

socrates

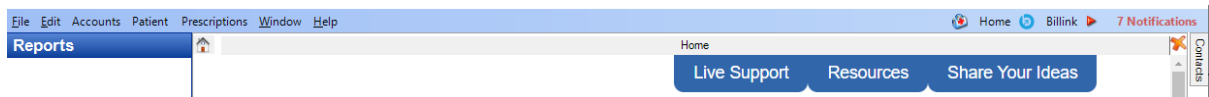
Socrates GP v3.1.1.4 Update User Manual October 2025

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Socrates Message

This manual documents the updates from release version 3.1.1.3 to 3.1.1.4 and includes Socrates AI.

All training materials i.e. Quick Guides, FAQ's, Videos and Webinars are available from the Help menu in Socrates > Online Help and Resources on the Socrates Home Page.



*If you have a change request e.g. software enhancement or report modification, click '**Share Your Ideas**' on the Socrates Home Page or email the details of the request to: cr@clanwilliamhealth.com*

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

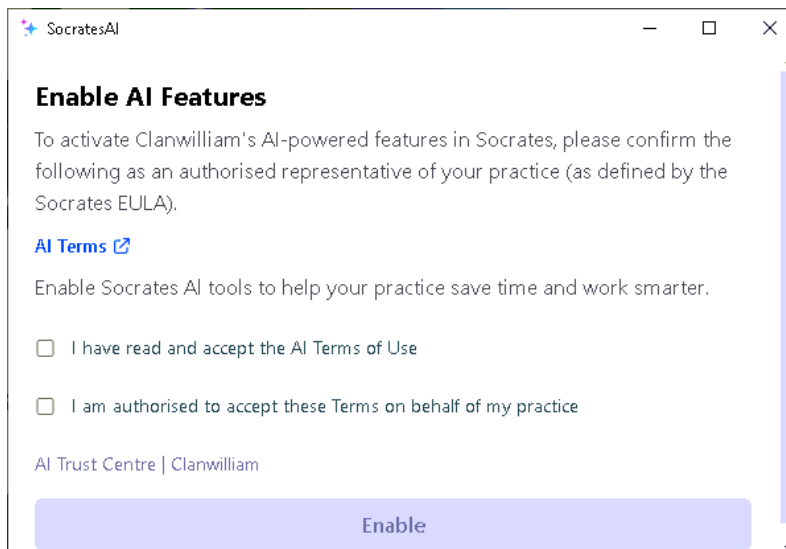
We hope you continue to enjoy using our product and we look forward to receiving your feedback.

Regards

Socrates Team, Clanwilliam

1. Socrates AI

Socrates AI (v1) is available in this build. Each user in the practice will be required to read and accept the Terms and Conditions before they can click **Enable** and use this feature.



The screenshot shows a window titled 'SocratesAI' with standard window controls. The main heading is 'Enable AI Features'. Below it, a paragraph states: 'To activate Clanwilliam's AI-powered features in Socrates, please confirm the following as an authorised representative of your practice (as defined by the Socrates EULA)'. There is a blue link for 'AI Terms' with an external link icon. Below this, a message says 'Enable Socrates AI tools to help your practice save time and work smarter.' Two checkboxes are present: 'I have read and accept the AI Terms of Use' and 'I am authorised to accept these Terms on behalf of my practice'. At the bottom left, it says 'AI Trust Centre | Clanwilliam'. A large blue 'Enable' button is at the bottom right.

- If a request exceeds the limit on the model we use (Approx 22,000 words) the note / document etc will be truncated at this limit. The AI summary will be displayed based on what was submitted to the AI model.
- Your practice will have 19 free AI requests per day.
- After your practice submits the 20th request you will see the below message. To sign up to Premium, enter your email address and contact person's mobile number. You will be automatically moved to Premium Access and our Accounts department will contact you regarding the monthly payment.
- Audit details are retained for every AI request submitted to track usage. **No patient data is retained.**

SocratesAI

Daily Free Limit Reached

Unlock unlimited AI access for your entire practice.

Your practice has used all free AI requests for today. Access will reset tomorrow morning with 19 new free requests.

To continue using AI features without limits or interruptions, upgrade to **Premium Access** for only **€49/month + VAT** — covering your entire practice.

