

# socrates

## Socrates GP v2.7.1.2 Update User Manual

April 2020

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### Socrates Message

*This update manual documents the updates that have been made to Socrates GP in release version 2.7.1.2. This release includes allowing non GP staff to send an eScript notification to the Pharmacy on behalf of the GP together with the integration of the Bank of Ireland Payment Acceptance (BOIPA) to allow users take Card payments using the Card Terminal 'Lane 5000' together with some improvements and bug fixes.*

*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)*

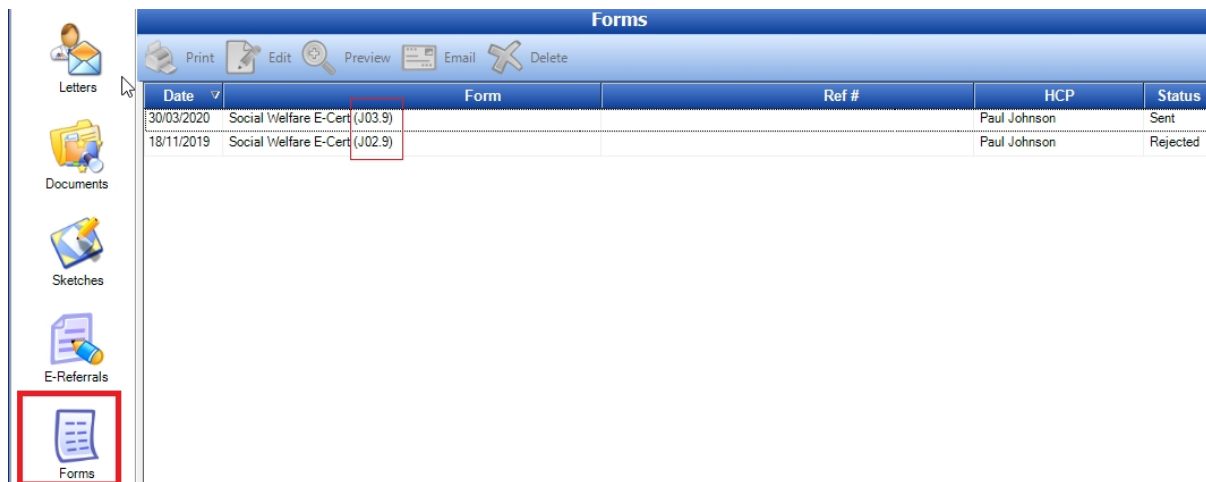
*Regards*

**Socrates Team, Clanwilliam Health**

## 1 Consultation

### 1.1 E-Cert

ICD-10 code is displayed for Med 1 certs in Patients Documents > Forms.



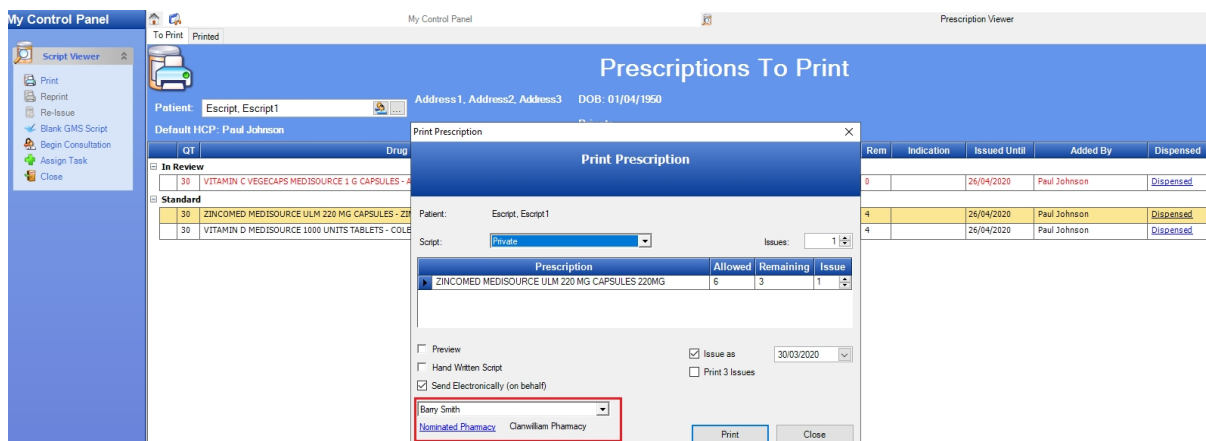
### 1.2 STC Form

New Codes added to the STC Form as follows: CA – Respiratory Assessment for eligible patients; CB – COVID-19 Telephone Triage for eligible patients; CD – Non COVID-19 Tele Consultation/Triage for medical/GPV card holders.

