

socrates

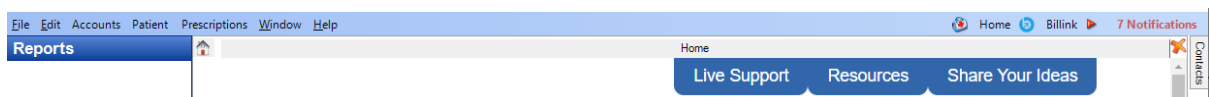
Socrates GP v3.2.0.2 Update User Manual November 2025

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Socrates Message

This manual documents the updates from release version 3.1.1.4 to 3.2.0.2 and includes electronic submissions for the Childhood Immunisations, AI Summarise for Image files together with some user requests e.g. SMS Categories.

*For all training materials e.g. Quick Guides, Videos click '**Resources**' on the Socrates home page and use the Search on the right-hand side.*



*If you have a change request, click '**Share Your Ideas**' on the Socrates home page and include as much information as possible.*

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 continued feedback and ideas.

Regards

Socrates Team, Lanas

1. Appointments

When you hover the mouse over a free appointment slot it will show you the slot time enabling you to ensure you are selecting the correct time for the patient's appointment.

[illegible]

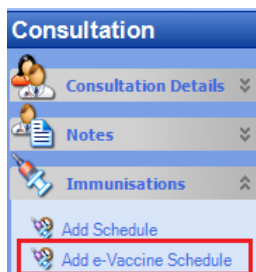
2. Consultation

2.1. Immunisations

This feature will be available for **new** childhood immunisations recorded in Socrates. Batches for these electronic shots will be automatically added to your system. Click 'Add e-Vaccine Schedule' to refresh the list.

If the Childhood Schedule 2024 is already in the patient's chart, **you do not need to add it again.** Continue administering the remaining shots in their schedule and click Save to submit them electronically.

To add the new electronic childhood schedule to the baby's chart click **Add e-Vaccine Schedule**.



Select the **Childhood Schedule 2024** from the dropdown list. Uncheck 'Record Shot details' and click Save.

Select ALL shots that you are giving today which have the same **Due Date** and click **Administer**.

[Multi-select: Using the mouse click the first shot, hold down the left button on the mouse, and drag the cursor down to the last shot.]

Complete the Consent form and click Next. Patient PPSN is mandatory.

If you do not have the PPSN, you can save the shot in Socrates and submit it when you receive the PPSN from the child's parent / guardian. These claims will have a status of 'Incomplete' in the Claim Tracker.

Complete the details of the shot given. **Ensure you select the correct Date Given before clicking Save.**

This vaccine claim will be submitted via Healthlink to PCRS and NIIS.

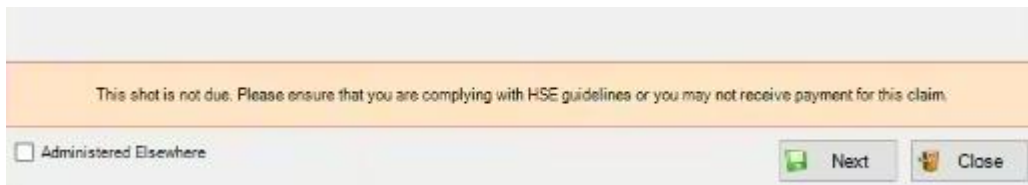
The next shot selected will be displayed for you to continue submitting all vaccines given today. If you click **Cancel** on any shot it will cancel the batch process. You will then have to select the shots that you want to record again.

Ensure you submit any unsent / incomplete / rejected claims and that they are Accepted before adding new e-Vaccines for the patient.

Notes:

- If you select 1 shot at a time, the Consent will be saved from the previous shot recorded on the same day.
- Multi select will only work when the shots are due and all shots have the same Due Date as the first shot.
- Existing shots cannot be sent as electronic claims.
- The PCRS system cannot process e-Vaccines for babies with date of birth before 01 October 2025. These will be input manually into the PCRS message from the clinical message submitted. Socrates will auto accept these PCRS messages for you. You can contact your local LIO for details on these claims.

- A warning message will be displayed if you are adding an e-Vaccine before the shot is due. Please ensure you adhere to HSE guidelines or you may not receive payment.



- E-Vaccine Corrections:
 - Date Given cannot be corrected. You will have to delete the shot and add it back in so please ensure you select the correct Date Given when recording the immunisation in the patient's chart.
 - Ensure you correct any existing shots e.g. 6:1 (1st shot) before adding new shots e.g. 6:1 (2nd shot) or they will be rejected by PCRS.

