

socrates

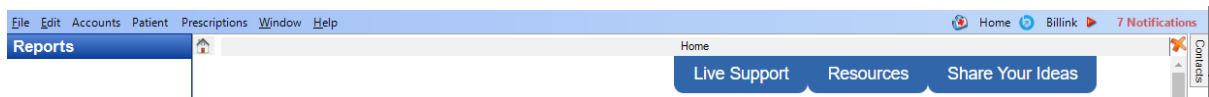
Socrates GP v3.5.0.2 Update User Manual May 2026

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Socrates Message

This manual documents the updates from release version 3.3.0.3 to 3.5.0.2 and includes AI Scribe together with some user requests e.g. ability to schedule an SMS 6 months in advance and deactivate Drug Instructions.

*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. Consultation

1.1. AI Scribe

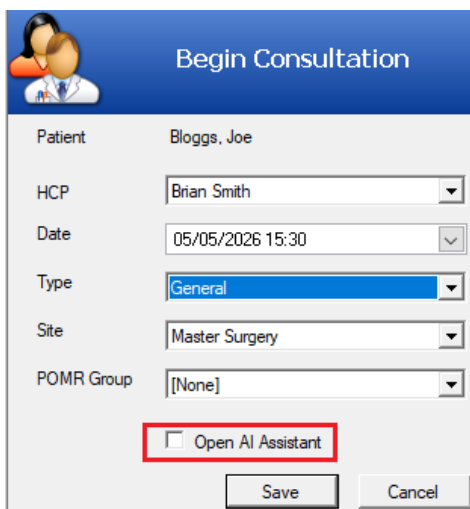
An **AI Assistant** menu item has been added to Consultation and is visible when the Consultation is in Edit mode. Click **Start** to launch AI Scribe.



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



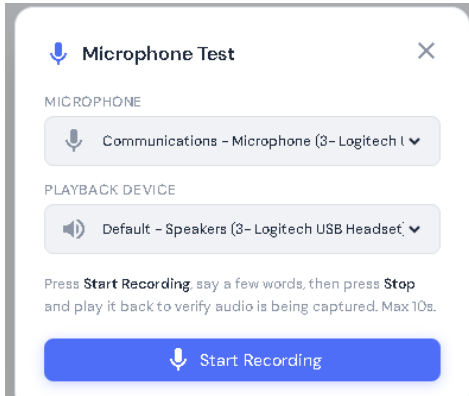
An 'Open AI Assistant' checkbox has been added to the **Begin Consultation** window. If checked it will launch the AI Assistant.



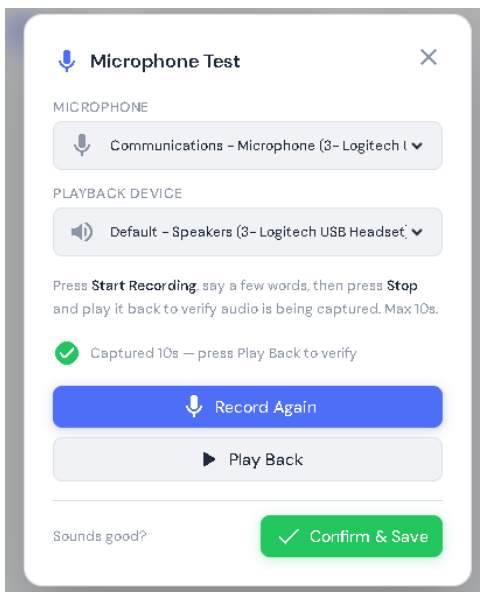
When logged in as a Doctor, '**Open AI Assistant**' will be checked by default. If the doctor user wants to disable this checkbox they can open Edit > Preferences > **Web & AI Features** and select the AI tab. Uncheck this preference and click **Save**.



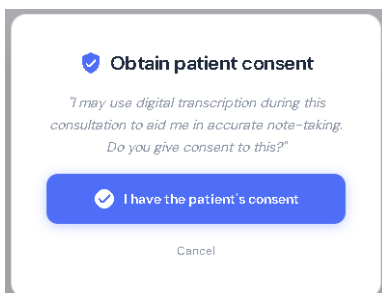
The first time AI Scribe is used or if a new microphone is added, you will be asked to test the microphone. Select the microphone from the dropdown list and click **Listen**, then click **Start Recording**.



