Creating Favourites

There are several parts of Socrates where it is possible to save some of the fields as what we have termed "favourites" or defaults, which will then auto-populate these fields. Many of the intraoperative details and clinical examination parameters which will be recorded are common to certain procedures. This feature enables you to save these and populate them with one click the next time you are doing the same operation or examination which cuts down on data entry time. However, if you are going to use this feature it's important to read the instructions carefully, and set these up when you have some time as you don't want to be assigning incorrect details to the wrong patient. It's probably not a good idea to do this during a busy operating list when you are under pressure! If you are a spine surgeon you can also use this feature on the clinical examination screen which can save a lot of time for those patients who have mainly normal parameters.

WHAT SCREENS HAVE FAVOURITE OPTIONS

These are the screens where it is possible to set up favourites:

- The intraoperative fields on the surgery screens - all modules. Some surgical procedures such as the treatment of chondral defects, or revision arthroplasty procedures differ so much between patients that it's not logical to have a favourite assigned to these. A typical ACL procedure, a lumbar fusion, or TJR however, can be saved as a favourite as it's a more homogenous operation and most surgeons have a usual technique or two that they prefer.

- Some details on the history screen - surgeon and hospital name, assistant anaesthetist etc. these can be useful if you are using Socrates to write an operation report.

- The surgeon clinical examination and surgery planning screens of the Spine module

- Adding Implant sizes to the setup screen. Some implants, regardless of brand have generic sizing such as acetabular cups, femoral head sizes, tibial inserts etc. Once you have created the first list you can save this list and then automatically populate the size lists for any subsequent implant you might add.

Socrates has already been "told" which fields can be included as default fields, such as type of anaesthetic, fixation method for a certain implant, approach, brand of components, etc. If you choose a field that doesn't have this "favouriting" capacity, it won't be saved when save the screen. For example, the Charnley category will change for each patient, so it isn't one of the fields that Socrates has been "told" to allow as a favourite. The same applies for implant sizes. You can select a *brand* to place on a favourites list, but even if you have selected a size on your favourite, it will not populate for the next patient.

Once set up and saved, these fields are populated by selecting the chosen Favourite.

You can set up as many favourites as you like, For example, there could be one for Standard Total Hip Replacement, Brand X; one for Standard Total Hip Replacement, Brand Y; one for Resurfacing; one for Cemented Total Hip Replacement, ACL using allograft, ACL using autograft, Instrumented posterior lumbar fusion, Non-instrumented posterior lumbar fusion etc etc.

The screen shot below is an example of fields that can be selected as Favourites for an ACL procedure. Once set up, if that favourite is selected for the next surgery all these fields will be auto-populated the next time this

procedure is performed. It then requires the graft and tunnel sizes to be added, plus any changes specific to the current procedure which might differ from what the favourite populated.

WHAT FIELDS ARE ALLOWED AS FAVOURITES

Each screen has different fields that can be selected, depending on what makes sense clinically. For example, a chondral lesion requiring a chondral grafting procedure is unlikely to be standard from one to the next, so in this case, there are no fields allowed as Favourites. If you include fields on your selected favourites and they don't populate, you'll know they haven't been "allowed".

History screen Favourites

It is possible to set up Favourite options from the **History Screens on all modules**, so that the Surgeon, Assistant, Anaesthetist, and Hospital names fields etc. are all automatically populated when you select the associated Favourites name. In this way, you can set up routine teams for the different types of surgery you do and the different days and places you operate. The diagnosis and procedures names as well as the diagnosis and procedures codes on this screen can also be set up as a favourite.

