

Conduct a search within Socrates practice management software for a specified patient demographic e.g. Women aged 25-60 years.

## A. Generate a list of names and addresses

1. Click on the bottom left hand corner button 'Reports'. Then click 'Patients' icon from standard reports options. Then double click 'Full Patient Listing' option.

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🛞 STC Forms	Patients	Reports				
🔮 Close	<b>&gt;</b>	Full Patient Listing	Lists all the Patients in the System including their Address			
	Immunisations	Duplicate Date of Birth Patients	Lists all the Platents in the system including their Addess			
	2	Depicate Date of Dirtr Patients	Lists all the Patients who have the same DOB			
	Prescriptions	Duplicate GMS Patients				
			Lists all the Patients who have the same GMS Number			
	Investigations	Duplicate Patient Name				
			Lists all the Patients who have the same Name			
	4	GMS Patient Listing				
	Letters		Lists all GMS Patients in the System			
	- <b>1</b>	Consultation Summary				
	Accounting		Prints a Consultation Summary for a Patient			
	1	Consultation Notes Report				
🔞 Appointments	Appointments		Prints Consultations Notes Between Selected Dates for choosen Patients			
🙀 Waiting Room	<b></b>	Medico Legal Report	Dist. Completion Date: Annual discussion in the first state of the			
🐣 Patient Maintenance	Audit Log	Patients With Multiple Conditions	Prints Consultation Details (Immunisations, prescriptions, investigations, notes			
🐣 Consultation	- E	Patients with Multiple Conditions	Lists Patients Who have 1 or More of a List of Conditions			
强 Reports	Other	Patients with a Certain Condition				
2 Communication		r datares ward ou can condition	List all Patients with the selected ICPC Code			
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2. Select the 'Using the following criteria' option, then select 'Age' and type in the required age range e.g. 25-60 yrs, then select 'Female' in 'Gender' field. Finally select 'OK' and you will generate a list of women aged 25-60yrs.

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	<b>N</b>					Lists all the Patients in the System including their Address	
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			O D0	B 09/02/2009 💌 and	09/02/2009 💌	Lists all the Patients who have the same GMS Number	
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			Gende			Lists all the Patients who have the same Name	-
	2	GMS Patient Lis	tir (	Ji cindis			
	Letters		Patien	t Type All	•	Lists all GMS Patients in the System	
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	Accounting		Patien	t Status Active	•	Prints a Consultation Summary for a Patient	
		Consultation No	te				
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🙀 Waiting Room		5		DK	Cancel	Prints Consultation Details (Immunisations, prescriptions, investigations, notes	
A Patient Maintenance	Audit Log	Patients With M	ultiple Condit	tions			
A Consultation		Lists Patients Who have 1 or More of a List of Conditions					
强 Reports	Other	Patients with a Certain Condition					
Communication						List all Patients with the selected ICPC Code	
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B: Mail Merge: Send a letter to a specified demographic e.g. women aged 25-60

1. Click on the bottom left hand corner button 'Reports'. Then click 'Patients' icon from standard reports options. Scroll down the headings and double click the 'Mail Merge Patients' option.

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Reports (*)	â	Standard	Reports
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💕 Close		Consultation Notes Report	
-	<b>N</b>		Prints Consultations Notes Between Selected Dates for choosen Patients
	Immunisations	Medico Legal Report	
			Prints Consultation Details (Immunisations, prescriptions, investigations, notes
	Prescriptions	Patients With Multiple Conditions	
			Lists Patients Who have 1 or More of a List of Conditions
	Investigations	Patients with a Certain Condition	
	2		List all Patients with the selected ICPC Code
		Patient Visit History	
			Lists all the Visit Dates and what HCP the Selected Patient has Attended
		Patients GMS Review	
	Accounting		A List of Patients with GMS Review Dates
		Practice Distribution Breakdown	
🔞 Appointments	Appointments		Displays a Cross Tab Report on Age/Sex Distribution Breakdown
🙀 Waiting Room	- <i>«</i>	Heartwatch Patients	
A Patient Maintenance	Audit Log	Mulham Dubate	List all Active Heartwatch Patients
A Consultation		Mail Merge Patients	
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2. Select the 'Using the following criteria' option, then select 'Age' and type in the required age range e.g. 25-60 yrs, then select 'Female' in 'Gender' field. Type in the body of the letter you want to send in the field provided. (The header and footer for Mail Merge letters are set up by Socrates support and can be adapted). Finally, select 'OK'. You can then preview the letters before printing.

## Using Socrates to Carry Out a Practice Audit

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Reports 🛞	â		Full Patient Mail Merge	Custom Reports
Standard Reports     Insurance Reports     STC Forms	Patients	Reports	Full Patient Mail Merge	Custom Reports
Close	Immunisations	Consultatio	Full Patient Listing     Using the Following Criteria	Prints Consultations Notes Between Selected Dates for choosen Patients
	Prescriptions	Patients W	DDB         08/02/2009         and         08/02/2009         and           Age         25         and         60         and           Gender         Female         and         50         and	s Consultation Details (Immunisations,prescriptions, investigations, notes
	Investigations	Patients w	Patient Type All	Lists Patients Who have 1 or More of a List of Conditions
	Acters	Patient Vis	Default HCP All	Lists all the Visit Dates and what HCP the Selected Patient has Attended
	Accounting	Patients G	Letter Body Please make an appoinment for your smear test	A List of Patients with GMS Review Dates
Appointments Waiting Room	Appointments	Heartwatc		Displays a Cross Tab Report on Age/Sex Distribution Breakdown
Patient Maintenance Consultation	Audit Log	Mail Merge		List all Active Heartwatch Patients
Reports Communication	Other	Patient Me	QK Cancel	Create a mail merge for the chosen cinena Patient Medical Report
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