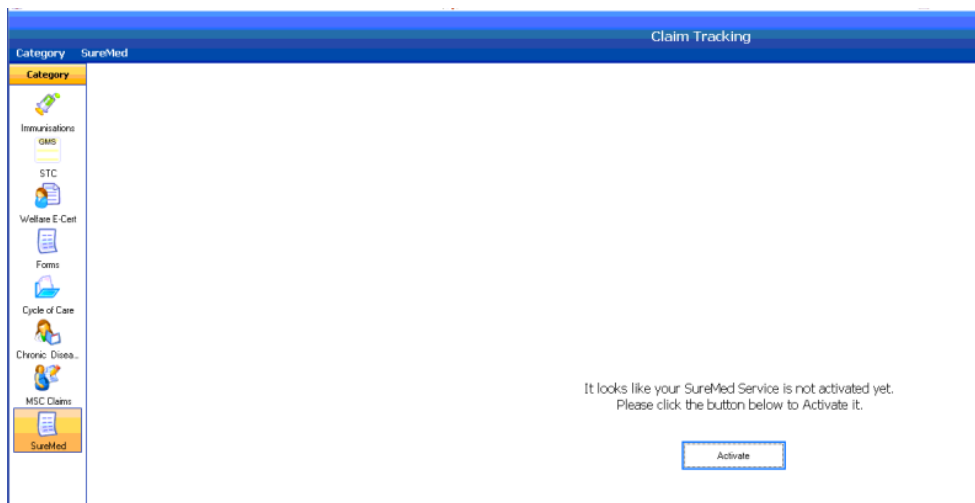


SureMed-Insurance Company Medical Report Requests

Requires Socrates Version 2.9.1.5 or later and a Healthlink Certificate on your machine.

Suremed Registration

When logged in as a doctor, you can activate SureMed by clicking **My Control Panel > Claim Tracking > Suremed**. Click the **Activate** button to register your practice.

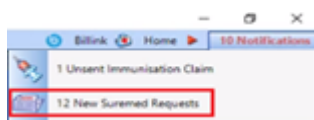


New Insurance Company Requests

When a Healthlink download is completed, any Insurance Company medical report requests / status updates will be downloaded into Socrates and will be shown in **My Control Panel > Claim Tracking > Suremed**.

Notifications

The **Notifications** section will show all new medical report requests. Double click on the notification to open the SureMed Requests section of the Claim Tracker.



Tasks

A new task is created for all new Suremed requests and will be assigned to the doctor that is assigned to the Suremed request. Click the link the in the Task to open the request.

[\[Click here to open the request now\]](#)

Completing the Form


Open the Suremed request from Notifications or Tasks. Click through each of the report tabs populating the report as required. Click **Save for Later** at any time to save your updates. The report will be set as status **'In Progress'** and can be reopened from the Claim Tracker.

Medical data from the patient's chart will be prepopulated based on the date/time that the form is **first** opened.



All details are checked by default. If you do not want to include certain medical details on the report untick the **'Include'** checkbox.

Date	Systolic	Diastolic	Pulse	Height	Weight	BMI	Include
06/06/2019	90 mm/Hg	66 mm/Hg		180.00 cm	80.00 Kg	24.69 Kg/M2	<input checked="" type="checkbox"/>
01/12/2017	90 mm/Hg	77 mm/Hg		180.00 cm			<input checked="" type="checkbox"/>
11/11/2015	90 mm/Hg	70 mm/Hg		180.00 cm	70.00 Kg	21.60 Kg/M2	<input type="checkbox"/>
09/09/2014	88 mm/Hg	70 mm/Hg		180.00 cm	80.00 Kg	24.69 Kg/M2	<input type="checkbox"/>

To Untick all, click the  beside the header item and select **Untick all**.



A progress bar at the top of the report will show which sections have been completed (Blue) and the current section you are working on in (Green).

Private Medical Attendants Report

Patient: **Niall Holland** Date of Birth: **16/05/1955** Gender: **Male**

✓
Introduction

Ⓜ
Social History

✓
Medical History

✓
Lab Studies

✓
Medications

6
File Attachments

7
Review

8
Submit

< Previous

Save for Later

Next >

The following details are pre-populated onto the report from the patient's chart:

- **Social History:** Cigarette & Alcohol use from Baseline details over the past 15 years.
- **Medical History:**
 - Clinical Exams: All Blood pressure results recorded in the past 5 years.
 - Active Conditions - Notes marked as Active Medical Conditions in the last 15 years which are not Private notes.
 - Family History – Notes marked as Family History in the last 15 years.
 - All Attendances – All other patient notes in the last 15 years.
 - Additional Information – All data in the electronic referrals subsection.
 - Social Welfare Certs – Details of all electronically submitted Social Welfare certs.

