

ZEUS REFERRALS V3.0*– GP OVERVIEW USER MANUAL

March 2015



*Requires Socrates GP V2.0.2.0

Contents

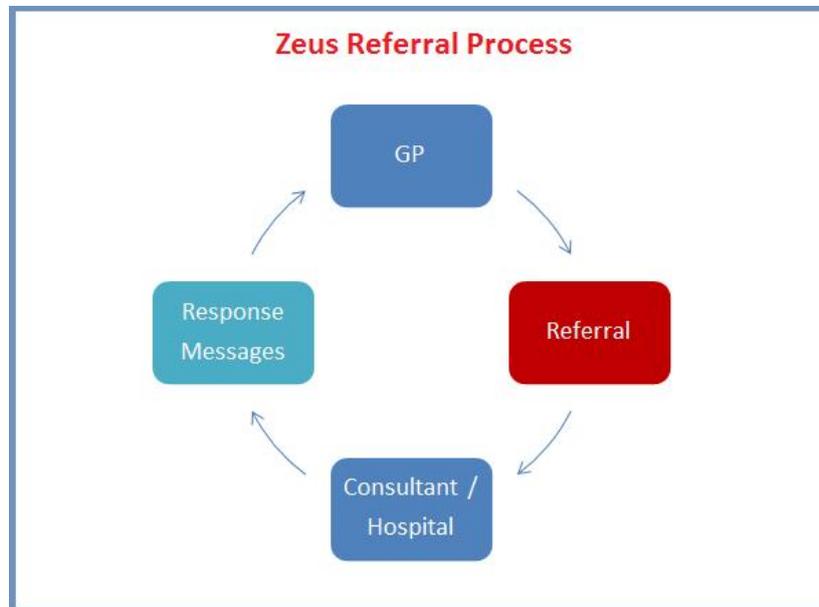
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Support

For more information or assistance please contact Zeus Referrals support on 071 9193600 or email support@zeusreferrals.com

About Zeus

Zeus is Ireland's first private e-Referrals and communications platform allowing GP's, Consultants and Hospitals to seamlessly refer and discharge patients and reduce admin costs in a fully safe, secure and traceable environment.



Why choose Zeus?

Data Security - All referral communication is managed within the secure Zeus platform which negates the need for posted, faxed or emailed referral /discharge letters and eliminates the likelihood of mislaid patient information. As information is electronically sent directly from the patient's chart, the integrity of patient data is unaffected by inaccurate transcriptions or illegible handwriting.

Reduced Costs - Removing the reliance on posted referral and discharge letters eradicates a significant administrative cost. Sending or receiving a referral using Zeus requires No printing, transcribing, envelope stuffing, franking or postage.

Communication – Zeus Referrals enables GP's to see in real time whether their referral has been accepted or delined by the Consultant or Hospital department and in turn whether the patient attends their scheduled appointment. Upon discharge, the GP receives an instant discharge notification directly to their desktop ensuring the patient's file is always up to date.

Patient Experience - Zeus Referrals improves the patient experience by removing the time delay; patients receive the earliest possible appointment date. Also, patients can be confident the Consultant is in possession of their most recent and accurate notes. Thirdly, as all referral information is communicated via the Zeus platform, patient data remains 100% secure and confidential.

Socrates GP – Zeus Referrals

1.1 Registration

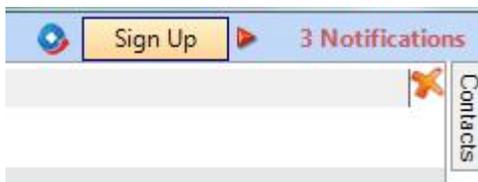
In order to use Zeus Referrals you must have **one Practice Zeus Account** and a **GP Zeus Account for each GP** in the Practice. You can register for both accounts in Socrates GP. Any user can register the Practice Zeus Account but a GP User must register/sign-in to their Zeus GP Account through Socrates GP in order to link their Socrates Log On to the Zeus GP Account.

1.1.1 Step 1: Register Zeus Practice

1. Click the **Practice Sign Up** button on the Socrates Home Page.



2. Alternatively, click the **'Sign Up'** link on the Socrates GP Home screen to register your Practice.



3. Ensure you enter the **Practice Email** and choose a Password.

Note: Once you have registered your Practice & saved your Zeus Practice credentials in Socrates you can then create Zeus GP Accounts.

Practice Registration Form

Practice Account Details

Practice Email: Confirm Email:

Your email address will be your username.

Password: Confirm password:

Passwords must contain an upper case letter and a digit.

Practice Contact Details

Name:

Address 1: Phone:

Address 2: Fax:

Address 3: Website:

County: Postcode:

Are you a single user practice? Yes No [What's this?](#)

Please specify if this is a single user practice by selecting Yes or No

Terms and Conditions

I agree to the Terms of Use and Privacy Policy

- For a single user practice you can create **one account** (email address) to use as the **Zeus Practice and the Zeus GP account**.

Are you a single user practice?

Yes No What's this?

Please specify if this is a single user practice by selecting Yes or No

- Once you select that you are a single user practice you can add the GP's name and Medical Council Number.

GP Details

Title	<input type="text" value="Dr."/> ✓	GP Name	<input type="text" value="Jim Smith"/> ✓
Medical Council Number	<input type="text" value="666999"/> ✓		

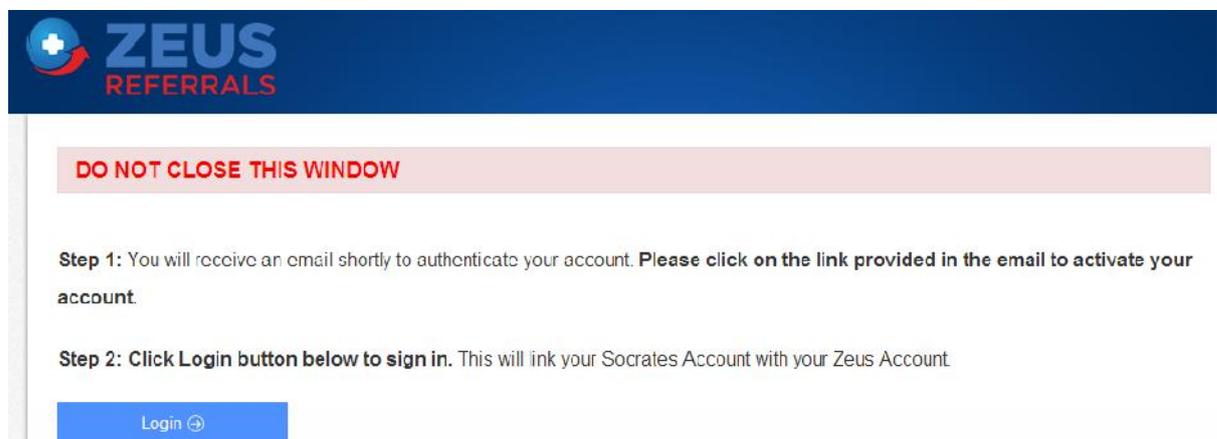
- Agree to the Terms of Use and Privacy Policy and click **Register**.

Terms and Conditions

I agree to the [Terms of Use and Privacy Policy](#)

Register

- After Registration the Login page will be displayed directing you to check the email account used during registration for the Zeus Referrals **Registration Confirmation Email**.



