

SOCRATES Webscores

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HOW IT WORKS

Socrates webscores allows practices to collect outcomes surveys and scores directly from their patients via an email link, or in the clinic with the data input online by the patients themselves. This is in addition to the existing data entry methods which are either manual data entry, or the use of the proprietary scannable forms which populate the screens. The patients do not connect to Socrates, they are only accessing the address of the Socrates web server where their scores due are stored via the internet.

The system works in much the same way as if you were sending out forms via mail except it is using electronic mail. Some forms might go out to patients by mail, and others are filled in when the patient is in the clinic. The webscores will send the scores or surveys out electronically to the Socrates web server when they are due for completion. The web server is acting as an electronic post office, either sending an email to the patient (the email method) or holding it until they come into the clinic and complete it online. The user (you) decide which method to choose for each patient and both can be used for the same patient. When the patient fills them in online they will be available to be uploaded within seconds into your Socrates program via the web server. Obviously patients using this service need to be capable of using a computer or tablet and have access to a computer connected to the internet. Users will have to make the decision on an individual patient basis whether they think the patient can manage the process, it is likely that not all patients will be able to use a computer or tablet. If the patient isn't a candidate to fill in the webscores the web enabled option isn't selected for that surgery.

There are 2 methods of creating web scores. The first is a "set and forget" using follow up protocols which have set follow up periods and scores assigned to each time point. Once set up, the scores will automatically be sent out to the patient at the prescribed time points elected by the user. The other is a manual or "stat" system where you can elect to send any score/s, to either an individual, or group of patients at the current time point. Read the section on **Protocols** for the first, and **Manual Method** for the second. Over time you will most likely use both. The surveys are returned back to the user's copy of Socrates almost immediately by the Socrates web server. If the patient is set up to receive their forms by email they will receive an email approximately 3 hours after the first email is sent and thereafter on the due dates.

Using the protocols method you only have to set it up once - after that the program automatically sends the surveys out at the due times, and the answers are uploaded into your copy of Socrates automatically. Users create follow up regimes or protocols and assign which scores/questionnaires they want completed at certain time points for each patient's record. Each record is then assigned to one of these protocols and the system then queues the scores/questionnaires to be either sent to the email address set up for the patient, or queued ready for completion online in the clinic at the time of the patient's visit at the due time point.

There will be 3 options available in Socrates to enter patients' scores/surveys. Socrates treats the scores just the same regardless of whether they are entered via the web, scanned in or manually entered in terms of the scoring, statistics, and data analysis. The options are:

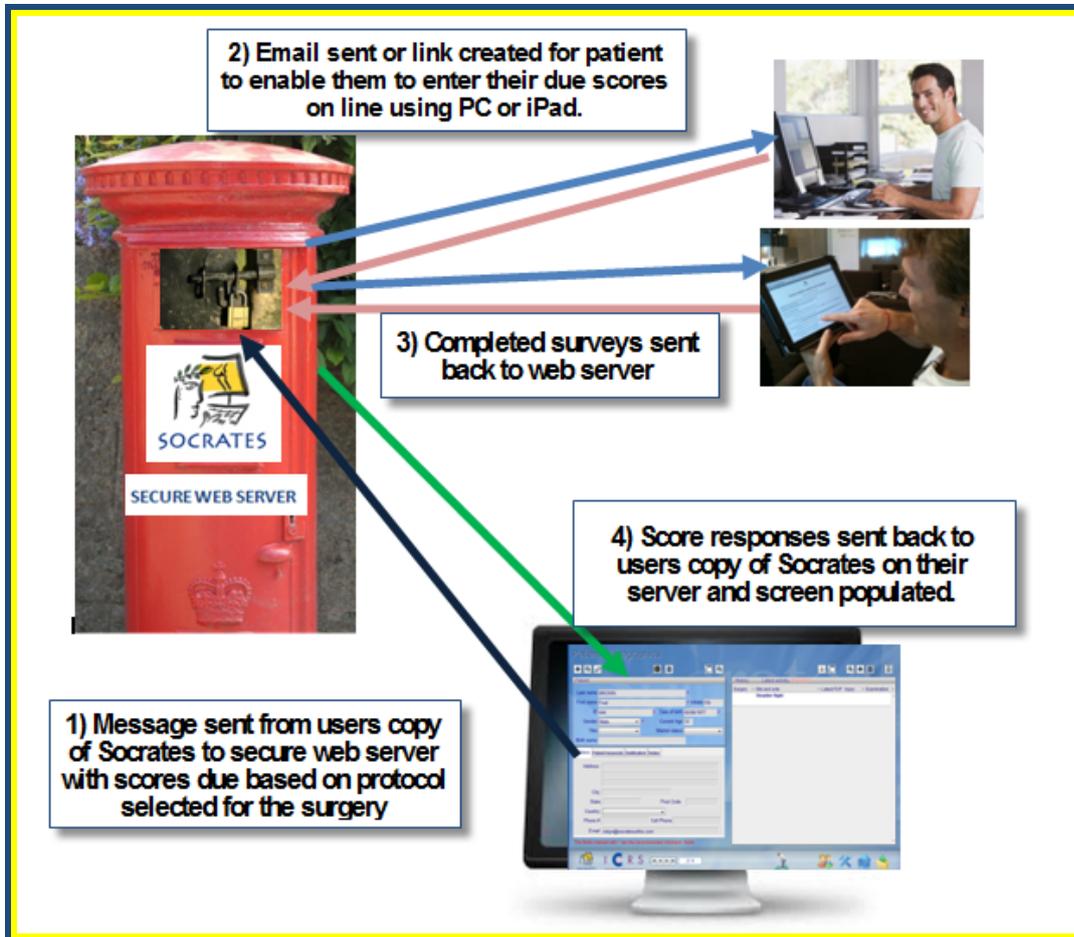
- Sending what's due to the web server and then sent directly to the patient by email.
- Sending what's due to the web server where it will "wait" till the patient comes into the clinic. They can then connect to the web server, a password and ID is then generated from their surgery record so the web server knows who they are and what is due for which surgery. Once they are logged in they would complete the scores that are due online - the same way as the patients would do by email.
- The usual way, either by the patient filling in a paper form and someone in the practice manually entering it, or scanning it in using the scan forms for each score/survey.

All methods can be used for the same patient and surgery. It might be that the patient uses different methods of entering their data over time - maybe a paper form for their first visit, online in the clinic for the next and from then on by email. Socrates can do all this.

Each Socrates site using the web service has a unique user name and password allocated by Socrates Ortho when they are setup as a user of the service. This is effectively the "address" of each user and enables the web server to allocate the patient's scores to that particular user's database. Each patient and their surgery record inside the users Socrates database also has a ID unique to that database. It's like the post office that has the address of the surgery so they know where to deliver it to, then the location of the person at that address (the surgery record) to know where, and who in the house to deliver the scores - which score.

The Socrates database remains on the users own server or computer. The Socrates web server just acts as an electronic mail system to handle the sending of the scores/questionnaires, and the answers the patient submits are retrieved and returned into the user's copy of Socrates. The company which owns Socrates, Socrates Ortho, doesn't store or keep any of the results; you still have complete ownership and control of all your patients' data.

Here is a schematic of how it works.



Data to support online data entry by patients

Electronic data capture by patients has been in use since the 1970's and has become more widely used in clinical trials and assessing outcomes throughout the 90's. There are many papers published demonstrating its equivalence to paper data capture, that it may be more accurate and that patients may prefer it to paper. There are concerns that some patients will have had no experience using a computer or a hand held device, however some publications suggest that this hasn't been a barrier to effective use. In the following study a greater percentage of patients found it easier to use, and preferred it to paper despite some having no experience of using these types of devices or the internet. ¹

"There is an increasing number of reports on computerised outcome instruments and general agreement on the several advantages of the electronic format such as a reduced amount of paper, reduced number of missing items and easier handling, analysis and storage of data."

"Despite the lack of previous computer experience in a considerable number of individuals, most still preferred the computerised format. This supports the high degree of acceptability with electronic questionnaires, independent of age, gender and familiarity with computer technology."

"Finally, the electronic assessment may simplify quality assurance. A recent Californian survey showed that in more than 80% of surgical patients no outcome is measured, and highlighted the importance of systematic

research. The authors concluded that no objective data for consumers and health-care sponsors are available to allow for the quality control of different interventions and different institutions. In a healthcare system in which the competition between different providers is becoming more intense, surgeons are well advised to collect hard data on the efficacy of their treatment. Resources will only be given when both quality and efficacy have been demonstrated. Computerised questionnaires reduce the administrative burden and can therefore help to gather data more easily."

¹ Journal of Bone and Joint Surgery - British Volume, Vol 87-B, Issue 2, 201-204.

A computer touch-screen version of the North American Spine Society outcome assessment instrument for the lumbar spine. S. Schaeren, MD, Orthopaedic Surgeon¹ et al

A meta-analysis of 46 studies evaluating 278 scales concluded ²

"Extensive evidence indicates that paper and computer administered PRO's (patient reported outcomes) are equivalent."

"the use of computerized measures to collect PRO data is likely to grow, because electronic assessment offers many advantages over paper and pencil measures. This growth need not be impeded by concerns about the equivalence of electronic PRO measures to their paper and pencil ancestors."

²Value in Health Volume 11, Number 2 2008. Equivalence of Electronic and Paper-and-Pencil Administration of Patient-Reported Outcome Measures: A Meta-Analytic Review . Chad J. Gwaltney, PhD,1,5 Alan L. Shields, PhD,2,5 Saul Shiffman, PhD3,4,5

We have not done any specific studies to validate the Socrates method of entering scores via the web other than in house testing to check the accuracy of the responses and scoring when the results are returned to Socrates.

Security and Privacy (HIPAA)

The webscore server is hosted by a US company - FireHost www.firehost.com - that provide us with a HIPAA ready (Health Insurance Portability and Accountability Act) and PCI (Payment Card Industry) secure, hosting environment. This is the highest level of security possible. A separate technical document is available to explain the back-end and server specifications. The majority of issues relating to data security and HIPAA compliance apply to the database itself which is still stored with the end user, not Socrates Ortho. It uses standard HTTPS protocols and ports, and doesn't normally require any changes to firewall settings.

It is important to note that only minimal PHI (personal health information) is on the Socrates webscores server - the patient's first and last name and their email address if email is selected as the method for the patient to enter their data. If email isn't selected only the first and last name is stored on the server. The responses to the scores pass through as numbers; the scores are calculated in the user's copy of Socrates once the responses have been sent back from the web server. The PHI details are also encrypted according to the recommended standard using 256 bit encryption. HIPAA also does not consider properly encrypted data that is "unaccounted for" (stolen, lost, hacked) to be unsecured. Each surgery record generates a unique ID and password which is used to access any scores on the web server due for completion. If email is the method selected this unique link is sent which will automatically log the patient in. Each site using this service has a unique user name and password to enable the records from their database to be sent to and from the web server from their copy of Socrates. So, the bottom line is that it's all very secure.

Patient Consent

There are 2 issues relevant to consent, that of consent to collect the data, and then the method used. You may be required to have the patient's consent regardless of the method used to complete the scores/surveys. The regulations differ between countries but in general it is a good idea to obtain the patient's written consent to collect data regardless of whether you are legally required to do so. You may be required to have your local IRB or ethics committee approval even if it's just for routine follow up and you are not changing the standard of care. Also, down the track if you want to publish your results you will need to have both IRB and patient's consent so we recommend that you do both when you start the process, or soon after.

Gaining consent relating to using the email method is also a good idea - it ensures that you have a record of the patient's approval to use this method and that the email is not sent unsolicited. However, providing the patient gave you their email address this usually implies permission for them to receive emails from you.

What's installed on your Socrates computer

The web score service takes up no extra space on your server. The answers to the questions, or the position the patient places the slider, travels through our web server and the scores are calculated and stored in Socrates in just the same way as if the answer was entered manually or using scan forms. Some Java script components are added to the installation of Socrates - these are added automatically as part of the installation process.

Otherwise nothing in addition to the standard Socrates program is installed on the user's machine or server. The Socrates database may be stored on a local machine or on a server, depending on the user's preferences and whether it is set up for multi user access. This doesn't change whether the user is using the webscore service or not. A separate technical document is available if your IT or Ethics committee wants to see the technology behind the web services. One computer needs to be allocated as the main workstation, and this obviously needs to be connected to the internet to be able to send out what's due. The frequency of sending them out is set up on this machine in the local settings.

Language

At this stage all the webscores are only in English.

What's installed on the iPad's or clinic computer for patient access?

These smart devices only need to be able to connect to the internet to access the Socrates web server address using one of the browsers below. Nothing else needs to be installed on these devices or computers. Socrates is not installed on these computers or tablets. They do not communicate directly with your copy of Socrates.

Browsers

The web service has been tested on Internet Explorer 10 +, Firefox 9, Goggle Chrome, Safari and iPad 1 and 2. If your patients are having trouble viewing the link or the text on the screen, chances are they are using an old version of their browser which isn't supported. They can upgrade their browser via the web for free. They may also need to clear the cache or browsing history if some of the icons are not visible, or they can't be clicked on. Sometimes we may make a change to the screen display, change font and colours, etc and these may not be visible until the old browsing history is cleared.

Smart phones

The scores can be completed on a smart phone, although the screens are obviously small. Note that some of the scores with a lot of questions may take a lot of scrolling on a phone to get to the end.

Equipment needed

The clinic

The computer where the main Socrates database is installed will need to be connected to the internet to be able to send and receive the messages with the scores that are due and completed, to and from the web server. It doesn't have to be on and connected to the net at all times, but it can only send and receive the "mail" when Socrates is open and that machine is connected to the internet. It's best not to have a wireless connection as they can be unreliable. If you have Socrates on several computers on a network **ONLY ONE** of them would be designated as the main one for web scores, and the settings as to when to send and receive the scores due are set up on this machine. If you have elected that some patients will complete their scores online in the clinic you will also need to have either a computer, or a tablet device such as an iPad, available and connected to the internet which patients can use to access the web site of the Socrates web server. This computer **would not** normally be the same computer that the Socrates database is installed on. You will need to set up an email address and sender name to give us for the patients who are receiving email with their scores to receive the links from - its best to have a dedicated email address for this and to pick one that easily identifies you to the patient.

You will also need to register with Socrates Ortho as a user of this service. Once this is done you will be sent a user ID and password which is your "address" so the web server knows where to send and receive your scores. See later in this chapter for how to set this up. There is an additional annual charge for the web score service over and above the annual maintenance fee for Socrates.

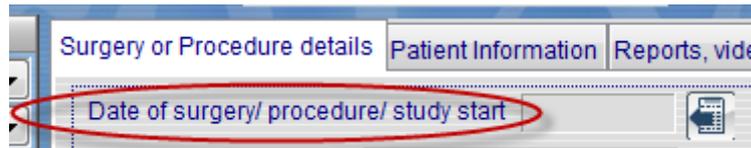
The patient

The patient will need to have an email address and be able to access their emails if that is the method selected for them, or they will need to be able to access the internet in the clinic to log in to the Socrates web server to access their scores. They will not be logging into the main Socrates database on the machine where Socrates is installed. If they are not accustomed to using computers they may need some tuition and supervision or you may have to use paper forms.

Non-surgical procedures, or conservative treatment

The webscores can be used for patients who do not undergo surgery. They may have had a non-operative procedure such as intra articular injection, or are being followed up after an injury with conservative treatment only.

It's important to note that for most of the user manual we talk about date of surgery and pre-op and post-op time points. In fact this date can be a date which indicates the start of a treatment, or study, and the time points are pre and post the start of the therapy or follow up - it doesn't need to be a surgery. The program is set up in such a way that it needs a baseline date in order to measure progress over time, and then to calculate when the post-surgery or treatment visits are to take place. These are based on a time point after a starting date, i.e. 6 months post-surgery, start of the study, injection of steroids, or just following the outcome of the natural history of an injury.



Note: At this stage the webscores can only be sent out **once for a pre time point** if using the protocol method. After that has been completed it will wait for a date to appear in Date of surgery/procedure before it will send out anything further. Thus if you are following a patient for an injury without surgery – say a rotator cuff tear with physio only - you would still need to enter a start date to initiate the next score at the next time point, which might be 3 months later.

If there is a need to have more than one pre time point score, you can use the manual send to re-send a pre-op score or enter them from a scannable form. It is sometimes useful to have more than one pre treatment score if the patient has been on the waiting list for some time, or has been undergoing conservative therapy to find if they improved or not over the period. If there is more than one pre-op score sent using the manual web scores they will be all stored as just pre-op but all the pre-op scores can be exported and will have the actual date that the different pre-ops were entered.

We recommend using some method of categorising the non surgical patients so they can be easily identified for follow up. This can be done in several ways. See the Data Entry chapter for ways of classifying these.

Web Interface

Considerable thought was given to the interface presented to the patient. It was decided to use the scroll down method rather than one screen for each question. It is more similar to the paper based method, and it enables the patients to see their previous answers more easily. Research has shown that patients may refer back to previous answers when responding to other questions later in the surveys. The other option with one question per screen would have made returning to a previous question difficult since the patient would have to click back on each screen to find the previous answer. Some surveys have 40+ questions and we felt this would take too much time and lead to frustration.

GETTING STARTED

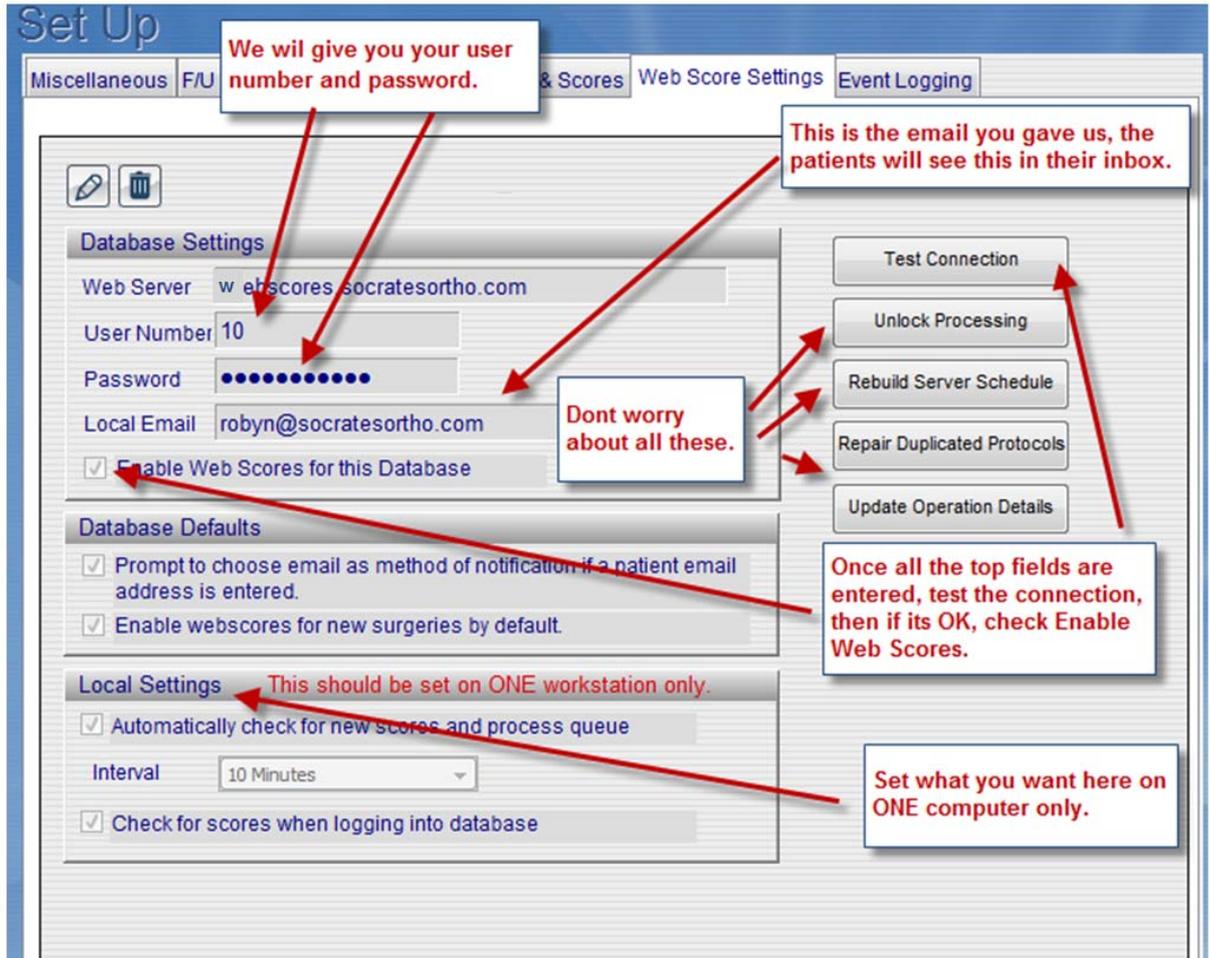
There are 4 basic things you need to do to get it all working

- 1) Setting up as a User. You will need to contact Socrates Ortho to get set up as a user and provide them with an email address and sender name which will appear in the "from" line on the email header for those patients receiving emails.
- 2) Select the method on each patient's record how they will access their online scores - either by email or in the clinic – local entry.
- 3) Set up protocols if you are using this method (the scores you want at which time points) and allocate one to each surgery record which will be sending and receiving webscores.
- 4) Enable the webscores for each surgery record that you want use the web scores if using the protocol method.

