

# socrates

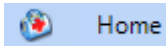
## Socrates GP v2.8.1.3 Update User Manual October 2021

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### Socrates Message

*This manual documents the updates from release version 2.8.0.1 to 2.8.1.3. All training materials i.e. Quick Guides, FAQ's, Videos and Webinars are available on the **Socrates Home** page or from the Help menu in Socrates > Online Help.*



*If you have any change request e.g. report modifications or new features / enhancements to existing features please email the details of the request to: [cr@clanwilliamhealth.com](mailto:cr@clanwilliamhealth.com). For all other queries please email: [support@clanwilliamhealth.com](mailto:support@clanwilliamhealth.com).*

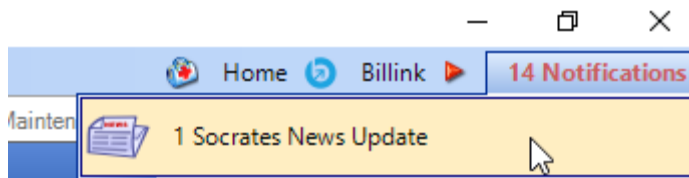
*We hope you continue to enjoy using our product and we look forward to receiving your feedback.*

*Regards*

**Socrates Team, Clanwilliam Health**

## 1 Notifications

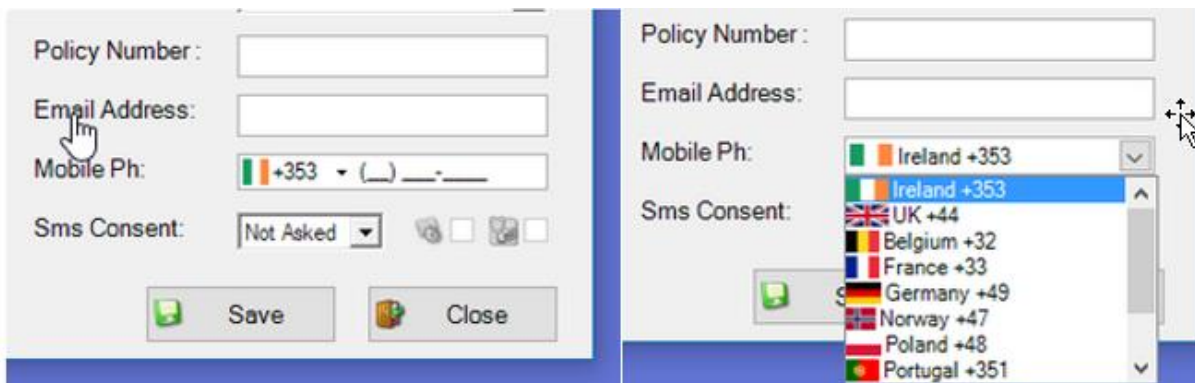
Open Socrates News Update in **Notifications** to view all important notifications that we send to you.



