socrates

Socrates GP v2.8.0.1 Update User Manual July 2021

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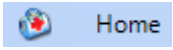
Socrates Message

This update manual documents the updates that have been made to Socrates GP in release version 2.7.9.3 to 2.8.0.1. This release includes access to the Secure PCRS Eligibility checker, a new online payment integration called Billink Payments and some improvements to Chronic Disease Management.

All training materials i.e. Quick Guides, Frequently Asked Questions'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. For all other queries please email: support@clanwilliamhealth.com.

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

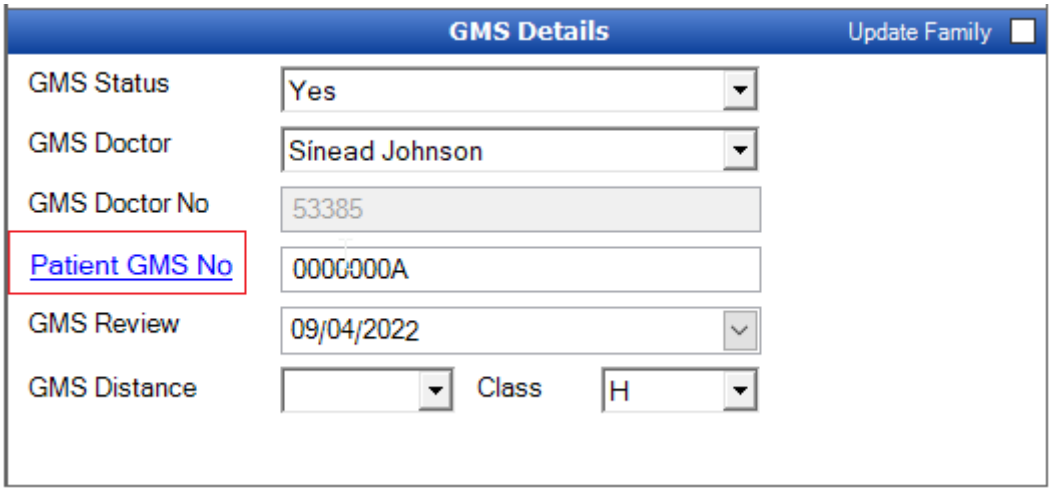
Regards

Socrates Team, Clanwilliam Health

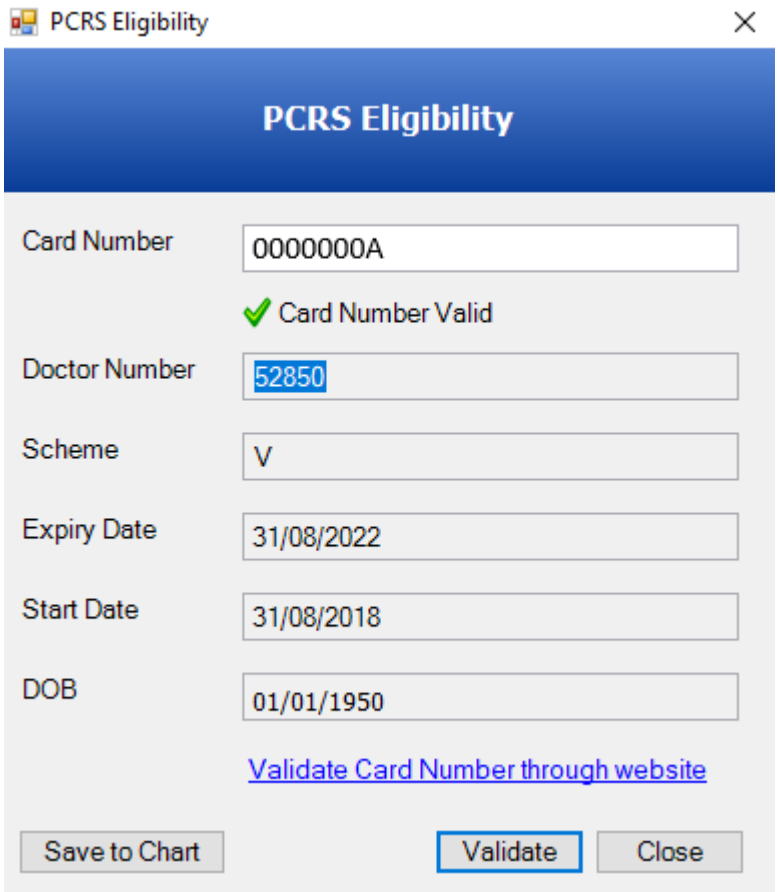
1 Patient Maintenance

PCRS Eligibility Checker

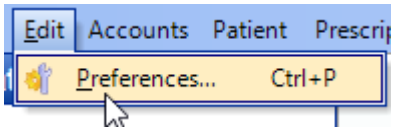
A valid PCRS Cert is required to use the PCRS Eligibility checker in Socrates.



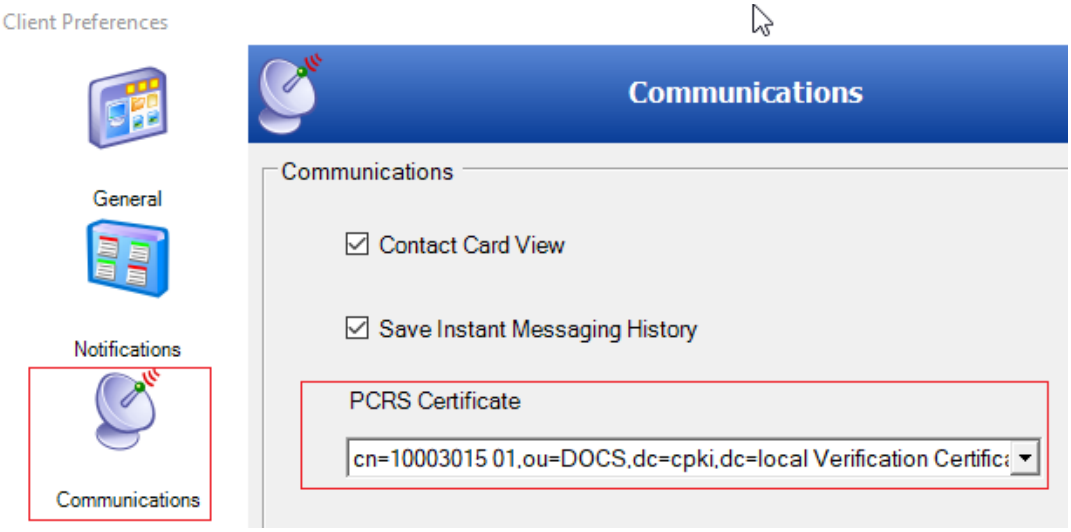
A valid PCRS Cert is also required to use the Validate through website link on the PCRS Eligibility window.



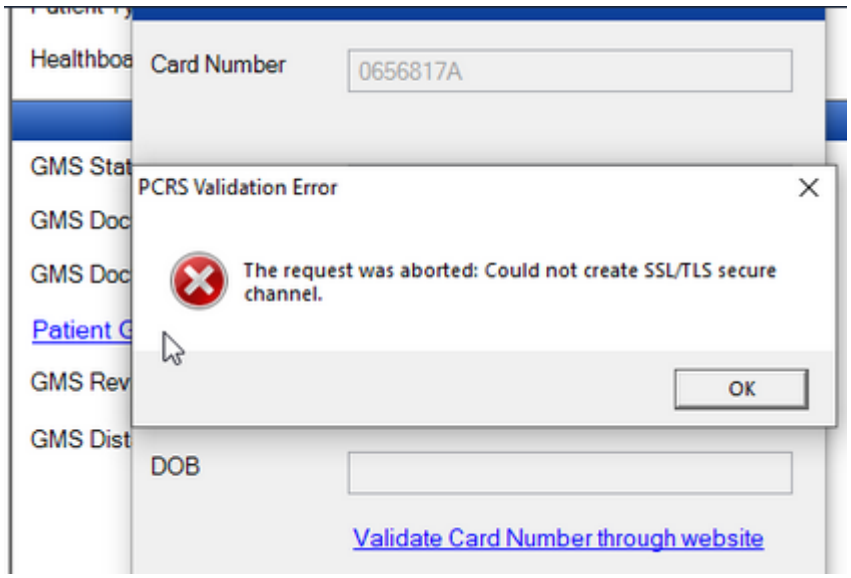
From the main menu in Socrates, select Edit > Preferences.



