

Alliance Medical eReferrals

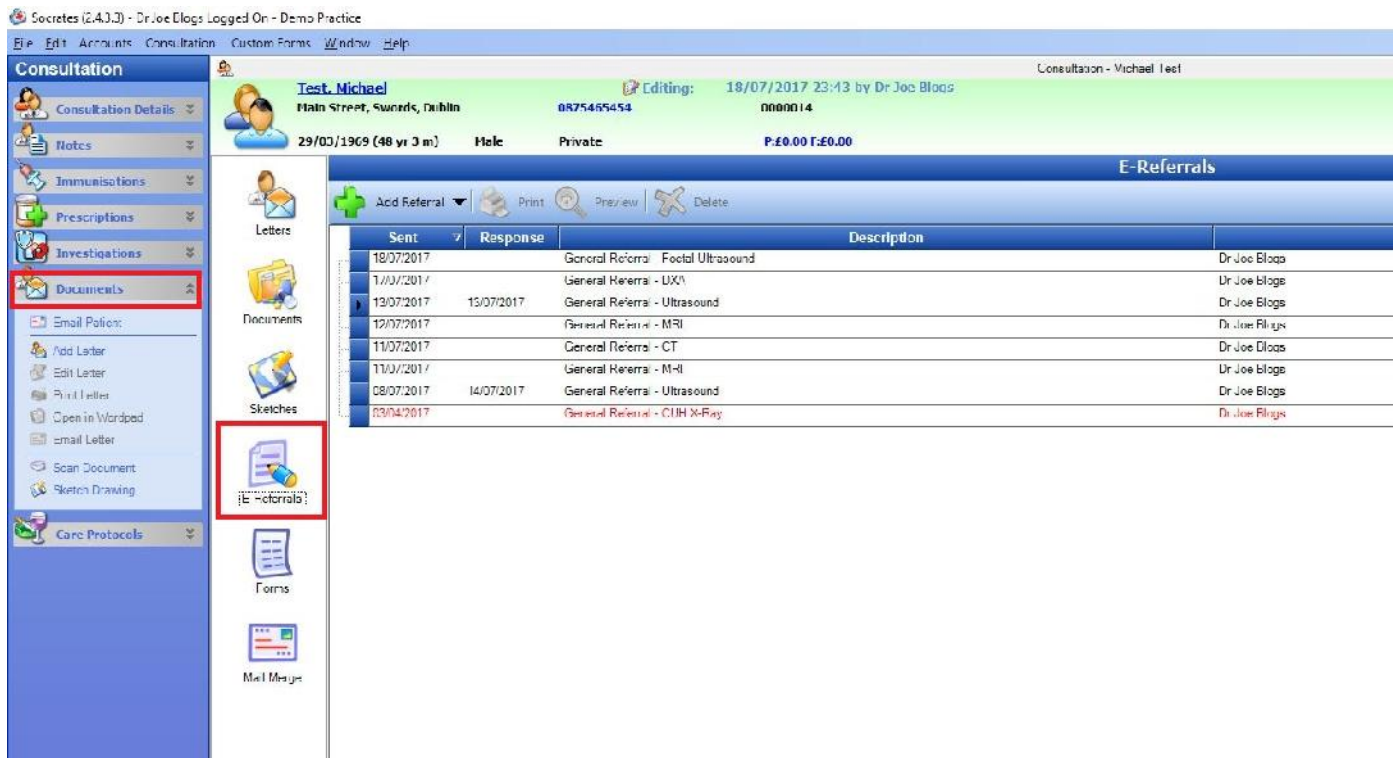
Socrates Mini Guide

This user guide summarises how the GP referral process works with the Alliance Medical eReferral button in the Socrates 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'.



The screenshot shows the Socrates application interface for a patient named Michael Test. The 'Documents' section is highlighted in the left sidebar, and the 'E-Referrals' table is visible in the main content area. The table lists several referrals with their dates, responses, descriptions, and the referring doctor (Dr. Joe Blogs).

Sent	Response	Description	Referring Doctor
18/07/2017		General Referral - Focetal Ultrasound	Dr. Joe Blogs
17/07/2017		General Referral - DXA	Dr. Joe Blogs
12/07/2017	15/07/2017	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 - CIJH X-Ray	Dr. Joe Blogs

Step #2

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

The screenshot shows the Socrates (2.4.3.3) software interface. The top menu bar includes 'File', 'Edit', 'Accounts', 'Consultation', 'Custom Forms', 'Window', and 'Help'. The main window displays a consultation for 'Test, Michael' with details: 'Main Street, Swords, Dublin', '0875465454', '0000014', '29/03/1969 (48 yr 3 m)', 'Male', 'Private', and 'P:£0.00 F:£0.00'. The 'E-Referrals' section is active, showing a table of referrals. The 'Add Referral' button is highlighted with a red box, and the 'Alliance Referral' option in the dropdown menu is also highlighted with a red box.

