

For First time users please contact the Support desk to make the necessary adjustments required to enable this feature.

The doctors GMS Number must be entered in Control Panel > My Profile (of the actual user) or through Socrates Server Management program on the server before their PCRS file can be imported. You must have a valid PCRS Certificate on your machine.

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1. Download latest list from PCRS Website

Setup: Create Folder on your C drive called **PCRS Downloads**.

Each month download the latest files by logging onto the PCRS GP application suite. Click on Manage Doctor if more than 1 GMS doctor in your practice.

- Follow the below steps to download the current list:
 - Click Capitation Drilldown (2nd on list)
 - Capitation Download (Top of page)
 - Full Patient List IHI numbers (TEXT FORMAT)
 - Click 'I Accept'
 - Save (in C:\PCRSDownloads)

2. Import PCRS file

Open Patient Maintenance and click PCRS Importer.



Setup - Match Patient Types

The first time you run the **PCRS Importer** you will be required to match the GMS/DVC Type from the excel file (downloaded from PCRS website) to the Patient Type you use in Socrates GP.

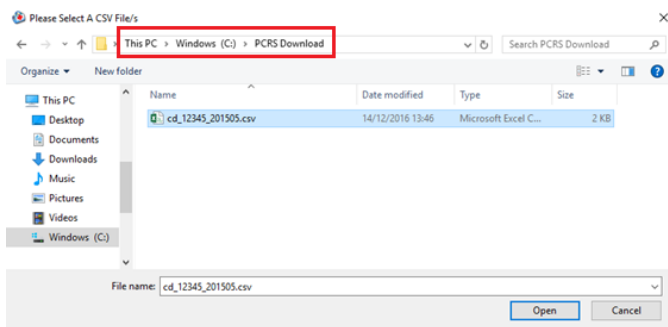
1. Select the patient type that you use for Private Patients in Socrates e.g. Private.
2. Select the patient type that you use for GMS Patients in Socrates e.g. GMS.
3. Select the patient type that you use for DVC Patients in Socrates e.g. DVC or Doctor Visit Card.
4. Select the patient type to match deceased Patients to in Socrates e.g. Private



Click **Save GMS/DVC to Patient Types** to continue.

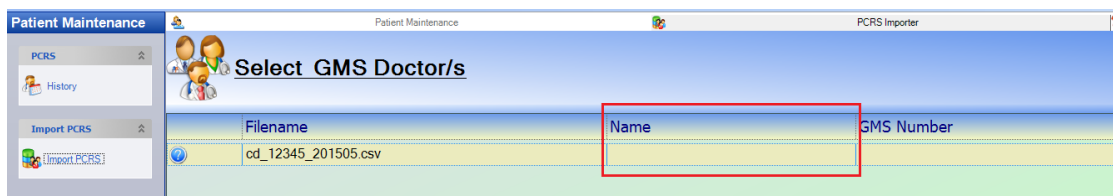
- Click **Import PCRS** button to begin.

- Navigate to the **PCRS Download** folder that you created and double click to select the file(s) to import.

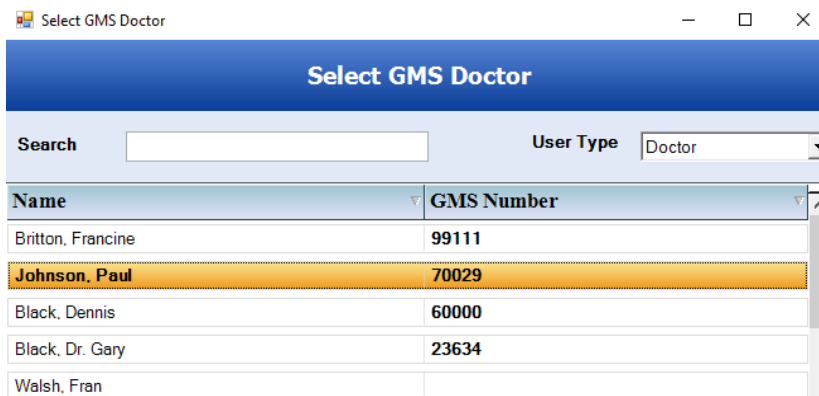


If you want to import the excel file for all doctors press CTRL key on the keyboard and click once on each file and then Click on **Open**.