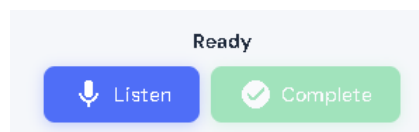
Once the microphone is working correctly click '**Confirm & Save**'.



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

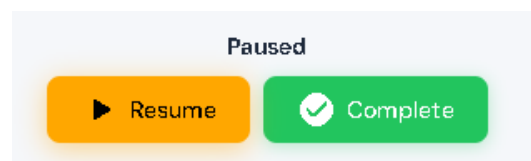
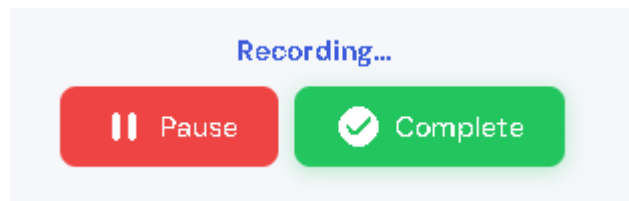


Consent can be updated at any time from Patient Registration > Extra Patient Details – Consent tab.

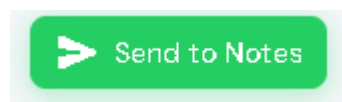


To start using AI Scribe click **Listen**.

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.

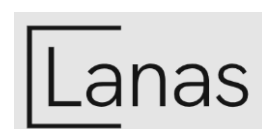
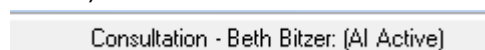


All notes generated using AI Scribe will have an AI flag in Consultation Notes. You can modify the note as required, then click **Save**.

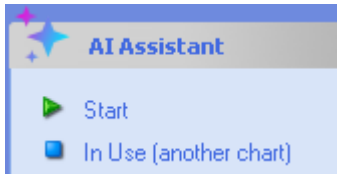
	Date	Type
	05/05/2026	Note

Note:

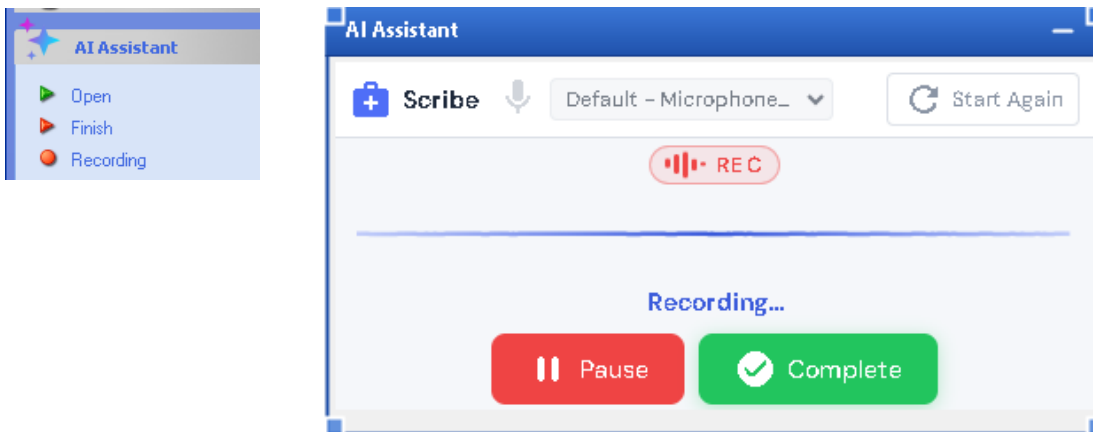
AI Scribe can only be launched in one patient’s chart at a time. The tab header will show (AI Active) for the consultation which has AI Scribe launched.



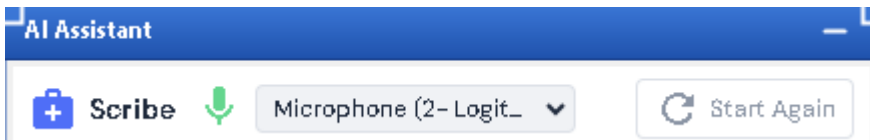
If another patient’s chart is opened, AI Scribe will show that it is in use in another chart.