Surgical details screen Favourites

Hip General

The common details have been set up to allow you to choose the Operator, Approach, Anaesthetic, Number and Name of portals, and the Type of surgery. Additionally, the first two tabs contain fields that you can save as Favourites. On the "Synovium, Capsule, and Lig Teres..." and "...Mapping" tabs, you can select "Normal" for pathology and "None" for treatment. If you save this combination as a "Normal" template, and select it when you have a surgery that has mostly "normal pathology", the data entry becomes simplified: you only need to change those elements that are not normal. All of the fields in the surgery "lite" screen can be saved as favourites. The next example shows how your screen would look if you selected the Normal values tick first as a short cut, then selected the fields from the top section you wanted as favourite surgeon, anaesthetic, portals, etc. and saved these as a Favourite.
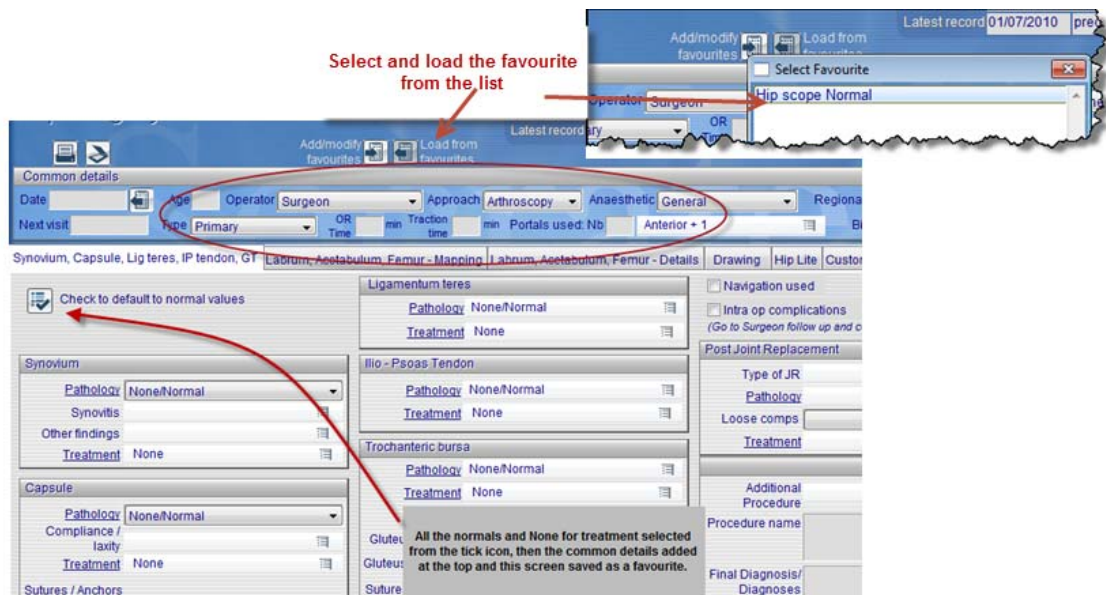
Knee General Favourites

You can set up Common details, Operator, Approach, Anaesthetic, Number and Name of portals, the Type of surgery, for all the tabs.

ACL screen – You can save the majority of fields for an ACL procedure, including the diagnosis and procedure name.
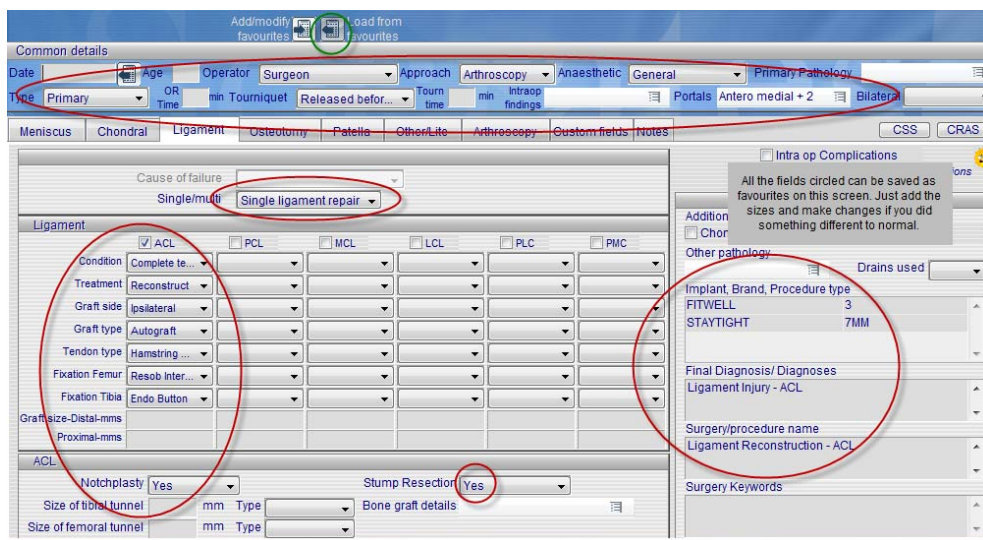
Arthroscopy Screen Favourites

