



St Patrick's Mental Health Services

Socrates GP eReferrals Mini Guide

This user guide summarises how the GP eReferral process works when referring to St Patrick's Mental Health Services (SPMHS) via the Socrates GP application.

For Socrates support queries please call 071 – 919 3600 followed by option 1, or email support@clanwilliamgroup.com

Step #1

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

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

File Edit Accounts Consultation Custom Forms Window Help

Consultation

Consultation Details Notes Immunisations Prescriptions Investigations Documents Email Patient Add Letter Edit Letter Print Letter Open in Wordpad Email Letter Scan Document Sketch Drawing Care Protocols

Test, Michael
Main Street, Swords, Dublin 0875465454
29/03/1969 (48 yr 3 m) Male Private P:£0.00 F:£0.00

Editing: 18/07/2017 23:43 by Dr Joe Blogs 0000014

Consultation - Michael Test

E-Referrals

Add Referral Print Preview Delete

| 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 |

Letters Documents Sketches **E-Referrals** Forms Mail Merge



Step #2

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

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

File Edit Accounts Consultation Custom Forms Window Help

Consultation - Michael Test

Test, Michael
Main Street, Swords, Dublin 0875465454 0000014
29/03/1969 (48 yr 5 m) Male Private P:£0.00 F:£0.00

Editing: 18/07/2017 23:43 by Dr Joe Blogs

E-Referrals

Letters Documents Sketches E-Referrals Forms Mail Merge

Add Referral

Healthlink Referral

| Date | Description | Referral |
|------------|--------------------------------------|--------------|
| 19/07/2017 | General Referral - CT | Dr Joe Blogs |
| 18/07/2017 | General Referral - CT | Dr Joe Blogs |
| 17/07/2017 | General Referral - CT | Dr Joe Blogs |
| 16/07/2017 | General Referral - CT | Dr Joe Blogs |
| 15/07/2017 | General Referral - CT | Dr Joe Blogs |
| 14/07/2017 | General Referral - Foetal Ultrasound | Dr Joe Blogs |
| 13/07/2017 | General Referral - DXA | Dr Joe Blogs |
| 12/07/2017 | General Referral - Ultrasound | Dr Joe Blogs |
| 11/07/2017 | General Referral - MRI | Dr Joe Blogs |
| 10/07/2017 | General Referral - CT | Dr Joe Blogs |
| 09/07/2017 | General Referral - MRI | Dr Joe Blogs |
| 08/07/2017 | General Referral - Ultrasound | Dr Joe Blogs |
| 07/07/2017 | General Referral - Ultrasound | Dr Joe Blogs |
| 06/07/2017 | General Referral - CUH X-Ray | Dr Joe Blogs |

Step #3

Select Hospital Type 'Private'.

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

File Edit Accounts Window Help

Consultation - Michael Test

Patient Search

DOB: 29/03/1969 Sex: Male Michael Test
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 |
|---------|------------|-----|-----|---------|
|---------|------------|-----|-----|---------|



Step #4

Click the 'Select Hospital' list and select St Patrick's Mental Health Services.

Socrates (2.4.7.0) - Dr Joe Blogs Logged On - Demo Practice

File Edit Accounts Window Help

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 St. Patrick's Mental Health Services

Select Referral

Surname Test Hospital No:

First Name Michael Address:

DOB Sex

Search Clear

| Surname | First Name | DOB | Sex |
|---------|------------|-----|-----|
|---------|------------|-----|-----|



Step #5

Click the 'Select Referral' list and then select 'Psychiatric Referral Service'.