When AI Scribe is listening, it will show ‘Recording’ in the menu item and Recording on the AI Scribe (minimized) window.



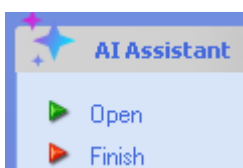
- Click  to minimize the AI Assistant and Open to launch it again.



- Click Open to maximise the AI Assistant.



- Click **Finish** to close the AI Assistant **without** saving any recording to the patient’s chart.

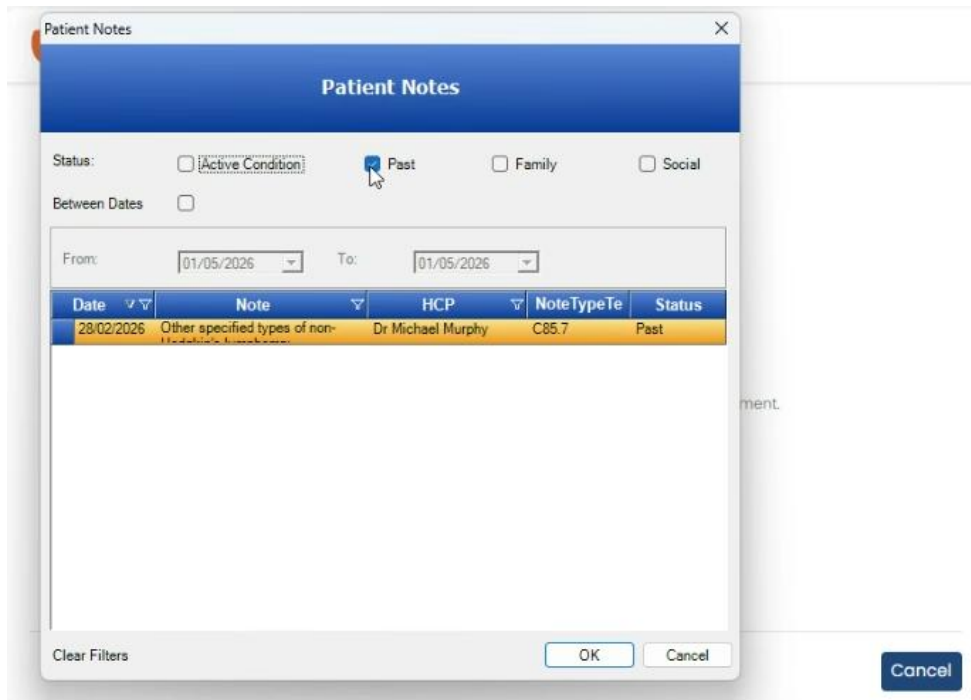


1.2. Alliance Referrals

When adding an alliance referral (Documents > E-Referrals), click the **Add Information** button to add notes from the patient’s chart.



Past History is checked by default, but you can uncheck it and add any relevant notes to the referral.



2. Accounts

Socrates will now process Billink full or partial refunds completed on the Billink portal. They will be shown in Socrates when the sync button is clicked in Billink Search History or when downloading electronic messages (Communication > Lab Messaging).



A negative charge and a negative payment will be added for the refund amount.

Date	Description	Taken By	Debit	Credit	Balance
30/04/2026	Consultation Charge	Brian Smith	€145.00		€190.00
30/04/2026	Consultation Charge	Brian Smith	€12.00		€202.00
30/04/2026	Consultation Charge	Brian Smith	€5.00		€207.00
30/04/2026	Consultation Charge	Brian Smith	-€5.00		€202.00
30/04/2026	Online Payment	Brian Smith		-€5.00	€207.00
30/04/2026	Consultation Charge	Brian Smith	-€2.00		€205.00
30/04/2026	Online Payment	Brian Smith		-€2.00	€207.00
30/04/2026	Online Payment	Brian Smith		€145.00	€62.00
30/04/2026	Online Payment	Brian Smith		€12.00	€50.00
30/04/2026	Online Payment	Brian Smith		€5.00	€45.00

The status of the original Billink sms request will be 'Refund' in Billink > Search History when there has been a partial or full refund completed.

3. Appointments

Find Free Slot has been updated to show date From and To filters and between times to allow for easier searching.