Most of the fields on this screen can be saved as Favourites. This process can also be made faster by choosing the normal ticks first, changing what you want, then adding the other fields relevant to the surgery you are saving it for.

The example below was set up for a medial meniscectomy and ACL using only the Arthroscopy screen. You could have also chosen to select the full ACL screen if you wanted to record more detail than is on the arthroscopy screen, and added these in to the same Favourite. Note that if you used the main ALC screen, some of the detail will cross-populate into the Arthroscopy Screen, such as tear type (partial complete, etc.), and treatment (reconstruct, debride, etc). This enables you to search in either place for all your ACL partial tears, for example – it doesn't matter which screen you used; it will show up in both places in the search.

Favourites saved for a routine partial medial meniscal tear and resection with ACL (on the next tab)

Additional fields for the ACL, treatment and includes diagnosis, procedure name and implants and sizes usually used.

Hip and Knee Arthroplasty Favourites

You can choose and save common details (Operator, Approach, Anaesthetic, Type of surgery); surgical details (Procedure and Approach); and implant details (Brand, Type, Bearing Surfaces, etc.).

These are the fields that can be selected as favourites from the Hip arthroplasty surgical details screen.

Shoulder Favourites

You can set-up almost all of the fields on the shoulder surgery screen that are not size dependant.

Spine

- All the intraoperative details on the spine can be saved.

- The clinical examination details. This enables a spinal surgeon to save the parameters that they would routinely examine as favourites. This would normally only apply to saving normal values. There is also a normal notes section in the General, Lumbar, Cervical, Neurological and Gait tabs. Each physician can add the text that they would normally want to appear in their report, include the tests/exam fields that they would normally perform and save it as their routine normal favourite. If the user doesn't want any of the additional fields other than the normal text to be included (skin status, crepitus, step off etc) they simply don't select any of the additional normal values for these fields and would probably not include the text in the normal notes that says "the following tests were performed". Below is an example of some parameters that was saved as normal for the lumbar spine examination screen. In addition to text added to the normal notes. These can be combined with tabs from the other screens, so if you would normally examine the cervical and lumbar spine fields what you select from both these tabs could be included as a favourite. You would choose a name that would identify this, for example "lumbar/cervical normal".

If an operation report was being generated from the data above, it would appear like this. The layout, and general appearance can be changed by the user.

The patient has no significant abnormalities in the lumbar spine. Range of motion appears full/unrestricted and pain-free. The following tests were performed.
Skin normal
Paravertebral muscle spasm: None
Tenderness to palpation: None
Crepitus: Yes
Step-off: yes
Range of Motion is unrestricted, movement is painless
Coronal Balance: Neutral
List: none
Sagittal Balance: Neutral
Cooperation with exam: Normal

- Spine surgery planning. This screen allows you to enter the details you need to to plan for a scheduled surgery. Since many procedures require standard equipment and implants, selecting these as a favourite for each of your common procedures saves time. It's very easy then to create a report from this screen which can then be emailed and sent to an assistant, OR manager or whoever is relevant.