Response	Description	Referral Date	Referral To
Healthlink Referral	General Referral - Foetal Ultrasound		Dr Joe Blogs
Affidea Referral	General Referral - DXA		Dr Joe Blogs
Alliance Referral	General Referral - Ultrasound	12/07/2017	Dr Joe Blogs
	General Referral - MRI	11/07/2017	Dr Joe Blogs
	General Referral - CT	11/07/2017	Dr Joe Blogs
	General Referral - MRI	08/07/2017	Dr Joe Blogs
	General Referral - Ultrasound	14/07/2017	Dr Joe Blogs
	General Referral - CUH X-Ray	03/04/2017	Dr Joe Blogs

Step #3

The private eReferrals section will open up with all Alliance Medical radiology centres loaded into the 'Select Hospital' list. Click the hospital list and select the Alliance Medical centre you wish to refer to.

The screenshot shows the Socrates (2.4.3.3) software interface. The top menu bar includes 'File', 'Edit', 'Accounts', 'Window', and 'Help'. The main window displays a 'Patient Search' form for 'Michael Test' with details: 'DOB: 29/03/1969', 'Sex: Male', and 'Address: Main Street, Swords, Dublin'. The 'Hospital Type' is set to 'Private'. The 'Select Hospital' dropdown menu is highlighted with a red box. The form includes fields for 'Surname', 'First Name', 'DOB', 'Hospital No.', 'Address', and 'Sex', along with 'Search' and 'Clear' buttons.

Surname	First Name	DOB	Sex
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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

Select Referral

Surname

First Name

DOB

20:20 Imaging MRI
Alliance Mater Private Cork Radiology
Alliance Medical Charter Medical Radiology
Alliance Medical Clane Hospital Radiology
Alliance Medical Merlin Park CT and MRI
Alliance Medical MRI Bons Secours Hospital Tralee
Alliance Medical MRI Centre Ballinasloe
Alliance Medical MRI Centre Clonmel
Alliance Medical MRI Centre Drogheda
Alliance Medical MRI Centre Tullamore
Alliance Medical MRI Consultant Private Clinic CJH

Search Clear

Surname	First Name	DOB	Sex
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Step #4

After selecting your chosen Alliance Medical centre click the 'Select Referral' list to choose what type of radiology referral you wish to send to that centre. Note: only radiology types available through Alliance Medical in your chosen centre will be available for selection.

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 Alliance Medical Merlin Park CT and MRI

Select Referral CT Referral

Surname CT Referral
MRI Referral

First Name Michael Address:

DOB Sex

Search Clear

Surname	First Name	DOB	Sex
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Step #5 – Scenario A (the patient has not been referred electronically to this centre before)

If the patient has not been referred electronically to this particular Alliance Medical centre before click the 'Create New Patient' button in the bottom right corner.

The screenshot shows the Socrates (2.4.3.3) Patient Search interface. The search criteria are: Surname: Test, First Name: Michael, DOB: 29/03/1969, Sex: Male, Address: Main Street, Swords, Dublin. The search results table is empty, displaying "No Patient's Found". A button labeled "Create New Patient (if not found) >>" is highlighted in the bottom right corner.

Surname	First Name	DOB	Sex	Address	MRN	Hospital
No Patient's Found						

Step #5 – Scenario B (the patient has been referred electronically to this centre before)

If the patient has been referred electronically to this particular Alliance Medical centre already then the patient's name will appear in the bottom half of the screen. Double click anywhere on the name.

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 Alliance Medical Merlin Park CT and MRI

Select Referral

Surname Test Hospital No:

First Name Michael Address:

DOB Sex

Search Clear

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

Step #6

Click the 'Next' button.

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

File Edit Accounts Window Help

Consultation - Michael Test

Referral

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

Patient Details

Surname:	* Test	GP Emergency Phone:	* 1234567
First Name:	* Michael	Pregnancy Status:	
Title:		First Language:	* English
Date of Birth:	* 29/03/1969	Interpreter Required:	* No
Sex:	* Male	Wheelchair Assistance:	* No
Address 1 :	* Main Street	Public/Private Patient:	
Address 2 :	* Swords		
Address 3 :	Dublin		
Address 4 :			
Phone :			
Mobile :	* 0875465454		
Email:			

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Step #7

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.

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

File Edit Accounts Window Help

Consultation - Michael Test

Electronic Referral

NATIONAL STANDARD REFERRAL FORM

CT Referral

Patient Name	Michael Test	Hospital	Alliance Medical Merlin Park CT and MRI
Date of Birth	29/03/1969	Clinic	CT
Gender	Male		

Referral Priority * Urgent

Preferred Consultant Surname
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.