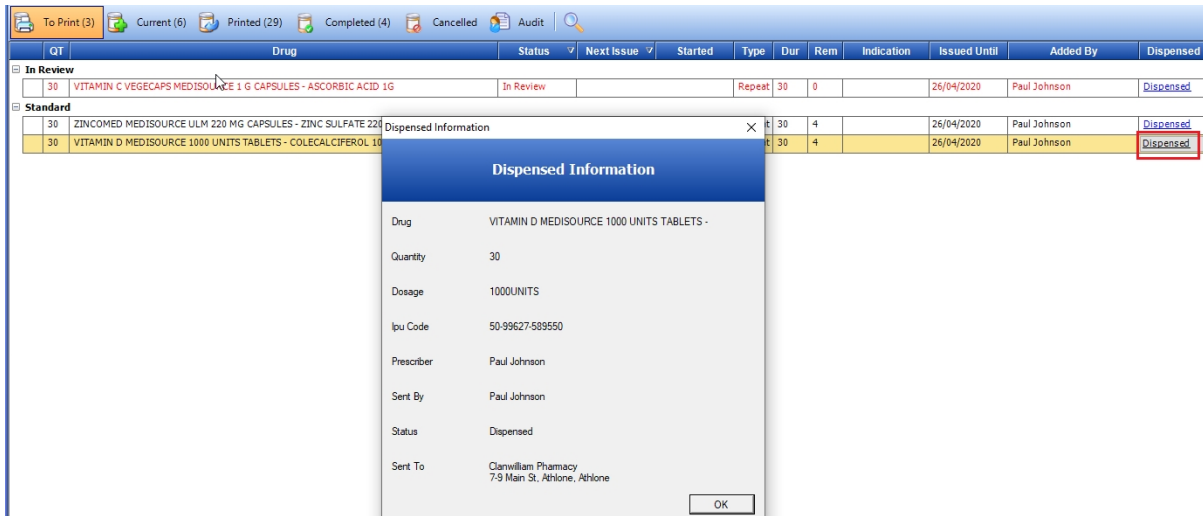
### 1.3 Prescriptions

When logged in as an admin / nurse, you can select the doctor to send the eScript on behalf of.

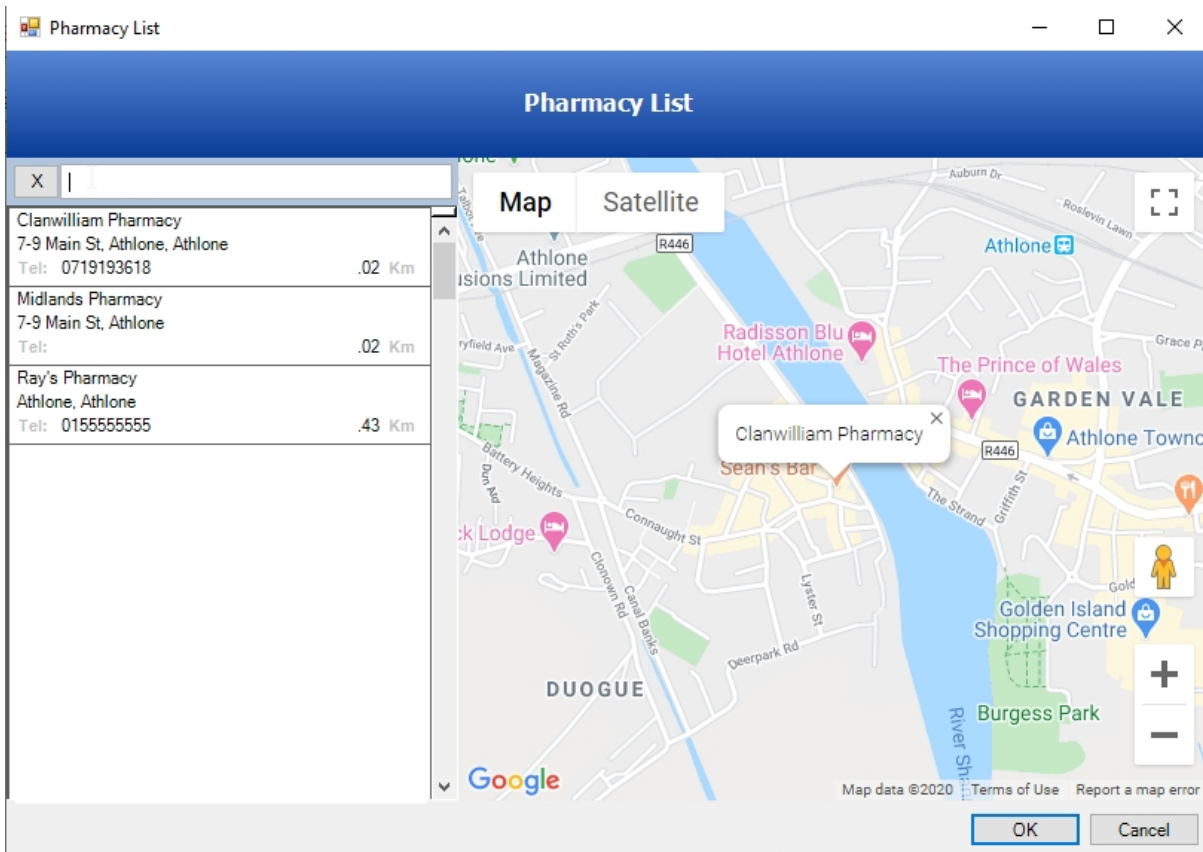
Nominated Pharmacy will be displayed if the patient has had an eScript sent for them previously. If not you can select the Pharmacy after clicking Print.



