

# socrates

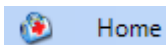
## 1. Socrates GP v2.8.4 Update User Manual April 2022

1. Notifications.....	2
2. Patient Maintenance.....	3
2.1. Patient Registration .....	3
2.2. Patient Group Alerts & Bulk SMS.....	3
3. Consultation.....	3
2.3. Consultation Summary.....	3
2.4. Prescriptions .....	6
2.5. Add Appointment.....	7
2.6. Immunisations.....	8
2.7. Chronic Disease Management .....	9
2.8. Fresubin Drug Alert.....	11
4. Reports / Forms .....	12
3.1. Report Updates .....	12
3.2. Forms .....	12
5. Control Panel.....	12
4.1. Result Viewer .....	12

### Socrates Message

*This manual documents the updates from release version 2.8.3 to 2.8.4 and includes updates to the Consultation screen, warning message when administering Children's booster / immunocompromised shots, updated Terms & Conditions together with some user requests.*

*All training materials i.e. Quick Guides, FAQ'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](mailto:cr@clanwilliamhealth.com). For all other queries please email: [support@clanwilliamhealth.com](mailto:support@clanwilliamhealth.com).*

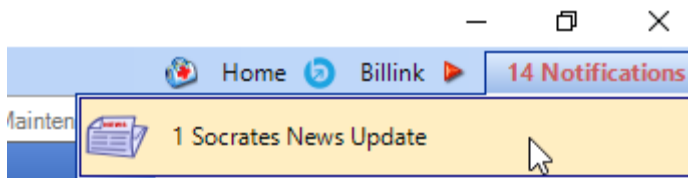
*We hope you continue to enjoy using our product and we look forward to receiving your feedback.*

