socrates

Socrates GP v2.8.7.2 Update User Manual Oct 2022

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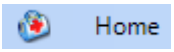
Socrates Message

This manual documents the updates from release version 2.8.6.4 to 2.8.7.2 and includes updates for Covid-19 Adapted Boosters.

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. For all other queries please email: support@clanwilliamhealth.com.

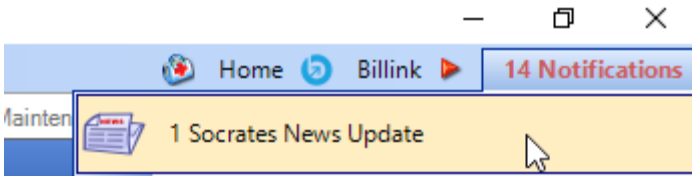
We hope you continue to enjoy using our product and we look forward to receiving your feedback.

Regards

Socrates Team, Clanwilliam Health

1. Notifications

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

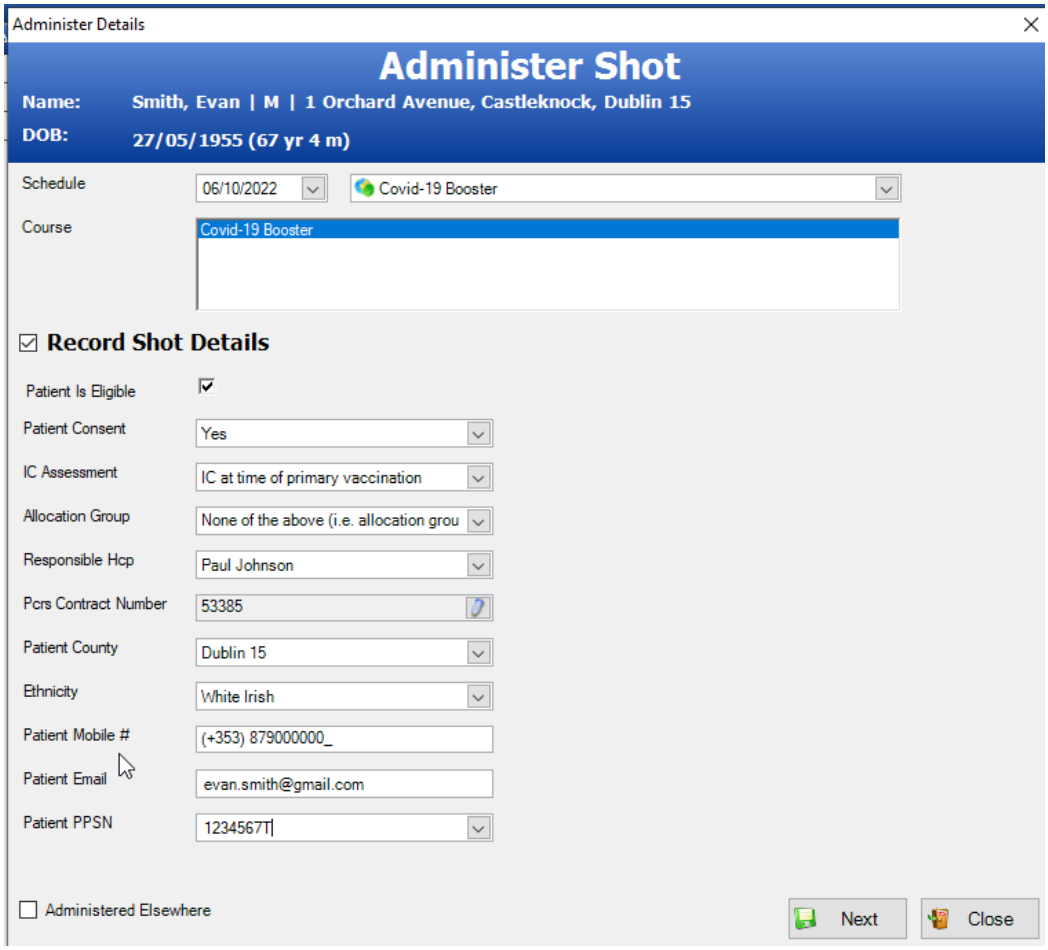


2. Consultation

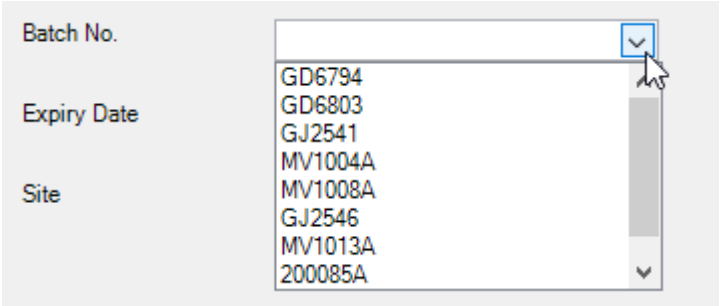
Immunisations

Select Covid-19 Booster from the Schedule dropdown list.

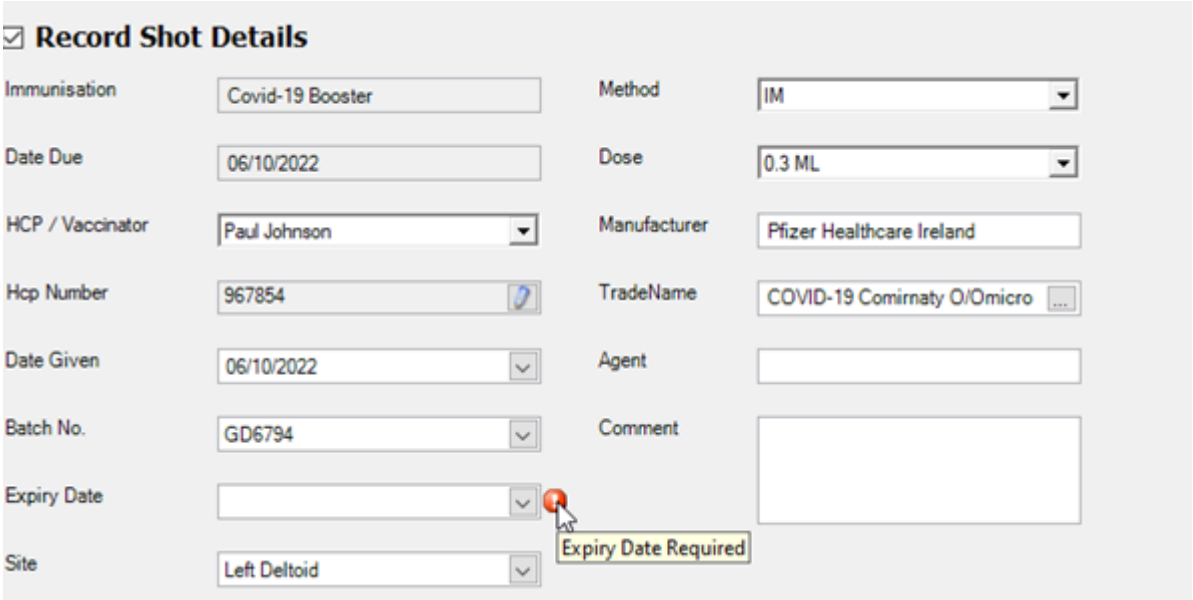
Complete the mandatory details as before and click **Next**.



Select the correct batch from the dropdown list. The Batch Numbers have been added for you during the upgrade process.



