Socrates Departmental Support

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
- Patients default department can be stored in Patient Registration
- Preference available to set your default department
- Preference available to filter the waiting room by department

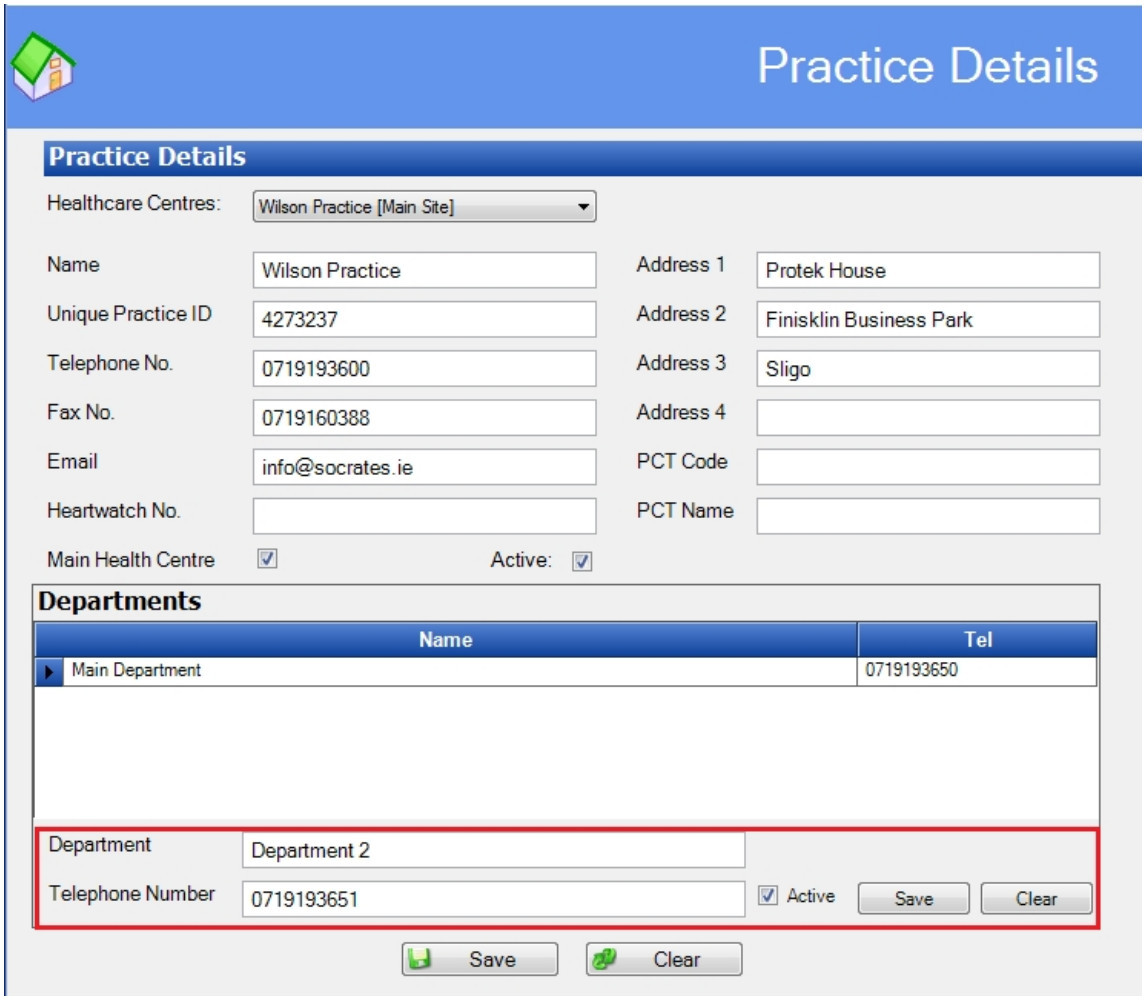
Contents

1. Setup

1.1 Create Departments

1. Select My Control Panel > Admin Console > Practice.