Socrates (2.4.7.0) - Dr Joe Blogs Logged On - Demo Practice

File Edit Accounts Window Help

Consultation Consultation - Michael Test

Referral

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

Patient Search

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

Hospital Type ☐ Public ☒ Private

Select Hospital

Select Referral

Surname Hospital No:

First Name Address:

DOB Sex

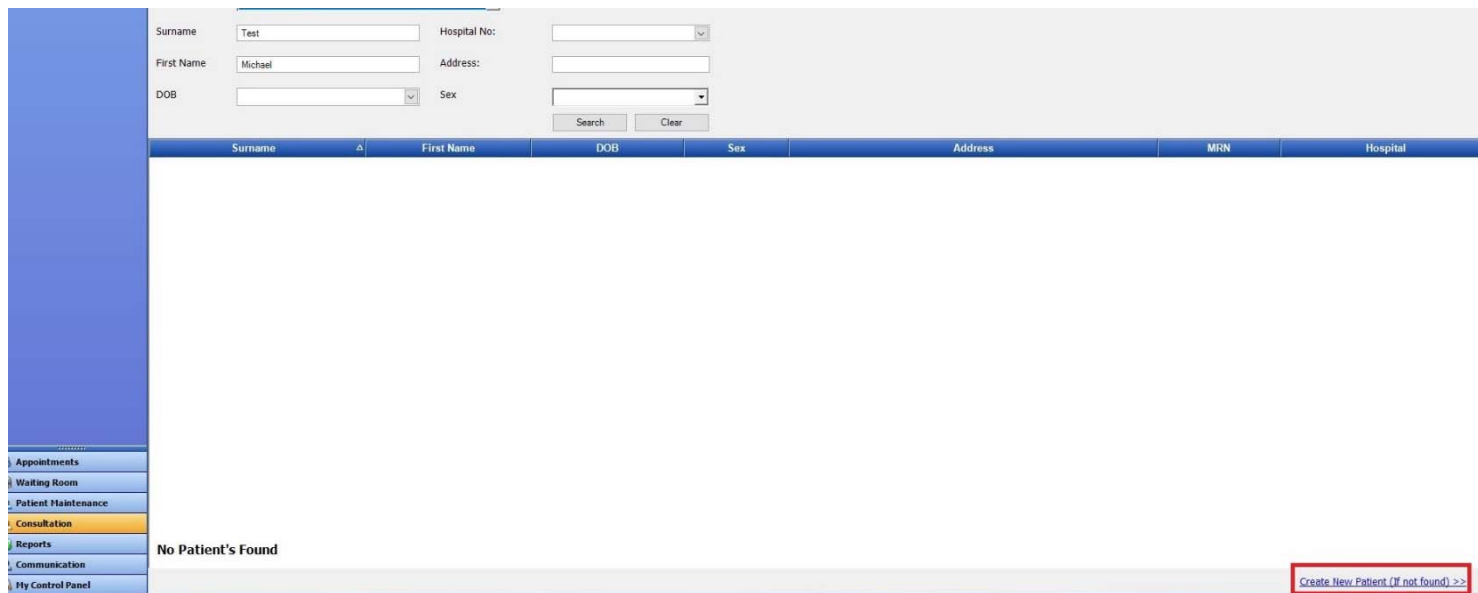
Search Clear

| Surname | First Name | DOB | Sex |
|---------|------------|-----|-----|
|---------|------------|-----|-----|



Step #6 (Scenario A) – the patient has not been referred electronically to SPMHS before

