



# Socrates – GP e-Referrals Mini Guide

This user guide summarises how the GP e-Referral process works when referring to Specialist Screening Healthcare Ireland (SSHI) via the Socrates GP application.

For Socrates support queries please call 071 – 919 3600 or email support@clanwilliamhealth.com

## Step #1

Open the 'Documents' section of the patient's chart and click 'E-Referrals'.

The screenshot shows the Socrates (2.4.3.3) interface for a patient named Michael Test. The 'Documents' section is highlighted in the left-hand navigation menu. Within this section, the 'E-Referrals' icon is highlighted with a red box. The main area displays a table of e-referrals:

Sent	Response	Description	
18/07/2017		General Referral - Foetal Ultrasound	Dr Joe Blogs
17/07/2017		General Referral - DXA	Dr Joe Blogs
13/07/2017	13/07/2017	General Referral - Ultrasound	Dr Joe Blogs
12/07/2017		General Referral - MRI	Dr Joe Blogs
11/07/2017		General Referral - CT	Dr Joe Blogs
11/07/2017		General Referral - MRI	Dr Joe Blogs
08/07/2017	14/07/2017	General Referral - Ultrasound	Dr Joe Blogs
03/04/2017		General Referral - CUH X-Ray	Dr Joe Blogs



**Beacon Clinic**  
Suite A33 1st Floor  
The Mall Beacon Court  
Sandyford Dublin 18  
D18 DR77

**Blackrock Clinic**  
Suite 34 4th Floor  
Rock Road  
Blackrock Co Dublin  
A94 E4X7



## Step #2

Click 'Add Referral' and then click the 'Healthlink Referral' button.

The screenshot shows the Socrates (2.4.3.3) interface. The patient details for Michael Test are visible at the top. The 'Add Referral' button is highlighted with a red box, and its dropdown menu is open, showing 'Healthlink Referral' as the selected option. Below this, a table of referrals is displayed.

Date	Response	Description	Referral
			Dr Joe Blogs
			Dr Joe Blogs
13/07/2017			Dr Joe Blogs
19/07/2017			Dr Joe Blogs
19/07/2017			Dr Joe Blogs
17/07/2017			Dr Joe Blogs
13/07/2017	13/07/2017		Dr Joe Blogs
12/07/2017			Dr Joe Blogs
11/07/2017			Dr Joe Blogs
11/07/2017			Dr Joe Blogs
08/07/2017	14/07/2017		Dr Joe Blogs
03/04/2017			Dr Joe Blogs

## Step #3

Select Hospital Type 'Private'.

The screenshot shows the 'Patient Search' form in the Socrates software. The 'Hospital Type' is set to 'Private', which is highlighted with a red box. The form includes fields for Surname, First Name, DOB, Sex, Hospital No., and Address, along with 'Search' and 'Clear' buttons.

Referral

- ▶ Patient Search
- ▶ Patient Details
- ▶ Referral Details
- ▶ Summary
- Close

Michael Test  
DOB: 29/03/1969 Sex: Male Address: Main Street, Swords, Dublin,

Hospital Type  Public  Private

Select Hospital

Select Referral

Surname  Hospital No:

First Name  Address:

DOB  Sex

Search Clear

Surname	First Name	DOB	Sex	Address
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## Step #4

Click the 'Select Hospital' list and select Specialist Screening Healthcare Ireland.

Socrates (2.4.3.3) - Dr Joe Blogs Logged On - Demo Practice

File Edit Accounts Window Help

Consultation - Michael Test

**Consultation**

Referral

- Patient Search
- Patient Details
- Referral Details
- Summary
- Close

**Patient Search**

Michael Test  
DOB: 29/03/1969 Sex: Male Address: Main Street, Swords, Dublin,

Hospital Type  Public  Private

Select Hospital **Specialist Screening Healthcare Ireland**

Select Referral

Surname Hospital No:

First Name Address:

DOB Sex:

Search Clear

Surname	First Name	DOB	Sex
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## Step #5

Click the 'Select Referral' list to choose what type of specialist health check referral service you wish to send the patient for, e.g. LungCheck, PectusCheck or HeartRhythmCheck.

