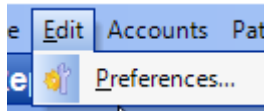
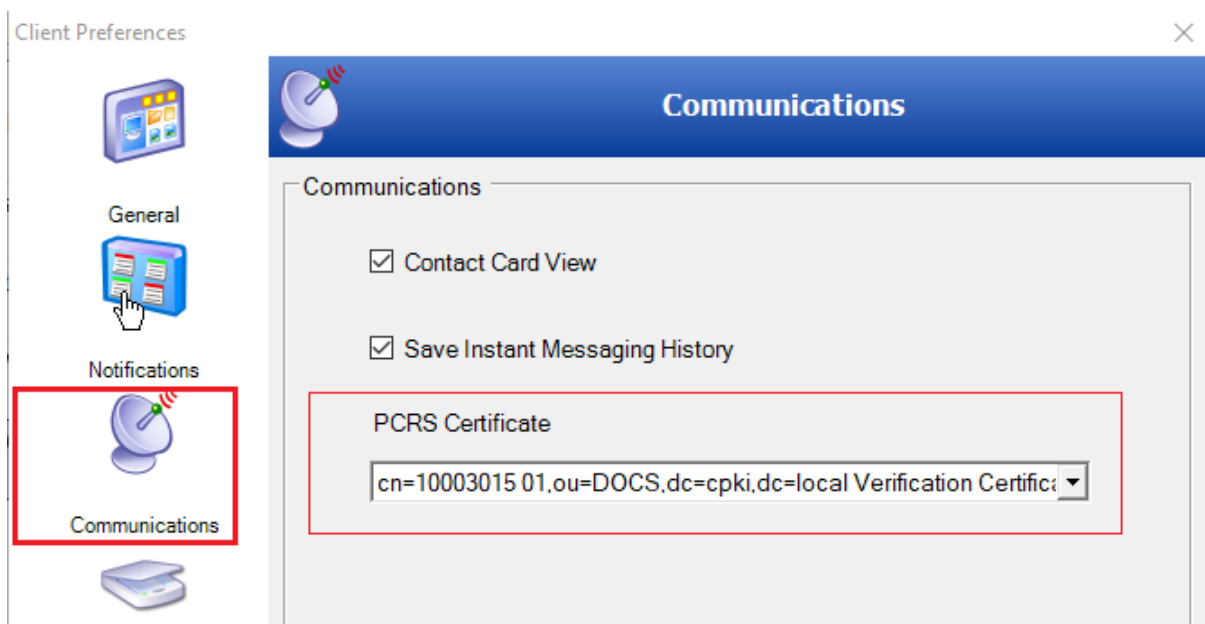


1. PCRS Certificate

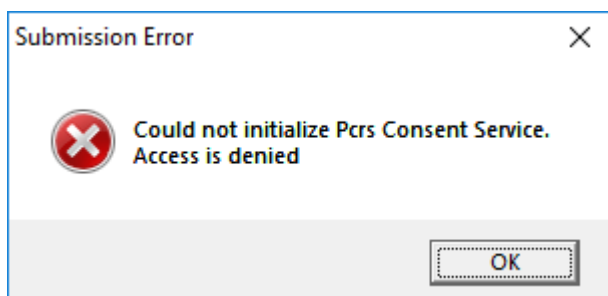
Ensure the correct PCRS certificate is selected in Edit > Preferences.



Select Communications tab and select the PCRS Verification Cert from the dropdown list and click OK.



If you are receiving this error then you either have an expired PCRS certificate or you have not selected the correct PCRS Certificate in Edit > Preferences on this machine.



Check your PCRS Certificate's expiry date or confirm you can login to the PCRS Application suite. If you need a new certificate please contact PCRS. Once the Certificate is installed ensure you select the certificate in edit > preferences.

2. Cycle of Care Protocol Visits

Step 1: Click **Add Visit** to begin.



Step 2: Select Visit Date, Cycle of Care, Visit Type and Click Register.

A screenshot of a dialog box titled 'Cycle of Care Visit'. The dialog has a blue header with the title. Below the header, there are three dropdown menus: 'Visit Date' with the value '31/03/2021', 'Cycle of Care' with the value 'Diabetes', and 'Visit Type' with the value 'Annual Visit'. At the bottom right of the dialog, there are two buttons: 'Register...' and 'Cancel'. The 'Register...' button is highlighted with a blue dashed border.

Step 3: Enter your PCRS username and Password.

