

# socrates

## Socrates GP v3.3.0.3 Update User Manual February 2026

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### Socrates Message

*This manual documents the updates from release version 3.2.0.2 to 3.3.0.3 and includes updates to Suremed together with some user requests e.g. ability to cancel SMS messages in bulk and to cancel pending appointments when a patient is deactivated.*

*For all training materials 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**' and include as much information as possible.*

*For all other queries please email: [support@clanwilliamhealth.com](mailto: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 (Pippo)

If you use the Pippo Patient Portal, you can now copy and paste from the Online Appointment Viewer. Enter your search criteria of the list you want.

Select multiple rows using mouse and press CTRL + C on the keyboard.

Appt Date	Patient	DOB	Appointment Hcp	Type	Original Booking	Status	Created Date
05/12/2024 09:45	[Redacted]	05/11/2000	Brian Smith	General	Brian Smith	Appointment	29/11/2024
14/01/2025 09:15	[Redacted]	08/01/2000	Brian Smith	Electronic Messages	Brian Smith	Appointment	13/01/2025
14/01/2025 10:15	[Redacted]	05/11/2000	Brian Smith	Electronic Messages	Brian Smith	Cancelled	13/01/2025
14/01/2025 10:15	[Redacted]	05/11/2000	Brian Smith	Electronic Messages	Brian Smith	Appointment	13/01/2025

Open excel / word etc and click paste or press CTRL + V on the keyboard.

## 2. Patient Registration

If you change the Patient Status to inactive, deceased or archived in patient registration and the patient has future appointments you will be presented with a window displayed those pending appointments.

**Patient Type Details**

Patient Status: Active

Patient Type: Archived

Healthboard: Deceased

Click **Yes** to cancel all pending appointments for the patient.

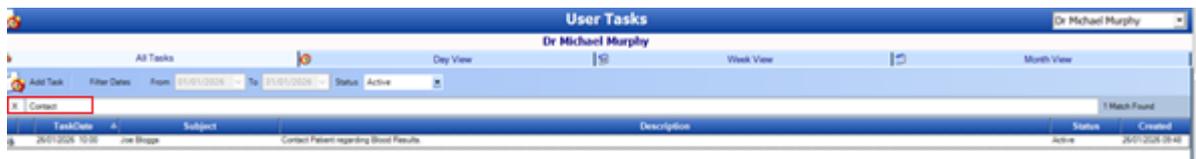
Date	Type	Site	HCP
13/02/2026 11:15	General	Master Surgery	Gáry Black
06/02/2026 11:15	General	Master Surgery	Gáry Black
30/01/2026 11:15	General	Master Surgery	Gáry Black
23/01/2026 11:15	General	Master Surgery	Gáry Black
16/01/2026 11:15	General	Master Surgery	Gáry Black
09/01/2026 11:15	General	Master Surgery	Gáry Black

Cancel pending appointments for this patient?

### 3. Tasks

#### Search

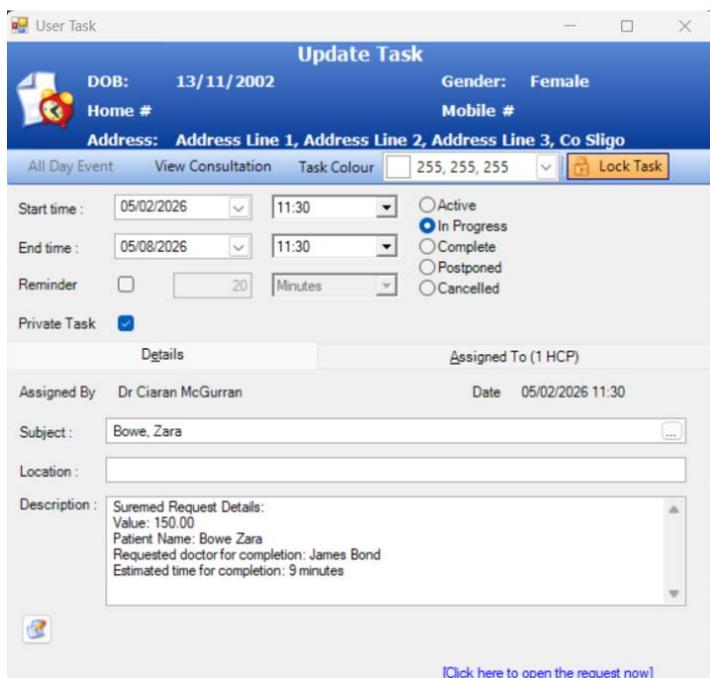
The Search bar is now visible by default in Manage Tasks.