A hyperlink has been added to Dispensed Status so you can view further details on the escript.



Pharmacy Map updated so it now loading correctly. Ensure the practice GPS Co-ordinates are added in Control Panel > Admin Console > Practice.



## 1.4 Healthlink

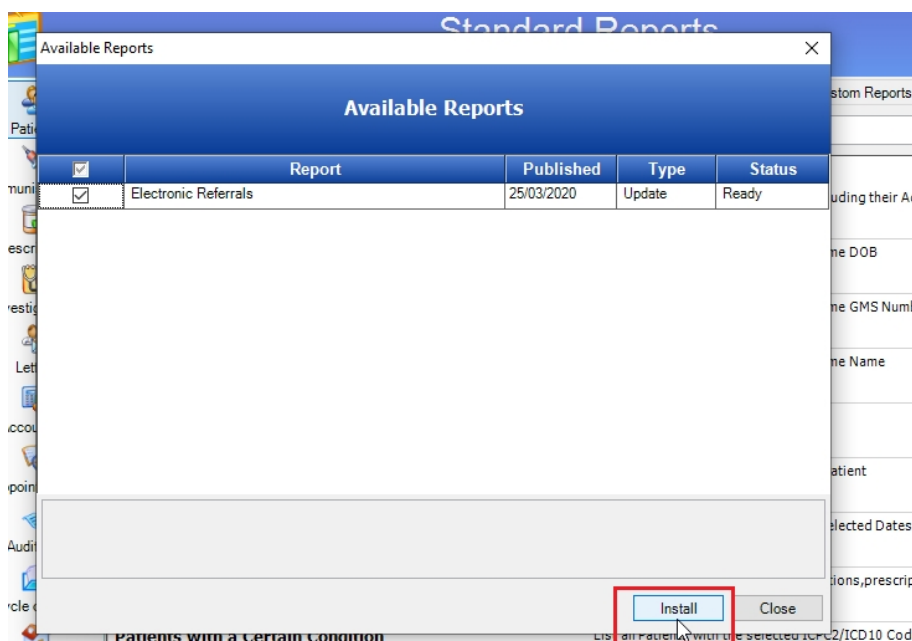
Eircode (if available) is sent in eReferrals and Radiology orders.

## 2 Reports

It is important to check for updates to your reports and to download the latest updates.



Click Update Available. Select all the reports and Click **Install**.



- Updated filters added to the Electronic Referrals report.