## 2 Patient Maintenance

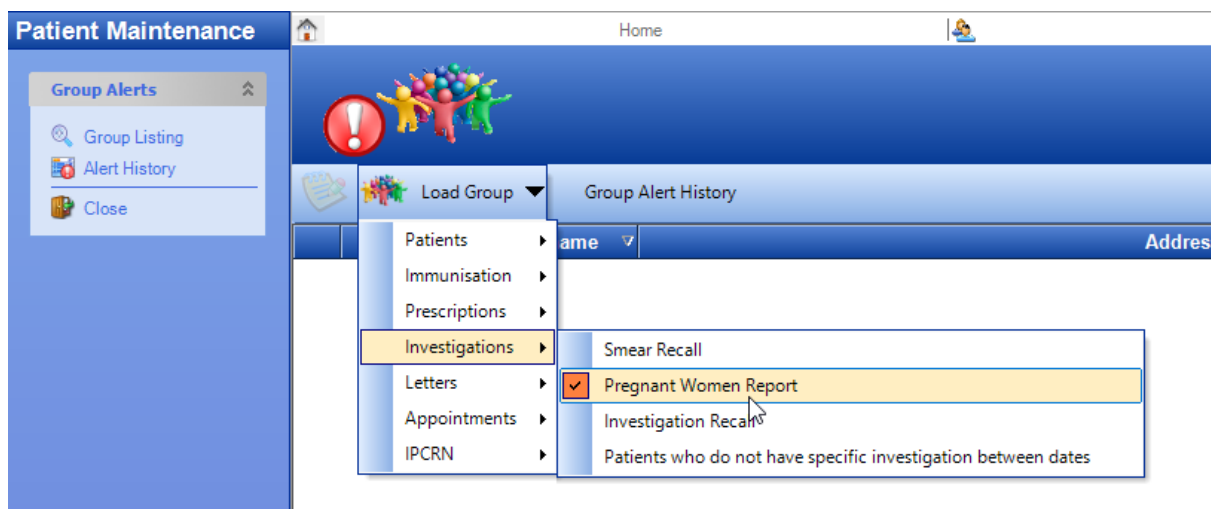
### Patient Registration

International code added to mobile number field.



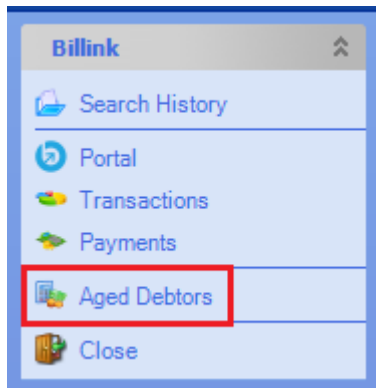
### Patient Group Alerts

Pregnant Women report added to Investigations group in Patient Group Alerts. Select **Load Group** and select Investigations > **Pregnant Women Report**. Ensure the updated report is downloaded from Reports Service or it will not appear in the dropdown list.

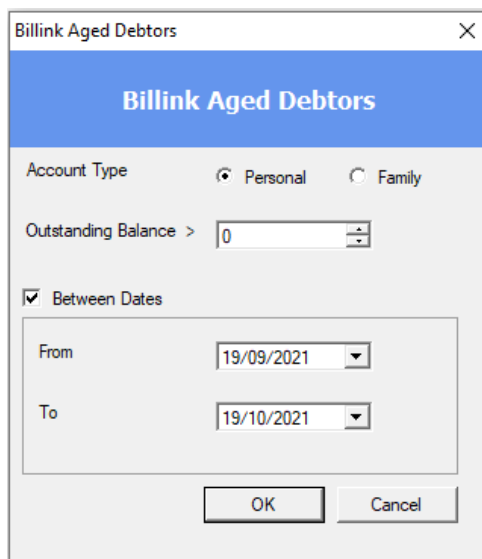


## 3 Accounts

Aged Debtors has been added to the Billink menu. You will see this menu in the Search History tab if you are registered for Billink.



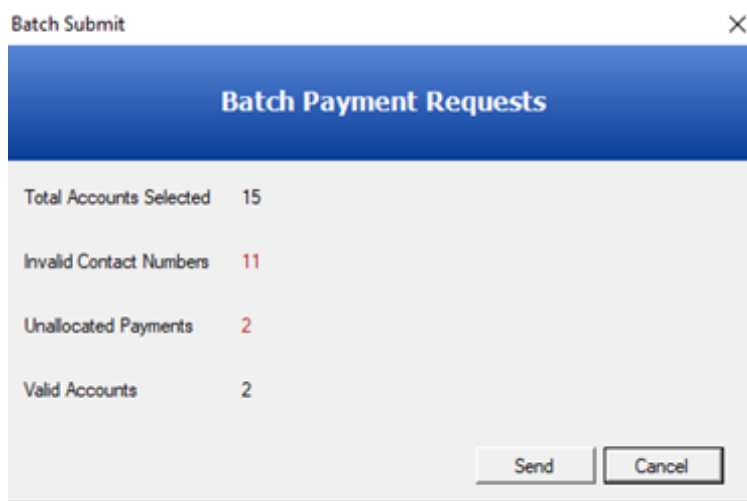
Click **Run** to open the Billink report and enter the criteria required. Click OK to generate a list of patients based on this criteria.