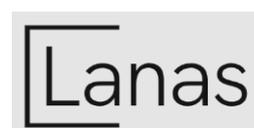
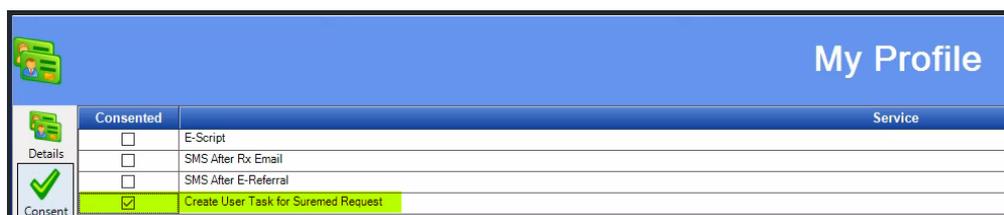
#### Suremed Task

A new task is created for all new Suremed requests and will be assigned to the doctor that is assigned to the Suremed request. The task will show the patient’s name, fee etc. Click the link to open the Suremed request directly.

The status of the task will be updated once the Suremed request is started / completed.



Should you not want the task to be created you can disable this option in My Control Panel > My Profile > Consent.



## 4. Consultation

### 4.1. Letters

New appointment merge fields added to Patient Details.

- Next Appointment DateTime
- Next Appointment Type
- Next Appointment HCP

### 4.2. Immunisations

Schedule dropdown list updated to only show the correct electronic childhood schedule based on the patient's age. For a baby born 01/10/2024 onwards you will only see the **'Childhood Schedule 2024'**.



A new MMR (Baby) vaccination schedule has been added for you to use for any child getting the MMR early (for example, Travel). This claim must be submitted via paper.



If you try to administer the MMR in the Childhood Schedule early you will receive an error message as it cannot be administered until at least 2 weeks before its due date.

**Administer Shot**  
Name: Child, Keith | M | Teeling Laine, Barrackstown, Co Westmeath, N91P0E0  
DOB: 03/10/2025 (0 yr 3 m)

Schedule: 24/09/2025 | Childhood Schedule 2024

Course: Rotavirus 2024, 6 in 1 2024, Men B 2024, PCV 2024, MMR 2024

Record Shot Details

Patient Consent: Yes

Responsible Hcp: Gary Black

For Contract Number: 22123

Patient County: Westmeath

Patient PPSN: 8468236M

This shot cannot be given 2 weeks before its due date. If early administration is for travel related reasons, please add the MMR (Baby) schedule separately.

Administered Elsewhere

Next Close

E-Vaccine Submissions: When an eVaccine is saved an additional check to ensure that another user in the practice has not already saved the same shot.

**Administer Shot**  
Name: Bloggs, Baby1 | M | Ad1, Ad2  
DOB: 01/10/2024 (1 yr 3 m)

Schedule: 28/01/2026 | Childhood Schedule 2024

Course: Rotavirus 2024, 6 in 1 2024, Men B 2024, PCV 2024, MMR 2024

Record Shot Details

Immunisation: Rotavirus | Method: Oral

Date Due: 01/12/2024

HCP / Vaccinator: Doctor2 Tes

Hcp Number (MCN): 265853

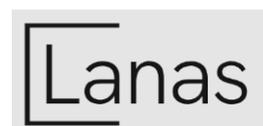
Date Given: 28/01/2026

Patient Immunisation: Administration details for this shot have already been recorded by another user. Please reload.