2.2. Documents

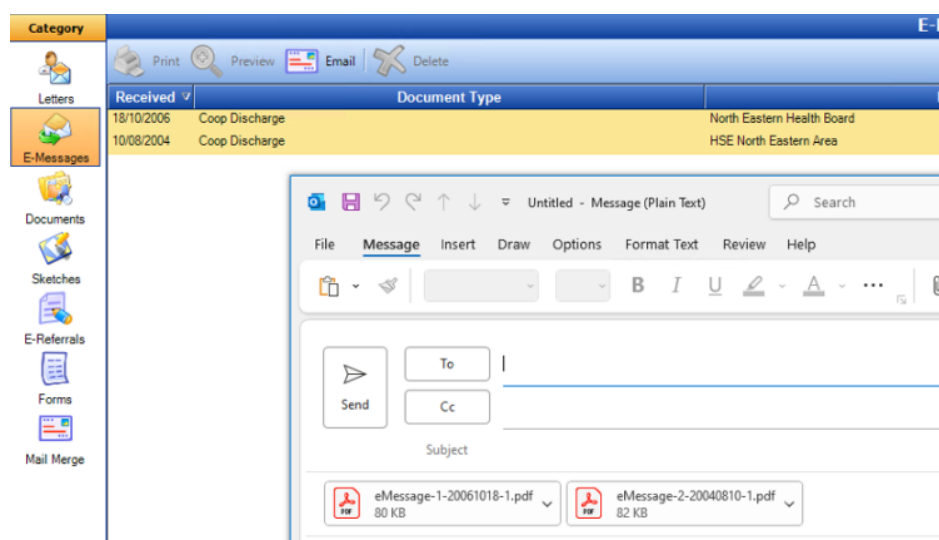
2.2.1. Documents > AI Summarise

You can get an AI Summary of image files saved in the document section by clicking on the document e.g. jpeg, png, tiff, and clicking the AI button.

2.2.2. Documents > e-Messages

If you want to attach multiple e-Messages to an email, select the first e-message, hold down the left button, and drag the cursor to the last message you want to attach.

Click 'Email' and each e-Message will be attached as a pdf to your draft email.



2.3. Prescriptions

'Schedule for Later' added to the Prescription SMS window to allow you to select the time your SMS will be sent to the patient.

e-Prescription Success

Prescription SMS



Success!

Your Healthmail ePrescription has been sent. Use one of the options below to notify or charge your patient.

Send SMS

Send Billink

To:

+353

(87)

Dear <<PatientFirstName>>, your prescription has been sent to <<PharmacyName>>.

Enter SMS Message

55 | 1 Message

Dear Test, your prescription has been sent to Pharmacy.

Kind regards,

Socrates Practice

☒ Schedule for Later

07/11/2025 10:00

Send

Close

3. My Control Panel > Claim Tracking

3.1. Immunisations

An Archive button has been added to the Immunisations Claim Tracker to allow you to archive any e-Vaccines that cannot be claimed.

Patient

Child.PCI2025 (14/05/2025)

PPSN: 7383355P

Shot Details

Rotavirus

Given: 22/09/2025, Batch #: Rotarix1

☐ Payment Received

Amount Paid:

Save

Clear

Archive

Submit

An Archived checkbox has been added to the header to allow you to view these archived claims.

Claim Tracking

Count: 1

Category

Immunisations

Category



From:

01/08/2025

Claim Status:

Rejected

☒ Archived
 ☐ E-Claim

Print

To:

30/09/2025

Is Childhood

Off

Is Paid

Off

Responsible Hcp

Lanas

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3.2. Admin Console > Categories & Templates

Organise your sms templates by assigning them to a Category. Open Control Panel > Admin Console > Categories & Templates and select the 'SMS Templates' tab.

Select the Template from the Template dropdown list. Your existing templates will all be in the 'Unassigned' category.

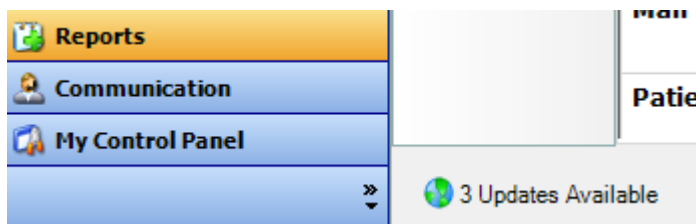
Click and enter the name of the new Category and click OK.

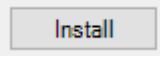
The new category is displayed in the Template dropdown list.

To assign another template to the same category select the template from the dropdown list and select the Category e.g. 'Labs' from the dropdown list.

4. 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. 



5. Tasks / Bugs

- Result Viewer now shows all X-Wave and Alliance referrals that have received a response in the last 30 days. In addition, the following improvements have been added.
 - Customised tooltip added.
 - Referral will show in red font if there is an item rejected within that referral.
 - Open chart button added which opens the referral section in the patient's chart.
- Communication > Lab Messaging:
 - When downloading HL7 Messages Alliance referrals will only be checked once in 24hours.
 - Lab Messaging window cannot be closed while a download/import is in progress.
- Actions
 - Unread e-Referral responses are shown in Actions. Mark them as read by clicking the check mark. 

- Suremed:
 - Suremed referrals which are marked as Paid will be displayed in the patient's chart > Documents > e-Referrals.
- CDM:
 - When a user resets the PCRS password and enters it into Socrates, that password will be updated for any other user in the practice that uses the same login credentials.
- SMS Message:
 - Height of the 'Sms Message has been increased to allow you to view more of the message entered.
 - Scroll bar added allowing you to read the full message before sending.
- Antenatal Maternity Service Claim form updated to the latest version of the form.
- Billink Sync updated to ensure that 2 users do not perform a sync with Billink at the same time.