Select Communication and select the PCRS cert from the dropdown list and click Save. If there are no PCRS certs displayed in the dropdown list then please contact PCRS and install a PCRS cert into your Cert Store.



If you try to use the PCRS checker without a valid cert selected in Edit > Preferences you will receive this error.



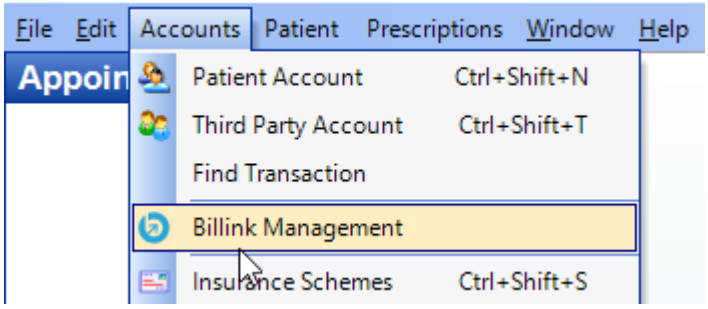
2 Accounts

Billink Payments

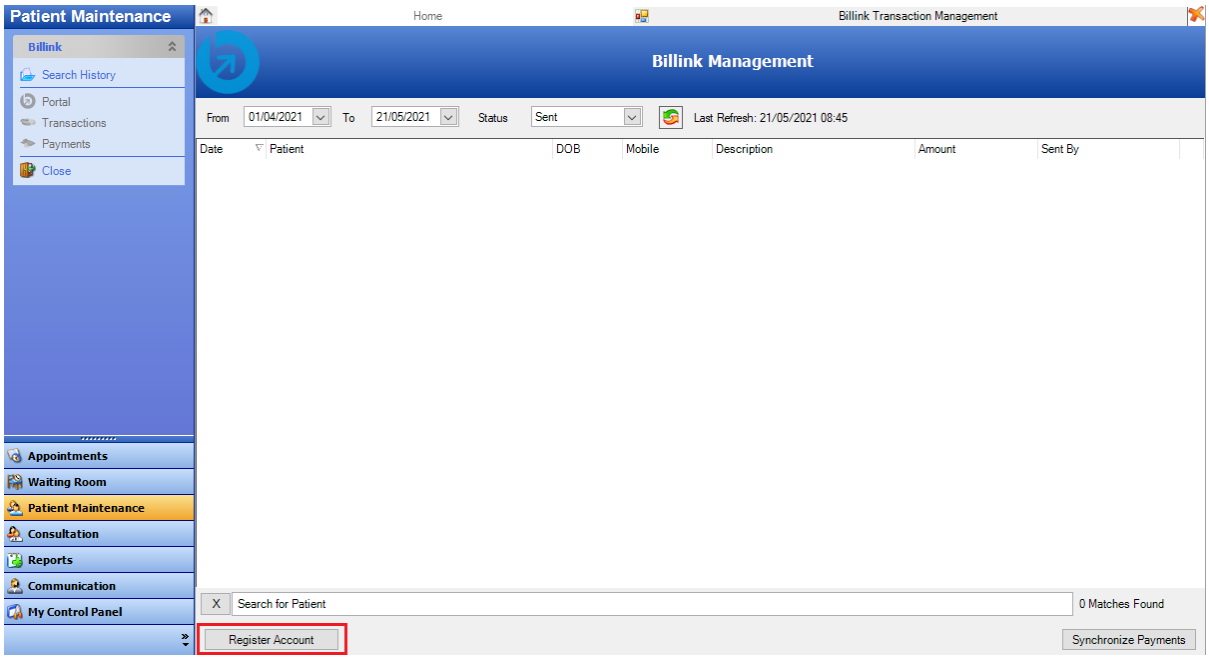
Practices who register with Billink can send an online payment link to the patients mobile number. The patient can click this link and complete the payment online. The practice can view all payment requests and their status in Socrates. Online payments processed by Billink will show as payments in the patients chart. For more information please visit the Billink website at: https://billinkpayments.com or email: contact@billinksupport.com

Billink Registration

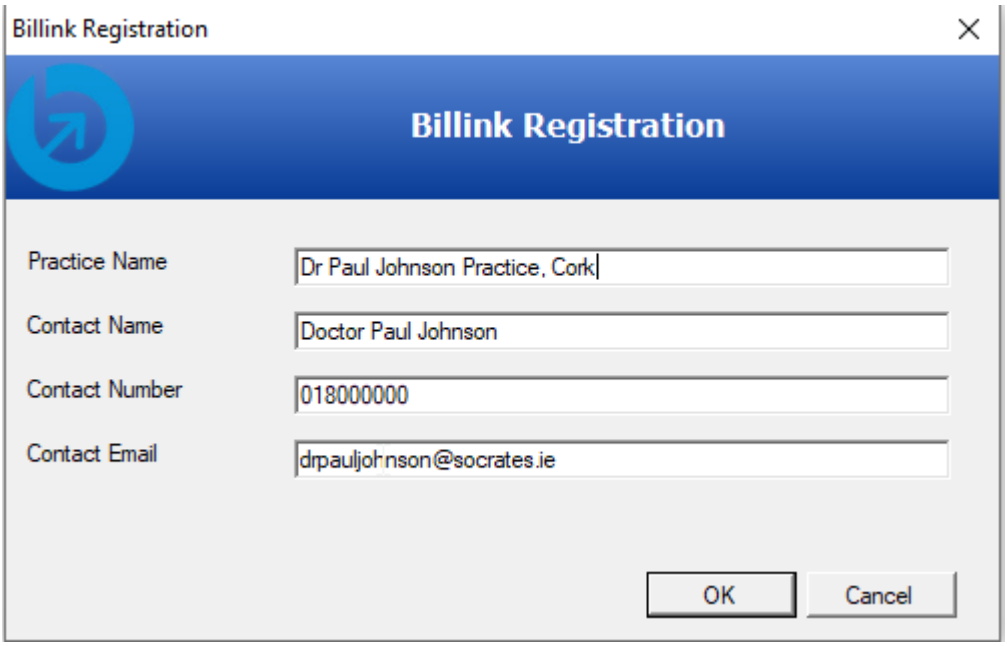
Once Billink has been enabled you will see the **Billink** button on the top menu bar and the **Billink Management** menu item in the Accounts main menu.