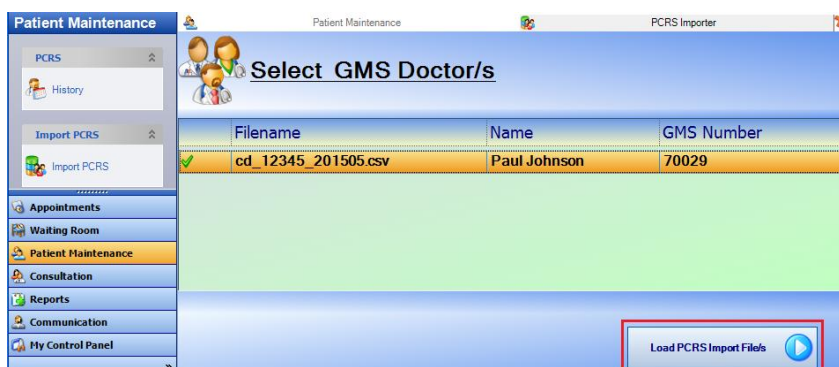
- Match correct GMS doctor to each file (by double clicking on blank space under 'Name').



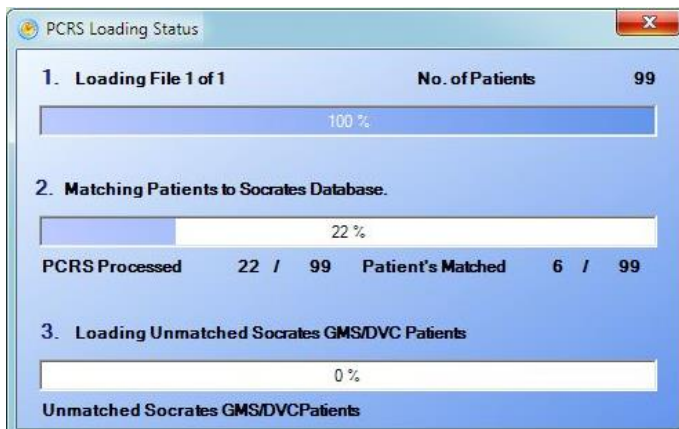
- Double click on the correct GMS doctor.



- Click **Load PCRS Import File/s** to continue.



A progress bar will show the status of the import.



The importer will load the file(s) selected into a grid and try to match the records to patients in your Socrates database.

When you import the list Socrates will usually 'match' most of the patients on the imported list to existing patients in Socrates.

3. Review the Imported List

3.1 Patient Matching

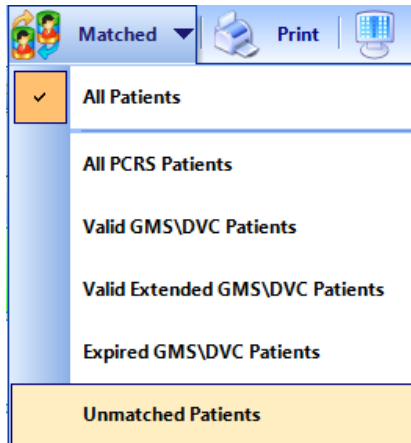
Socrates will not match any patients where there is conflicting information (i.e. incorrect DOB/GMS, variation in patient name, Pat & Patrick etc.). You will be required to match these patients manually.

When you match a patient once, Socrates will always remember this mapping and you will not be required to match this patient again in the future.

Left panel shows records contained in the PCRS file. Right are patients in Socrates. The matched patients are highlighted in Green.



Unmatched Patients are displayed in White. Click **Matched** and select **Unmatched Patients** from the dropdown list.