*Regards*

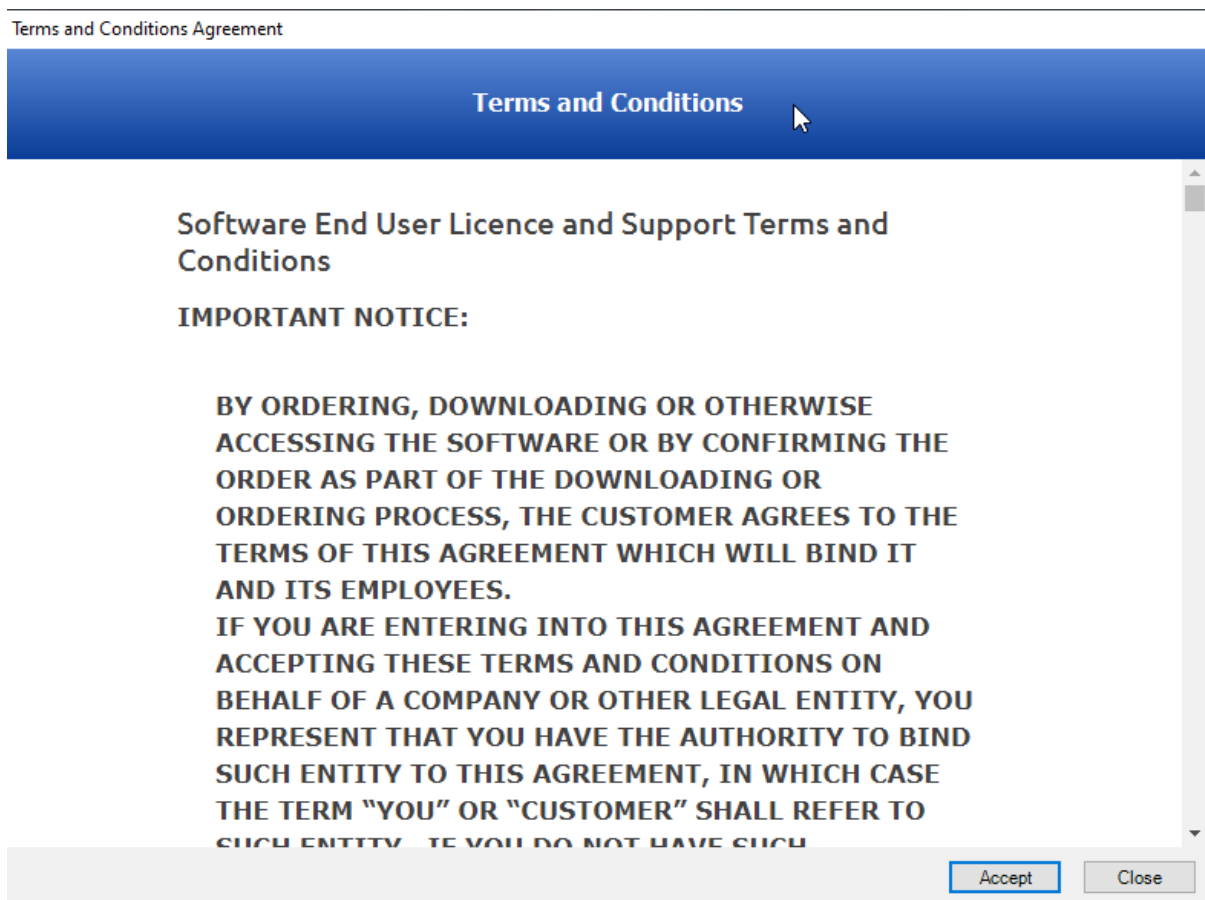
**Socrates Team, Clanwilliam Health**

## 1. Notifications

Open Socrates News Update in **Notifications** to view all important notifications that we send to you.



Please read through our updated Terms & Conditions and click **Accept** to confirm your agreement.



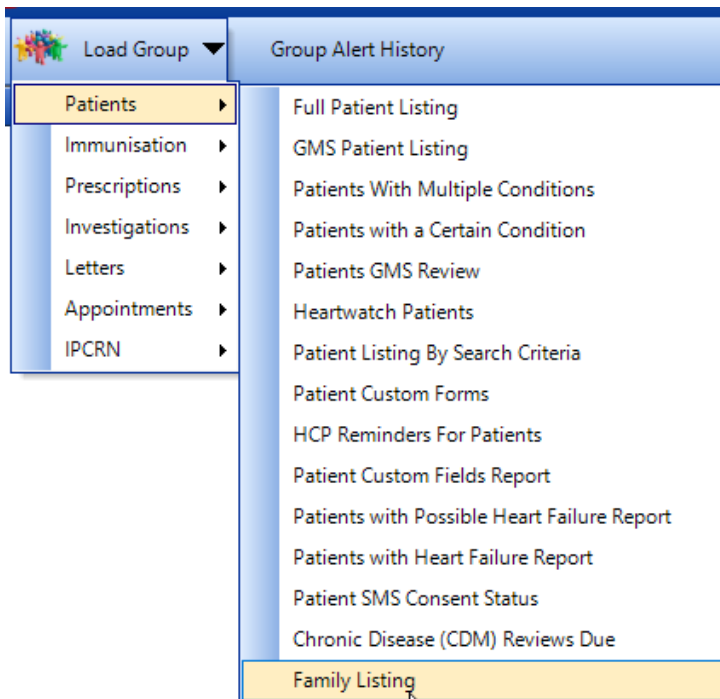
## 2. Patient Maintenance

### 2.1. Patient Registration

Country codes for Australia, Brazil and Ukraine added to the Mobile number field.

### 2.2. Patient Group Alerts & Bulk SMS

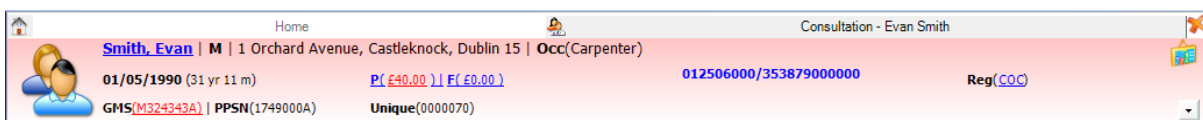
The Family Listing report is now available in the Patients group.



## 3. Consultation

### 2.3. Consultation Summary

The consultation header has been tidied up to include Registrations on CDM, Cycle of Care and Heartwatch. Double click on the registration e.g. CDM to open the CDM Care Protocol.



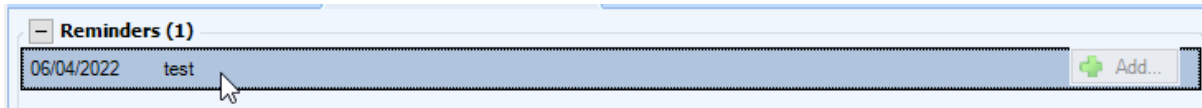
Tabs have been added on the right hand side for Summary, Actions, Tasks and SMS.



The **Actions** tab shows Reminders, Recall Opportunities, Investigations in review, Documents in review and Immunisations due.

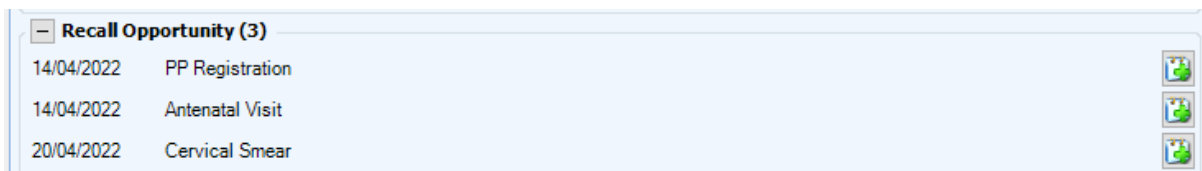
## Reminders

Click the **Add** button to add a new reminder. Double click a reminder to edit any reminder.



