

## 1. General

### 1.1. Notifications

Notifications are displayed on the top right-hand side and should be viewed regularly throughout the day e.g. Labs results, Overdue, unread or undelivered referrals etc



### 1.2. Home

Socrates Home screen contains our Noticeboard, product information, links to Resources and to Share Your Ideas.



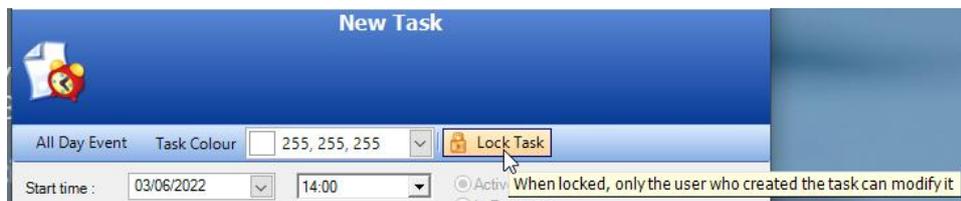
It should load by default but if it does not click Home. 

On the Resources page, use Search to find manuals / videos on features or click '**View All**' under each section and scroll through the list of resources.



### 1.3. Tasks

Monitor Tasks frequently. Lock important tasks so only the creator of the task can modify it.



## 1.4. General

### 1.4.1. Keyboard Shortcuts

Use keyboard shortcuts to quicken up your navigation through Socrates e.g. Ctrl + N to begin a consultation, Ctrl + B to open baseline details, F3 to open Notes, F5 to open Prescriptions. *Type 'Keyboard' into the Search on the Resources page.*

### 1.4.2. Searching in Socrates

Select a row in the grid and start typing e.g. patient name in Waiting Room, Claim Tracking, Notes et



### 1.5. Sign Up Features

#### 1.5.1. Socrates Kiosk

Allows patients to check themselves in at the practice, freeing up administration staff. *Type 'Kiosk' into the Search on the Resources page.*

#### 1.5.2. Pippo Patient Portal

Sign up to Pippo to allow your patients create a Patient Portal account where they can book appointments and request a prescription refill, all paid for in advance. You can customise which HCP's are available and their time slots, appointment types and you can add appointment questionnaire's. Visit [Home | Pippo](#) for more details. *Type 'Pippo' into the Search on the Resources page.*

#### 1.5.3. Billink Payments

Click Billink on the main menu to sign up to integrated payments. Visit <https://billinkpayments.com/> for more details.



Ensure you complete a Billink Sync (also completed after a healthlink download) before running your Accounting Reports.



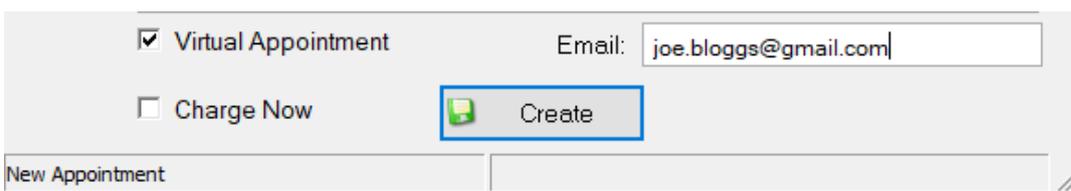
*Type 'Billink' into the Search on the Resources page.*

#### 1.5.4. Suremed (Insurance Company Requests)

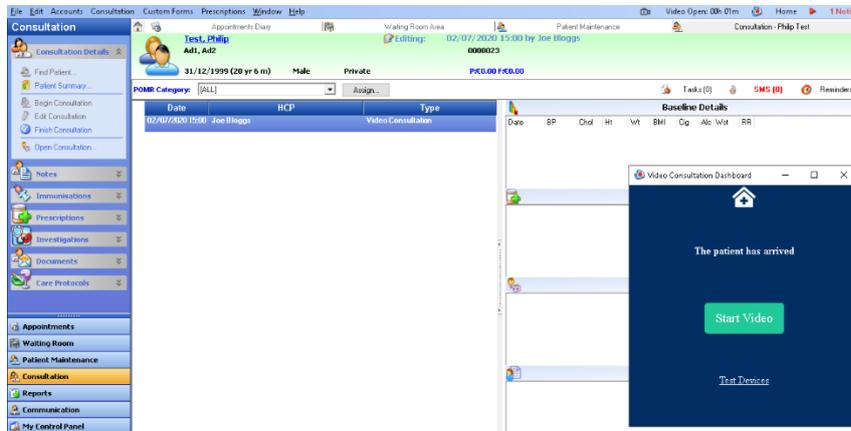
Complete Insurance company PMA's and questionnaires electronically by using Suremed. Enable Suremed by navigating to My Control Panel > Claim Tracking > Suremed. Click **Activate**. *Type 'Suremed' into the Search on the Resources page.*

#### 1.5.5. Video Consultations

Use video consultations to enhance your phone consultations. Once enabled you can check 'Virtual Appointment' when creating an appointment and enter the patient's email address.