OK

### 4.3. 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. The Scheduled time is now sent with the SMS so your text message will be sent at the future date / time selected.



## 5. My Control Panel

### 5.1. Result Viewer

The Source column has been added to Result Viewer > Coop/Discharges.

Date	Type	Source	Patient	DOB	HCP
17/06/2025	Outpatient Clinic Letter	Seclis TEST - LUH Oncology - Mr. George Philip	healthlink, eMessage	23/12/1991	Brian Smith

### 5.2. Claim Tracking

Overall improvements to increase the time to takes for Claim Tracking to load and the CDM Accepted list.

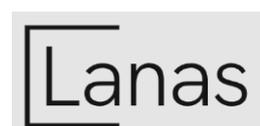
#### Forms

A PPSN column has been added to Claim Tracker > Forms.

Date	Form	Patient	DOB	PPSN	Gms #	Ref #
------	------	---------	-----	------	-------	-------

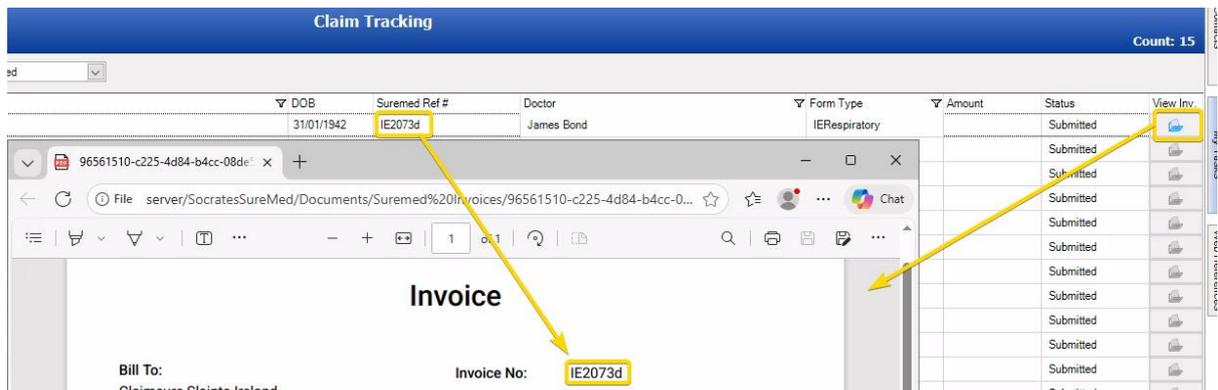
#### Suremed

- Column added to Claim Tracker for 'Form Type' and 'Amount'.



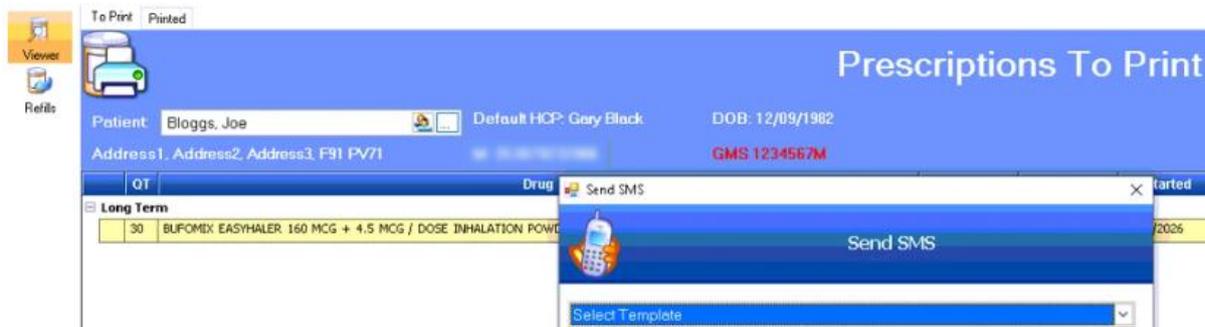


- Click the View Invoice button in the Claim Tracker to open the Invoice.



