

# Socrates

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

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### Socrates Message

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

*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 Date	
05/12/2024 09:45	Patient 1	05/11/2000	Brian Smith	General	Brian Smith	Appointment	29/11/2024	
14/01/2025 09:15	Patient 2	08/01/2000	Brian Smith	Electronic Messages	Brian Smith	Appointment	13/01/2025	
14/01/2025 10:15	Patient 3	05/11/2000	Brian Smith	Electronic Messages	Brian Smith	Cancelled	13/01/2025	
14/01/2025 10:15	Patient 4	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.



## 3. Tasks

### Search

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

The screenshot shows a software window titled 'User Tasks' for 'Dr Michael Murphy'. At the top, there are buttons for 'Add Task', 'Filter Dates', and 'Search'. The search bar contains the text 'Contact'. Below the search bar, there are tabs for 'Day View', 'Week View', and 'Month View'. A table lists tasks, with one task highlighted: 'TaskDate: 26/01/2026 10:00', 'Subject: Joe Bloggs', and 'Description: Contact Patient regarding Blood Results'. The status is 'Active' and the created date is '26/01/2026 09:40'.

### 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.

The screenshot shows a 'User Task' dialog box titled 'Update Task'. It displays patient details: DOB 13/11/2002, Gender Female, Home # (partially visible). The 'Address' field shows 'Address Line 1, Address Line 2, Address Line 3, Co Sligo'. Under 'Task Colour', the value '255, 255, 255' is selected. The 'Lock Task' button is highlighted. Task details include 'Start time: 05/02/2026 11:30', 'End time: 05/08/2026 11:30', 'Reminder: 20 Minutes', and 'Status: In Progress'. The 'Private Task' checkbox is checked. The 'Details' section shows 'Assigned To (1 HCP)' and 'Assigned By: Dr Ciaran McGurran' with the date '05/02/2026 11:30'. The 'Subject' field contains 'Bowe, Zara'. The 'Description' field contains the text: 'Suremed Request Details: Value: 150.00 Patient Name: Bowe Zara Requested doctor for completion: James Bond Estimated time for completion: 9 minutes'. At the bottom, there is a link '[Click here to open the request now]'.

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

The screenshot shows the 'My Profile' section with a 'Consent' tab selected. The 'Consent' table has the following rows:

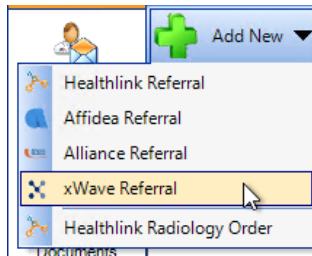
	Consented	Service
Details	<input type="checkbox"/>	E-Script
	<input type="checkbox"/>	SMS After Rx Email
	<input type="checkbox"/>	SMS After E-Referral
Consent	<input checked="" type="checkbox"/>	Create User Task for Suremed Request

## 4. Consultation

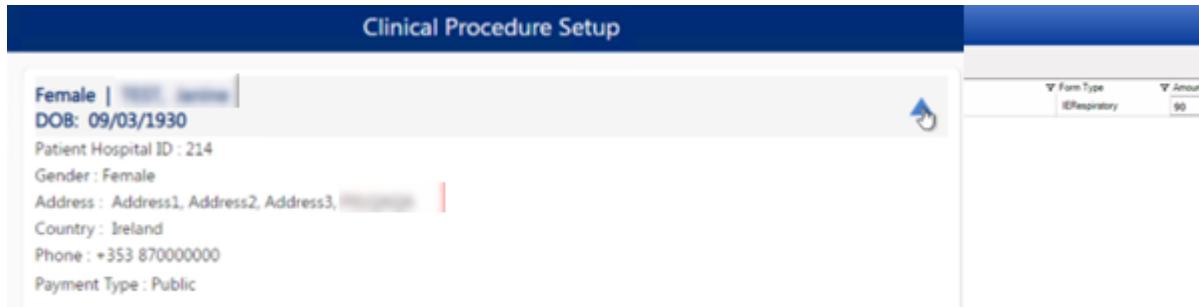
### 4.1. XWave Referrals – electronic radiology referral