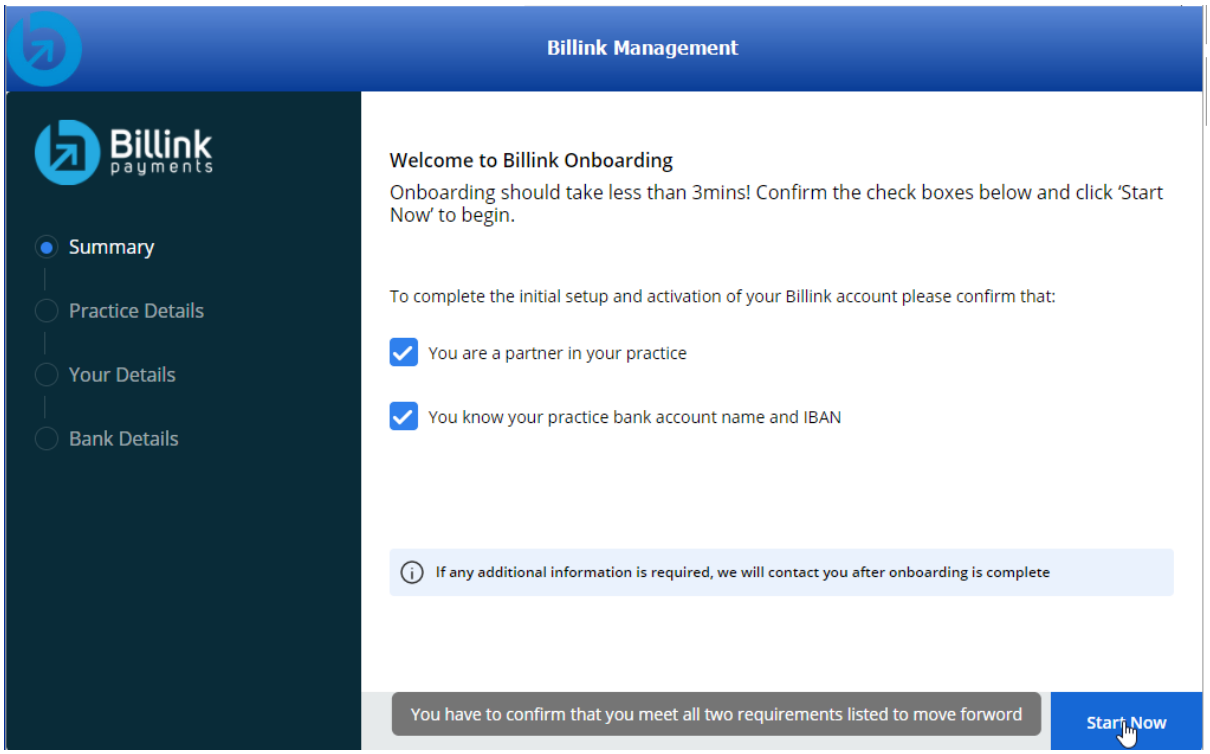
If you open Billink Management from the Accounts menu, click **Register Account** button to create a Billink account.



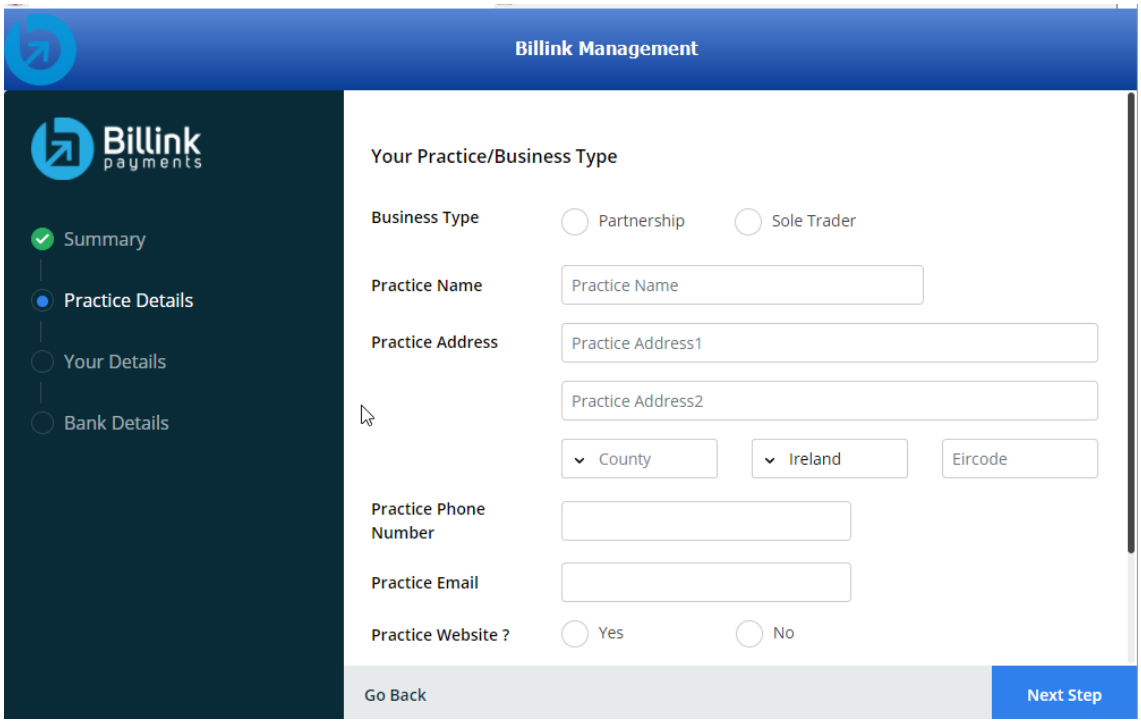
From the Billink button on the main menu, the registration screen will be displayed. Enter your Practice details and click OK.



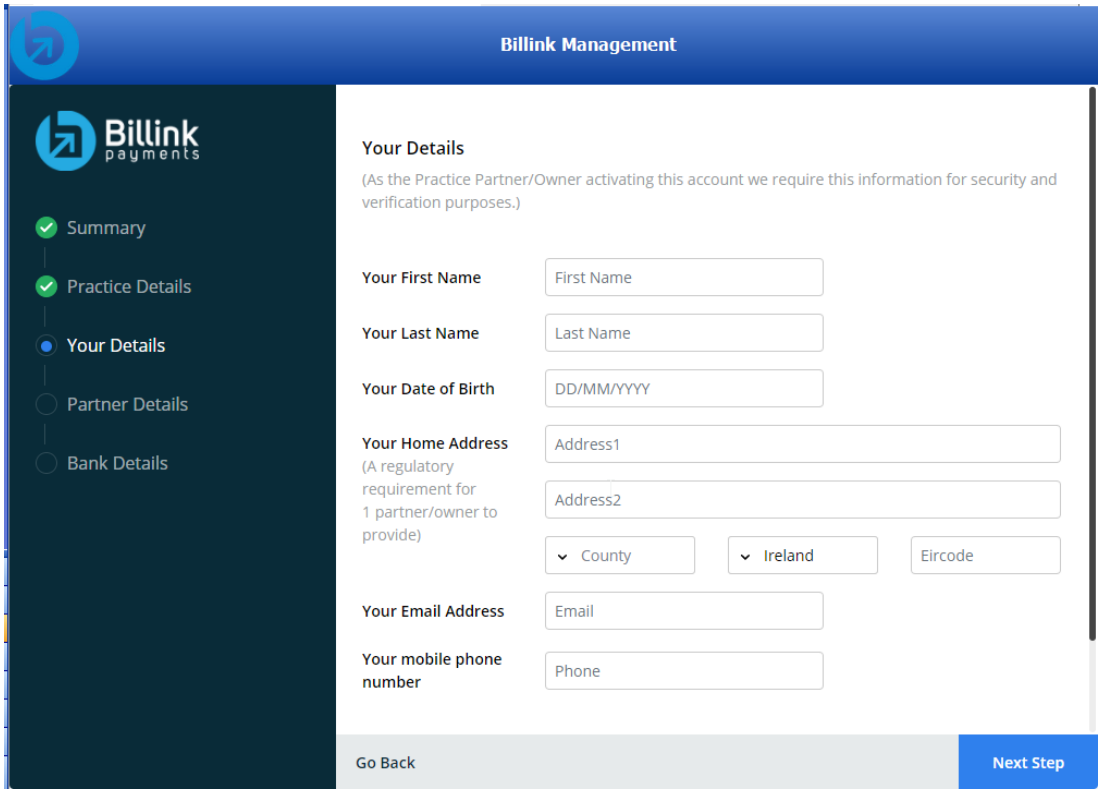
Complete the Billink registration form to sign up with Billink. Confirm you are a partner in the practice and you have the Practice bank account details ready to begin.