The patient will receive an email to join the consultation 30 minutes before the appointment date / time. Start the video consultation in the patient’s chart.



Type 'Video' into the Search on the Resources page.

### 1.6. Patient Alerts

Patient Alerts are a powerful tool to use in your practice to quickly add an alert for an individual patient or a batch of patients at the same time from the Finder Tool.

ALERT TYPE	ALERT APPEARS WHEN
Appointment	Adding / editing an appointment and when adding a prescription refill request
Account	Adding a charge or payment for a patient and in Patient Accounts
Consultation	In the patient’s consultation
Prescription	User is printing a prescription

Type 'Alerts' into the Search on the Resources page.

### 1.7. Remove login details from your Profile

To switch to a new Healthmail, Healthlink or PCRS account, navigate to My Control Panel > My Profile > Accounts tab. Click  to remove the login from your profile.

### 1.8. Claim Tracking

Use Claim Tracking in My Control Panel to manage your all your electronic claims, STC claiming etc. Claim Tracking is updated when you 'Download electronic messages'.

### 1.9. AI

Use Socrates AI tools to help your practice be more efficient.

## 2. Download electronic messages

### 2.1. Download

Download electronic messages regularly throughout the day. Navigate to Communication > Lab Messaging > Download Electronic Messages.

### 2.2. Import Log

Run the **Import Log** (Communication > Lab Messaging) at the end of the day to ensure that all messages downloaded were imported. Run report for each error status: Change Status to Downloaded, HCP Matching and Error.



### 2.3. Result Viewer

Use the Result Viewer (My Control Panel) regularly throughout the day to ensure all patient's electronic messages are reviewed. Click Send SMS to send patient a message. Use **Schedule for Later** to choose a future date/time to send the message.

To batch complete results, select 1 row and click **Open Consultation** (left hand side explorer bar). Click Investigations tab and select multiple investigations (In Review) and click **Complete** button.

Type 'Result Viewer' into the Search on the Resources page.

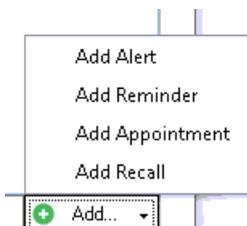
## 3. Consultation

### 3.1. Actions Area

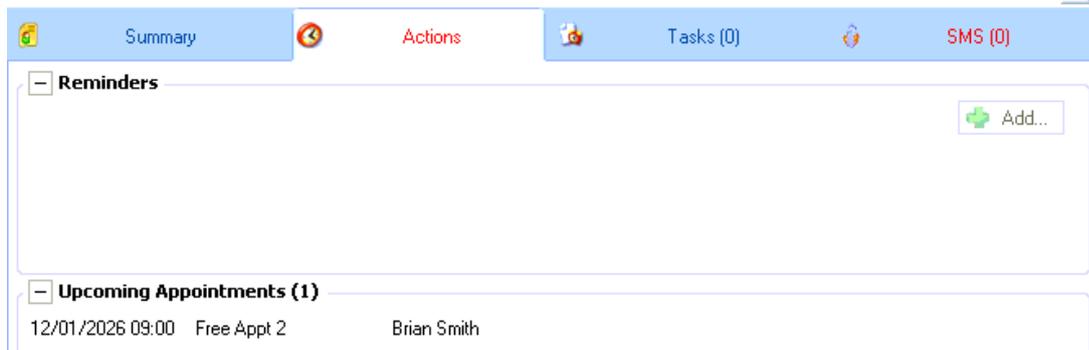
When you open a patient's consultation you will see any action items at the bottom of the screen e.g. alerts, reminders, recall opportunities, immunisations due and documents / investigations in review. Click any item to take you to Actions.



Click **Add** button to add a future appointment, an alert, reminder, or recall.