### 5.3. Prescription Viewer

Clicking mobile number will now open the Send SMS window.



### 6. Communication > SMS

A **Cancel All** button has been added which will allow you to bulk cancel any selected messages that are able to be cancelled.



Date	Name	Mobile No	Message	Status	Sent By
18/12/2025 08:59	Adams, Angel	0875552138	Dear Angel, your prescription has been sent.	Cancelled	Gáry Black
07/10/2025 08:49	Chen, PC2016	0875552138	Dear PC2016, your General appointment is	Cancelled	Gáry Black
29/05/2025 09:52	Adams, Angel	0875552138	Dear Angel Adams, I hope you get this mess	Cancelled	Gáry Black
02/09/2022 09:58	Adams, Angel	0875552138	Dear Angel, your prescription has been sent.	Cancelled	Gáry Black
14/07/2021 11:37	Adams, Angel	0875552138	Dear Angel Adams, I hope you get this mess	Cancelled	Gáry Black
11/03/2006 15:16	test test	0875781343	quintiles	DeliveryError	Socrates Healthcare
08/02/2006 20:19	Plovers, Fred	0875521138	Please call around to the surgery for your test	DeliveryError	Socrates Healthcare
03/02/2006 14:30	Plovers, Fred	0875521138	Your prescription is over due to be collected	DeliveryError	Socrates Healthcare
02/02/2006 13:35	Bark, A	0875521138	Your test results have come back. ring the su	DeliveryError	Socrates Healthcare
20/12/2005 18:18	Plovers, Fred	0875521138	Your test results have come back. ring the su	DeliveryError	Socrates Healthcare
20/12/2005 18:18	Plovers, Fred	0875521138	Your test results have come back. ring the su	DeliveryError	Socrates Healthcare
15/12/2005 18:20	Plovers, Fred	0875521138	0875521138	DeliveryError	Socrates Healthcare
14/12/2005 15:44		0875521138	Your prescription is over due to be collected	DeliveryError	Socrates Healthcare

## 7. 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.

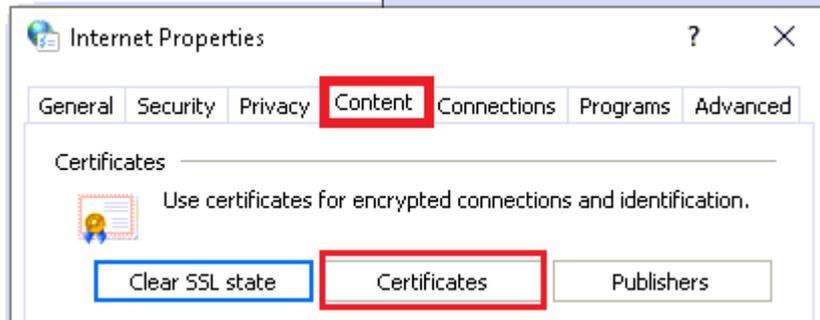


- **Prescriptions Printed between dates:** Report updated to include a 'User' dropdown and 'Include Instructions' checkbox.
- **Patient Attendance between dates:** Report updated for Pippo appointments.
- **Childhood Immunisations:** Checkbox added to exclude electronic claims.