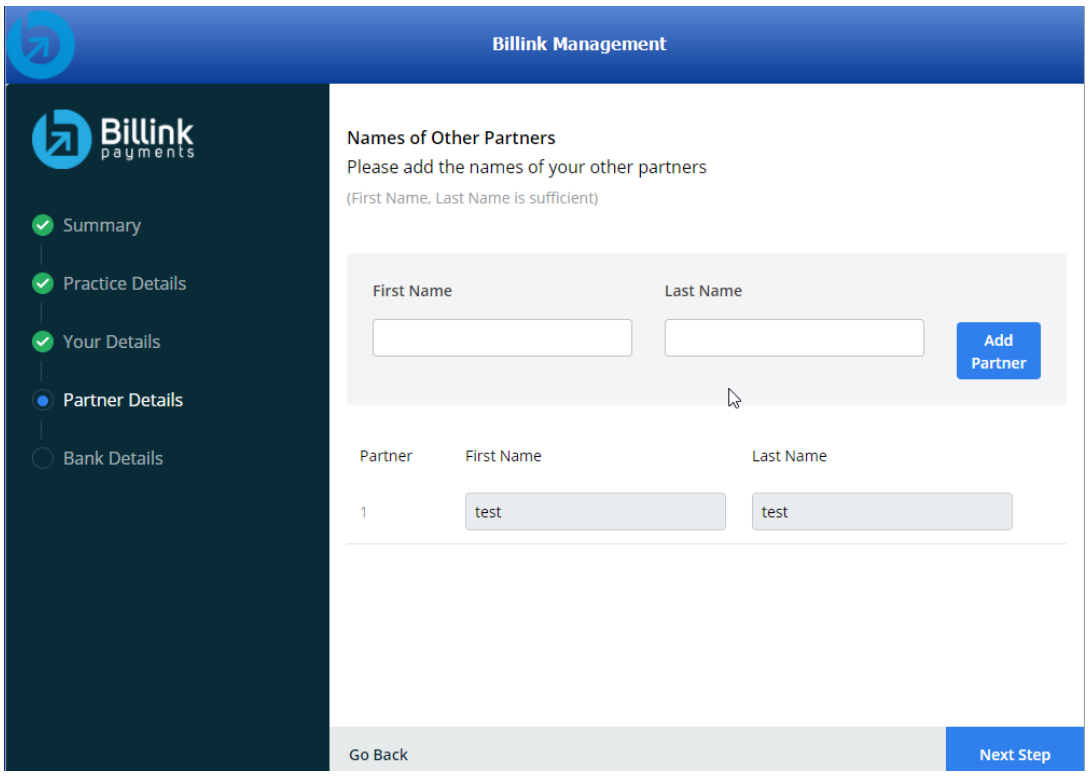
Enter the required details and click **Next Step**.



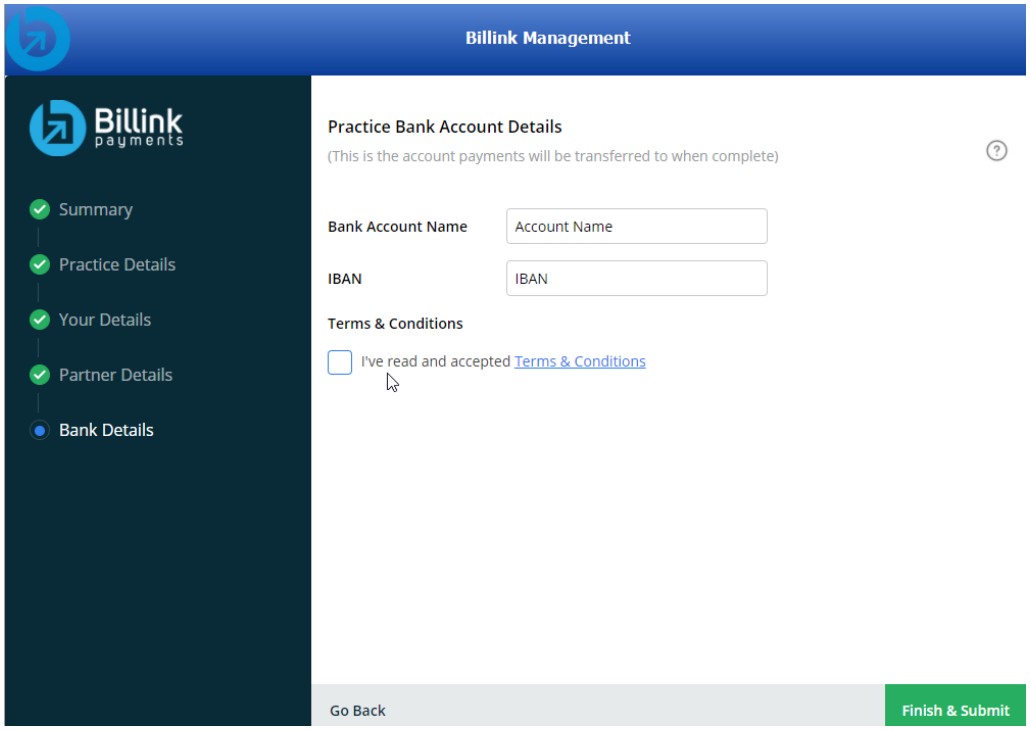
Enter the required details and click **Next Step**.



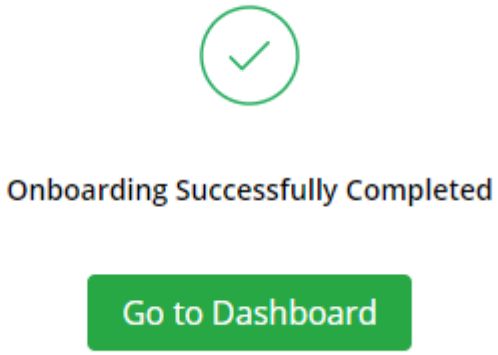
If you chose Partner then you will need to fill out details of all partners.



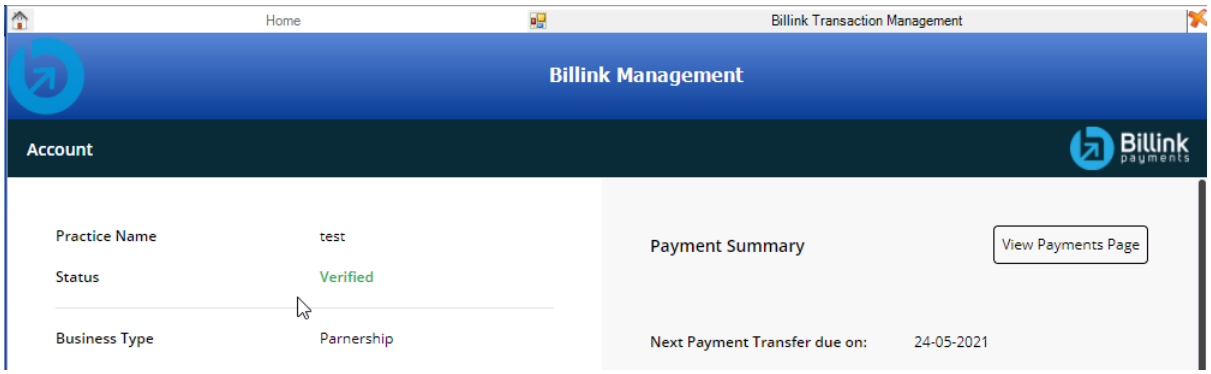
Read the Terms & Conditions and confirm if you agree, enter your bank account details and click Finish & Submit.



Once the Billink registration is complete you will receive a confirmation message. Clicking **Go to Dashboard** will open the Billink Portal.