A screenshot of a dialog box titled 'Billink Aged Debtors'. The dialog has a blue header with the title. Below the header, there are several fields and controls: 'Account Type' with radio buttons for 'Personal' (selected) and 'Family'; 'Outstanding Balance >' with a text input field containing '0'; a checked checkbox for 'Between Dates'; and two date pickers labeled 'From' and 'To', with 'From' set to '19/09/2021' and 'To' set to '19/10/2021'. At the bottom, there are 'OK' and 'Cancel' buttons.

**Note:** If you select Personal, a list will be generated of all patients who have a personal balance based on the criteria selected for the report and who do not have any Billink payment requests with a status of Sent.

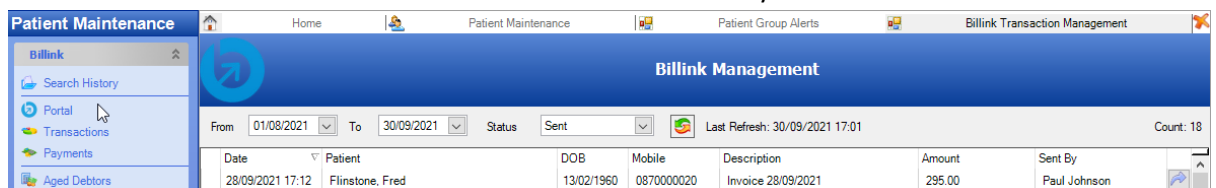
- Double click on a patient to open their Account to view their current outstanding balance and confirm their personal outstanding balance is correct.
  - If you use between dates to generate the list and the patient has since paid this outstanding charge then this patient will be skipped and no Billink payment request will be sent.
- Select 1 or more patients from the list and click **Batch Requests** to send Billink payment requests for the outstanding charge (as returned by the Aged Debtors report) for that patient.

- A Billink payment request will only be sent for Patients with :
  - a valid mobile number
  - no unallocated charges and
  - a current outstanding balance on their account.
- A notification will be displayed of those that cannot be sent a Billink payment request and the reason i.e. Patient has no mobile number or has unallocated payments on their account.
- Click **Send** and wait for requests to be sent and the window to close.
- View all Sent requests by opening Billink > Search History.
- Run the report with the same criteria again and update patients mobile number / allocate any unallocated payments to the corresponding invoice.



Other Billink updates are as follows:

- The Taken by user recording for the Billink online payment will be the user that sent the Billink Payment request.
- Time has been added to the Date field in Billink > Search History.



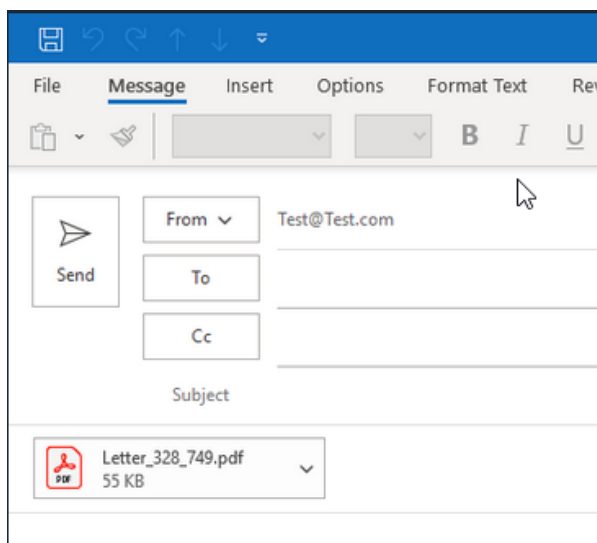
- Billink request is cancelled on Billink Portal when you click the Remove button for a Billink payment request in Billink > Search History
- If a patient has a Billink payment request and they pay the charge either over the phone or in person then you should select Payment Only from Waiting Room or Payment in Accounts and allocate it against the charge.
  - If you add a payment for this charge manually & allocate it to that Charge then a Settled message is sent to Billink and the payment status on Billink is Settled.
  - If a patient has 1 or more Billink payment requests outstanding and you add an unallocated charge or a charge of €0 and records a payment then a Settled