2. Select the main practice from the **Healthcare Centres** dropdown list.



1. Enter the Department name & phone number and click **Save**.

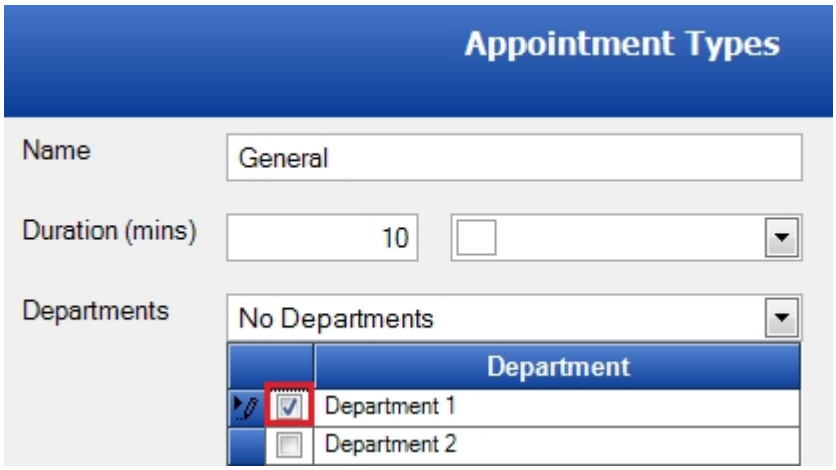
2. Click **Save** on the Practice form to record all changes.

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

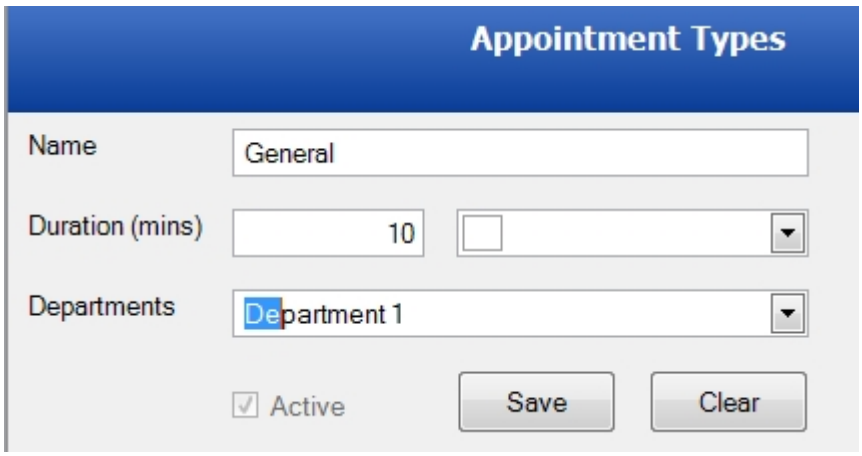
1.2 Appointment Types

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.