On the next screen, the PCRS Registration Date field will be populated if the patient is already registered with PCRS and if PCRS Certificate is on your machine. If it is not populated, then you can register the patient on the PCRS website by clicking the hyperlink 'Click Here'.

A screenshot of a dialog box titled 'Cycle of Care Registration Details'. The dialog has a blue header with the title. Below the header, there is a yellow message box that says: 'This patient must be registered on the PCRS website before recording the registration date here in Socrates. If you have not already registered the patient on PCRS [Click Here](#)'. The 'Click Here' link is highlighted with a red rectangular box.

When you return to Socrates click **Recheck** to populate the Registration date. Complete form and click OK.

Step 4: Populate the details on the form. All Mandatory fields are highlighted in yellow.


The screenshot shows a form for a Diabetes Annual Visit on 01/02/2017. The form is divided into two columns of fields. Mandatory fields are highlighted in yellow. The fields include:

- HbA1c (Mandatory)
- Total Cholesterol (Mandatory)
- LDL Cholesterol (Mandatory)
- Creatinine (Mandatory)
- ACR (Mandatory)
- Microalbuminuria (Mandatory)
- Foot Review (Mandatory)
- Foot Referral (Mandatory)
- Retinopathy Screening (Mandatory)
- Retinopathy Screening Referral (Mandatory)
- Weight (kg) (Mandatory)
- Height (cm) (Mandatory)
- BMI (Mandatory)
- Brief Intervention for Weight
- BP (Mandatory)
- Smoking (Mandatory)
- Alcohol (Mandatory)
- Exercise (Mandatory)
- Brief Intervention
- Review Treatment (Mandatory)
- Immunisation Offered (Mandatory)
- Patient Education Discussed (Mandatory)
- Cycle of Care Continued (Mandatory)
- Reason for Stopping
- Schedule Next Review (Mandatory)

At the bottom, there is a section for Education Links with a link for "Diabetes Retina Screen Reaistration" and buttons for Delete, Save, and Submit.

2.1. Lab Mapping

2.1.1. Create Lab Mapping

If the lab result is not automatically populated, click the ellipsis button  to search for a result to send with your visit. Enter e.g. Cholesterol in the Search field and click the **Search** button.

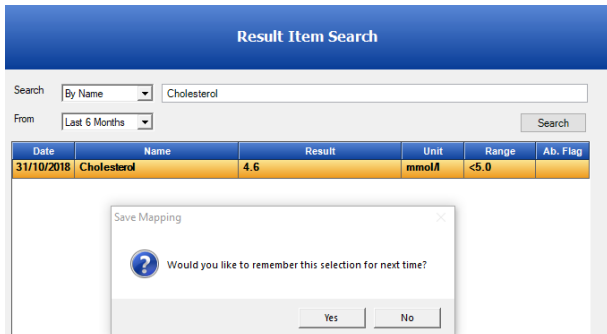
Select the **correct result** from the list and click the **Select** button.

The screenshot shows the "Result Item Search" dialog box. The search criteria are "By Name" and "Cholesterol". The search results table is as follows:

Date	Name	Result	Unit	Range	Ab. Flag
31/10/2018	Cholesterol	4.6	mmol/l	<5.0	

The "Select" button is highlighted with a red box.

You will receive a prompt to save this new mapping. Clicking Yes will add this mapping for future cycle of care visits for all patients.

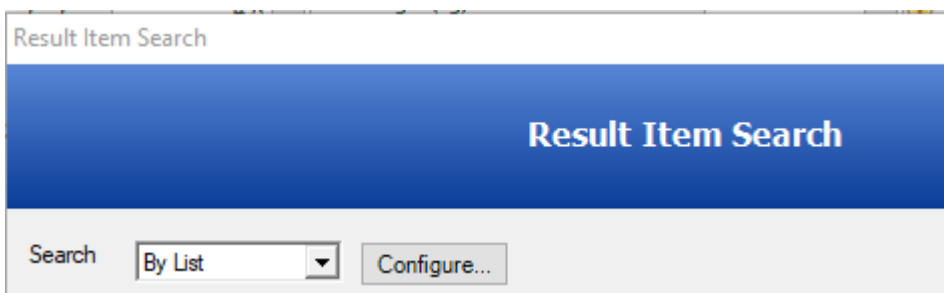



Click **Save** to save the fields that you have completed. You must complete all mandatory fields before the claim can be submitted.

