

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.

| 🧶 Socrates (1.5.0.0) - Dr. Am | ne Lynott Logged O | n - Dr Anne Lynott | | × | | |
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| Ele Edit Accounts Window He | qle | | | | | |
| Reports | â | Reporting 🕅 | | | | |
| Reports (*) | â | Standard Reports | | | | |
| S Insurance Reports | | Standard Reports | | My Tasks | | |
| 🛞 STC Forms | Patients | Reports | | | | |
| 🔮 Close | > | 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 | | | |
| | - 1 | 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 | | 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 | | | |
| ঝ My Control Panel | | <u> </u> | | | | |
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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.

| 🤒 Socrates (1.5.0.0) - Dr. An | ne Lynott Logged C |)n - Dr Anne Lynott | | | | | |
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| Reports | i | | | | Reporting | 1 | KS |
| Reports (*) | Standard Reports | | | | | | Contacts My Tasks |
| Standard Reports | | Ĩ | Full Patient Li | isting | | Custom Reports | ask. |
| STC Forms | | Reports | | | | V | 7 |
| Close | Patients | Full Patient List | in | Full Patient Listi | | | |
| | N | | | | | Lists all the Patients in the System including their Address | |
| | Immunisations | Duplicate Date of | of 🛛 🔿 Full Pa | tient Listing | | | |
| | | | Using t | the Following Criteria | | Lists all the Patients who have the same DOB | |
| | Prescriptions | Duplicate GMS F | | - | | | |
| | | | O D0 | B 09/02/2009 💌 and | 09/02/2009 💌 | Lists all the Patients who have the same GMS Number | |
| | | Duplicate Patier | nt 💿 Age | e 25 🛫 and | 60 🔹 | | |
| | | | 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 | |
| | | Consultation Su | m Defaul | RHCP AI | • | | |
| | Accounting | | Patien | t Status Active | • | Prints a Consultation Summary for a Patient | |
| | | Consultation No | te | | | | |
| | Appointments | | Rej | gistered 09/02/2009 💌 and | 09/02/2009 💌 | Prints Consultations Notes Between Selected Dates for choosen Patients | |
| G Appointments | a | Medico Legal Re | D | | | | |
| 🙀 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 | ŵ | Reporting | × |
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| | 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 | |
| 强 Reports | Other | Detient Medical Denast | Create a mail merge for the chosen criteria |
| Communication | | Patient Medical Report | |
| | | 1 | Patient Medical Report |
| ; | • | | <u>R</u> un Report |
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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

| Jsing Soc | rates to | o Carr | y Out a Practice Audit | National GPII Group |
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| Socrates (1.5.0.0) - Dr. An Ele Edit Accounts Window H | | n - Dr Anne Lynd | tt | |
| Reports | ¢ | | Reporting | S 🗙 |
| 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 |
| Ny Control Panel * Start © © © | | conduct a sea | Sorates (1.5.0.0) | Bun Report |