Web Score Settings

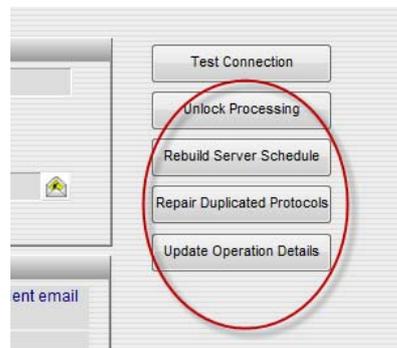
These settings are on the Set Up screen, the last tab. We will have sent you your ID and password. Make sure these are set up correctly on the MAIN computer ONLY, which is connected to the internet, and you have tested the connection. You also need to have selected the time intervals you want the web scores to be sent and collected. Go to the Set Up screen, *Web Scores Settings* - to access these settings. You can change the *Local Settings* at any time by selecting modify and making the change. The local settings should only be set up on the one main machine.

Note: Don't change the Database settings in the top table, or your service will no longer function. If you change your email address you must let us know so we can change the settings on the web server.



NOTE: Only ONE computer should be set up to send and receive automatically.

Don't do anything with these functions, if we need you to we will let you know what needs to be done. .



Senders email address

An email address is needed for each user site (that's you) using the web scores.

This is the email address the patients will see in the "from" field in Outlook – see below. Note that it's possible to reply to this address also. This wouldn't normally happen, the patient would just click on the link but if they did decide to send a message back it would come back to that address. We also need you to choose the senders name (you) In the screen shot below we have Dr Harry Hipbone. So even though the emails don't actually come from your own email set up, Outlook or the equivalent, to the patient it appears that they are coming from your account.

If you don't want the patients to be able to reply to the email link we suggest you set up a do not reply address such as noreply@DRBLOGGSORTHO.com

We recommend that you set up a separate email address and sender name for this purpose which is meaningful to the patients. Examples are Dr Bill Bloggs DrBloggsortho@gmail.com UniversityofGrenada@grenada.com

The email will be delivered to the patient's email from this email address. In the example, the users name was Dr Harry Hipbone and the email address drhipbone@hipbones.com - that's what the patient will see on their email. Note that when we ask you for the email address and name you want assigned to that email address, the **name** you give us will be the one that the user sees as the sender of the email.

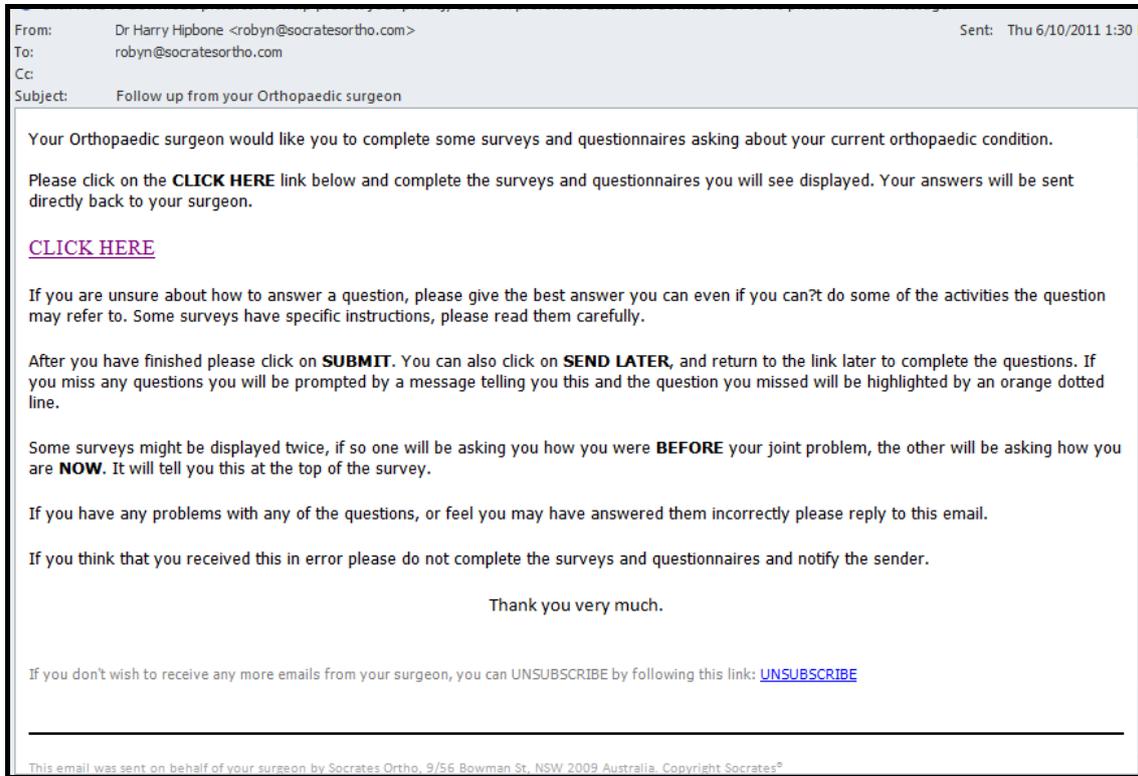
The email header will display as below.



Email message

The default email message is a generic one that is not specific to your site other than seeing the from name and email address as above. It is possible after Version 10073 to have your own email message, add your own logs etc. Contact us for details about what's involved to set this up.

When the patients click on the default email they will see this message displayed:



When the patient clicks on the link, they will see this screen with the scores/questionnaires listed. The message will tell the patient how many there are to complete, and ask them to complete them all.



BENDER, Greg

Please click on the questionnaires in the list below. They relate to your **RIGHT Knee**.

There are 3 surveys for you to complete. Please answer all the surveys listed below until you see a message saying there are no more to left complete.

Questionnaire Name	Please complete by
Knee Society Score	Thu, Mar 8, 2012
Oxford Knee Score	Thu, Mar 8, 2012
VAS Pain Score	Thu, Mar 8, 2012

This is a screen shot of a part of a score that the patient will fill in. The icons are large and easy to click on.

▶ 1. How much sharp pain do you experience in your shoulder?

NO PAIN EXTREME PAIN

▶ 2. How much constant, nagging pain do you experience in your shoulder?

NO PAIN EXTREME PAIN

SOCRATES ORTHOPAEDIC OUTCOMES

Oxford Hip Score

Please answer the 12 questions below. During the **PAST 4 WEEKS...**

▶ How would you describe the pain you usually have in your hip?

None

Very mild

Mild

Moderate

Severe

▶ Have you had any trouble washing and drying yourself (all over) because of your hip?

No trouble at all

Very little trouble

Moderate trouble

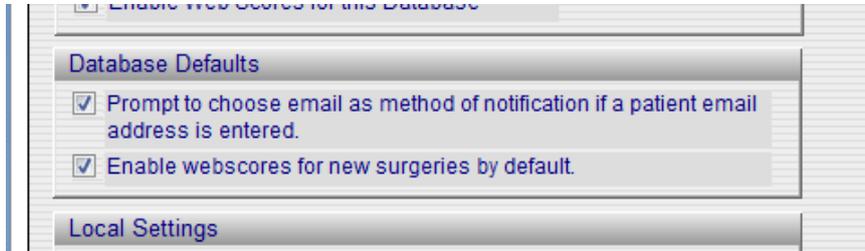
Extreme difficulty

Impossible to do

Defaults

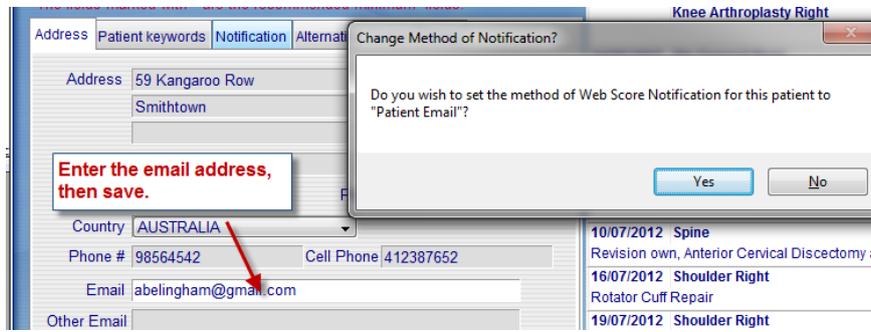
You have choices in the web score settings to select the following as defaults.

These options save you some clicks, and prevent omissions if you are using the web scores for most of your patients. They can always be unchecked for individual records if they don't apply.

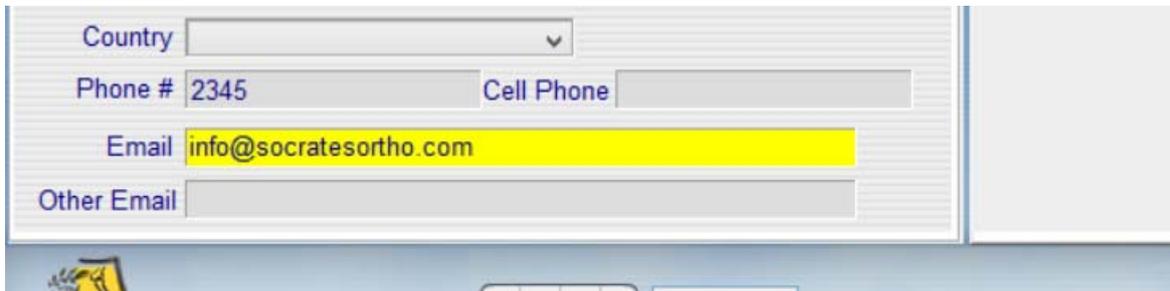


Prompt for email address.

If this is checked, each time an email address is entered and the page is saved, or tab to the next field this message will display. If Yes is selected there is no need to go to the notification tab to select the method.



The email field will then be highlighted in yellow which indicates that this is how the patients will receive their scores.

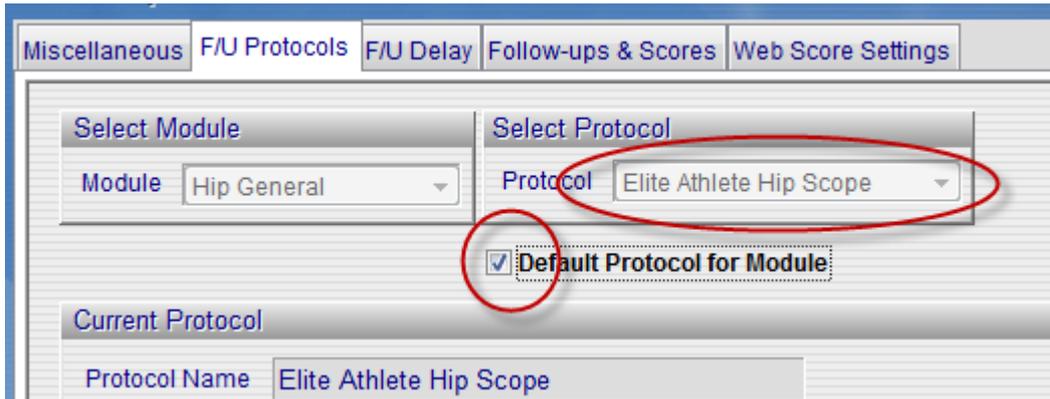


Enable web scores by default

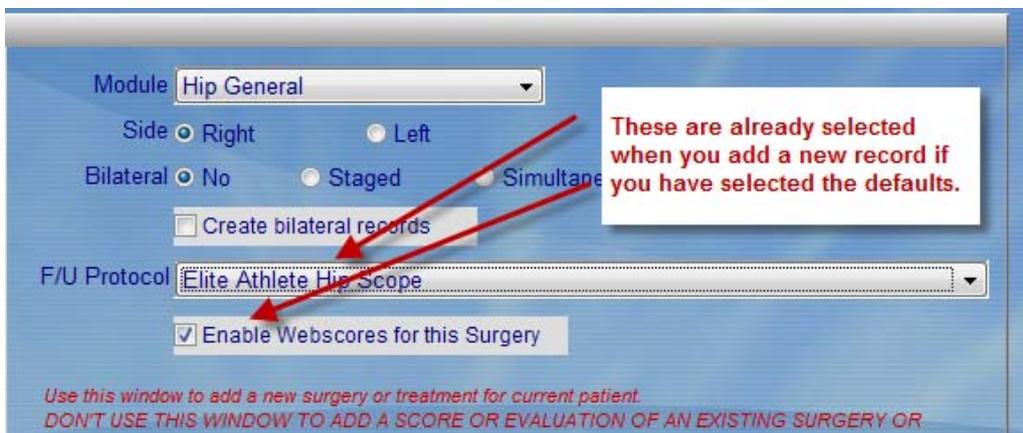
If this is selected by default in the settings, when a new record is set up web scores will automatically be enabled.



Assign default protocol



On the Protocol set up screen you can select one protocol from each module to be the default protocol. If this is checked in the web score settings, each time a record is added to that module, it will be assigned this protocol. It can be changed for an individual record if you want to use a different protocol.



If you select all 3 of the defaults what this means is that when you set up a new record, all 3 will be selected automatically. Once the email address is added, it will automatically be selected as the notification method if you say Yes when you save the window, and the default protocol and web enabled flags will be already set.

Selecting the method of patient entry

The user needs to choose the method of completion of the webscores for each patient. There are 2 choices.

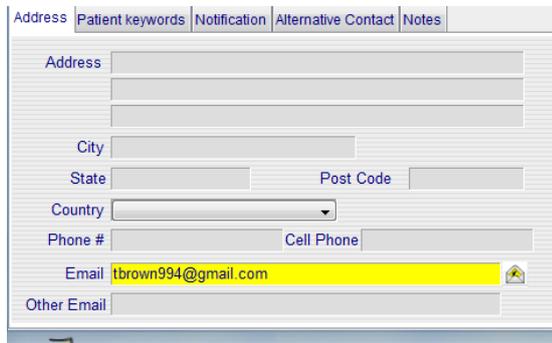
- 1) Sending a link to the patient by email.
- 2) Storing the scores due on the web server until the patient comes in to the clinic. They would then log in from the clinic and complete their scores on line via an iPad, tablet to computer supplied by your site.

In both these cases the scores are sent to the web server in the same way, the email is just an extra step where the web server forwards the link to the patient's email address if this is what has been selected for that surgery. It's a bit like using the post office; the mail is first delivered to the post office (our web server) from your copy of Socrates. Then it's either stored in a post box and opened when the patient comes in with their "key" and unlocks their box (entering their user name and password or scanning the QR BAR code) or it will then go from the post office into their own letter box at home (email). You can also mix it up, even if the email method is selected if the patient is in the clinic at the time you want them to fill it out, they can fill them in while they are there. If they have filled it out in the clinic and the email has already been sent when they click on the link on their email it will show that all scores have been completed.

The chosen method is selected on the patient demographic screen on the Notification tab. There are 3 choices:



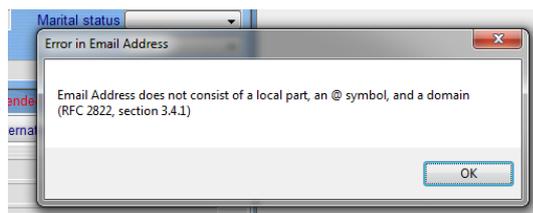
- Using email - If the patient has an email entered on the main address section this email address will also be populated to the patient email field. If email is the method selected it will be highlighted in yellow on the front screen. If you select the default message in the web score settings it will ask if you want to set the notification when the email address is added as soon as you save the screen – there's no need to go to the notification tab. Note that if the patient unsubscribes, or the email bounces this will automatically be unset, and no longer yellow.



- An alternative, or other email address, can be used if you want the patients scores/surveys sent to a 3rd party - maybe a relative who has a computer and can help the patient, or a physio who might be in a clinic helping patients to fill them out. The email selected as the method of notification will be highlighted in yellow. If you the email address or the method is changed the next time Socrates sends mail to the server it will change the email address or details for all future scores.

3)

If the email address is missing some aspect which it needs to be a valid email address you will see this message.



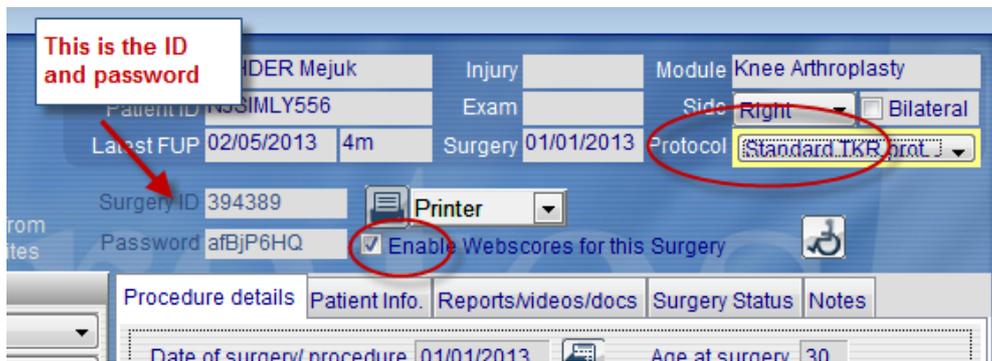
- Don't send via email. The scores/surveys which are due will be sent to the web server if the surgery is web enabled, and will be available to complete by logging into the Socrates web server in the clinic or office using the ID and password or scanning the QR BAR code generated for each record.

Note: even if you haven't selected a method here you will still be able to fill the scores in the clinic if the surgery/record is web enabled as by default, "Don't Send by email" is selected. You will not be able to send an email to the patient, but the onsite local entry will still be able to be used even if nothing is selected here.

Once you have set this up the system knows the method for sending the webscores – but nothing will happen until the following is done.

- A surgery or record is set up and then web enabled for webscores.
- A protocol is assigned to the surgery record, or a manual score selected.

Once webscores are enabled, and a protocol assigned, it's ready to go. If pre-op or pre injury scores are in the protocol they will be sent out immediately. When a date of surgery or treatment is entered, the post-op scores will be sent out at the points time selected in the protocol. Manual scores are sent out immediately. The ID and password is assigned as soon as the scores is sent to the web server however, **you have to leave and return to refresh the screen to see it the first time.**



Existing patients/surgeries

If there are already surgeries for patients set up before the webscores version was installed and some scores have already been entered using forms in the past, the webscores will take over sending any due in the future if the enable web score box is checked, and the protocol is assigned. Or, you can use the manual method to send any score/s to any of the existing patients. For example, you have a patient with an existing surgery and you have now assigned this existing surgery a protocol with pre-op, 6 months, 2 years and 5 years scores selected. You have just now selected this existing surgery as web enabled but they have already had their pre-op and 6 month scores entered using paper forms. The system will automatically send out the next score/s due at the 2 year time point even though they weren't originally in a protocol, and the surgery was set up in Socrates before the webscores were available. But this will only happen if the enable web scores box is checked, a protocol is assigned to those existing surgeries, and you have set the patient up for email if that's the method you want for that patient. You can also assign protocols to existing surgeries which don't have protocols as a group rather than having to do them one at a time. This is done by using the search function to select the records that you want assigned to which protocol, see the section on protocols for more details.

Email method

Once the email address has been entered, webscores enabled, a protocol assigned, or manual score selected for each surgery record, it's ready to go. If pre-op or pre injury scores are in the protocol they will be sent out immediately, then thereafter at the intervals selected for the protocol once a date of surgery or the start of the study/treatment is entered.

