

# socrates

## Socrates GP v2.7.7 Update User Manual March 2021

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### Socrates Message

*This update manual documents the updates that have been made to Socrates GP in release version 2.7.7. This release includes electronic Vaccinations, recording rejected vaccinations and general system enhancements.*

*We hope you continue to enjoy using our product and we look forward to receiving your feedback.*

*Email: [support@clanwilliamhealth.com](mailto:support@clanwilliamhealth.com)*

*Regards*

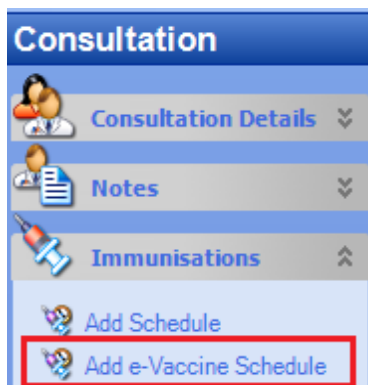
**Socrates Team, Clanwilliam Health**

## Consultation

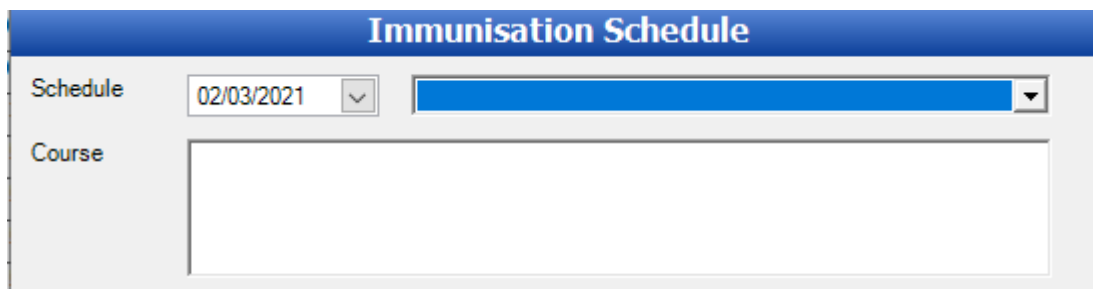
### Immunisations

#### Send electronic Immunisation

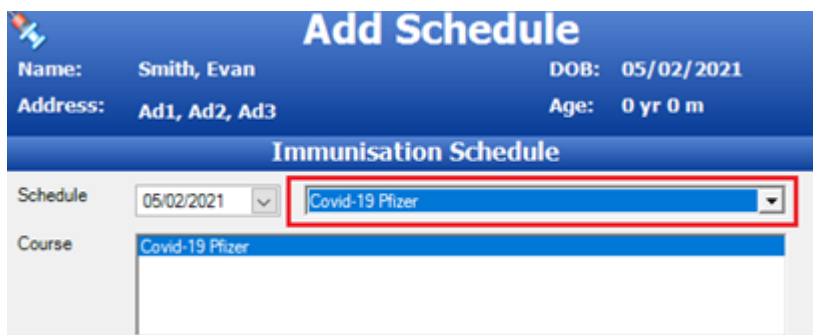
In the patients' chart (after beginning a consultation) select Immunisations and click the new Quick Add button, **Add e-Vaccine Schedule**.



Select the Covid Schedule you are administering from the dropdown list



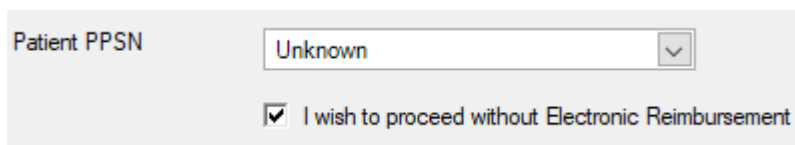
Ensure you select the correct date for the Schedule and select the correct vaccine from the dropdown list e.g. Covid-19 Pfizer.



Additional information is required for Electronic Submissions and this must be completed before you can add the details of the shot administered.