message is sent to Billink for all charges outstanding and the payment status on Billink is Settled for all transactions that were in Sent status for that patient.

## 4 Consultation

### Letters

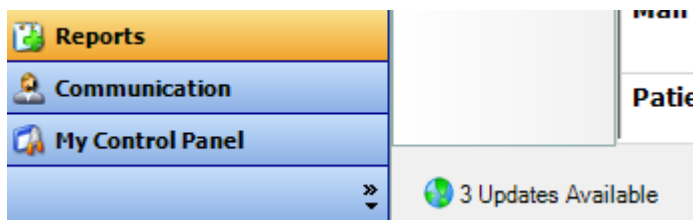
When emailing a letter from Socrates GP, the letter will be automatically converted to a PDF and attached to the new email window. If a letter cannot be converted, the original Word Document file will be attached instead.



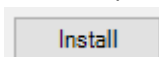
## 5 Reports / Forms

### Report Updates

It is important that you regularly check for Report updates and Form 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.



Available Reports				
<input checked="" type="checkbox"/>	Report	Published	Type	Status

- **Recent Report Updates:**
  - Pregnant Women Report (required for Bulk SMS & Patient Group Alerts)
  - Chronic Disease Management Claims between dates
  - Patient Care Plan
  - Investigation Recall – new filter added for easier searching on local Investigations

## Forms

For updated Forms, open Control Panel > Admin Console > **Custom Forms** and click **Search Online**.



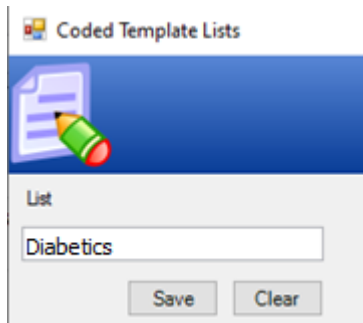
- **Recent Form Updates:**
  - FLUAD Influenza Vaccination Claim (over 65s)

## Coded Templates

You can now create Coded Templates which you will be able to use for reporting.