Social Welfare Certs			
From	To	Illness	Include
23/03/2023	12/04/2023	J02.9 - Acute pharyngitis, unspecified	<input checked="" type="checkbox"/>

- **Lab Studies:** Lab results from the patient chart in the last 5 years.
- **Medications:** (Last 5 years)
 - Medications from the Current and Previous Medications from the patient's chart

File Attachments:

Click **Attach File** to select a file from the patient's chart to send with the report. Repeat this process for each attachment. Click **View** button to open the attachment and **Remove** to remove the attachment. Once the files are uploaded you will see them listed. Click **Next**.

Attach File

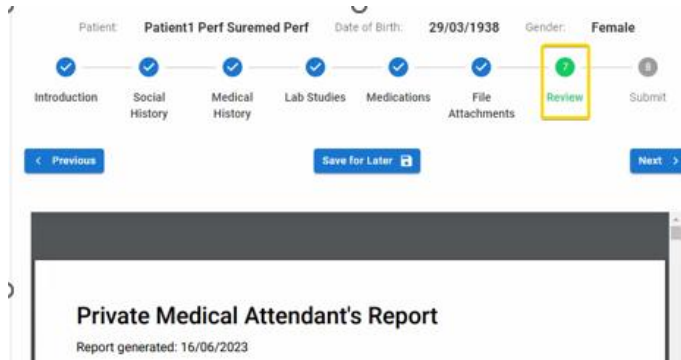
1 file uploaded

Letter_42_34.pdf

View

Remove

Review: Read through the report and confirm it is correct. Click **Next** to proceed.



The first time you submit a medical report request, you will be required to add your bank account details. The doctor who submits the form will receive the payment into the bank account selected. Click **Add new account** to enter these details.



Click the checkbox to confirm that you agree to the Website Terms of Use and click **Submit**.

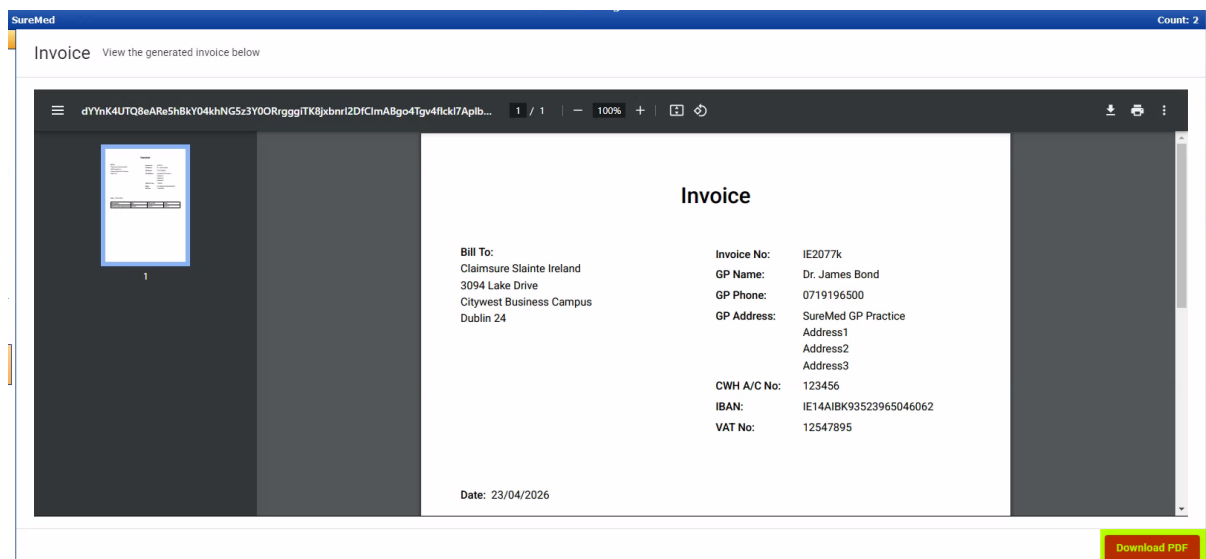
Submit request to insurer

By clicking submit you agree to the Website Terms of Use



The medical report is submitted to the Insurance Company, and an Invoice is displayed on screen.

Click 'Download PDF' on this window to return to the Claim Tracker.



A copy of the report is saved to the patient documents in the e-referrals sub-section.

Sent	Response	Description	HCP	Status	Created By
19/02/2025	SureMed_FrmPMAR_Private Medical Attendant's Report		James Bond	Accepted	James Bond
04/02/2025	SureMed_IHeart_Heart Disease Questionnaire		James Bond	Accepted	James Bond
28/01/2025	SureMed_FrmPMAR_Private Medical Attendant's Report		James Bond	Delivered	James Bond
27/01/2025	SureMed_FrmPMAR_Private Medical Attendant's Report		James Bond	Delivered	James Bond
27/01/2025	General Referral - CT		Bioggs Joe	Not Delivered	Bioggs Joe
27/01/2025	General Referral - Cardiology		Bioggs Joe	Not Delivered	Bioggs Joe

The status is updated to submitted in Claim Tracking and the task is marked as Complete.

Claim Tracking > Suremed


All requests will be displayed filtered by date and status. To filter the list by doctor, select the filter on the Doctor column in the grid.