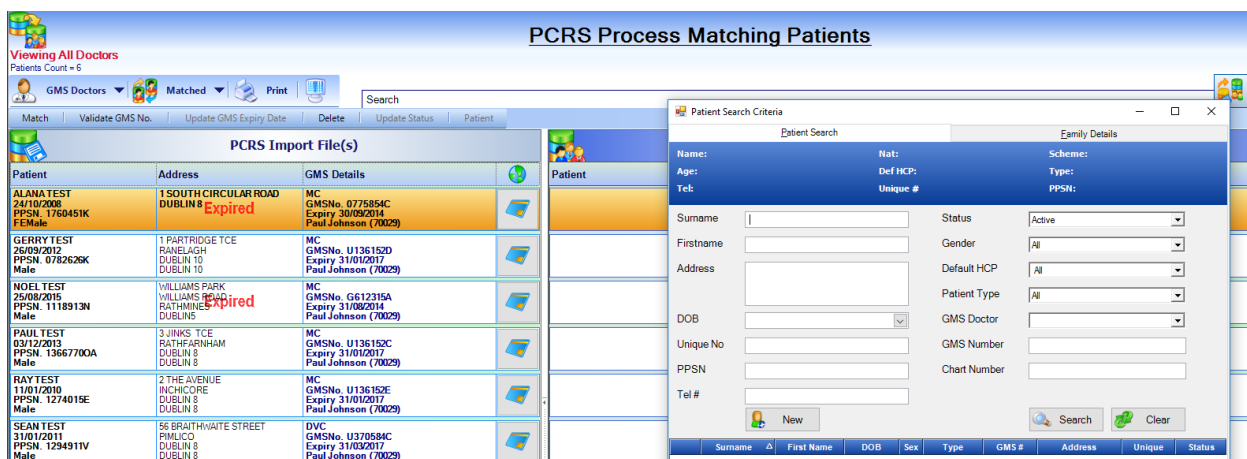


Left panel shows records contained in the PCRS file. To match these to Socrates patients double click on the blank space across from their name on the right hand side.



The Socrates Patient Search window will appear allowing you to search for the correct patient in the Socrates database. Also search with status of ALL to ensure that you do not create duplicate patients. If patient is Inactive, ensure that you reactivate them. To create a new Patient, click **New** and register the patient.

Double click to select the patient.

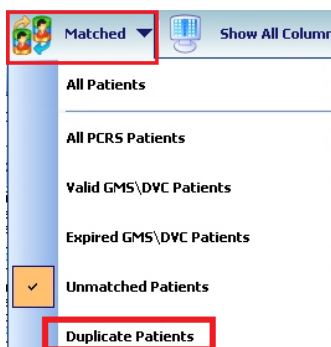


The patient in the PCRS list will be matched to the patient in Socrates.

PCRS Import File(s)			Socrates Patients		
Patient	Address	GMS Details	Patient	Address	GMS Details
Fred Bundy 16/05/2005 PPSN: 2324789A Male	3 Fake St Test Sligo	MC GMSNo. F963852C Expiry 31/10/2011 Dr. Andrew Valley (12315)	Fred bundy 01/01/2000 PPSN: Male	Address Line 1 Address Line 2 Address Line 3 Co Sligo	Private GMSNo. Expiry
Jessica Bundy 03/05/2007 PPSN: 2796151D Female	4 Fake St Test Sligo	MC GMSNo. F561234C Expiry 31/09/2010 Dr. Andrew Valley (12315)			

3.2 Duplicate Patients

Select the **Matched** button and select **Duplicate Patients**. A duplicate patient is created when two individual patients on the GMS list are matched to the same patient in Socrates.