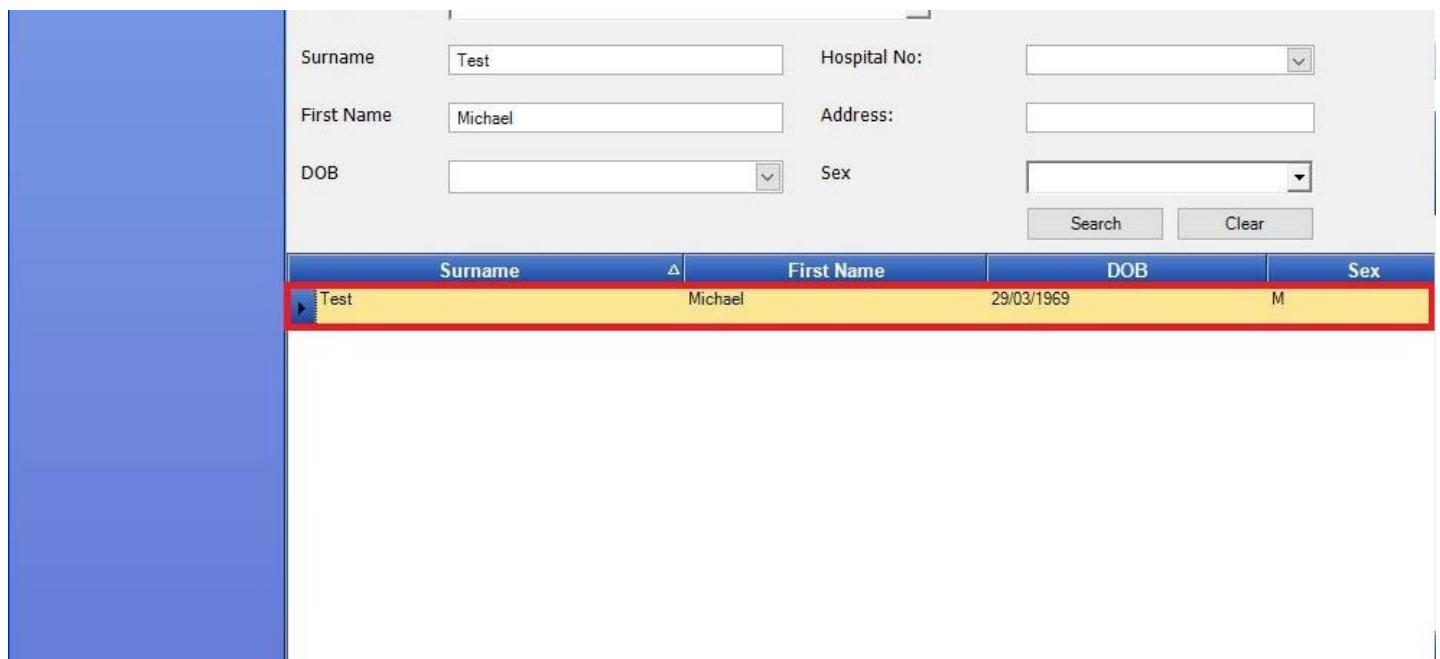
If the patient has not been referred electronically to SPMHS before click the 'Create New Patient' button in the bottom right corner, followed by 'Next' on the following screen.



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 empty, and the text 'No Patient's Found' is displayed. On the left is a sidebar with navigation links: Appointments, Waiting Room, Patient Maintenance, Consultation (highlighted), Reports, Communication, and My Control Panel. In the bottom right corner, there is a red-bordered button that says 'Create New Patient (If not found) >>'.

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

If the patient has been referred electronically to SPMHS 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 patient's name to proceed.



The screenshot shows the same patient search form as in Scenario A, but with a patient record displayed in the table. The record is highlighted with a red border and contains the following information: Surname: Test, First Name: Michael, DOB: 29/03/1969, Sex: M. The table has columns: Surname, First Name, DOB, Sex, Address, MRN, and Hospital. The sidebar and navigation links are the same as in Scenario A.