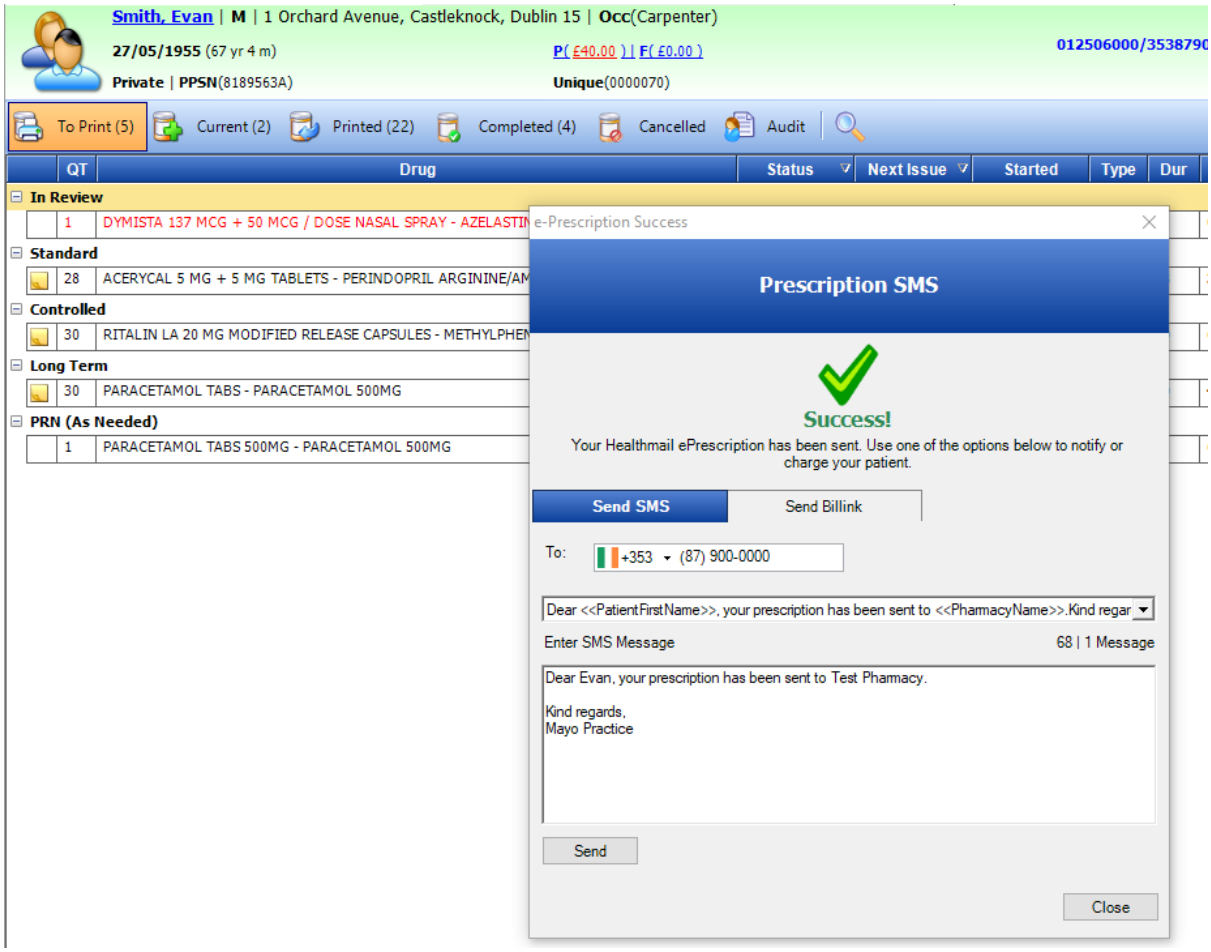
Enter the **Use By Date** that is on the box that you have received.



Prescriptions

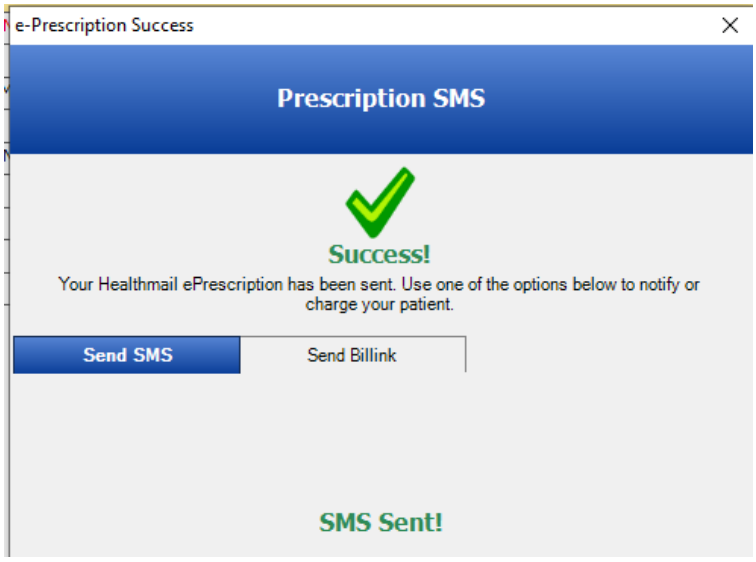
A new improvement has been added to allow you to send an SMS / add charge – Billink payment request after sending a Healthmail Rx. In order to use this feature you must have SMS enabled and have an esendex account.

