



Socrates GP Departmental Support

Quick Guide

February 2017

Contents

Create Departments.....	2
Appointment Types	3
Account Types	5
Department Preferences	6
Appointments.....	7
Accounts	8
Add Charge	8
Add Payment.....	9
Departmental Reports	10


Department Summary

Department support in Socrates allows you to logically separate your Appointments and Accounts by department.

- Appointment Types are linked to departments
- Account Types e.g. Charges and payments are linked to departments
- Preference to set your default department
- Preference to filter the waiting room by department

Create Departments

1. Select My Control Panel > Admin Console > Practice.
2. Select the main practice from the **Healthcare Centres** dropdown list.


Practice Details

Practice Details

Healthcare Centres:

Name: <input type="text" value="Wilson Practice"/>	Address 1: <input type="text" value="Protek House"/>
Unique Practice ID: <input type="text" value="4273237"/>	Address 2: <input type="text" value="Finisklin Business Park"/>
Telephone No.: <input type="text" value="0719193600"/>	Address 3: <input type="text" value="Sligo"/>
Fax No.: <input type="text" value="0719160388"/>	Address 4: <input type="text"/>
Email: <input type="text" value="info@socrates.ie"/>	PCT Code: <input type="text"/>
Heartwatch No.: <input type="text"/>	PCT Name: <input type="text"/>

Main Health Centre Active:

Departments

Name	Tel
▶ Main Department	0719193650

Department:

Telephone Number: Active

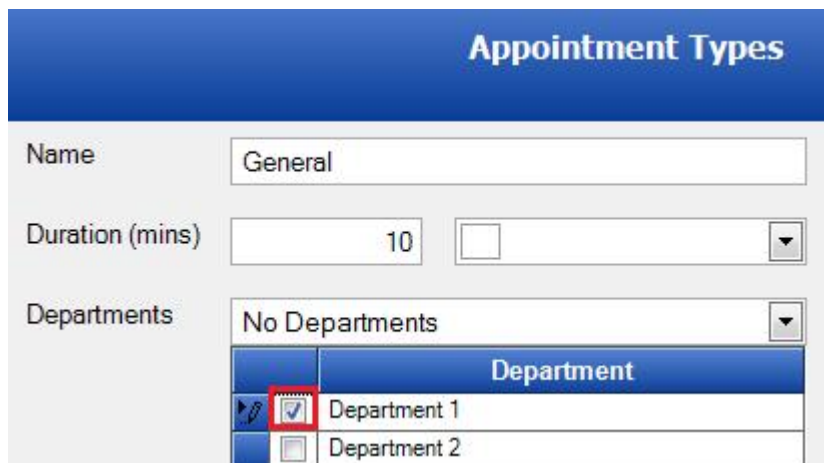
1. Enter the Department name & phone number and click **Save**.
2. Click **Save** on the Practice form to record all changes.

Note: The selected active practice must be set as the Main Health Centre.

Appointment Types

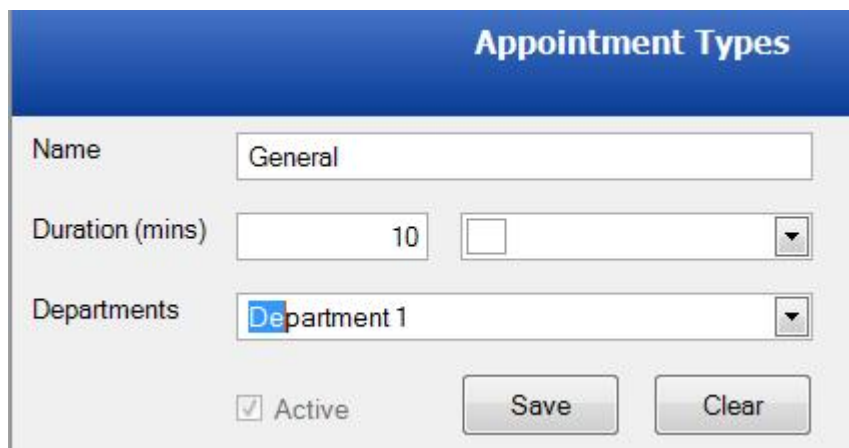
You must select which Appointment Types belong to each department created. Open the appointment types from Control Panel > Admin Console > Appointments.