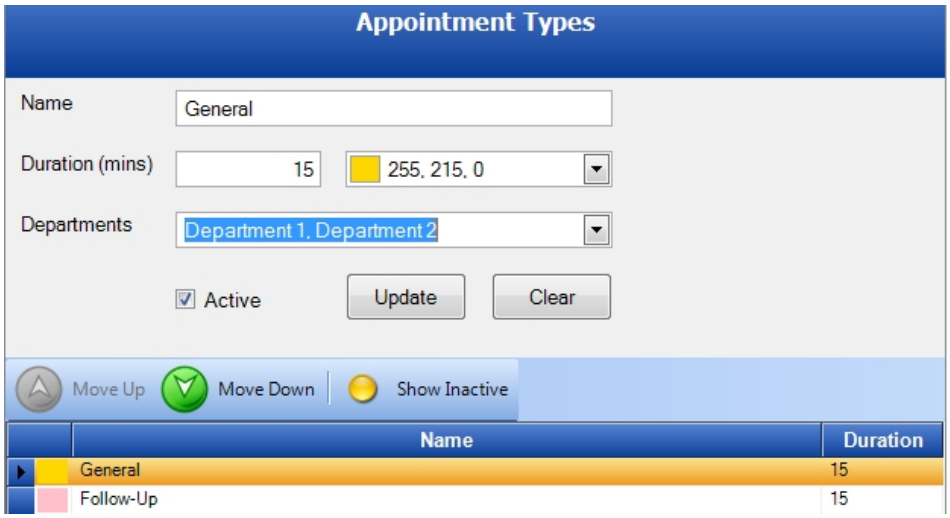


2. Once you have selected all the departments you want click **Save**.

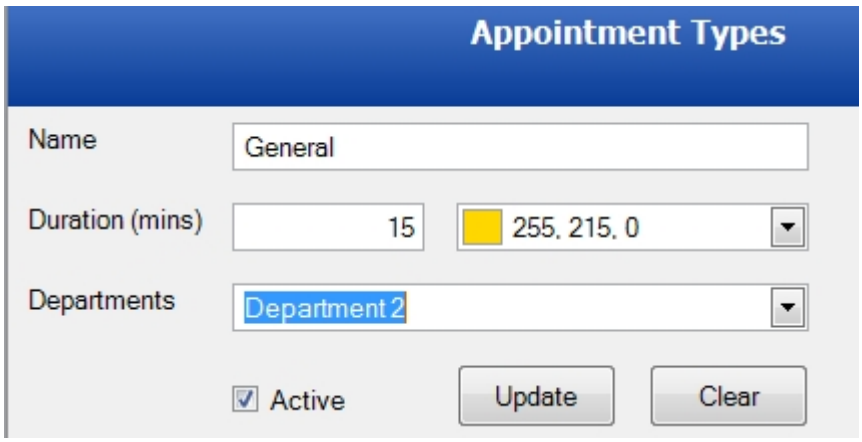


Note: Click inside the department box and it will refresh with the selected list of departments.

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



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

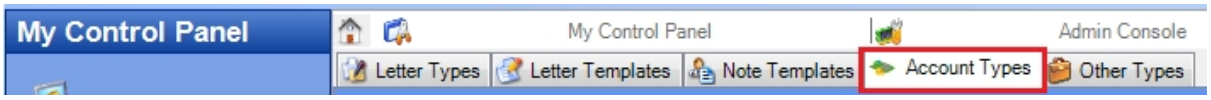


Note: Click inside the department box and it will refresh with the selected list of departments.

1.3 Account Types

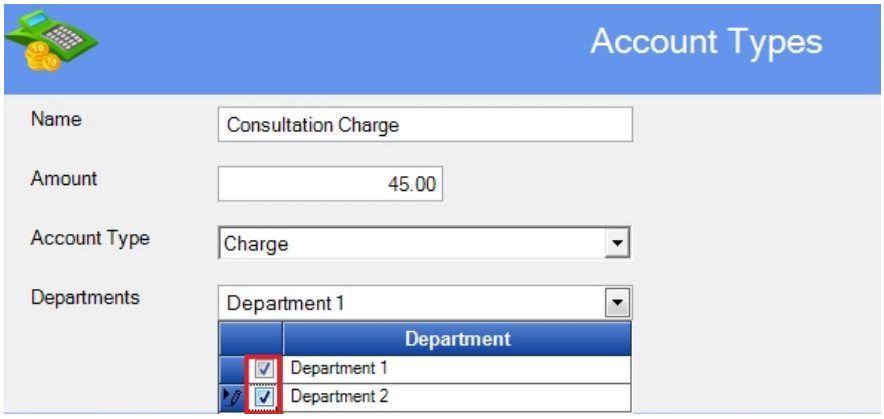
You must select which Account Types belong to each department created. Open the account types from Control Panel > Admin Console > System Types.