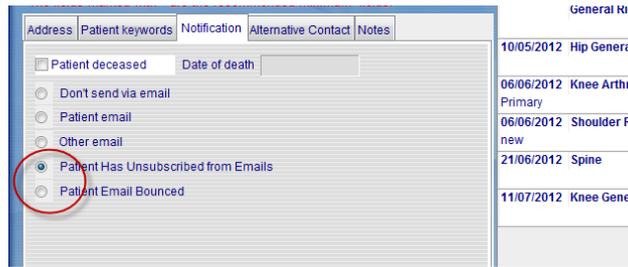
Bounced or unsubscribed email addresses

There is an unsubscribe option on the body of the email.

If you don't wish to receive any more emails from your surgeon, you can UNSUBSCRIBE by following this link: [UNSUBSCRIBE](#)

This email was sent on behalf of your surgeon by Socrates Ortho, 9/56 Bowman St, NSW 2009 Australia. Copyright Socrates®

Socrates will automatically remove the patient from the web server database list and the unsubscribe option on the notification tab will automatically be checked when the computer next receives messages from the web server. No further emails will be sent out.



If the email address is incorrect and is bounced, the details will also appear on the same bounced/unsubscribed email report. You can use the search function to search for the patient who has the bounced email address by searching for the email address.



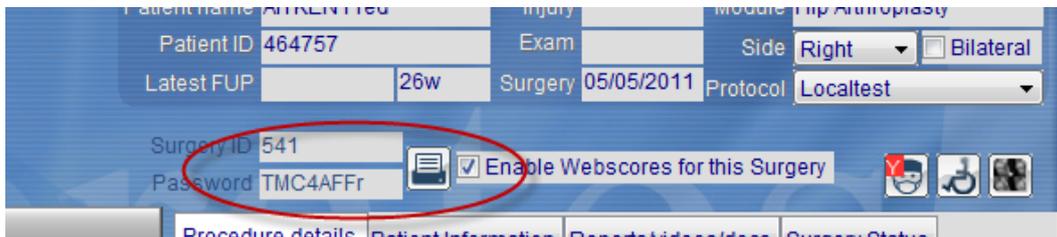
If it's wrongly formatted, a comma instead of a full stop, no @ etc. it will not be sent and you will a message when you add the email address.

For the unsubscribe option if the site contacts the patient and they agreed to be resubscribed the user can then check one of the notification method options again to resubscribe them. The system will then take over sending emails again.

Care should be taken to ensure that the email address is correct - if it is sent to another person's email address they would be able to click on the link and enter the responses into the Socrates record. It is likely that if this occurred (the email address was incorrect) the recipient would notify the sender that it was incorrect but users should be aware of this if errors are made. This would be the same as if the forms were sent by mail to the wrong address, and completed by the wrong person and returned to the site.

Email deleted by patient

If a patient deletes the email for whatever reason before clicking on the link there are two options. If it's the first one they receive they can just wait for the reminder email to come at the half way point that it is due. If it's the second one, or it needs to be completed right away you can email the patient the web server link <https://webscores.socratesortho.com> and their ID and password which you can obtain from the surgery screen. The password is case sensitive.



Changing email address

A new email address can be changed in the notification tab on the patient's demographic screen, the next time Socrates communicates with the web server this will be changed. It is the user's responsibility to keep the patient's email addresses up to date.

Timing of emails

The sending of emails is a two-step process. First the details are sent to the Socrates web server. Once on the web server, the emails are stored there and then sent out to patients in a batch every 10-30 minutes. It's like the postman picking up the mail and then making deliveries every 10-30 minutes

Changing details in a protocol

If you change the protocol for any reason, that's add a new score, or change a time point all these records will need to be sent to the web server again. Thus if you had 500 records in that protocol the next time Socrates communicates with the web server you will see a message "sending 1/500" etc.

COMPLETING THE SCORES IN THE CLINIC.

Some patients don't have an email address or won't manage to use a computer unassisted. Some clinicians also prefer to have their patients completing their scores where they can ask for assistance and can be supervised. In this case users can elect to have the scores completed in the clinic/office providing there is an internet connection and a computer or tablet available. On the patient notification tab you would usually have selected "Don't send email". In this case, assuming that the surgery has been web enabled and a protocol selected, or the manual send used the scores due are sent to the Socrates web server in the same way as the email method - they are just not sent out to an email address but will "wait" in the system for the patients to log in and complete them. It's the difference between sending the forms to the patients by mail (using the email method) or going to the post office to collect the mail from your own mail box – using the onsite method which is logging in directly to the Socrates web server from the clinic.



You can also mix and match - see more about this later in this document. There are two methods in the clinic for allowing patients to access their due scores.

Using the QR BAR code

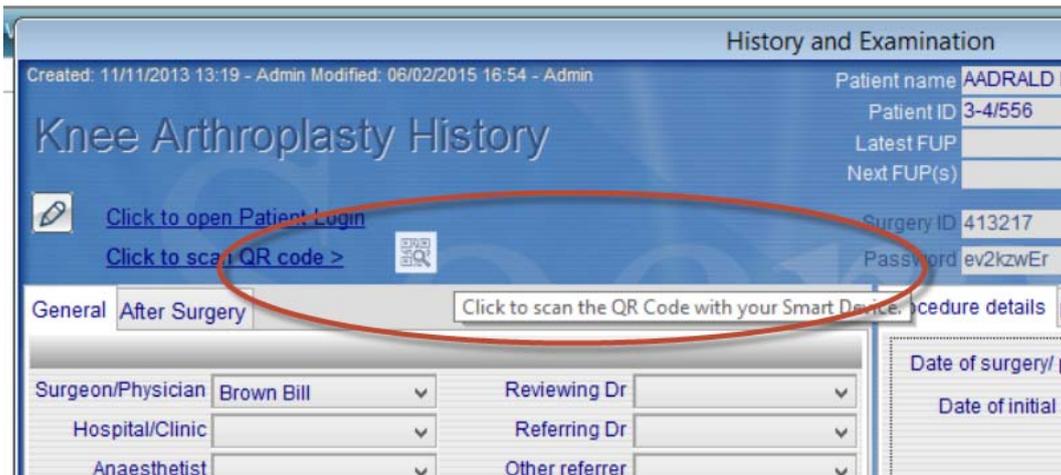
You can use a free app which can read a QR BAR code to locate the unique link to the patient scores. One of these is stored in Socrates for each record. These QR BAR codes are unique, and are the same as the unique ID and password, they will take you directly to the patient's link on the server in the same way as entering the ID and password. It's just a faster and easier way of accessing the unique link for that surgery. To use this feature you will need to download any of the free bar code scanner Apps which can read these codes on the iPad or tablets that you use in the clinic. An example is www.redlaser.com

Once the App is downloaded, click on scan and it will take a picture of the QR BAR code, then take you to the link.

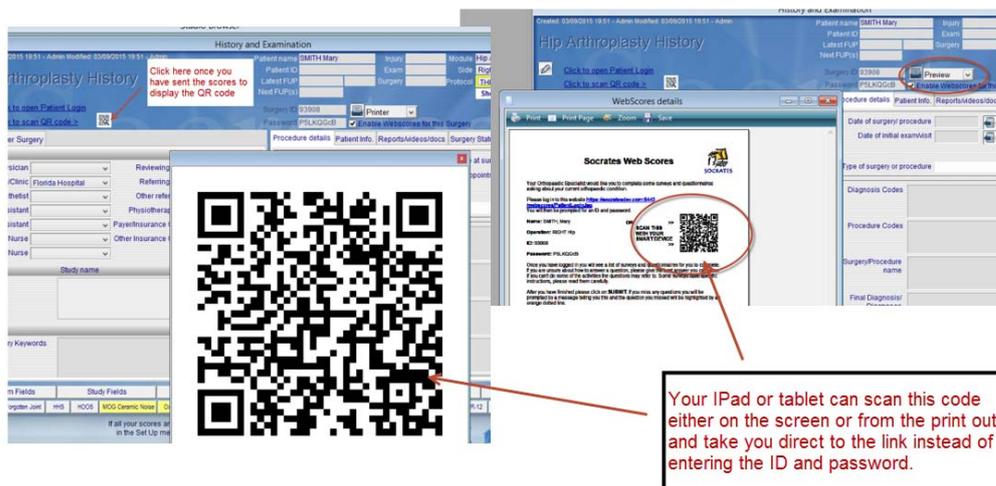
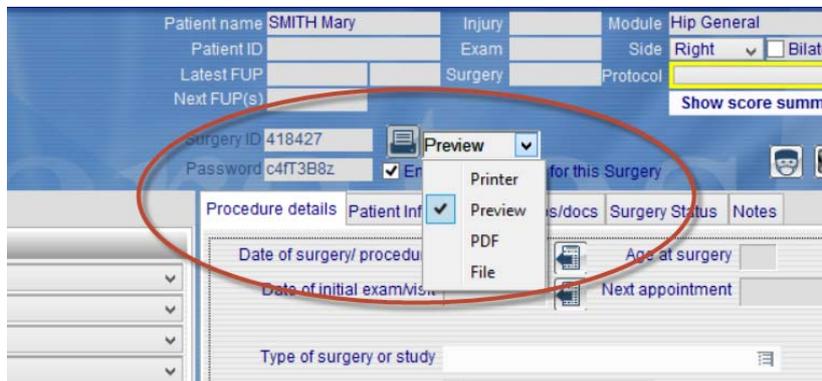
The device can either read the QR BAR code direct from the image on the Socrates screen, or from the print out that has the ID and password, and the new QR BAR code on it.

Once you have downloaded the App you have 2 options to access the QR BAR code. Both are on the patient history screen for the record or surgery that you are entering the scores for.

- 1) On the left hand side you can click in the QR BAR scan icon. The QR BAR code will be displayed, just open your bar scan App, point it towards the black QR BAR square and click scan. It may ask you to click OK to take you to the link. The patient will then see the scores they are due to complete displayed.



- 2) The other print is to print out the details which includes the QR BAR code, or you can preview it and scan the preview. Open your bar scan App on your iPad or tablet, point it towards the black QR BAR square on the form or the preview screen and click scan It will then take you directly to the link with the patient scores that are due to be completed.



Note that the score must have been sent to the server for this to function. If you can't see a ID and password, you won't be able to see the QR code.

Using the ID and password

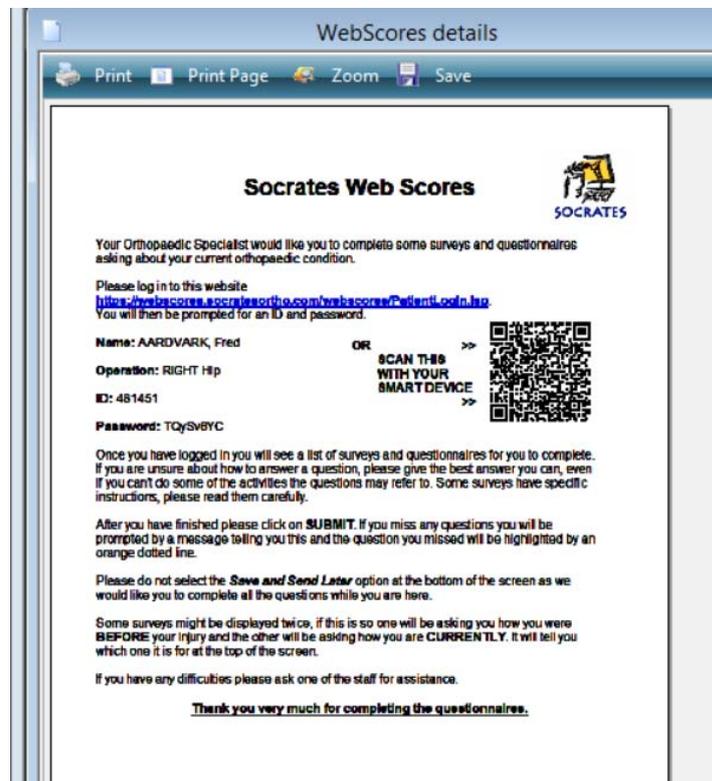
If the score has already been sent to the web server the ID and password, and a document with the details of the ID and password will be available. If the score hasn't yet been sent to the web server you need to send and receive, then refresh the screen to be able to view the ID, password and the print icon from then on. Print this out for the patient or staff member if they are helping the patient to log in.



You can print the document for the patient or just you can just write these down if that's easier. These **don't change** for the duration of the follow ups for **that surgery**. There is also a report on the report screen where you can generate a list of all ID's and password.



Here's what the print out looks like.



If you can't see the ID, password and print icon it means that the surgery record hasn't yet been submitted to the web server so it can't assign an ID or print the details, or else the screen hasn't been refreshed (exit and then go back) Other things to check if you still can't see the ID and password are that the surgery is web enabled a protocol is selected, and the status is ongoing.

Log into the web server address <https://webscores.socratesortho.com/webscores/PatientLogin.jsp> from a computer or an iPad type device - whatever the user prefers or has available. The site would normally have bookmarked the web address so the patient would just click on the link and will see the screen asking for the ID and password.

Then enter the ID and password and click submit; *it is case sensitive*. If either the ID or the password is wrong, an error message will be displayed.

Authentication failure: Operation Id Incorrect

If you have a large number of patients coming in to the clinic due to enter scores online, it may be a good idea to print out their ID's and passwords in advance. Make a list of who is due in, then go to the individual surgeries in Socrates and print out the page with their log in details. This can be done several days in advance if need be. You can then give them the page with their details when they arrive and send them to the PC or iPad to complete the scores.

The patient will see the scores listed the same as if they received them via email.



BENDER, Greg

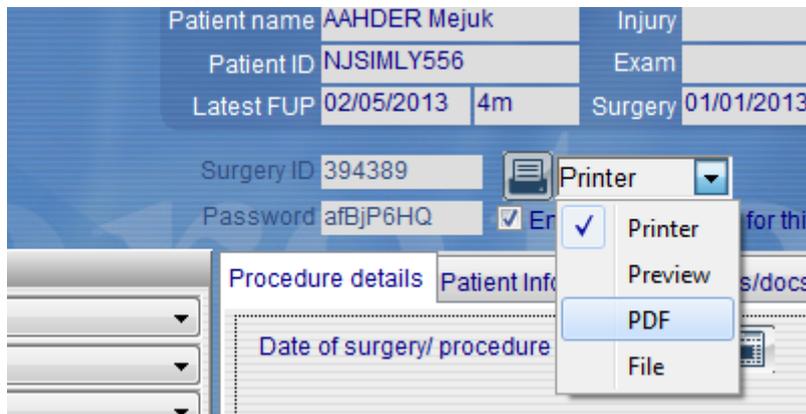
Please click on the questionnaires in the list below. They relate to your RIGHT Knee.

There are 3 surveys for you to complete. Please answer all the surveys listed below until you see a message saying there are no more to left complete.

Questionnaire Name	Please complete by
Knee Society Score	Thu, Mar 8, 2012
Oxford Knee Score	Thu, Mar 8, 2012
VAS Pain Score	Thu, Mar 8, 2012

Saving the web score print out

There are times when it may be necessary to email the password and ID details to a patient or another person who may be helping the patient. Or, your secretary may be in another clinic without access to Socrates, and needs to have these details for the patients coming in to the clinic that day. The print icon has several options, print, print preview, save as a pdf, or save to File (as a text which can be opened in excel)



Date entered

For the web scores the actual date the score was entered is not displayed in the evaluation date window on the score screens. The follow up delay selected in the protocol will be populated for that score into the F/U window. The evaluation date in this window is used when filling it in by hand to calculate the exact follow up. For the web scores, if using the protocol method users have elected to choose the follow up period, and providing it is completed within the window of time that it is valid it will show up in the F/U field as that follow up. The date it was submitted is recorded as the input date. If using a manual score the follow is calculated on the current date, and the date of surgery.



ID and PASSWORD

The ID is numeric, the password is a combination of numbers and text and is case sensitive. This is necessary to ensure that no-one can accidentally access another patient’s scores. The ID and password is the same for the patient for all their time points for that particular surgery. Thus you could print the page and file it with the patient notes, or EMR, so next time the patient comes in it is available without having to print it out again. HOWEVER if they have a surgery on another side or a different location they will have a different ID and password. All patients that have scores sent to the web server will have an ID and password allocated regardless of where they are receiving their scores by email. No ID and password means that the scores are not on the web server.

Once these details have been entered, the patient will see a link with their name and their scores, the same as the link for the email method. The patient then clicks on the link and completes their scores in the same manner as the email method. The responses will be sent back to your copy of Socrates regularly, the frequency depending on when the program has been set up to receive messages from the web server. You can also check manually any time by clicking “Send and Receive” see more about this later in this chapter.

The interface and scores, and the process of completing the scores is exactly the same as for the email method.

Mixing on site entry and email

It may be that you want to use a combination of methods - the patient might be in the clinic at their pre-op visit and you want them to fill the score out then, and for subsequent time points they will do it by email. If the score is filled out in the clinic before the email is sent time the email won't be sent as the program "sees" that the score at that time point has been completed. If the email has already gone out but the scores were filled in by paper, or on line in the clinic when the patient clicks on the link they will see a message saying that there are no more scores due for completion. The onsite score entry method can be used at any time despite the method selected. You can also mix and match with the paper forms, often the patient might fill in a paper form the first visit, and from then on they use the web service. Note that if they fill them in on paper, these would have to be entered in Socrates otherwise Socrates doesn't know they have been done, and then the patient would receive the email with the preop scores to be completed again.

Time to populate the results into Socrates

Once the answers are filled in and the patient clicks the SUBMIT button, either using the local method or email, the results will be ready to come into your copy of Socrates in less than one minute. When they actually come in to your computer will depend on the interval you have selected for retrieving scores in the setup, or whether you use the instant "Send and Receive" command.

USING THE PROTOCOL METHOD

Score sending schedule

Once a record/surgery is created as long as there is a protocol and they are web enabled the preinjury and preop scores will be sent out. No further scores are then sent out until a surgery or start date is entered. The program will then send the next scores out according to the protocol. A reminder email is sent at the half-way point if they haven't been returned. If you want to have a longer window of time that the scores are available, use months rather than weeks when you select the follow up period in your protocols. If the patient has missed their time point and the score is no longer available on line you can manually reschedule the lapsed time points.

Once the next score is due it will be sent out regardless of whether the patient missed the time point before.

Summary of time point windows due to and from

These details are displayed on the Surgery web protocol window.

How Due Dates are Calculated

Preop

- Date of surgery is today, preop timepoint will be valid for 24 hours from the time it is sent. No reminders.
- Date of surgery in the future, sent out 2 weeks before surgery date, valid up until midnight at the start of the date of surgery. Reminder sent 7 days after the initial email.
- No date of surgery entered, sent out immediately and valid for 14 days. Reminder sent 7 days after the initial email.

Postop

- Follow up in weeks, sent 3 days before exact follow up date and valid for 3 days afterwards. Reminder sent 3 days after the initial email.
- Follow up in months, sent 14 days before exact follow up date and valid for 14 days afterwards. Reminder sent 14 days after initial email.
- Follow up in years (1 year), sent 14 days before exact follow up date and valid for 30 days afterwards. Reminder sent 21 days after initial email.
- Follow up in years (2 + years), sent 1 month before exact follow up date and valid for 2 months afterwards. Reminder sent 6 weeks after initial email.

Manual Schedule

- Sent immediately, valid for 14 days. Reminder sent 7 days after initial email.

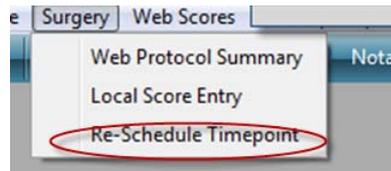
Note - The *Sent At* column is the date that the scheduled score was sent to the webscores server, it is not the date that it was sent to the patient. Scores will be sent when the date in the *Due From* column is reached. The *Date Received* column refers to the date the score were initially retrieved from the web server. If the surgery date has been changed *After* scores have already been received, statistics relating to time taken to return scores for this surgery may no longer be valid.

NOTE: Once the time points have expired, the scores won't be active or available to completed. If the link is clicked on or the ID and password is entered a message "there are no questionnaires due for completion" will be displayed. To resend an expired set of scores use the "Reschedule Timepoint" command on the File menu.