Post Op and Rehab screen Favourites

All the fields from this screen including the text boxes at the bottom can be saved as favourites.
Set up as many favourites as you want, both in the drop down fields if you want to use any of them, and the two text boxes for medications and post op orders at the bottom.
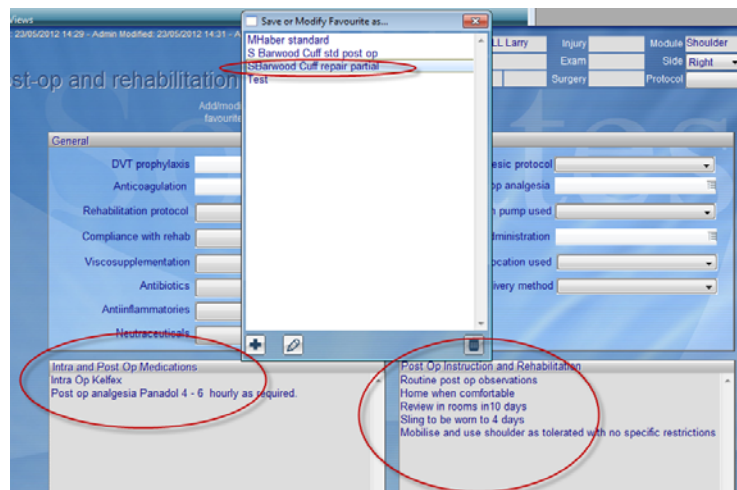
HERES A TIP: Once you have set up all your favourites, you can generate a surgery report from data that has been entered. This can also include the post op and rehab details. If you have set up favourites, these will populate into the surgery records, and then if you have included these fields to be in the report the text will automatically be in the report. This takes only a few seconds. Go to the chapter on Report generating and word processing for how to do this. The data below was set up as a standard post-op Cuff repair favourite which included the medications and discharge/post-op details as part of the favourite. The medication and post-op instructions field were then selected to be populated on the word processing operation report document, and will automatically appear in the operation report.

Medications
Intra Op Kelfex
Post op analgesia Panadol 4 - 6 hourly as required.
Post Op Instructions
Routine post op observations
Home when comfortable
Review in rooms in10 days
Sling to be worn to 4 days
Mobilise and use shoulder as tolerated with no specific restrictions

HOW TO CREATE A FAVOURITE

To create your own Favourites lists, first navigate to the Screen for the module and section that you want to save the data from. It will either be the history, post op and rehab, the surgery details screens or the clinical examination details (spine module only) as these are the only screens that allow favourites.

You have two options, from here, you can either use real data from a real surgery to save your favourite, or create a dummy surgery record, and create your favourites here. However , if you are using the spine examination screen to create favourites we don't recommend you create one from a screen that has ever had data entered into it - start with an empty screen. This is because there are 11 tabs covering all the anatomical regions, as well as 3 in the surgery planning details that can all have data saved as favourites. It would be very easy to have data in some of these other screens/tabs that you didn't notice, and thus create or modify a favourite with these old data in it which would then populate into the next surgery you selected at for. Therefore, when creating or modifying a spine examination or planning favourite always start on a screen that has had nothing entered previously.

1) Using a real surgery. Normally you would do this if you have entered details for real patient for a commonly performed surgery that lends itself to being a favourite Enter all the details for that surgery, and then before you save it for that specific patient, name and save it as a Favourite, then save the data for that patient. For example, you may have just done a routine cemented total hip replacement or a routine instrumented posterior spinal fusion for a real patient. If this was typical of the standard procedure you could save this screen as a favourite before saving the details entered for that particular patient.

2) Using a dummy/test surgery. Create a record in the module you want and go to the relevant screen - surgery details history screen we want to save the details. You need to be in modify mode to be able to see the favourite icons. Enter the details you want then name and save these details surgery as the Favourite. You can then use the **red cross icon** at the bottom of the screen to clear the data and then set up your next Favourite on the same screen, clear the data again, etc. once you have finished, creating your favourites, you can delete that entire surgery record for your test patient from the demographic screen.