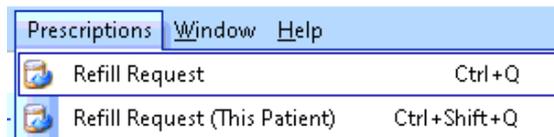
Use Actions to quick see patient's upcoming appointments.



## 3.2. Prescriptions

### 3.2.1. Refills

Use Prescription Refill Requests to record all patients prescription refills quickly and for better Refill management. If you use Pippo, patients can request their own prescriptions, and they will be displayed in Prescription Viewer > Refill Requests.



Type 'Refill' into the Search on the Resources page.

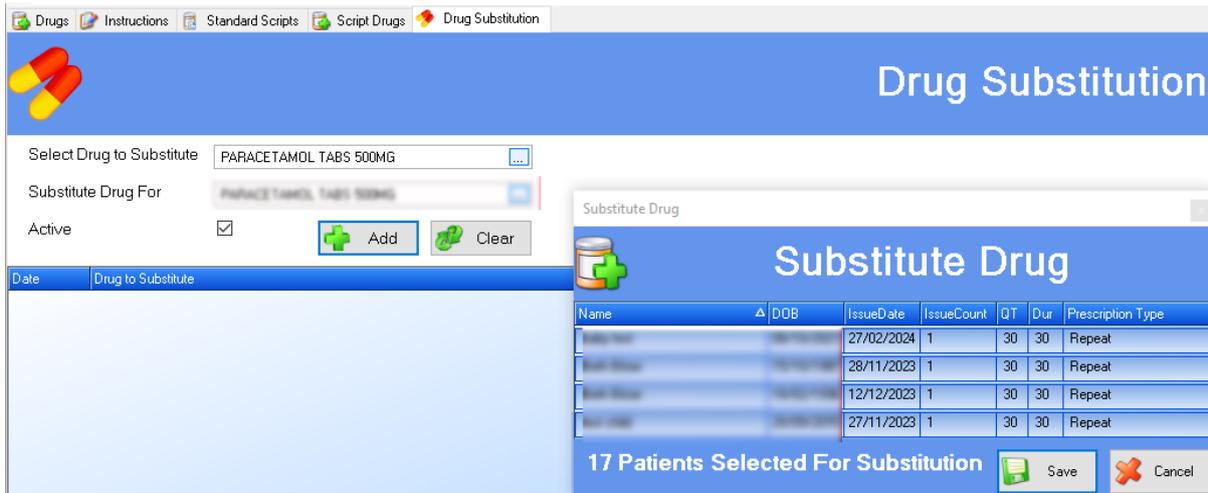
### 3.2.2. Populate last dosage / instruction

You can set a machine preference to populate the Add Prescription window with the last dosage / instruction added for that drug. Once populated, update the prescription as necessary for what you want to prescribe for this specific patient. Navigate to Edit > Preferences > General > Prescriptions tab and check 'Auto Populate Last dosage / instruction'.

### 3.2.3. Drug Substitution

Use this feature to replace any drug in each patients To Print queue with a substitute drug. Navigate to My Control Panel > Admin Console > Drugs > Drug Substitution tab.

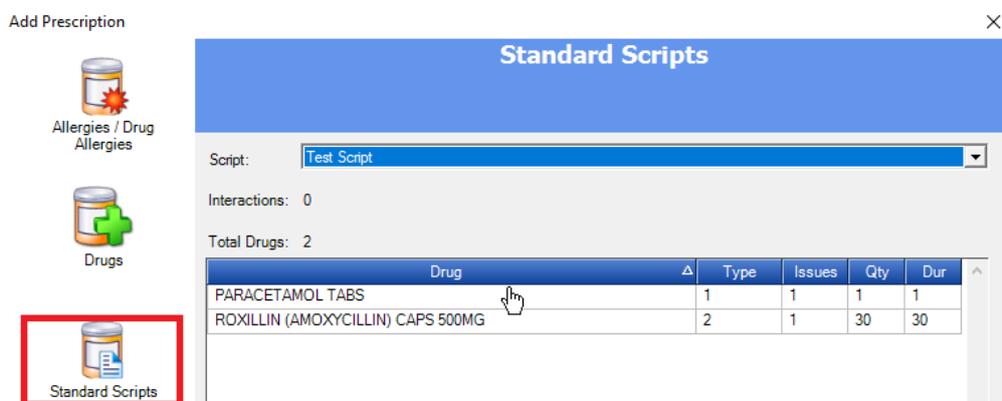
Use the ellipsis button to select the drug to substitute from and to and click Add. The substitute drug window will display the number of patients who this substitution will affect. Click Save to proceed.



