

socrates

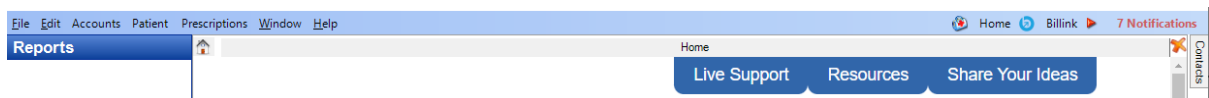
Socrates GP v3.5.2.1 Update User Manual July 2026

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Socrates Message

This manual documents the updates from release version 3.5.1.4 to 3.5.2.1 and includes some customer change requests.

*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.*

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

Appointments preference added to allow you to choose how many HCP's to show on the Appointment diary by default. You can select between 5 and 30. This is available from Edit > Preferences and select the Appointments tab.

Appointments

Refresh Appointments every Seconds

☒ Colour Appointments by Appointment Type

☒ Define Exceptions by Right Click

Timeslot Available Color 193, 210, 219 ▼

Timeslot Unavailable 151, 165, 194 ▼

Default HCP Add Group [ALL] ▼

Default Selected Appt Group ▼

Default Site Location ▼

Appointment Diary Columns 5 ▲▼

2. Patient Maintenance

2.1. Patient Summary

The appointment note can be viewed by hovering over the note icon in Patient Summary > Visit History.

Name : Joe Bloggs

Nationality :

Patient Status :

DOB : 31/12/1950 (75 yr 6 m)

PPSN : 1234567T

Patient Type :

Visit History

	Date ▼	Type ▼	Duration	
Details	07/07/2026	General	15	Master Surg

2.2. Historical Data

The PPSN has been added to Historical Data. This will record PPSN changes from this version onwards.

The screenshot shows the 'Patient Details' form in the Socrates application. The form is divided into two main sections: 'Patient Details' and 'GMS Details'. The 'Patient Details' section includes fields for Unique Number (0000184), Phone, Mobile, Address (ad1, ad2), Blood Group, Default HCP (jenny test), and Registered (14/05/2026 by Brian Smith). The 'GMS Details' section includes fields for Patient Type (Private), GMS Status, GMS Doctor, Doctor GMS, GMS Number, GMS Review, and GMS District. A 'Historical Data...' link is present under the Address field. A 'Historical Information' dialog box is open, showing a 'Type' dropdown menu with 'PPSN' selected and a 'Last Used' dropdown menu with 'PPSN' selected.

3. Documents

A new option has been added to the Server Manager > Maintenance > Options to set the 'For Review' dropdown when saving a document as a mandatory field.

The screenshot shows the 'Socrates Server Management' application window. The 'Maintenance' tab is selected, and the 'Options' sub-tab is active. The 'Options' dialog box is open, showing a 'Documents' section with a 'Reviewer Required' checkbox. The 'Reviewer Required' checkbox is currently unchecked.

When Reviewer Required is checked, all users will have to select a HCP from the 'For Review' dropdown list when saving a document / scan.

The screenshot shows a 'For Review:' dropdown menu. The dropdown is currently empty. Below the dropdown are 'OK' and 'Cancel' buttons. A 'Reviewer required' message is displayed in a yellow box next to the 'Cancel' button.

4. Consultation > Immunisations

- A tooltip has been updated for all eVaccines to show the Claim ID and the PRCS rejection if the claim is rejected.

Immunisations						
	Due	Given	Shot	Num	Batch	
	01/12/2025	01/07/2026	Rotavirus		AROLE436AC	Dr Mic
Electronic Claim Rejected Claim ID: 102081907 Reimbursement rejection: PCRS records indicate patient [4983750PE] not eligible on treatment/exam date [20260701] due to age [20251001]. This person [4983750PE] has already received shot [1] on [01-12-2025]. Please contact Doctor's Unit (email: pos.						

Immunisations				
	Due	Given		
	01/12/2025	01/06/2026	Rotavirus	
	01/12/2025	01/06/2026	5 in 1	
	01/12/2025	01/06/2026	Men B	
	01/12/2025	01/06/2026	PCV	
	01/08/2026		5 in 1	
Electronic Claim Accepted Claim ID: 102081943				
			Men B	

- When adding a recurring schedule, e.g. Influenza, an electronic icon will be displayed beside any e-Vaccines in the Schedule dropdown list.

Add Recurring Schedule

Add Recurring Schedule

Schedule

Start Date

Covid-19 Booster

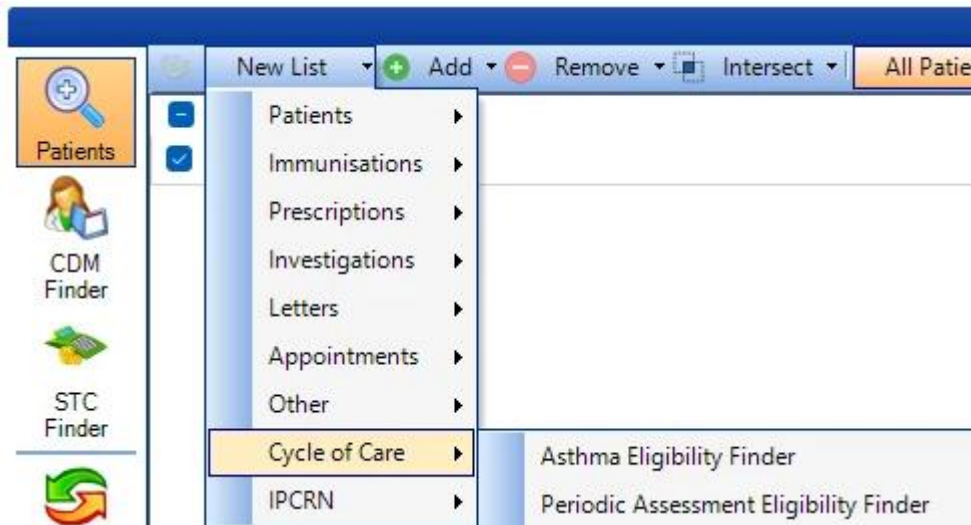
Influenza

Pneumococcal

- Validation added to 'Date Given' to ensure that it is on / after the patient's date of birth.

5. Bugs / Tasks

- Billink
 - Sync check performed during the HL7 download electronic message process to ensure two syncs are not performed at the same time.
- Claim Tracking will no longer show rejected e-Vaccines which have been cancelled.
- Healthlink stylesheets updated for Prostate and Lung Cancer referrals.
- Lab Order Printout updated to prevent overlapping of text on the footer.
- Cycle of Care reports added to the Finder Tool.



- For Socrates Cloud customers that use Video Consultations, the QR code will load by default allowing you to complete the video consultation on your local device.