1. In Appointment Types, enter the appointment type, choose the duration, colour and check which departments you want to link this type to.



Appointment Types		
Name	General	
Duration (mins)	10	<input type="checkbox"/>
Departments	No Departments	
	<input checked="" type="checkbox"/>	Department 1
	<input type="checkbox"/>	Department 2

2. Once you have selected all the departments you want click **Save**.



Appointment Types		
Name	General	
Duration (mins)	10	<input type="checkbox"/>
Departments	Department 1	
	<input checked="" type="checkbox"/>	Active
	<input type="button" value="Save"/> <input type="button" value="Clear"/>	

Note: Click inside the department box and it will refresh with the selected list of departments.

- To remove an Appointment Type from a department, select the appointment type from the Grid and click the dropdown list of departments.

Appointment Types

Name

Duration (mins) 255, 215, 0 ▼

Departments ▼

Active

⬆ Move Up ⬇ Move Down ⦿ Show Inactive

	Name	Duration
▶	General	15
▶	Follow-Up	15

- Uncheck the department you wish to remove and click **Update** to save your changes.

Appointment Types

Name

Duration (mins) 255, 215, 0 ▼

Departments ▼

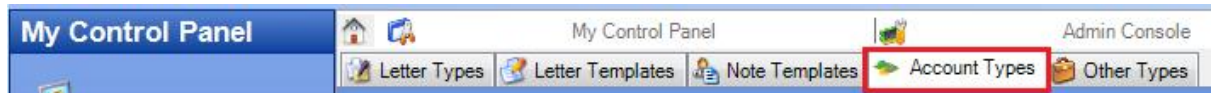
Active

Note: Click inside the department box and it will refresh with the selected list of departments.

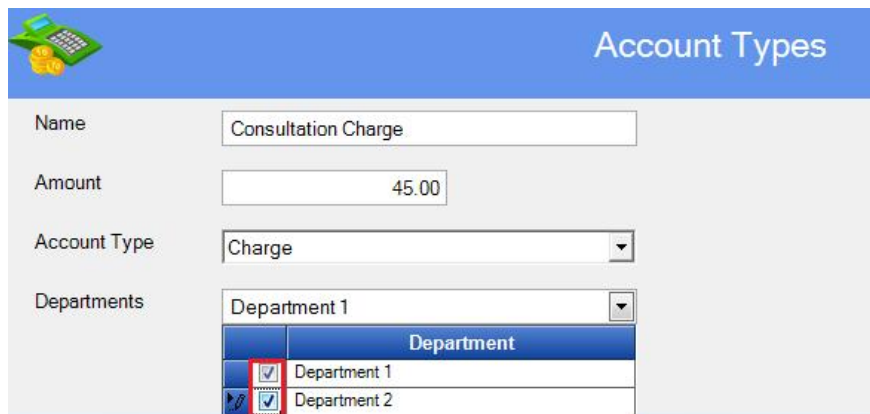
Account Types

You must select which Account Types belong to each department created. Open the account types from Control Panel > Admin Console > System Types.

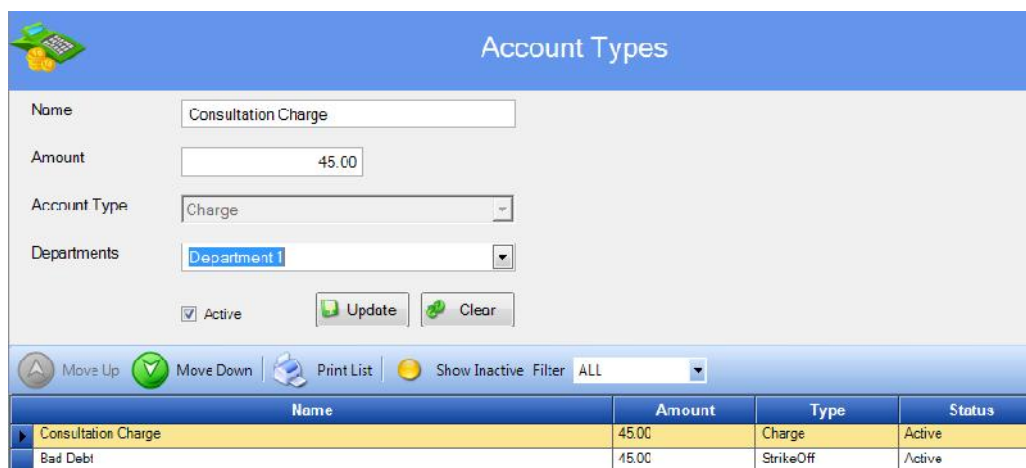
1. Select the **Account Types** tab.