Re-run the substitution by selecting it from the list and clicking the  button.

### 3.2.4. Standard Scripts

Set up Standard Scripts that you frequently use in Control Panel > Admin Console > Drugs. You can then quickly add these drugs to any patients' chart by selecting the required script from the dropdown list and then highlight some or all of the drugs.



Type 'Standard Scripts' into the Search on the Resources page.

## 3.3. Immunisations

Type 'Immunisation' into the Search on the Resources page.

### 3.3.1. Stock Control

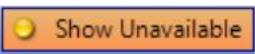
The Batch count is displayed when administering a batch if you add the batch count to each batch. Navigate to My Control Panel > Admin Console > Immunisations. Enter the Total and Remaining and click Update.

Batch Number

Batch	Expiry	TradeName	Batch Total	Remaining	Active
SDE71D2	31/05/2026	VAXIGRIP TRIVALENT FLU VACCINE	0	0	<input checked="" type="checkbox"/>
SDE71D1	31/05/2026	VAXIGRIP TRIVALENT FLU VACCINE	0	0	<input checked="" type="checkbox"/>
L32	30/06/2026	INFLUVAC TRIVALENT FLU VACCINE	0	0	<input checked="" type="checkbox"/>
YH3389	09/12/2025	FLUENZ 2025/2026 VACCINE NASAL SPRAY	0	0	<input checked="" type="checkbox"/>

Total  Remaining

If you want the batch to be marked as 'completed' when no stock is left, double click on the batch and check 'Complete batch when zero remaining'. When more stock arrives,

click  & select the batch.

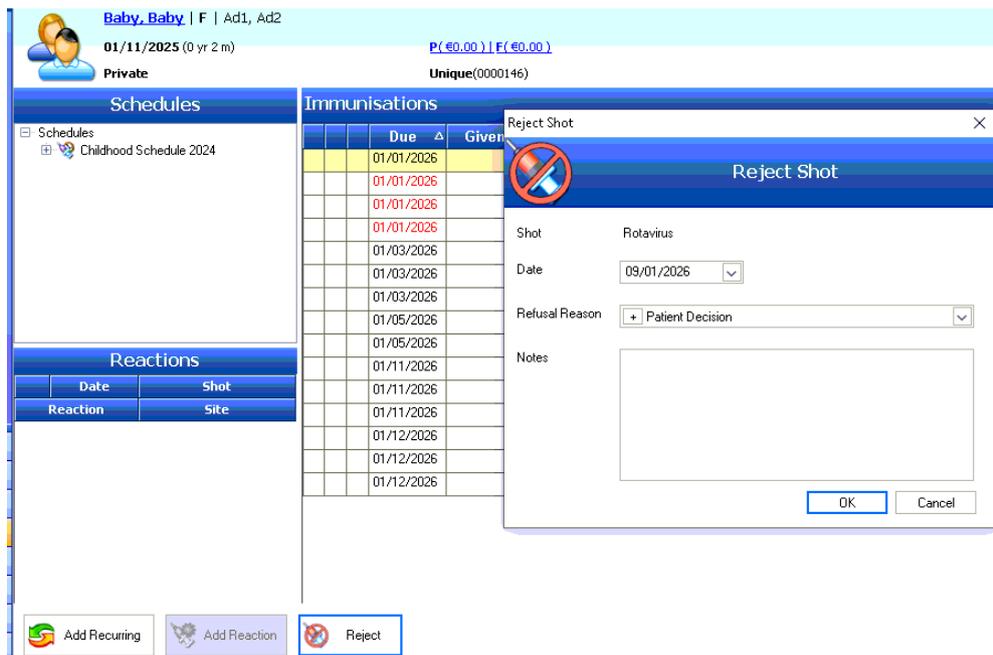
### 3.3.2. Administering multiple shots

If administering multiple shots in the same schedule, select the first shot and hold down the left key of the mouse and drag the mouse to the last shot. Spray all are highlighted click **Administer**.