For more information on Xwave click here <https://www.xwave.ie/>

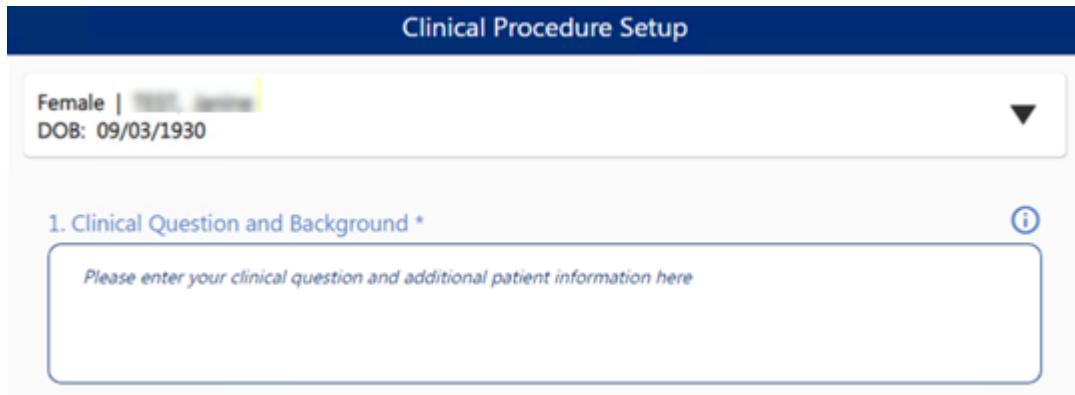
In the patient's chart, select Documents > E-Referrals. Click Add New  and select xWave Referral.



The xWave referral form is loaded and patient details are passed in from the patient's chart. Click the arrow on the top right to expand this pane to view the patient details.



Enter the Clinical details in the section provided. Any note entered into the patient's chart today will be displayed automatically in this section.



Search for the procedure e.g. US Pelvis or select the procedure from the list.

#### 2. Select Procedure

Quick Procedure Selection

Frequent Procedures

XR CHEST

US PELVIS

US ABDOMEN

+ Search by procedure

+ Search by indication

Search and select the applicable Indication and click **Next**.

US PELVIS

Suspected primary bone tumour, pelvis/hip X

Search For Indications

Indications referencing selected procedure: 8

Ovarian cancer: diagnosis X

Cancer of the uterine body: diagnosis X

Suspected pregnancy of unknown location (including ectopic pregnancy) X

Use the clinical decision support system to select the most appropriate scan for this patient.

Please Confirm Your Procedure From The List Below

Rank	Procedure	Recommendation
1	US PELVIS	Indicated only in specific circumstances <span style="border: 1px solid black; padding: 2px;">i</span>
1	XR HIP LT	Indicated <span style="border: 1px solid black; padding: 2px;">i</span>
1	XR HIP RT	Indicated <span style="border: 1px solid black; padding: 2px;">i</span>

Requested Procedure:

Additional Procedures Recommended by CDS:

Select Routine or Urgent, the preferred date and location.