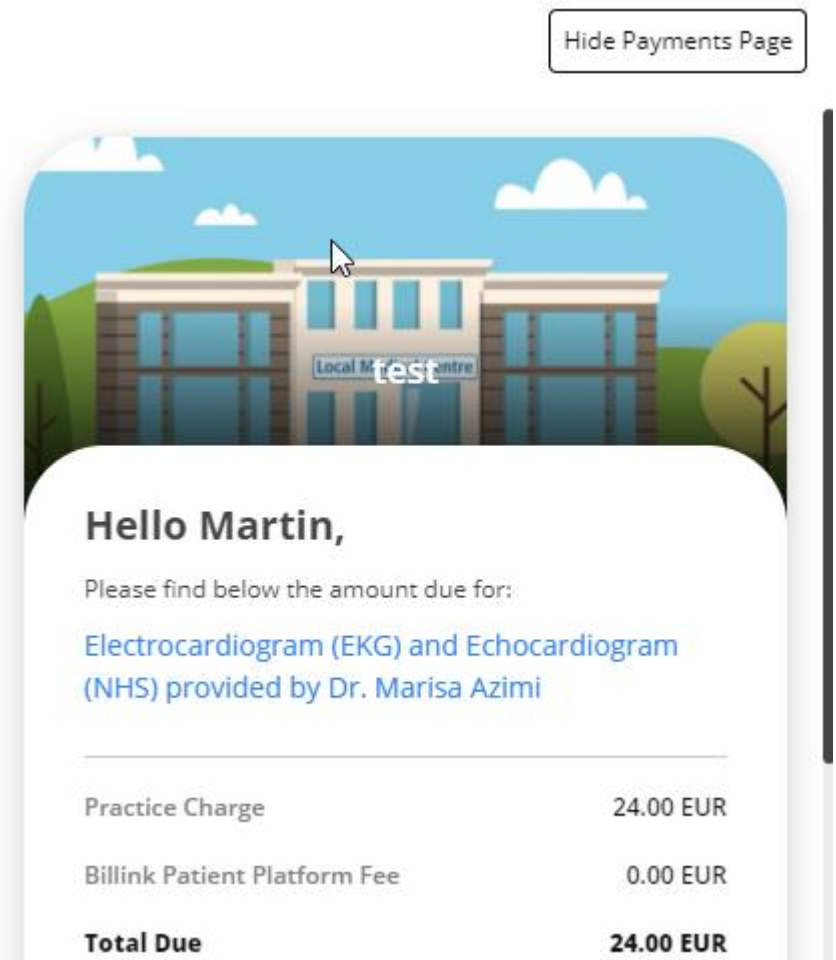


Here you will see all the information you have added during the Billink registration process.

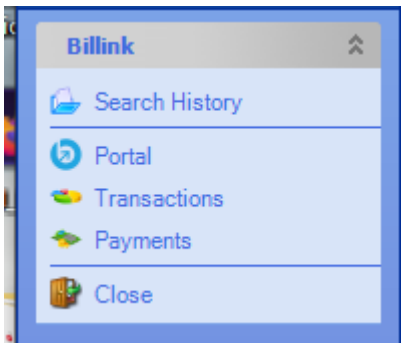


You can add your own **Practice Image** and when you send a payment request to a patient, your image will appear at the top of the request. Click X to remove the template image and drag and drop your new image.

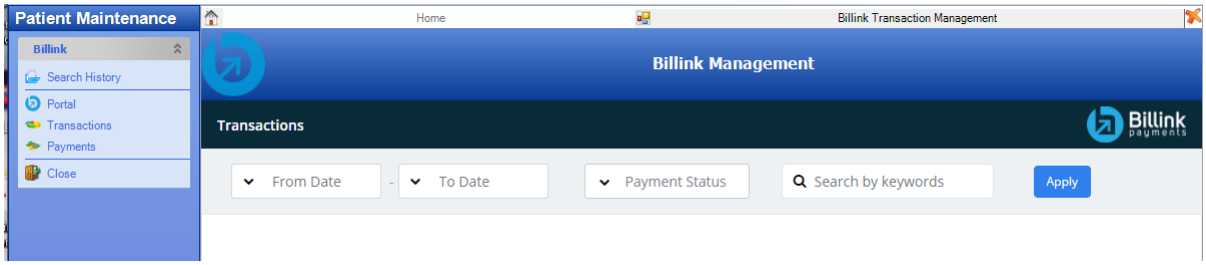
Click View Payments Page to view a preview of how the payment request link will look for the patient.



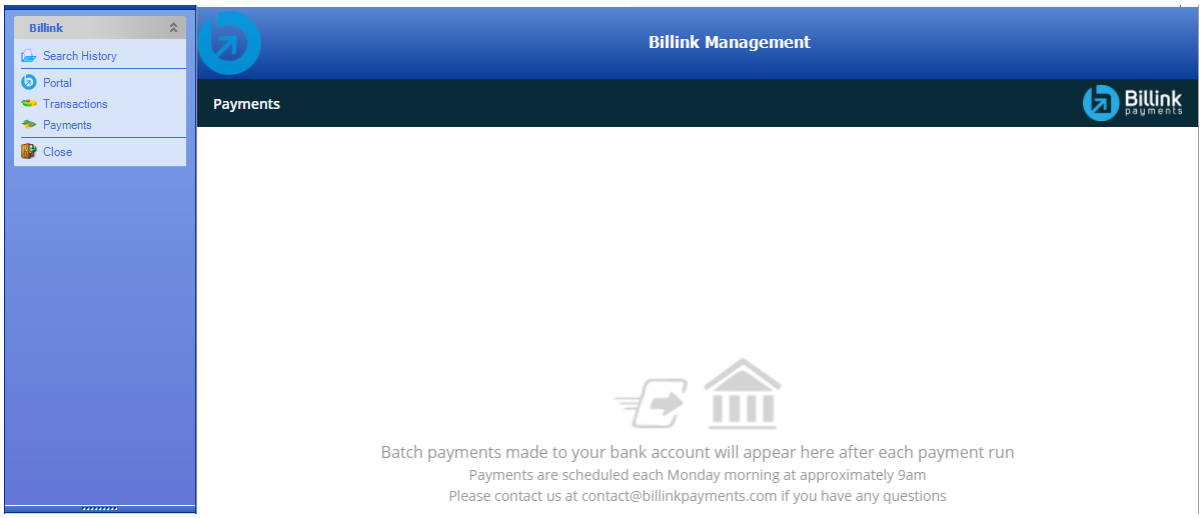
You can open the Billink Portal at any time by using the left hand explorer menu.



Billink Transactions will show all Billink payment transactions you have requested from Socrates and their status.

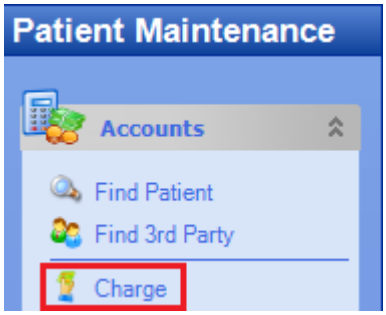


Billink Payments will show all batch payments made from Billink into the bank account entered at Billink registration.

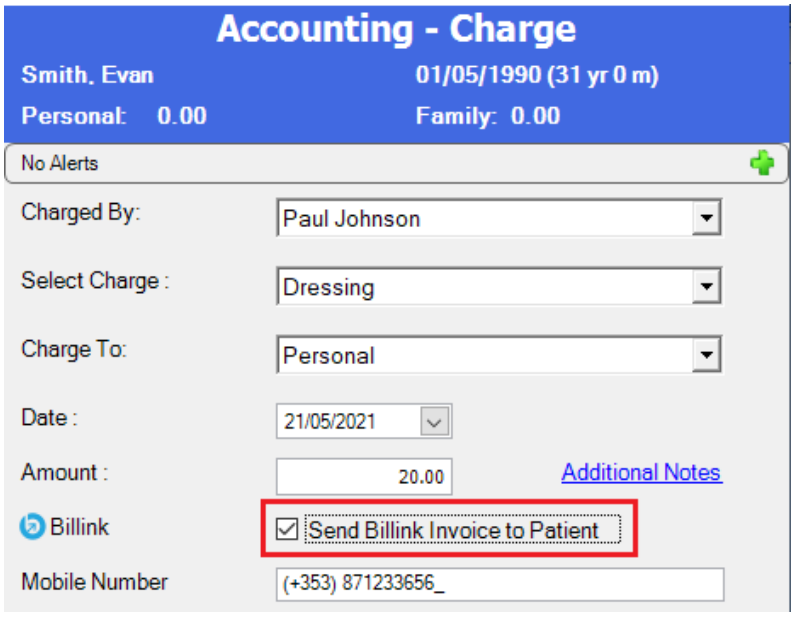


Payment Request

Select a patient from the waiting room or open the patients account and click **Charge** to send a Billink payment request.