- Select the checkbox to confirm the patient is eligible for the vaccine and select Patient Consent. You can only proceed with the Covid Vaccination if the Patient Consent is Yes or Best Interest.
- Select the correct Allocation Group from the dropdown list.
- **The Responsible HCP will be the doctor whose name, PCRS Contract Number and Medical Council Number is sent in the Electronic Submission via Healthlink. *Ensure this doctor is registered with Healthlink on your Healthlink Practice Cert.***
- If the PCRS Contract Number field is empty you can populate it on this form and it will save the number for this doctor for future electronic submissions.
- Either patient mobile number or email address are mandatory fields. If saved in patient registration they will prepopulate on the form. The International code must be entered for all mobiles e.g. (+353) or (+44). *If patient does not have a mobile or email request them to provide you with a next of kin's number that can be used.*
- **Ensure you enter Patients correct PPSN number.** The patients PPSN is required for payment.

Should the Patients PPSN not be available select Unknown from the dropdown list and confirm you wish to proceed without Electronic Reimbursement. This claim will be rejected from PCERS if you choose to submit it.



The screenshot shows a form field labeled "Patient PPSN". The dropdown menu is open, showing "Unknown" as the selected option. Below the dropdown, there is a checkbox that is checked, with the text "I wish to proceed without Electronic Reimbursement" next to it.

Once you have entered all the details of the vaccine administered, you can save this electronic submission as Incomplete. You can send this electronic submission once you have obtained the patients correct PPSN.

Click **Next** to continue to the Administer Shot window.

**Add Schedule**

Name: Test, ATC4 DOB: 01/01/1960  
Address: 1, 2 Age: 61 yr 1 m

**Immunisation Schedule**

Schedule: 05/02/2021 Covid-19 Pfizer  
Course: Covid-19 Pfizer

**Administer First Shot**

Patient Is Eligible   
Patient Consent: Yes  
Allocation Group: None of the above (i.e. allocation grou  
Responsible Hcp: Paul Johnson  
Pcrs Contract Number: 53385  
Patient County: Dublin 1  
Ethnicity: White Irish  
Patient Mobile #: (+353) 870000000\_  
Patient Email:  
Patient PPSN: 6578945Q

Administered Elsewhere **Next** Close

Complete the mandatory fields on the Administer Shot window. Ensure you select the correct **Date Given** for the Shot and the correct expiry date i.e. the expiration date for the Vaccine that you have in your fridge.

**Add Schedule**

Name: Test, ATC4      DOB: 01/01/1960  
Address: 1, 2      Age: 61 yr 1 m

**Immunisation Schedule**

Schedule: 05/02/2021      Covid-19 Pfizer  
Course: Covid-19 Pfizer

**Administer First Shot**

Immunisation: Covid-19 Pfizer Shot 1      Method: IM  
Date Due: 05/02/2021      Dose: 0.3 ML  
HCP: Paul Johnson      Manufacturer: Pfizer  
Date Given: 05/02/2021      TradeName: Pfizer  
Batch No.: F34534647      Agent:   
Expiry Date: 30/04/2021      Comment: Vaccine Comment  
Site: Right Deltoid

Administered Elsewhere      < Back      **Save**      Close

Batch Number, Expiry and Drug will prepopulate in the dropdown lists if they have been added to **My Control Panel > Admin Console > Immunisations**. This is the recommended method for speed, to reduce errors and for Stock administration.

Otherwise, you can type the details directly onto the form each time you record the shot administered.

### **Comment**

Use the Comment field to record any additional information e.g. for Pfizer Vaccine - Saline Diluent Batch No and Expiry Date and Use by date / time.

Click **Save** to submit the shot electronically via Healthlink using the **Healthlink Certificate** in your user profile. The vaccination details are sent in a message to the HSE and the electronic claim is sent to PCRS.

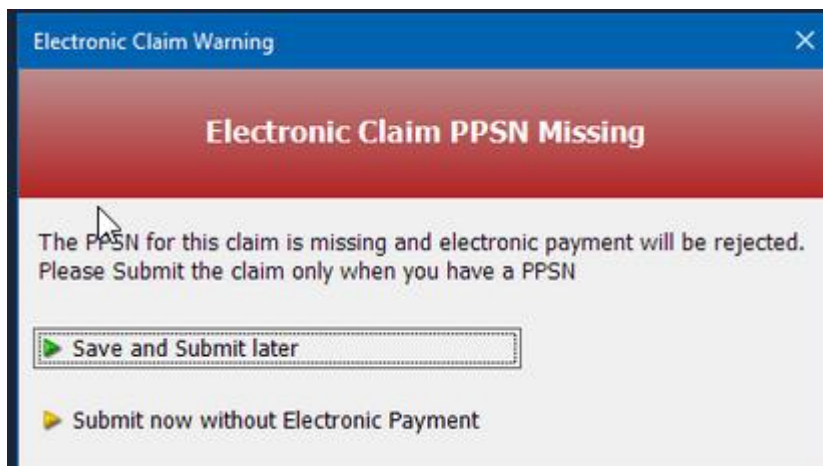
Hover over the Electronic flag in the Immunisations section to view the PCRS Claim Status.



