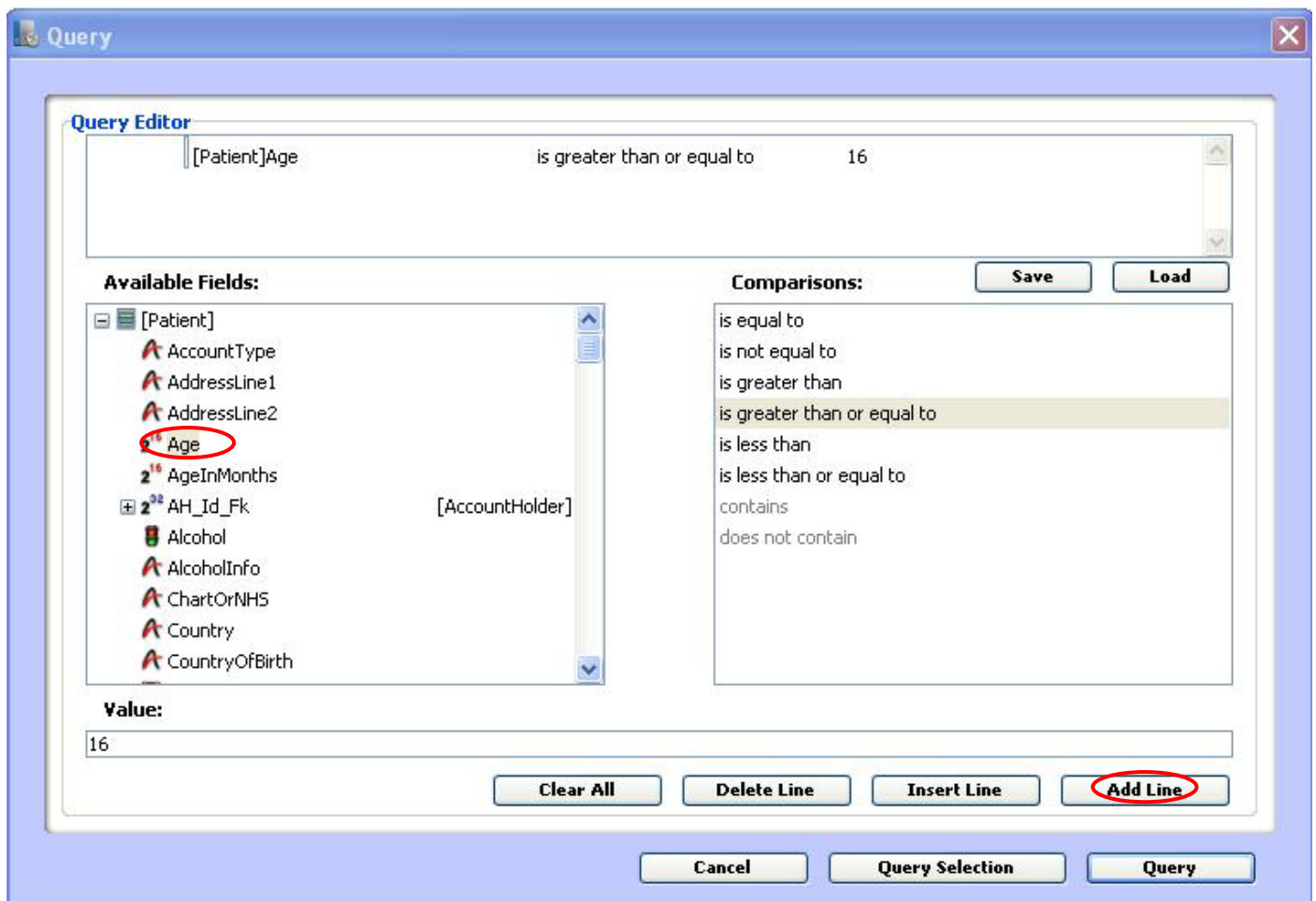


## Using Genie for patient recall and reminders

### Preparing a patient recall list

Recalling male patients aged 16 to 18 years:

1. Open your Genie software.
2. In the 'Open' menu, select the 'Patients' tab.
3. Cancel patient search box.
4. In the 'Records' menu, click 'Search'. This opens the Query window.
5. Under 'Available Fields' expand the [Patient] field. Select age.
6. Under 'Comparisons:' select 'is greater than or equal to', and type 16 in the 'Value' box.
7. Select 'Add Line'.