## Recall Opportunities

This section will show CDM visits due, Antenatal visit due and Cervical Smear recalls due. Click the Add appointment button to schedule an appointment for the due date selected. The Find Free Slot window will appear allowing you to select a free slot on that date.



## Notes:


1. CDM - For OCF & PP the outcome is taken into account so if for example the outcome of the OCF Review is Prevention Programme then a PP Registration opportunity will be added.
2. Antenatal – The next visit is based on the Next Visit GP date in the Antenatal visit.
3. Cervical Smear – The recall date is based on the Date next Smear in the Cervical Smear Investigation.

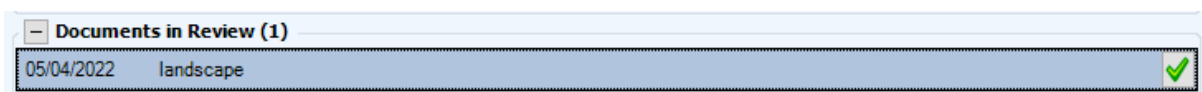
## Investigations in Review

Double click to open the investigation.



## Documents in Review

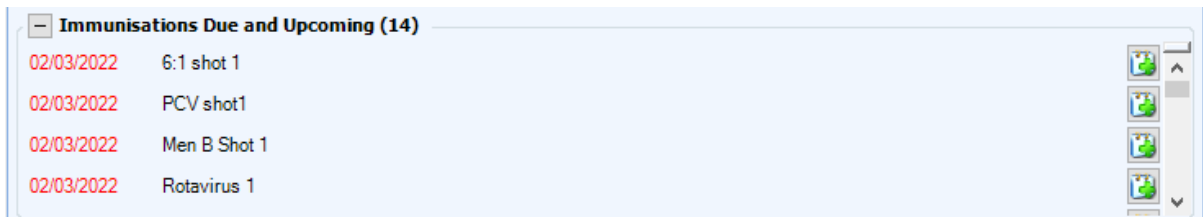
Double click to open the document. Click the tick button  to mark the document as read.



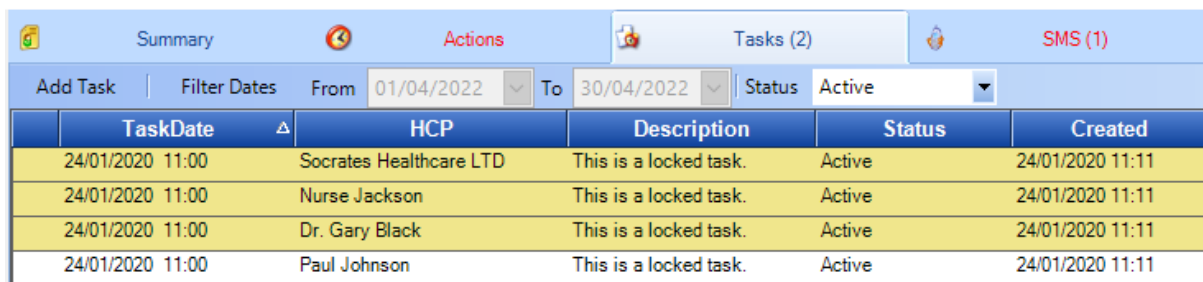
## Immunisations Due

Select the Immunisation from the list and click the Add appointment button to schedule an appointment for the date the immunisation is due.