### 3 Bugs / Tasks

- The option to select Irish as a First Language is now available when completing an eReferral.
- CDM Disease Assessment Scoring item COPD Dyspnoea has been renamed to ‘mMRC Dyspnoea Score’.
- Importing Healthmail attachments has been updated so only one synchronisation can occur at a given time to prevent errors when importing.
- Claim Tracking grid has been updated to allow the columns to be sorted.
- Claim Tracking for eCert claims is now only showing the most recent rejection for the eCert claim.
- ID sent in the eCert Claim to the department has been extended to include the millisecond to avoid duplicate control id rejected message.

## 4 Appendix - Bank of Ireland Payment Acceptance (BOIPA)

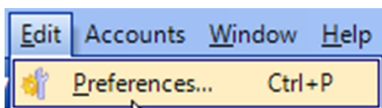
Bank of Ireland Payment Acceptance (BOIPA) has been integrated into Socrates to allow users take Card payments using the Card Terminal 'Lane 5000' from within Socrates. **Contact Bank of Ireland for details of how to sign up.**

Once the Bank Of Ireland engineer completes the installation of the Card Terminal and associated BOIPA Link software, the BOIPA Device preference must be enabled in Socrates.

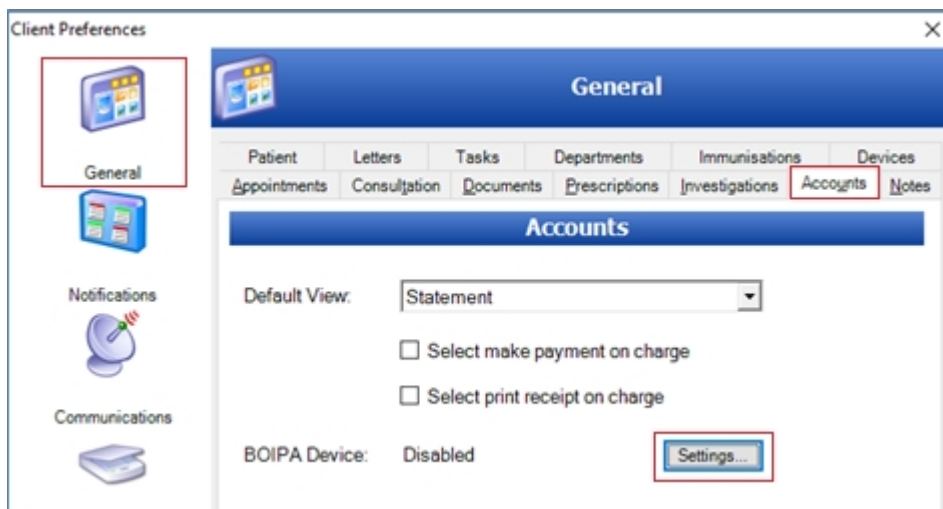
### 4.1 Socrates Setup

#### 4.1.1 Enable BOIPA Device

In Socrates open *Edit -> Preferences*



In General, select the Accounts tab and click **Settings** for BOIPA Device.



Select checkbox to confirm device is attached.

Select the **Receipt Printer** for Card receipts and select the Card **receipt template**.

BOIPA Device settings

Device Attached

Hostname: localhost

Port: 10000

Receipt Printer: HP LaserJet 3390 / 3392 PCL5

Receipt Template: A6Receipt.mrt

Receipt Location: C:\BOIPA\

OK Cancel

Click Ok when finished.

## 4.1.2 Account Type Setup

### 4.1.2.1 Payment

When BOIPA has been enabled the Payment Type must be created or updated to include Card Transaction. Open My Control Panel -> Admin Console -> System Types -> Account Types.

Name: Card Payment

Amount: 0.00

Account Type: Payment  Card Transaction

Active Save Clear

Move Up Move Down To Top To Bottom Print List Show Inactive Filter Payment

| Name   |
|--------|
| Cheque |
| Cash   |

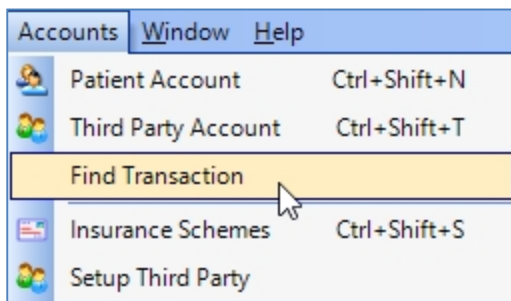
- Enter the name of the Payment Type (if creating a new type).
- Select Payment as the Account Type and select **Card Transaction** and click Save.