Find Free Slot

Bloggs, Joe

From:

To:

Between time: to

HCP:

Appointment Slots

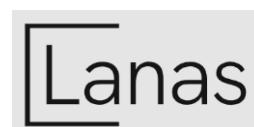
Date	Time	Detail
29/04/2026	09:45	AVAILABLE
	10:00	Joe Bloggs
	10:15	Joe Bloggs
	10:30	AVAILABLE

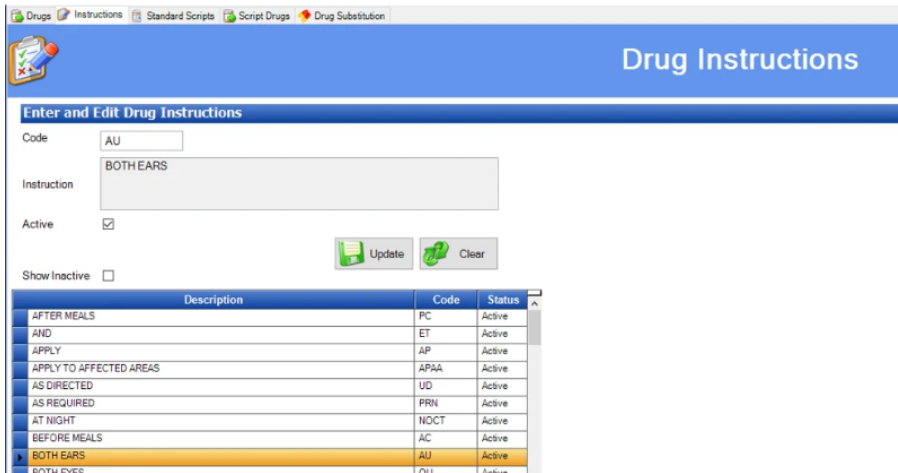
4. My Control Panel

4.1. Admin Console

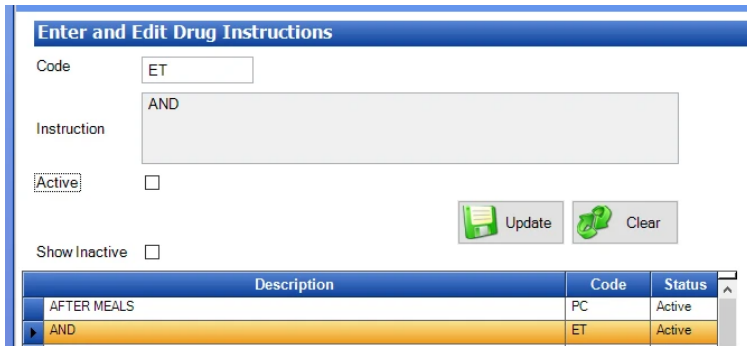
4.1.1. Drugs

You can deactivate drug instructions from My Control Panel > Admin Console > Drugs > Instructions tab.





Select the instruction and uncheck Active and click **Update**.



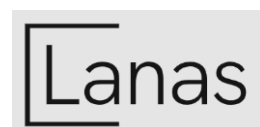
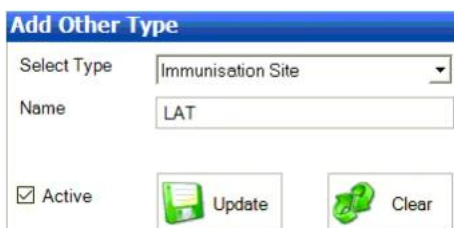
Click **Show Inactive** to view all inactive drug instructions.



For existing prescriptions and standard scripts, the inactive instruction will be displayed.

4.1.1. System Types

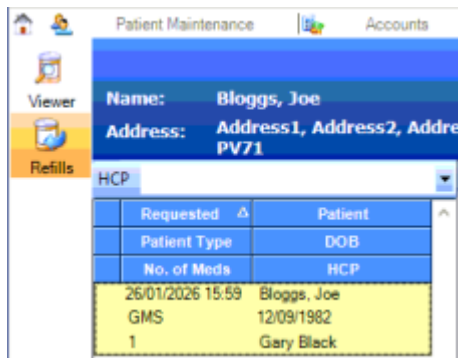
You can now deactivate Immunisation sites (that are not system locked) from My Control Panel > Admin Console > System Types.