Schedules		Immunisations						
<ul style="list-style-type: none"> <li>Schedules                             <ul style="list-style-type: none"> <li>Childhood Schedule 2024</li> </ul> </li> </ul>		Due	Given	Shot	Num	Batch	Administered By	
		01/01/2026		Rotavirus				
		01/01/2026		6 in 1				
		01/01/2026		MenB				
		01/01/2026		PCV				
		01/03/2026		Rotavirus	2			
		01/03/2026		6 in 1	2			
		01/03/2026		MenB	2			
		01/05/2026		6 in 1	3			
		01/05/2026		PCV	2			
		01/11/2026		MenB	3			
		01/11/2026		MMR				
		01/11/2026		Varicella				
		01/12/2026		6 in 1	4			
		01/12/2026		PCV	3			
		01/12/2026		MenC				

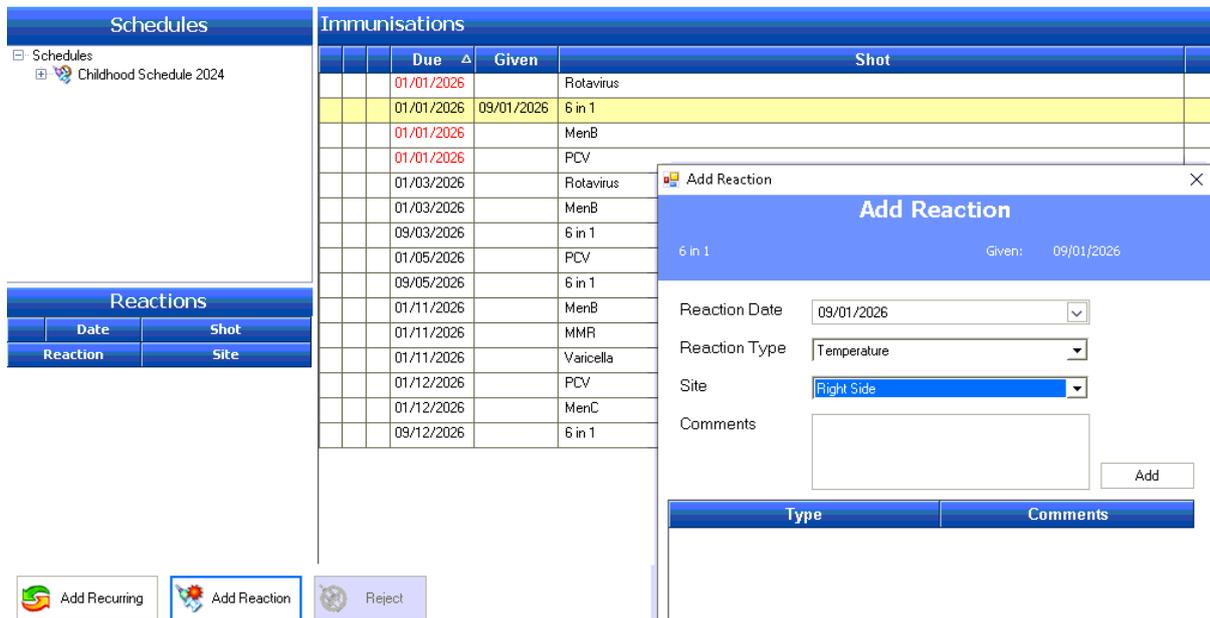
### 3.3.3. Reject Shot

If a patient or their guardian refuses a shot, select the shot from the list and click Reject. Enter the details and click OK.