XR HIP LT

Medica Arklow Primary Care Centre

58 km away

Routine

Urgent

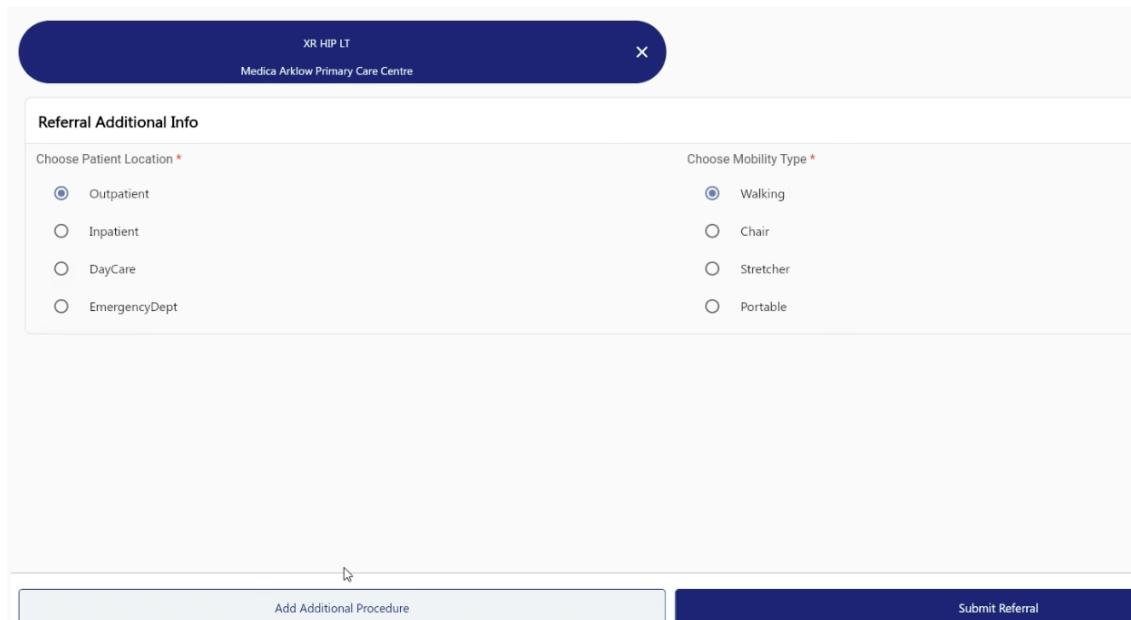
Select Preferred Dates

XR HIP LT

Medica Arklow Primary Care Centre

58 km away

You can add an additional procedure if required. When the referral is completed, click **Submit Referral**.



XR HIP LT

Medica Arklow Primary Care Centre

Referral Additional Info

Choose Patient Location \*

Outpatient

Inpatient

DayCare

EmergencyDept

Choose Mobility Type \*

Walking

Chair

Stretcher

Portable

Add Additional Procedure

Submit Referral

If any issues with the referral an error message will be displayed e.g. missing mobile number for the patient.

This Patient Has No Phone Number, You Can Add It Now.  
Phone \*

IE+353 ▾ 8787878787

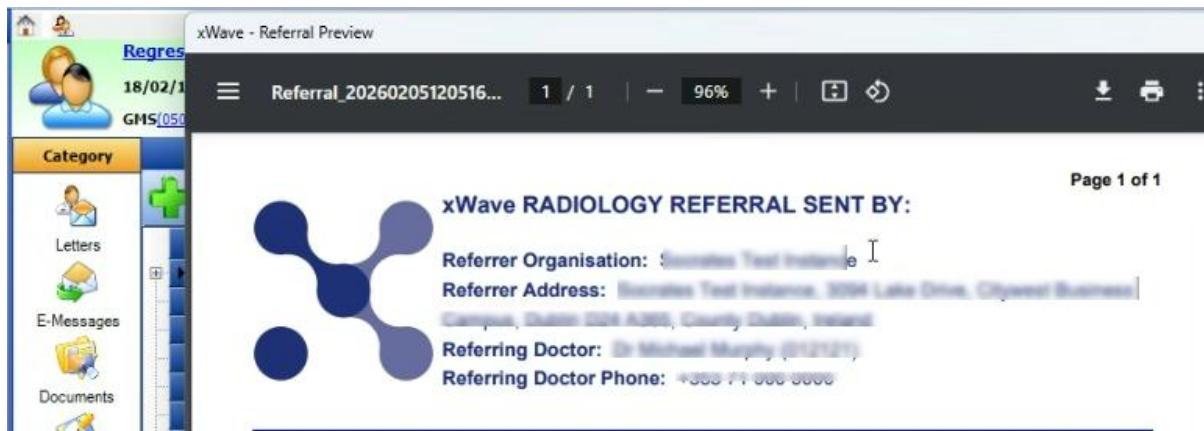
Add Phone Number And Submit Referral

Submit Referral Without Phone Number

Once the referral is submitted, it will be recorded in the Documents > E-Referrals section with the status.