Socrates (2.4.3.3) - Dr Joe Blogs Logged On - Demo Practice

File Edit Accounts Window Help

Consultation - Michael Test

**Consultation**

Referral

- Patient Search
- Patient Details
- Referral Details
- Summary
- Close

**Patient Search**

Michael Test  
DOB: 29/03/1969 Sex: Male Address: Main Street, Swords, Dublin,

Hospital Type:  Public  Private

Select Hospital: Specialist Screening Healthcare Ireland

Select Referral: HeartRhythmCheck Private Referral

Surname:  Hospital No:

First Name:  Address:

DOB:  Sex:

Search Clear

Surname	First Name	DOB	Sex
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Step #6 (Scenario A) – the patient has not been referred electronically to SSHI before

If the patient has not been referred electronically to SSHI before click the 'Create New Patient' button in the bottom right corner, followed by 'Next' on the following screen.

The screenshot shows a patient search form with the following fields: Surname (Test), Hospital No. (dropdown), First Name (Michael), Address (text), DOB (dropdown), and Sex (dropdown). Below the form is a table with columns: Surname, First Name, DOB, Sex, Address, MRN, and Hospital. The table is currently empty. A sidebar on the left contains navigation links: Appointments, Waiting Room, Patient Maintenance, Consultation (highlighted), Reports, Communication, and My Control Panel. At the bottom of the table area, it says "No Patient's Found" and a red-bordered button labeled "Create New Patient (if not found) >>".

Step #6 (Scenario B) – the patient has been referred electronically to SSHI before

If the patient has been referred electronically to SSHI before then the patient's name will already be saved on the Healthlink platform and will therefore automatically appear in the bottom half of the screen. Double click anywhere on the name.

The screenshot shows the same patient search form as in Scenario A. The table below the form now contains one entry, highlighted in yellow and outlined in red:

Surname	First Name	DOB	Sex
Test	Michael	29/03/1969	M



## Step #7

The 'National Standard Referral Form' will load up. Fill in the patient referral information as normal.

**Note:** demographic and clinical information, such as past medical history, medications, etc, that have already been saved in the patient's chart will automatically populate the appropriate sections of the letter, meaning additional work/typing will be kept to a minimum.

When all referral information has been filled in click 'Next' in the bottom right corner.

The screenshot shows the 'NATIONAL STANDARD REFERRAL FORM' for a 'HeartRhythmCheck Private Referral'. The form is populated with the following information:

- Patient Name:** Michael Test
- Date of Birth:** 29/03/1969
- Gender:** Male
- Hospital:** Specialist Screening Healthcare Ireland
- Clinic:** HeartRhythmCheck Private Referral
- Referral Priority:** Routine
- Preferred Consultant:** Doe (Surname), Mr. John (First Name)
- Reason for Referral / Anticipated Outcome:** Referral reason goes here.
- General History:** Previous Hospital Attendance, History of Presenting Complaints, History of Past Illness (Past history will automatically populate here.), History of Surgical Procedures, Allergies / Adverse Medication Events (Past allergies will automatically populate here.).

The screenshot shows the bottom section of the 'NATIONAL STANDARD REFERRAL FORM' for a 'HeartRhythmCheck Private Referral'. The form is populated with the following information:

- Allergies / Adverse Medication Events:** Past allergies will automatically populate here.
- Relevant Family History:** Family history will automatically populate here.
- Vital Signs:** Pulse (bpm), BP Systolic/Diastolic (mm/hg), Body Height (1.80 metres), Weight (78.00 Kg), Body Mass Index (24.07 Kg/M2).
- Lab Investigation:** Add...
- Rad Investigation:** Add...
- Clinical Examination:**
- Social History:** Drinker (Yes), Units of Alcohol (5) per week, Smoker (Current smoker), Number of Cigarettes (10) per day, Years Smoking (8), Next of Kin (name, no. relationship).
- Current Medication:** Patient on Anticoagulants (No), Other Medication: 16/08/2017 28 x PERINDOPRIL ARGININE 10MG FILM-COATED TABLETS, 30/03/2017 28 x COSMIPREL 5 MG + 5 MG TABLETS (BISOPROLOL FUMARATE/PERINDOPRIL ARGININE), 30/03/2017 30 x BISOPROLOL MEDISOURCE 2.5 MG / 5 ML ORAL (BISOPROLOL FUMARATE).
- Additional Relevant Information:** Social history will automatically populate here.
- Next >>>** button highlighted in red.