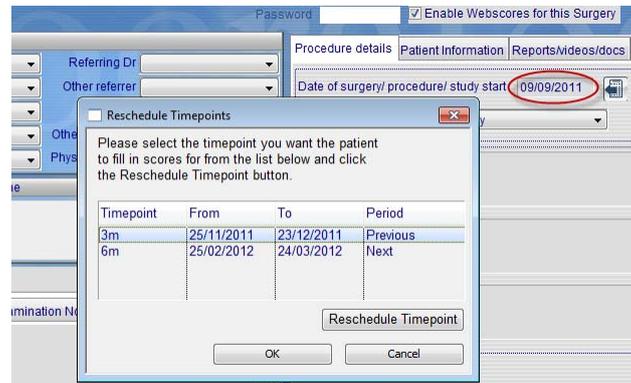
Missed time points - Rescheduling

It's possible that patients will miss their time points for various reasons. If they are on the email method they may have been away when the email and the reminder came in, thought it was spam or they just didn't want to fill it in. After the window of time for completion has expired (see the table above for the days before and after the dates they are available) the scores that were due will no longer be available on the email link or the web server. The patient might also turn up to the clinic early or late for a time point and you decide that you would like them to fill in their next or previous score due while they are there.

Using the Re-schedule Timepoint function enables the user to select either a previous or next due time point if either of these is not in the "current" period – current being still inside the window where their scores can still be completed as above. Let's take an example.



A protocol is set up for a pre-op, 3 month, 6 month and 2 year follow up. The patient completed the pre-op score but not the 3 month one. Surgery was on the 9th September 2011, the current date is the 26th January 2012. The 3 month time point has expired, and the 6 month is not yet due.



If there is nothing visible in this window, it means there are no scores due in the future, or overdue.

Clicking on "Reschedule Timepoint" and selecting which of the Time points you want to be made available will send whatever was due at that time point back to the web server to be available for either on site entry, or an email will be sent out again if they are set up for emails. Thus it might be 2 weeks before the 6 month score is due, the web service wouldn't be sending that for another week. You can select the 6 month time point, reschedule it and it will be sent to the web server and available for completion on line early. But, note that the time point **will still come in as 6 months**, if you wanted to change that to reflect the exact date or accurate follow up you would need to go to that score entry and modify it with the date or exact delay.

If the score that is either overdue, or is due in the future is not close to the current date/follow up, you can consider sending a manual score rather than the reschedule. This will calculate the exact time point based on the current date, and the date of surgery rather than using the original ones from the protocol.

Changes to time points if rescheduled.

Pre-op scores which are rescheduled if they haven't been completed will be valid until the date of surgery if one is entered, or for 2 weeks from when they are rescheduled.

Past time points will be valid for 2 weeks Future time points until the last date the score is due.

Missing responses

Patients can miss answering some of the questions but when they click on the submit icon they will be prompted to return to the missing questions. These are outlined with a red dotted line. However, if they still choose not to answer the question they will be able to click the submit icon. Most scores do allow the patients the option of missing questions if the patients choose for whatever reason not to answer them. When the responses are returned to the user's Socrates database they are dealt with by the algorithms provided by the webscore authors. Depending on the score and number of missing responses some will calculate a score; others will record the answers but with no score. This is the same whether the data is entered manually, by a scannable form, or using the web service.

▶ Do you require help to walk outside of your house, into the community?

- No
- Yes, a cane
- Yes, crutches
- Yes, a walker
- Yes, I use a wheelchair

▶ 26. Since they started, have your NEUROLOGICAL symptoms?

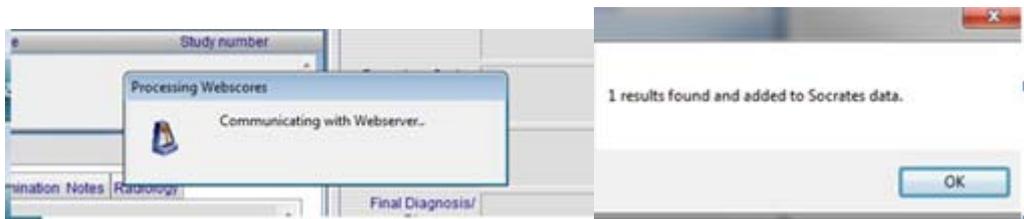
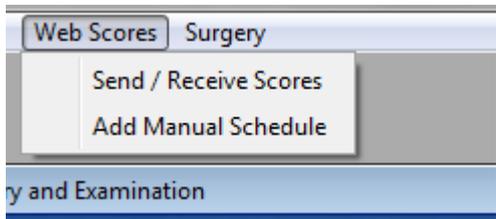
- Progressed (got worse)
- Remained the same
- Improved

When the scores are sent out

The webscores due to go out can be sent out at intervals selected by the user on the set up screen. They can also be sent and received manually at any time by going to the dropdown menu “Webscores” at the top of the screen and selecting Send and Receive.

Sending and Receiving on demand

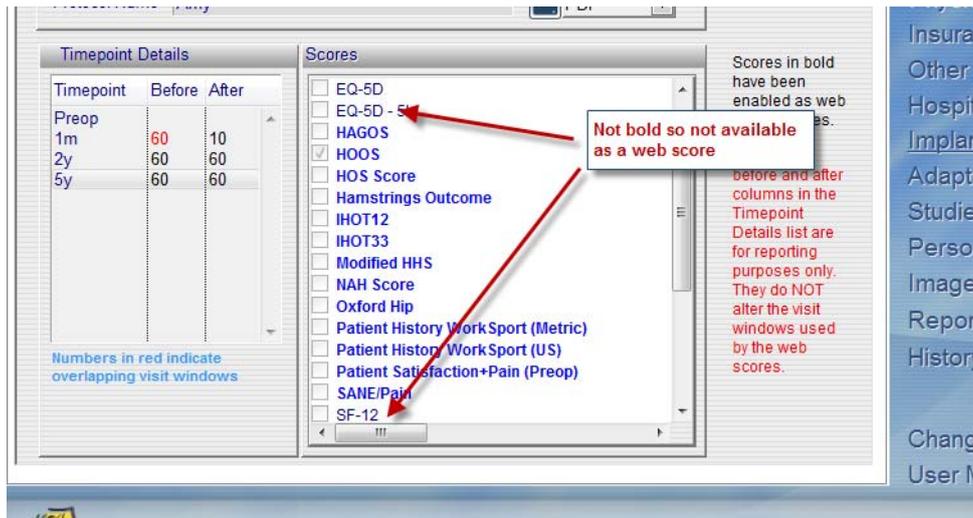
By selecting *Send/Receive Score* from the Web Scores list on the top menu bar you can send and receive any scores due to go to the web server right away rather than waiting for the next scheduled time for the program to send them out. Once you have selected this function you will see a message telling you that it is communicating with the web server. The number of results sent back will also be displayed.



Which scores are web enabled

Most of the commonly used patient clinical outcome scores are available as a webscore, and are displayed in the Protocols list on the Set Up screen for each module in Socrates – those in bold have been enabled as webscores. Some scores are surgeon generated, or are not suitable for adapting to the web system. Some may have been added in the most recent release and are not yet set up as a webscore - they will be added in subsequent updates. Some of the licensors of the scores wont allow us to have their scores used via the web, the EQ5D scores for example.

The full list of scores which are web enabled is at the end of this document.



Some scores are only relevant post op. Other scores, like the patient history, are only relevant pre-op. Users should take time when setting up protocols and selecting scores and time points since they may end up being allocated to thousands of surgeries over the years. The program has been set so that those that don't make sense at certain time points won't be available, i.e. at the pre-op time point the patient satisfaction without the post-op surgery questions is the only one that can be selected, and the patient history is not selectable at the post-op time points.

Managing the work flow

Users will need to decide how best to manage this process from a work flow perspective. If you are only following up selected patients/surgeries, the first time the patients are seen you may not know if they are to be a Socrates patient or what protocol or surveys they would need. They may not even have a record created in Socrates at this point.

Once you know if they are to be followed up in Socrates, you then need to know what protocol to allocate them to, or to set up a new protocol if need be.

If only selected patients are being followed, you could set up a system where you give the surgeon a list of all the protocols that have been set up for their practice, and once they have seen the patient, they select what protocol they want for that surgery on a patient by patient basis. The patient would then need to be entered into Socrates, the protocol selected and "enable webscores" checked and the method (email or not).

If they were having their treatment or surgery soon after that visit, they could fill out their pre-op scores in the clinic while they were there, either on a paper form or via the web. This can be done before or after they see the physician, depending on whether they have already have an existing record in Socrates and a protocol selected. If they have enough time before their scheduled surgery, users can explain to patients that they would be receiving an email in the next day or so with their scores to be completed before they have their treatment/surgery.

If the patient was checked to receive emails but doesn't have enough time before the surgery or treatment (maybe it's a procedure that is being done straight after the first visit - like a steroid injection) you can elect to log in to the web server for that patient's pre-op surveys or use a paper form. Even if the email had already been sent out to the patient they would receive the message that there were no more questionnaires due when they clicked on the link in their email. If you were using a form it would need to have been entered into Socrates for the program to "know" that the time point had been entered otherwise the web server would send out another pre-op web score.

PROTOCOLS

These are very important; without them nothing will happen automatically.

In order for the system to “know” what scores and questionnaires the patient is to complete, and send them out automatically at the correct time points, it is necessary for Socrates users to establish follow up regimes or groups for the different surgeries and patients – we have called these Protocols. A protocol is simply a name given to a follow up regime which includes the scores/surveys required and the time points to send them out. They may vary for different sets of patients, which is why you will have the option of setting up as many as you want. Unless a surgery is assigned a protocol no webscores will be available for the patient to complete automatically. The user has total flexibility as to which scores/surveys they choose at which time points and they can have as many protocols set up as they choose. The protocols can be named after the type of surgery, a study name, a surgeon’s name – it’s entirely up to the user. A protocol can have just one time point, and one score/survey selected or as many scores at as many time points as the users want to set up.

See the Protocols chapter in the manual for details about how to set these up.

Time points which can be selected are:

- Pre-injury – There are some scores that rate activity levels (Tegner, Marx, UCLA for example) and it’s sometimes useful to know what this was before the injury as well as pre and post treatment or surgery. Only those relevant to a pre injury time point will be available as options for this time point.
- Pre-op – prior to the surgery or procedure.
- Post-op - any time point in weeks, months, or years after the surgery or procedure. Some scores such as satisfaction surveys and global rating of change have questions that may only be relevant at either pre or post-op time points and won’t appear on the list to select as an option as a pre-op op score.

Remember that while we are referring to post op, it just means after the date that was entered in the date of surgery/treatment/start date.

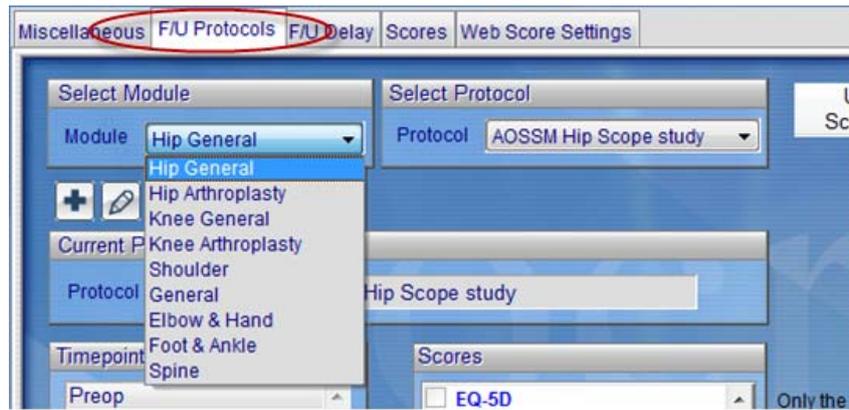
Setting up protocols

For each different module, you can set up and select as many follow-up protocols as you want. These will also then trigger recall lists for patients who are due back and enable the webscores to function. These are really follow up regimes – what scores you want to collect at what time points. This is one of the most important features of Socrates, not just for the web service, as there are reports and summaries linked to which protocol the surgery has been assigned to.

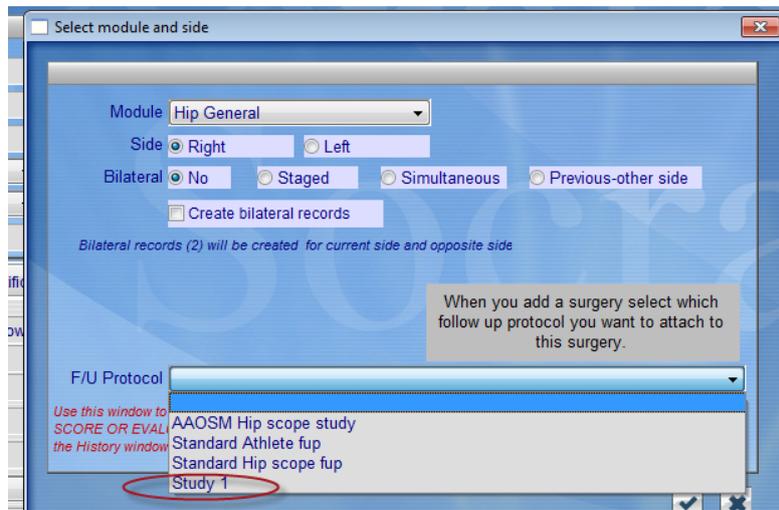
These protocols are very important to facilitate patient follow up. They are essential for automatic web based patient data entry as the program relies on the protocols for the time points and scores that have been selected to generate the list of what is due and when, for the patient to complete online.

When you add a new surgery, all of the follow-up protocols you have set up for each module will be displayed in a drop-down list. If a protocol isn’t selected for a surgery you can still enter data and scores but Socrates has no way of keeping track of what you wanted, no webscores can be sent out automatically, and nothing will turn up on the due for follow up or overdue scores report. You have to tell the program what you want and when, if you expect it to send anything or to know what is missing.

These protocols are created in the Set-Up Screen under the [Follow-Up Protocols tab](#).

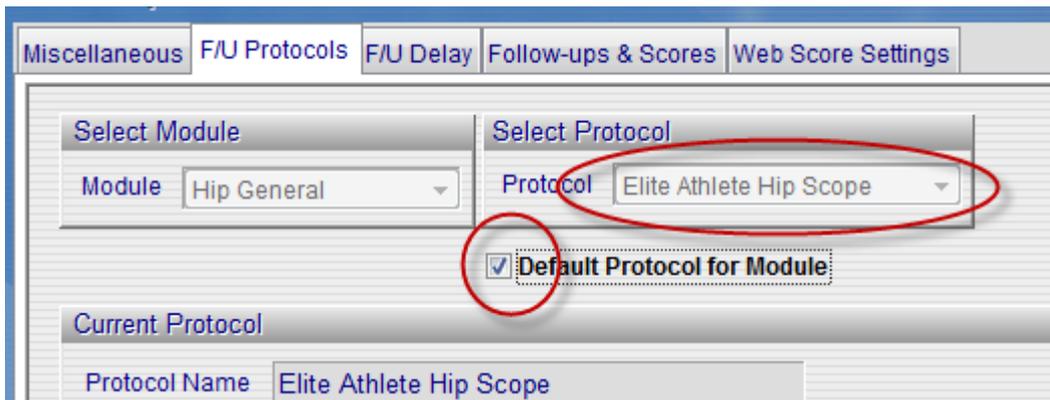


When a surgery or record is set up the appropriate protocol is selected from the list created by the user.



The example shows the four possible protocols available for selection when a new Hip General surgery is added. Remember, there will be no protocols in your New Database, as you need to create these for your own practice.

You can also select one as the default protocol for each module.



On the Protocol set up screen you can select one protocol from each module to be the default protocol. If this is checked in the web score settings, each time a record is added to that module it will be assigned this protocol. It can be changed for an individual record if you want to use a different protocol.

Go to the Protocols Chapter in the manual –for full details of how to add and set up protocols.

Once you have set up and selected a follow-up protocol for a new surgery, Socrates calculates the next dates due, based on the time points you have chosen in the protocol you selected for that particular surgery. For

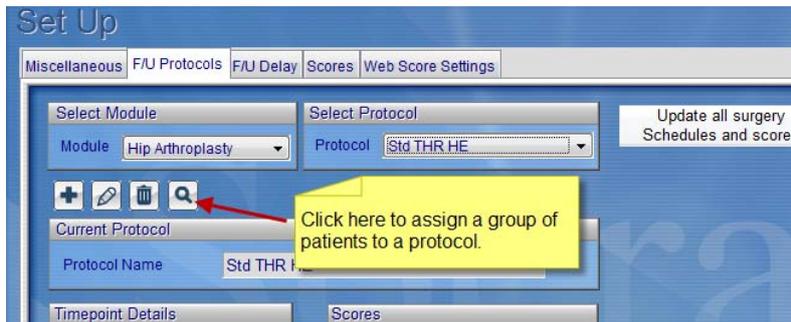
example, as soon as you enter a Date of Surgery into the record, the program will calculate the Next Visit Date (calculated as the date of surgery plus the time of the first selected follow-up interval). Additionally, the patient's name will appear on the missing scores report and the Web tracking report if the score/s were not entered by the due date. You can use the Score follow up report to check who is due for scores between a selected date range.

See more in the Reports chapter of the manual.

Assigning scores to an existing protocol

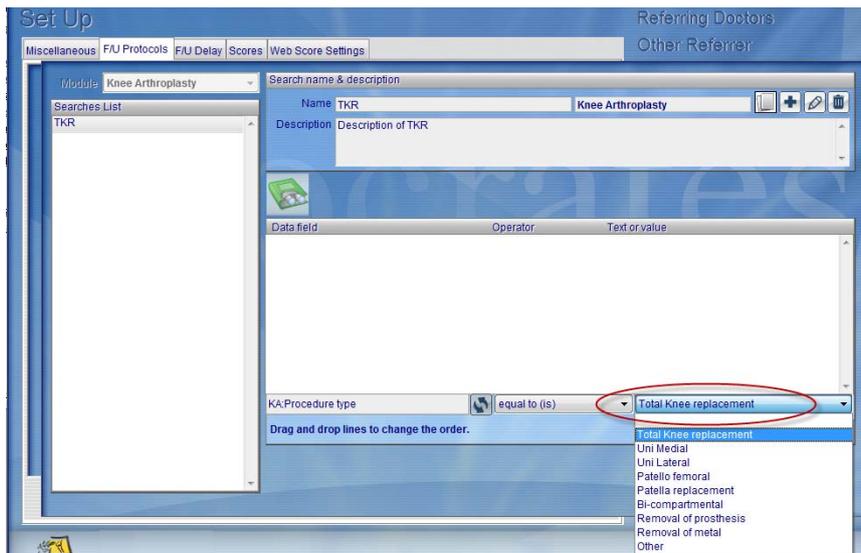
If you are an early user of Socrates you may not have your surgeries assigned to a protocol and may want to do this to start using webscores, or some of the new reports which are based on protocols. It's possible to use the search function to select existing surgeries that don't have a protocol assigned to them, and then assign one to the entire group.

To do this go to the Set Up screen, Protocols. On the right you will see the Search icon. Click on this icon and it will bring up the standard search window.

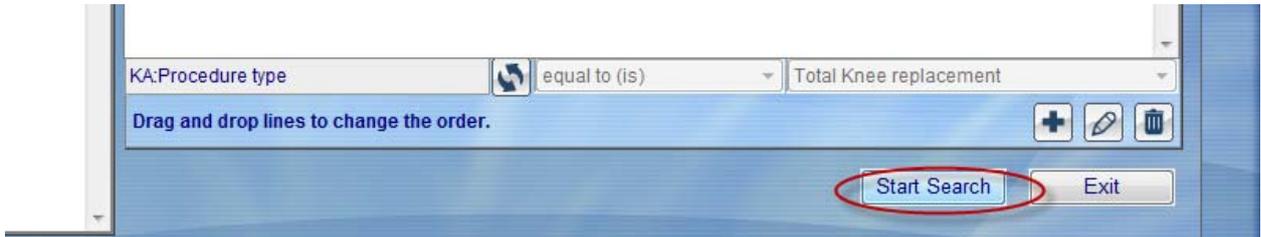


In the example below we have a created a protocol for all standard TKR's, with follow up time points and scores. We now want to assign all surgeries in our database which were Total Knee Replacements which had no protocols previously assigned to this protocol.

Once we had clicked on the search icon for that Protocol, we use the standard the search function to call up a list of all surgeries which were recorded as TKR. You can use this to select any criteria that you want using as many search parameters as you need in the same way as any normal search. If you had a different protocol for TKR's over 60 for example you would use "Age is => than 60" as well as the procedure type is TKR to list all those surgeries. If you wanted everyone in the module who didn't already have the protocol rather than a subset you can select all whose current age is => than 1 year, or all who are male, or all who are female and you will select all in the module assuming there is an age and a gender assigned to each record.