E-Referrals					
Category	Sent	Response	Description	HCP	Status
Letters	05/02/2026	XR HIP LT.	Dr Michael Murphy	Delivered	
E-Messages	05/02/2026	Breast Clinic Referral - Beaumont Breast Clinic	Dr Michael Murphy	Delivered	

Once the response is downloaded from xWave the status will update to Response Received. Double click on the referral to open the PDF.



xWave - Referral Preview

Referrer Organisation: Socrates Test Instance

Referrer Address: Socrates Test Instance, 3004 Lake Drive, Clarendon Business Campus, Dublin D24 A286, County Dublin, Ireland

Referring Doctor: Dr Michael Murphy (01234567)

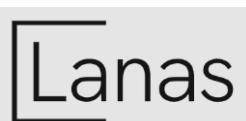
Referring Doctor Phone: +353 71 888 8888

Click Download Electronic Messages to download any xWave referral response.

## Result Viewer

Open My Control Panel > Result Viewer and select the Referral Responses section to view xWave referrals. Once a response is received the status will be updated in the pdf for each procedure – Accepted or Rejected.

If Socrates has not received a response within 7 days, the referral will be displayed in red font in the Awaiting queue.



xWave	Dr Michael Murphy
17/06/2025	
31/12/1950	

## 4.2. Letters

New appointment merge fields added to Patient Details.

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

## 4.3. 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

Prac 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 | Patient Immunisation

HCP / Vaccinator: Doctor2 Test

Hcp Number (MCN): 265853

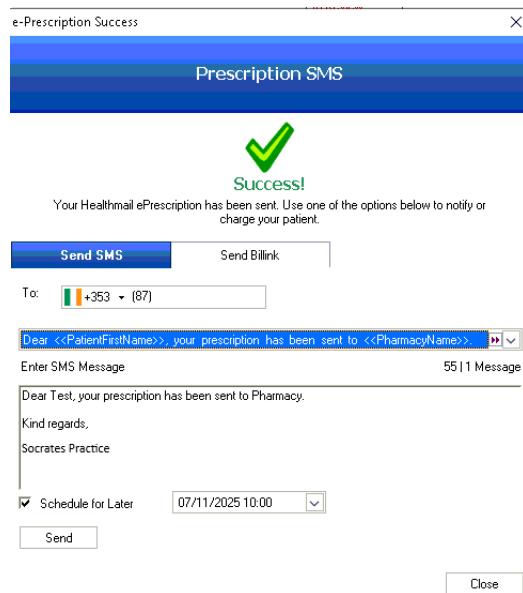
Date Given: 28/01/2026

**X** Administration details for this shot have already been recorded by another user. Please reload

**OK**

## 4.4. 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.

Result Viewer						Add Task	Complete
Date	Type	Source	Patient	DOB	HCP		
17/06/2025	Outpatient Clinic Letter	Socota TEST - LUH Oncology - Mr. George Philip	healthlink, eMessage	28/12/1991	Brain 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.

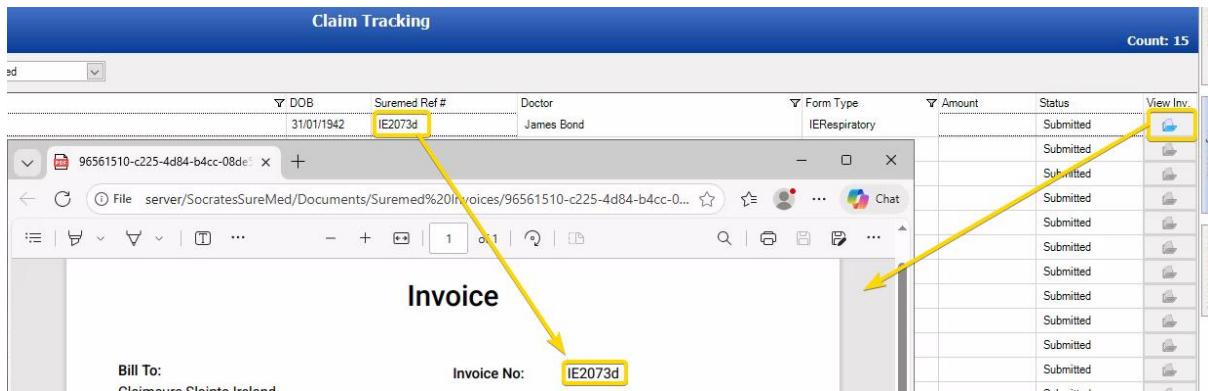
Claim Tracking								Count: 13		
Category	Forms	From	01/01/2000	To	31/01/2026	Status	Not Sent	Print		
	Date Form					Patient	DOB	PPSN	Gms #	Ref #