Before upgrading, please confirm your details below and ensure you have your Practice Owner or Manager's approval.

Your email

Your mobile

Enable Premium Access

What is included in this version:

1. Notes Summarisation

All patient notes excluding Private Notes are submitted to the model when you press 'AI Summarise'.

- Notes are passed to the AI in the following order
 - Active Conditions
 - Coded Notes
 - Other Notes
 - Any legacy electronic notes (discharges summaries etc)
- A summary of less than 200 words will be displayed.

2. Individual Document Summary – (PDF & DOCX files)

You can get an AI Summary of the document by clicking on the PDF or .DOCX document and clicking the AI button.

3. Contacts – 'Socrates AI'

This is a continuous chat with 'Socrates AI', building on the previous questions asked. To clear the chat, close the conversation window.

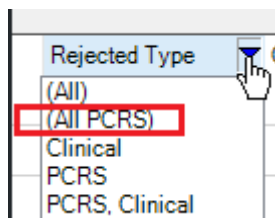
2. My Control Panel > Claim Tracking

2.1. CDM

A new column has been added called 'Rejected Type' to make it easier for you to correct your claims. This will display who rejected the claim – PCRS, Clinical or both PCRS & Clinical.

Claim Tracking												Count: 11
Category		Chronic Disease										
Category		From	To	Status	Rejected							Print
HCP												
Type												
Immunisation GMS STC												
Response	Date	Type	Patient	DOB	GMS	PSN	Status	Rejected Type	Contract HCP	Review HCP	Message	
30/10/2024	15/11/2023	CDM	cdm3, Patient2	08/11/1938	0673461A		Rejected	PCRS, Clinical	Dr Michael Murphy	Dr Michael Murphy	- Reimburseme	
30/10/2024	15/11/2023	PP	Blitzer, Beth	15/10/1987		1234567T	Rejected	PCRS, Clinical	Dr Michael Murphy	Dr Michael Murphy	- Reimburseme	
06/05/2025	17/01/2024	CDM	Regression, Patient	15/01/1944	2078661A	1234567T	Rejected	PCRS	Dr Michael Murphy	Dr Michael Murphy	- Reimburseme	

To find all PCRS rejected claims you can filter the column to 'All PCRS' and work through correcting the issue with the claim.



2.2. Immunisations

An Archive button has been added to the Rejected status.

Select the claim and click Archive to move the claim out of the rejected status. A claim cannot be moved back from the archive status so double check before clicking the Archive button.

☐ Payment Received

 Amount Paid:

Click the Archived checkbox to view all claims in the Archived status.

Category Immunisations

Count: 1

Category

From: 01/08/2025

Claim Status: Rejected

☒ Archived

☐ E-Claim

To: 30/09/2025

Is Childhood: Off

Is Paid: Off

Responsible Hcp

Print

2.3. STC

You can now update the status of any STC claims sent to BillServ.

☒ Sent
 02/10/2024
 ☐ Payment Received

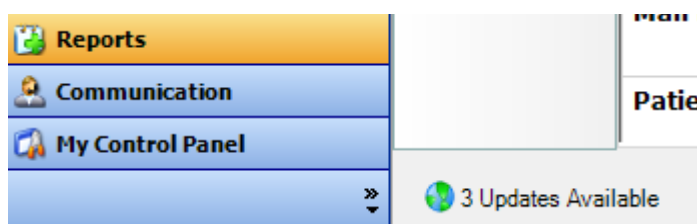
 Amount Paid 0.00
 ☐ Rejected

2.4. Actions

- CDM reviews that were added as a public patient are no longer recalled if patient switches to private and their diagnosis supports private but does not have a PP outcome.
- OCF reviews that were added as a public patient are no longer recalled if patient switches to private.
- PP reviews that were added as a public patient are no longer recalled if patient switches to private and their prevention programme reasons do not support private.
- Updated for OCF & PP reviews with no outcome recorded.

3. Reports

It is important that you regularly check for Report updates in Socrates. If there are updates available, click the link to open the list.



Click this button twice to select all  and click Install.

Install

Available Reports				
☒	Report	Published	Type	Status

4. Tasks / Bugs

- Affidea Referral - Autofill removed from Town, Contact Number and Fax.