Once you have the list of those you want to assign to the protocol displayed, click on Start Search and the list of all those surgeries which meet the search criteria and **haven't already got a protocol** assigned to them, will display.

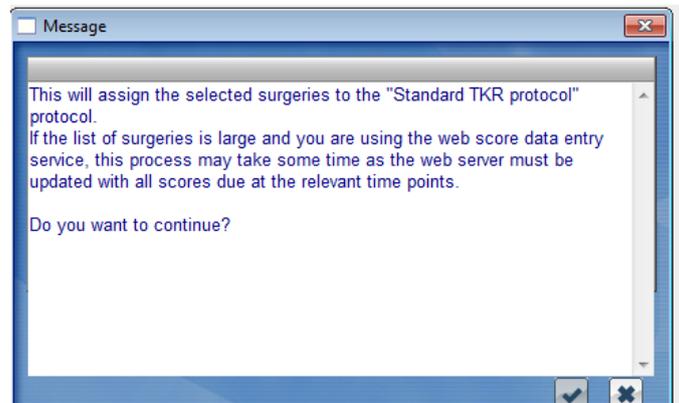


Check the following carefully.

- 1) The module and protocol you want your list assigned to is correct.
- 2) The criteria displayed on the bottom right is the correct one for the group you are going to allocate the protocol to. If it's not what you want use the red X to exit and start again.



Once you have checked these select the green tick. A message will be displayed asking you to confirm by clicking the green tick. If it's not what you want, use the X to exit and start again. This will only allocate protocols to surgeries which don't have one - if you want to change a surgery to a different protocol this needs to be done individually for the surgery.



Note, you will still have to assign the record to be web enabled manually. Thus it's a good idea to print out the list before you assign them so you know who they are.

Existing protocols and surgeries

If you are an existing user and have protocols already set up, these will still be useable and you can start using the web service as soon as the user has been set up for the web score service. However, if you had any time points and scores set up for these protocols prior to upgrading to the new version, they may need to be re-entered as the web version update may have deleted them. Check your protocols if you are an existing user, if they have been wiped all you need to do is go to the Set Up screen, Protocols tab, highlight the ones you want, select the modify icon and for each time point, reselect the scores again that you want to assign to the time points. See the chapter in the manual for how to modify existing protocols. All surgeries which were already

allocated to those protocols will now have those scores and time points assigned to them again. Once you are set up as a user of webscores, the scores at next time points due in those protocols (for surgeries which existed before you upgraded to the webscores version) will be sent out - providing the webscores enabled check box is selected for that surgery. That needs to be done for each surgery.

Displaying what's due for each surgery - Web Protocol Summary

This is an important screen as it shows you what scores are due and when for that record. To access this go to the history screen for the relevant surgery, then select the "Surgery" drop-down menu at the top of the screen and select Web Protocol summary.



This will list the scores selected and the time points due. This surgery was in a protocol UNI TKR with scores due at pre-op, 6 month and 2,5,10 and 15 year time points.

A screenshot of the 'Pending Communication with Web Server' window. The window title is 'Pending Communication with Web Server'. It shows a table of scores and time points. Annotations with red arrows point to various parts of the table and the 'How Due Dates are Calculated' section.

Timepoint	Due From	Due To	Score	Ready To Send	Score Completed	Sent At	Date Received
Preop	6 MAY 2013 10:24:39	20 MAY 2013 10:24:39	Kujala	YES	NO		
Preop	6 MAY 2013 10:24:39	20 MAY 2013 10:24:39	Patient Satisfaction+Pain (Preop)	YES	NO		
Preop	6 MAY 2013 10:24:39	20 MAY 2013 10:24:39	UCLA Activity	NO	NO		
Preop	6 MAY 2013 10:24:39	20 MAY 2013 10:24:39	VAS Pain	YES	NO		
6m			Global Rating of Change Scale	NO	NO		
6m			Kujala	NO	NO		
6m			Patient Satisfaction+Pain (Postop)	NO	NO		
6m			UCLA Activity	NO	NO		
2y			Global Rating of Change Scale	NO	NO		
2y			Kujala	NO	NO		
2y			Patient Satisfaction+Pain (Postop)	NO	NO		
2y			UCLA Activity	NO	NO		
5y			Global Rating of Change Scale	NO	NO		

How Due Dates are Calculated

- Preop - Date of surgery is today, preop timepoint is the time it is sent. No reminders.
- 6m - Date of surgery in the future, sent out 2 weeks before surgery date, valid up until midnight at the start of the date of surgery. Reminder sent 7 days after the initial email.
- 2y - No date of surgery entered, sent out immediately and valid for 14 days. Reminder sent 7 days after the initial email.

Annotations in the screenshot:

- 'Date due to send from the web server, to the patient at the valid time points.' points to the 'Due From' column.
- 'Date the score will expire and no longer be available' points to the 'Due To' column.
- 'Ready to send to, and the date the sent to the web server' points to the 'Ready To Send' column.
- 'Date the score was received' points to the 'Date Received' column.
- 'Scores selected and time points from protocol.' points to the 'Score' column.
- 'No surgery date yet, so no no post op dates can be assigned.' points to the empty 'Due From' and 'Due To' cells for 6m, 2y, and 5y timepoints.

This web score summary above has no dates set for the post op ones due as there is no surgery date entered. Once the surgery date is entered the due from and to dates are populated for all the time points and these will wait on the web server, and be sent out on those dates. Note that the manual scores do not show up on this list.

A screenshot of the 'Pending Communication with Web Server' window showing the same table as above, but with dates populated for the 6m, 2y, and 5y timepoints. An annotation points to the 'Due From' and 'Due To' columns for these timepoints.

Timepoint	Due From	Due To	Score	Ready To Send	Score Completed	Sent At	Date Received
Preop	6 MAY 2013 10:39:41	7 MAY 2013 10:39:41	Kujala	NO	YES	6 MAY 2013 10:33:37	
Preop	6 MAY 2013 10:39:41	7 MAY 2013 10:39:41	Patient Satisfaction+Pain (Preop)	NO	YES	6 MAY 2013 10:33:37	
Preop	6 MAY 2013 10:39:41	7 MAY 2013 10:39:41	UCLA Activity	NO	YES	6 MAY 2013 10:33:37	
Preop	6 MAY 2013 10:39:41	7 MAY 2013 10:39:41	VAS Pain	NO	YES	6 MAY 2013 10:33:37	
6m	22 OCT 2013 00:00:00	19 NOV 2013 00:00:00	Global Rating of Change Scale	YES	NO		
6m	22 OCT 2013 00:00:00	19 NOV 2013 00:00:00	Kujala	YES	NO		
6m	22 OCT 2013 00:00:00	19 NOV 2013 00:00:00	Patient Satisfaction+Pain (Postop)	YES	NO		
6m	22 OCT 2013 00:00:00	19 NOV 2013 00:00:00	UCLA Activity	YES	NO		
2y	8 MAR 2015 00:00:00	6 JUL 2015 00:00:00	Global Rating of Change Scale	YES	NO		
2y	8 MAR 2015 00:00:00	6 JUL 2015 00:00:00	Kujala	YES	NO		
2y	8 MAR 2015 00:00:00	6 JUL 2015 00:00:00	Patient Satisfaction+Pain (Postop)	YES	NO		
2y	8 MAR 2015 00:00:00	6 JUL 2015 00:00:00	UCLA Activity	YES	NO		
5y	6 APR 2018 00:00:00	5 JUL 2018 00:00:00	Global Rating of Change Scale	YES	NO		

Annotation: 'Dates now set going forward once surgery date was' points to the populated 'Due From' and 'Due To' columns for the 6m, 2y, and 5y timepoints.

Assigning a protocol and activating/enabling webscores for a surgery

Assuming that you are set up as a user of the service and selected the method (email or not) for the patient, there are now 2 things that need to happen to a surgery record before the details can be sent to the web service.

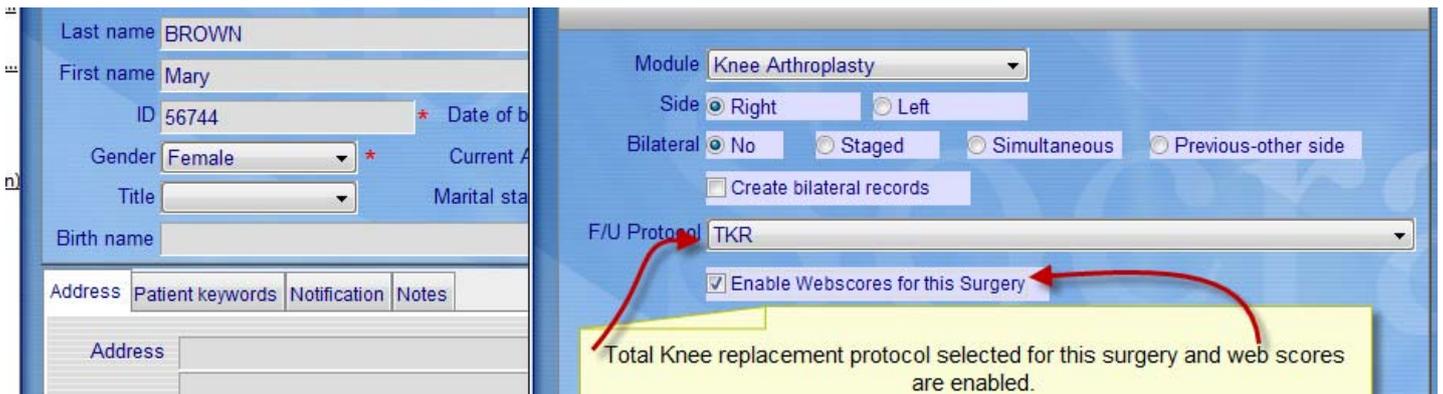
- 1) Add a protocol if using that method.
- 2) Enable webscores.

Now that you have your list of protocols you need to assign one of these to an individual surgery, and then enable the webscores process. You can set up a surgery with a protocol, and not activate webscores, but if you select Enable webscores and have no protocol selected no webscores can be sent out automatically.

This can be done in one of two places.

1. When you create a new surgery record for the patient in Socrates. This doesn't have to be an actual surgery, it can be just a record created for the R or L joint when the patient first comes to the clinic. At that stage you may not know that the patient is having surgery, or they may be followed for a non-operative procedure.

The window below where you select the side and bilateral status will display the list of protocols you have set up. If you know which one is to be used for that surgery at that stage, select the one you want from the F/U protocol list. If you know that this is to be a web score record select *Enable webscores*. If you have this set up as a default it will happen automatically.



If you don't know which protocol you want, or whether this will be a web score surgery when you first create the record you can always do it later from the History screen. On the far right you'll see the protocol field and the same list will be displayed here. Check the modify icon and select from the list. There is also a check box to *Enable webscores*. If these were selected when the surgery record was first created these will be filled in already.



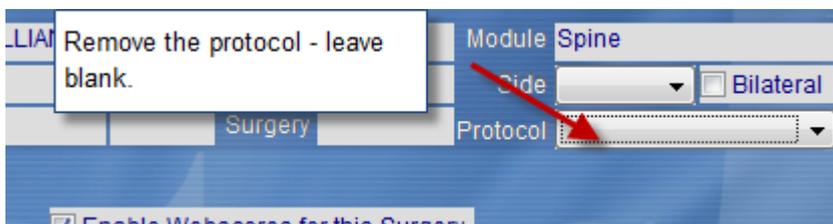
CANCELLING WEBScores

Once the webscores are set up the program using the protocol method Socrates will keep sending the webscores that are due until the time points on the protocol are completed, or the patient status has been changed unless something is done to cancel the process. This can be done in several ways.

- 1) Go to the history screen and unselect *Enable webscores*. This will disable it for this surgery only.



- 2) Remove the protocol and leave it blank. This will disable it for this surgery only.

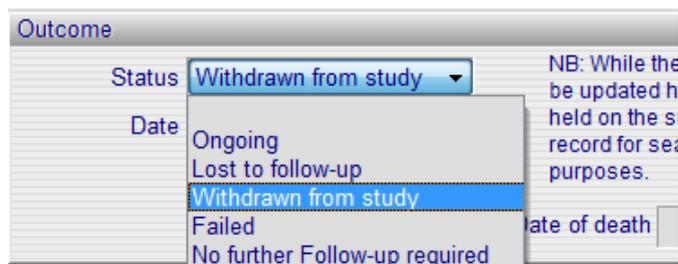


Change the surgery status – see below

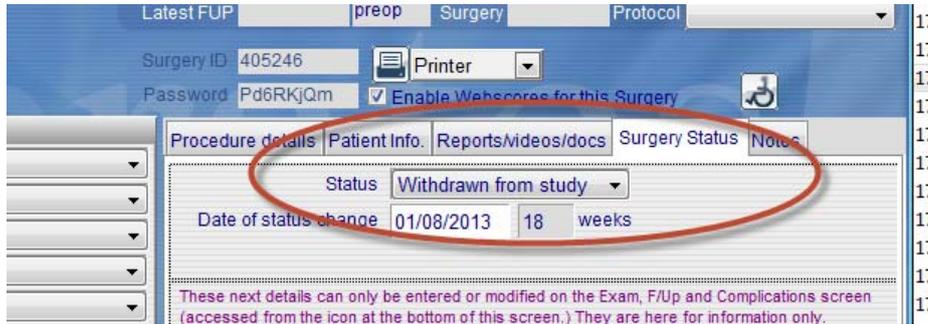
- 3) When a new surgery is created the status is set to 'ongoing' and, unless this is changed, it assumes that the surgery is still active to follow the regime/protocol that has been selected. Before the program sends any scores to the web server it first checks to see what the status is. If it is set to ongoing the webscores will continue to be sent. If any of the other fields on the status list are checked no webscores will be sent out. It's important that users keep this up-to-date on their database if patients withdraw from studies, are lost to follow up, died or have failed. If this isn't done they will continue to receive emails and will show up as overdue for follow up on the reports until the protocol time points are finished. This will disable it for this surgery only unless the patient has died in which case it will be set for any surgeries they have. If the patient has other surgeries the status may need to be changed on those also.

If the status on the Surgeon Follow-Up Screen has been changed to any of the options other than Ongoing, it will automatically be removed from the follow-up and the web score list for that specific surgery.

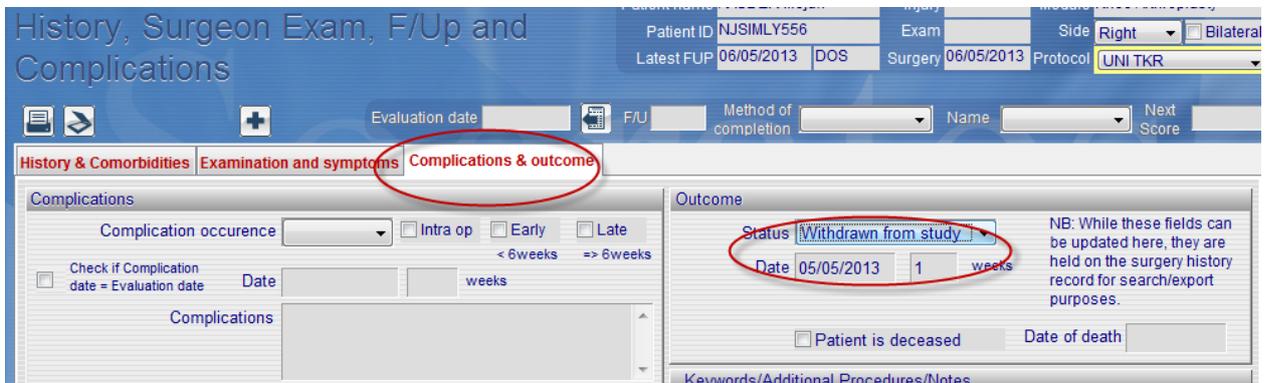
These are the status options



To find this, click on either the examination screen at the bottom of the history screen or on the history screen, Surgery Status tab. Whichever you use, it will be cross populated to the other and stop any further scores being sent out.

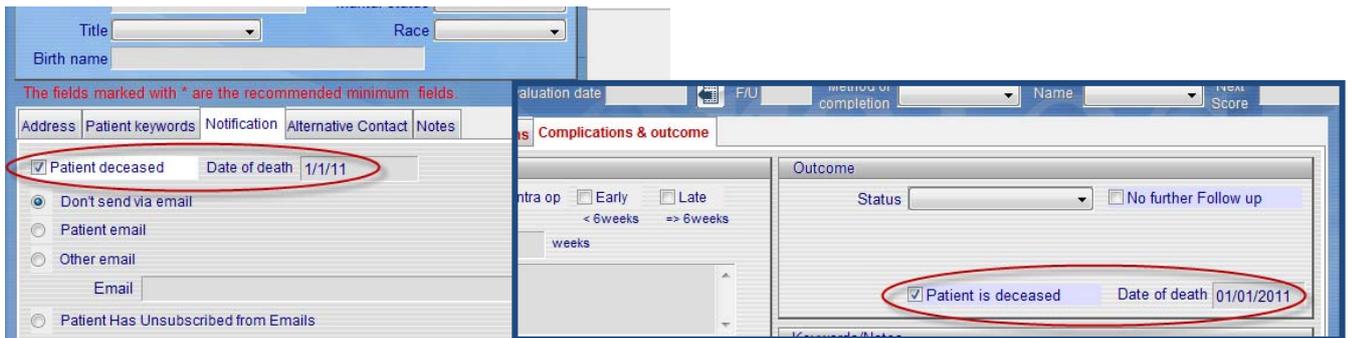


On the complication and follow up screen there is a field called Patient Status. This is where to find it on this screen.



Deceased patients

The webscores will also look for the deceased status of the patient before it sends anything out. This can be recorded either on the demographic screen or the examination screen for a selected surgery. It will automatically be cross populated from one screen to the other so it doesn't matter which screen it is entered into. This will disable it for ALL surgeries attached to that patient's record.



Method of competition

Any scores entered via the web server will be automatically be logged on the score screen on the "Method of Completion" field as "web data entry".



The score responses will be entered into the relevant score screen in Socrates once the data has been collected from the web server. If the patient has missed questions out the score will be calculated in the same way as if they were entered manually - if the score allows missing answers it will score, if not, the answers will be stored but no score calculated. The date of entry is **not recorded** in the evaluation date field, just the follow up period as selected in the protocol. The date the score was entered will be recorded on the score screen in the top left hand corner, in the data entry log and in the webscores tracking report. It can also be exported into excel using the standard export function for scores, on this report it will show up in a column of its own as input date.



Bilateral Surgeries

These are treated as 2 separate surgeries. The patients will have a different ID and password for each surgery. If they were created at the same time the ID it will most likely have the next consecutive ID number.

MANUAL METHOD

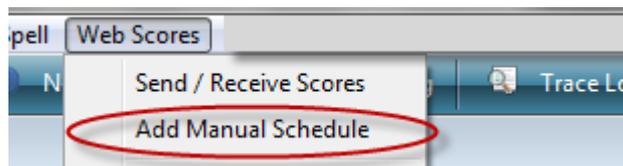
As well as the “set and forget” method which requires a follow up protocol being assigned to each record, it is possible to send any of the scores, for an individual record, or a group of records at any time. This method operates **separately to any protocols** that are set up for the same record. It will ignore what is set up in their protocol, and send exactly what you ask for at the current time point. If there are web scores due to be sent from the protocol at the same time point, both the manual scores and those due for the protocol will be available for the patient to complete even if they are the same. If they are the same, you will have 2 scores, at the same point for that record.

How to send scores manually to individual surgery records.

