

# socrates

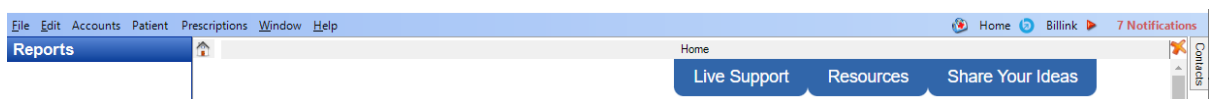
## Socrates GP v3.3.0.2 Update User Manual February 2026

1. Appointments (Pippo).....	1
2. Patient Registration .....	2
3. Tasks.....	2
4. Consultation .....	4
4.1. Letters.....	4
4.2. Immunisations .....	4
4.3. Prescriptions .....	5
5. My Control Panel .....	6
5.1. Result Viewer.....	6
5.2. Claim Tracking .....	6
5.3. Prescription Viewer .....	7
6. Communication > SMS .....	7
7. Reports .....	8
8. Tasks / Bugs.....	8

### Socrates Message

*This manual documents the updates from release version 3.2.0.2 to 3.3.0.2 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).*

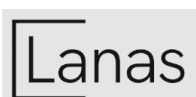
*We hope you continue to enjoy using our product and we look forward to receiving your continued feedback and ideas.*

*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.

Online Booking Viewer							
From	26/01/2020	To	26/01/2025	<input checked="" type="radio"/> Accepted	<input type="radio"/> Declined	Enter Patient Name	
Appt Date	Patient	DOB	Appointment Hcp	Type	Original Booking	Status	Created Da
05/12/2024 09:45		05/11/2000	Brian Smith	General	Brian Smith	Appointment	29/11/2024
14/01/2025 09:15		08/01/2000	Brian Smith	Electronic Messages	Brian Smith	Appointment	13/01/2025
14/01/2025 10:15		05/11/2000	Brian Smith	Electronic Messages	Brian Smith	Cancelled	13/01/2025
14/01/2025 10:15		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	Active Archived
Healthboard	Deceased Inactive

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

Cancel Pending Appointments				
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?				
				Yes No

## 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.

Consented	Service
<input type="checkbox"/>	E-Script
<input type="checkbox"/>	SMS After Rx Email
<input type="checkbox"/>	SMS After E-Referral
<input checked="" type="checkbox"/>	Create User Task for Suremed Request

## 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.


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.

### 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.


e-Prescription Success

**Prescription SMS**

  
**Success!**

Your Healthmail ePrescription has been sent. Use one of the options below to notify or charge your patient.

**Send SMS**    Send Billink

To:  +353 (87)

Dear <<PatientFirstName>>, your prescription has been sent to <<PharmacyName>>.

Enter SMS Message 55 | 1 Message

Dear Test, your prescription has been sent to Pharmacy.  
Kind regards,  
Socrates Practice

☒ Schedule for Later    07/11/2025 10:00

**Send**    **Close**

## 5. My Control Panel

### 5.1. Result Viewer

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

Clear Filters							Add Task	Complete
Date	Type	Source	Patient	DOB	HCP			
17/06/2025	Outpatient Clinic Letter	Sadha 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.

#### Forms

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

**Claim Tracking** Count: 13

**Category** **Forms**

**Category** From 01/01/2000 To 31/01/2026 Status Not Sent **Print**

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

#### Suremed

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

Claim Tracking									
Category	SureMed								
Category	From: 28/01/2025	To: 28/01/2026	Status: Submitted						
Created Date	Patient	DOB	Suremed Ref #	Doctor	Form Type	Amount			
28/01/2025 14:46		31/01/1942	IE2073d	James Bond	IERespiratory	99			

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

The screenshot shows the 'Claim Tracking' window with a table of claims. The 'View Inv.' button in the 'Status' column is highlighted with a yellow box. A yellow arrow points from this button to a browser window that displays an 'Invoice' for 'IE2073d'. The invoice details include 'Bill To: Claireura Santa Ireland' and 'Invoice No: IE2073d'.

### 5.3. Prescription Viewer

Clicking mobile number will now open the Send SMS window.

The screenshot shows the 'Prescriptions To Print' window. It displays patient information for 'Bloggs, Joe' and a list of prescriptions. A 'Send SMS' button is highlighted with a yellow box. A yellow arrow points from this button to a 'Send SMS' dialog box that appears over the prescriptions list. The dialog box has a 'Select Template' dropdown and a 'Send SMS' button.

## 6. Communication > SMS

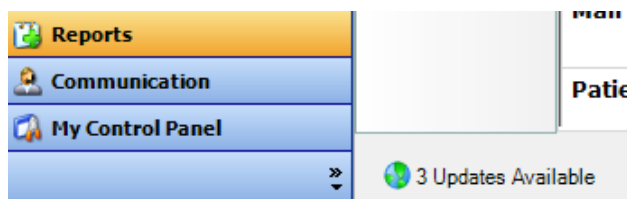
A **Cancel All** button has been added which will allow you to bulk cancel any selected messages that are able to be cancelled.