ZEUS REFERRALS

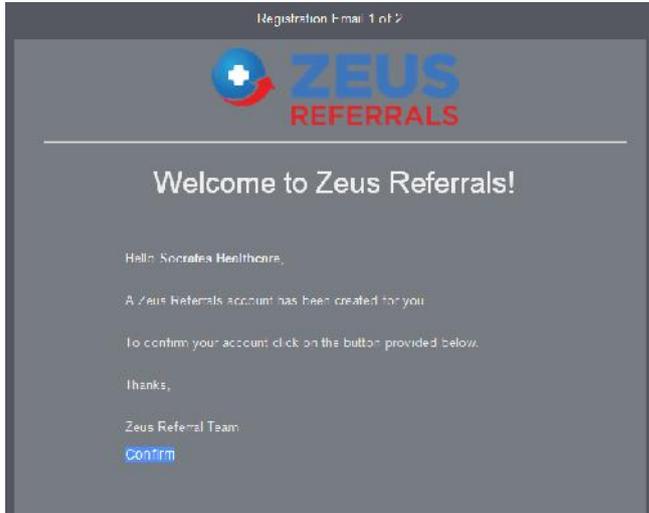
DO NOT CLOSE THIS WINDOW

Step 1: You will receive an email shortly to authenticate your account. **Please click on the link provided in the email to activate your account.**

Step 2: Click **Login** button below to sign in. This will link your Socrates Account with your Zeus Account.

Login ↻

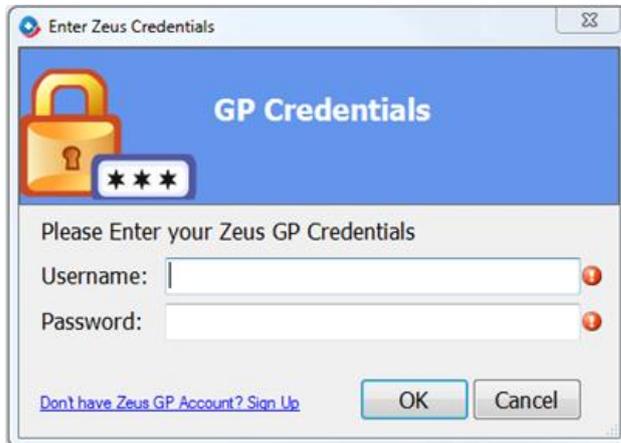
- When you receive the Zeus Referrals Welcome Email from Zeus click **Confirm**  to validate your email address. You will then receive a confirmation email.



- In **Socrates GP** click **Login**  and enter the username (email address) & password that you chose during Practice Registration.
- Your Practice Zeus Account details are now stored in Socrates GP.

1.1.2 Step 2: Register Zeus GP (GP User only)

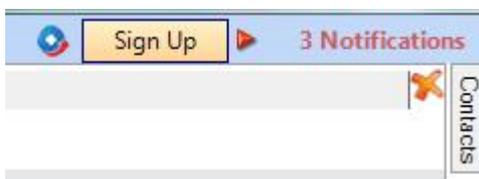
- When you have completed step 1: **Practice Zeus Account** you will be presented with the Zeus GP Sign-In form. Click the **Sign Up** link. [Don't have Zeus GP Account? Sign Up](#)



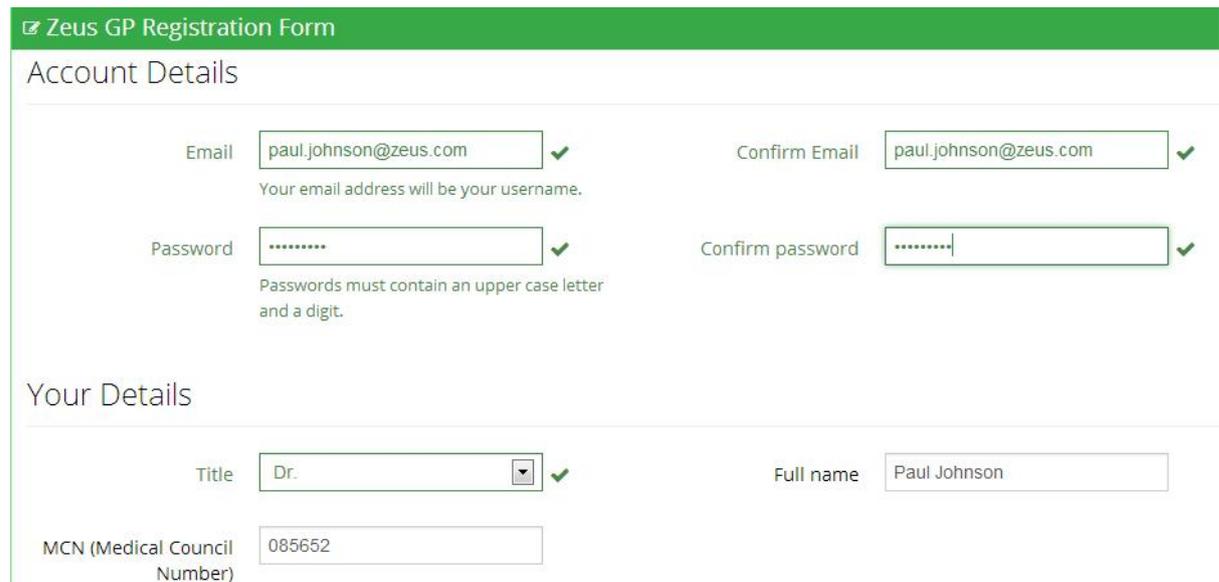
- OR If the Practice account has already been set up then click the **Sign Up Now**



button on the Socrates Home Page. Alternatively click the **'Sign Up'** link on the Socrates GP Home screen



3. Confirm your details on the form and choose a password.



Zeus GP Registration Form

Account Details

Email: ✓
Your email address will be your username.

Confirm Email: ✓

Password: ✓
Passwords must contain an upper case letter and a digit.

Confirm password: ✓

Your Details

Title: ✓

Full name:

MCN (Medical Council Number):

4. Agree to the Terms of Use and Privacy Policy and click **Register**.

Terms and Conditions

I agree to the Terms of Use and Privacy Policy

Register

5. When you receive the Zeus Referrals Welcome Email click **Confirm** [Confirm](#) to validate your email address. You will then receive a confirmation email.



6. In Socrates GP click **Login** [Login](#) and enter the username & password that you chose during the Zeus GP Registration.

7. Your Zeus GP account is now linked to your Socrates GP user account.

1.1.3 Single User Practice

If you have registered for a **Single User Account** then you need to enter your Username (email address) and password for both the Practice Login and the GP Login.

1.2 Send Zeus Referral

1.2.1 Zeus Referral Letter

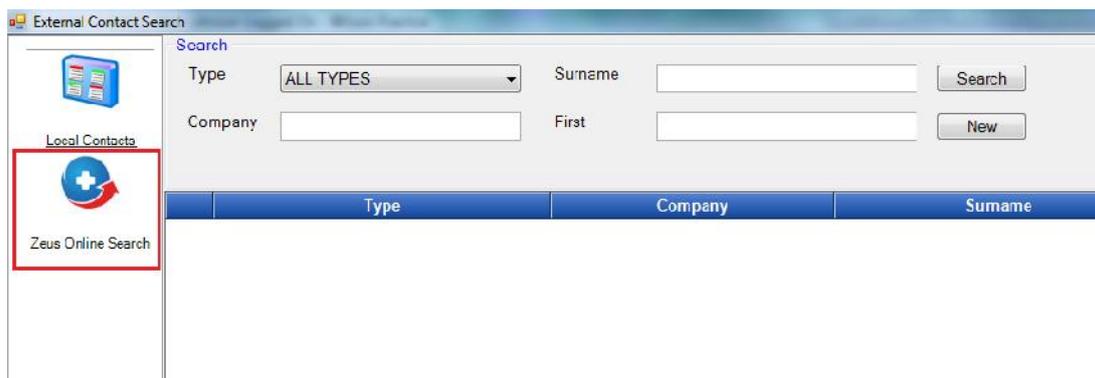
1. Begin a Consultation for the patient and navigate to the **Documents** section and to the **Letters** subcategory.
2. Select **Add Letter** or click the **Add** button.