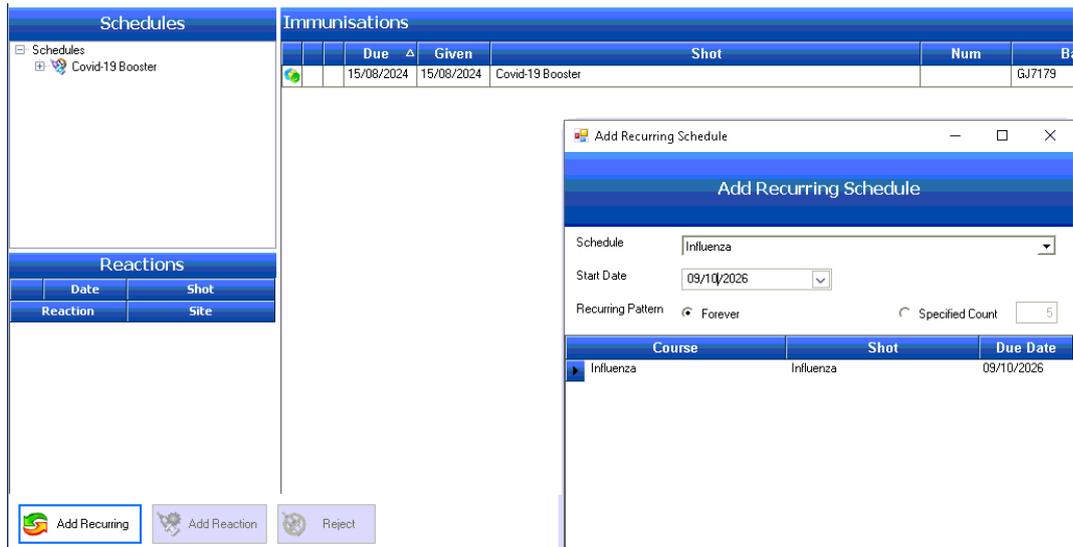
### 3.3.4. Add Reaction

If the patient had reaction to a shot given, select the shot and click Add Reaction. Enter the details of each reaction and click Add. Click Save.



### 3.3.5. Recurring Immunisation

To add a recurring immunisation to a patient’s chart e.g. Flu, Covid Booster, click Add Recurring. Select the Schedule from the dropdown list, enter the start date and choose the pattern e.g. Forever.

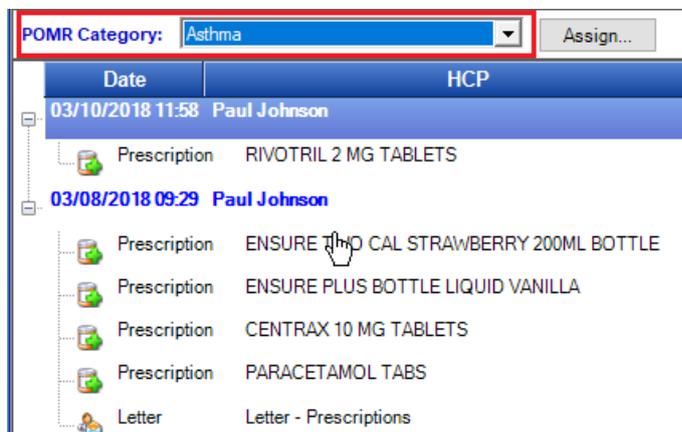


### 3.4. GMS Checker

Click the patient GMS number hyperlink to open the PCRS Eligibility window. Click Save to Chart to update Patient Registration with the updated details from PCRS.

### 3.5. POMR (Problem Orientated Medical Records)

Use **POMR Categories** to quickly find consultations and notes relating to each category of consultation e.g. Asthma, Hypertension etc



Type 'POMR' into the Search on the Resources page.

### 3.6. Time in Therapeutic Range (TTR) Calculator

The TTR (Time in Therapeutic Range) calculator sends the patient's last 4 INRs to the Primary Care HRB (Health Research Board) Centre in the Royal College of Surgeons (RCSI) who apply the Rosendaal method to the data & send back the TTR Score immediately to the Socrates Investigation.

The TTR calculator must be configured in Control Panel > Admin Console > Investigations. Type 'Time' into the Search on the Resources page.

### 3.7. Finish Consultation

A Finish Consultation notification can be enabled as a reminder to allow you to quickly charge the patient, schedule an appointment etc.

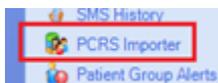


Navigate to Edit > Preferences > Notifications and check 'Show Notification Option every time I finish a Consultation' to enable this feature.

## 4. Patient Maintenance

### 4.1. PCRS Importer

Navigate to Patient Maintenance > **PCRS Importer** to manage your GMS lists on a monthly basis.



Type 'PCRS Importer' into the Search on the Resources page.

### 4.2. Patient Export

Navigate to Patient Maintenance > **Patient Export** to generate a pdf of the patient's medical history. Enter the Patients name in the Reference box (Surname, first name] and click the ellipsis button to select the correct patient. If running this report for Medico Legal reasons, click 'Include Audit details on report'.



Set up a default folder location by creating a folder called 'PatientExport' on your C drive. Click Edit > Preferences > General > Documents. Click ellipsis button beside Patient Export Path  and select the 'PatientExport' folder created.

### 4.3. Finder Tool

#### 4.3.1. Patient Finder Tool

Open Patient Maintenance > Finder Tool > Patients for advanced auditing and filtering of patients.

- New List – Generate a list of patients by running the first report.
- Add – Select another report and add that list of patients to the previous list generated.
- Remove – Remove any patient returned by the report listed from the previous list.
- Intersect – Will retain patients that are on the previous list and on this report.

Once you have generated the list required you can add these patients to a Recall List and / or add a Group Alert to their chart.