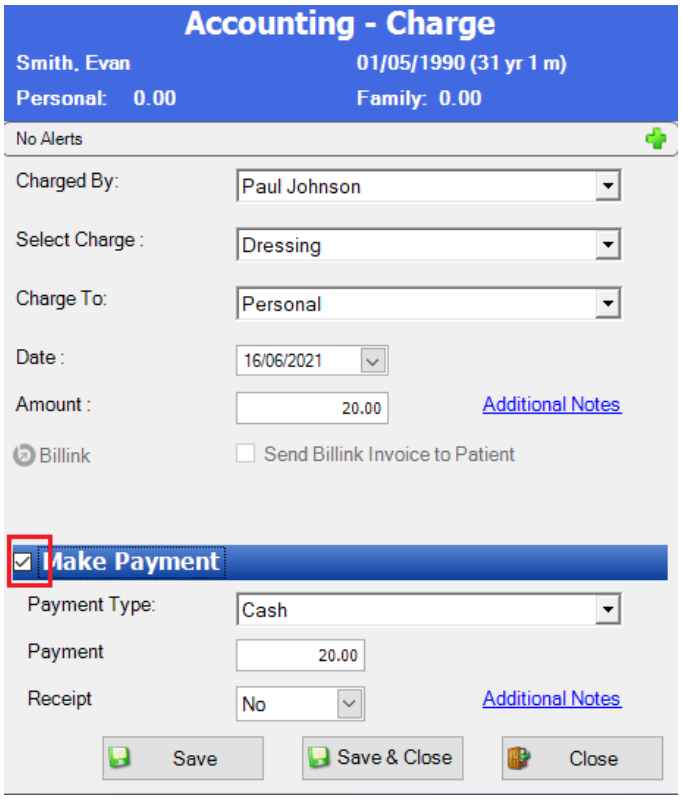


Enter the details of the charge and check 'Send Billink Invoice to Patient'. Ensure patients mobile number is correct and click Save & Close.



Any additional notes added will be sent with the Billink Payment request to a maximum of 300 characters (which will include the charge description)**.**

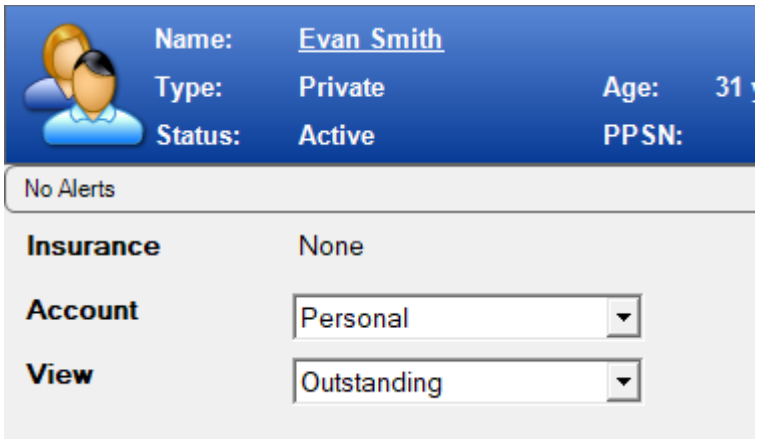
Note: If you have 'Make Payment' checked by default preference selected then you need to uncheck 'Make Payment' on the Charge window for Billink to be enabled.



Outstanding Charge(s) / Multiple Charges

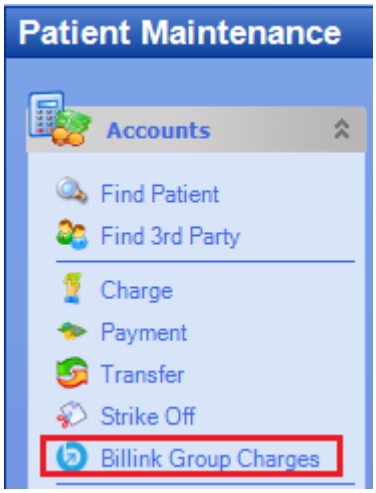
If the patient has an existing outstanding charge or you want to request payment for multiple charges then open the Patient Account.

Filter dropdown to **Outstanding** to view all outstanding charges.

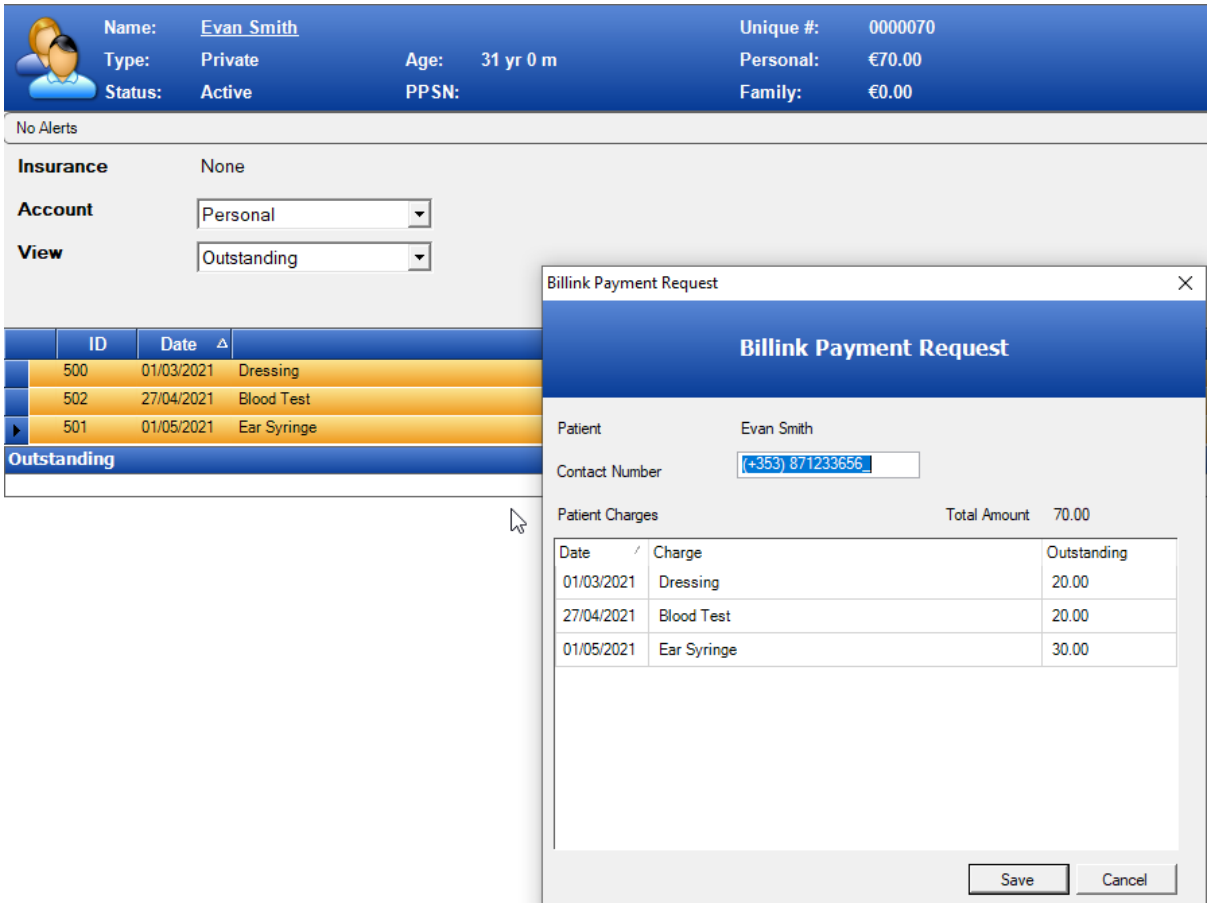


Select the outstanding charge(s) from the patients account and click 'Billink Group Charges' from the left hand menu.