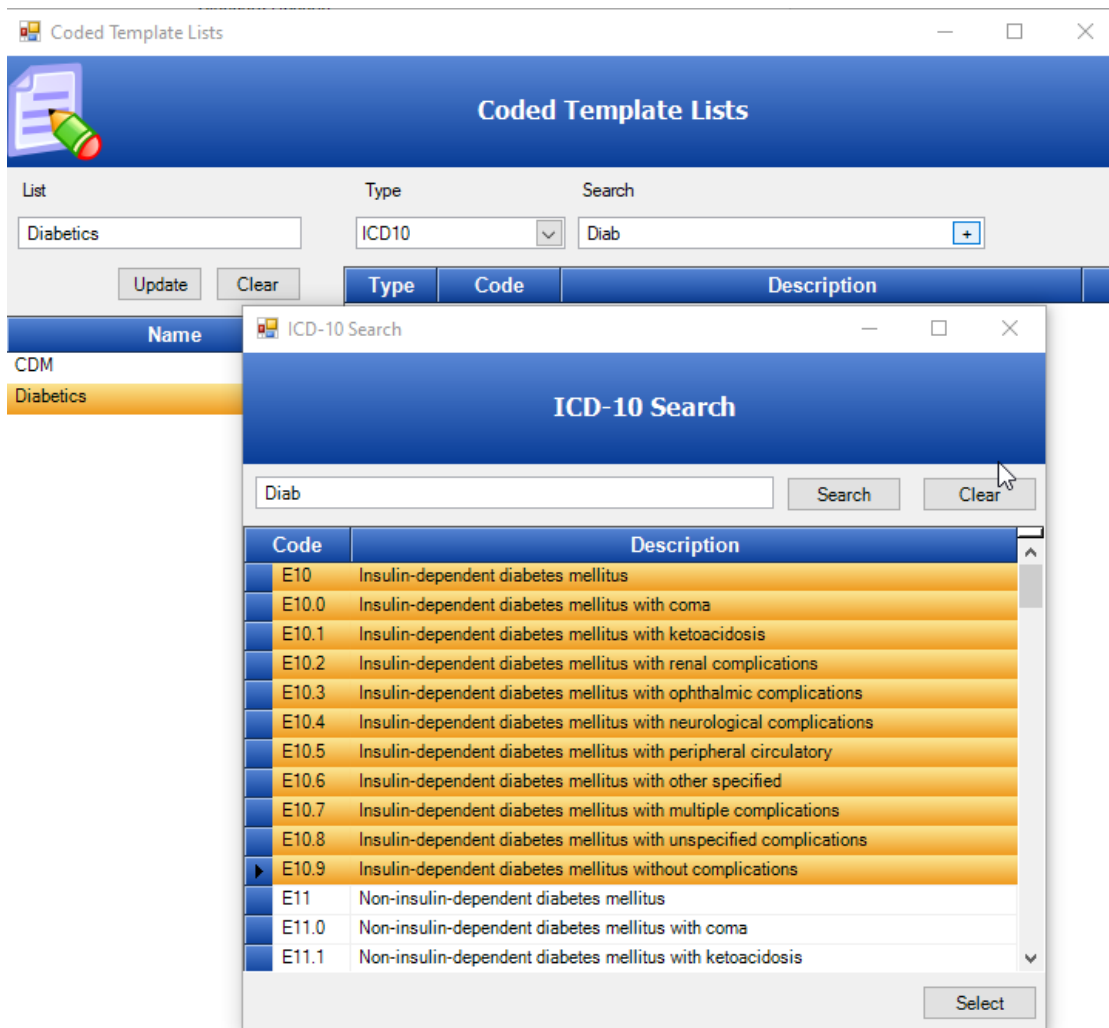


Enter name of the new template in List e.g. CDM, Diabetes Type II etc and click Save.



Select the Coded Template list e.g. Diabetics, CDM, Flu Shot etc. Select ICD10 / ICPC codes then enter the search criteria and click + button.

Select multiple codes and click **Select** button. Continue adding ICD10 and / or ICPC codes until your list is completed.



Click **X** to delete a code from the list.

Type	Code	Description
ICD10	E10	Insulin-dependent diabetes mellitus
ICD10	E10.0	Insulin-dependent diabetes mellitus with coma
ICD10	E10.1	Insulin-dependent diabetes mellitus with ketoacidosis
ICD10	E10.2	Insulin-dependent diabetes mellitus with renal complications
ICD10	E10.3	Insulin-dependent diabetes mellitus with ophthalmic complications

Click **X** on the top left corner to close the window. The list is automatically saved.

Once you have created the templates any user in the practice can use these for reporting.

Run **Patients With Multiple Conditions** report. (Ensure you download latest report from Reports Service).

Patients with Multiple Conditions

Patient Status: Active

Patient Type: All

Gender: All

Age between: 0 an 0

Include ICPC-2 And/OR ICD-10 Conditions

Any Conditions  All Conditions

Template List: [Dropdown] **Add**

Select one of the Template lists created earlier and click **Add**. This will populate all the ICD 10 and or ICPC 2 codes added in the template into the Report. Repeat as required.