After you press the Healthmail Rx button on a prescription the following window will appear if the patient has either Yes or Unknown as their SMS Consent status. You can send the patient an SMS and / or send a Billink payment request (if you have registered with Billink).

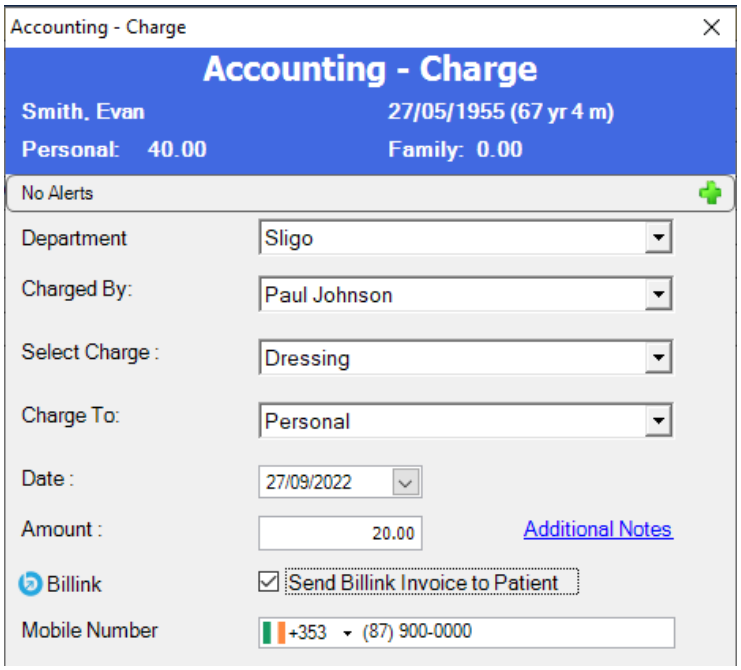


The patients mobile number will pre-populate from their chart if available or you can add the mobile number on this form.

You can use the default template or customise the message. Press the **Send** button to schedule an SMS to be sent to this mobile number.



You can also press **Send Billink** which will open the Add charge window from which you can send a Billink payment request (if registered) to the mobile number entered on the form.



3. Reports/Forms

1.1. Reports

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.

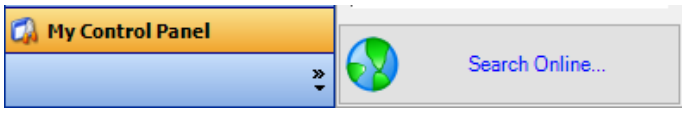
Click this button to open the list. Check all the reports by selecting the checkbox in the header and click Install.

Reports Updated:

- Flu Finder Report

1.2. Forms

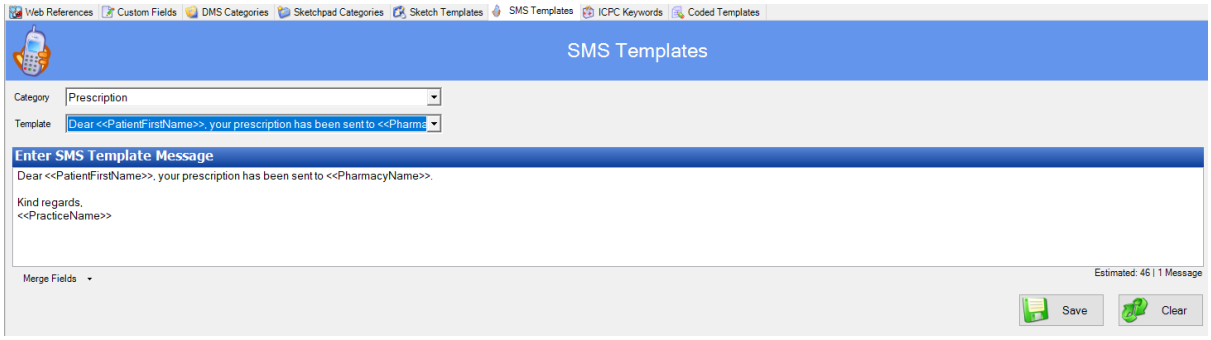
For updated Forms, open Control Panel > Admin Console > **Custom Forms** and click **Search Online**.