### 4.1.2.2 Strike Off

A StrikeOff account type can also be create to allow Card Refunds. Open My Control Panel > Admin Console > System Types > Account Types.

- Enter the name of the Refund/Strike Off Type.
- Select StrikeOff as the Account Type and select **Card Transaction** and click Save.

Transactions completed using the BOIPA will have an Authorisation Code which is displayed on the Customer Card Receipt. This Authorisation Code can be used to find the Card Payment Transaction in Socrates.



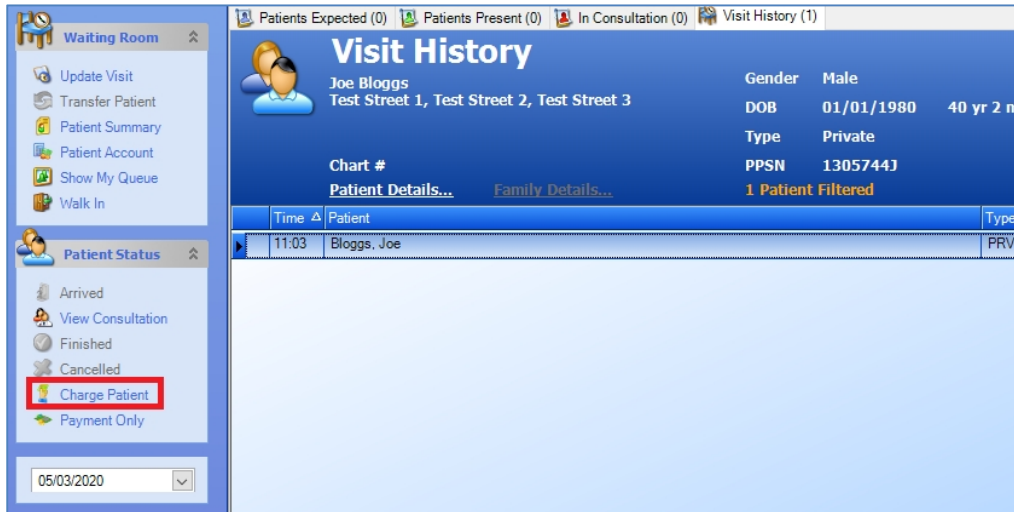
Enter e.g. Auth Code and click Search.

| ID  | Date       | From          | To Account    | Type                 | Taken By    | Amount |
|-----|------------|---------------|---------------|----------------------|-------------|--------|
| 431 | 04/03/2020 | Bloggs, Garry | Bloggs, Garry | Credit Card Terminal | Doctor Test | 5.00   |

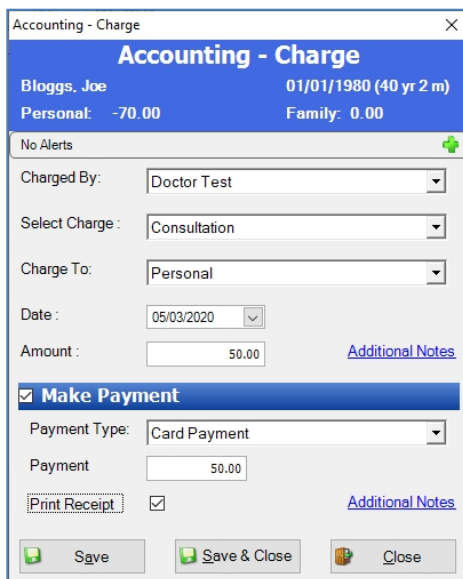
## 4.2 How to use the BOIPA Card Terminal in Socrates

### 4.2.1 Card Transaction

Example: Taking a Payment from Waiting Room.

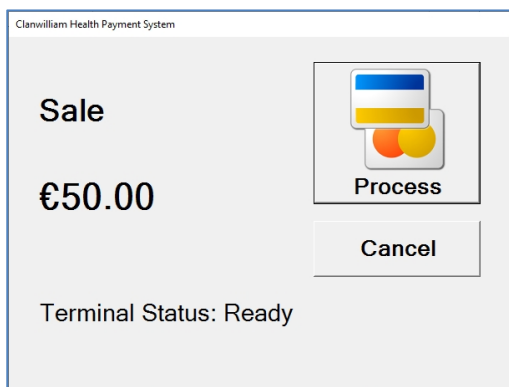


Highlight Patient and click **Charge Patient** to record a charge for the patient visit.

