



DID YOU KNOW

In Socrates it is essential to ensure that all users complete their tasks, investigations, documents in review and Referral Response messages once they are reviewed / finished.

1. If these items are left to build up, this will slow your Socrates system down as it needs to load unnecessary tasks, investigations etc.
2. When you complete items as soon as you are finished with them the screens are less cluttered making it easier and faster to locate tasks / investigations etc.
3. Your notifications will only show new items for your attention making them more usable.
4. The Actions section of the patient's chart is more beneficial as it will only show new items for your attention.

Notifications: To quickly find all areas that require your attention, click Notifications and click each section and work through the list.

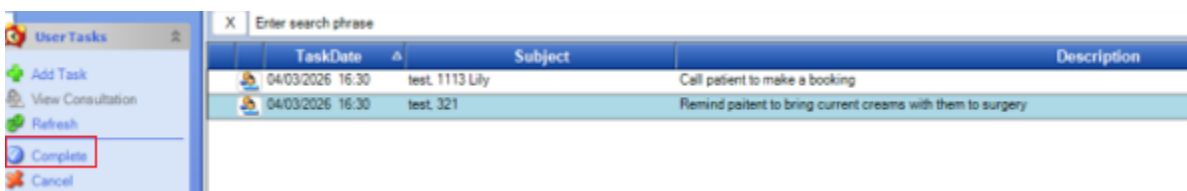


Actions (Consultation): In the patient's chart select Actions & Tasks tabs on the right-hand side and work through the list.



1. Tasks:

Open **My Tasks** and click Manage. A list of your active tasks will be displayed.



To complete a task, highlight the task and click **Complete**. To complete more than one task, highlight the tasks and click Complete.

2. Lab Messaging > Unmatched

Open **Communication >> Lab Messaging**. If you have Unmatched results these need to be matched to a patient in Socrates otherwise patients will be missing their clinical data.



Select each category and match the message to the correct patient. A message box is displayed in the bottom right of the screen with the patient demographics in the message.



Labs – Double click on the unmatched result and search for the patient.

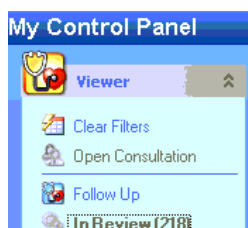
For the other tabs select the unmatched message and click **Assign to Patient**.



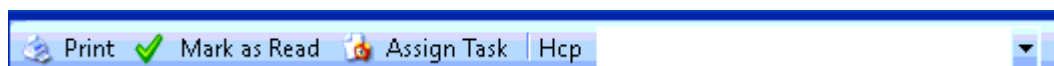
3. Result Viewer

1. In Review

Open **My Control Panel >> Result Viewer**. Select **In Review**. Select each category, filter by HCP, and review each message. Once reviewed mark it as completed / read to remove it from the In Review queue.



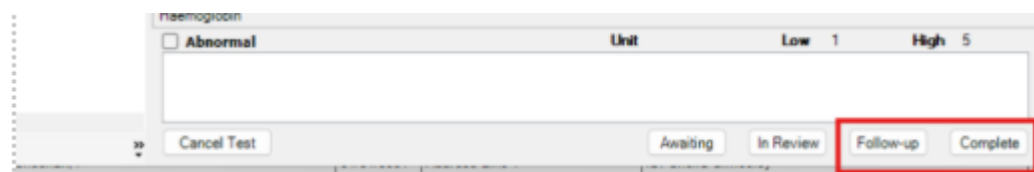
Click **Referral Responses** to view the responses you get back from electronic referrals sent on behalf of patients. Select each referral to read the response and click 'Mark as Read'.



Click **Investigations** and select **Electronic** and **My Queue** to view lab results.



Double click to view the result as not all abnormal results are flagged by the lab. Click **Complete** or **Follow-Up** for each one.



You can batch complete from the patient's chart. Select one of the results and click **Open Consultation**. Click **Investigations** and multi select the investigations that are **In Review**. Click **Complete**. Use filter if patient has numerous labs.

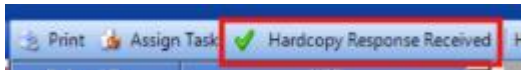


2. Awaiting

Open **My Control Panel >> Result Viewer**. Select **Awaiting**. Select each category, filter by HCP, and review each message.

Click **Referral Messages** to view the referrals which are awaiting a response.

Referral messages outstanding a response over 14 days show in red font. If you have received a response via paper, select the referral or multi-select and click 'Hardcopy Response Received'. If no response received follow up with the hospital.



Referral messages appearing in purple did **not** get sent via healthlink. To resend / delete these messages, select the message and click Open Consultation. Open Documents and select the e-Referral to resend or delete.

Category	Referral Type	HCP
Investigations (377)	Sent	Patient
	DOB	Address
	General Referral	Dr Sheila Gilhooley
Referral Messages (35)	04/03/2026	ANTHONY GABBOTT
	19/03/1947	Address Line 1
	General Referral	Dr Sheila Gilhooley
	10/09/2025	1113 mylesm TEST
Radiology Orders	01/04/1965	SHESHESHE
	General Referral	Dr Jack Bannigan
	17/07/2025	1113 mylesm TEST
	01/04/1965	SHESHESHE
	General Referral	Dr Louise Murray
	16/07/2025	1113 mylesm TEST

3. Follow Up

Open **My Control Panel >> Result Viewer**. Select **Follow Up**. Select each category, filter by HCP, and review each message.

4. Documents in Review

Open **My Control Panel >> Document Reviewer** and filter the HCP list to yourself. Double-click the document to read it. Close document and click Mark Read.

Line 3, Co Sligo					
<input checked="" type="checkbox"/> Mark Read <input type="checkbox"/> Edit <input type="checkbox"/> Print <input type="checkbox"/> Add Task <input type="checkbox"/> Transfer <input type="checkbox"/> Change HCP <input type="checkbox"/> Clear Filters <input type="checkbox"/> Refresh					
Patient		HCP		Dates	
Date	Description	Patient			
04/03/2026	MRI Letter dated Feb 12th 2026	GABBOTT, ANTHONY		Dr Sheila Gilhooley	
17/12/2025	Test 2	Test ADAM		Dr Louise Murray	

This document will then move to the Reviewed section and can be viewed by clicking on Reviewed.