3. If you are a non-gp user you can complete a Zeus Referral letter and send it on behalf of any registered Zeus GP **once the GP has entered his/her Zeus GP Credentials in Socrates GP.**
4. Click ... button on **Selected Reference** to open the Search dialog.

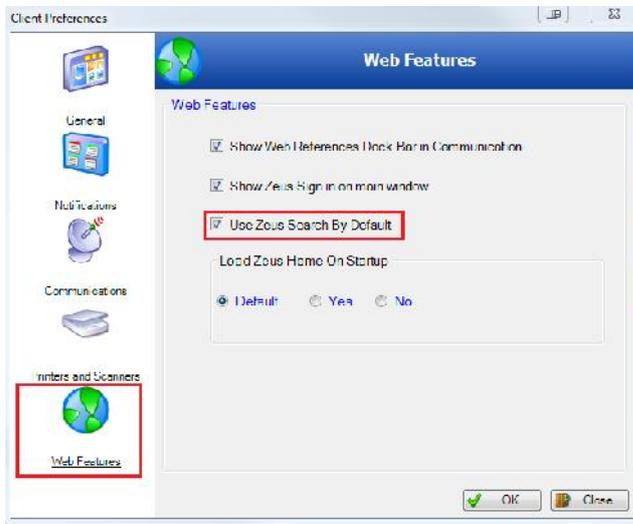


5. Click **Zeus Online Search** from the left hand menu.

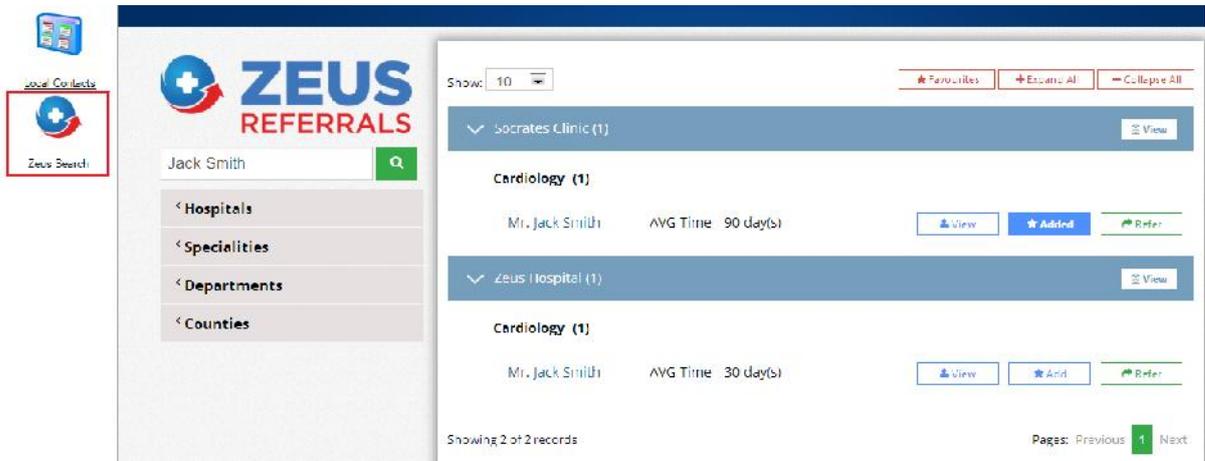


Note: You can select the Zeus Online Search as your default Search in **Edit > Preferences**.

- Select **Web Features** and check **Use Zeus Search By Default**.



6. Search for the Service Provider by entering the Service Providers name in the **Search field** and click  or press the enter key on the keyboard. Use the filters e.g. Hospital, Speciality etc to narrow your search.



7. To see additional information on the Institution or Service Provider before referring the patient click the **View**  button. You can also select the Service Provider's Name.

8. Click the **Add**  button beside the chosen Service Provider to add this Service Provider to your Favourites list.

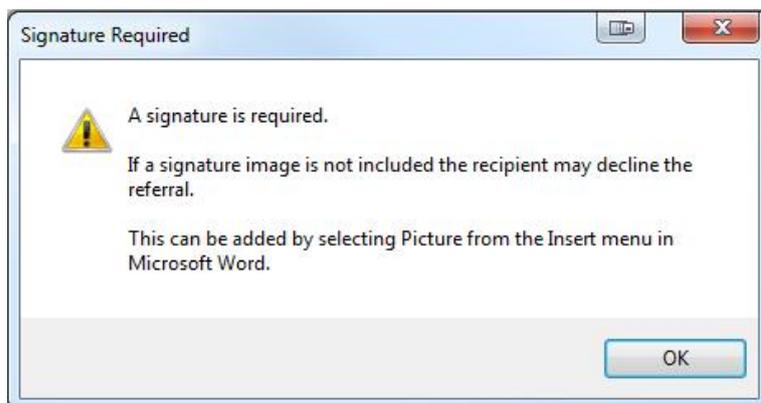
9. Click the **Favourites** button  to view your Favourites.

10. Click the **Refer**  button beside the chosen Service Provider to proceed.

11. Select the **Letter Template**. If you are sending the letter on behalf of a GP registered on Zeus select the GP from the **Zeus GP User** dropdown list and click OK.

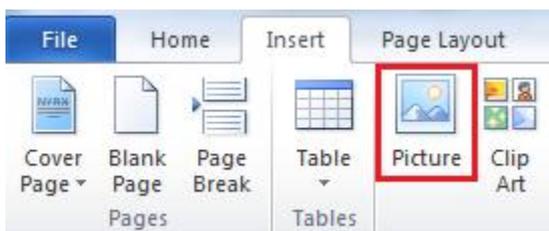


12. If the Service Provider requires a **signature image** on the Referral you will receive the following notification.



Note: How to Insert a Scanned Signature Image

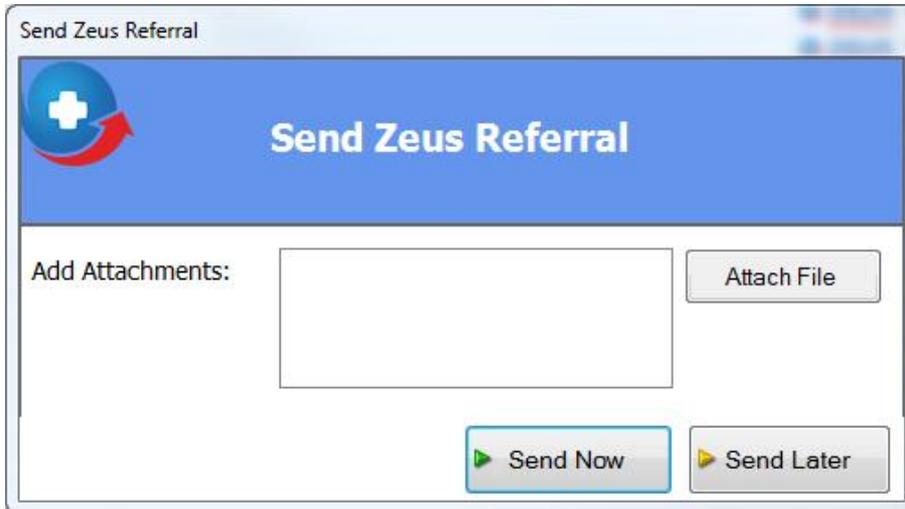
- Place the cursor at the correct position in the document.
- In the Microsoft Word letter click Insert and select **Picture**.