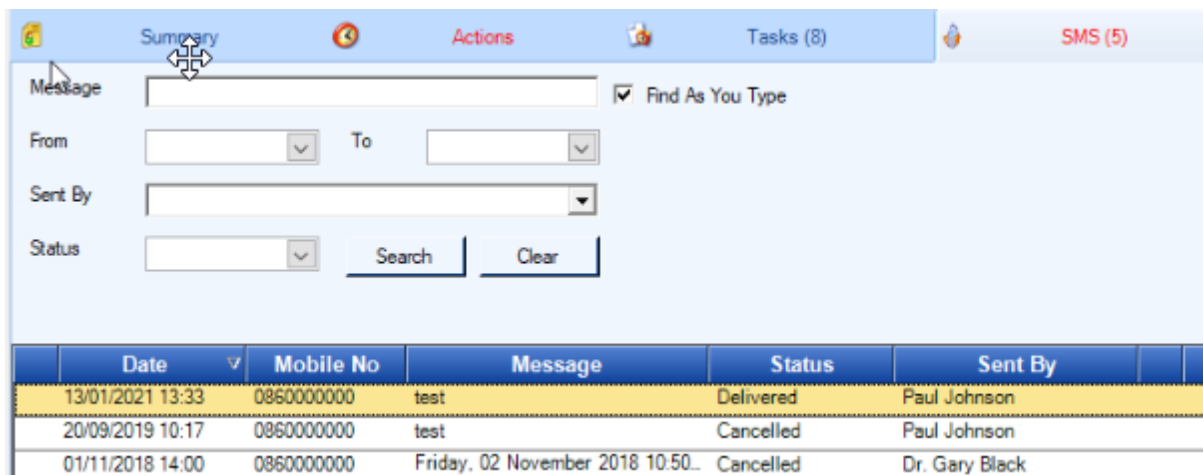
Double click an immunisation shot to open the Immunisations section.



The **Tasks** tab shows all active tasks for the patient. The counter will show number of tasks assigned to logged in user.



The **SMS** Tab shows all sms sent for patient together with the status of the message.



## 2.4.Prescriptions

A **Save & Add New** button has been added to the Add Prescription window allowing you to continue adding multiple drugs if you wish. When you have completed adding all drugs for the patient click Finish.

If you click X in the middle of adding multiple drugs the previous drugs add will be saved in the patients chart.

**Add Prescription**

**Drugs**  
Cost: 12.75  
Pack: 30  
Form: TABLETS  
Strength: 5MG+5MG

Drug: ACERYCAL 5 MG + 5 MG TABLETS

Interactions: 0

Quantity: 28

Duration: 28

Start Date: 14/04/2022

Type: Repeat Issues: 6

Script: GMS Generic Only  Long Term  PRN

Instruction 1: UD AS DIRECTED

Instruction 2:

Instruction 3:

Instruction 4:

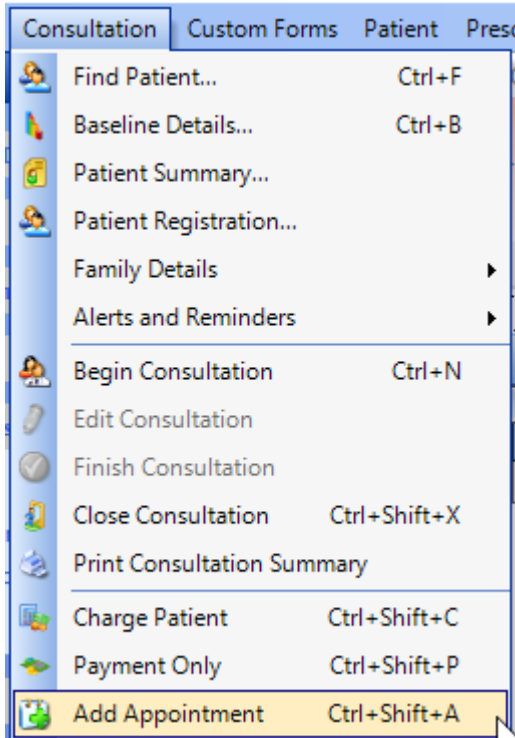
Additional Instructions:

Indication: Initiated In:

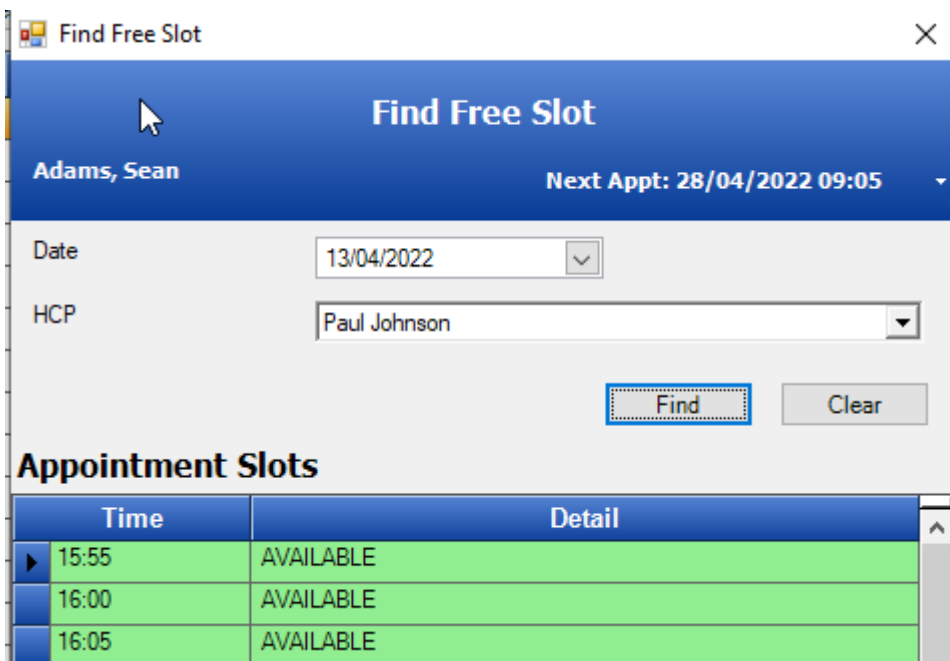
[Record Additional Notes](#) **Save & Add New** Finish