*You need to be in **Modify mode to be able to view the icons to set up and load the favourites.***
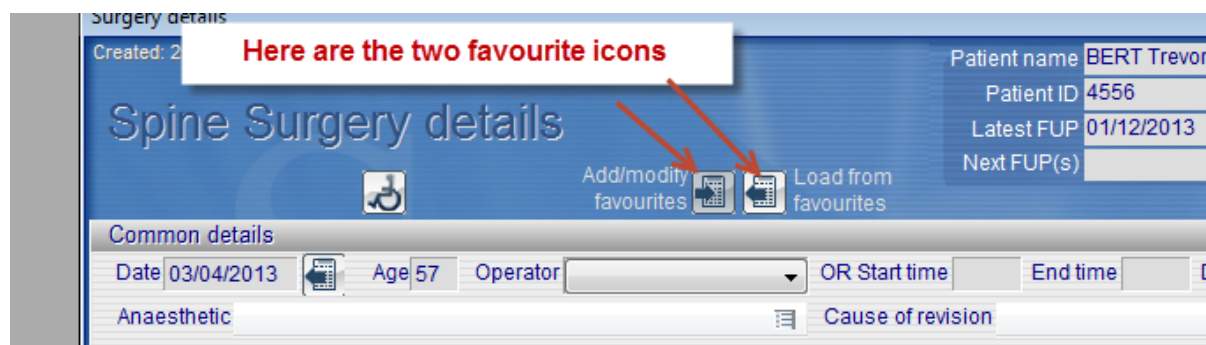
After you have selected all the fields you want from the different tabs before you save the favourite check all the tabs to make sure you haven't selected fields - you don't want, or maybe have some fields from a previous record in one of the tabs that you can't see that you don't want in that favourite.

When you have selected all the fields you want to include in this Favourite surgery, click on the **Add/Modify Favourites icon** near the top of the screen. (Do *not* press the **Enter key** or the **Save tick**.)

The next window asks you to assign a name to this Favourite. Click on the **Add icon**, then type in a name for this Favourite so you can easily recognise it. Only those fields that you pre-selected will be saved as Favourites fields for this surgery. If you include a field as a favourite that isn't allowed (such as the date of surgery) it will just not populate when you load the favourite for the next surgery.
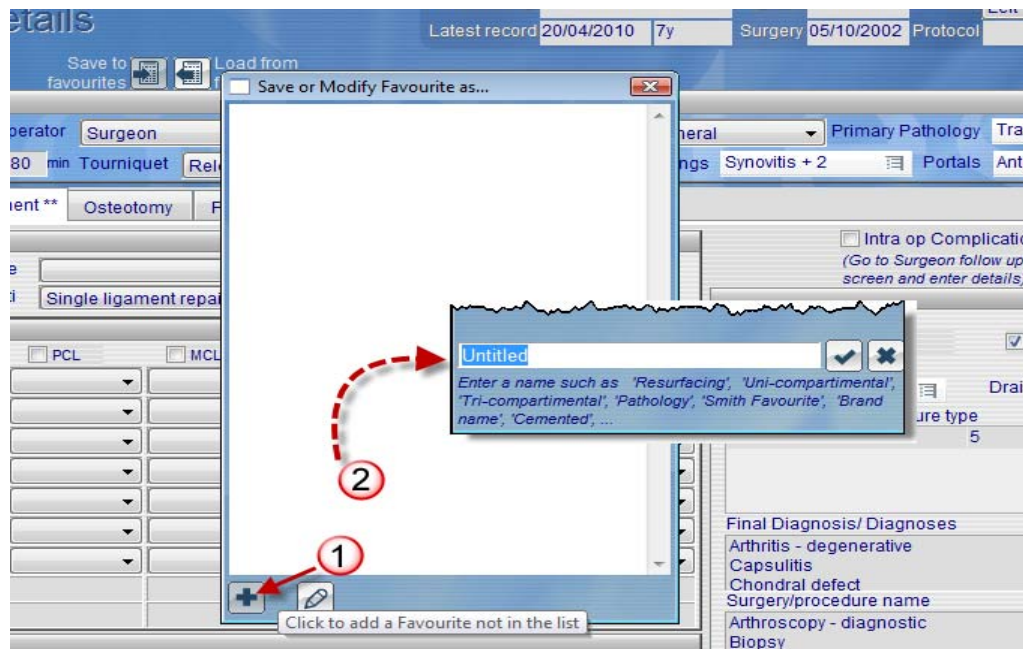

IMPORTANT

It's very important before you save a favourite that you check all the tabs on that section, as there could be data on some of these other tabs that you haven't seen and don't want for this favourite. This is particularly important for the shoulder, as there are a number of tabs and is quite common for a surgeon doing a cuff repair for example to need to go to the Capsule and Labral tab to add to data. Therefore if you have data on these tabs, but save your favourite from the rotator cuff screen, you won't see the data on these other two tabs and may not want them included in that favourite. A good habit to get into as each time you save a new favourite check all the other tabs on that screen to make sure that they are either empty, or what's on them is what you do want save for that particular favourite.