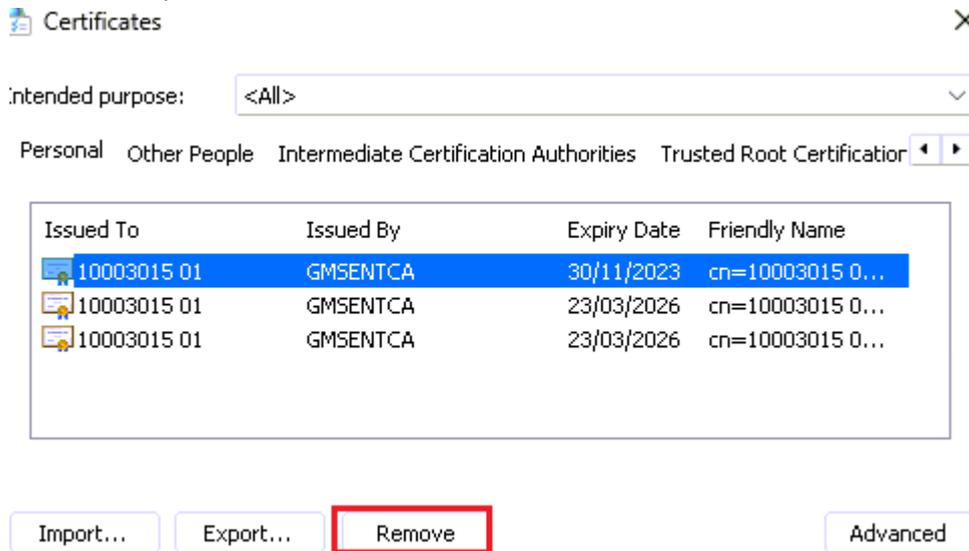
## 8. Tasks / Bugs

- PCRS Certificates
  - Socrates has updated the way it searches for PCRS Certificates.
  - When you install a new PCRS Certificate ensure you delete all EXPIRED PCRS Certs and Socrates will automatically select this cert.

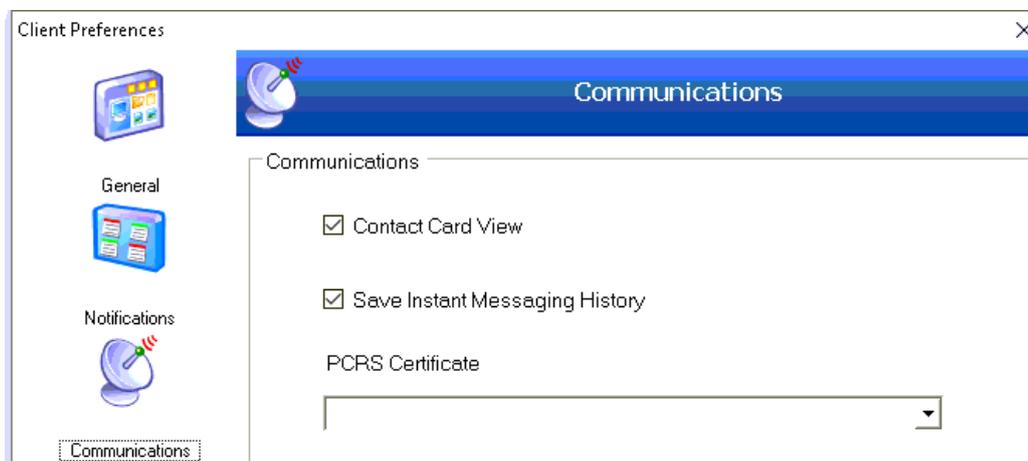
Type Internet Options into Search bar on your machine and select Content tab. Click Certificates.



Select the expired cert and click Remove.



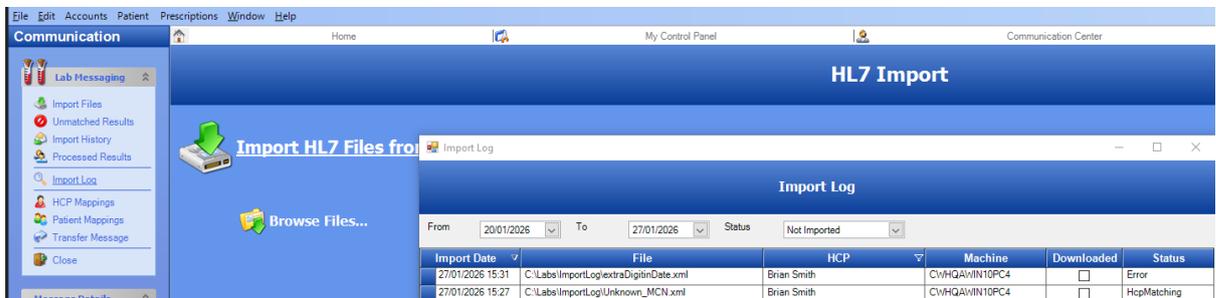
- o If you have more than 1 PCRS Certificate you will need to select the correct certificate in Edit > Preferences. Select Communication.