Immunisations			
	Due <sup>Δ</sup>	Given	
	05/02/2021	05/02/2021	Covid-19 Pfizer Shot 1
	05/03/2021		Covid-19 Pfizer Shot 2

Electronic Claim Accepted

If you do not have the patients PPSN then you will receive the following message. We recommend that you Save the claim and submit it later when you have the patients correct PPSN.



These claims will be saved as Incomplete and can be resubmitted once you have the patients correct PPSN.

### First Shot Administered Elsewhere

Should the patient have received the first shot elsewhere then tick 'Administered Elsewhere'.

The screenshot shows the 'Administer First Shot' form with the following fields: Immunisation (Covid-19 AstraZeneca Shot), Method (IM), Date Due (10/02/2021), Dose (0.5 ML), HCP (Paul Johnson), Manufacturer, Date Given (10/02/2021), TradeName, Batch No., Agent, Expiry Date, Comment, and Site. The 'Administered Elsewhere' checkbox at the bottom left is highlighted with a red box.

This will move you to the Administer Shot window where you can click **Save**. *You do not need to complete any details of the Consent / Shot. There will be no electronic submission for shots administered elsewhere.*

The screenshot shows the 'Administer First Shot' form with the same fields as above. The 'Administered Elsewhere' checkbox is now checked and highlighted with a red box. The 'Save' button at the bottom right is also highlighted with a red box.

Double click on the second shot from the Immunisation list to administer it in the usual manner.

Schedules		Immunisations				
Schedules		Due	Given	Shot	Batch	Administered By
Covid-19 Pfizer		01/01/2021	09/02/2021	Covid-19 Pfizer Shot 1		Adm. Elsewhere
		09/03/2021		Covid-19 Pfizer Shot 2		

### Submission Errors

#### MSH.4 error when submitting the Claim.

This is a Healthlink error. Check the **Medical Council Number** of the doctor entered in the Responsible HCP dropdown list. Confirm the HCP is registered with your Healthlink Practice Certificate (and you have the correct Practice Certificate on your machine).

**Administer First Shot**

Patient Is Eligible

Patient Consent

Allocation Group

**Responsible Hcp**

### Message Responses

Responses are downloaded during the normal process of downloading lab messages.

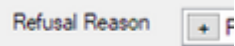
**Communication > Lab Messaging> Download Electronic Messages.** The updated PCRS claim status can be viewed from the patient’s chart and the Claim Tracker.

### Reject Shot

You can now record that a patient rejected a shot due by selecting the shot and pressing the Reject button.

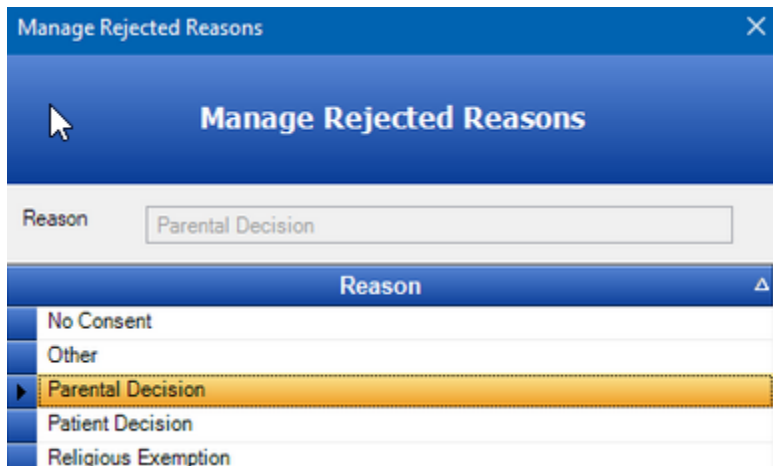
12/01/2019	Influenza		
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Select a refusal reason from the dropdown list of predefined reasons and click **Save**. Alternatively, you can press the + button beside Refusal Reason  to add a new rejection reason to the list.