## Step #8

An A4 preview of the letter will appear on screen which you can review to make sure you are happy with the referral before sending it. If you wish to edit it, you can do so by clicking the 'Back' button in the bottom right corner. When you are ready to send it click the 'Submit' button in the bottom right corner.

**National General Referral Form**

**Patient Summary:** Michael Test (29/03/1969 - M, Main Street, Swords)

**Referring GP:** Blogs, Dr Joe

**Referral Priority:** Urgent

**General History**

**Reason for Referral** Referral reason goes here.

**History of presenting complaints** This is a sample referral.

**History of Past illness** Past history will automatically populate here.

**Allergies/Adverse Medication Events** Past allergies will automatically populate here.

**Relevant Family History** Family history will automatically populate here.

**Social History**

**Physical mobility impairment** No

**Smoker** Current smoker

**Number of Cigarettes per day** 10

**Years Smoking** 8

**Drinker** Yes

**Units of Alcohol per week** 5

**Body Height** 1.80 metres

**Weight** 78.00 Kg

**Body Mass Index** 24.07 Kg/M2

**Current Medication**

**Anticoagulant Use** No

**Current Medication** 28 x PERINDOPRIL ARGININE 10MG FILM-COATED TABLETS

**Current Medication** 28 x COSIMPREL 5 MG + 5 MG TABLETS (BISOPROLOL FUMARATE/PERINDOPRIL ARGININE)

<<< Back Submit

The referral will take approximately 3 seconds to deliver and will appear in SSHI's booking office in real time where it will be triaged as normal. In the patient's chart the status of the referral will change to 'Delivered'.

Consultation - Michael Test

Test, Michael  
Main Street, Swords, Dublin  
0875465454  
9000014

29/03/1969 (48 yr 3 m) Male Private P.E.O.00 P.E.O.00

Date	Response	Description	HCP	Status
19/07/2017		General Referral - CT	Dr Joe Blogs	Delivered
19/07/2017		General Referral - CT	Dr Joe Blogs	Delivered
19/07/2017		General Referral - CT	Dr Joe Blogs	Delivered
19/07/2017		General Referral - CT	Dr Joe Blogs	Delivered
19/07/2017		General Referral - Foetal Ultrasound	Dr Joe Blogs	Delivered
17/07/2017		General Referral - DXA	Dr Joe Blogs	Delivered
13/07/2017	13/07/2017	General Referral - Ultrasound	Dr Joe Blogs	Response Received
12/07/2017		General Referral - MRI	Dr Joe Blogs	Delivered
12/07/2017		General Referral - CT	Dr Joe Blogs	Delivered
11/07/2017		General Referral - MRI	Dr Joe Blogs	Delivered
08/07/2017	14/07/2017	General Referral - Ultrasound	Dr Joe Blogs	Response Received
03/04/2017		General Referral - CLM X-Ray	Dr Joe Blogs	Delivered



## Viewing Response Messages from SSHI

### Option 1 – View response in the patient’s chart

If a referral response message is sent by SSHI to the practice (via the Healthlink Online Portal) the status of the referral in the patient’s chart will change to ‘Response Received’.

On the left-hand side of the screen you will see a ‘Sent’ date and a ‘Response’ date. The sent date is the date the referral letter was sent, and the response date is the date the response was received.

The screenshot shows a software interface for a patient's chart. The patient's name is 'Test, Michael' and the chart is titled 'E-Referrals'. A table lists various referrals with columns for 'Sent', 'Response', 'Description', 'HCP', and 'Status'. The row for 'General Referral - Ultrasound' dated 13/07/2017 is highlighted in orange, indicating a 'Response Received' status.