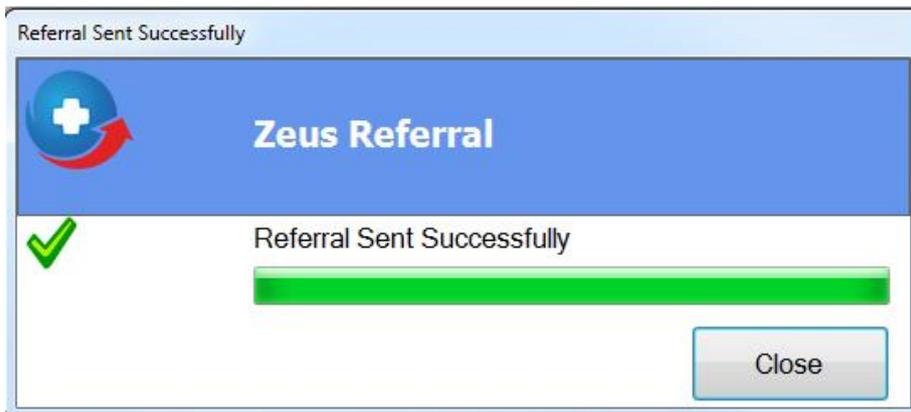
- Browse to the directory where you have saved the Signature image and select it.

13. Close Microsoft Word.

14. You will be presented with a dialog box to attach Socrates Documents and you can send the Zeus Referral now or later.



15. If you choose **Send Now**, you will receive a confirmation message when the Referral has been sent.



16. The Zeus Referral letter is saved in the **Letters** subcategory in Documents.

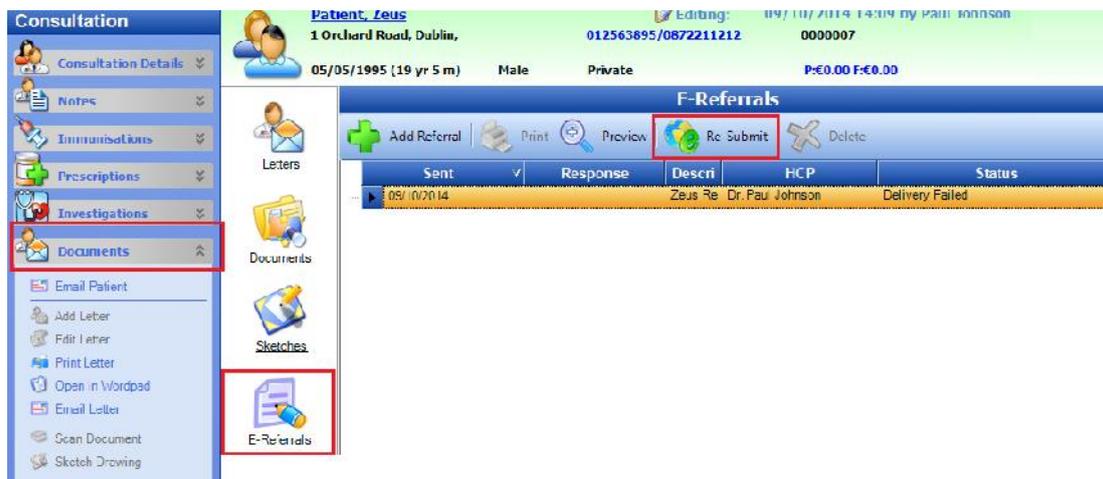


17. The Zeus Referral is saved in the **E-Referrals** subcategory in Documents with a status of **Delivered**. The E-Referrals section displays all electronic referrals and their responses.



18. If you click **Send Later**, the Referral will be saved to the Documents > **E-Referrals** subcategory with a status of **Not Sent**. Any Failed Zeus Referrals will be saved with a status of **Delivery Failed**.

19. To resubmit a zeus referral, select the referral and click **Re-Submit**.



20. All Unsent Zeus Referrals will be displayed in the **Document Reviewer** in My Control Panel.

1.2.2 Delete Zeus Referral

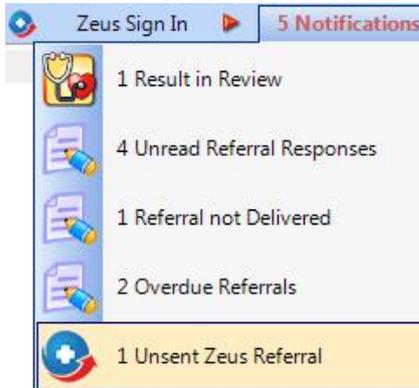
1. In the event that you create a Zeus Referral by mistake, you can delete any Unsent Zeus Referrals from the **E-Referrals** subcategory in Documents.



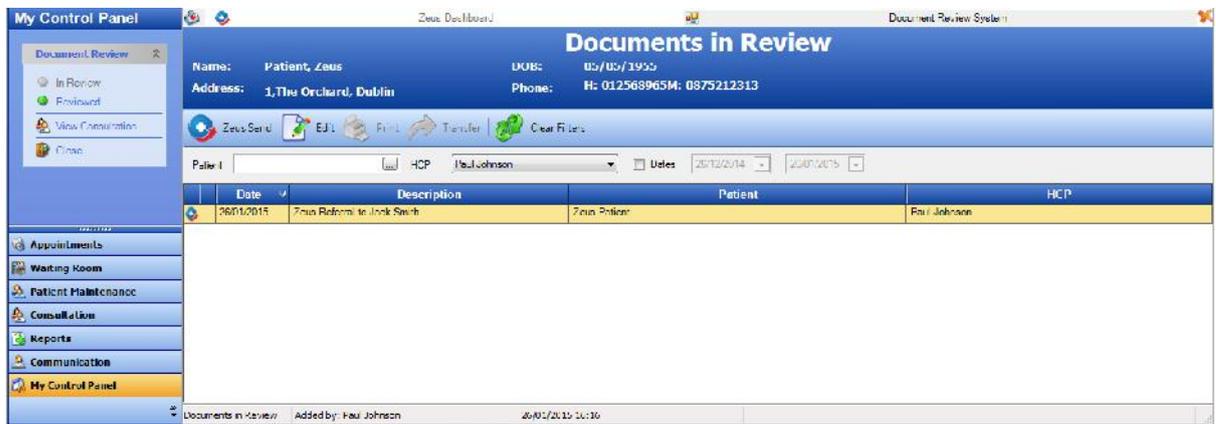
2. You can delete the Zeus Referral Letter from the **Letters** subcategory in Documents

1.2.3 Unsent Zeus Referral

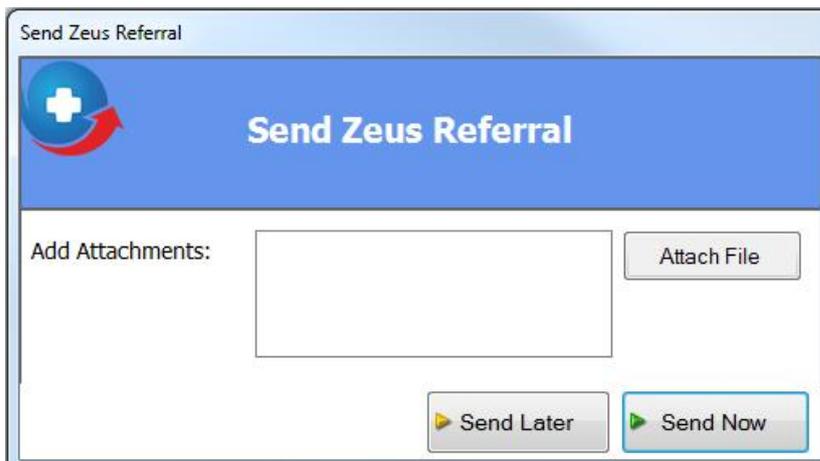
- Any unsent referrals will be displayed in Socrates Notifications.