> Make sure that you check every tab/screen before you save a favourite.
>
> Otherwise, you could end up saving data that you don't want included.

POPULATING A FAVOURITE

The next time you navigate to the Screen where you saved the favourite, click on the **Modify icon** if they are not displayed. This will bring up the Favourite icons as below. The one on the left is where you save the data, the one on the right is where you also populate the data from the favourite. Click on the icon on the right, **Load from favourites** and your list of saved Favourites will appear.
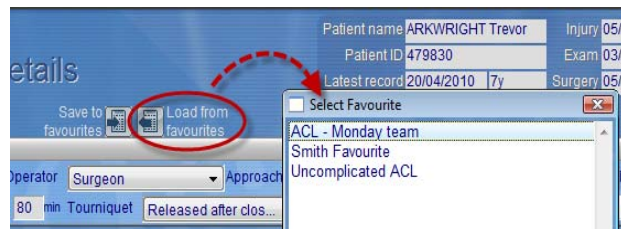
Double-click on the Favourite name you want, and the fields will be populated with those you specified during set-up of the Favourite. Of course, you can make changes to any of the fields if there are exceptions that occur during this particular procedure.

You should load the favourite right at the start, and then add or remove whatever fields may not be appropriate for that particular surgery. If you add other data first then load your favourite it will override whatever data have entered and you will have to change it again. Once you have populated the screen/s make sure you check all the other tabs as well to ensure that there is not something else on those tabs that may not be relevant for that particular surgery.

> Load the favourite first, then make the changes. Always check the fields and the
>
> other tabs before you save that record.

MODIFYING A FAVOURITE

Once a Favourite is saved, if you change your technique, have a different assistant or use a new brand of implant for a standard procedure for example, you can change the Favourite.

There are two ways to do this. You can start with a blank (new) screen and enter all the details you want again to be your new Favourite and then delete the old one.

Or you can make the changes on the screen to what you want the new favourite to be. Then select the favourite and click on the modify icon. What you are seeing on the screen (and any of the other tabs that might be hidden also) will now become the modified favourite.
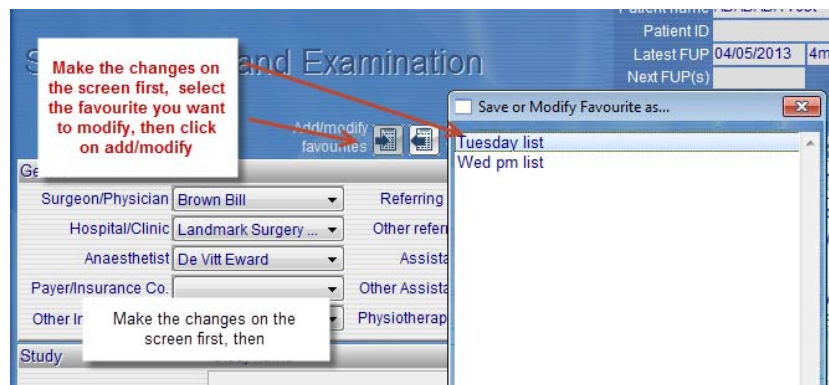
You will see a message asking you to confirm. This step is to make sure that what is on the screen is what you want to become the modified favourite, since this is what will be saved. Note that if the screen was empty and you click on **Modify**, the Favourite will become the empty screen.

An alternate method is to go to a new screen and set up the fields for the Favourite as you now want it to appear, instead of starting with the old one, then click on the **Add/modify icon**. Select the name of the Favourite you want to modify, Select Yes, you do want to change the Favourite to the new fields you have entered on the screen, and the favourite will now be updated.