#### Suremed

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

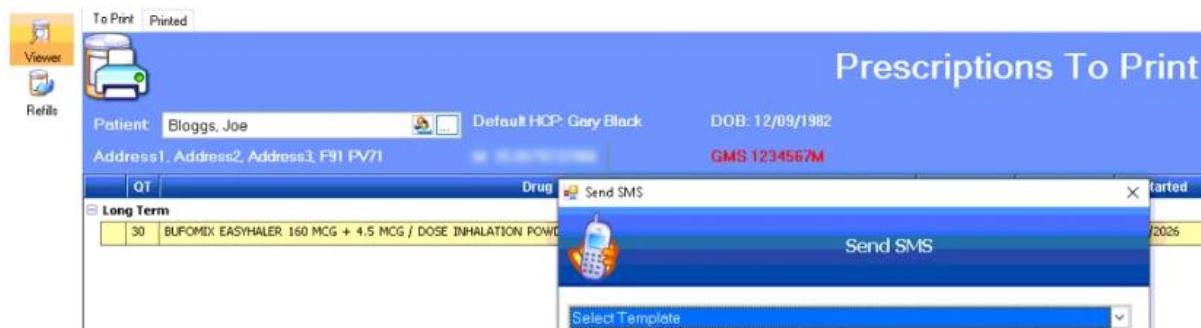


- Click the View Invoice button in the Claim Tracker to open the Invoice.



### 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.

Communication Log							
	Date	Name	Mobile No	Message	Status	Sent By	Actions
18/12/2025 08:59	Adams, Angel	080012345678	Dear Angel, your prescription has been sent.	Cancelled	Gary Black		
07/10/2025 08:49	Child, PC2016	080012345678	Dear PC2016, your General appointment is	Cancelled	Gary Black		
29/05/2025 09:52	Adams, Angel	080012345678	Dear Angel Adams, I hope you get this message.	Cancelled	Gary Black		
02/09/2022 09:58	Adams, Angel	080012345678	Dear Angel, your prescription has been sent.	Cancelled	Gary Black		
14/07/2021 11:37	Adams, Angel	080012345678	Dear Angel Adams, I hope you get this message.	Cancelled	Gary Black		
11/03/2006 15:16	test test	080012345678	test test	DeliveryError	Socrates Healthcare		
08/02/2006 20:19	Florence, Fred	080012345678	Please call around to the surgery for your test.	DeliveryError	Socrates Healthcare		
03/02/2006 14:30	Florence, Fred	080012345678	Your prescription is over due to be collected.	DeliveryError	Socrates Healthcare		
02/02/2006 13:35	Bundy, Ali	080012345678	Your test results have come back, ring the surgery.	DeliveryError	Socrates Healthcare		
20/12/2005 18:18	Florence, Fred	080012345678	Your test results have come back, ring the surgery.	DeliveryError	Socrates Healthcare		
20/12/2005 18:18	Florence, Fred	080012345678	Your test results have come back, ring the surgery.	DeliveryError	Socrates Healthcare		
15/12/2005 18:20	Florence, Fred	080012345678	XXXXXXX	DeliveryError	Socrates Healthcare		
14/12/2005 15:44		080012345678	Your prescription is over due to be collected.	DeliveryError	Socrates Healthcare		