The screenshot shows the 'Query Editor' window in the Genie software. The main query area displays: [Patient]Age is greater than or equal to 16. Below this, the 'Available Fields' list on the left includes [Patient] expanded, showing fields like AccountType, AddressLine1, AddressLine2, Age (highlighted with a red circle), AgeInMonths, AH\_Id\_Fk, Alcohol, AlcoholInfo, ChartOrNHS, Country, and CountryOfBirth. The 'Comparisons:' list on the right includes options like 'is equal to', 'is not equal to', 'is greater than', 'is greater than or equal to' (highlighted), 'is less than', 'is less than or equal to', 'contains', and 'does not contain'. The 'Value:' field at the bottom left contains the number 16. At the bottom right, the 'Add Line' button is circled in red. Other buttons visible include 'Clear All', 'Delete Line', 'Insert Line', 'Cancel', 'Query Selection', and 'Query'.

8. Under 'Available Fields' select age, under 'Comparisons:' select 'is less than or equal to', and type 18 in the 'Value' box.
9. Select 'Add Line'.

**Query**

**Query Editor**

	[Patient]Age	is greater than or equal to	16
And	[Patient]Age	is less than or equal to	18

**Available Fields:**

- [Patient]
  - AccountType
  - AddressLine1
  - AddressLine2
  - Age**
  - AgeInMonths
  - 2<sup>32</sup> AH\_Id\_Fk [AccountHolder]
  - Alcohol
  - AlcoholInfo
  - ChartOrNHS
  - Country
  - CountryOfBirth

**Comparisons:**

- is equal to
- is not equal to
- is greater than
- is greater than or equal to
- is less than
- is less than or equal to**
- contains
- does not contain

**Value:**

18

Clear All Delete Line Insert Line **Add Line**

Cancel Query Selection Query

- Under 'Available Fields' select 'Sex', under 'Comparisons:' select 'is equal to', and type male in the 'Value' box.
- Select 'Add Line'.
- Select 'Query'.

**Query**

**Query Editor**

	[Patient]Age	is greater than or equal to	16
And	[Patient]Age	is less than or equal to	18
And	[Patient]Sex	is equal to	male

**Available Fields:**

- 2<sup>16</sup> ReferralDuration
- 2<sup>32</sup> ReferralsMade
- ReferralSource
- 2<sup>32</sup> Referrer\_AB\_Id\_Fk [AddressBook]
- ReferrerProviderNum
- ReferringDoctor
- Scratchpad
- Sex**
- SmearResult
- 2<sup>16</sup> SmokingFreq
- SmokingInfo
- State

**Comparisons:**

- is equal to**
- is not equal to
- is greater than
- is greater than or equal to
- is less than
- is less than or equal to
- contains
- does not contain