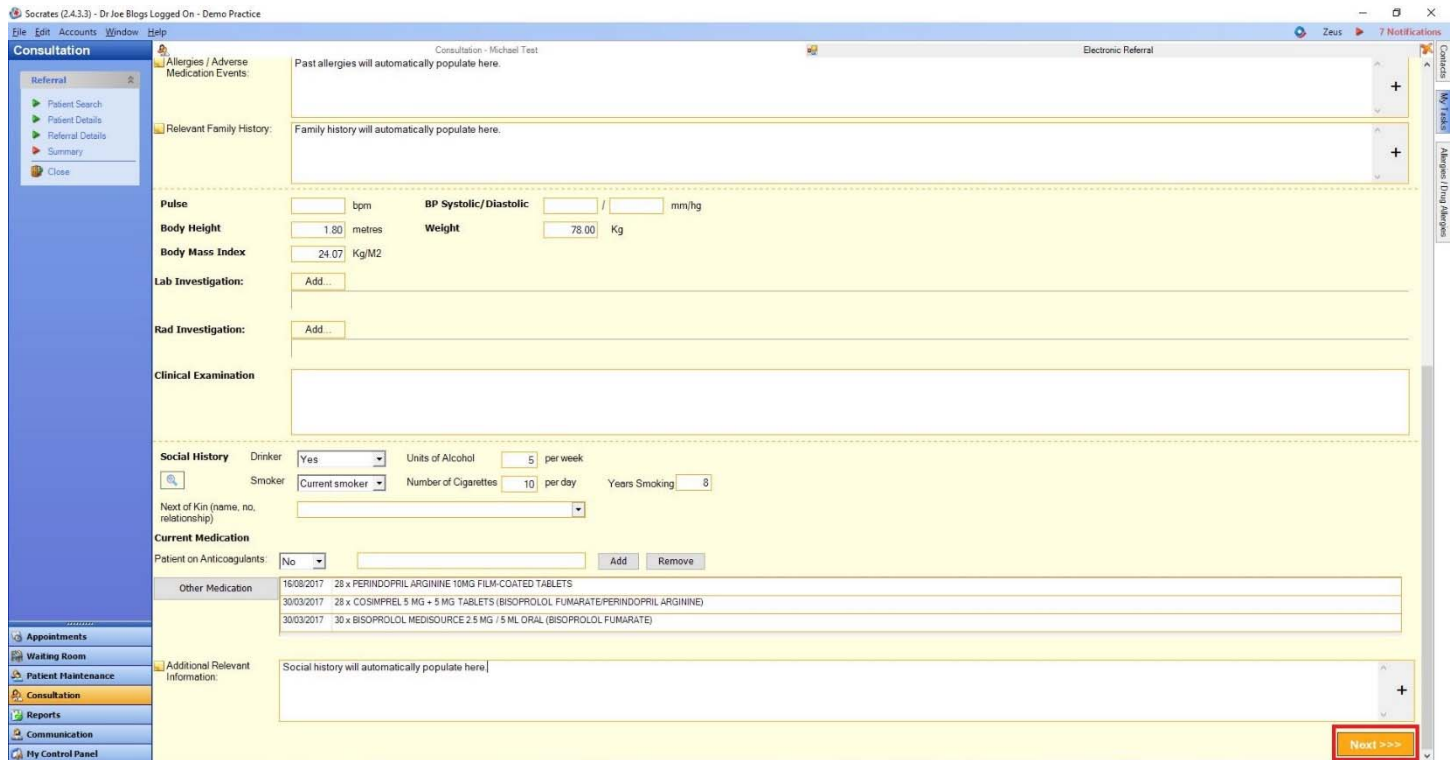


Step #7

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 is kept to a minimum.

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



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

File Edit Accounts Window Help

Consultation - Michael Test

Electronic Referral

Zeus 7 Notifications

Consultation

Referral

- Patient Search
- Referral Details
- Summary
- Close

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

Relevant Family History: Family history will automatically populate here.

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:

Rad Investigation:

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 COSMPREL 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.



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 the SPMHS 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'.