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

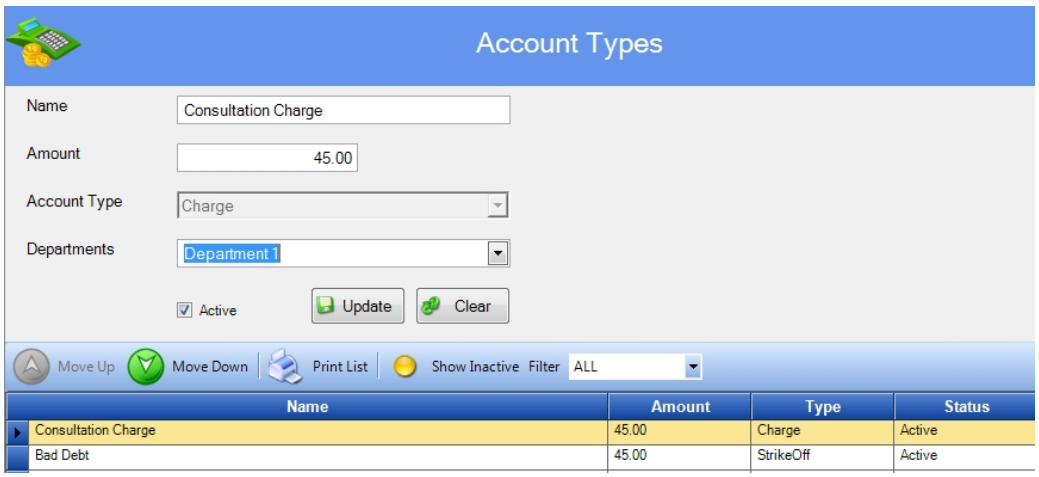


2. To create a new Account Type, enter the Name e.g. Consultation Charge, the amount and select the Account Type from the dropdown list e.g. Charge.

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.

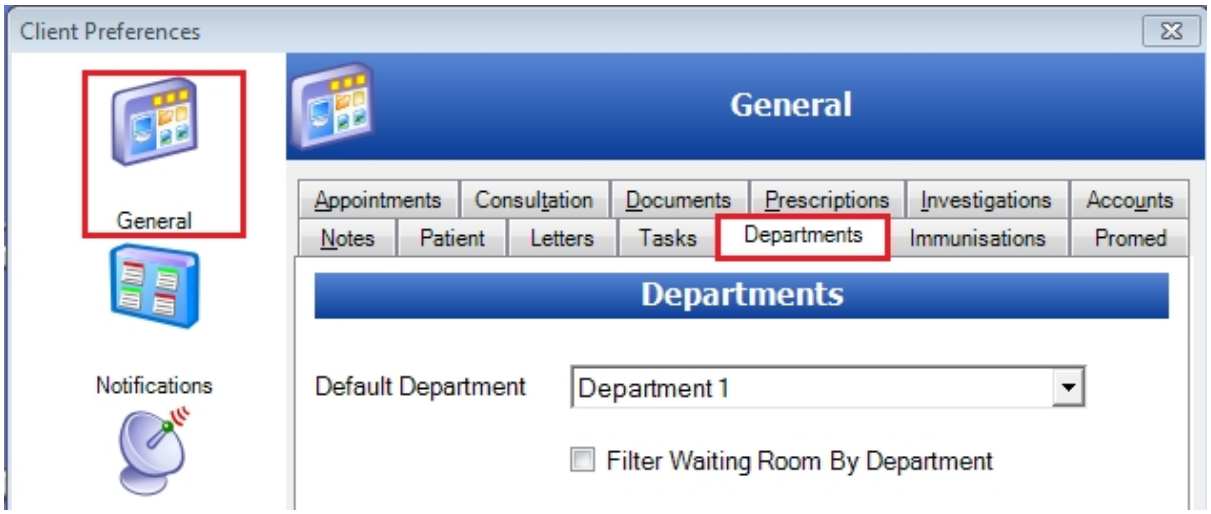


5. Select the departments required from the dropdown list and click Update 

to save your changes.