The screenshot shows a web interface for selecting medical conditions. At the top, there is a checked checkbox labeled "Include ICPC-2 And/OR ICD-10 Conditions". Below this are two radio buttons: "Any Conditions" (selected) and "All Conditions". There are two dropdown menus: "Template List" with "CDM" selected and "Code Status" with "ALL" selected. An "Add" button is next to the "Template List" dropdown. Below these are two input fields, each with an "Add" button: "Add ICPC-2" and "Add ICD-10". There are two "Clear" buttons, one for each of the input fields. The bottom section shows a list of ICD-10 codes for insulin-dependent diabetes mellitus (E10) with various complications, such as "E10: Insulin-dependent diabetes mellitus" and "E10.0: Insulin-dependent diabetes mellitus with coma".

## 6 Control Panel

### Admin Console

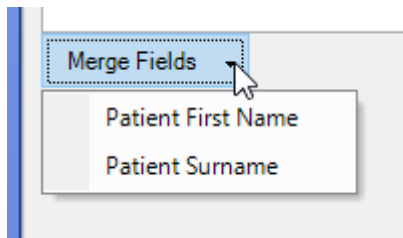
#### SMS Templates

You can now add the patients first name or surname as a merge field into your SMS Template.

Open My Control Panel > Admin Console > Categories & Templates and select **SMS Templates** tab.

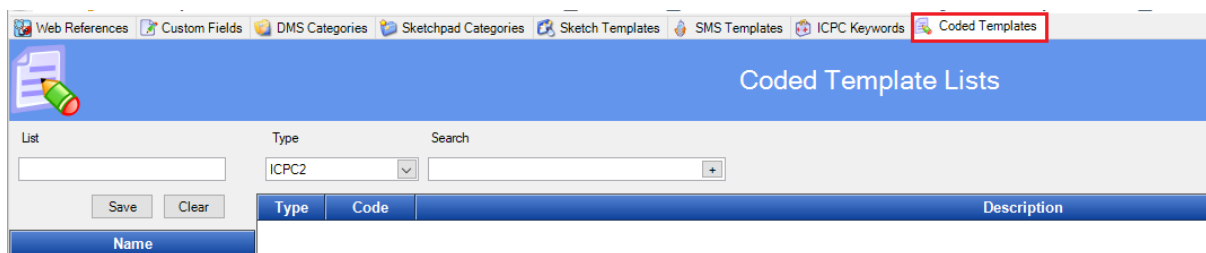
The screenshot shows the "SMS Templates" interface. At the top, there is a navigation bar with several tabs: "Web References", "Custom Fields", "DMS Categories", "Sketchpad Categories", "Sketch Templates", "SMS Templates" (selected), "ICPC Keywords", and "Coded Templates". Below the navigation bar is a "Template" dropdown menu. The main area is titled "Enter SMS Template Message" and contains a large text input field. At the bottom left, there is a "Merge Fields" dropdown menu. At the bottom right, there are "Save" and "Clear" buttons. The text "16011 Message" is visible in the bottom right corner.

Expand **Merge Fields** to add the Patients First Name or surname to the SMS Template.



## Coded Templates

Open My Control Panel > Admin Console > Categories & Templates and select **Coded Templates** tab.



## Claim Tracking

- Forms - Double clicking on a form will open that patients chart.
- Chronic Disease Management (CDM)

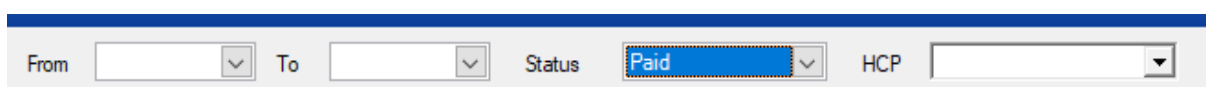
The **Response Date** has been added as a column to the Accepted, Rejected and Archived lists.

You can also record the payment received for a claim in the Accepted list which will move the claim to the Paid Status.