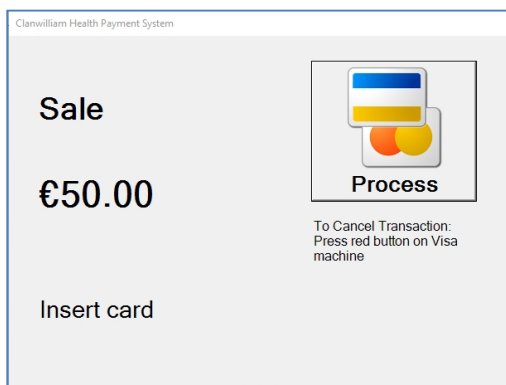


Enter the Amount and Select **Make Payment**. Select the Payment Type that has been created for Card Transactions. Select Print Receipt. Click Save and Close.

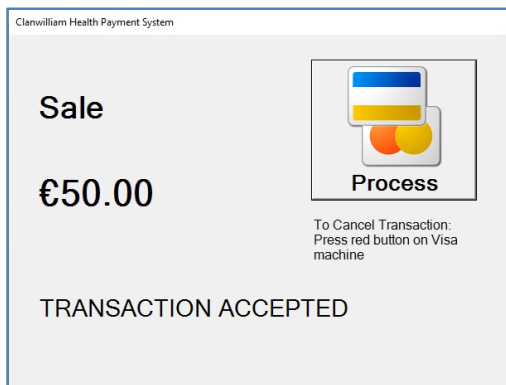
The Card Transaction window will be displayed.



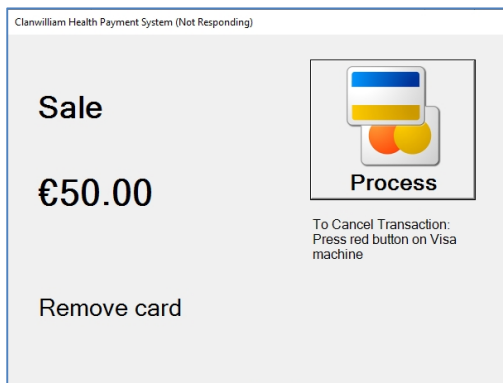
Click **Process** to proceed with the transaction.



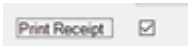
Insert the Card and enter the PIN or Tap Card on Terminal. The Payment will be processed



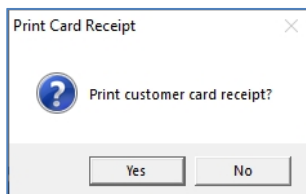
Advise customer to remove their card.



The default Socrates receipt will be printed if Print Receipt is checked on the Make Payment window.

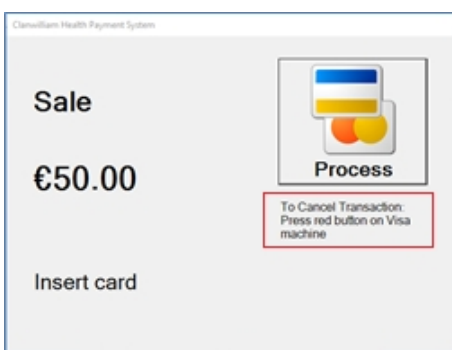


User will be asked do they want to print a Card Receipt for the Patient. Click Yes to print the Card Receipt.

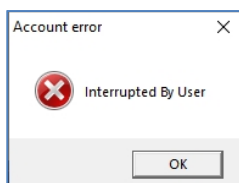


#### 4.2.2 Cancel Card Transaction

If for any reason you want to cancel the Card Transaction from the Insert Card window e.g. an incorrect amount was entered then press the red button on the terminal.