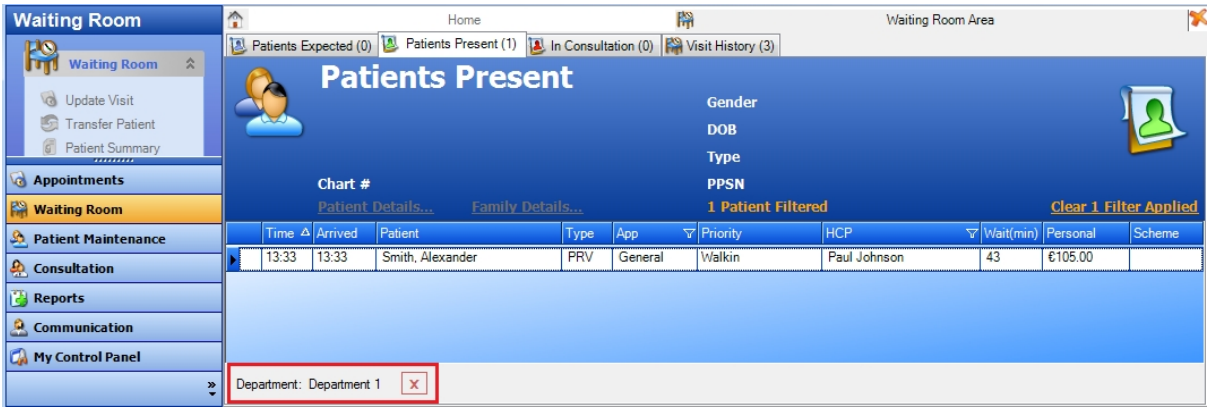
1.4 Preferences

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



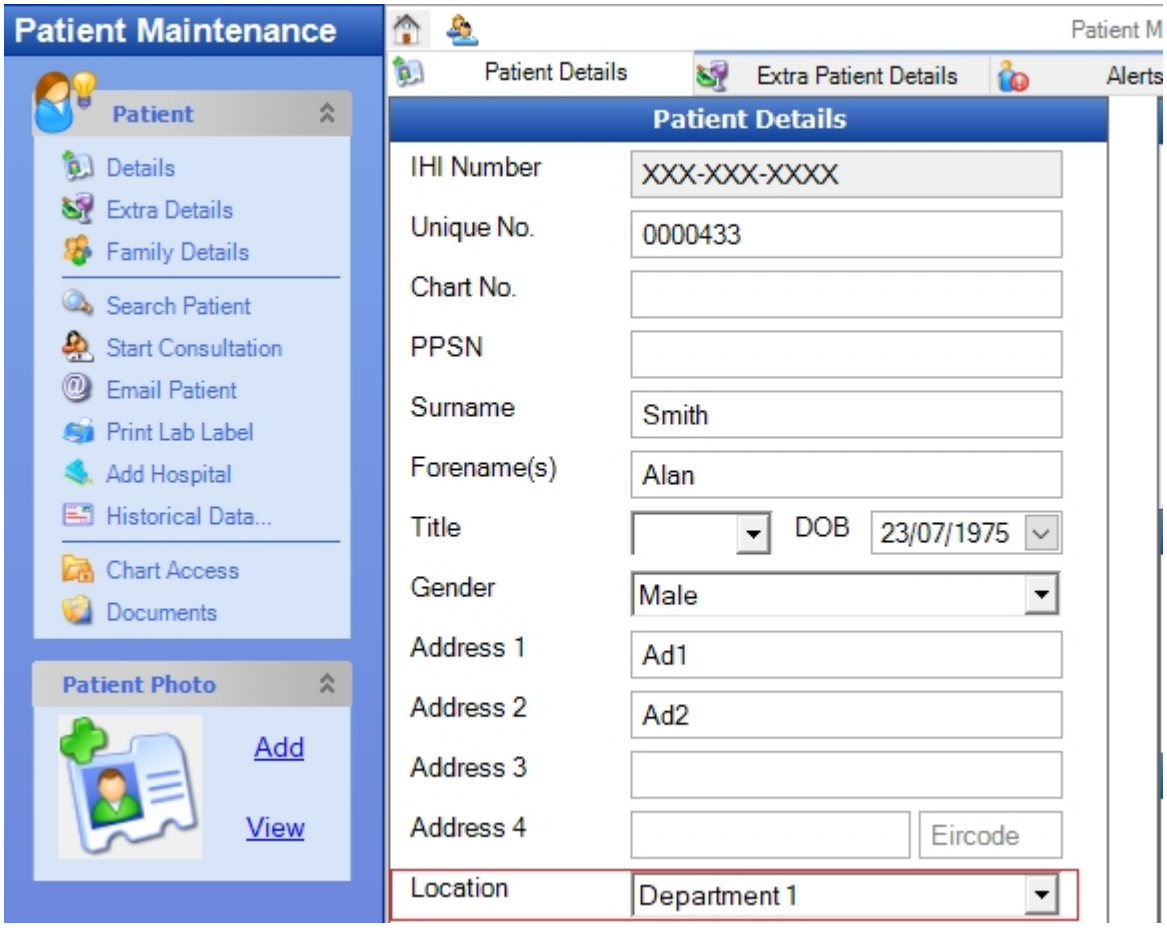
When the **Default Department** is set, whenever you create an appointment, charge or payment it will default to this department.