#### 4.3.2. CDM Finder Tool

**New Patients:** To find patients that could potentially be added to the CDM Programme select **New List** and either Chronic Disease Treatment Programme, Prevention Programme or Opportunistic Case Finding.

**Existing CDM Patients:** To find all existing CDM patients select **New List > Reviews Due** and ‘Chronic Disease (CDM) Reviews Due’.

Type ‘CDM Finder’ into the Search on the Resources page.



#### 4.3.3. STC Finder Tool

Use this tool to search Consultation Notes for potential STC Claims. Import the PCRS Itemised Listing to update all paid potential claims to a status of Paid.

Type ‘STC Finder’ into the Search on the Resources page.

### 4.4. Recalls / Group Alerts / Bulk SMS

To manage your patients visits set up **Recall lists**. Add patient to a recall from the Finder Tool, Patient menu or from Actions in the patient’s chart. You can use Bulk SMS to send all patients an SMS which is tracked as an event on all Recalls.

Click **Group Alert** to add an alert e.g. Appointment Alert to alert staff to advise patient of any specific requirements when they ring to book their appointment. You could also add a consultation alert as a reminder when the chart is opened.

Type ‘Recall’ into the Search on the Resources page.

### 5. Documents

#### 5.1. Healthmail Attachments

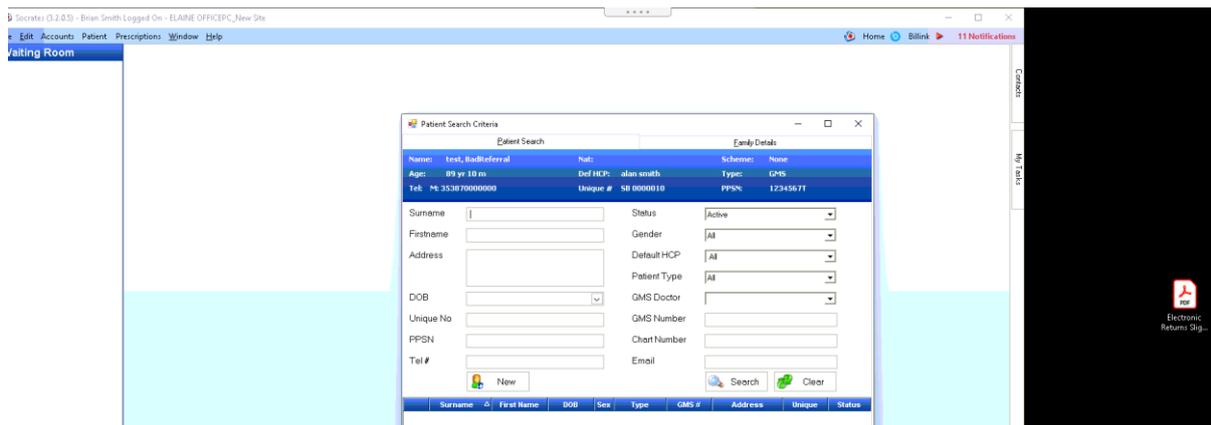
In the Document Management System (My Control Panel) or in the documents section of the patient's chart, click Attach File then select Attach Healthmail.



Type 'Healthmail' into the Search on the Resources page.

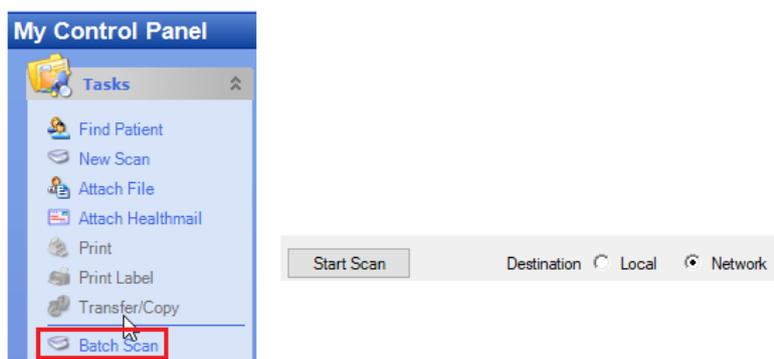
#### 5.2. Drag & Drop

If you have two monitors or minimize Socrates so you can access your computer, you can drag a file and drop it anywhere in Socrates to attach it to a patient's chart. The search window will be displayed if you do not drag it into the documents section of the patient's chart.