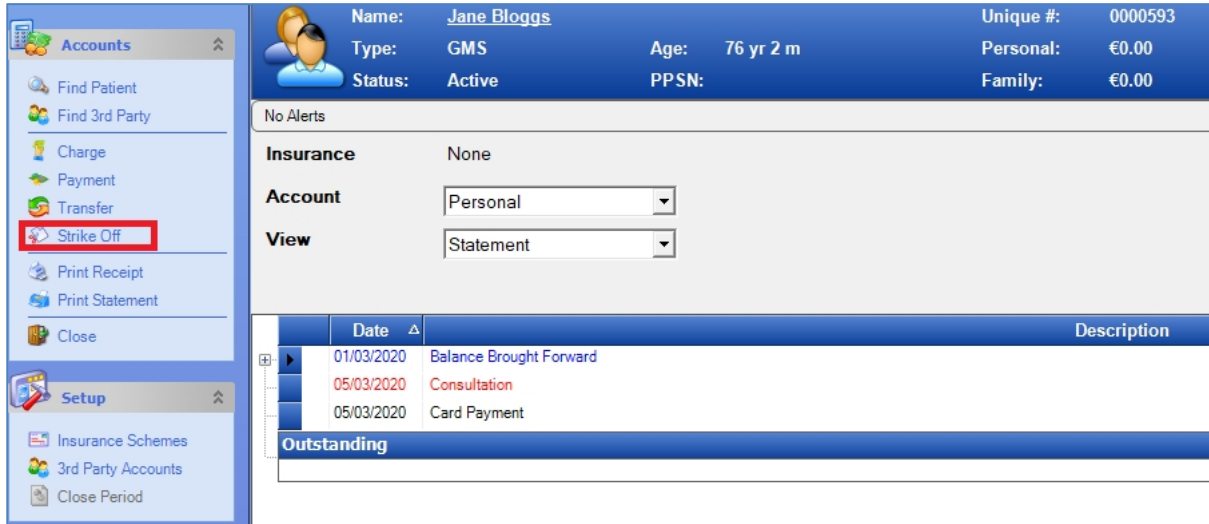


Transaction will be cancelled and the following message will be displayed. Click OK to return to the Accounting Charge window.

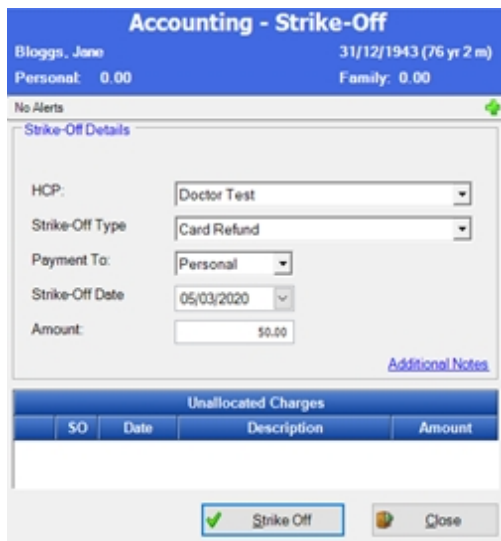


### 4.2.3 Card Refund

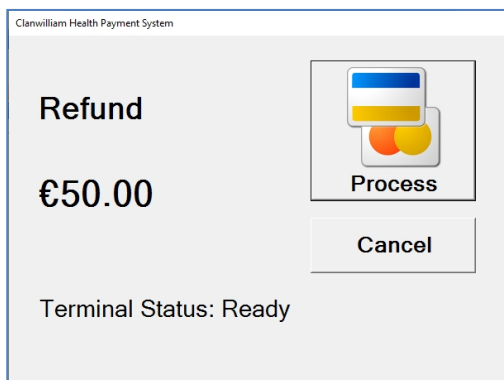
Example: Refunding from Patient Accounts. Click Strike Off.



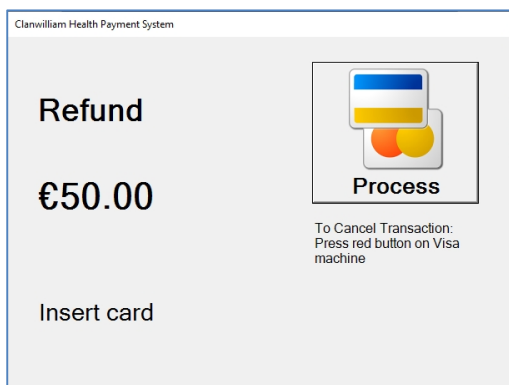
Enter the Amount and Click Strike Off.



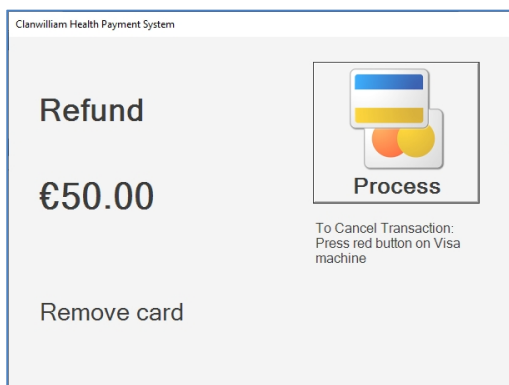
The Card Transaction window will be displayed.