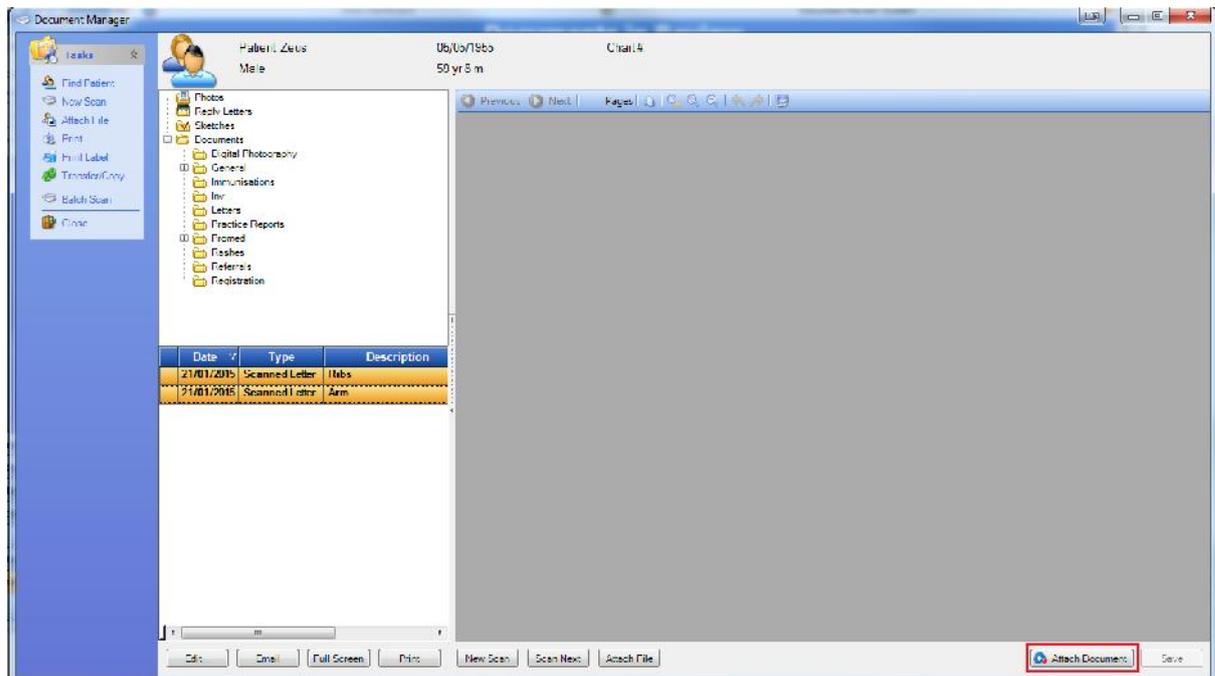
- Select the Zeus Referral and click **Edit**  to preview or edit the letter.



- Click Zeus Send  to add attachments or to Send the Zeus Referral.

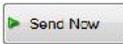
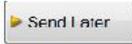


- Click **Attach File** to add attachments (PDF, JPEG, PNG or GIF) from Socrates Documents.



- Click **Attach File** in the Document Manager to attach a file from your computer / network to this patient's chart.

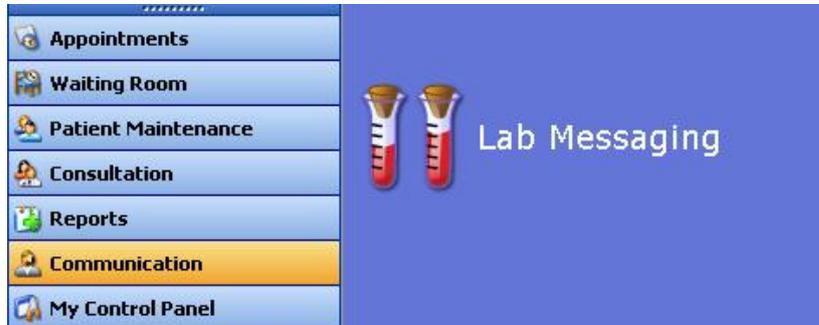
- Click **Attach Document**  to attach the file to your Zeus Referral.

- Click Send Now  or click Send Later . The Zeus Referral will stay in the Document Reviewer until it is sent or until it is deleted in the patient's chart.

1.3 Download Zeus Referral Responses

1.3.1 Download Responses

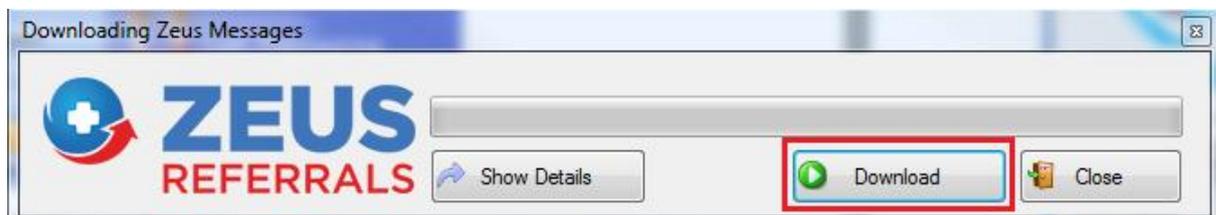
1. To download your Zeus messages go to **Communication** and select **Lab Messaging**.



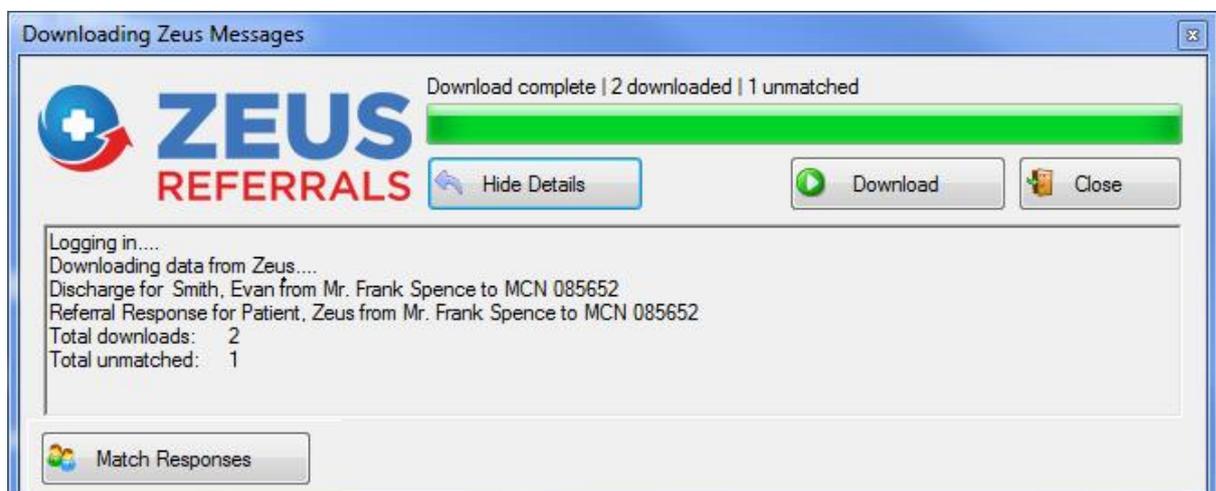
2. Click **Download Electronic Messages**.