#### 5.3. Batch Scanning

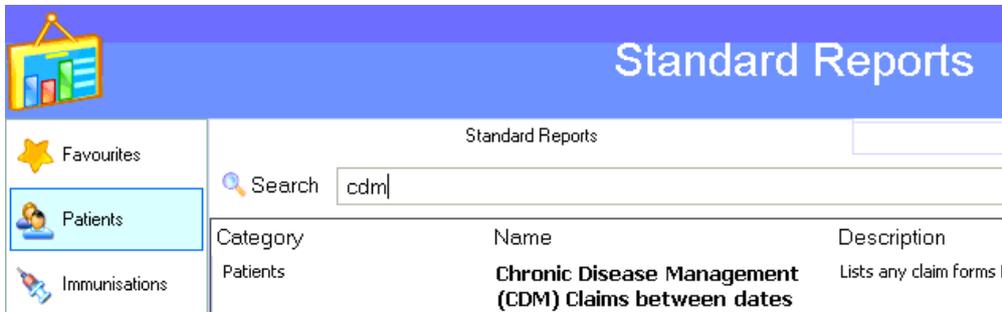
Use **Batch Scan** to scan dozens of pages at a time and then assign each page to the relevant patient on the same pc or on **another pc**. [Control Panel > Document Management System > Batch Scan](#). For network scanning click Network radio button. This allows another user in the practice to assign the scans to the correct patient's chart.



## 6. Reports

### 6.1. Searching

Use the Search field to quickly find the report you are looking for.



### 6.2. Favourites

Add your most used reports to Favourites for quicker access. Click  to mark the report as a favourite.



Click Favourites to view your most frequently used list.



### 6.3. Report Updates

Check for report updates regularly and download them. On the bottom left corner it will show if there are new or updated reports available to download.

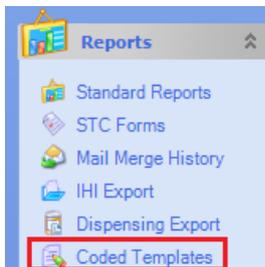


Select All the reports by using the top check all button and click **Install**.



### 6.4. Coded Templates

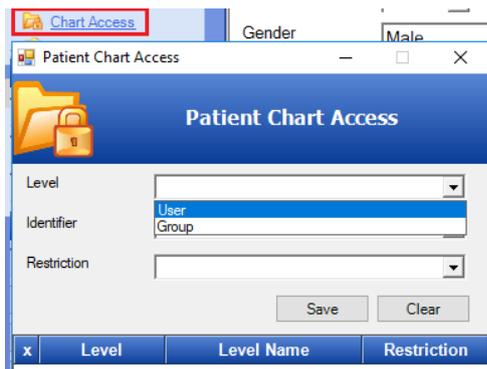
Create Coded Templates to use with the Patients with multiple conditions report.



Type 'Coded Templates' into the Search on the Resources page.

### 7. Restricted Access

Use Chart access restrictions to lock individual patient charts to particular users or particular groups of users in the Practice. Open Patient Registration and select the patient. Click Chart Access on the left-hand side explorer bar.



### 8. Socrates Server Manager

This application is only installed on certain machines in your practice generally Practice Manager.

Type 'Server Manager' into the Search on the Resources page.

#### 8.1. Access

Ensure that only those that require access to the Server Manager have access to it. To configure this option, log into the server manager.

- Select Maintenance > **Options**. Scroll down to **Service** and check 'Server Access Restricted' and click **Save**.
- Click User Accounts > **Server Access Accounts** tab. Add additional users by clicking the  beside their name or remove a user by clicking on the  beside their name. Do not remove 'Socrates Healthcare' user.

### 8.2. Reset Password

To reset a user's password, navigate to User Accounts and select the user from the list. Check Update Password and Force Reset. Enter a temporary password and click Update. Give the temporary password to the user. When they login with this password they will be asked to create their own password.

The screenshot shows a web form titled "User Login Details". At the top, there are two checkboxes: "Update Password" (checked) and "Force Reset" (checked). Below these is a dropdown menu for "Reset Password" with "Every 5 Years" selected. There are three text input fields: "User Name" containing "alan", "Password", and "Confirm Password". At the bottom, there are two buttons: "Update" with a green floppy disk icon and "Clear" with a green trash can icon.

### 8.3. User Permissions

Review User group Permissions to ensure that each group only has access to the areas of Socrates that they require. Ensure each member of staff is assigned to the appropriate Permission Group.

### 8.4. SMS Appointment Alerts

Use Socrates automatic Appointment Alerts to send an SMS to remind patients in advance of their appointment e.g. 1 day before.