Sent	Response	Description	HCP	Status
19/07/2017		General Referral - CT	Dr Joe Blogs	Delivered
19/07/2017		General Referral - CT	Dr Joe Blogs	Delivered
19/07/2017		General Referral - CT	Dr Joe Blogs	Delivered
19/07/2017		General Referral - CT	Dr Joe Blogs	Delivered
18/07/2017		General Referral - Foetal Ultrasound	Dr Joe Blogs	Delivered
18/07/2017		General Referral - DVA	Dr Joe Blogs	Delivered
13/07/2017	13/07/2017	General Referral - Ultrasound	Dr Joe Blogs	Response Received
12/07/2017		General Referral - MRI	Dr Joe Blogs	Delivered
11/07/2017		General Referral - CT	Dr Joe Blogs	Delivered
11/07/2017		General Referral - MRI	Dr Joe Blogs	Delivered
08/07/2017	14/07/2017	General Referral - Ultrasound	Dr Joe Blogs	Response Received
03/04/2017		General Referral - CUH X-Ray	Dr Joe Blogs	Delivered

To view the response message for a particular referral double click anywhere on the referral line (highlighted in orange). The original referral letter will load up first. In the top left corner click the ‘Next’ button to move from page 1 (the referral letter) to page 2 (the response message).





Preview  
Print Previous **Next** Page 1 of 2

**NATIONAL GENERAL REFERRAL FORM**

**Patient Summary:** Michael Test (29/03/1969 - 48 yrs - M), Main Street, Swords  
**Referring Clinician:** Blogs, Dr Joe

**Referral Priority:** Urgent

**General History:**  
**Reason for Referral:** This is a demo referral.  
**Previous Hospital Attendance:** No  
**History of presenting complaints:** This is a demo referral.  
**History of Past illness:** This is a demo referral.  
**History of surgical procedures:** This is a demo referral.  
**Allergies/Adverse medication Events:** This is a demo referral.  
**Relevant family history:** This is a demo referral.

**Clinical Exam:** This is a demo referral.  
**Body Height:** 1.80 metres  
**Weight:** 78.00 Kg  
**Body Mass Index:** 24.07 Kg/M2

**Social History:** **Physical mobility impairment:** No  
**Smoker:** Current smoker

Preview  
Print Previous **Next** Page 2 of 2

**NATIONAL GENERAL REFERRAL RESPONSE FORM**

**Patient Summary:** Michael Test (29/03/1969 - 48 yrs - M), Main Street, Swords

**Referral Overview:**  
**Referral Received:** Your referral has been received  
**OPD Arranged:** Yes  
**Other Comments:**

**OPD Details:**  
**OPD Clinic:**  
**Appointment Date:**  
**Reminder Comment:** Please ensure the patient brings their medication details, along with relevant x-rays, scans and radiology reports, with them to their appointment.

**Suggested Action for GP:**

**Suggested Action by Consultant:**

Patient Demographics		General Practitioner Details:	
<b>Patient Name:</b>	Michael Test	<b>Hospital:</b>	Specialist Screening Healthcare Ireland
<b>Date of Birth:</b>	29/03/1969 (Age: 48 years)	<b>Clinic:</b>	HeartRhythmCheck Private Referral
<b>Gender:</b>	Male	<b>Respondent:</b>	
<b>Address:</b>	Main Street Swords Dublin	<b>GP:</b>	Blogs Dr Joe
<b>Mobile:</b>	0875465454	<b>Medical Council Number:</b>	012121
<b>HIS Patient ID:</b>	HL0001	<b>Address:</b>	Demo Practice Lake Drive Citywest Dublin 1234567
		<b>Phone:</b>	1234567
		<b>Referral Response Sent:</b>	13/07/2017 22:30
		<b>Message ID:</b>	RR120170713112143012121

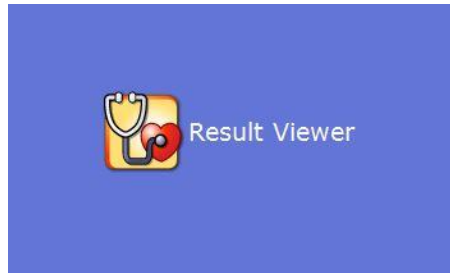


## Option 2 – View response in the Result Viewer module

### Step #1

Click 'My Control Panel' in the bottom left corner of the screen, and then 'Result Viewer'.

### Option 2 – View response in the Result Viewer module



### Step #1

Click 'My Control Panel' in the bottom left corner of the screen, and then 'Result Viewer'.

### Step #2

The Result Viewer module displays all incoming electronic messages into the practice such as lab reports, COOP messages, referral response messages, etc. To view response messages, click the 'Referral Responses' tab in the top right corner. This will allow you to view and read response messages for all patients in one convenient location.

