

socrates

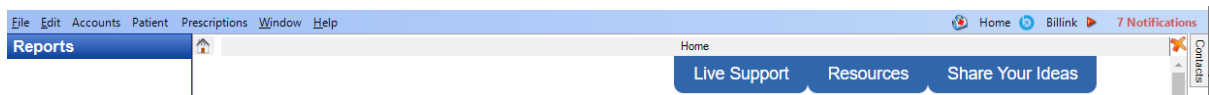
Socrates GP v3.5.4 Update User Manual Sept 2026

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Socrates Message

This manual documents the updates from release version 3.5.3 to 3.5.4 and includes updates to Flu, Pneumococcal & Covid Vaccines.

*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 > Immunisations

Flu e-Vaccine

Indications for Vaccination

New question added to the flu consent form for patients aged between 16 and 69: "Is the client a Healthcare worker?". If the answer is Yes, the Healthcare worker Indication will be selected by default. Otherwise, you must select an indication.

Indications updated to below list.

The screenshot shows a form with the following fields and options:

- Is the client a Healthcare worker?** (Radio buttons for Yes and No)
- Indications for Vaccination** (Dropdown menu with a warning icon)
 - ☒ Healthcare Worker
 - ☐ Eligible due to medical risk factor (excluding immunocompromised)
 - ☐ Patient Pregnant
 - ☐ Eligible due to living in a long-term care facility
 - ☐ Eligible due to other reason e.g. carer, Pig/Poultry worker etc
 - ☐ Patient Immunosuppressed
- Responsible Hcp** (Text field)
- Pcrs Contract Number** (Text field)
- Patient County** (Text field)

Pneumococcal e-Vaccine

Indications for Vaccination

Indications updated to below list.

The screenshot shows a form with the following fields and options:

- Indications for Vaccination** (Dropdown menu with a warning icon)
 - ☒ Age for current campaign
 - ☐ Client at High Risk (Group A)
 - ☐ Client at Medium Risk (Group B)
- Responsible Hcp** (Text field)
- See Contract Number** (Text field)

Covid e-Vaccine

Patient Immunocompromised

New custom field added for 'Patient Immunocompromised'.

The screenshot shows a form with the following fields and options:

- Alerts** (Icon)
- Patient Family** (Section Header)
- Custom Fields** (Icon)
- Consent** (Icon)
- Contacts** (Icon)
- Occupations** (Icon)
- Other HCPs** (Icon)
- Mothers Maiden Name** (Text field)
- Former Family Name** (Text field)
- Alias** (Text field)
- CSPID** (Text field)
- IC Assessment** (Text field)
- Drug Payment Scheme** (Text field)
- Drug Payment Expiry** (Text field)
- Country** (Text field)
- Patient Immunocompromised** (Text field)

A new field 'Patient Immunocompromised' has been added to the Covid Consent form to replace the previous dropdown list.

The screenshot shows a form for a Covid-19 Booster. Fields include: Shot (Covid-19 Booster), Date Due (04/09/2026), Date Given (04/09/2026 with a 'Today' dropdown), Age on given date (45y 8m), Patient Is Eligible (checked), Patient Consent (dropdown with a warning icon), and Patient Immunocompromised? (radio buttons for Yes and No).

This field will auto-populate from the previous IC Assessment custom field if it was populated for the patient.

▪ Indications for Vaccination

If Patient Immunocompromised is Yes, an Indication will not be mandatory, if No an Indication for Vaccination must be selected from the dropdown list.

The screenshot shows the 'Indications for Vaccination' dropdown menu. The dropdown is open, showing four options: 'Eligible on grounds of age for current campaign', 'Eligible due to living in a long-term care facility', 'Eligible due to medical risk factor (excluding immunocompromised)', and 'Eligible due to other reason'. Below the dropdown are labels for 'Responsible Hcp' and 'Pcrs Contract Number'.

Allocation group has been removed.

2. Tasks

- **AI Assistant:** A warning message will be displayed if you click Finish while a recording is in progress. Click No, to continue with the AI recording.

