

Requires Socrates Version 3.5.0.3 or later.

1. Socrates AI

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.

If a request exceeds the limit on the model used (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.

Audit details are retained for every AI request submitted to track usage. **No patient data is retained.**

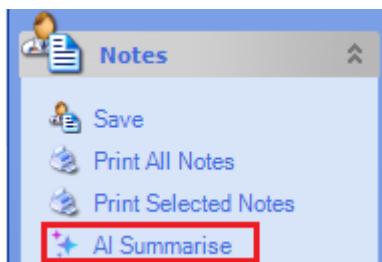
After your practice reaches the daily free limit, you can enter your practice contact details to subscribe to Premium Access.

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.

1.1. AI Summarisation

1. Notes Summarisation

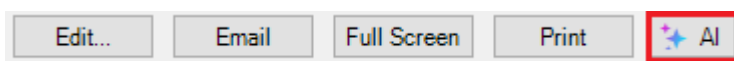
All patient notes excluding Private Notes are submitted to the model when you press 'AI Summarise'.



- 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.

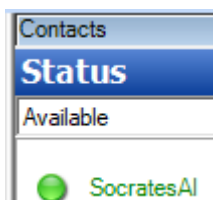
2. Individual Document Summary – (JPEG, JPG, TIFF, PNG, BMP, PDF & DOCX files)

You can get an AI Summary of the document by selecting it and clicking the AI button.

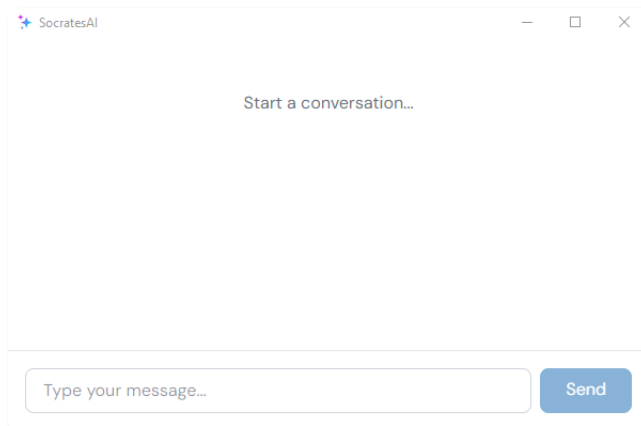


1.2. Socrates AI Chat

This is a continuous chat with 'Socrates AI', building on the previous questions asked.



To clear the chat, close the conversation window.



1.3. AI Scribe

An **AI Assistant** menu item has been added to Consultation and is visible when the Consultation is in Edit mode. Click **Start** to launch AI Scribe.



When a scribe window is launched in a patient's chart the menu will update to show that it is **Open**.



1.3.1. Logging in as Doctor

An 'Open AI Assistant' checkbox has been added to the **Begin Consultation** window. If checked it will launch the AI Assistant.

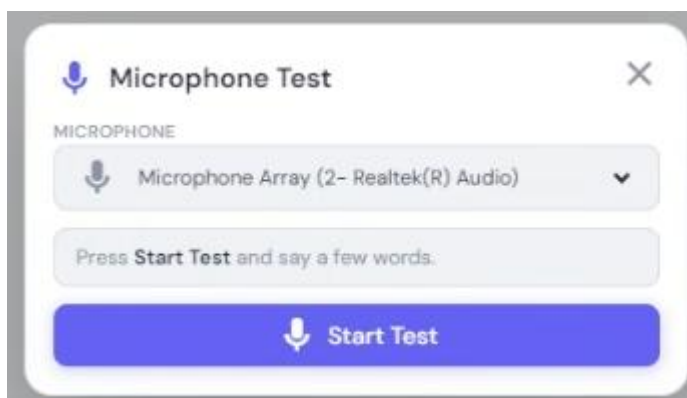
When logged in as a Doctor, **'Open AI Assistant'** will be checked by default.

If the doctor user wants to disable this checkbox they can open Edit > Preferences > **Web & AI Features** and select the AI tab. Uncheck this preference and click **Save**.