You cannot delete the system defined rejection reasons but you can delete any user defined shots added in error.

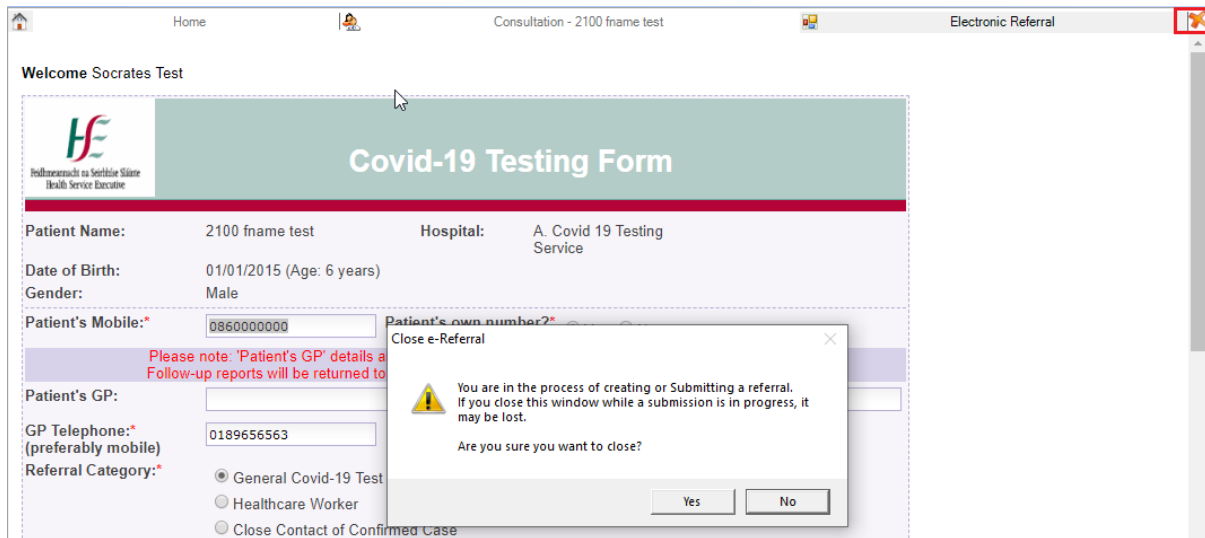


Rejected Shots can be deleted from the patients chart by double clicking on the rejected shot in the Rejected list and selecting Delete. **Note:** The shot is deleted. It does not appear back in the Due list.

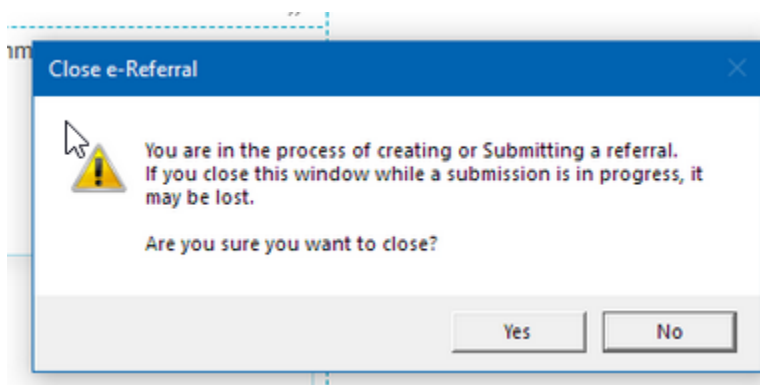
## Healthlink Hospital Referrals

After sending an electronic referral where the Healthlink form is used e.g. Covid Referral, Ophthalmology, Pigmented Lesion or endoscopy you should let the referral details save back into Socrates.

If you click X to close the window before the information is saved into Socrates you will get this prompt.