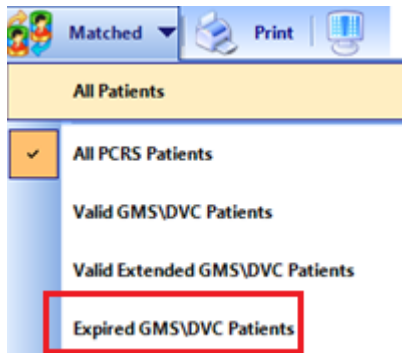
Identify which row contains the incorrect patient. Select the row and click **Delete** to remove the mapping.

PCRS Import File(s)			Socrates Patients		
Patient	Address	GMS Details	Patient	Address	GMS Details
Fred Bundy 16/05/2005 PPSN: 2324789A Male	3 Fake St Test Sligo	MC GMSNo. F963852C Expiry 31/10/2011 Dr. Andrew Valley (12315)	Fred bundy 01/01/2000 PPSN: Male	Address Line 1 Address Line 2 Address Line 3 Co Sligo	Private GMSNo. Expiry
Jessica Bundy 03/05/2007 PPSN: 2796151D Female	4 Fake St Test Sligo	MC GMSNo. F561234C Expiry 31/09/2010 Dr. Andrew Valley (12315)			

When the incorrect duplicate is deleted, the match will be complete and will turn **green**. This patient will return to unmatched.

3.3 Other Filters

Use the Matched button to view a range of filters you can use to view the different GMS/DVC status of patients in the PCRS file and in your local Socrates database e.g. Expired GMS / DVC Patients.

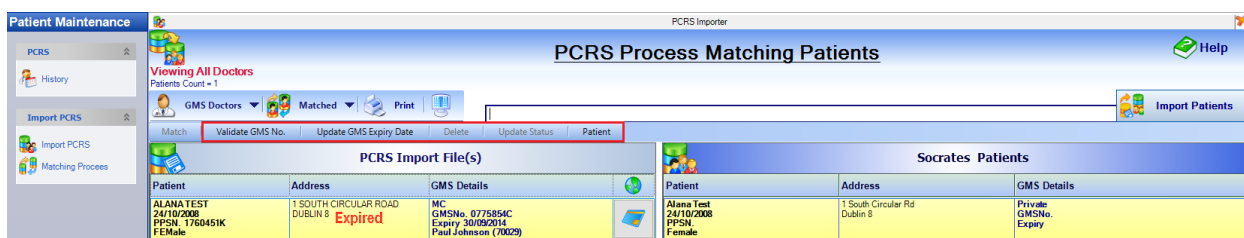


3.4 Update GMS Status (optional)

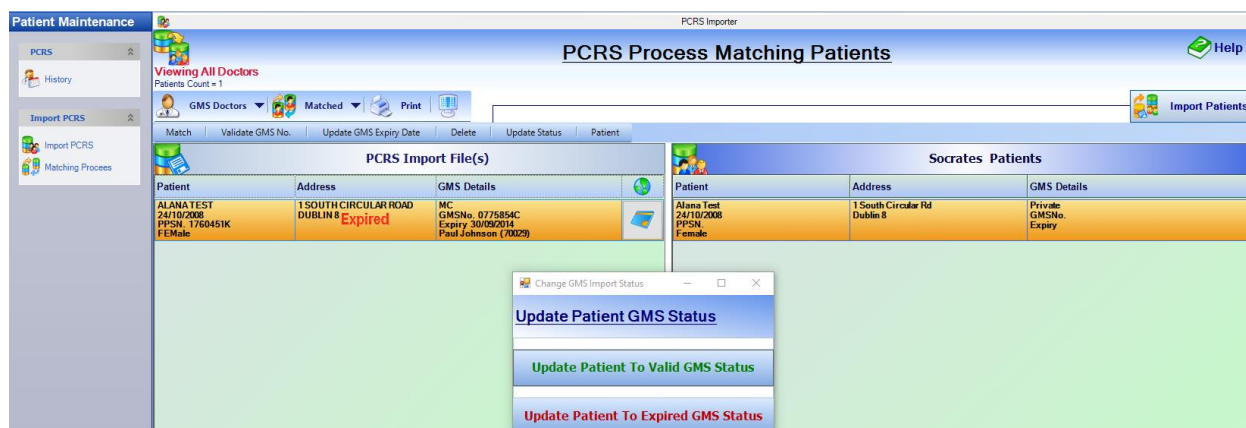
Check the patients GMS Status online by selecting the patient and clicking **Validate GMS No.** This is useful to confirm that the patients GMS status has not changed since the date the list was generated by PCRS.