## 2.5. Add Appointment

The Find Free Slot window will be displayed when you use the shortcut keys (Ctrl + Shift + A) anywhere in the patient's chart or if you click Consultation > Add Appointment to create an appointment for the patient.



Select the date and HCP to find a free slot to book this appointment. The patient's next appointment (after today) will be displayed in the header.

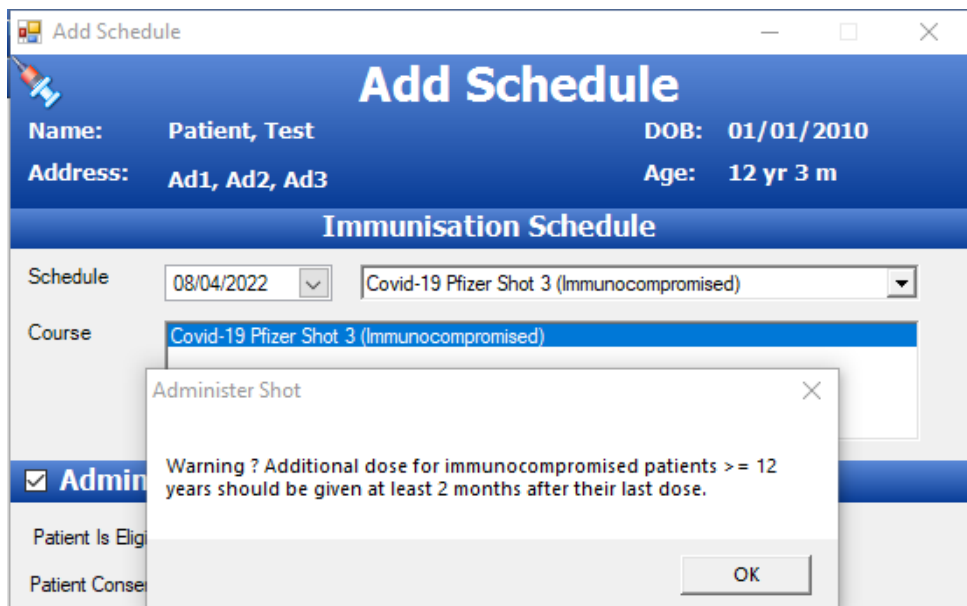


## 2.6. Immunisations

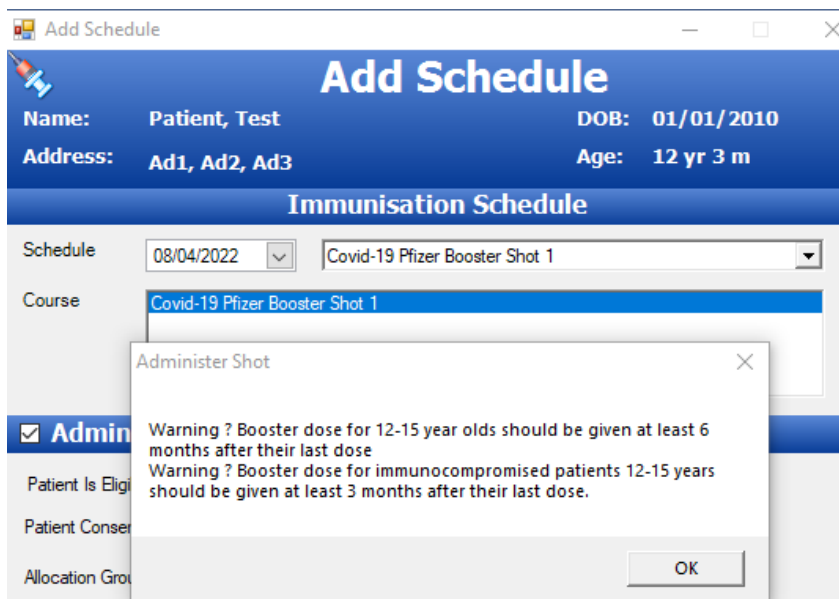
1. **Ethnicities** - The Ethnicity dropdown list has been updated to include Ukrainian and Arabs.