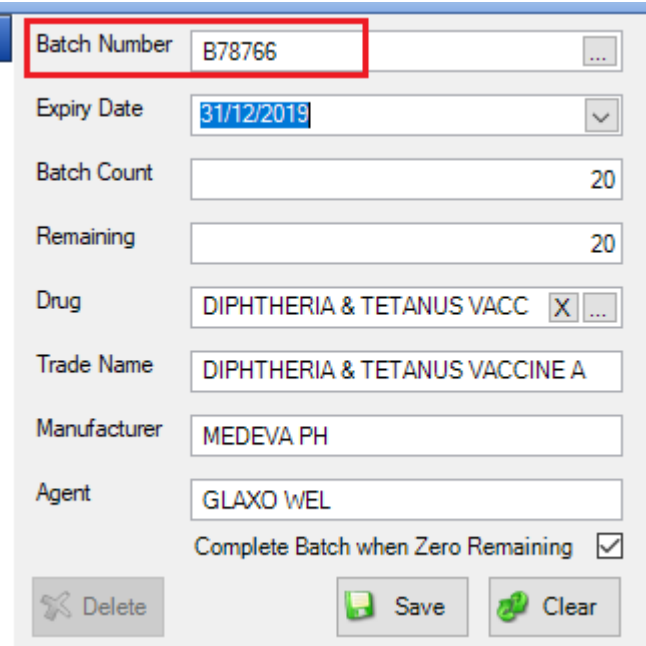
You should click **No** and allow Socrates to retrieve the details from Healthlink unless you are actually cancelling this healthlink referral.



## Control Panel

### Admin Console > Immunisations

When adding in a batch number if you use the **tab key**  to move to the next field the Batch details will populate if a Batch Number is found.



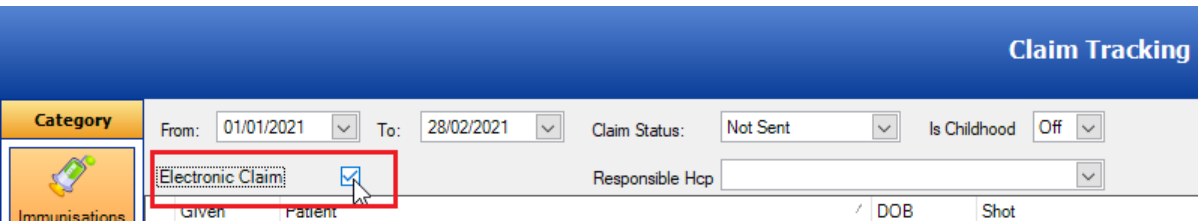
The screenshot shows a form with the following fields and values:

- Batch Number: B78766
- Expiry Date: 31/12/2019
- Batch Count: 20
- Remaining: 20
- Drug: DIPHTHERIA & TETANUS VACC
- Trade Name: DIPHTHERIA & TETANUS VACCINE A
- Manufacturer: MEDEVA PH
- Agent: GLAXO WEL
- Complete Batch when Zero Remaining:

Buttons at the bottom: Delete, Save, Clear.

### Claim Tracking > Immunisations

To view any electronic Immunisations, select **Immunisations** and select the Electronic Claim checkbox.




The screenshot shows the Claim Tracking interface with the following filters and options:

- Category: Immunisations
- From: 01/01/2021
- To: 28/02/2021
- Claim Status: Not Sent
- Is Childhood: Off
- Electronic Claim:
- Responsible Hcp: [Empty]

Buttons: Given, Patient, /, DOB, Shot.

To search the grid select any row in the list and start typing example, search by PPSN or Claim ID.



The screenshot shows a search bar with the text "x | 2" and "7 Matches Found" on the right.

Filter by claim Status to find all Incomplete, Unsent, Accepted or Rejected claims.

## Incomplete Messages

To amend an incomplete claim, filter by Claim Status of Incomplete. Double click on the Immunisation in the list and update it.

Click the Back button. Enter the PPSN, click Next. Click Save to resubmit the incomplete claim.