3. On the Zeus Downloader click the **Download** button.

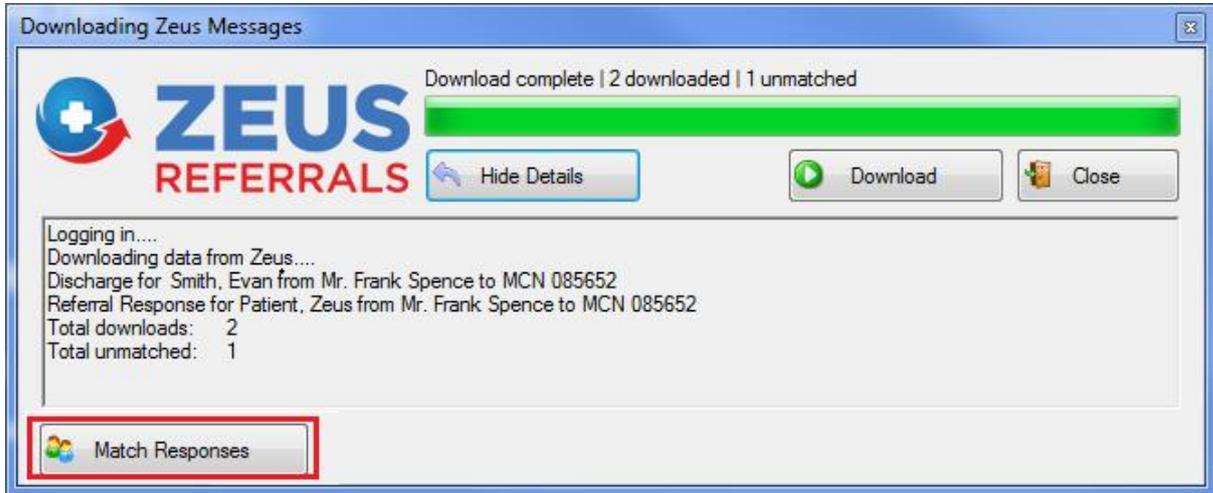


4. The matched referral response messages are saved to the patients chart and is displayed in the Result Viewer.

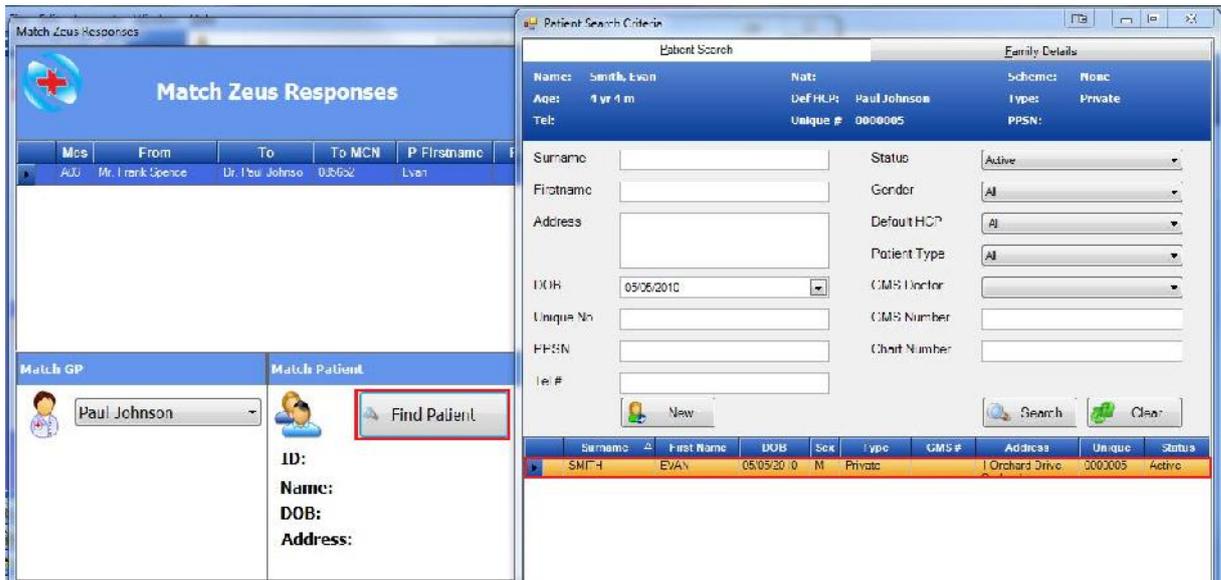


1.3.2 Unmatched Responses

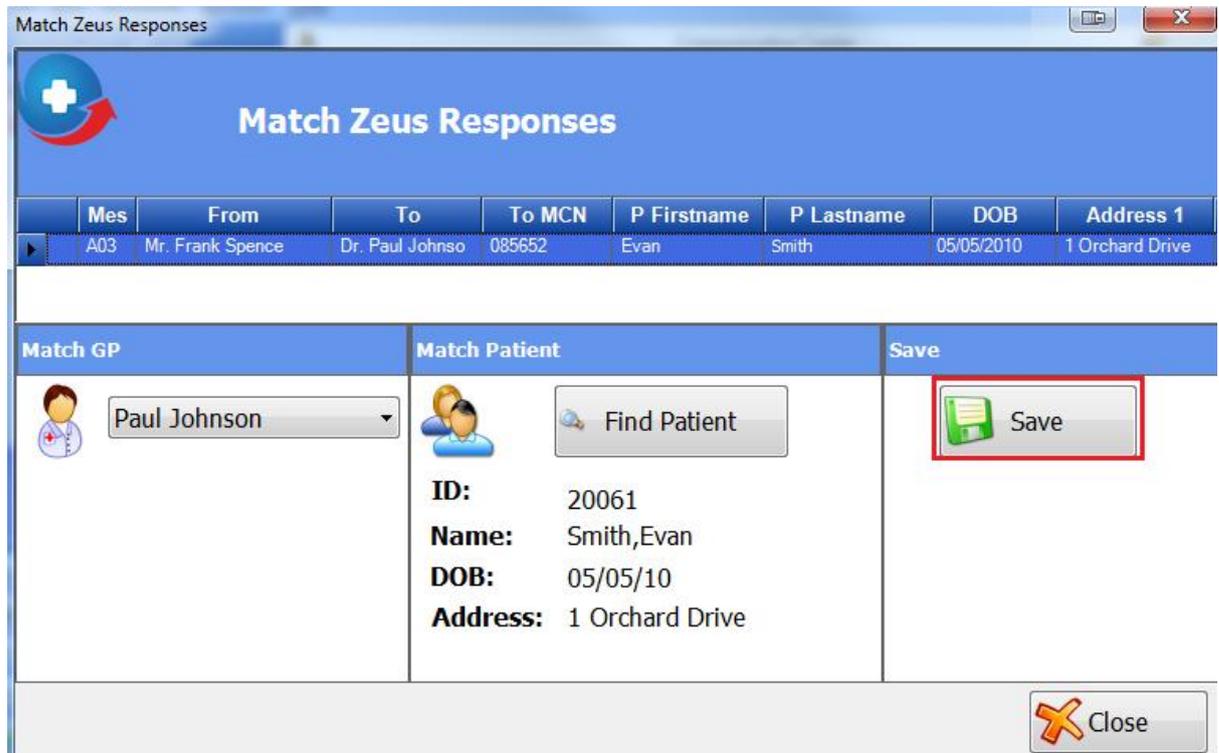
- Any unmatched referrals will be displayed in the Details section. Click on the **Match Responses** button to match these referral responses.



- Select the response message and click the **Find Patient**  button to search for the patient.



3. Double click to select the patient from the list returned or click the **NEW** button to register & match this response to a new patient.



Mes	From	To	To MCN	P Firstname	P Lastname	DOB	Address 1
A03	Mr. Frank Spence	Dr. Paul Johnso	085652	Evan	Smith	05/05/2010	1 Orchard Drive

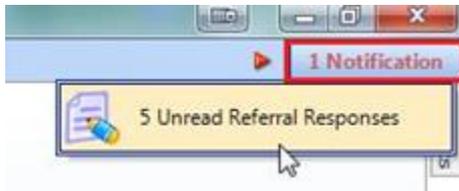
Match GP	Match Patient	Save
 Paul Johnson	 Find Patient ID: 20061 Name: Smith,Evan DOB: 05/05/10 Address: 1 Orchard Drive	 Save

 Close

4. Click **Save** button to save the referral response message to the selected patient.
5. Click **Close** when finished.