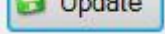
2. To create a new Account Type, enter the Name e.g. Consultation Charge, the amount and select the Account Type from the dropdown list e.g. Charge.
3. Check which departments you want to link to this Account Type and click the Departments dropdown list to Refresh. Click **Save**.



4. To edit the departments selected for an existing account type select the Account Type from the Grid.



Name	Amount	Type	Status
Consultation Charge	45.00	Charge	Active
Bad Debt	45.00	StrikeOff	Active

5. Select the departments required from the dropdown list and click Update  to save your changes.

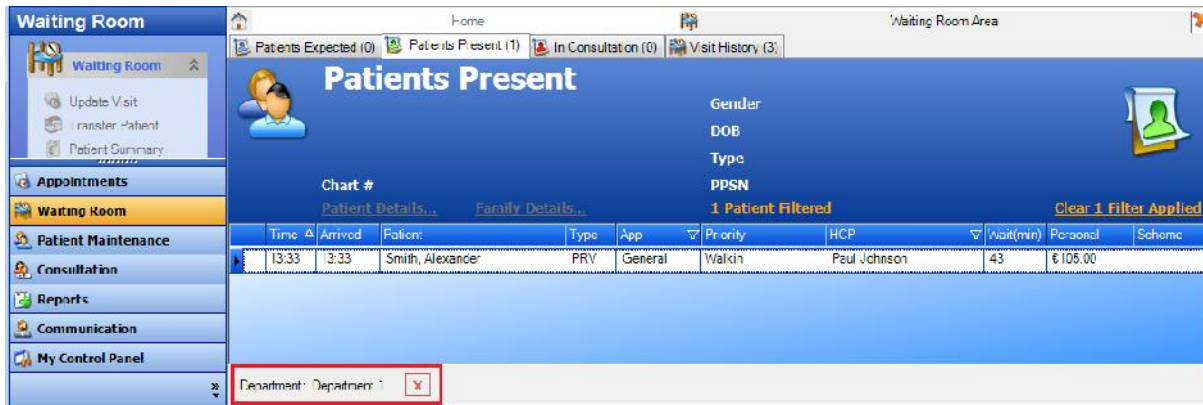
Department Preferences

You can specify a default department in Edit > Preferences by selecting the Departments tab from General.