There will be times that you want to know an individual patient’s status right then and there, regardless of whether they have had surgery, or how low long after their surgery they are, and whether they are already in a follow up protocol. For example:

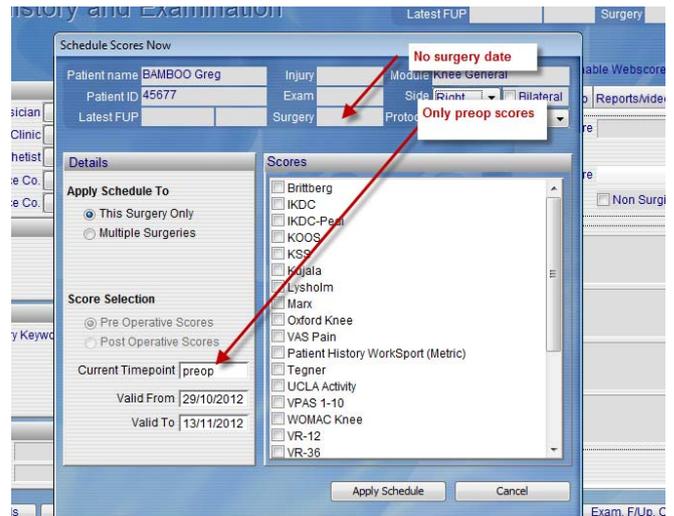
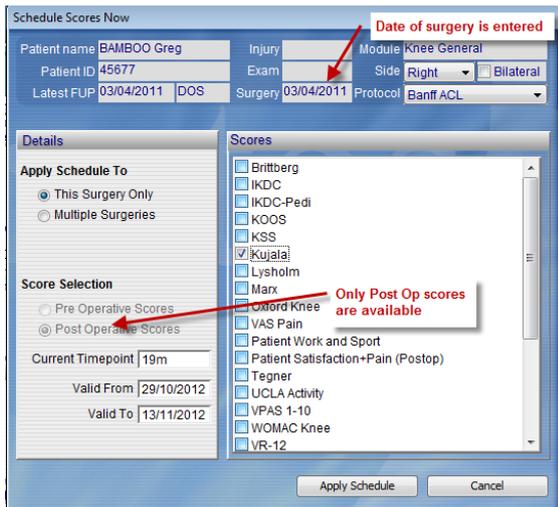
A patient is in a follow up protocol after a THR, their time points are pre-op, 3months, 2 years, 5 years, 10 years. They come back to the clinic at 3 years post-op complaining of pain, and you would like to have the same scores they have in their protocol filled out at the 3 year time point, or maybe even some additional ones.

Once inside that record, go to the menu bar at the top and select **Add Manual Schedule**.

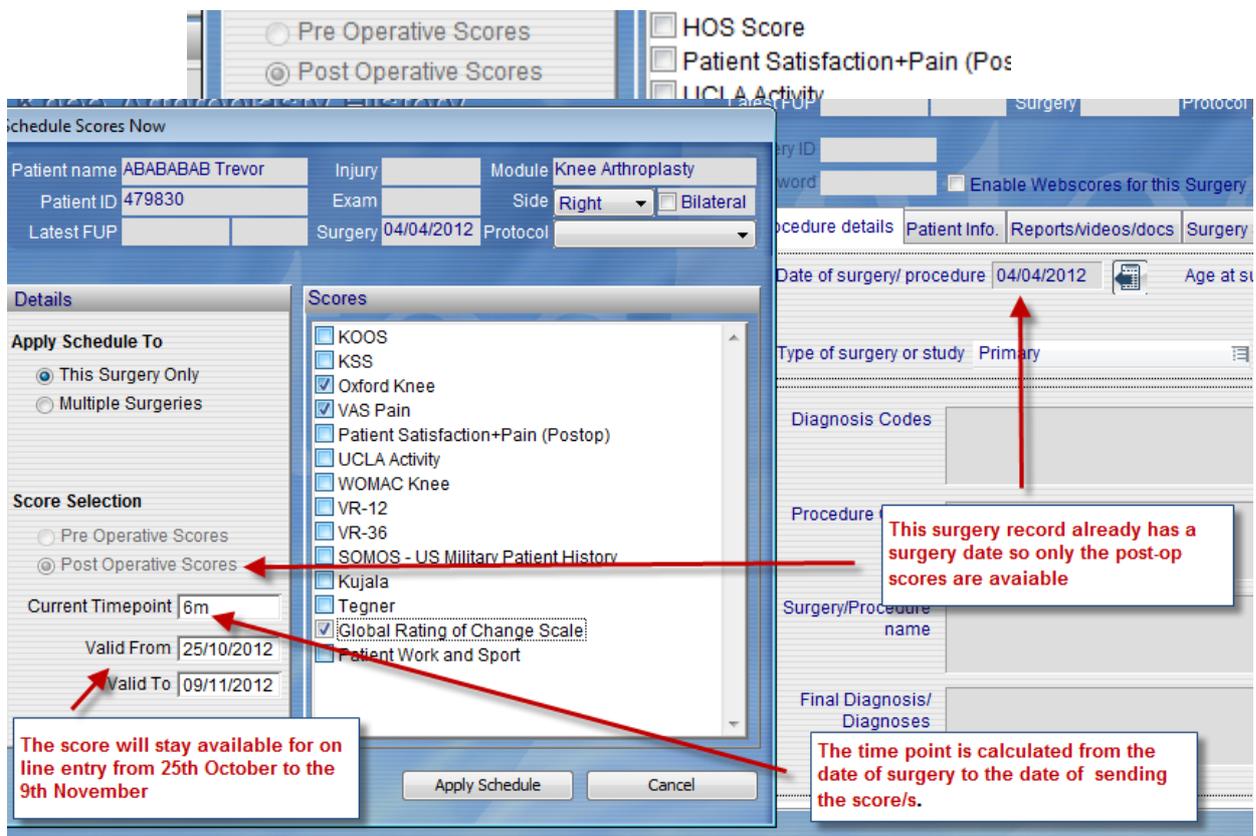


Note: You can only send a score to an individual patient’s record if you are **inside the record** where you want the score/s assigned to. However, you can send manual web scores to a group of patients from either the main screen, or from inside an individual patient record.

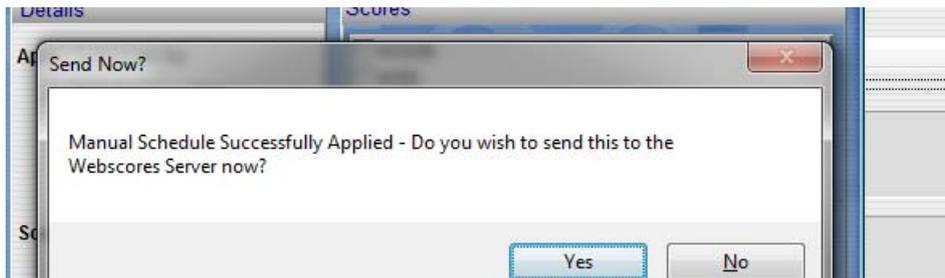
The following screen will be displayed. If there is no surgery date only the pre-op scores will be available. If the surgery has already occurred for that surgery only the post-op scores will be displayed as options. They can be different as there are some scores that are only for pre-op, or post-op time points.



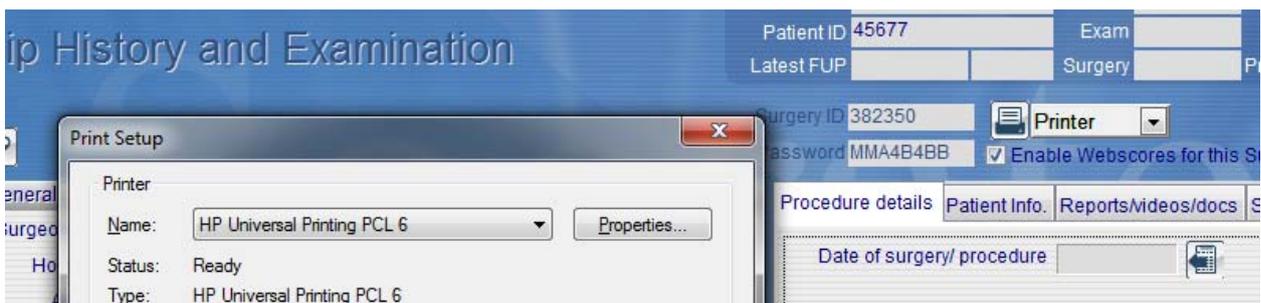
- Select the score/s you want to send
- If it's a post-op score the time point will be calculated by Socrates based on the date of surgery and the current date. For example, if the surgery date was 1/1/11, and you are sending the manual score on the 3/3/11 the time point would display as 2m, as that's 2 months 2 days since surgery. The dates of how long it will be available for web entry from and to are displayed. All manual scores are available for entry for 2 weeks from the date they are sent. After the **Valid To** date the score will no longer be available to complete on line as it will be too far out of the time point. The scores in the screen shot will be available for 15 days) note to US users, the date format show here is day/month/year rather than the way the US displays the dates, your program will display it in the UDS format.



Once you have selected what you want, click on **Apply Schedule**. You don't have to web enable that record or any for the group ones. It assumes that if you want to send the manual score, you want it to be a web score. You can either select Yes, or wait until the next time your program sends/receives messages to the web server.



From this point the patient will either receive an email, if that's what selected as their method of notification, or they can log in using the local entry. This is the same as they were using the protocol method. Once you have refreshed the screen (gone out and come back in again) you will see the ID and password displayed to enable the patient to log into the Socrates server to fill in their scores. Click on the print icon to either print, preview or save as a pdf. a document which has the log in details of the link to the web server, and the ID and log in password.



Sending scores manually to a group

There will be times when you will want to send scores out to a group of patients. An example would be a retrospective group added to Socrates which are all at different follow up time points. You want a score/s for all of them, regardless of their follow up period. Another could be a group you want reassess at the current time point as they all have the same implant and you are concerned that there might be some early problems with it. As long as you have a way of searching for this group in Socrates, you can assign a score/s to the whole group rather than having to do it record by record.

You can send scores to a group from the main demographic screen of any patient, or from inside an individual patient's record. However, if you are on the demographic screen the only option you will have is to send scores to a group, as you are not logged in to an individual record.

The list of scores will be displayed, select the ones you want, then click. The time point will be calculated for each record based on time since their date of surgery and the date the score was sent to the web server.

The pre-op and postop scores are listed separately as there are some scores that are only for pre-op, or post-op time points.

Schedule Scores Now

Patient name: ABABABAB Trevor | Injury: | Module: Knee Arthroplasty
 Patient ID: 479830 | Exam: | Side: Right | Bilateral:
 Latest FUP: | Surgery: 04/04/2012 | Protocol: |

Details

Apply Schedule To

- This Surgery Only
- Multiple Surgeries

Score Selection

- Pre Operative Scores
- Post Operative Scores

Current Timepoint: 6m
 Valid From: 25/10/2012
 Valid To: 09/11/2012

Scores

- KOOS
- KSS
- Oxford Knee
- VAS Pain
- Patient Satisfaction+Pain (Postop)
- UCLA Activity
- WOMAC Knee
- VR-12
- VR-36
- SOMOS - US Military Patient History
- Kujala
- Tegner
- Global Rating of Change Scale
- Patient Work and Sport

Callouts:

- "This surgery record already has a surgery date so only the post-op scores are available" (points to the surgery date field)
- "The score will stay available for on line entry from 25th October to the 9th November" (points to the Valid To date)
- "The time point is calculated from the date of surgery to the date of sending the score/s." (points to the Current Timepoint field)

Schedule Scores Now

Multiple Surgeries have been selected. Please select which Module you wish to search within to apply your manual schedule. Click on 'Apply Schedule' when you have finished selecting scores to begin the search for which surgeries you wish to apply the schedule to.

Details

Apply Schedule To

- This Surgery Only
- Multiple Surgeries

Score Selection

- Pre Operative Scores
- Post Operative Scores

Module: Hip General
 Valid From: 29/10/2012
 Valid To: 13/11/2012

Scores

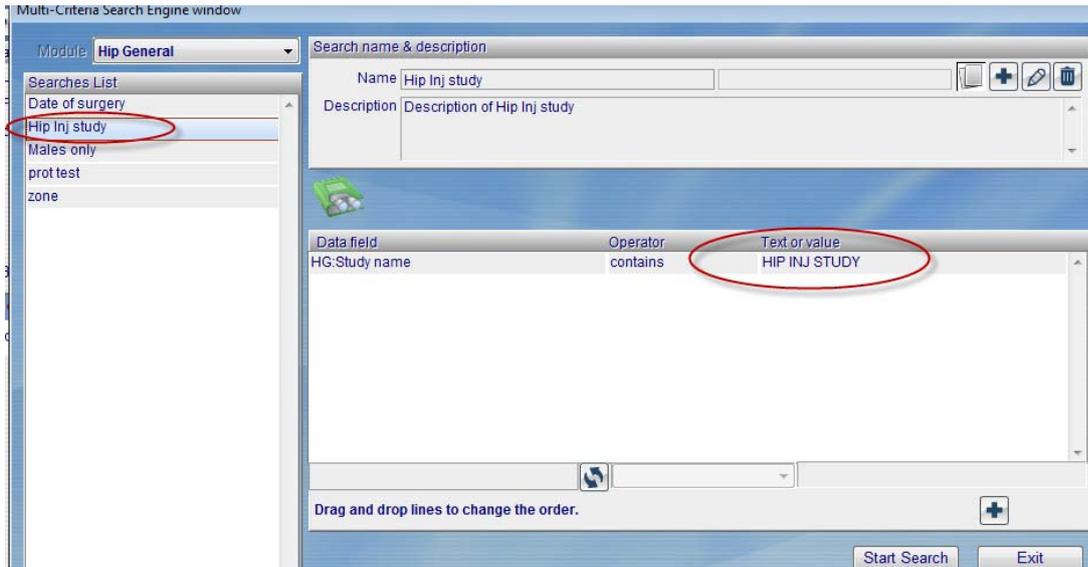
- IHOT33
- IHOT12
- Modified HHS
- NAH Score
- Oxford Hip
- VAS Pain
- Patient History WorkSport (Metric)
- HOS Score
- UCLA Activity
- WOMAC Hip
- VR-12
- VR-36
- SOMOS - US Military Patient History
- Patient History WorkSport (US)
- HAGOS
- VAIL Hip Score

Callouts:

- "If you are sending scores from outside a surgery record only sending to multiple surgeries is possible." (points to the Multiple Surgeries option)
- "Select the list of preop or postop scores." (points to the Pre Operative Scores option)

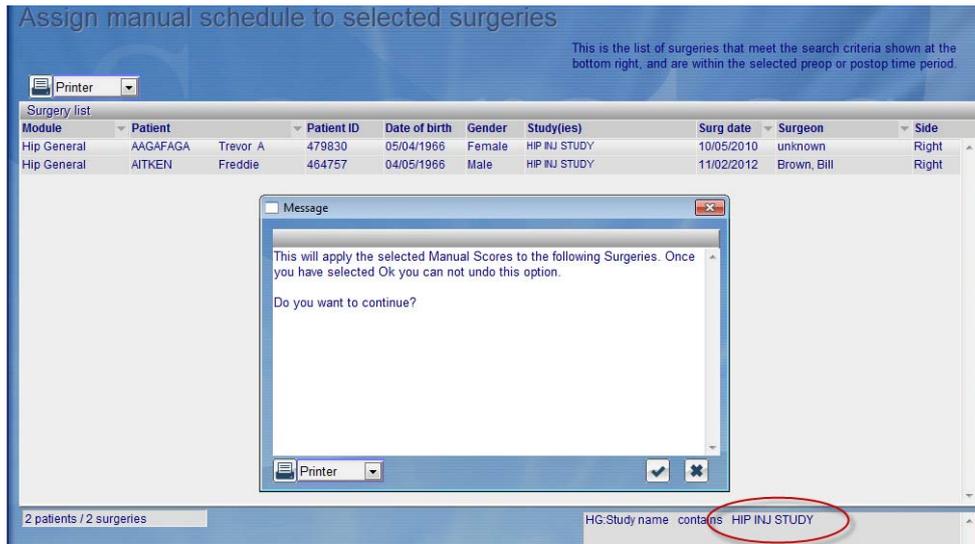
Once you have selected the score/s you want click on Apply Schedule. You will then see the standard search window displayed. This is asking you to use the search function to select which records/surgeries that you want to have the list of scores sent to. What you select depends on how you have categorised the group in Socrates, by study name, surgeon name, protocol, implant used etc. If you want to send it out to all patients in that

module a quick way to catch them all is to set up a search for all patients whose age at surgery is greater than or equal to 0.

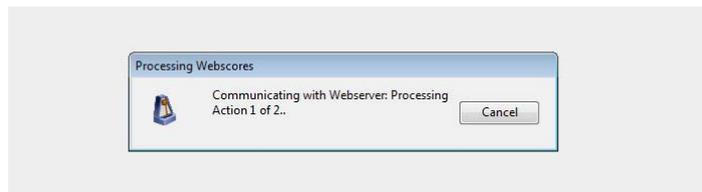


In the example above, we have selected to send scores to all records that are in the Hip Inj study in the Hip General module.

Once you click on Start Search, the list of those records that fit that search criteria will be displayed.

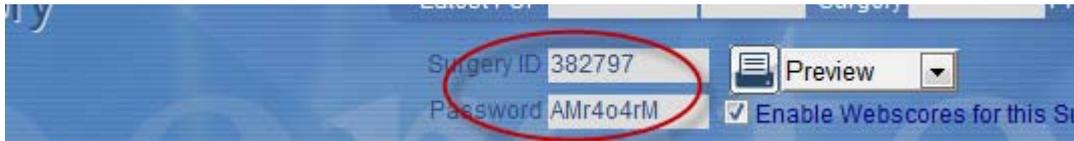


Once that's done it will ask you again if you want to send the scores to the web server right then, or wait until the next time it communicates with the web server. The frequency of this is based on how often you have selected this to occur in your Set Up.

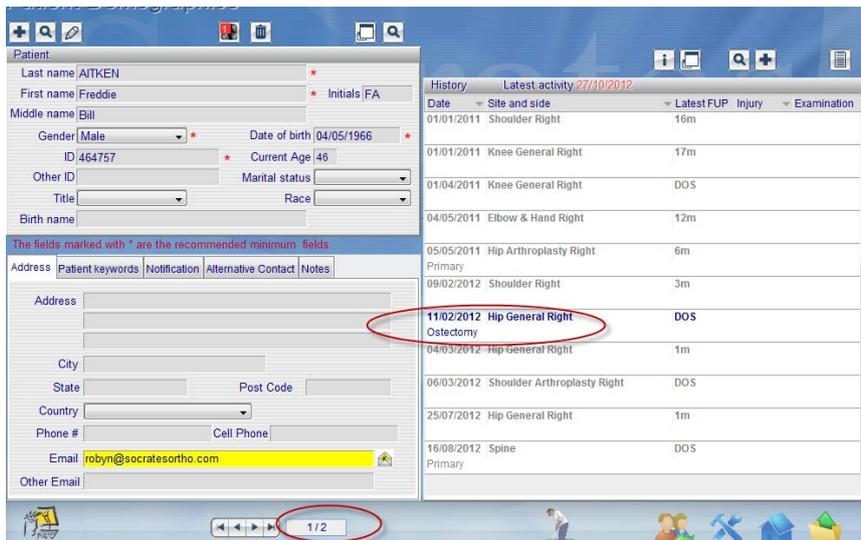


From this point the patient will either receive an email, if that's what selected as their method of notification, or they can log in using the local entry. This is the same as if they were using the protocol method. Once you have refreshed the screen (gone out and come back in again) you will see the ID and password displayed to enable them to log into the Socrates server to fill in their scores. Click on the print icon to either print, preview or save

the log in details. Click on the print icon to either print, preview or save as a pdf. A document which has the log in details of the link to the web server, and the ID and log in password.



Once this is done, you will be returned to the first patient in the group you selected, and that particular surgery/ies highlighted. To return to the main patient group click on the 2 face icon.



Cancelling manual scores

This can only be done one surgery record at a time and it's a bit fiddly. To do this go to the history screen of the record, and click modify, then uncheck the web score enabled check box. Then do a send and receive. This will remove any scores that are on the web server. If the record is also in a protocol and you want that to be still current select modify again, then recheck web enabled, then save and send and receive. This protocol will then be reinstated on the web server. If an email with the manual score had already been sent to the patient but wasn't completed, when they click on the link it will say that there are no scores to be completed.

SETTING UP AS A USER

First you need to set up your database to be web enabled. Once you have registered as a user you will receive a User ID and password from Socrates Ortho.



- Select the modify icon
- Type in **webscores.socratesortho.com** to the Web Server field
- Type in your user number – this will have been sent to you by Socrates Ortho.
- Type in your password – this will have been sent to you by Socrates Ortho. Be very careful with this as if it's incorrect the web service won't work.
- Type in the email address which you have set up to appear as the sending address of the emails.
- Click Enable webscores for the database.

You are now set up to be able to send and receive messages to the web server.