Select the outstanding charge(s) that you want to request payment for and click **Billink Group Charge.**



Ensure the patients mobile number is correct and click **Save**.



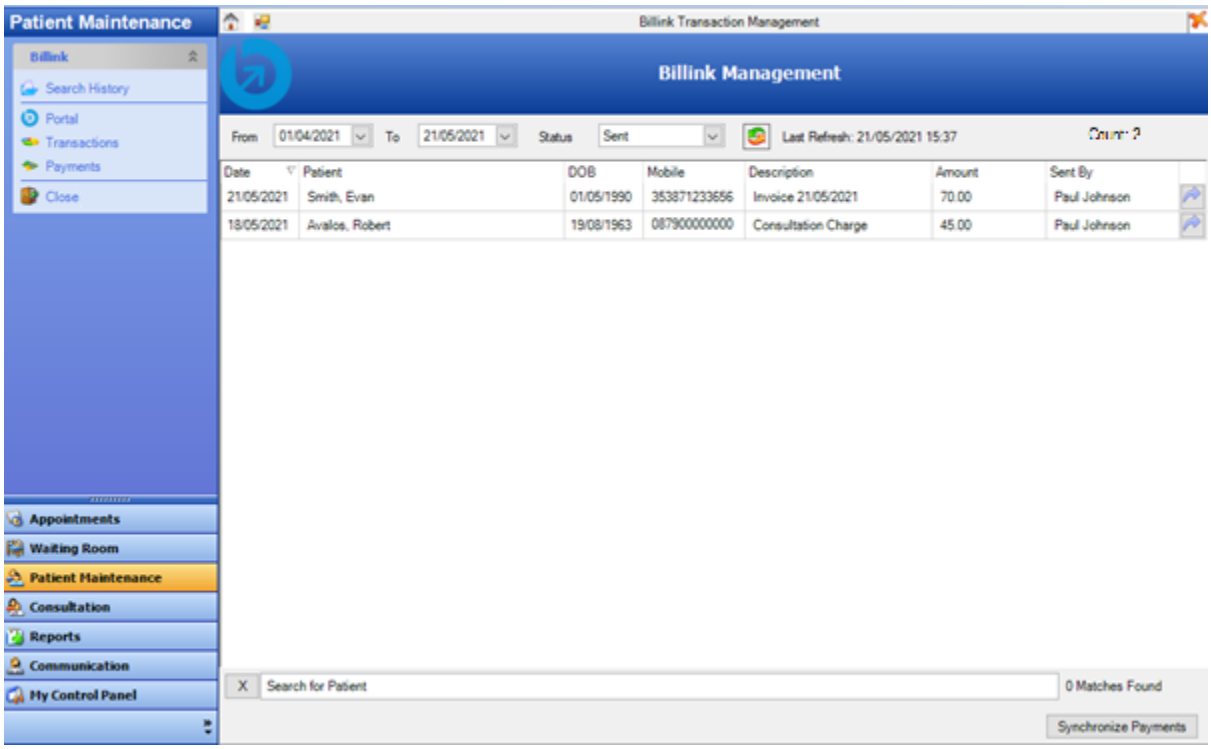
Family Accounts

If you want to send a payment request for outstanding charges to the head of a family then ensure you open the patient accounts for the Head of the family, then select the outstanding charges and click **Billink Group Charges** on the left hand menu.

Search History

To view the status of all payment requests select **Billink** icon from main menu or **Accounts** > **Billink Management**.

Search History is loaded by default. Count of number of transactions is displayed on the top right of the screen.



Use filters to view transactions by status.

- **Sent** – Payment request sent via Billink to Patient.
- **Paid -** Payment request sent via Billink has been paid by the Patient.
- **Cancelled** – Payment request sent via Billink has been cancelled. If Patient clicks the link in the sms message, they will be advised the request has been cancelled.
- **Refunded** – Payment request sent via Billink has been paid by the Patient and the Practice has subsequently refunded the payment on the Billink Portal.

Click Refresh button

to show any new payment requests added in Socrates.

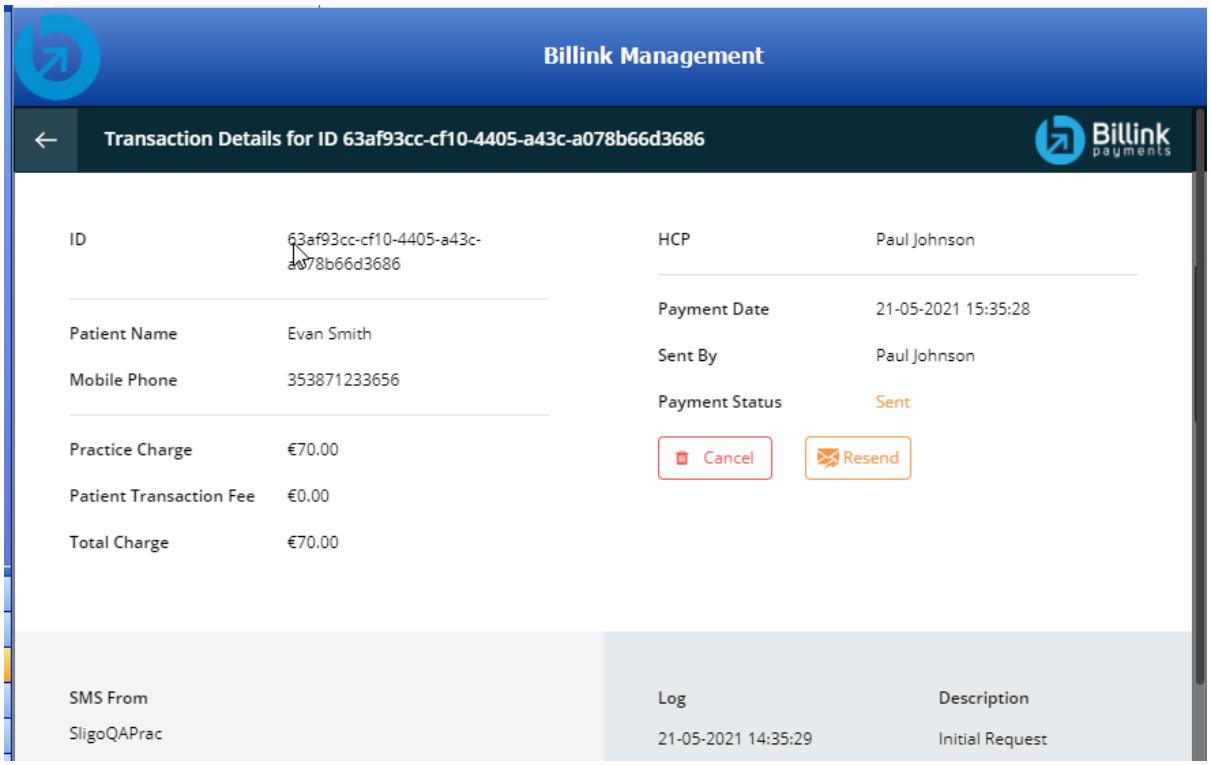
Click **Synchronize Payments** button to update the status of the transactions in Search History with any recent Billink payments, refunds or cancellations. A check is completed for any Billink updates when the Billink window is opened or closed and re-opened.