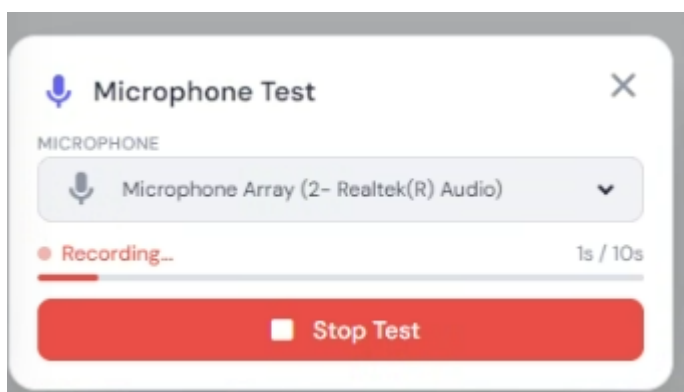


1.3.2. Microphone Testing

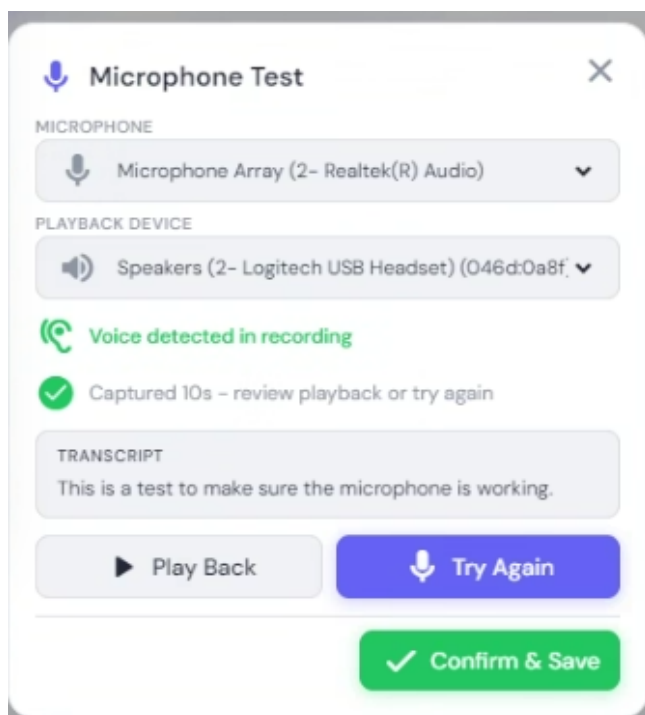
The first time AI Scribe is used or if a new microphone is added, you will be asked to test the microphone. Select the microphone from the dropdown list and click **Start Test**.



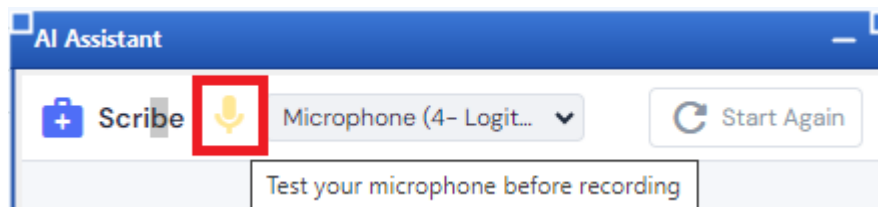
Speak a few words into the microphone.



Once the microphone is working correctly click '**Confirm & Save**'.

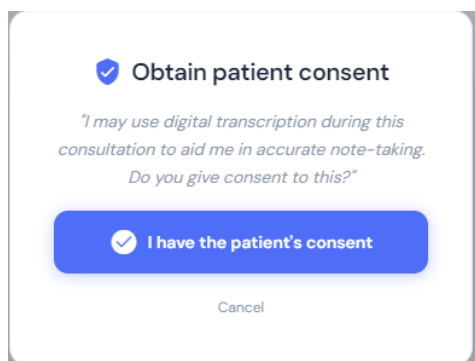


To test your microphone at any time, click the microphone icon to repeat the test.



1.3.3. Patient Consent

Patient Consent is taken the first time AI Scribe is used for a patient. You can only proceed when you click 'I have the patient's consent.'



Consent can be updated at any time from Patient Registration > Extra Patient Details – Consent tab.

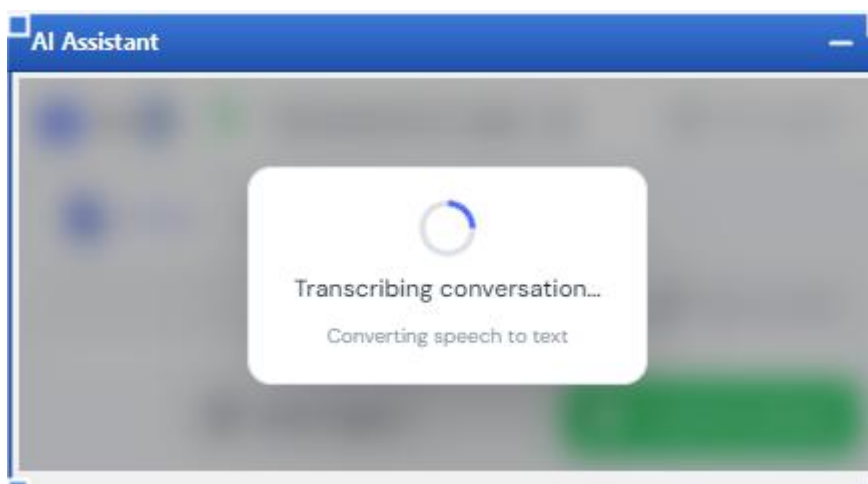
Consent	Description
☐ Y ☐ N	E-Script
☐ Y ☐ N	Social Welfare E-Cert
☒ Y ☐ N	AI Listening