## Rejected Messages

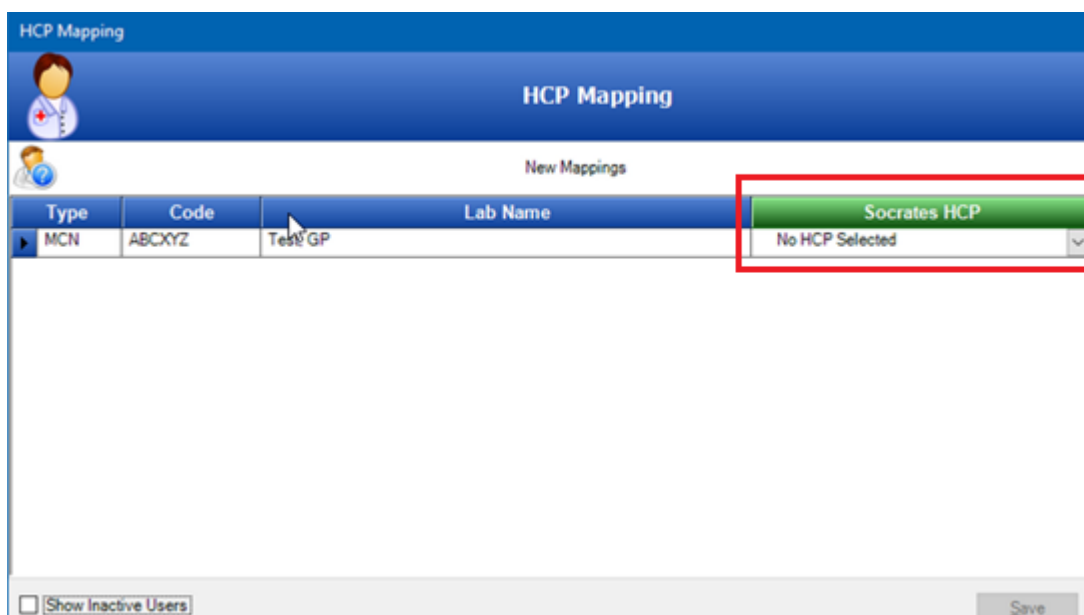
To amend a rejected claim double click on the Immunisation in the list and update it. To update the patients PPSN, click Back button. Enter the PPSN, click Next and click Save to resubmit the rejected PCRS claim.

## Communication > Lab Messaging

### Download Electronic Messages

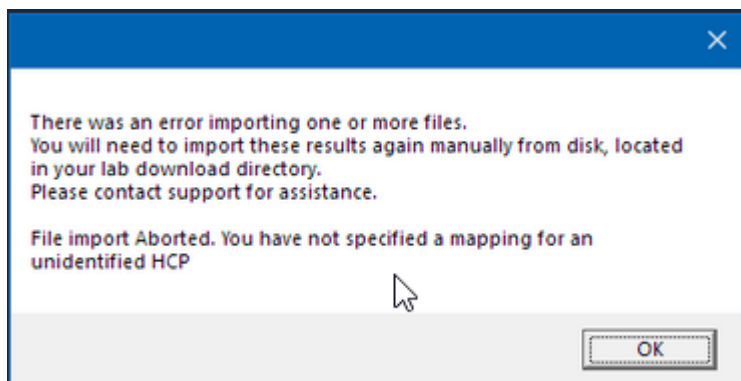
After clicking on Download Electronic Messages, Socrates will check Healthlink for unprocessed messages and download them to the specified folder usually C:\Labs. It will then attempt to import the downloaded file into Socrates. Socrates will match up the HL7 message to a user in Socrates.

If the HCP Mapping window appears then you need to select a Socrates HCP from the dropdown list to match this HL7 message to. A Socrates HCP must be selected here in order to import the HL7 message into Socrates.



Once the import has been successful and Archive Successful Imports is selected in Edit > Preferences > Investigations, the HL7 messages will be moved to the archive folder usually C:\Labs\Archive.

Should you receive the following message you need to contact Support to investigate why your HL7 responses failed to import into Socrates.



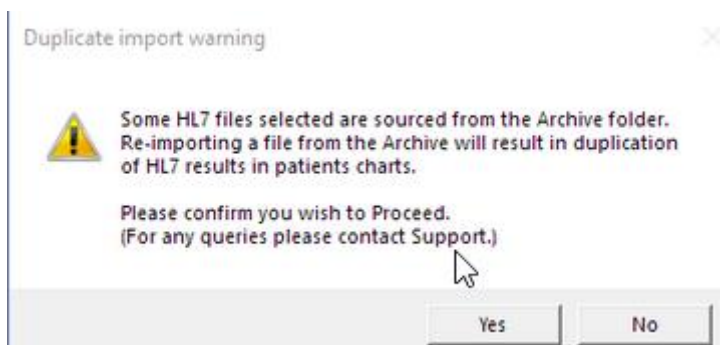
If your healthlink certificate has expired you will get this error message when trying to download electronic messages. 'The request failed with HTTP status 403: Forbidden'

Check your healthlink certificate expiry date by opening Internet Options > Content > Certificates and selecting your healthlink cert. Contact Healthlink to obtain a new certificate.