Billink Portal

Click the arrow beside the Payment request to view further details on the Billink portal or to update the Billink request.

Date	Patient	DOB	Mobile	Description	Amount	Sent By
21/05/2021	Smith, Evan	01/05/1990	353871233656	Invoice 21/05/2021	70.00	Paul Johnson

Click **Resend** to resend the text message to the patient e.g. if the link has expired.

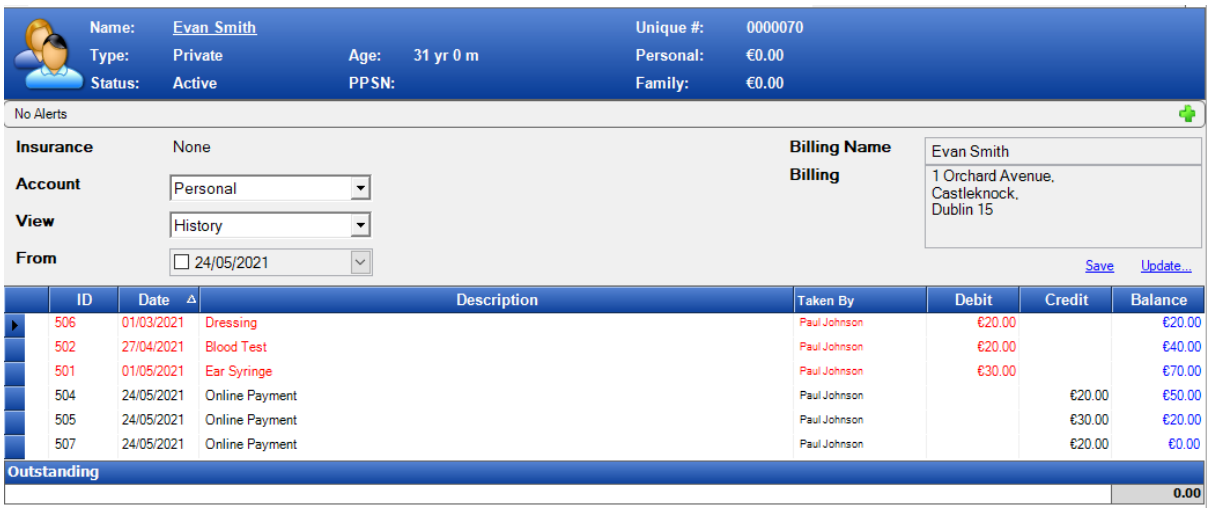


Should you need to cancel the payment request for any reason e.g. an incorrect mobile number was used or if the patient has paid for the bill in person then click **Cancel** to remove the payment request.

Once you click **Synchronise** on the Search History window or reopen the Billink window the status of the request will update.

Patients Account

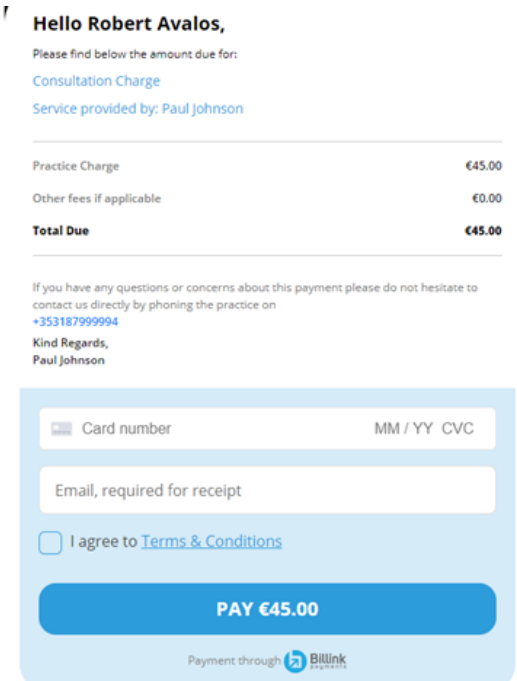
Once the payment has been received by Billink it will be automatically allocated to the outstanding charge. The payment description will be 'Online Payment'.



No updates will be made to the patients account if the Billink payment request has been cancelled or refunded. You must update the patients account as required.

Patient

Once the patient receives the text message, they can click on the link provided. This link will open the payment page in their default browser. They can enter their card details and click **Pay**.

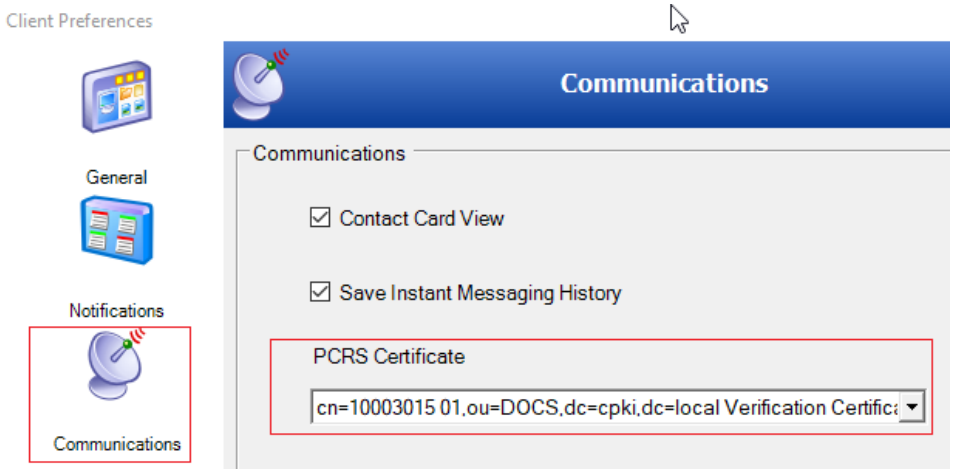


3 Consultation

Chronic Disease Management

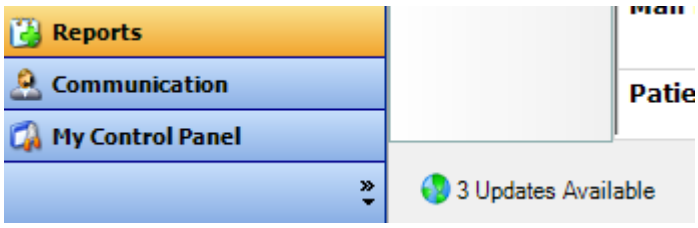
- You can edit the Reviewing doctor on a CDM review if the review is unsent or rejected by Healthlink e.g. Msh.10 error as the reviewing doctors MCN is not attached to the certificate.
- Extra validation added regarding age rules for CDM to ensure that the patient was the minimum age for any reviews added for a date in the past.
- Extra validation added to ensure Telephone Consultation checkbox is only visible for review dates where HSE are allowing telephone consultations.
- CDM reviews cannot be deleted if either the PCRS reimbursement message or the HSE clinical message has been accepted.
- PCRS Cert is required to check the GMS Number before adding a CDM review. You will receive the error message below if you have no PCRS Certificate. Ensure you have a valid PCRS cert in your Cert store. Contact PCRS for any PCRS Cert issues.

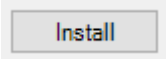
Once you have installed the valid cert, select Edit on the main menu in Socrates and select Preferences. Select Communication and select the PCRS Cert in the dropdown list and click Save.



4 Reports / Forms

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. 

And open Control Panel > Admin Console > Custom Forms and click **Search Online**.

- **Recent Report Updates:**
  - Mail Merge Patients Overdue an Immunisation Schedule
  - Prescription Refill Details
  - Attendance by Appointment Type

5 Bugs / Tasks

- **Control Panel > Admin Console**
  - If a user deactivates a shot focus moves to the next shot in the list so user can carry on and not lose their positioning.
  - Lab investigations mapped to a lab result can now be deactivated.