30/07/2020	30/07/2020	Smith, Evan	06/01/1947	GMS12345A	Accepted	Paul Johnson	Claim ID: 1000108157
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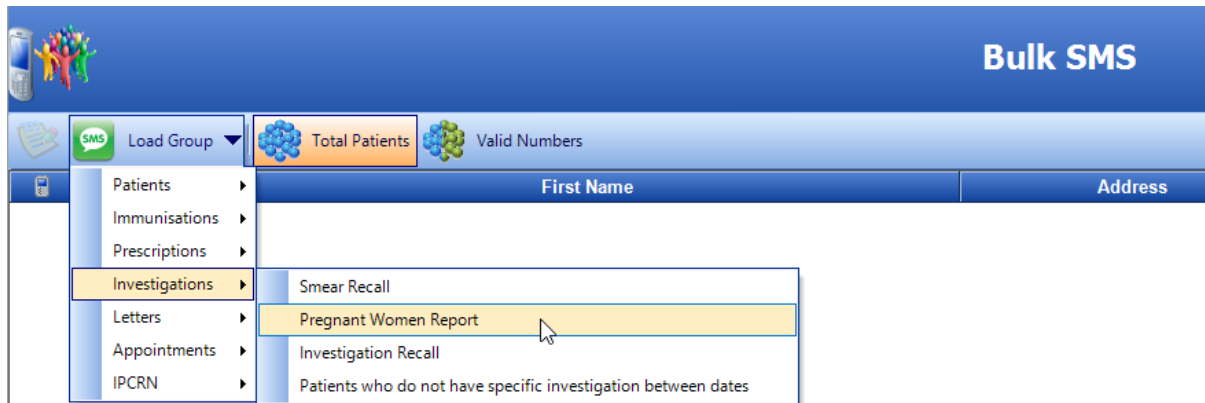
Payment Received  Amount Paid

Filter the list by Paid to find all your paid claims.



## 7 Communication > Bulk SMS

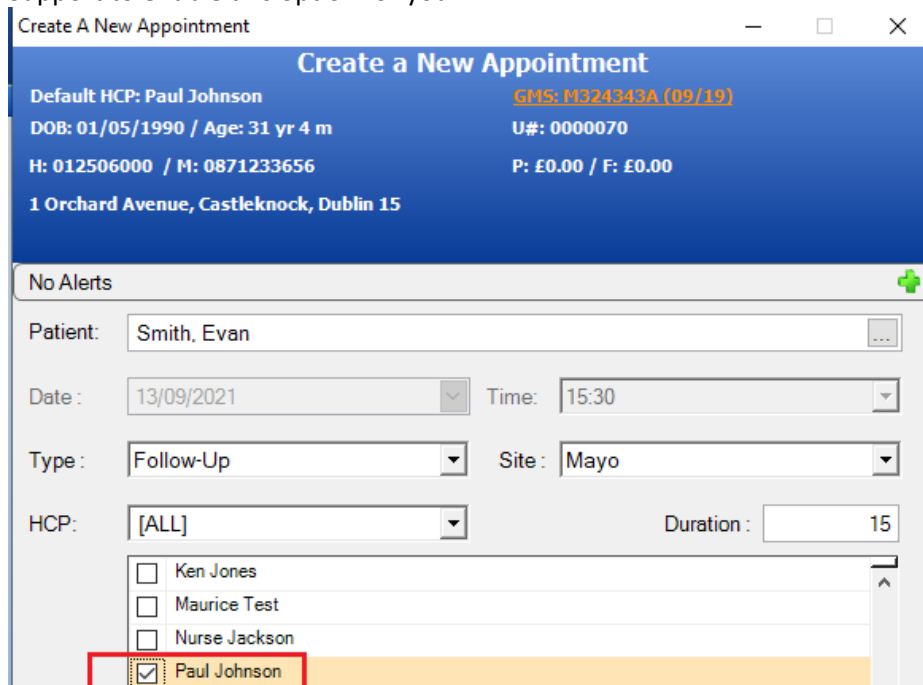
Pregnant Women report added to Investigations group in Bulk SMS. Communications > SMS Messaging. Select BULK SMS and select Investigations > Pregnant Women Report. Ensure the updated report is downloaded from Reports Service or it will not appear in the dropdown list.