## Import HL7 Files from Local Disk

If you are importing HL7 messages manually you need to be careful as if you re-import the same file twice there will be duplication in the patients' charts in Socrates.

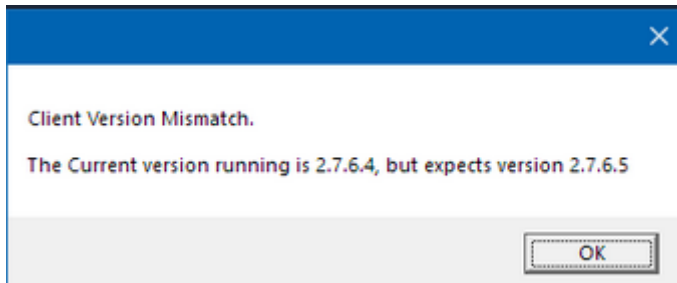
HL7 messages in the 'Archive' folder have already been processed by Socrates and there is no need to re-import them again. A warning will appear if you try to re-import a file from the Archive folder. You should click **No**.



## Socrates Client Upgrades

When Socrates is upgraded at your practice, the Socrates database is updated and then each Socrates Client (on each machine) must be updated to reflect the changes made in the latest version and database changes.

- If your Socrates client does not upgrade automatically then you will no longer be able to login to Socrates. You will receive this error message. Please call Socrates Support to fix this issue.



- If you are logged into Socrates when a new Socrates version is downloaded then you will receive a message advising that there is a new update downloaded.
  - If you have charts etc open that you need to save then select 'Remind me in 5 minutes'. **Save all charts and log out and back into Socrates to upgrade your Socrates client.**

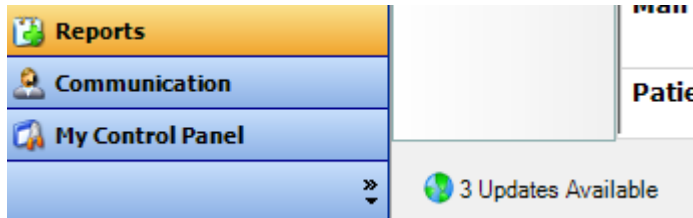


- If you have no work that needs to be saved select 'Restart Socrates Automatically'.
- You can only choose 'Remind me in 5 Minutes' once then you will be forced to restart Socrates Automatically.

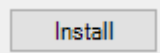


## Reports

It is important that you regularly check for Report Updates in Socrates. To do this open Reports and you will see any updates available at the bottom of the screen.



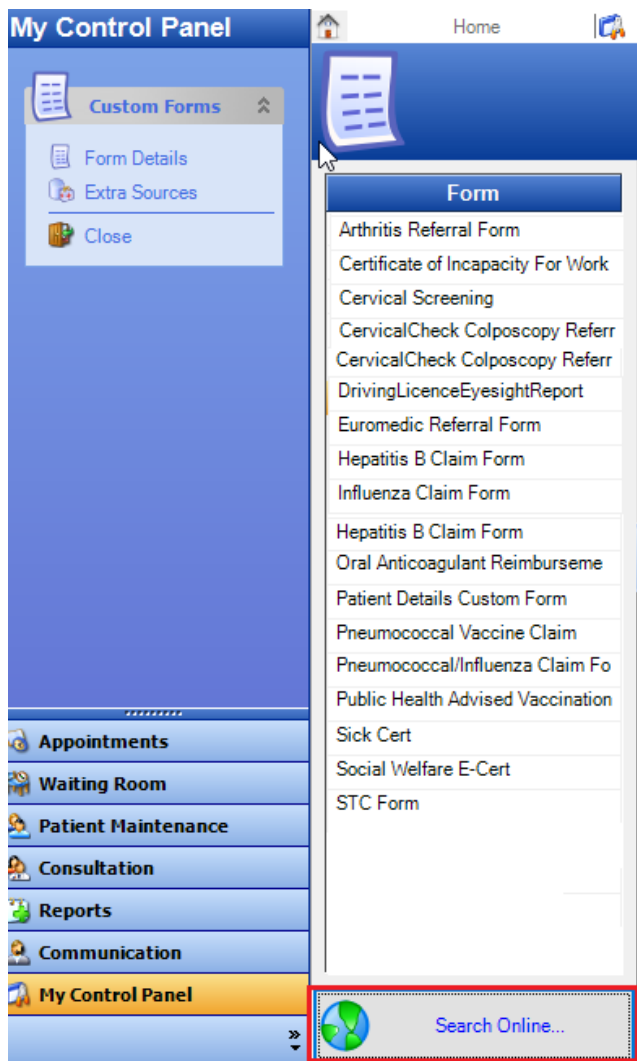
Click this button to open the list. Check all the reports by selecting the checkbox in the header and click Install.