4. Control Panel > Admin Console

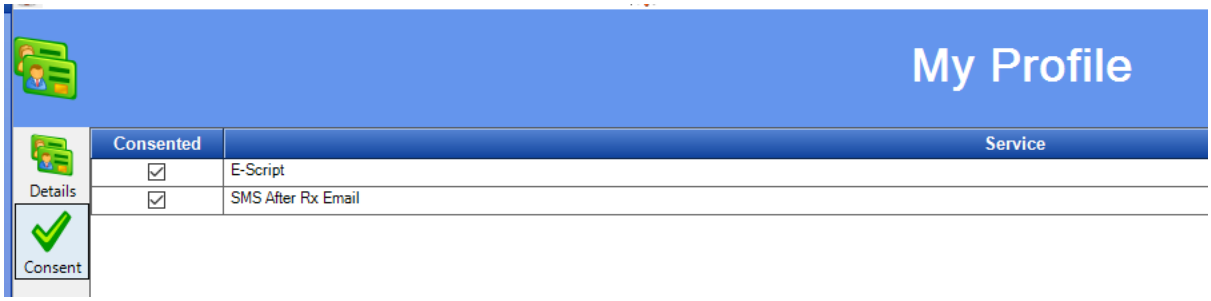
2.1. Admin Console > Categories & Templates

The Prescription SMS Template can be edited from Control Panel > Admin Console > Categories & Templates > SMS Templates. Select **Prescription** from the Category dropdown list and select the template from the Template dropdown list to edit it.



2.2. My Profile

If a doctor does not want to use the SMS pop up to appear after the Healthmail Rx button is pressed on a prescription they can remove their Consent in Control Panel > My Profile > Consent.

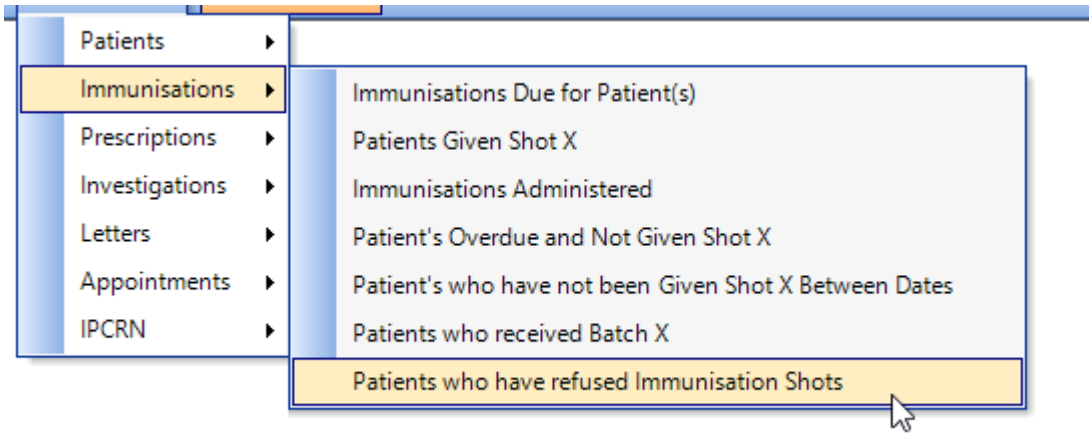


5. Tasks

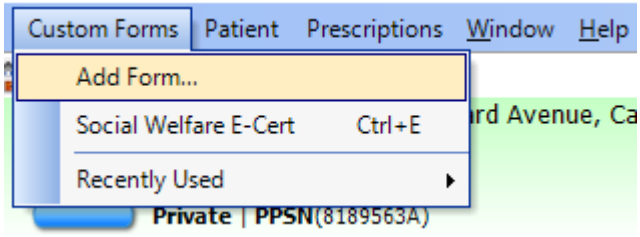
Finder Tool (Patient Maintenance > Patient Group Alerts)