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



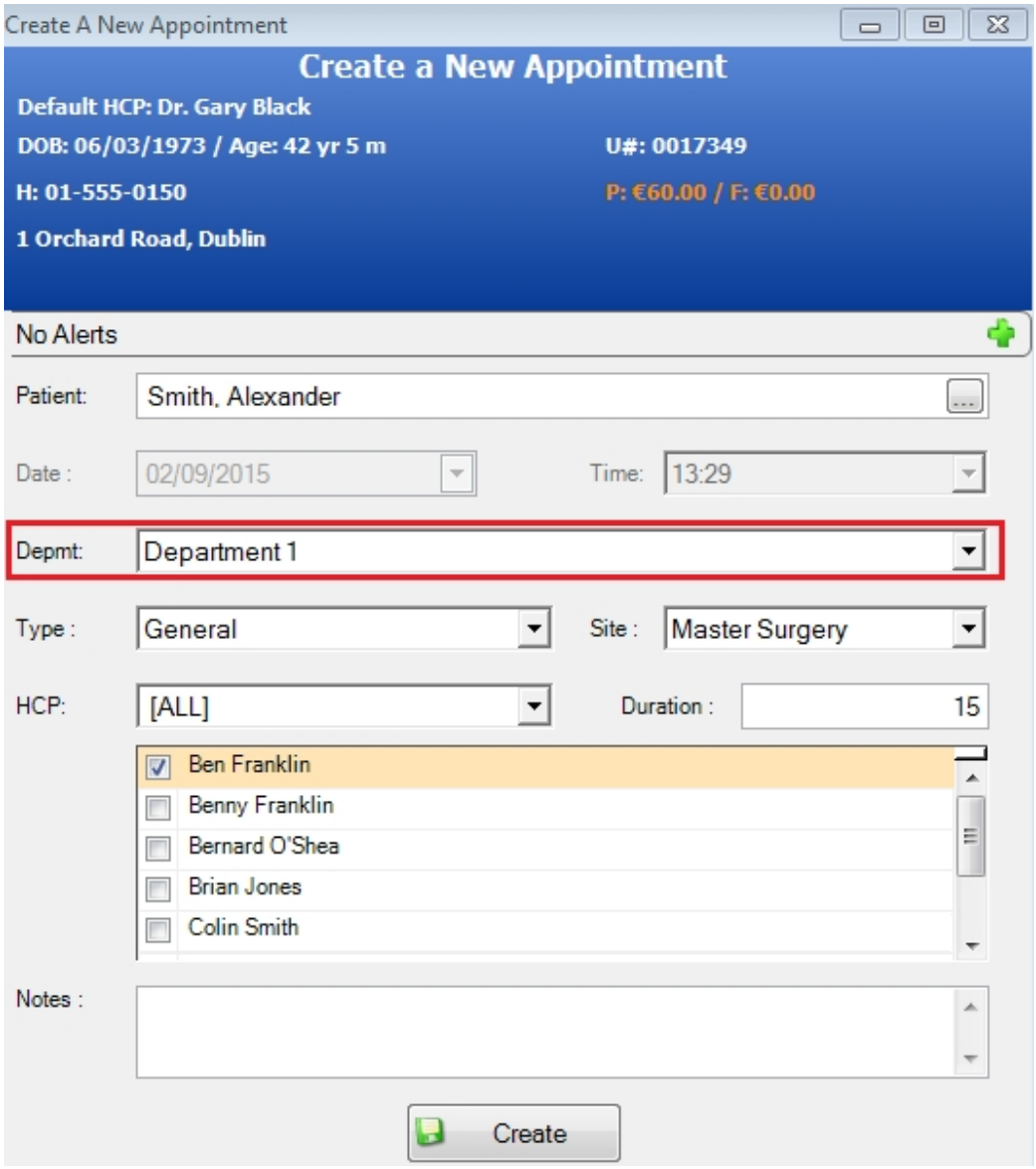
2. Patient Registration

When creating or editing a patient from Patient Registration, you can select a default department for the patient by using the Location dropdown list.