[Cancel All](#)

## 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](#)

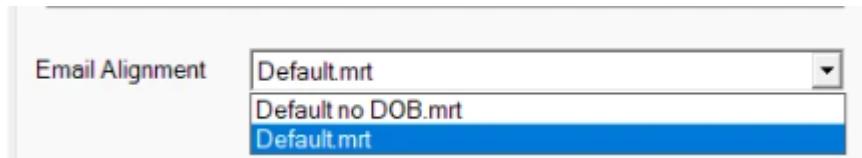


- **Prescriptions Printed between dates:** Report updated to include a 'User' dropdown and 'Include Instructions' checkbox.
- **Patient Attendance between dates:** Report updated for Pippo appointments.
- **Childhood Immunisations:** Checkbox added to exclude electronic claims.

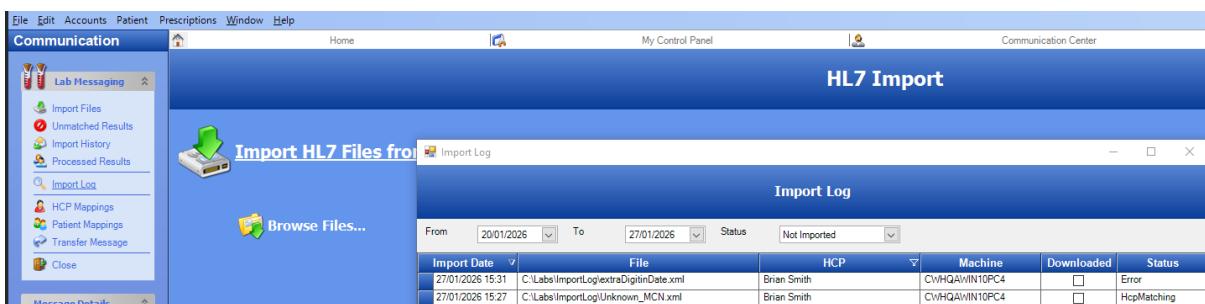
## 8. Tasks / Bugs

- **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 are 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.



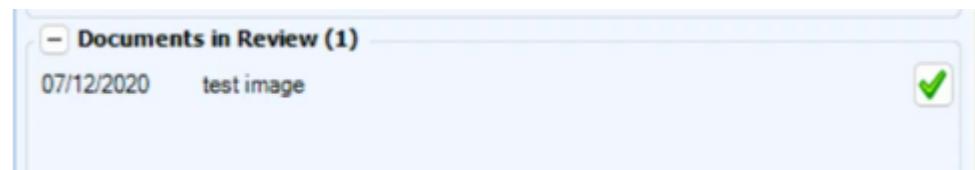
- Actions > Documents in Review

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.

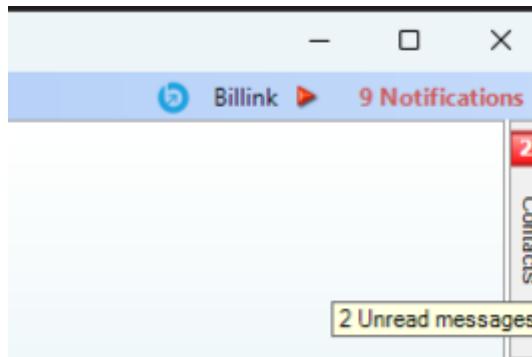
- When user is not the assigned user the check mark will not be displayed.



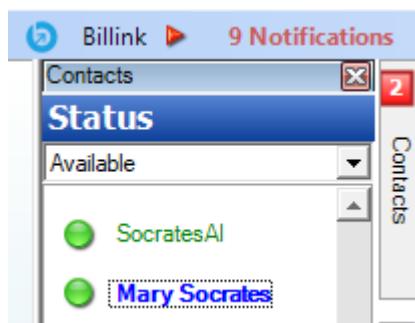
- When user is the assigned user the check mark will be displayed.



- 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.