1.3.3 View Referral Responses

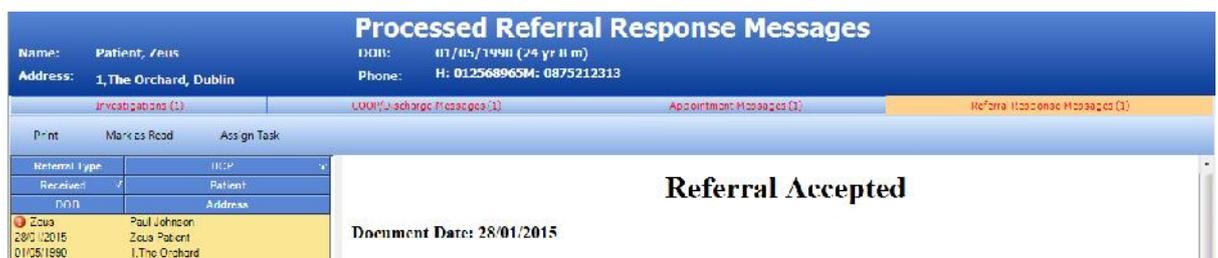
1. Click on the **Notification centre** (top right) to view all new notifications. (GP User)
2. Click the **Unread Referral Responses** which will bring you directly to the **Result Viewer / Referral Response Messages (In Review)** tab.



3. Alternatively, go to My Control Panel > Result Viewer and select the **Referral Response Messages** tab
4. Click on the message to preview the referral response.



5. To view any accompanying attachments click **View Attachments**.
6. Any response where the Service Provider has indicated that there is a **significant finding** will be displayed with a **red asterisk** in the Result Viewer.



7. Click **Mark as Read** to remove the response message from the viewer.
8. Click **Assign Task** to add a task for yourself or another member of staff.

1.3.4 Patients Chart

- To view the patients chart click the **Open Consultation** button from the Viewer Menu on the left hand side or open the chart from Consultation **Consultation**.



- In **Consultation Details** the original referral will show the most up to date status of the Referral. Double click on the referral to preview the original referral document.



- Double click on the E-Response to preview the response message.
- Select **Documents** and the **E-Referrals** subcategory to view all e-Referrals and their responses.



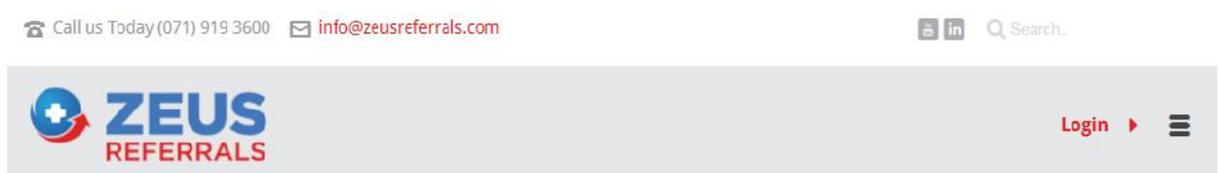
- Click on + button beside the referral to view all Zeus response messages. If the response message contains an attachment you will see a **paperclip icon** in the View Message button.
- Click the **View Message** button to view the response message.



1.4 GP Portal

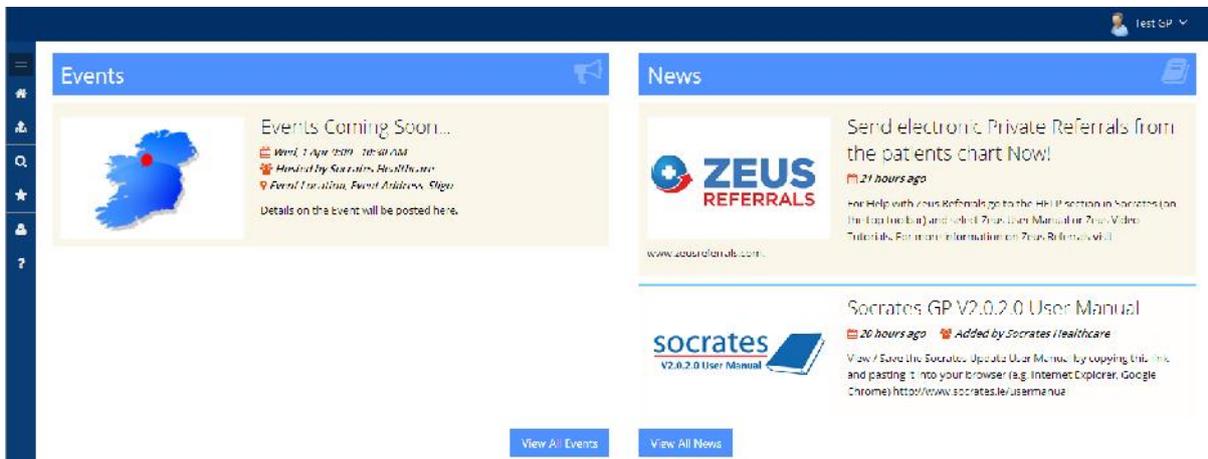
1. In Socrates GP the **Zeus Home page** should load by default as your new Socrates GP Home Page.
2. To access your Zeus Portal outside of Socrates GP go to <http://www.zeusreferrals.com> and

Click the **Login**  button and enter your username (email address) and the password that you chose during registration.



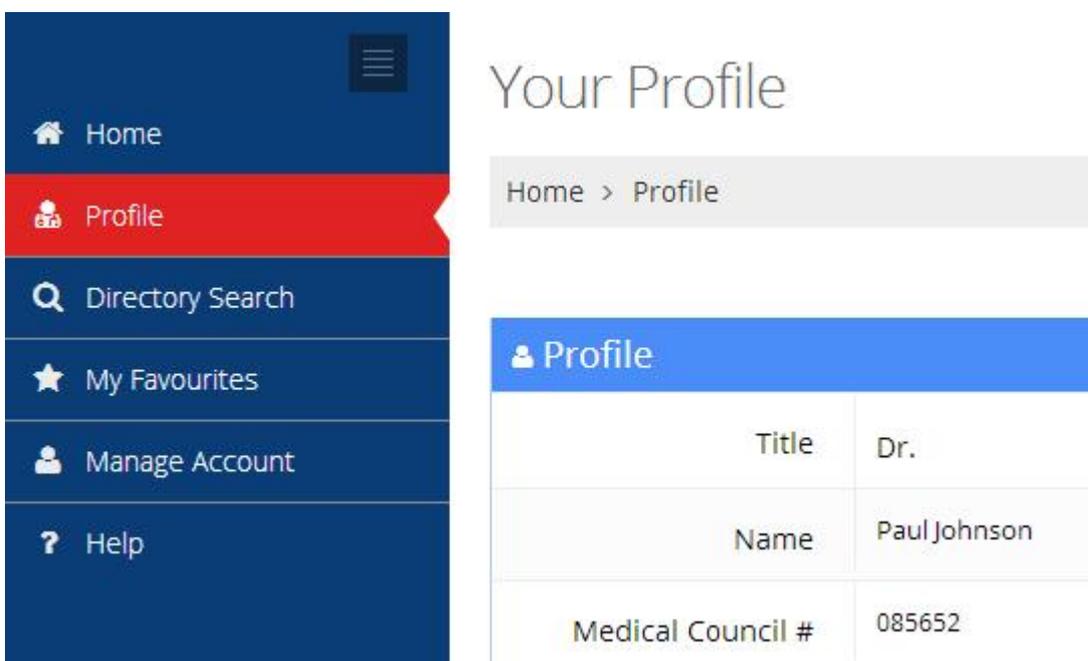
1.4.1 Home

The Zeus home page will be used to provide you with all the latest News & Events.



