

### Practice

#### Create Virtual Appointment

Create an appointment for the patient on the Socrates diary. Click **Virtual Appointment** and enter the patient's email address. Confirm the patient's email address and date of birth are correct in Socrates before clicking **Create**.

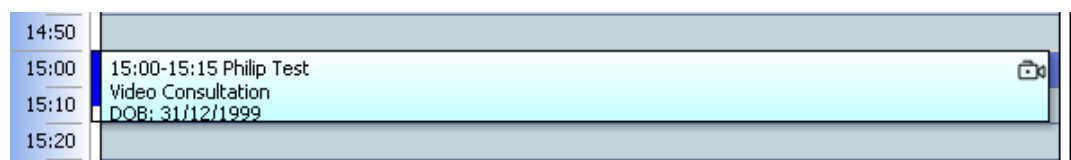


Notes :

Virtual Appointment      Email:

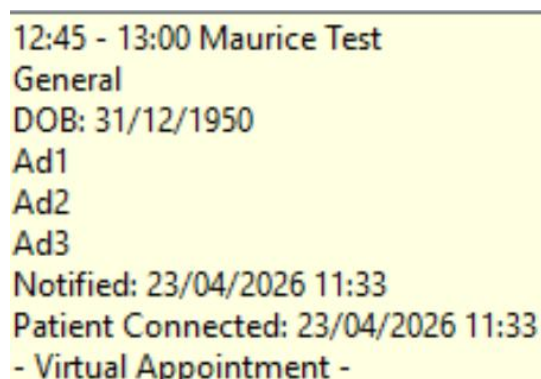
When appointment is created an email is sent directly to the patient with the appointment details and a link to perform a test video consultation.

A Camera icon will be displayed to the right of the appointment slot on the diary.



14:50	
15:00	15:00-15:15 Philip Test
15:10	Video Consultation DOB: 31/12/1999
15:20	

If the patient tests the video consultation you will be able to see the confirmed date and time when you hover over the appointment.

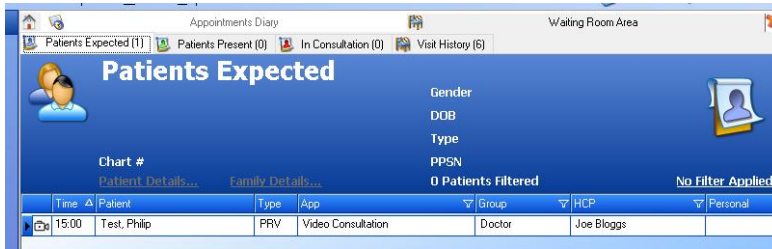


12:45 - 13:00 Maurice Test  
General  
DOB: 31/12/1950  
Ad1  
Ad2  
Ad3  
Notified: 23/04/2026 11:33  
Patient Connected: 23/04/2026 11:33  
- Virtual Appointment -

To update an existing appointment to a Video Consultation, double click to edit the appointment. Click Virtual Appointment, enter the patient's email address, and click OK.

#### Waiting Room

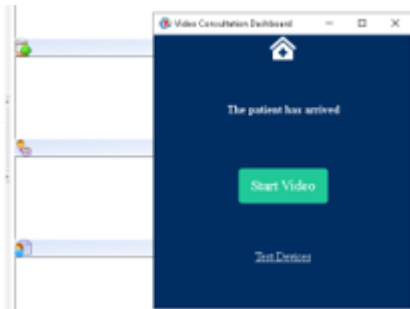
In the waiting room a video camera icon is displayed to indicate that the appointment is a video consultation.



The patient will receive an email to join the consultation 30 minutes before the appointment date/time. Once the patient begins the consultation the patient will move from 'Patients Expected' to 'Patients Present.'

### Begin Consultation

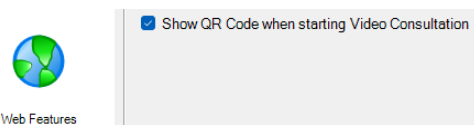
When the HCP begins the consultation, the Video Consultation Dashboard is displayed. Click **Start Video** when you are ready to begin the video consultation.



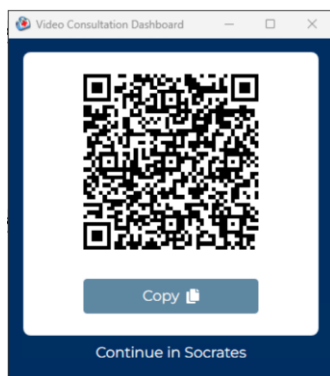
If you are taking another HCP's video consultation, you must click 'Start Video Consultation' to launch the Video Consultation dashboard.



If you are a Socrates Cloud customer or want to use your own device (Phone or Tablet) for the consultation, click Edit > Preferences > Web Features and check 'Show QR Code'.



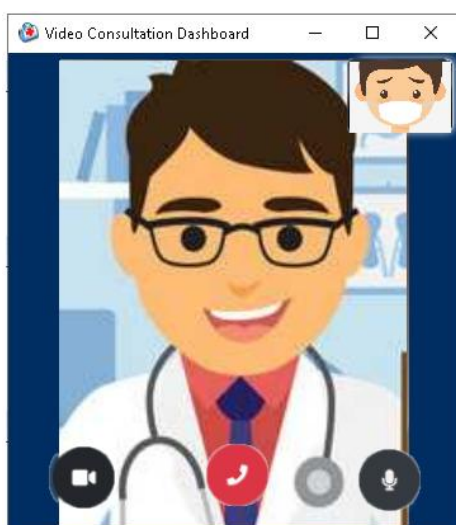
Use the camera on your device to scan the QR code. Alternatively, click Copy and paste the link into your browser to use your local machine.



### Start Video Consultation

The patient will receive a prompt on their device that you are ready to see them. They will click **Begin Consultation**.

Once the patient clicks 'Begin Consultation' you will be connected to the patient. On your screen you have the buttons to hide your camera and to mute your voice.



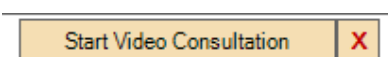
Use the minimise button  to hide the video consultation dashboard temporarily.

On the main menu beside HOME, you will see a timer showing the duration of the Video Consultation. Click the timer to maximise the video consultation dashboard.



Click red phone icon  to end the video consultation.

To re-join an existing Video Consultation, reopen the patient's chart from the Consultation menu or the Waiting Room. Click the **Start Video Consultation** button to open the Video Consultation Dashboard.



## Patient

### Appointment Confirmation Email

The patient will be notified by email of the appointment and a link to test the device camera, microphone, and speaker.

### Start Consultation Email

A second email will be sent 30 minutes before the appointment time with a link to start the video consultation.



Clicking **Start Consultation** will launch the Consultation webpage. The patient must then enter their Year of birth, then Month, then select the Day. Patient will be advised that the doctor will be with them shortly.

When the Doctor begins the consultation from Socrates / their device, the patient will be advised that the doctor is ready for them and they can click 'Begin Consultation'.



If for any reason the patient is disconnected from their video consultation, they can click the link in the original email to begin the consultation again.

## Data Privacy

1. Patient Information.
  - a. The patient email address is required.
  - b. No other patient identifiable data is required.
2. P2P (Peer 2 Peer) Video consultation.
  - a. Fully encrypted end-to-end (E2E).
  - b. Not possible to record.