Only active sites will be displayed in the Immunisation Site dropdown list in the patient’s chart. The inactive site will be displayed for previous immunisations where this site was used.

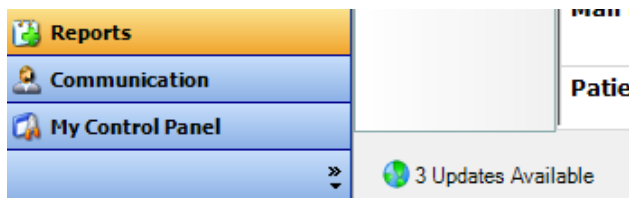
4.2. Prescription Viewer

The time of refill request has been added to the Date Requested field in Refill Requests (My Control Panel > Prescription Viewer > Refills).

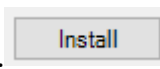


5. Reports

It is important that you regularly check for Report updates in Socrates. If there are updates available, click the link to open the list.



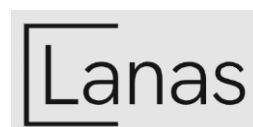
Click this button twice to select all and click Install.



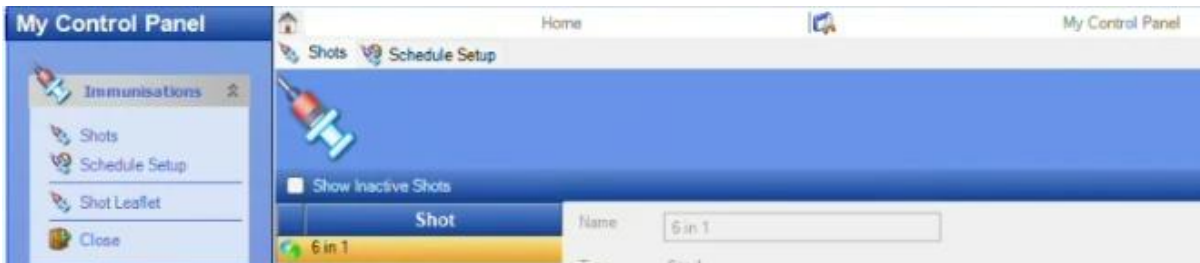
- CDM Finder reports updated to improve performance.

6. Tasks / Bugs

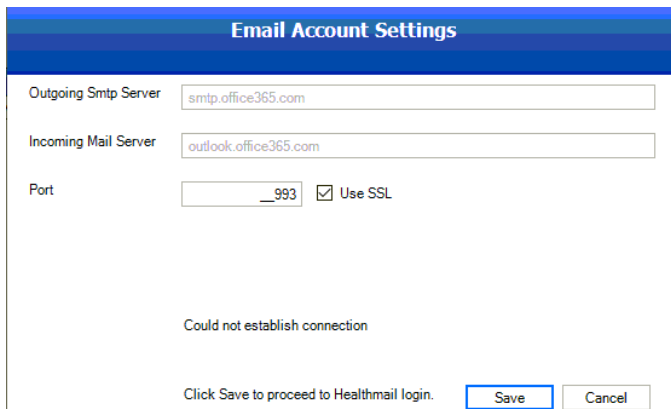
- SMS: You can now schedule an SMS up to 6 months in advance.
- New Pippo Refill Declined reason added – ‘This prescription request has been previously completed. No further action is necessary.’
- ICD-10 Database: Updated spelling of H81.0 - Meniere's disease.



- Immunisations Batch Repository: A sync has been added when Control Panel > Admin Console > Immunisations is opened to ensure that you are not missing any batches for electronic shots.



- Healthmail Login: The email account settings form is now read-only, and additional text has been added to inform you to click Save on this screen to proceed to Healthmail login.



- Result Viewer: A filter has been added to Date, Source, Patient and Date of Birth in the Coop / Discharges section to enable easier searching.



- Suremed Insurance Requests: Comment column in Claim Tracking now shows 'Withdrawn by Insurer' if the Insurance company withdraws a request.

Claim Tracking							Count: 37
DOB	Suremed Ref #	Doctor	Form Type	Amount	Status	Comments	
24/09/1934	IE2292b	James Bond	IEStroke	70.00	Declined	Withdrawn by Insurer	