### 2. Warnings

A warning message is displayed for all patients greater than 12 and less than 16 years 3 months when adding a Covid Immunocompromised shot.



A warning message is displayed for all patients greater than 12 and less than 16 years 3 months when adding a Covid Booster shot.



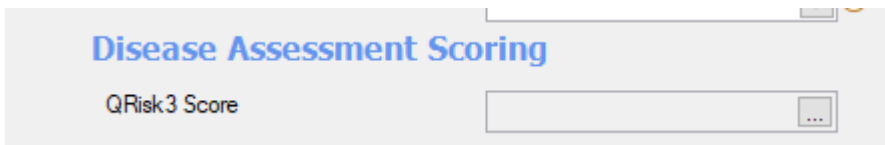
## 2.7.Chronic Disease Management

- **NA (Not Available)**

This is only to be used where lab does not supply the result. It does not mean not applicable.

- **Qrisk 3 Score**

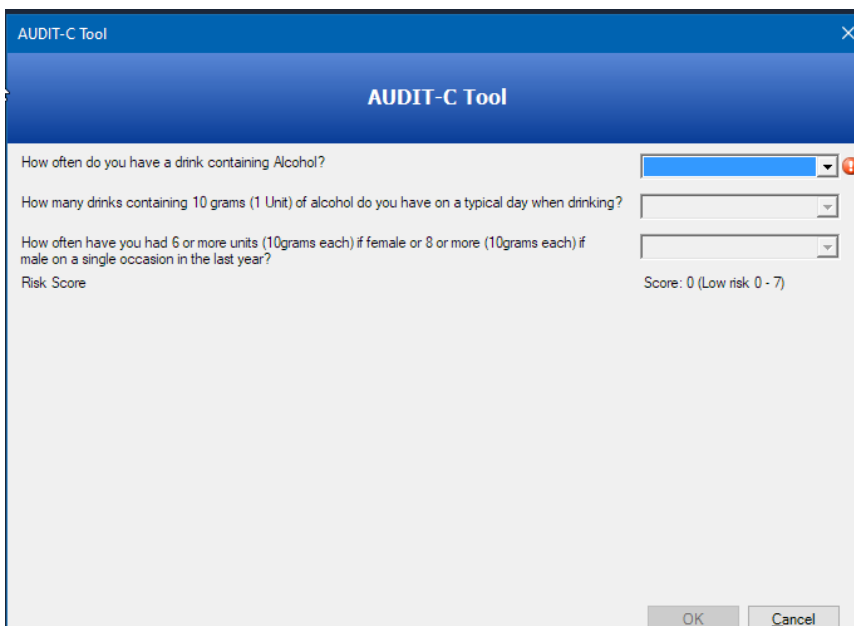
QRisk is no longer mandatory for CDM Asthma reviews.



The screenshot shows a form titled "Disease Assessment Scoring". Below the title, there is a label "QRisk3 Score" followed by an empty input field with a dropdown arrow on the right side.

- **Alcohol Risk Score**

Additional questions are hidden if the alcohol risk score is below 5.



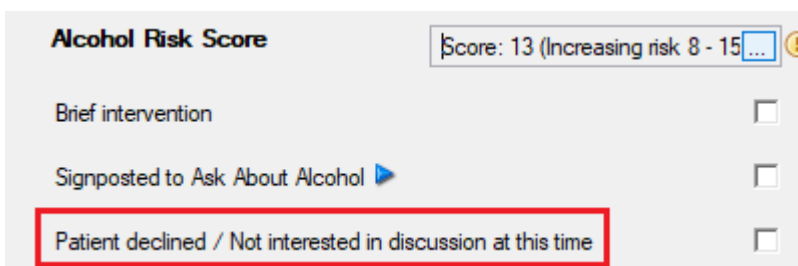
The screenshot shows a window titled "AUDIT-C Tool". It contains three questions, each with a dropdown menu:

- How often do you have a drink containing Alcohol?
- How many drinks containing 10 grams (1 Unit) of alcohol do you have on a typical day when drinking?
- How often have you had 6 or more units (10grams each) if female or 8 or more (10grams each) if male on a single occasion in the last year?

Below the questions, it says "Risk Score" and "Score: 0 (Low risk 0 - 7)". At the bottom, there are "OK" and "Cancel" buttons.

- **Alcohol and Smoking Interventions text updated**

Text for Interventions updated.



The screenshot shows a form titled "Alcohol Risk Score". At the top, it displays "Score: 13 (Increasing risk 8 - 15)". Below this, there are three options, each with a checkbox:

- Brief intervention
- Signposted to Ask About Alcohol
- Patient declined / Not interested in discussion at this time

The third option is highlighted with a red box.