Then click **Update GMS Expiry Date**. To update the GMS status of a patient, select the row and click **Update Status**.



Select **Update Patient to Valid GMS Status** or **Update Patient to Expired GMS Status**.



You can also select the row and click **Patient** to open Patient Demographics.

4. Import Patients GMS / DVC updated details into Socrates

Click the **Import Patients** button once the list is reviewed.



A summary screen will be displayed before you confirm the Import.



Note: Check **Leave PCRS Expired Patients as GMS** if you DO NOT WANT to change the Patient Type in Socrates from **GMS / DVC** to **PRIVATE** for all patients on the PCRS list with an expired card.

You will also have additional options to update the Patients in Socrates which ARE **NOT** in the PCRS list.

Update Remaining UnMatched Socrates Patients From GMS/DVC Status to Private

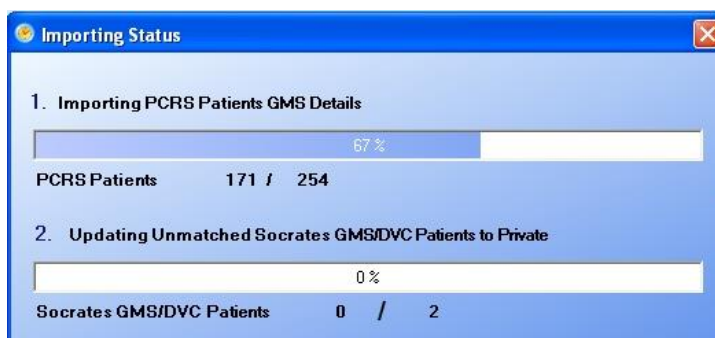
- ☐ **Yes** By checking "Yes" all remaining Local Socrates Patients that have an active GMS/DVC Status and GMS Expiry Date has ended will be downgraded to private patients.
- ☐ Updates All Remaining Local Unmatched Socrates Patients that are Valid GMS/DVC to private.

- Check the **YES** box if you want to change the Patient Type in Socrates from **GMS / DVC** to **PRIVATE** for all patients **NOT** on the PCRS list but who have an expired card recorded in Socrates.
- The checkbox underneath will change the Patient Type in Socrates from **GMS / DVC** to **PRIVATE** for all patients **NOT** on the PCRS list but who have an expired card recorded in Socrates.

Click **Proceed to Import PCRS patients** to finish the import process.



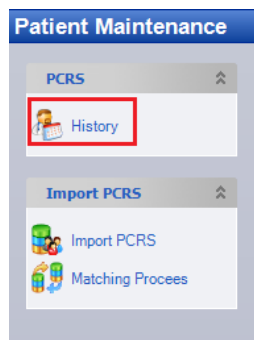
The Import status is displayed on screen.



When the PCRS Import is completed the **Proceed to Import PCRS Patients** is disabled.

5. Other

5.1 PCRS Import History



Details of each Import are displayed in the Import History section.

Patient Maintenance

PCRS

Import History

Import PCRS

Import PCRS

PCRS Importer

PCRS Import History

Date Imported	Imported By	PCRS Patients	Matched PCRS	Unmatched Patients	Info
16/12/2016 10:04	Paul Johnson	7	2	0	
GMS Doctor		PCRS Patients		Matched Patients	
Paul Johnson		7	2		

5.2 IHI Number

IHI Number will be downloaded for each patient in the PCRS file (if available) and is populated in the patient's chart.