After a modified favourite you will get a window with the following message.
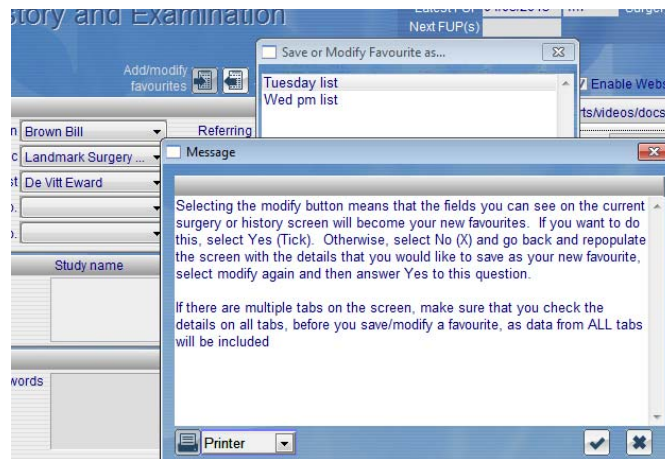
It is important that you check all the tabs on the screen if you modify a favourite or may end up with data that you don't want saved.

SPINE EXAMINATION SCREEN FAVOURITES
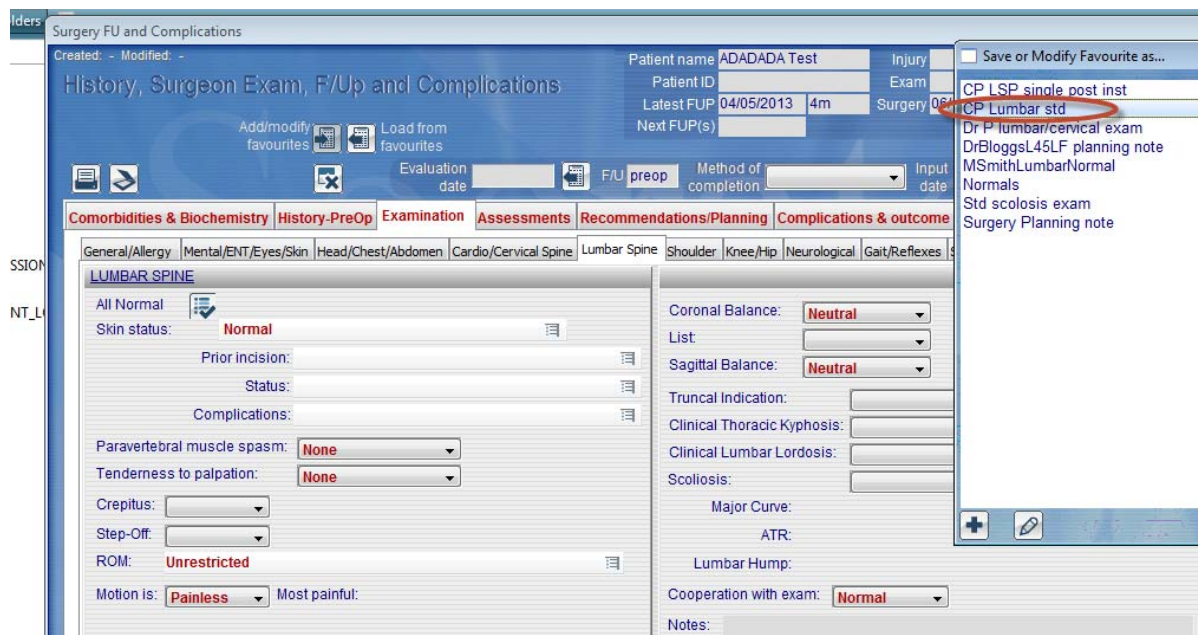
IMPORTANT THINGS TO KNOW

Here's a quick summary of the important things to remember when using favourites

- Take care when setting them up, and check every tab on the screen to make sure that you hadn't saved something in one of the hidden tabs that you didn't want to.

- Always populate your favourite into the screen before you enter any other data - then the make your changes.

- If you are modifying an existing favourite be careful to check all the tabs before you save it. If you are using the spine examination screen always create your favourites with a new empty screen.