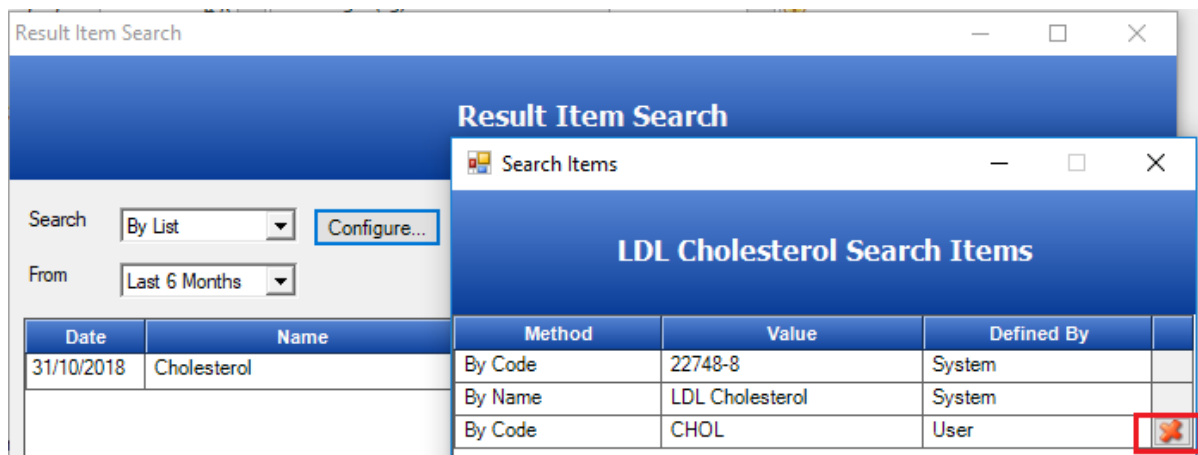
Click **Submit** to submit your claim to PCRS. PCRS validate the visit date against the PCRS Registration and the users GMS/DV card at that time. All valid claims will be sent and will have a status of 'Awaiting Ack'.

2.1.2. Remove Lab Mapping

If a lab result has been incorrectly mapped it can be removed by clicking the ellipsis button beside the Lab and then selecting 'By List' from the Search dropdown menu. Click Configure to view all mappings.



Clicking on the delete button  will remove the mapping for all future Cycle of Care Visits.

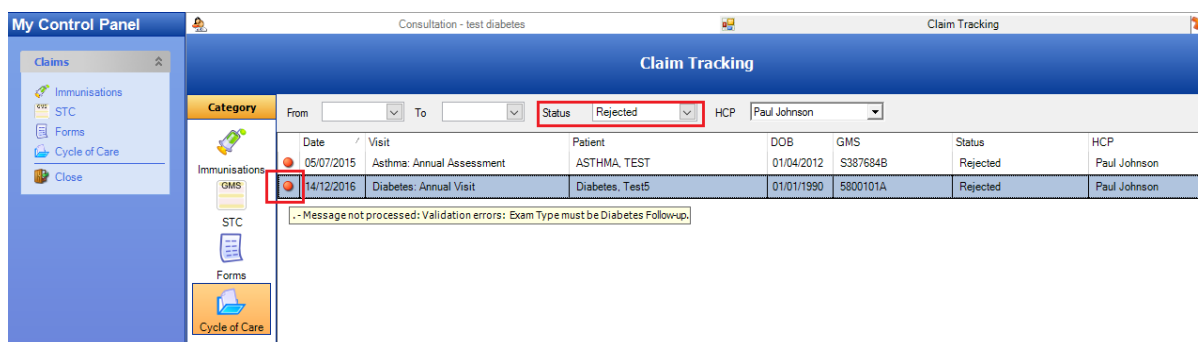


3. Message Responses

PCRS Cycle of Care messages are downloaded during the normal process of downloading lab messages. **Communication > Lab Messaging> Download Electronic Messages.** The updated claim status can be viewed from the patient’s chart and the Claim Tracker.

4. Control Panel > Claim Tracking > Cycle of Care

There are filters for Dates, Status and HCP. Hover over the status icon to view details of the claim e.g. view the reason for the rejected claim.



- Double click on the row to open the Consultation for the Patient selected.
- Select multiple Unsent claims and click **Submit**.
- If there is an issue with any of the claims these will remain in the Claim Tracker. Select each claim individually and click Submit to view the reason they failed to send.
- If any visits cannot be submitted then you can archive these claims by clicking the **Archive** button at the bottom right of the screen. You can view archived visits from the Status dropdown. These visits cannot be unarchived.