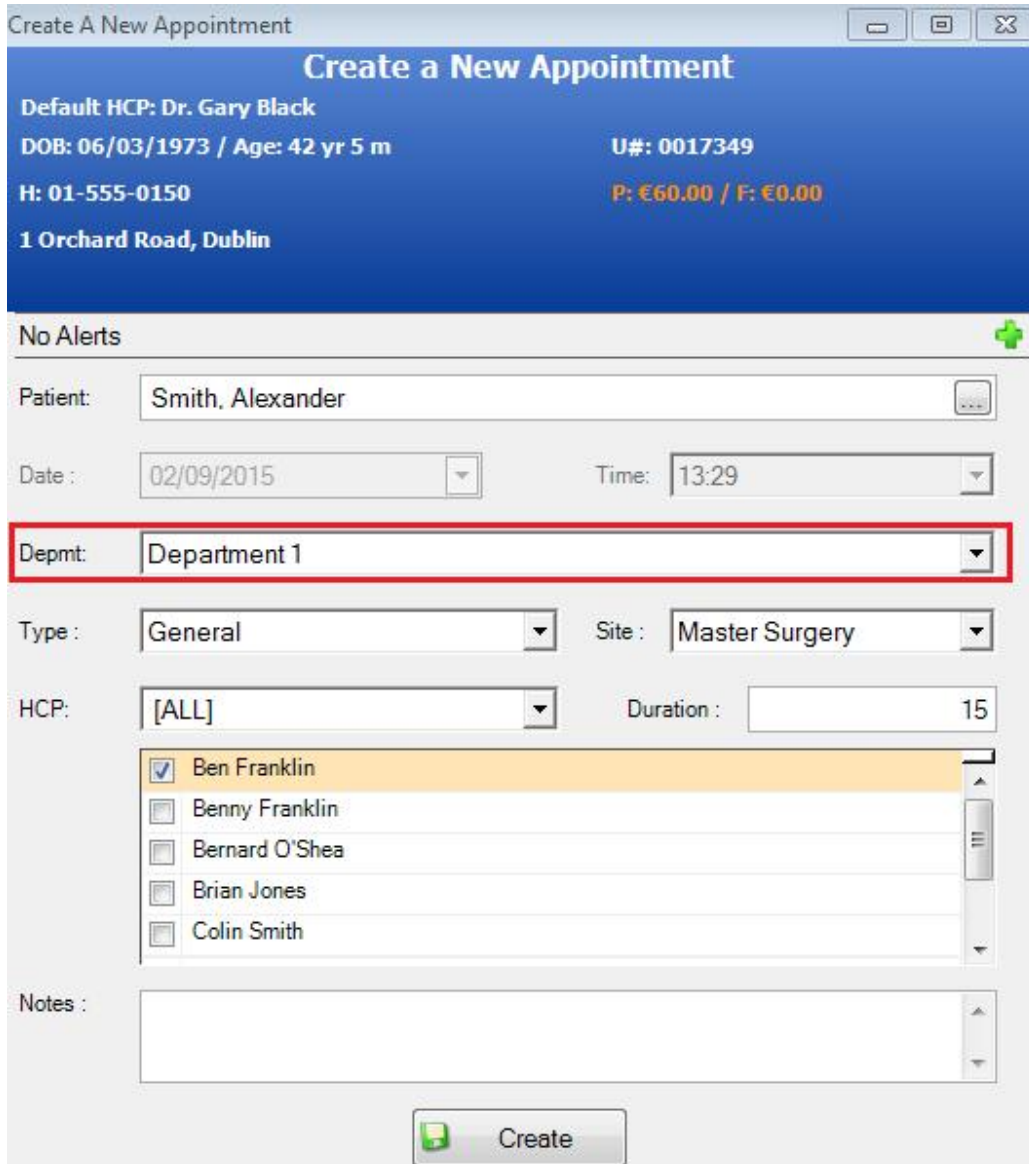
When the **Default Department** is set, whenever you create an appointment, charge or payment it will default to this department.

Filter Waiting Room by Department will automatically filter the waiting room when to the Default Department selected.

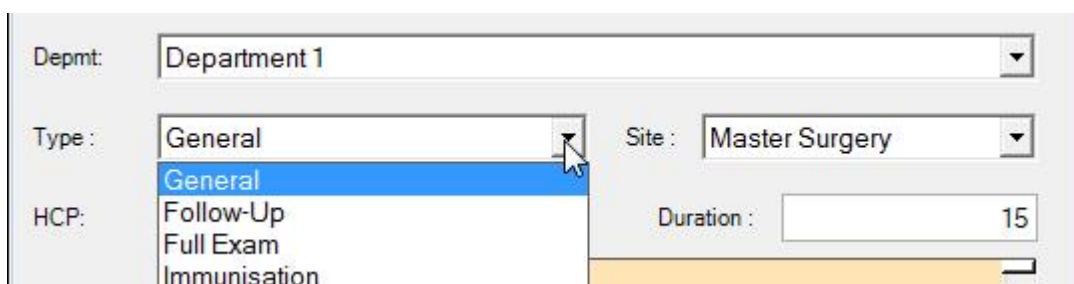


Appointments

When making an appointment or updating an appointment you specify which department the appointment belongs to.