Relevant Family History: Family history will automatically populate here.

Pulse bpm BP Systolic/Diastolic / mm/hg

Step #8

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

Consultation - Michael Test

Electronic Referral

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

Relevant Family History: Family history will automatically populate here.

Physical Exam:
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 5 per week
Smoker: Current smoker 10 per day Years Smoking 8
Next of Kin (name, no., relationship):

Current Medication:
Patient on Anticoagulants: No

Other Medication:
15/08/2017 28 x PERINDOPRIL ARGININE 10MG FILM-COATED TABLETS
30/03/2017 28 x CO-SMPREL 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 >>>

soctas (4.4.2) - Dr Joe Blogs Logged On - Demo Practice

File Edit Accounts Consultation Custom Forms Window Help

Consultation

Test, Michael
Main Street, Swords, Dublin
0875465454 0000014
29/03/1969 (48 yr 3 m) Male Private P46.00 F40.00

Consultation - Michael Test

E Referrals

Add Referral Print Preview Delete

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
19/07/2017		General Referral - Fetal Ultrasound	Dr Joe Blogs	Delivered
19/07/2017		General Referral - OGA	Dr Joe Blogs	Delivered
19/07/2017	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
09/07/2017	14/07/2017	General Referral - Ultrasound	Dr Joe Blogs	Response Received
05/04/2017		General Referral - CLB-36-Fly	Dr Joe Blogs	Delivered

To view the response message itself for this patient double click anywhere on the highlighted referral and then click onto page 2 by using the green arrow in the top left corner.

Preview

Print Previous Next Page 2 of 2

 **NATIONAL GENERAL REFERRAL RESPONSE FORM**
Informedness in better care. Built for better practice.

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: We will set up a scan no problem !Kind Regards:Eimear

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:	Alliance Medical Charter Medical Radiology
Date of Birth:	29/03/1969 (Age: 48 years)	Clinic:	Ultrasound
Gender:	Male	Respondent:	Eimear O'Donnell
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
		Phone:	1234567
		Referral Response Sent:	13/07/2017 22:30
		Message ID:	RR120170713112143012121

To view response messages for all patients go to My Control Panel -> Result Viewer -> Referral Response Messages. Here you will see response messages for all patients in one screen.

Processed Referral Response Messages

Name: Test, Michael DOB: 29/03/1969 (48 yr 3 m)
 Address: Main Street, Swords, Dublin Phone: M: 0875465454

Investigations: 10 Mark as Read Assign Task

Referral Type	HCP	Patient
Received		Address
DOB		
General	Dr Joe Blops	Jane Test
General	Dr Joe Blops	Strand View
General	Dr Joe Blops	Colin Test
General	Dr Joe Blops	Sea View
General	Dr Joe Blops	Jane Test
General	Dr Joe Blops	Sample Street
General	Dr Joe Blops	Jane Test
General	Dr Joe Blops	Strand View
General	Dr Joe Blops	Joe Test
General	Dr Joe Blops	Sample Street
General	Dr Joe Blops	Joe Test
General	Dr Joe Blops	Sample Street
General	Dr Joe Blops	Colin Test
General	Dr Joe Blops	Sea View
General	Dr Joe Blops	Joe Test
General	Dr Joe Blops	Jane Test
General	Dr Joe Blops	Strand View
General	Dr Joe Blops	Sample Street
General	Dr Joe Blops	Michael Test
General	Dr Joe Blops	Main Street
General	Dr Joe Blops	Joe Test
General	Dr Joe Blops	Sample Street
General	Dr Joe Blops	Colin Test
General	Dr Joe Blops	Sea View
General	Dr Joe Blops	Joe Test
General	Dr Joe Blops	Jane Test
General	Dr Joe Blops	Strand View
General	Dr Joe Blops	Sample Street
General	Dr Joe Blops	Michael Test
General	Dr Joe Blops	Main Street
General	Dr Joe Blops	Philip Test
General	Dr Joe Blops	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: We will set up a scan no problem! Kind Regards Eimear

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:	Alliance Medical Charter Medical Radiology
Date of Birth:	29/03/1969 (Age: 48 years)	Clinic:	Ultrasound
Gender:	Male	Respondent:	Eimear O'Donnell
Address:	Main Street Swords Dublin	GP:	Blops Dr Joe
Mobile:	0875465454	Medical Council Number:	012121
HIS Patient ID:	HL0001	Address:	Demo Practice Lake Drive Citywest Dublin
		Phone:	1234567

Note: referral response messages are downloaded into the system via the standard Healthlink download module. This can be performed from any PC in the practice with a Healthlink certificate installed and is typically done 2 to 3 times daily by practice staff.