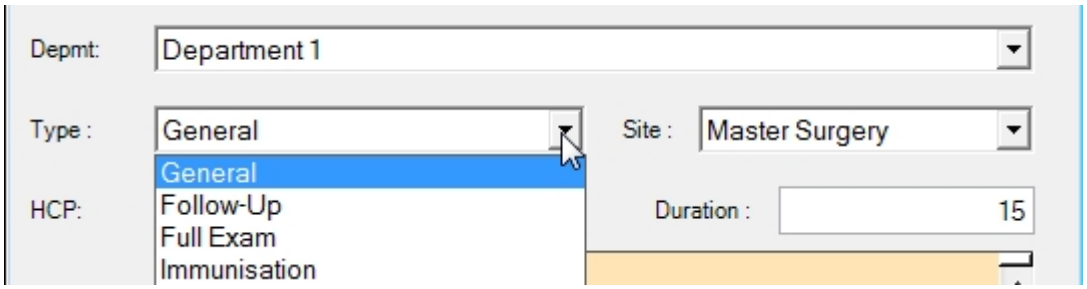


3. Add Appointment

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

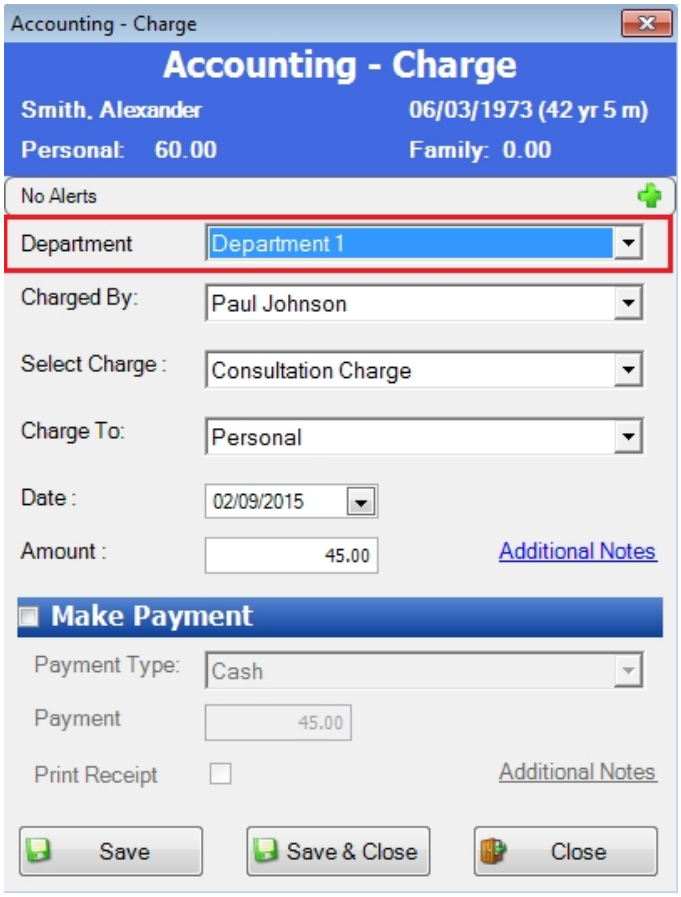


4. Accounts

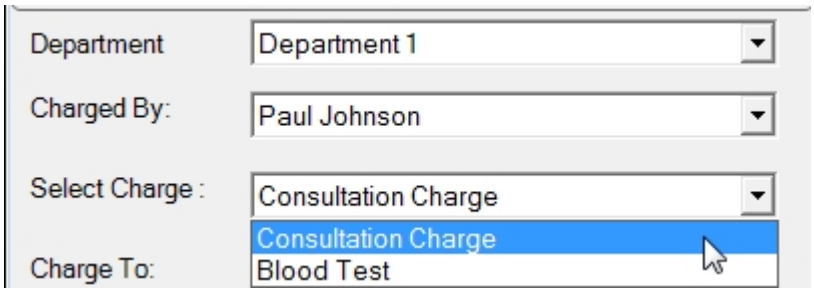
3.1 Add Charge

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.