**Smoking Status** Current

Brief Intervention

Signposted to HSE QUIT services

Referred to HSE QUIT services

Prescribed or referred for Stop Smoking medication (NRT/varenicline)

**Patient declined / Not interested in quitting at this time**

- **Care Plan**

Text on the Care Plans has been updated.

**Personalised Care Plan**

Name of Carer / Family Member

**Consent to disclose Care Plan to Carer/Family Member**  Yes  No

**Medications** [Refresh](#)  Print

KELKIN G/F TEA CAKES 165G

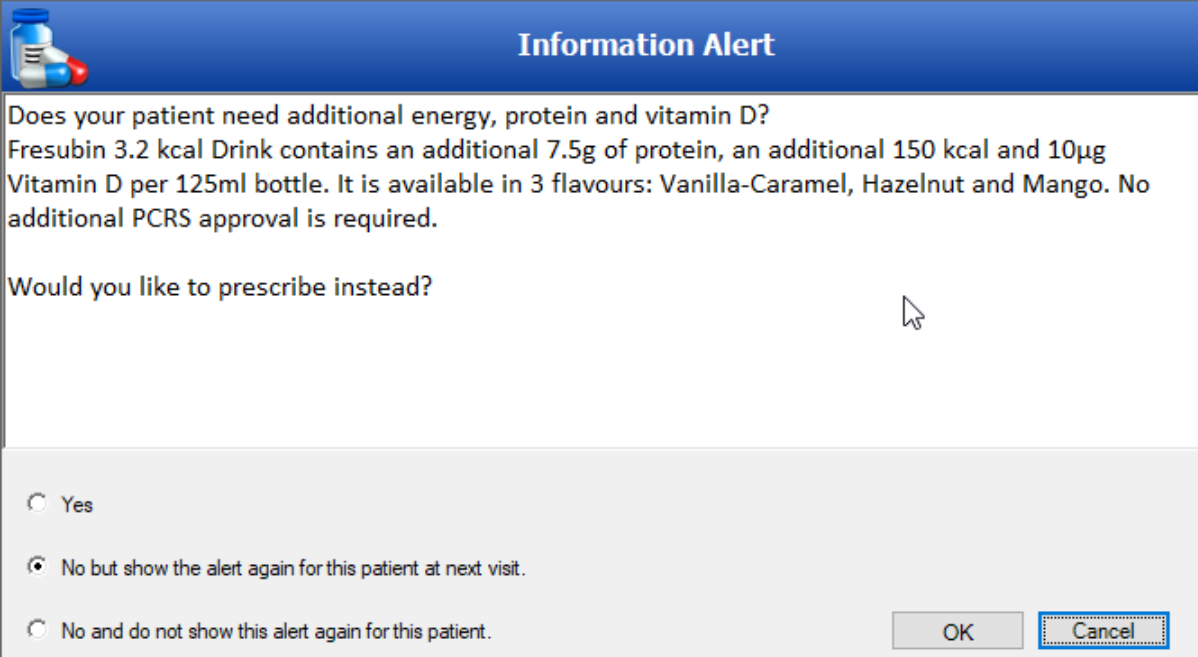
Add new line...

**Have you any questions/concerns regarding your medication?**  Yes  No

## 2.8.Fresubin Drug Alert

When a patient is being prescribed or re-prescribed Fresubin the following alerts will be displayed based on the type of Fresubin selected.

Information Alert



**Information Alert**

Does your patient need additional energy, protein and vitamin D?  
Fresubin 3.2 kcal Drink contains an additional 7.5g of protein, an additional 150 kcal and 10µg Vitamin D per 125ml bottle. It is available in 3 flavours: Vanilla-Caramel, Hazelnut and Mango. No additional PCRS approval is required.

Would you like to prescribe instead?