**Processed Referral Response Messages**

Name: \_\_\_\_\_ DOB: \_\_\_\_\_  
Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Investigations **15** | COOP/Discharges | Antenatal | Appointment Messages | **Referral Responses 1**

Print | Mark as Read | Assign Task

Referral Type	Received	HCP	Patient
DOB			Address
General	05/03/2018	Dr Joe Bloggs	Jane Test
General	03/08/1941	Dr Joe Bloggs	Strand View
General	14/07/2017	Dr Joe Bloggs	Michael Test
General	29/03/1969	Dr Joe Bloggs	Main Street
General	14/07/2017	Dr Joe Bloggs	Joe Test
General	23/07/1968	Dr Joe Bloggs	Sample Street
General	14/07/2017	Dr Joe Bloggs	Colin Test
General	16/05/1945	Dr Joe Bloggs	Sea View
General	14/07/2017	Dr Joe Bloggs	Jane Test
General	03/08/1941	Dr Joe Bloggs	Strand View
General	14/07/2017	Dr Joe Bloggs	Joe Test
General	23/07/1968	Dr Joe Bloggs	Sample Street
General	13/07/2017	Dr Joe Bloggs	Michael Test
General	29/03/1969	Dr Joe Bloggs	Main Street
General	13/07/2017	Dr Joe Bloggs	Phillip Test
General	23/04/1937	Dr Joe Bloggs	8152 Seagull Court

Select a Response Message to preview



Step #3

Click a response from the list on the left-hand side to view it. If you wish, you can mark it as *read* by clicking the 'Mark as Read' button in the top left corner or assign a task to action it later. Once marked as read it will be removed from this list but will always be viewable in the patient's chart as per Option 1 further above.

**Processed Referral Response Messages**

<b>Name:</b> Test, Michael	<b>DOB:</b> 29/03/1969 (48 yr 11 m)
<b>Address:</b> Main Street, Swords, Dublin	<b>Phone:</b> M: 0875465454

<b>Investigations:</b> <span style="background-color: #0056b3; color: white; padding: 2px;">10</span>	<b>COOP/Discharges:</b>	<b>Antenatal:</b>	<b>Appointment Messages:</b>
<b>Referral Responses:</b> <span style="background-color: #0056b3; color: white; padding: 2px;">1</span>			

Print
Mark as Read
Assign Task

Referral Type	Received	HCP	Patient	Address
General	06/03/2018	Dr Joe Bloggs	Jane Test	Strand View
General	14/07/2017	Dr Joe Bloggs	Michael Test	Main Street
General	14/07/2017	Dr Joe Bloggs	Joe Test	Sample Street
General	14/07/2017	Dr Joe Bloggs	Colin Test	Sea View
General	14/07/2017	Dr Joe Bloggs	Jane Test	Strand View
General	14/07/2017	Dr Joe Bloggs	Joe Test	Sample Street
General	13/07/2017	Dr Joe Bloggs	Michael Test	Main Street
General	13/07/2017	Dr Joe Bloggs	Phillip Test	8192 Seagull Court

NATIONAL GENERAL REFERRAL RESPONSE FORM

**Patient Summary:** Michael Test (29/03/1969 - 48 yrs - M), Main Street, Swords

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**Referral Overview:**

**Referral Received:** Your referral has been received

**OPD Arranged:** Yes

**Other Comments:**

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**OPD Details:**

**OPD Clinic:**

**Appointment Date:**

**Reminder Comment:** Please ensure the patient brings their medication details, along with relevant x-rays, scans and radiology reports, with them to their appointment.

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**Suggested Action for GP:**

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**Suggested Action by Consultant:**

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Patient Demographics	General Practitioner Details:
<b>Patient Name:</b> Michael Test	<b>Hospital:</b> Specialist Screening Healthcare Ireland
<b>Date of Birth:</b> 29/03/1969 (Age: 48 years)	<b>Clinic:</b> HeartRhythmCheck Private Referral
<b>Gender:</b> Male	<b>Respondent:</b>
<b>Address:</b> Main Street Swords Dublin	<b>GP:</b> Bloggs Dr Joe
<b>Mobile:</b> 0875465454	<b>Medical Council Number:</b> 012121
	<b>Address:</b> Demo Practice Lake Drive