## 8 Bugs / Tasks

- **Option to default Walk In's to the logged on HCP**

When this option is enabled it will set the default HCP as the logged in HCP. Please contact Support to enable this option for you.



- **Prescriptions**

Performance of Drug interactions checks improved.

- **CDM**

If a CDM visit cannot be submitted due to a healthlink error, the reviewing doctor can be updated. The Reviewing Doctor's MCN will be sent with the message to healthlink using the cert on the machine.

The screenshot shows a window titled "CDM Review Audit Details". It contains two sections: "Reimbursement Message" and "Clinical Message".

**Reimbursement Message:**

- Control ID: ORU2020072316470006012121
- Original Control ID: ORU2020072316470006012121 (with a "Remove" link)
- Status: Rejected
- Details: Updated on 23/07/2020 16:48 by Doctor Tester
- Submitted: 23/07/2020 16:47 (with a "Copy HL7" link)
- Acknowledged: 23/07/2020 16:47 (with a "Copy ACK" link)

**Clinical Message:**

- Control ID: ORU2020072316470033012121
- Status: Rejected
- Details: Updated on 23/07/2020 16:48 by Doctor Tester
- Submitted: 23/07/2020 16:47 (with a "Copy HL7" link)
- Acknowledged: 23/07/2020 16:47 (with a "Copy ACK" link)

At the bottom right, there are "OK" and "Cancel" buttons. The "Reviewing Doctor" field at the top is highlighted with a red box and contains "Doctor Tester" with an "Update" link.

- **Online Bookings**

Online appointment settings and online diary availability renamed.

The screenshot shows the "Online Diary Availability" settings for a user named "Gáry Black".

Navigation tabs: Appointment Types, Appointment Groups, Cancellation Reasons, Online Appointment Settings, Online Diary Availability.

Left sidebar menu: Appointments, Appointment Types, Appointment Groups, Cancellation Reasons, Options, Online Settings, Online Availability, Navigation.

Settings for "Gáry Black":

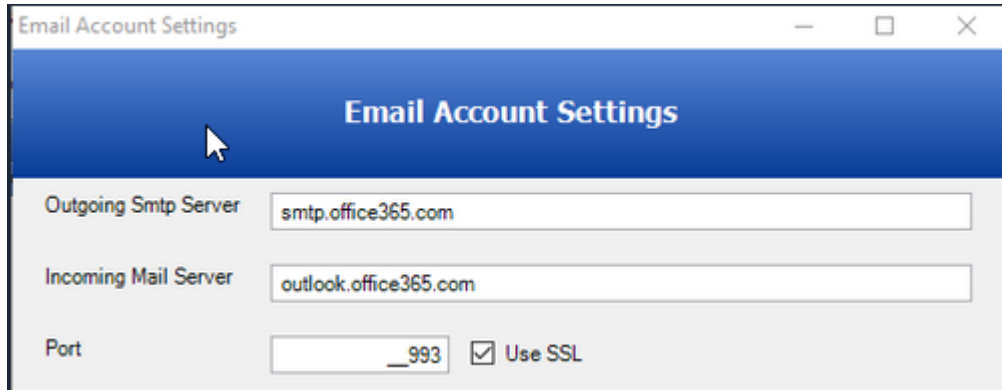
- HCP: Gáry Black
- HCP Available On Portal
- Default Timeslot (minutes): 15

Availability grid for "Gáry Black":

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
12:00	Available	Available	Available	Available	Available	Available

- **Healthmail**

The Healthmail email account settings now default to Office 365.



If you are still using outdated Technology e.g. Windows 7 then you will need to upgrade your machine in order to continue using Healthmail in Socrates.