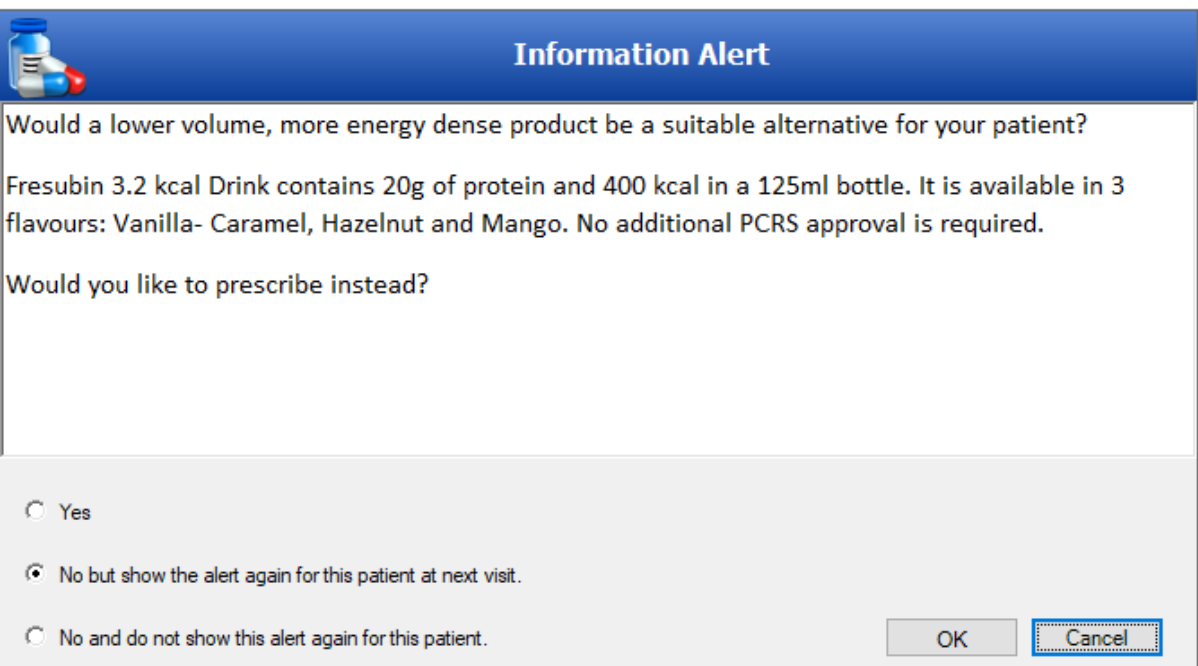
Yes

No but show the alert again for this patient at next visit.

No and do not show this alert again for this patient.

OK Cancel

Information Alert



**Information Alert**

Would a lower volume, more energy dense product be a suitable alternative for your patient?  
Fresubin 3.2 kcal Drink contains 20g of protein and 400 kcal in a 125ml bottle. It is available in 3 flavours: Vanilla- Caramel, Hazelnut and Mango. No additional PCRS approval is required.

Would you like to prescribe instead?

Yes

No but show the alert again for this patient at next visit.

No and do not show this alert again for this patient.

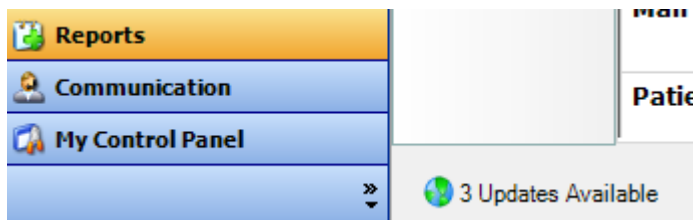
OK Cancel

Clicking Yes will prescribe the new Fresubin 3.2 kcal drink recommended.

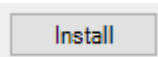
## 4. Reports / Forms

### 3.1. Report Updates

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.



- **Reports Updated:**
  - Electronic Referrals
    - Updated to include referrals marked as Hardcopy Response Received under the Completed status
  - IPCRN Tools – Audit of AFib
  - Investigation : Native Lab view and Print Investigation Templates updated
    - Both templates updated to include Status and Copy To (if applicable)
    - Native Lab View updated to include mobile phone number

### 3.2. Forms

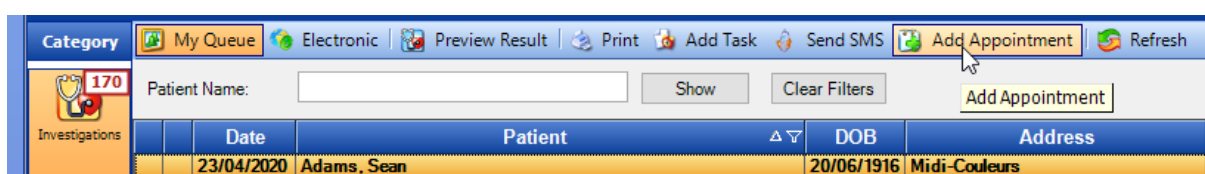
For updated Forms, open Control Panel > Admin Console > **Custom Forms** and click **Search Online**.



## 5. Control Panel

### 4.1. Result Viewer

An **Add Appointment** button added to the menu bar in Result Viewer (Investigations). Select an investigation from the list and click **Add Appointment**.



The Find Free Slot window will be displayed allowing you to select the date / HCP patient would like an appointment on. The Patients next appointment (after today) will be displayed in the header bar.