**Value:**

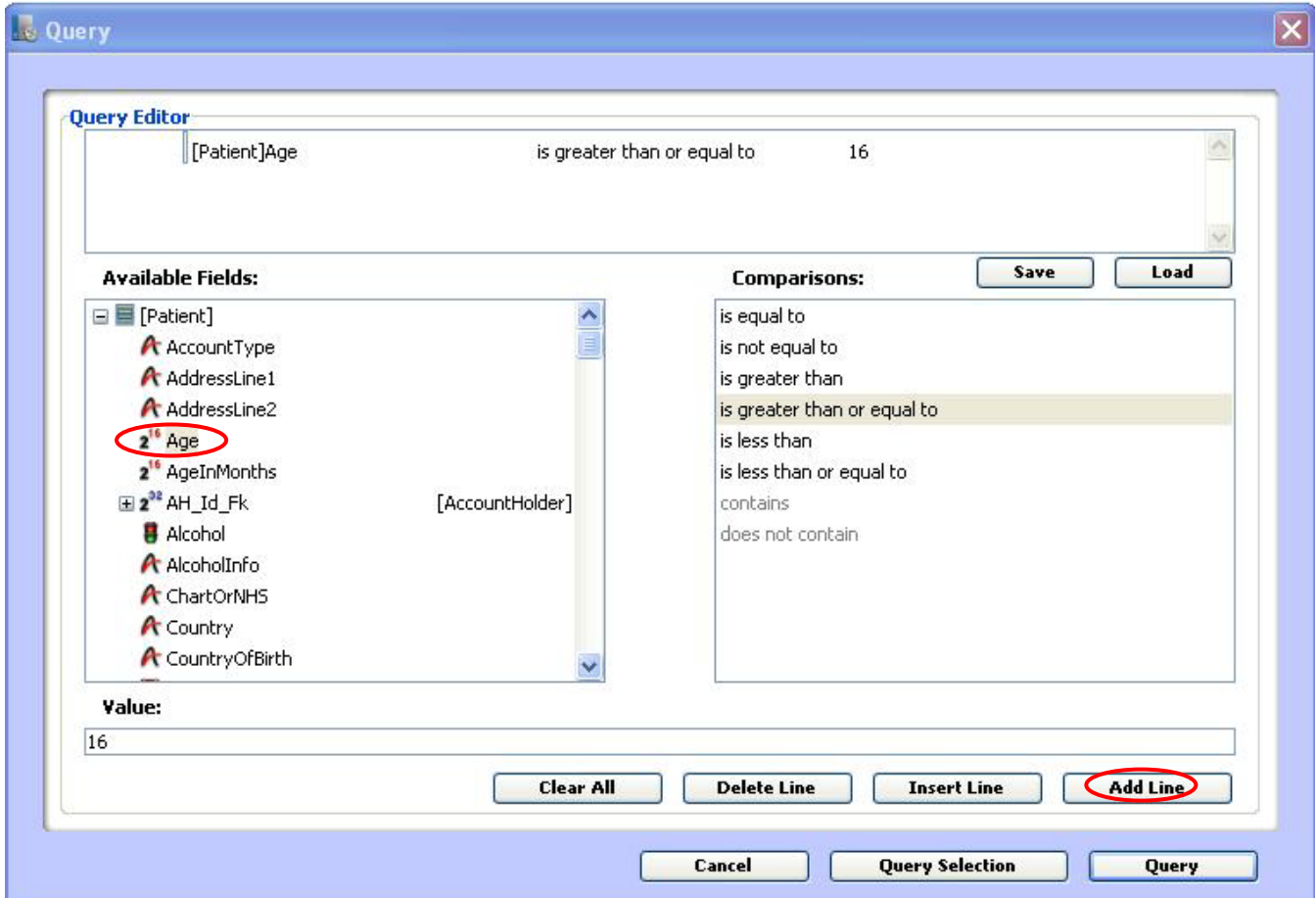
male

Clear All Delete Line Insert Line **Add Line**

Cancel Query Selection **Query**

Recalling male patients aged 16 to 26 years:

1. Open your Genie software.
2. Open the 'Patients' tab.
3. Cancel patient search box.
4. Open the 'Records' tab and click search.
5. Under 'Available Fields' select age, under 'Comparisons:' select 'is greater than or equal to', and type 16 in the 'Value' box.
6. Select 'Add Line'.