- Healthmail Prescription Template
  - Existing Healthmail prescription template updated to include the date of birth for all patients.
  - Should you not want to include the date of birth for all patients open Edit > Preferences > Printers and Scanners – Prescriptions tab and select the template called 'Default no DOB'.



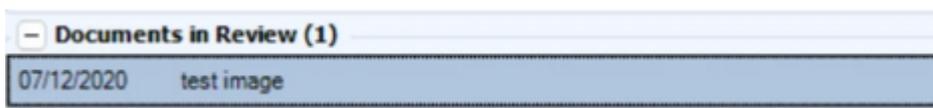
- Waiting Room – Eircode is displayed in the patient header.
- SMS Templates
  - Template categories and closed by default except from Prescriptions. You can single click to expand another category.
- Phone Directory - Email field added.
- Import Log
  - New status added for Not Imported which will show ALL the files that were not imported into Socrates and which need to be. This report should be run daily to ensure you are not missing any electronic responses.



- Actions > Documents in Review

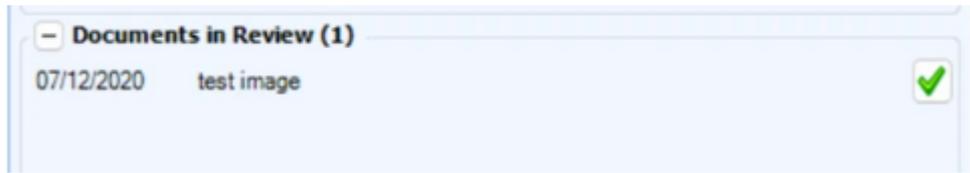
If you have the 'Mark Reviewed by Assigned User Only' option enabled, then only the user assigned to review the document can mark it as Read from Documents in Review panel in the patient's chart.

- When user is not the assigned user the check mark will not be displayed.

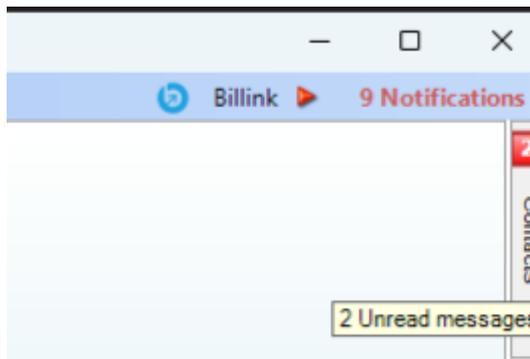


- When user is the assigned user the check mark will not be displayed.

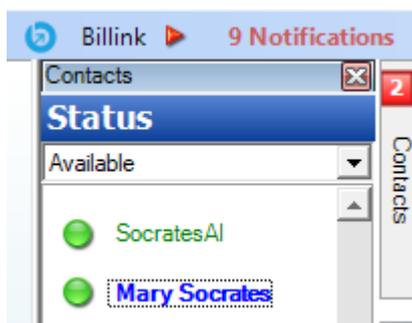




- Standard Scripts - Drug instructions can now be removed from Standard Scripts.
- Alliance Update (3.2.0.5)
  - When checking for a response Socrates will only check the referrals which have a status of Delivered.
  - Referral Response Preview Page only shows Overall status.
  - Response marked as Read no longer appears in the Referral Responses list.
- Instant Messaging (3.2.0.5)
  - Unread message counter added to Contacts tab. When the value is more than 9 unread messages it will show “9+”



- Contacts will appear in Bold in the Contact list if there is an unread message from that contact.



- Opening an IM window with unread messages or bringing it into focus will reset the Unread message count for that user.
- Instant Messaging Title bar show name of contact you are messaging.