- **New Reports**
  - Patients who refused an Immunisation Shot
  - Deleted Documents for Patient
  - Video Consultation users – Virtual Appointment Bookings between Dates
- **Updates made to the following reports:**
  - Patients Not Scheduled Shot X
  - Patients who have not been Given Shot X Between Dates
  - Duplicate Patient Name
  - Duplicate GMS Patients
  - Patients with Allergies
  - Pregnant Women Report
  - Flu Finder
  - Patients who received Batch X
  - Patients who do not have specific investigation between dates
  - Patient SMS Consent Status
  - HCP Reminders for Patients
  - GMS Visits
  - Disease Survey

## Forms

It is important to regularly check for Form Updates. Open My Control Panel > Admin Console > Custom Forms and click **'Search Online'**.





Select any form you wish to download and click **Install** or **Update**.

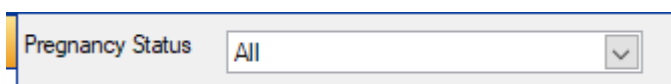
A new **Cervical Screening** form (V16) and **CervicalCheck Colposcopy Referral (V11)** have been added recently.



Any future updates to these forms will be available in Online Forms.

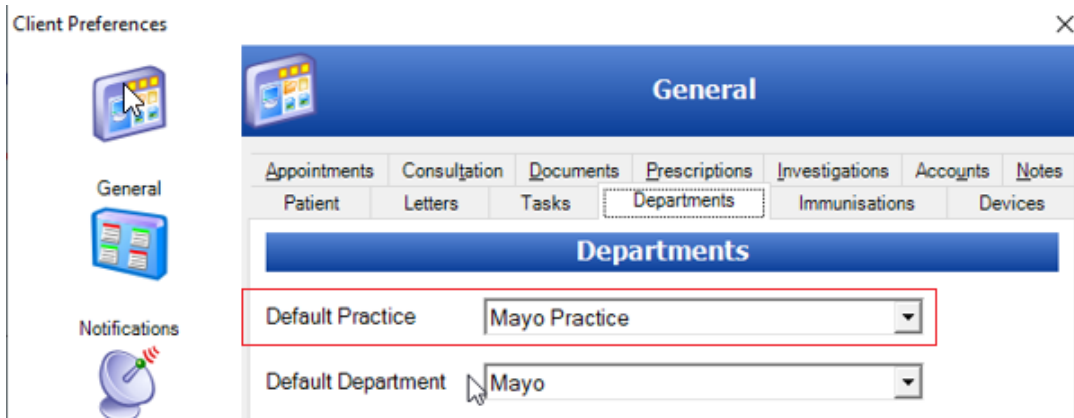
## Bugs / Tasks

- **MSC Claims Tracker** - Pregnancy Status dropdown is now loading All MSC Claims when All is selected.



- **CDM**
  - Improvements made to enhance the lookup when trying to populate the CDM protocol with data from patients chart.
  - Each unsent CDM review is now checked before submission to verify the assigned GMS Doctor for that review has a GMS Number in their user profile.
- **Standard Scripts** - Scripts dropdown list updated to allow for users to type additional characters e.g. 'Te' instead of jumping to T and then to E. User must enter the characters within 1 second e.g. 'Te' and then it will jump to script beginning with letters 'Te'.
- **Healthlink** – dropdown list added to Edit > Preferences to choose your default Healthlink Certificate if you have more than 1 cert on your machine.

- **Departments** – For any practice using Departments you can now select your default Practice. This will place the correct address on your healthlink referral, prescription, letters and reports.



- **Practice** Save Practice button has been added to the left hand side menu item for ease of use. If you use Departments the Save button has been relabelled to Add / Update.