A detailed screenshot of the 'Set Up' application window with several red callout boxes and arrows pointing to specific fields and buttons. The window has a title bar 'Set Up' and a menu bar with 'Miscellaneous', 'F/U', '& Scores', 'Web Score Settings', and 'Event Logging'. The 'Web Score Settings' menu item is selected. The main content area is divided into sections: 'Database Settings', 'Database Defaults', and 'Local Settings'. The 'Database Settings' section contains fields for 'Web Server' (webscores.socratesortho.com), 'User Number' (10), 'Password' (masked with dots), and 'Local Email' (robyn@socratesortho.com). There is a checkbox for 'Enable Web Scores for this Database'. The 'Database Defaults' section has two checked checkboxes: 'Prompt to choose email as method of notification if a patient email address is entered.' and 'Enable webscores for new surgeries by default.' The 'Local Settings' section has a checked checkbox 'Automatically check for new scores and process queue', a dropdown menu for 'Interval' set to '10 Minutes', and a checked checkbox 'Check for scores when logging into database'. On the right side, there are several buttons: 'Test Connection', 'Unlock Processing', 'Rebuild Server Schedule', 'Repair Duplicated Protocols', and 'Update Operation Details'. Red callout boxes with arrows provide instructions: 'We will give you your user number and password.' points to the User Number field; 'This is the email you gave us, the patients will see this in their inbox.' points to the Local Email field; 'Dont worry about all these.' points to the 'Test Connection' button; 'Once all the top fields are entered, test the connection, then if its OK, check Enable Web Scores.' points to the 'Enable Web Scores' checkbox; 'Set what you want here on ONE computer only.' points to the 'Local Settings' section; and 'This should be set on ONE workstation only.' points to the 'Automatically check for new scores and process queue' checkbox.

Database and Local Settings

There are 2 sections on this screen, **Database Settings** and **Local Settings**.

The **Database Settings** are visible to all computers accessing the database and contain the details that the web server needs to be send and receive the scores to your own copy of Socrates.

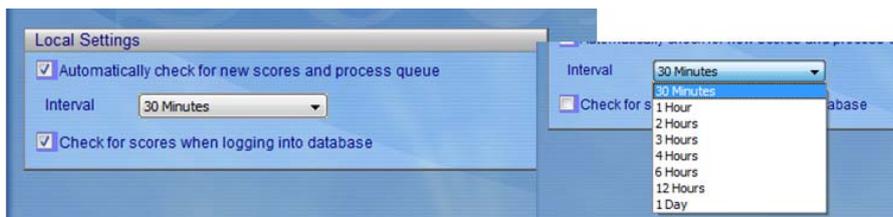
DO NOT EVER CHANGE THESE WITHOUT CONTACTING US - any changes made by a user will no longer match what's been set up on the web server for your database and the web scores will no longer function. If you need to change your email address at any stage let us know and we can reset this on our user database.

The **Local Settings** should be set up on the **MAIN machine only**, this would be the one that is connected to the internet, and will be sending and receiving to the web server.

They are called local settings as they belong to the individual computer, database settings belong to the database overall. If you have multiple computers using Socrates only the main machine would have anything entered in the local settings.

How often to send and receive scores

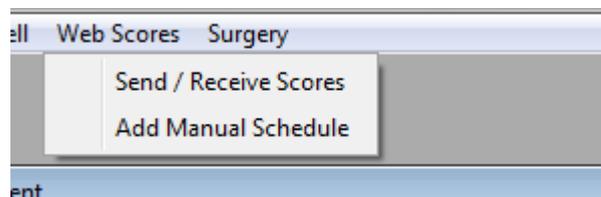
The local settings section on this tab gives you some options as to how often you want to communicate to and from the web server. These should only be entered on the main computer which is sending and receiving the messages to the web server. You can always come back and change these. You might find if you have selected too frequent an interval and that it interrupts your data entry, as it will pause anything that's happening while it sends and receives scores.



If you want the database to automatically send and receive scores, check this box then select how often you want this to occur from the drop down list entitled Interval.

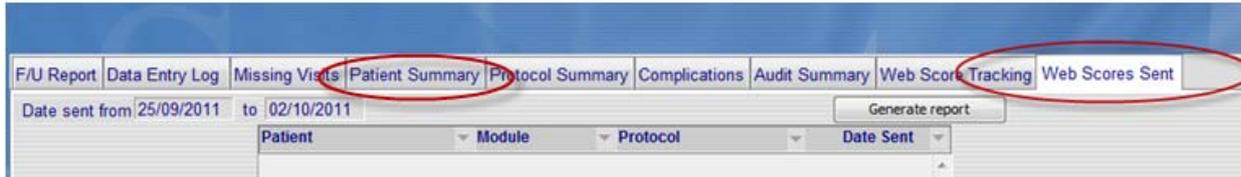
If you want the database to check for any scores due to go out, or waiting to come in when first logging on check this box also.

Don't forget that you can also send and receive messages at any time manually by going to the "Web Scores" menu on the top dropdown menu using either of the first 2 options, *Process Queue* will send, **Check for new web scores** will receive any completed and not yet returned.



MONITORING WHAT BEEN SENT AND RETURNED

Reports can be generated which list all the patients and protocols which have been sent to the web server between selected dates, and the results for individual patients. These reports can be accessed from the Reports icon on the home page.



Webscores Sent

This report records what scores have been sent to the web server and when they were sent. It will default to the previous week, but you can select whatever date range you want. It lists the module and the name of the protocol.



Webscore Tracking

This is an important report as it tracks the time from sending, to completing the score, the method chosen (email or in clinic) and those that have not been completed.

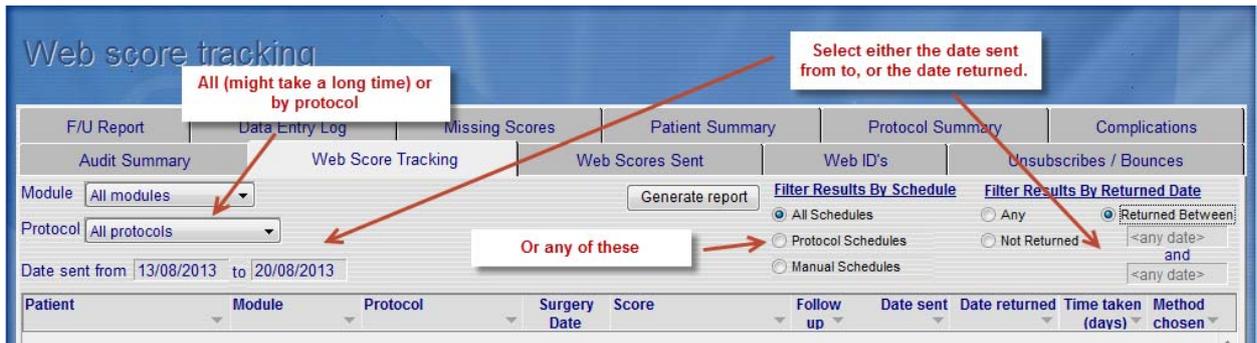
This report will only show the records that have either completed their scores, or it will show those that have passed the last date their scores are due as not returned if they haven't filled them out. It won't show any that are still in the current time point as the score/s are still available but not yet returned.

There are 4 tabs relating to the web scores. The first two track what has been sent and received, when it was sent to the web server, how long it took to come back, the method chosen, and those that haven't been returned. There is a date range which will automatically default to the preceding week, but users can enter their own date range. It's a good idea to run the web scores sent report weekly and print or save it so you can keep track of those patients who don't complete their scores. You can also select to only return those that haven't been returned.

The method chosen will be either Email or Local Score Entry (if the score was filled in via the web in the clinic). If they are not completed in the due time they will appear in red as Not Returned. Note they don't appear on the Not Returned list until the time allowed after the due window date has expired. If you want to see only those that haven't been returned select the check box "Only display not returned"

The time taken to complete is displayed in days, if it is returned the day it was sent, it will show up as 1, the next 2 and so on.

IMPORTANT: The method chosen is derived from the notification method selected in the patient demographic screen. If you have filled in some scores using the Local method, but have the email method selected these will appear on the list as "email" as the program isn't clever enough to know that the patient actually filled it out in the clinic on that occasion.



The web tracking screen also has a separate tab at the bottom which totals the number of patients, protocols and scores that have been sent out. It will also show

- The average days to completion for both the email and the in clinic method.
- Number of scores sent out at the different time points
- Number sent and received, and % returned and not returned by score and time point

The screen below lists the patients' names and each record sent, and the method and time taken to be returned.

Patient	Module	Protocol	Surgery Date	Score	Follow up	Date sent	Date returned	Time taken (days)	Method chosen
ANDREWS, Fred	Spine	Manual Schedule		Spine Medical History (Mel	preop	30/01/2013	Not Returned	--	--
ANDREWS, Fred	Spine	Manual Schedule		Spine Medical History (Mel	preop	30/01/2013	30/01/2013	--	other
ANDREWS, Fred	Foot & Ankle	Manual Schedule		AFAOS	preop	21/01/2013	Not Returned	--	--
NEWHEY, Fred	Shoulder	Manual Schedule		DASH	preop	07/01/2013	07/01/2013	--	other
ADADADA, Test	Shoulder	Manual Schedule		VAS Pain	preop	12/02/2013	13/02/2013	1	other
ADADADA, Test	Hip Arthroplasty	Manual Schedule	12/02/2011	SANE/Pain	preop	05/02/2013	12/02/2013	7	other
ADADADA, Test	Shoulder	Manual Schedule		VAS Pain	preop	05/02/2013	05/02/2013	--	other
ADAMS, Roger	Shoulder	Manual Schedule		VAS Pain	preop	12/02/2013	25/02/2013	13	other
ADAMS, Roger	Hip General	Manual Schedule		Oxford Hip	preop	22/02/2013	28/02/2013	6	other
ADAMS, Roger	Spine	Manual Schedule	25/01/2013	VR-12	preop	28/01/2013	Not Returned	--	--
ADAMS, Roger	Spine	Manual Schedule	25/01/2013	Spine Medical History (US	preop	28/01/2013	28/01/2013	--	other
ADAMS, Roger	Hip General	Manual Schedule	03/12/2012	IHOT12	4m	22/04/2013	24/04/2013	2	other
ADAMS, Roger	Hip General	Manual Schedule	03/12/2012	UCLA Activity	4m	22/04/2013	24/04/2013	2	other
ADAMS, Roger	Hip General	Manual Schedule	03/12/2012	Patient Satisfaction+Pain (4m	22/04/2013	24/04/2013	2	other
ADAMS, Roger	Shoulder	Manual Schedule		VAS Pain	preop	12/02/2013	Not Returned	--	--
ADAMS, Roger	Elbow & Hand	Manual Schedule		Mayo Elbow	preop	12/02/2013	12/02/2013	--	other
VERGER, Bill	Spine	Manual Schedule		Spine Medical History (Mel	preop	30/01/2013	30/01/2013	--	other
BELLINI, Chiara	Knee Arthroplasty	Manual Schedule		Patient Satisfaction+Pain (preop	15/02/2013	Not Returned	--	--
BELLINI, Chiara	Knee Arthroplasty	Manual Schedule		UCLA Activity	preop	15/02/2013	Not Returned	--	--
BELLINI, Chiara	Knee Arthroplasty	Manual Schedule		KOOS	preop	15/02/2013	Not Returned	--	--

The totals screen

Web Tracking Totals (Ignoring Filters)	
Total patients included: 79	
Module - Elbow & Hand: 1/7 (14%)	By module
Module - Foot & Ankle: 6/13 (46%)	
Module - Hip Arthroplasty: 20/92 (22%)	By protocol
Module - Hip General: 30/93 (32%)	
Module - Knee Arthroplasty: 4/44 (9%)	By protocol
Module - Knee General: 12/45 (27%)	
Module - Shoulder: 16/130 (12%)	By protocol
Module - Spine: 23/116 (20%)	
Protocol - AFAOS: 2/6 (33%)	By protocol
Protocol - AM: 0/4 (0%)	
Protocol - Amy: 2/4 (50%)	By protocol
Protocol - Badleg: 2/12 (17%)	
Protocol - Banff ACL: 1/6 (17%)	By protocol
Protocol - Brett Test: 7/17 (41%)	
Protocol - Bruce: 3/6 (50%)	By protocol
Protocol - CA test: 0/24 (0%)	
Protocol - Chris: 3/5 (60%)	By protocol
Protocol - DASH: 1/1 (100%)	

Score - AFAOS: 1/4 (25%)	Totals by score
Score - ASES: 0/4 (0%)	
Score - Biceps Functional Outcome: 0/1 (0%)	Totals by score
Score - Constant: 1/13 (8%)	
Score - DASH: 0/1 (0%)	Totals by score
Score - DASH w/Work Sport: 1/3 (33%)	
Score - Distress and Risk Management: 2/7 (29%)	Totals by score
Score - FAAM: 1/1 (100%)	
Score - Flexilevel Scale of Shoulder Function: 1/3 (33%)	Totals by score
Score - Global Rating of Change Scale: 2/4 (50%)	
Score - HAGOS: 2/2 (100%)	Totals by score
Score - High Activity Arthroplasty Score: 1/2 (50%)	
Score - HOOS: 7/13 (54%)	Totals by score
Score - HOS Score: 1/5 (20%)	
Score - IHOT12: 7/22 (32%)	Totals by score
Score - IHOT33: 0/1 (0%)	
Score - IKDC: 2/3 (67%)	Totals by score
Score - Kerlan Jobe: 0/2 (0%)	
Score - KOOS: 2/14 (14%)	Totals by score
Score - KSS: 0/1 (0%)	

Web Tracking Totals (Ignoring Filters)

Follow-up - 3y:	2/4 (50%)
Follow-up - 4m:	3/6 (50%)
Follow-up - 5m:	1/3 (33%)
Follow-up - 6m:	7/31 (23%)
Follow-up - 7m:	0/4 (0%)
Follow-up - 31w:	0/1 (0%)
Follow-up - 8m:	0/6 (0%)
Follow-up - 1m:	3/4 (75%)
Follow-up - 10m:	0/1 (0%)
Follow-up - 11m:	2/4 (50%)
Follow-up - 12m:	0/6 (0%)
Follow-up - 1y:	0/6 (0%)
Follow-up - 64w:	0/1 (0%)
Follow-up - 18m:	2/8 (25%)
Follow-up - 19m:	0/4 (0%)
Follow-up - 2m:	0/2 (0%)
Follow-up - 20m:	0/1 (0%)
Follow-up - 21m:	0/3 (0%)
Follow-up - 23m:	0/1 (0%)
Follow-up - 2y:	2/11 (18%)

Totals by time point

Average days for email:	4.7
Average days for local:	10.4
Average days for other:	4.2
Average days for both:	5.3
Returned score method - email:	68
Returned score method - local:	14
Returned score method - other:	30
Returned:	112 (21%)
Not returned:	428 (79%)
Total scores in report:	540

Overall totals

Individual patient monitoring

The patient summary will show any scores which have deteriorated since the pre-op and previous visit as a negative value, as well as being highlighted in red. It's possible to display this list just for patients who have completed their scores online, by selecting the Webscores only option tab at the bottom left.

Patient summary report

Module: Spine | Protocol: All protocols | Search: <Search details. If empty include all.> | Printer: [icon] | Select date entered range: [input]

Mod	Protocol	Score	Patient	Surg Date	Side	Last Score Entered	Follow-up period	Result name	Preop score	Latest score	% change	Prev score	% change
SP	Std spine	Oswestry V2.1a	AARDVARK, Peter		R	25/09/2011	-	Score	34	-	-	-	-
			ABBOT, Greg		R	02/10/2011	-	Score	60	-	-	-	-
				02/04/2011			6m	Score	58	50	14%	-	-
			ADADA, Dess	02/04/2011	R	30/09/2011	-	Score	42	-	-	-	-
		SRS22R	AARDVARK, Peter		R	25/09/2011	-	Total	2.91	-	-	-	-
								Pain	3.40	-	-	-	-
								Self Image	2.60	-	-	-	-
								Function	3.20	-	-	-	-
								Satisfaction	2.00	-	-	-	-
								Mental	2.80	-	-	-	-
			ABBOT, Greg		R	02/10/2011	-	Total	2.55	-	-	-	-
								Pain	3.40	-	-	-	-
								Self Image	2.00	-	-	-	-
								Function	2.40	-	-	-	-
								Satisfaction	3.00	-	-	-	-
								Mental	2.20	-	-	-	-
				02/04/2011			6m	Total	2.86	3.14	10%	-	-
								Pain	3.00	2.60	-13%	-	-
								Self Image	2.20	2.88	27%	-	-
								Function	3.20	3.60	13%	-	-
								Satisfaction	3.00	3.00	0%	-	-

At the bottom left, there is a radio button selection: All scores / Web scores only

Patient summary report

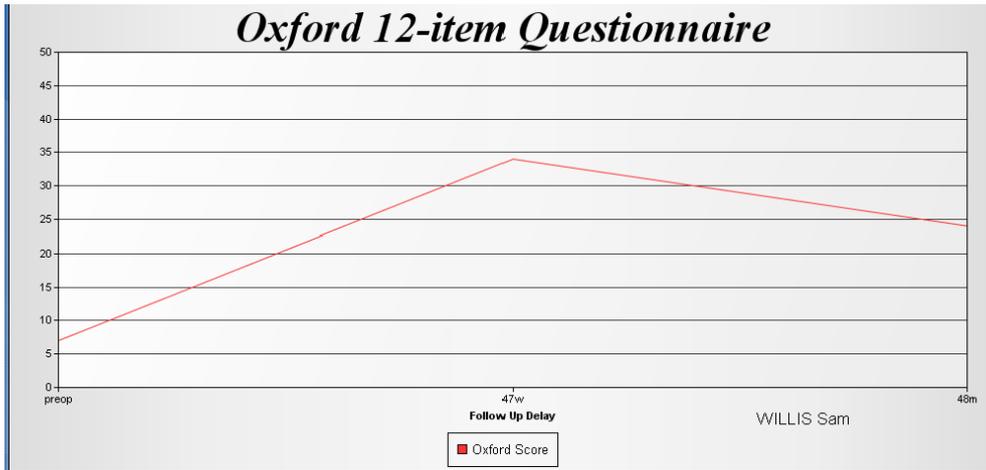
Module: Hip Arthroplasty | Protocol: Standard THR | Search: <Search details. If empty include all.> | Printer: [icon] | Select score dates: | 01/04/2011 to 02/04/2011 | Generate report: [button]

Mod	Protocol	Score	Patient	Surg Date	Side	Last Score Date	Follow-up period	Result name	Preop score	Latest score	% change	Prev score	% change
HA	Standard THR	Oxford	WILLIS, Sam	04/05/2005	R	04/05/2009	4y	Score	7	24	243%	34	-29%

Annotations:

- Users can enter a date range and see who had scores entered between a date range (pointing to the date range input).
- Simple reports show the score and % change between preop, current and the previous score - colour coded red if the score has deteriorated (pointing to the -29% value).

You can also still track the patient by going to the summary screen for each of their scores/s. This graph is accessed from the individual patients surgery screen, by score.

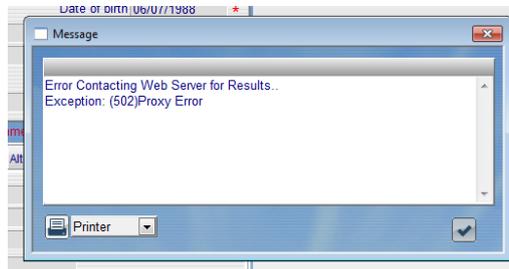


Protocol monitoring

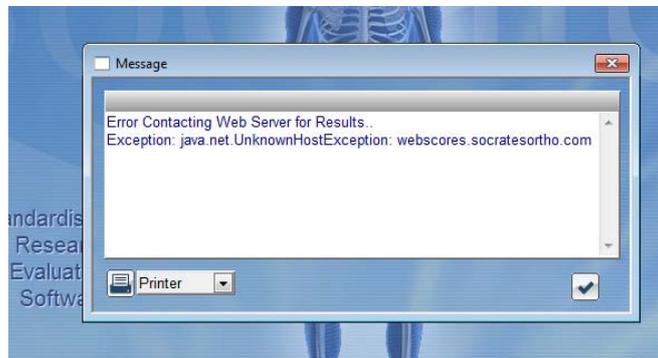
ERROR MESSAGES

Error contacting Web Server for Results

This error with the (502) Proxy error message is displayed when the connection to the server is lost. The company that hosts our server is a reliable provider but it is possible that there might be times that the server is down temporarily. This is normally not more than 5 minutes, and the program will try to send or receive scores automatically again.