When you select a department from the dropdown list, the list of Appointment Types automatically filters to the types linked to that department

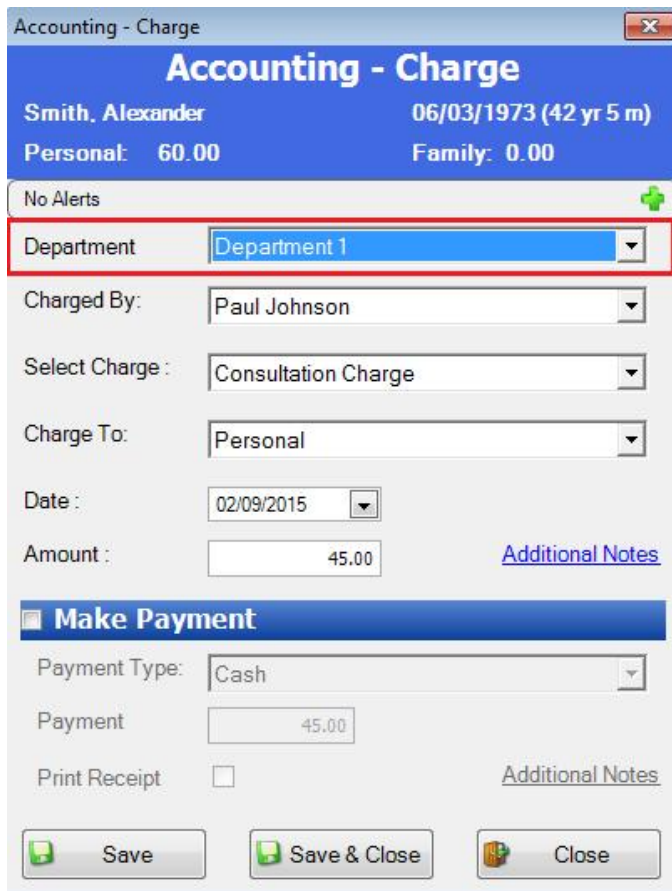


Accounts

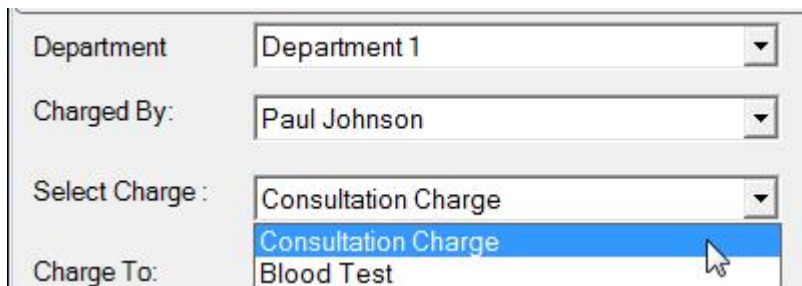
Add Charge

When charging a patient from the **waiting room** the Department will automatically default to the department the patient’s original appointment was for.

Note: If the charge is being made from within the patients account the Department dropdown list defaults to the department selected in Edit > Preferences > Departments.



The **Select Charge** dropdown list will filter to the charge Account Types linked to the selected department.



Add Payment

When recording a payment, you must specify which Department to allocate the payment to. The Department must be specified manually when recording a payment as it can be associated against multiple charges.

Depending on the department selected, the Payment types will filter to the ones associated with that department.

Accounting - Payment
✕

Accounting - Payment

Smith, Alexander
06/03/1973 (42 yr 5 m)

Personal: 105.00
Family: 0.00

No Alerts +

Payment Details

Department: Department 1

HCP: Paul Johnson

Payment Type: Cash

Payment To: Personal

Payment Date: 02/09/2015

Amount: 45.00

Print Receipt [Additional Notes](#)

Unallocated Charges

	Pay	Date	Description	Amount
▶	<input type="checkbox"/>	13/08/2015	Blood Test	£15.00
	<input type="checkbox"/>	28/08/2015	Consultation Charge	£45.00
	<input checked="" type="checkbox"/>	02/09/2015	Consultation Charge	£45.00

✔ Make Payment
Close

Departmental Reports

A new category in Reports is available for running reports based on departmental data.

Standard Reports		Standard Reports	Custom Reports
Name		Description	
Appointments By Department		Lists Attendance By Department Including Appointment Type and Status	
Transactions By Department		Lists Transactions By Department Including Account Type Type and Transaction Date Range	
Referrals By Department		Lists Appointments Grouped by Referral and Department	
Departmental		Provides Reports by Department	