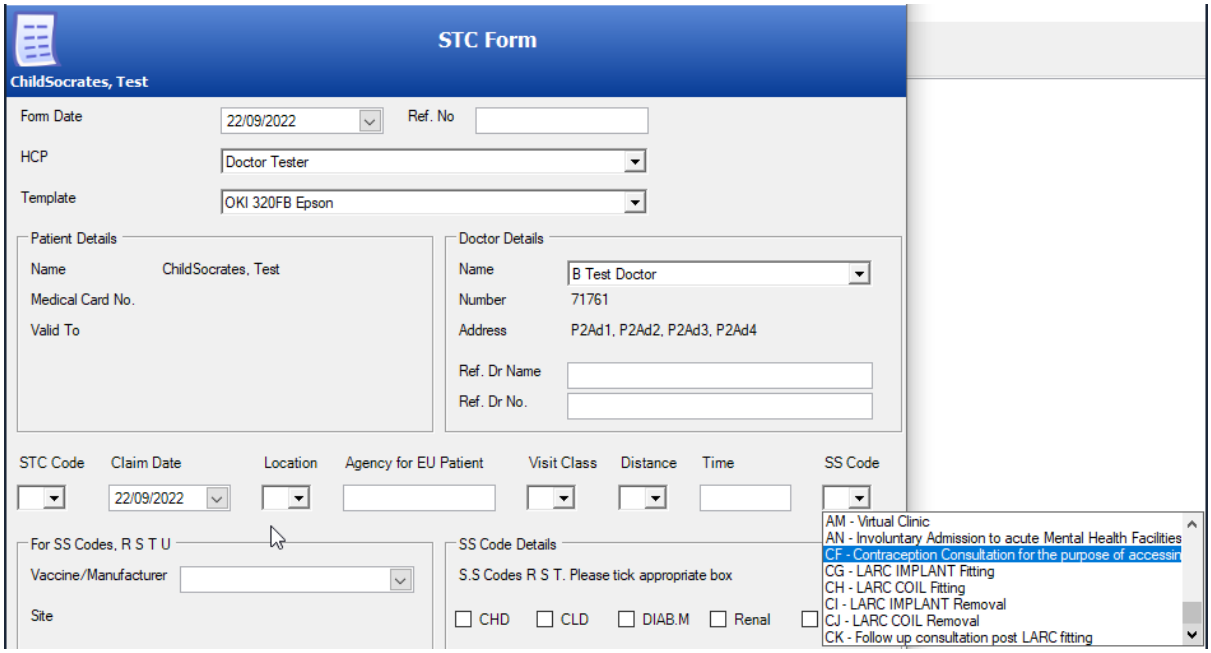
– you can now select a group of patients by checking the first patient, then pressing the Shift key on the keyboard and checking the last patient you want.

– Immunisations section updated to include 'Patients who have refused Immunisation Shots'



STC Codes - The six new codes have been added to the STC Form. Edit a patients consultation and select Custom Forms from the top menu bar and select Add Form to open the STC form.




STC Form
ChildSocrates, Test
Form Date
22/09/2022
Ref. No
HCP
Doctor Tester
Template
OKI 320FB Epson
Patient Details
Name
ChildSocrates, Test
Medical Card No.
Valid To
Doctor Details
Name
B Test Doctor
Number
71761
Address
P2Ad1, P2Ad2, P2Ad3, P2Ad4
Ref. Dr Name
Ref. Dr No.
STC Code
Claim Date
22/09/2022
Location
Agency for EU Patient
Visit Class
Distance
Time
SS Code
AM - Virtual Clinic
AN - Involuntary Admission to acute Mental Health Facilities
CF - Contraception Consultation for the purpose of accessin
CG - LARC IMPLANT Fitting
CH - LARC COIL Fitting
CI - LARC IMPLANT Removal
CJ - LARC COIL Removal
CK - Follow up consultation post LARC fitting
For SS Codes, R S T U
Vaccine/Manufacturer
Site
SS Code Details
S.S Codes R S T. Please tick appropriate box
CHD
CLD
DIAB.M
Renal