Status	Date	Name	Mobile No	Message	Status	Sent By
	18/12/2025 08:59	Adams, Angel	0875555555	Dear Angel, your prescription has been sent.	Cancelled	Gáry Black
	07/10/2025 08:49	Chad, PC/2016	0875555555	Dear PC/2016, your General appointment is	Cancelled	Gáry Black
	29/05/2025 09:52	Adams, Angel	0875555555	Dear Angel Adams, I Hope you get this mess	Cancelled	Gáry Black
	02/09/2022 09:58	Adams, Angel	0875555555	Dear Angel, your prescription has been sent.	Cancelled	Gáry Black
	14/07/2021 11:37	Adams, Angel	0875555555	Dear Angel Adams, I Hope you get this mess	Cancelled	Gáry Black
	11/03/2006 15:16	test test	0875785343	april/kyle	DeliveryError	Socrates Healthcare
	08/02/2006 20:19	Flonore, Fred	0875555555	Please call around to the surgery for your test	DeliveryError	Socrates Healthcare
	03/02/2006 14:30	Flonore, Fred	0875555555	Your prescription is over due to be collected	DeliveryError	Socrates Healthcare
	02/02/2006 13:35	Bandy, Al		Your test results have come back, ring the su	DeliveryError	Socrates Healthcare
	20/12/2005 18:18	Flonore, Fred	0875555555	Your test results have come back, ring the su	DeliveryError	Socrates Healthcare
	20/12/2005 18:18	Flonore, Fred	0875555555	Your test results have come back, ring the su	DeliveryError	Socrates Healthcare
	15/12/2005 18:20	Flonore, Fred	0875555555	0875555555	DeliveryError	Socrates Healthcare
	14/12/2005 15:44		0875555555	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.

Install

Available Reports				
<input checked="" type="checkbox"/>	Report	Published	Type	Status

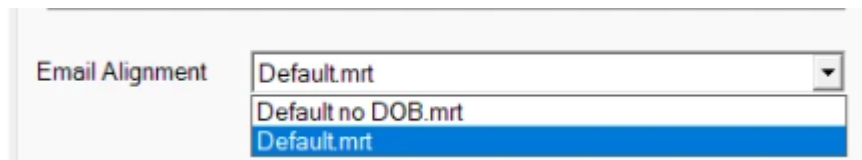
- **Prescriptions Printed between dates:** Report updated to include a 'User' dropdown and 'Include Instructions' checkbox.
- **Patient Attendance between dates:** Report updated for Pippo appointments.
- **Childhood Immunisations:** Checkbox added to exclude electronic claims.

## 8. Tasks / Bugs

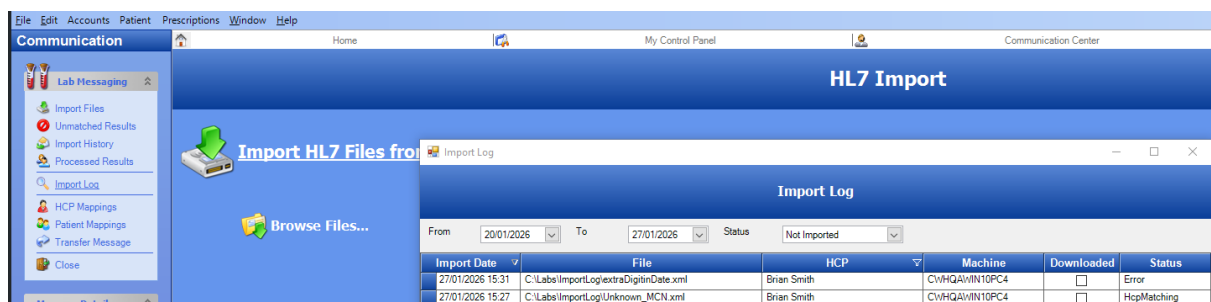
- Healthmail Prescription Template
  - Existing Healthmail prescription template updated to include the date of birth for all patients.



- 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.



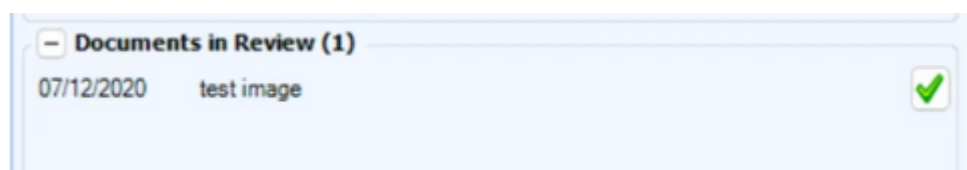
- Actions > Documents in Review

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.

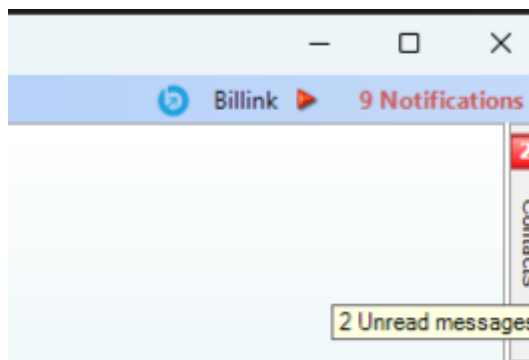
- When user is not the assigned user the check mark will not be displayed.



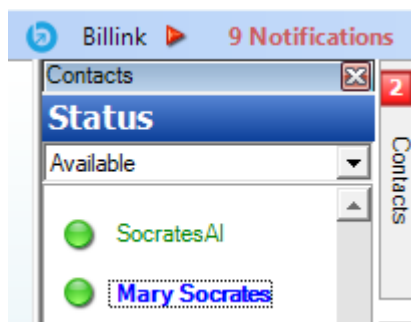
- When user is the assigned user the check mark will not be displayed.



- 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.