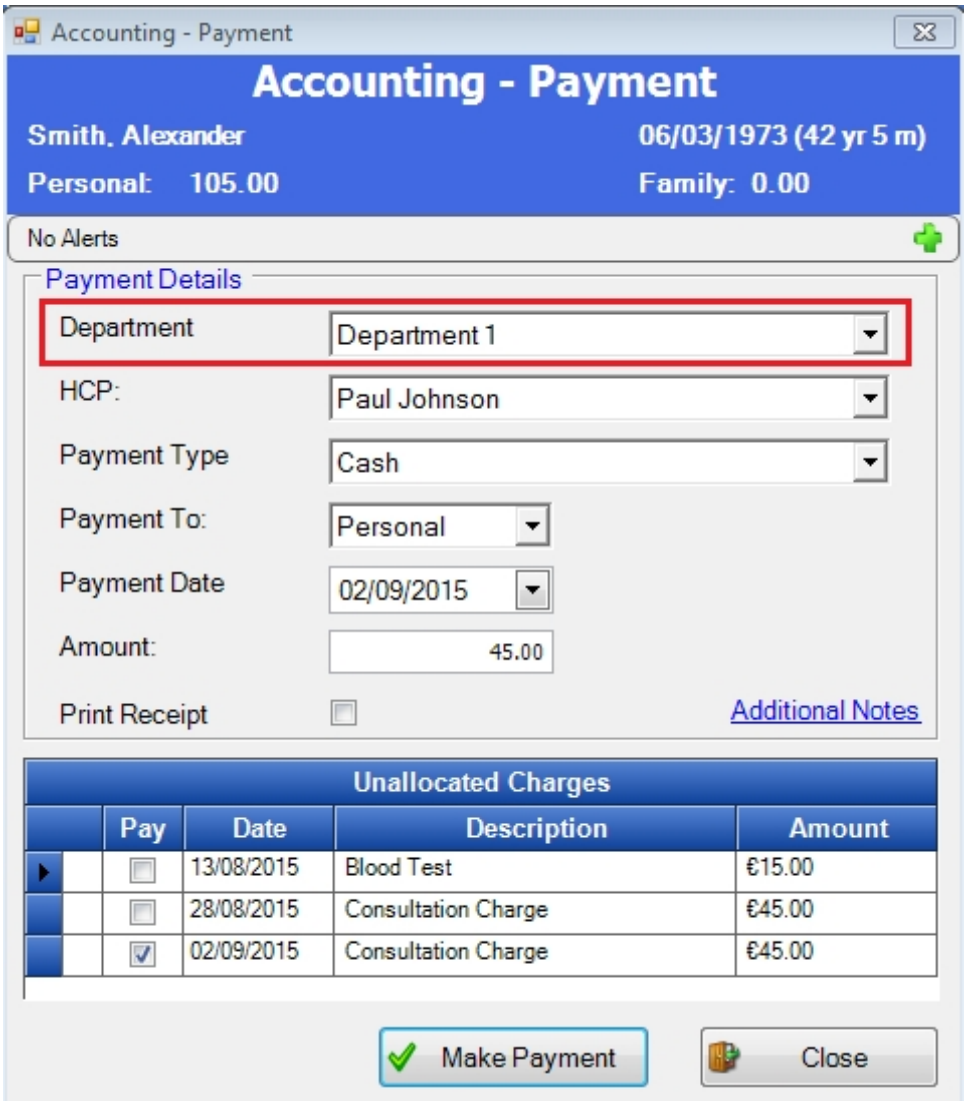
The **Select Charge** dropdown list will filter to the charge Account Types linked to the selected department.



3.2 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.



5. Reports

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


Standard Reports
Standard Reports
Custom Reports
Patients
Immunisations
Prescriptions
Investigations
Letters
Accounting
Appointments
Audit Log
Departmental
Other
Provides Reports by Department
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