1.3.4. Complete an AI Scribe

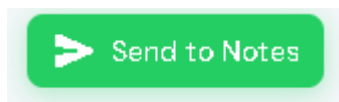
To start using AI Scribe click **Listen**.

You can **Pause** recording at any time and then click **Resume** to continue.

When finished, click **Complete**. The conversation will be transcribed and an AI Note generated based on the AI prompt.



Click **Send to Notes** to save this AI note to the patient's chart. This will finish the AI Scribe.

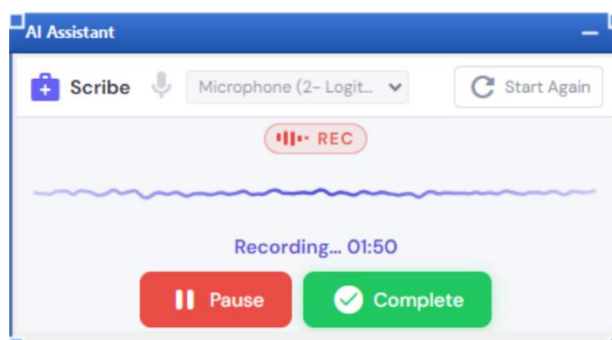
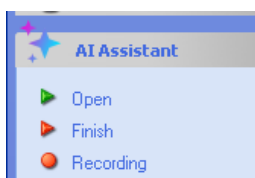


All notes generated using AI Scribe will have an AI flag in Consultation Notes. You can modify the note as required, then click **Save**.

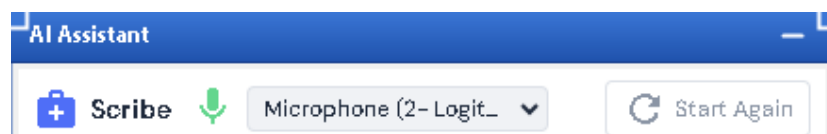
	Date	Type
	05/05/2026	Note

1.3.5. Notes

1. When AI Scribe is listening, it will show 'Recording' in the AI Assistant (Explorer bar) and 'Recording' on the AI Scribe (minimized) window.



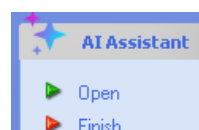
2. Click  to minimize the AI Assistant.



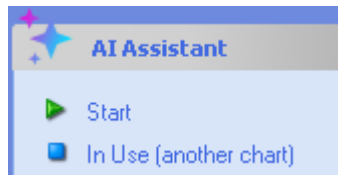
3. Click **Open** from AI Assistant (Explorer bar) to maximise it again.



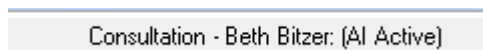
4. Clicking **Finish** will close the AI Assistant **WITHOUT** saving the recording and no AI note will be saved to the patient's chart.



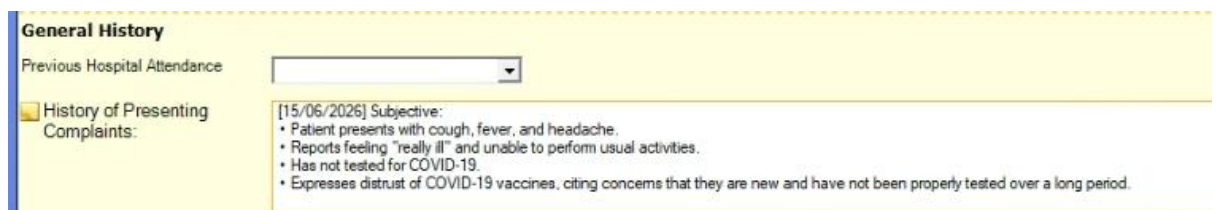
5. AI Scribe can only be launched in one patient's chart at a time. AI Scribe will show 'In use (another chart)'.



The Consultation tab will show (AI Active) for the consultation which has AI Scribe launched.



6. Patient Referrals
 - a. If you add an E-Referral for the patient, today's note (AI Scribe) will populate by default.



- b. If you add a letter for the patient, you can default the letter template and bring in today's note (AI Scribe) or use Add-ins > Notes to select today's note.