Created Date	Patient	DOB	Suremed Ref #	Doctor	Form Type	Amount	Status
23/04/2025 21:41	Sunshine Soc. Mary Soc.	18/05/1989	IE2295a	(48) (Custom) (Blanks) (NotBlanks)	IEStroke	70.00	New
23/04/2025 13:33	Holland, Niall	16/05/1955	IE2177a	James Bond	FrmPMAR	150.00	New
23/04/2025 10:23	Hill SOCSuremed2, Jayden Test2	12/11/1987	IE2075m	James Bond	FrmPMAR	150.00	New

On the Suremed dashboard select **Submitted** from the Status dropdown list and click **View Invoice** button to view the invoice.

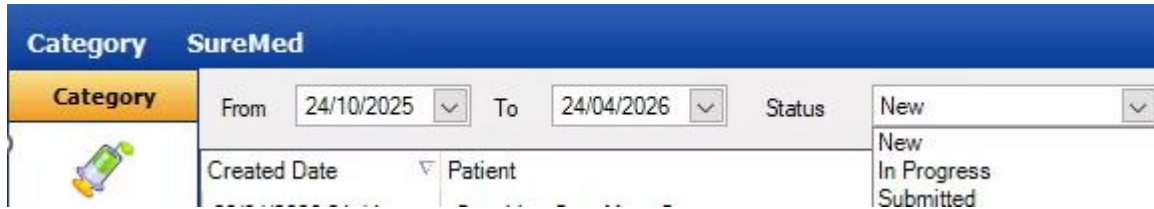
The screenshot shows a web browser window displaying an invoice. The invoice number is IE2073d. The 'View Invoice' button in the Claim Tracking grid is highlighted with a yellow box, and a yellow arrow points from it to the invoice page.

Decline Request

In order to decline a request on the Claim Tracking grid, click on red 'X' button  to Decline or reject to complete medical report request. [A report can only be declined when it is in the New status]

Status


The list can be filtered by Status:



- **New:** Request received which has not been actioned.
- **InProgress:** A request that has been started and not submitted.
- **Submitted:** A request that has been submitted.
- **Received:** Submitted request that has been marked as received by the Insurance company.
- **Declined:** Request that has been declined by the doctor.
- **Paid:** Request Mark as Paid on Cirrus.

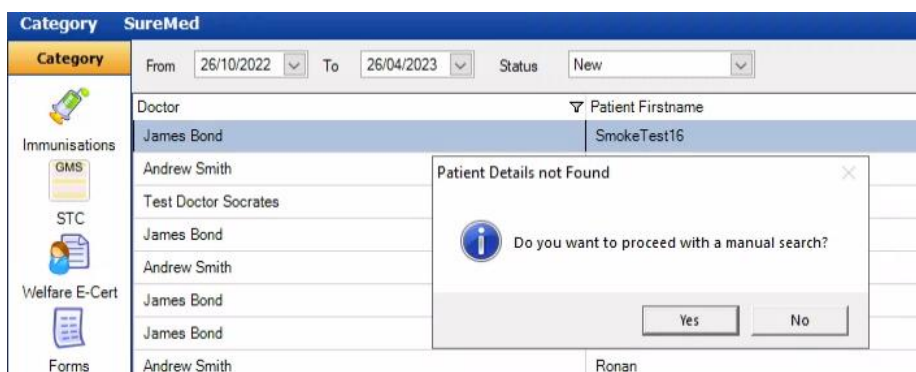
Appendix

Patient Matching Process

If the patient is matched to a patient in Socrates, double clicking on the request or clicking on the blue folder icon  will open the request for you to complete.

1. Socrates checks if there is 1 active patient with the same first name, surname and date of birth; if it finds more than 1 then it checks the address line 1 for an exact match.
2. If this fails Socrates checks if it can find one active patient with the same surname, date of birth and first initial of the first name.
3. If it does not find one exact patient match, then you must double click to match the patient manually.

If a request is received for a patient that cannot be matched, double clicking on the request will show a prompt asking you do you wish to search for the patient manually.



Click **Confirm** when you have found the correct patient in Socrates.

Patient - Confirmation Details :

Local Patient Details:	Suremed Patient Details:
Surname : Suremed	Surname : Suremed
First Name : SmokeTest16	First Name : SmokeTest16
DOB : 24/10/1934	DOB : 24/09/1934
Address 1 : Address1	Address 1 : Address1
<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>	

Tasks

If you do not want a Task to be created for your Suremed requests, click My Control Panel > My Profile > Consent to remove your consent.

My Profile	
Consented	Service
<input type="checkbox"/>	E-Script
<input type="checkbox"/>	SMS After Rx Email
<input type="checkbox"/>	SMS After E-Referral
<input checked="" type="checkbox"/>	Create User Task for Suremed Request

Troubleshooting

1. Check Patient has a Default HCP selected in Patient Registration.
2. Check the MCN for the doctor has 6 digits. Precede the MCN e.g. 12345 with a leading 0 e.g. 012345.