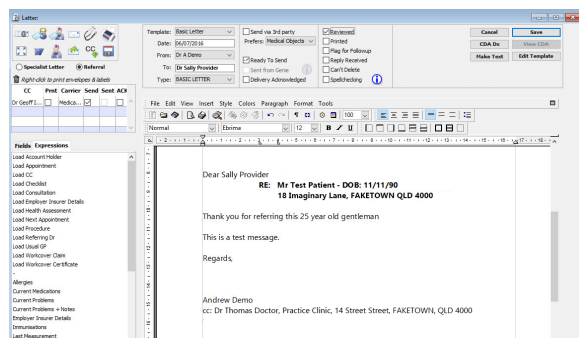


## Sending to specific CCs through Medical-Objects

Example:

Letter:

Template: Basic Letter
Date: 07/07/2016
From: Dr A Demo
To: Dr Bob Johnson
Type: LETTER

Send via 3rd party
Prefers: Medical Objects
Medical Objects
Ready To Send
Sent from Genie
Delivery Acknowledged

Reviewed
Printed
Flag for Followup
Reply Received
Can't Delete
Spellchecking

Cancel
CDA Dx
Make Text

Send
View CDA
Edit Template

Specialist Letter    Referral

Right-click to print envelopes & labels

CC    Prnt Carrier Send Sent AC#
Dr Bert ...          Medica...
Dr James ...        Medica...
Dr Sally ...         Medica...

Fields   Expressions

Load Account Holder
Load Appointment
Load CC
Load Checklist
Load Consultation
Load Employer Insurer Details
Load Health Assessment
Load Next Appointment
Load Procedure
Load Referring Dr
Load Usual GP
Load Workcover Claim
Load Workcover Certificate

Allergies
Current Medications
Current Problems

File   Edit   View   Insert   Style   Colors   Paragraph   Format   Tools

Normal          Ebrima          12

Dr Bob Johnson
Medical-Objects Testing Practice

Dear Dr Johnson

RE:   Mr Test Patient - DOB: 11/11/90
        18 Imaginary Lane, FAKETOWN, QLD 4000

Thank you for referring this 25 year old gentleman

Regards,

Andrew Demo