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

Consultation - Michael Test

Test, Michael
Ham Street, Swords, Dublin
29/03/1969 (48 yr 3 m) Male Private P:€0.00 F:€0.00

Editing: 18/07/2017 23:43 by Dr Joe Blogs 0000014

E-Referrals

| 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 - 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 Receiv |
| 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 Receiv |
| 03/04/2017 | | General Referral - CUH X-Ray | Dr Joe Blogs | Delivered |

Viewing Response Messages from St Patrick's Mental Health Services

Option 1 – View response in the patient's chart

If a referral response message is sent by SPMHS 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 the Socrates (2.4.3.3) software interface. The patient's chart for Michael Test is displayed. The 'E-Referrals' table is visible, showing a list of referrals and their status. The following table represents the data shown in the screenshot:

| 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 |
| 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 |
| 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: | |
|------------------------|---------------------------------|--------------------------------|--|
| Patient Name: | Michael Test | Hospital: | St. Patrick's Mental Health Services |
| Date of Birth: | 29/03/1969 (Age: 48 years) | Clinic: | Psychiatric Referral Service |
| Gender: | Male | Respondent: | |
| Address: | Main Street Swords Dublin | GP: | Blogs Dr Joe |
| Mobile: | 0875465454 | Medical Council Number: | 012121 |
| HIS Patient ID: | HL0001 | Address: | Demo Practice Lake Drive Citywest Dublin 1234567 |
| | | Phone: | 1234567 |
| | | Referral Response Sent: | 13/07/2017 22:30 |
| | | Message ID: | 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'.



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 **13** COOP/Discharges Antenatal Appointment Messages **ReferralResponses 1**

Print Mark as Read Assign Task

| Referral Type | Received | HCP | Patient |
|---------------|------------|--------------|--------------------|
| DOB | Address | | |
| General | 05/03/2018 | Dr Joe Blogs | Jane Test |
| | 03/08/1941 | | Strand View |
| General | 14/07/2017 | Dr Joe Blogs | Michael Test |
| | 29/03/1969 | | Main Street |
| General | 14/07/2017 | Dr Joe Blogs | Joe Test |
| | 23/07/1968 | | Sample Street |
| General | 14/07/2017 | Dr Joe Blogs | Colin Test |
| | 16/05/1945 | | Sea View |
| General | 14/07/2017 | Dr Joe Blogs | Jane Test |
| | 03/08/1941 | | Strand View |
| General | 14/07/2017 | Dr Joe Blogs | Joe Test |
| | 23/07/1968 | | Sample Street |
| General | 13/07/2017 | Dr Joe Blogs | Michael Test |
| | 29/03/1969 | | Main Street |
| General | 13/07/2017 | Dr Joe Blogs | Philip Test |
| | 23/04/1937 | | 8192 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 on. 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

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

Investigations 103 COOP/Discharges Antenatal Appointment Messages Referral Responses 1

Print Mark as Read Assign Task

| Referral Type | HCP |
|---------------|--------------------|
| Received | Patient |
| DOB | Address |
| General | Dr Joe Blogs |
| 05/03/2018 | Jane Test |
| 03/08/1941 | Strand View |
| General | Dr Joe Blogs |
| 14/07/2017 | Michael Test |
| 29/03/1969 | Main Street |
| General | Dr Joe Blogs |
| 14/07/2017 | Joe Test |
| 23/07/1968 | Sample Street |
| General | Dr Joe Blogs |
| 14/07/2017 | Colin Test |
| 16/05/1945 | Sea View |
| General | Dr Joe Blogs |
| 14/07/2017 | Jane Test |
| 03/08/1941 | Strand View |
| General | Dr Joe Blogs |
| 14/07/2017 | Joe Test |
| 23/07/1968 | Sample Street |
| General | Dr Joe Blogs |
| 13/07/2017 | Michael Test |
| 29/03/1969 | Main Street |
| General | Dr Joe Blogs |
| 13/07/2017 | Phillip Test |
| 23/04/1937 | 8192 Seagull Court |

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

Patient Name: Michael Test
Date of Birth: 29/03/1969 (Age: 48 years)
Gender: Male
Address: Main Street
Swords
Dublin
Mobile: 0875465454

General Practitioner Details:

Hospital: St. Patrick's Mental Health Services
Clinic: Psychiatric Referral Service
Respondent:
GP: Blogs Dr Joe
Medical Council Number: 012121
Address: Demo Practice
Lake Drive