5. Appendix

5.1. Troubleshooting

Patient not on doctor's panel: open patient registration and check which GMS doctor & number is selected for the patient and compare this with the GMS doctor & number registered on PCRS website.

PID.8 error: Please check patient's gender in patient demographics to either male or female.

MSH.4 error: Check the MCN of the patients GMS doctor.

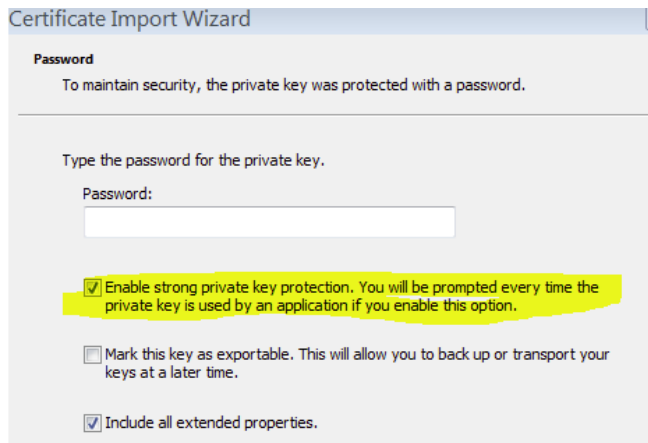
User cannot represent this GMS doctor number: Have you multiple usernames and passwords login to each doctors panel on the PCRS Application Suite? Request PCRS to provide one username and password to login to PCRS Application Suite. The issue here is the username and password saved in the database is for the incorrect doctors panel. **Contact Socrates Support** to allow you to enter this new username and password into Socrates if you do not get the prompt in the Cycle of Care section.

Could not initialize PCRS Consent Service: Check PCRS Certificate is valid and is selected in Edit > Preferences.

Windows Security Popup: If you are receiving this popup then you checked enable strong private key protection when installing the PCRS Certificate.



You can remove and re-install the PCRS Certificate and do not check this box. See screenshot.



5.2. Submitting Previous Recorded Visits

If you have been using the Socrates Diabetic Cycle of Care investigation &/or Socrates Asthma Cycle of Care investigation (unmodified) then you will have the option to Import these.

Step 1: Open patients chart and confirm Diabetic and Asthma Investigations are either **In Review or Complete**.

Step 2: Care Protocols > Cycle of Care. Click **Import**.



5.3. Reporting

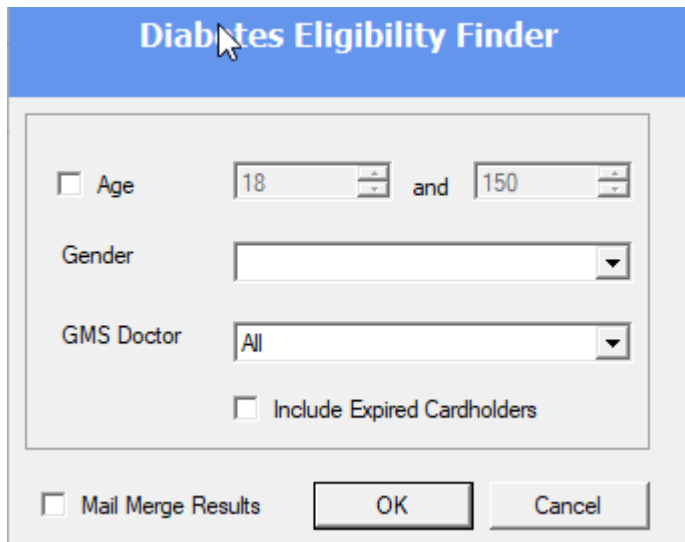
There are numerous Cycle of Care reports which you can use.

Category	Name
Cycle of Care	Asthma Eligibility Finder
Cycle of Care	Periodic Assessment Eligibility Finder
Cycle of Care	Diabetes Eligibility Finder
Cycle of Care	Cycle of Care Visit Status
Cycle of Care	Cycle of Care Claims between Dates

5.3.1. Find Eligible Patients

Reports > Cycle of Care. Run Asthma Eligibility Finder, Periodic Assessment Eligibility Finder and Diabetes Eligibility Finder.

For Diabetes Finder ensure you use the age filter to remove any patients that should be on CDM.



The screenshot shows a dialog box titled "Diabetes Eligibility Finder". It contains the following fields and options:

- Age: 18 and 150 (with spinners for each number)
- Gender: [Dropdown menu]
- GMS Doctor: All [Dropdown menu]
- Include Expired Cardholders
- Mail Merge Results
- OK button
- Cancel button