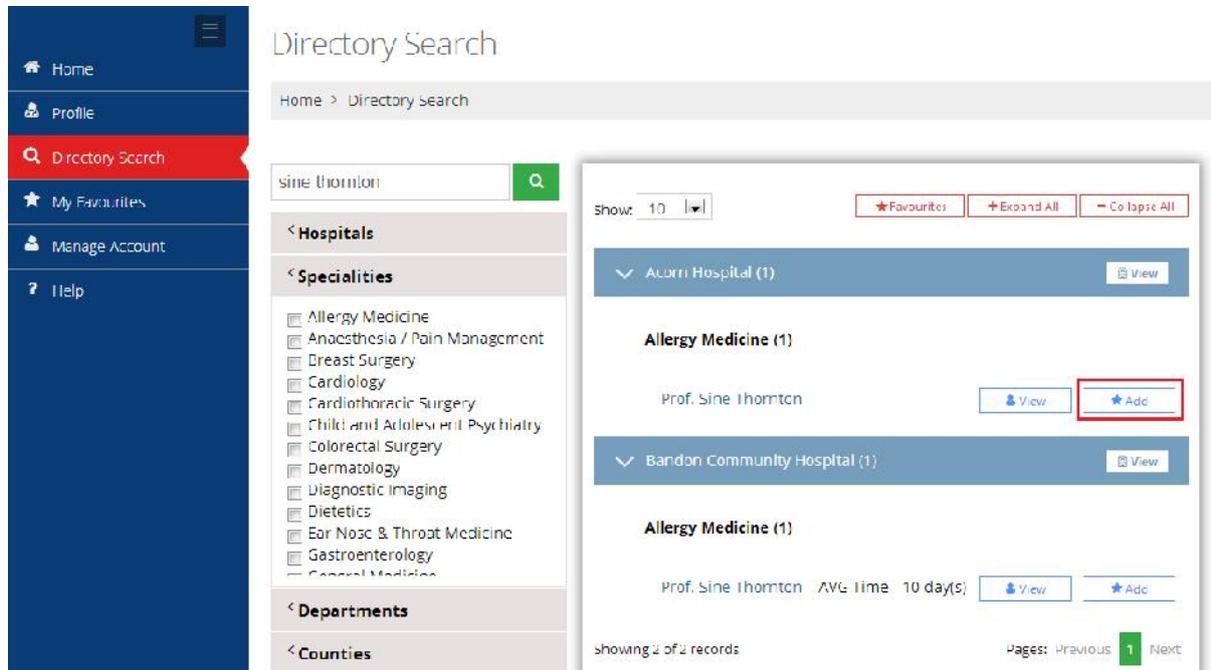
1.4.2 Profile

Click **Profile** to view the details entered during registration. Click the edit button to amend any details and Save.



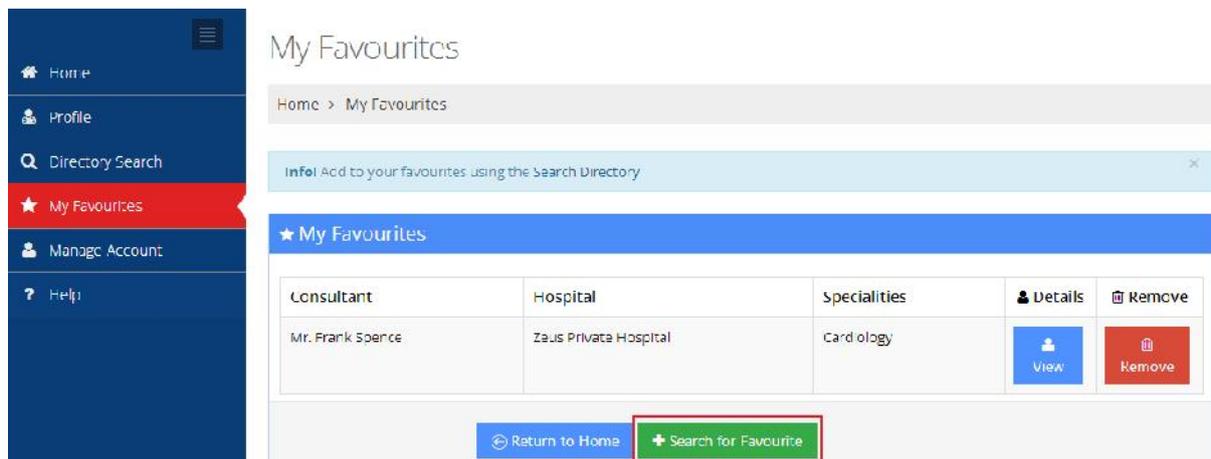
1.4.3 Directory Search

Search the Service Provider directory and click Add button  to add the service provider to your Favourites.



1.4.4 My Favourites

View your favourite list of service providers.



1. Click  button to search the directory and click Add button

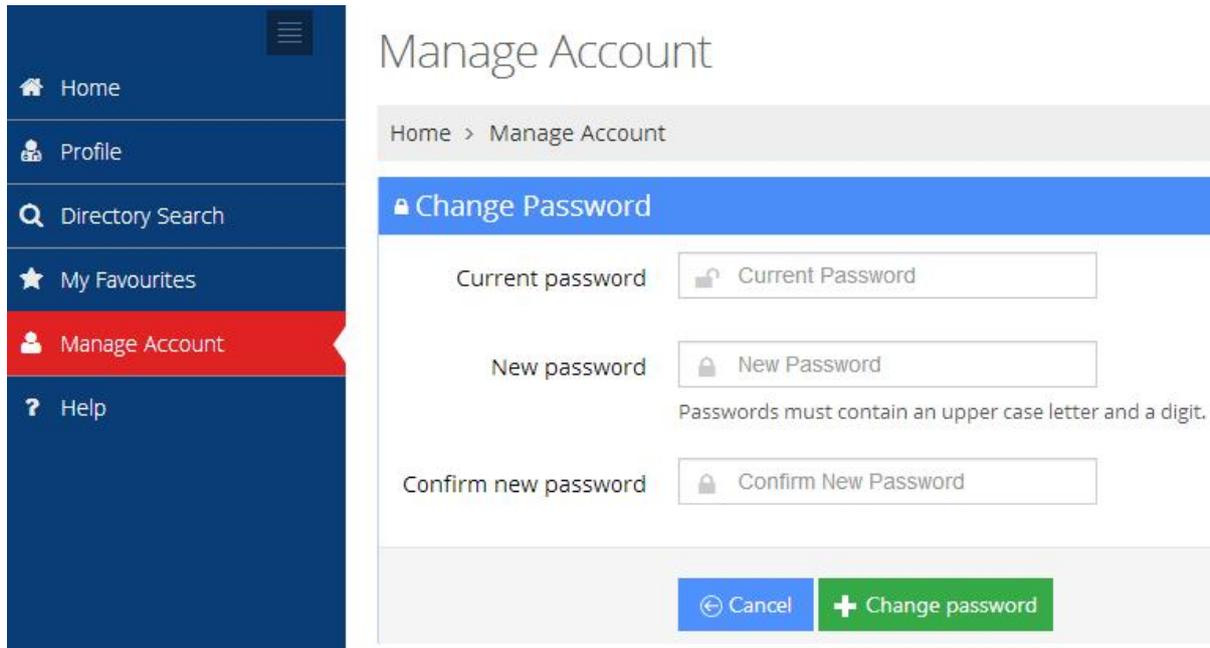
 to add the service provider to your Favourites.

2. To remove a Service Provider from your Favourites click Remove button.



1.4.5 Manage Account

To change your password click **Manage Account**.



The screenshot shows the 'Manage Account' page. On the left is a dark blue sidebar with navigation options: Home, Profile, Directory Search, My Favourites, Manage Account (highlighted in red), and Help. The main content area is titled 'Manage Account' and has a breadcrumb 'Home > Manage Account'. Below this is a blue header for the 'Change Password' section. The form contains three input fields: 'Current password' (with a lock icon), 'New password' (with a lock icon), and 'Confirm new password' (with a lock icon). A note below the 'New password' field states: 'Passwords must contain an upper case letter and a digit.' At the bottom of the form are two buttons: a blue 'Cancel' button and a green 'Change password' button.