Query Editor

[Patient]Age is greater than or equal to 16

**Available Fields:**

- [Patient]
  - AccountType
  - AddressLine1
  - AddressLine2
  - Age**
  - AgeInMonths
  - AH\_Id\_Fk [AccountHolder]
  - Alcohol
  - AlcoholInfo
  - ChartOrNHS
  - Country
  - CountryOfBirth

**Comparisons:**

- is equal to
- is not equal to
- is greater than
- is greater than or equal to**
- is less than
- is less than or equal to
- contains
- does not contain

**Value:**

16

Clear All Delete Line Insert Line **Add Line**

Cancel Query Selection Query

7. Under 'Available Fields' select age, under 'Comparisons:' select 'is less than or equal to', and type 26 in the 'Value' box.
8. Select 'Add Line'.
9. Under 'Available Fields' select gender, under 'Comparisons:' select 'male'.

**Query**

**Query Editor**

	[Patient]Age	is greater than or equal to	16
And	[Patient]Age	is less than or equal to	26

**Available Fields:**

- AddressLine1
- AddressLine2
- Age**
- AgeInMonths
- 2<sup>32</sup> AH\_Id\_Fk [AccountHolder]
- Alcohol
- AlcoholInfo
- ChartOrNHS
- Country
- CountryOfBirth
- CreationDate
- Creator

**Comparisons:**

- is equal to
- is not equal to
- is greater than
- is greater than or equal to
- is less than
- is less than or equal to
- contains
- does not contain

**Value:**

26

**Buttons:** Clear All, Delete Line, Insert Line, **Add Line**, Cancel, Query Selection, Query

10. Select 'Add Line'.

11. Select 'Query'.

**Query**

**Query Editor**

	[Patient]Age	is greater than or equal to	16
And	[Patient]Age	is less than or equal to	26
And	[Patient]Sex	is equal to	male

**Available Fields:**

- ReferralSource
- 2<sup>32</sup> Referrer\_AB\_Id\_Fk [AddressBook]
- ReferrerProviderNum
- ReferringDoctor
- Scratchpad
- Sex**
- SmearResult
- 2<sup>16</sup> SmokingFreq
- SmokingInfo
- State
- StreetDescription
- StreetNum

**Comparisons:**

- is equal to
- is not equal to
- is greater than
- is greater than or equal to
- is less than
- is less than or equal to
- contains
- does not contain