Click **Process** to proceed with the refund transaction.

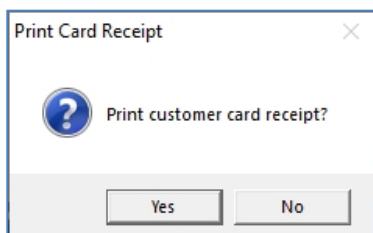


Insert the Card and request Patient to enter the PIN or Tap Card on Terminal.



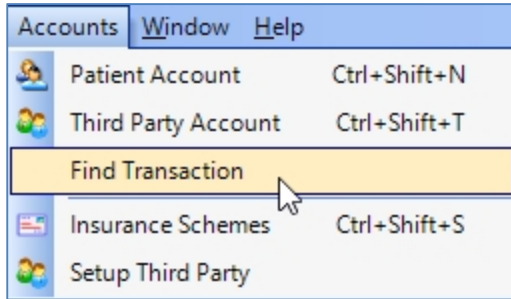
The Refund will be processed.

User will be asked do they want to print a Card Receipt for the Patient. Click Yes to print the Card Receipt.

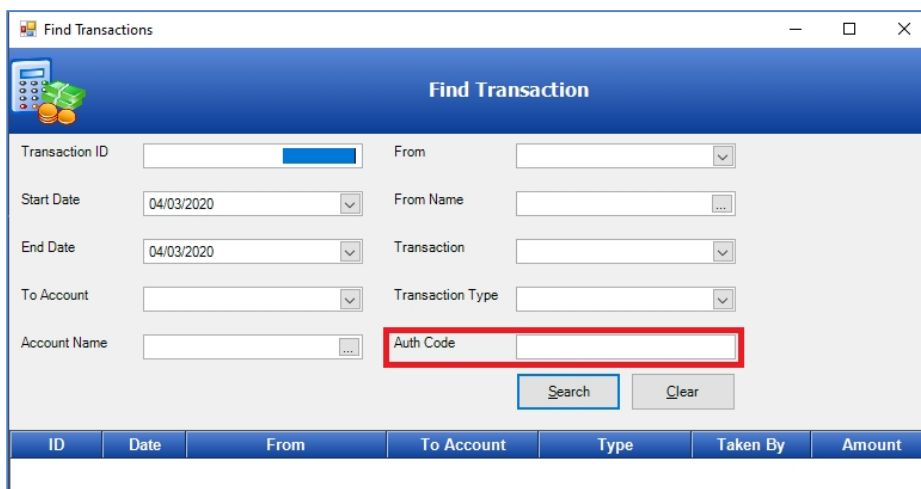


### 4.2.4 Find Transaction

To find a Transaction using the Auth Code open Accounts menu and select Find Transaction.



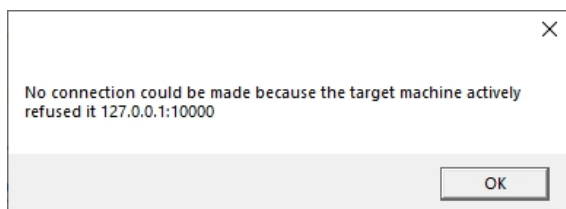
Enter e.g. Auth Code and click Search.



### 4.2.5 Troubleshooting

- **No Connection Error**

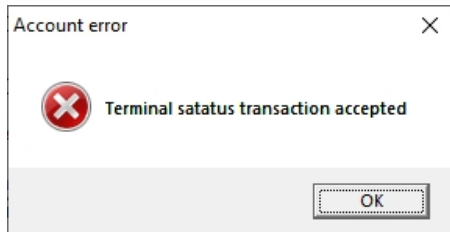
When BOIPA is not running in the system tray an error will be displayed when user tries to process a payment.



**Solution:** Run the Boipa Link icon on the desktop.

- **Error message displayed when Terminal Unplugged**

If BOIPA service is running in system tray but the terminal is unplugged the following error will be displayed when a transaction tries to run.



Transaction error message displayed when clicking Process.

**Solution:** Check Diagnostics of Terminal. Right Click icon in system tray.