**Value:**

male

**Buttons:** Clear All, Delete Line, Insert Line, **Add Line**, Cancel, Query Selection, **Query**

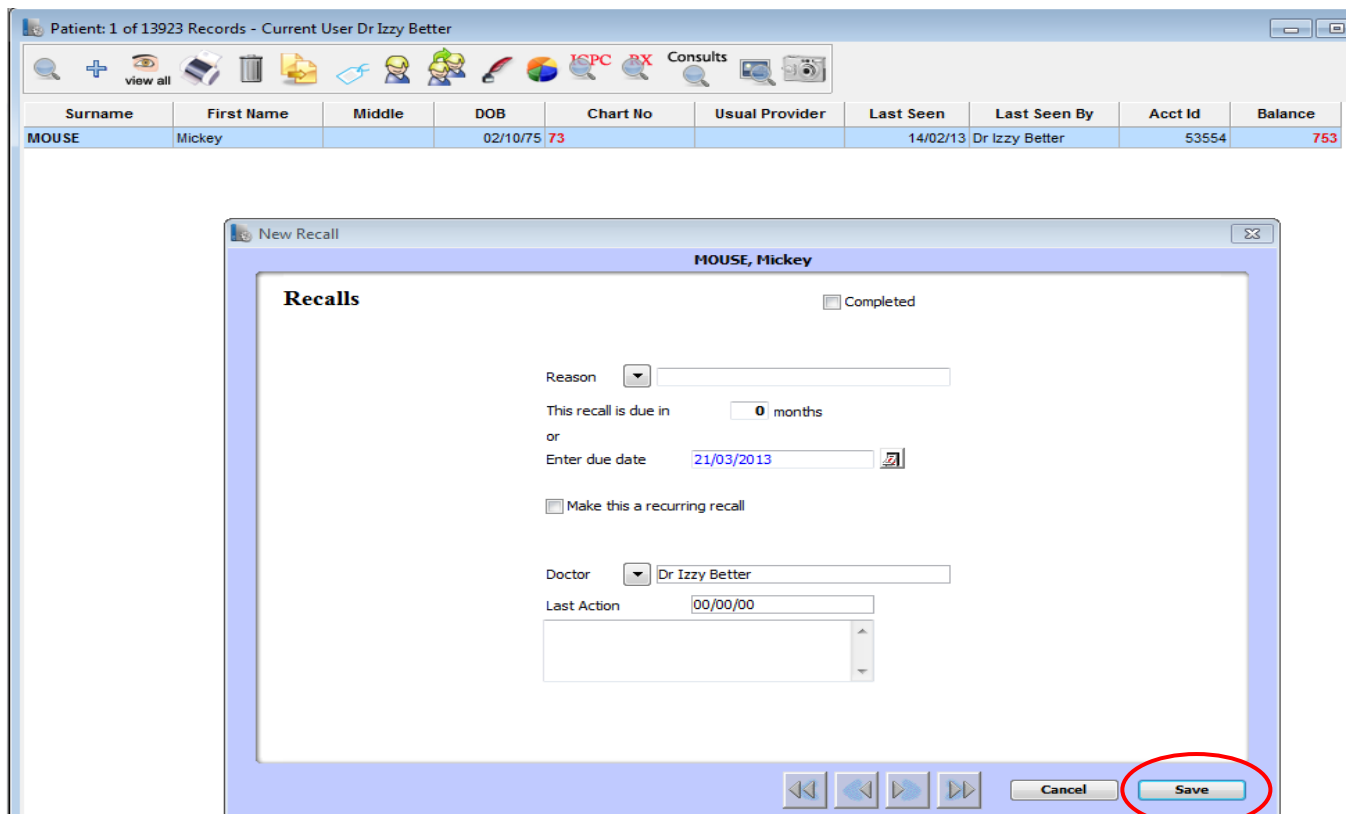
## Preparing recall letters and mailing labels

1. Leave the patient list open after running the query.
2. Select 'yellow pages' icon at the top.
3. Select 'merge letter' template.
4. Select 'template' and merge your letter.
5. Print.
6. After printing the recall letters leave the patient list open and select the 'labels' icon (directly to right of yellow pages icon).
7. Select 'patient address'.
8. Print labels.



## Recording patient recall 'reason' and date sent in patient records

1. When the patient list is open, enter each recall individually.
2. Select the patient from the patient list (mickey mouse in example below).
3. Go to the patient menu and select add recall.
4. Add the required details and click 'Save'.



The screenshot shows a software window titled 'Patient: 1 of 13923 Records - Current User Dr Izzy Better'. The toolbar contains several icons, with the 'yellow pages' icon (a yellow circle with a white 'Y') and the 'labels' icon (a blue circle with a white 'L') circled in red. Below the toolbar is a table with columns: Surname, First Name, Middle, DOB, Chart No, Usual Provider, Last Seen, Last Seen By, Acct Id, and Balance.

The table contains one row for Mickey Mouse:

Surname	First Name	Middle	DOB	Chart No	Usual Provider	Last Seen	Last Seen By	Acct Id	Balance
MOUSE	Mickey		02/10/75	73		14/02/13	Dr Izzy Better	53554	753

Below the table is a 'New Recall' window for Mickey Mouse. The window has a 'Recalls' section with the following fields:

- Reason:** A dropdown menu.
- This recall is due in:** A text box with '0' months.
- or**
- Enter due date:** A date picker showing '21/03/2013'.
- Make this a recurring recall:** A checkbox.
- Doctor:** A dropdown menu showing 'Dr Izzy Better'.
- Last Action:** A text box showing '00/00/00'.

At the bottom of the window are navigation buttons (back, forward, etc.) and a 'Save' button circled in red.

### **Adding a reminder for when the next immunisation is due**

When a patient attends for immunisation, mark the recall as complete and enter a new reminder for when the patient next requires immunising.