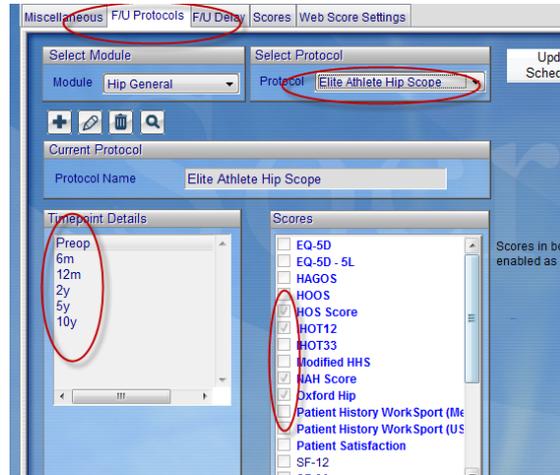
This error java.net error means that the program has lost its connection to the internet at the user end.



GETTING STARTED

Here's what you need to have done to get started.

- 1) Contacted Socrates Ortho and been given the user name and password, and instructions for how to set up your database to enable you to start using the service.
- 2) Protocols need to be set up with time points and scores if you want the scores to go out automatically. If this isn't done Socrates doesn't know what is due to send out, or when, you would have to use the manual method.



- 3) Each surgery needs to be web enabled, and the protocol selected. This can either be done at the time of setting up the surgery record, or on the history screen. You can also assign a group of existing surgeries to a protocol rather than adding them one at a time, see the section on protocol's



- 4) Each patient needs to have their method of notification set on the demographics screen. You can still use local score entry even if an email address is selected.



- 5) Once this is done you will be ready to send and receive scores/surveys to your patients, either using their email address, or local score entry.

You should now be ready to send out scores to the web server. This means patients can either receive an email or can log in from your office or clinic depending on what you have selected in the patient's notification window.

Dummy Run

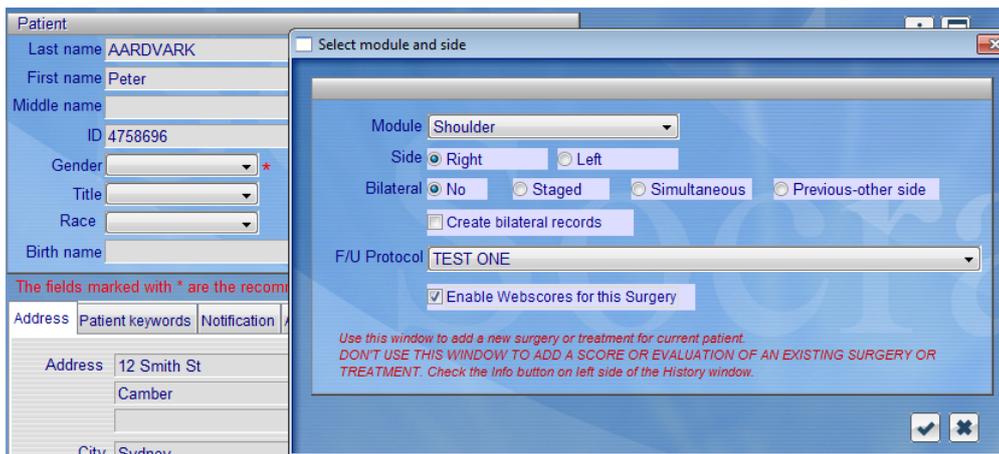
We are going to set up 2 test surgeries using the protocol method so you can trial the system before you start with real patients using yourself, or a staff member as dummy patients. This way you can check that the emails are being sent from the correct address and being returned into your copy of Socrates, and it will help you become familiar with the process.

- Set up a protocol as a test, it doesn't matter which module or score you choose. Add a score at a pre-op and one for a 3 month time point.
- Add 2 dummy patients, one with *Patient email* selected as the method of notification, the email address for this "patient" should be the address of the person who is doing the testing. For the other "patient" select *Don't send email* as the method

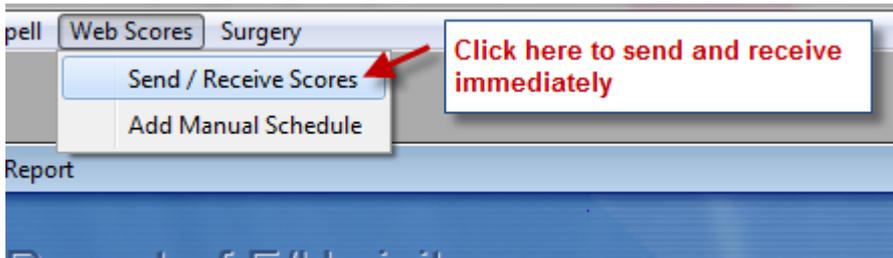


Using the email method

- Create a surgery record for a dummy patient with 'email' selected as the method of sending. Select the module that you created the protocol in, then select the test protocol and tick *Enable webscores*.



- You can now either wait until the next time the webscores send out the scores automatically (based on how you set this up in the Set Up screen, web score settings) or you can go to the "Webscores" dropdown menu at the top and select *Send and Receive* to send this score schedule to the web server.



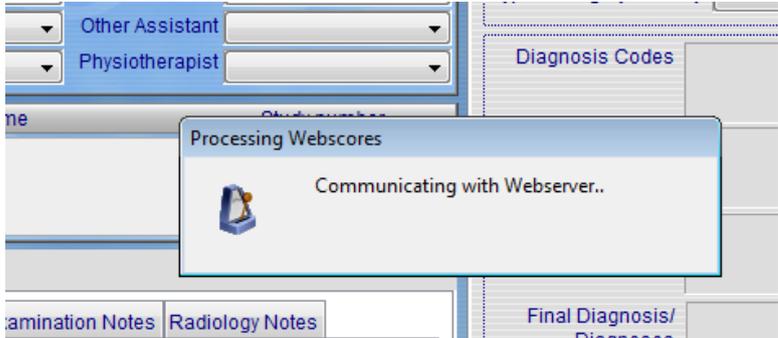
Once the message has gone out an email will arrive in your inbox at around one minute past the following hour - 'you' being the dummy patient.

- Click on the link in the email, fill out the responses and click SUBMIT to return the results to your Socrates program.
- You can either wait for the program to collect the results at the interval you have selected, or you can choose to collect the results manually by going to the "Webscores" dropdown menu at the top and select *Send and Receive*
- Once the results are in that patient's surgery record, check that the score/s you selected has been received as a pre-op score. If you are in the history screen where the scores are displayed for that patient you will need to go back a screen then re-enter that screen to allow it to refresh and to see the score. You can also check this by going to the Reports screen - Webscores sent, and tracking tab - and check that it is showing up as having been sent and received. Make sure that the scores you chose in the protocol are selected to be displayed on the history screen (do this in the Follow Ups and Scores tab in the Set Up screen), as they won't all fit on the history screen at once. Even if the score isn't selected to be displayed, if it was in the protocol and has been filled in the results will still be there, when you select to display the score you will see it.
- If you want to check that it will send out the 3 month score, you can now go to that dummy patient's surgery record and enter a date of surgery retrospectively 3 months prior to the current date. Note that it can be no more than 7 days either side of the date 3 months ago or it will be outside the range. i.e. if the current date is the 7th November you can enter a surgery date from the 1st to the 14th of August and the program will recognise that it is due to send out a score as it is now 3 months since the date of surgery
- Go through the steps from the top of this page to send and receive the 3 month score. Remember that the emails will only be sent on the hour. The results will come in almost immediately.

Using the filling in the clinic/office method – local score entry

Now you have checked that the email method works and all your details are correct, you can now run the other dummy patient through filling one in at the clinic scenario.

- From the history screen of the surgery you are using for testing, go to the dropdown menu "Surgery" at the top of the screen and click Local Score entry. If this has already been sent you won't have to do this. Remember that the surgery record needs to have a protocol assigned to it, and web scores enabled.
- The protocol will be sent to the web server (if it hasn't already been sent via the automatic process)



- When the page appears with the instructions, patients name, ID and password print it out or write it down, then log into the web server <https://webscores.socratesortho.com> and enter the ID and password. You should have bookmarked this address on the tablet or computer you are using to allow patients access to the web.

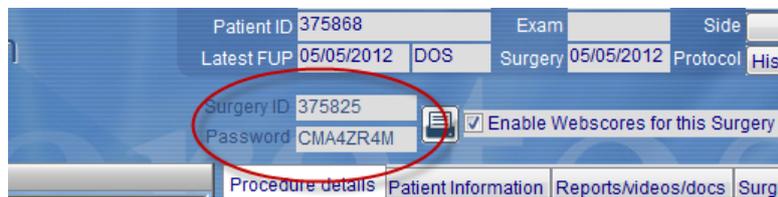


Socrates Webscore Patient Operation Login

Operation Id:

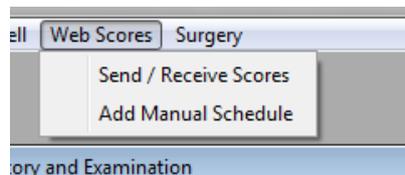
Password:

Fill in the responses and click SUBMIT. Go back to the steps on page 7 to receive, and to send out the 3 month score if you want to check the next time point. If the score had already been sent to the web server (you'll see the ID, password and print icon as below) you can just print the details from this print icon without using local score entry.



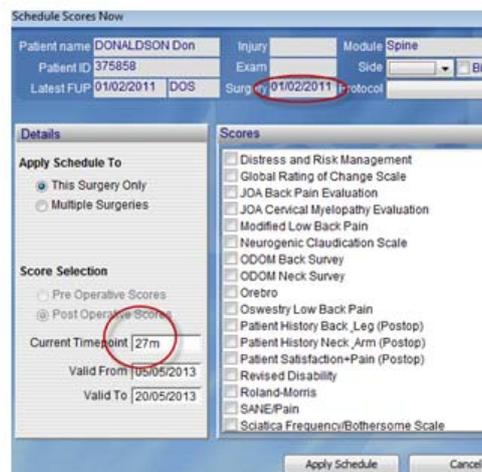
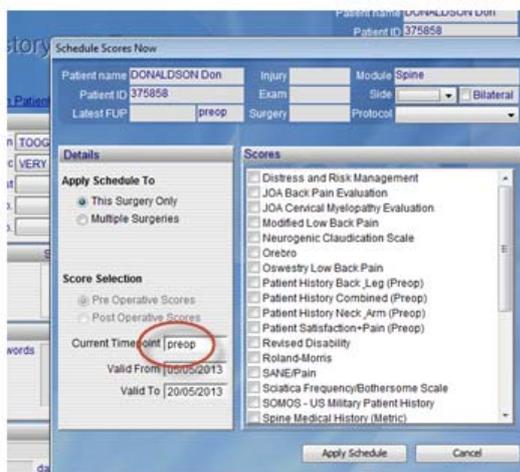
Using the manual method.

Try sending one of your dummy patients a score manually. Just go into that surgery select, Add manual schedule. The record doesn't have to be web enabled, it assumes this if you want to send a manual score. If there is no surgery date it will only allow pre-ops to be sent out, if there is a surgery date it will calculate the timepoint based on that date, and the current date.



PRE-OP

POST OP SENT 6TH MAY 2013, 27months POST OP



Once you are familiar with how the system works, you are ready to start using the system on your patients.

CHECK LIST TO GET STARTED

- 1) Make sure you are confident that you understand how it works.
- 2) Check with us that you have a version which is up to date enough to enable you to upgrade to the Web server version. You may need to upgrade in two steps and reinstall the program before you can run this web server version.
- 3) Set up an email address and senders Name dedicated to sending and receiving the emails to your patients. Make sure it's something the patients will recognise and won't send to the junk box.
- 4) Contact Socrates and arrange payment and the establishment of your web service account.
- 5) Set Up protocols. You need to read the section about protocols as the automated web service will only function if you have established follow up protocols for each module. This is how Socrates knows what scores and what time points to send out.
- 6) If you are going to be using the service in the clinic have the iPad's or PC's ready and able to connect to the internet. Bookmark this web address as a favourite.
<https://webscores.socratesortho.com> to save having to enter it each time.
- 7) Make sure that the machine which has the Socrates installation with the web score settings set up can connect to the internet.

FAQ'S

Could a patient log into someone else's surgery by mistake and enter their scores into the wrong surgery?

The mathematical likelihood of this is remote. The user name and password are a mixture of upper and lower case letters and numbers which are generated by a program inside the Socrates webscore database, specific to that surgery. The patient's name is also displayed on the link. There is a much higher likelihood of a bored data entry clerk manually entering a score into the wrong patient's record than this happening.

Are the scores/questionnaires and the instructions the original ones?

We have used faithful reproductions of the scores and where available, included the author's original instructions. Obviously some need to be changed from phrases such as "place a cross in the box" to accommodate electronic data entry.

What if the patient doesn't go on to have surgery or a procedure?

After the pre-op scores have been completed, nothing else will happen until a date of surgery or treatment is entered. If no date of surgery or treatment beginning is ever entered, the patient will not receive a further email nor can any more scores be completed online.

How can we be sure that our patient's results don't go into the wrong database?

When you are set up, we ask you to test the process on two dummy patients. This involves sending a test email and logging in online and completing a score to enable you to reassure yourself that the results are entered into your own database. Each user of the web service has their own unique user number on our server, once its set up, that doesn't change.

Can we stop using the system at any time?

Yes, if you notify us that you no longer wish to subscribe to this service we can remove the account from the web server database immediately. You will still have all the data on your database, you just won't be sending or receiving data from the webscores server any more.

Has the Socrates system been tested?

We have conducted extensive in-house and early beta site testing to ensure that the answers the patient selects on the screens are correctly returned to the user's database and the correct record. Early users are also doing their own testing.

Why is the Company Socrates Ortho Ltd mentioned on the main body of the email?

In order for us to become registered as a secure email provider, it's a requirement to make sure that the recipient can see that the email provider is genuine and has a physical address. Socrates Ortho is the company which owns the Socrates webscores.

Can the patient see what their score results are?

No, the patient only sees the questions, and is alerted if they have missed any. No feedback is sent to the patients by way of results, or colours, red, green, orange, etc, to indicate whether their answers are positive or negative, as we consider this could introduce bias or raise concerns.

How can we know if a patient is deteriorating if they are filling their scores in via email.

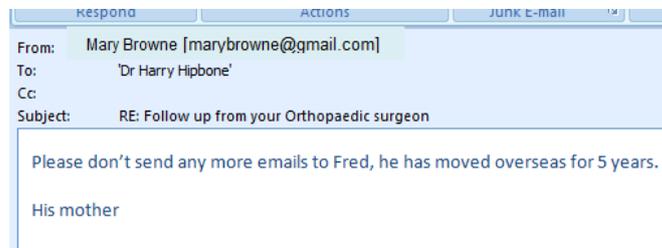
There is a patient summary report in Socrates which makes it easy for users to check patient scores and identify any who might be deteriorating. Or you can check their individual scores screens, the summary or graph. See the chapter on Reports.

What happens if the patient doesn't respond to the email?

A reminder email will be sent out after an appropriate period, depending on whether the follow up is due at weekly, monthly or yearly intervals. If the second email is not answered or the score is not completed, the patient will show up on the missing visit list and the webscores report will show that the request wasn't answered. The link will no longer be active once it's gone past the limits of the time allocated as the score being due. However, you can reschedule the ones that were not completed or are due in the future also, see page

Can the patient reply to the email and who would it go to?

Yes they can and a reply will be returned to the user's email. Nothing from the patient comes back to Socrates Ortho.

***Can the message in the email body be personalised for users?***

This will be possible in a later release - we'll let users know when this is an option.

Can the interface (Background) on the web link be personalised for users?

This will be possible in a later release - we'll let users know when this is an option

Can there be different sending email address for different surgeons in the group?

There can only be one email address per database, so if you are using the same database you will need to create one email address for the group.

WEB ENABLED SCORES

HIP GENERAL
AAOS Adolescent Health Assessment (Parent)
AAOS Adolescent Health Assessment (Self)
AQOL4D * coming soon
AQOL6D * coming soon
AQOL6D Adolescent * coming soon
GROC Global Rating of Change
HAGOS - Hip and Groin Outcome Score
Hamstrings Score
HOOS - Hip Dysfunction and Osteoarthritis Outcome Score
HOOS (PS) - Short Form
HOS - Hip Outcome Score
IHOT-12 (replaces MHOT 14)
IHOT-33 (replaces MHOT-33)
Lower Extremity Functionality Scale
Marx
Modified Harris Hip Score
Non Arthritic Hip Score
Oxford Hip Score
Pain and Normal Visual Analogue Score
Pain Catastrophising Score (PCS)
Patient Satisfaction, Normal, and Pain VAS Postop
Patient Satisfaction, Normal, and Pain VAS Preop
Patient Work & Sport PostOp
Pediatric Health Assessment (Parent)
Pittsburgh Sleep Quality Index
Promis 43
SOMOS - US Military Patient History
UCLA Activity
VAIL Hip Score
VAS Pain Score
Veteran Rand-12 General Health Survey
Veteran Rand-36 General Health Survey
WOMAC Hip Index

HIP ARTHROPLASTY
AAOS Adolescent Health Assessment (Parent)
AAOS Adolescent Health Assessment (Self)
AQOL4D * coming soon
AQOL6D * coming soon
AQOL6D Adolescent * coming soon
Ceramic Hip Noise Score
Forgotten Joint Score (FJS12)
GROC Global Rating of Change
Harris Hip Score
High Activity Arthroplasty Score (HAA)
HOOS - Hip Dysfunction and Osteoarthritis Outcome Score
HOOS (PS) - Short Form
Lower Extremity Functionality Scale
Oxford Hip Score
Pain and Normal Visual Analogue Score
Pain Catastrophising Score (PCS)
Patient Satisfaction, Normal, and Pain VAS Postop
Patient Satisfaction, Normal, and Pain VAS Preop
Pediatric Health Assessment (Parent)
Pittsburgh Sleep Quality Index
Promis 43
Reduced WOMAC
SOMOS - US Military Patient History
Tegner Activity Score
UCLA Activity
VAS Pain Score
Veteran Rand-12 General Health Survey

KNEE GENERAL
AAOS Adolescent Health Assessment (Parent)
AAOS Adolescent Health Assessment (Self)
ACL Knee Postop
ACL Knee Preop
AQOL4D * coming soon
AQOL6D * coming soon
AQOL6D Adolescent * coming soon
BANFF Patella Instability Instrument
Brittberg
GROC Global Rating of Change
Hamstrings Score
IKDC Paediatric
IKDC Patient
Knee Society Score (KSS)
Knee Society Score V2 2011 * coming soon
KOOS - Child
KOOS - Knee Injury and Osteoarthritis Outcome Score
KOOS (PS) - Short Form
Lower Extremity Functionality Scale
Lysholm
Marx
Modified Cincinnati Knee Score
Norwich Patella Instability Score
Oxford Knee Score
Pain and Normal Visual Analogue Score
Pain Catastrophising Score (PCS)
Patient Satisfaction, Normal, and Pain VAS Postop
Patient Work & Sport PostOp
Pediatric Health Assessment (Parent)
Pittsburgh Sleep Quality Index
Promis 43
Quality of Life Assessment in ACL Deficiency
SOMOS - US Military Patient History
Tegner
UCLA Activity
VAS Pain
VAS Pain Expectations
Veteran Rand-12 General Health Survey
Veteran Rand-36 General Health Survey
VISA Knee Score
WOMAC Knee
WOMET - Western Ontario Meniscal Evaluation

KNEE ARTHROPLASTY
AAOS Adolescent Health Assessment (Parent)
AAOS Adolescent Health Assessment (Self)
AQOL4D * coming soon
AQOL6D * coming soon
AQOL6D Adolescent * coming soon
Forgotten Joint Score (FJS12)
GROC Global Rating of Change
High Activity Arthroplasty Score (HAA)
Knee Society Score (KSS)
Knee Society Score V2 2011 * coming soon
KOOS - Child
KOOS - Knee Injury and Osteoarthritis Outcome Score
KOOS (PS) - Short Form
Kujala
Lower Extremity Functionality Scale
Lysholm
Oxford Knee Score
Pain and Normal Visual Analogue Score
Pain Catastrophising Score (PCS)
Patient Satisfaction, Normal, and Pain VAS Postop
Patient Satisfaction, Normal, and Pain VAS Preop
Pediatric Health Assessment (Parent)
Pittsburgh Sleep Quality Index
Promis 43
Reduced WOMAC
SOMOS - US Military Patient History
Tegner Activity Score
UCLA Activity
VAS Pain
Veteran Rand-12 General Health Survey

SHOULDER
AAOS Adolescent Health Assessment (Parent)
AAOS Adolescent Health Assessment (Self)
AQOL4D * coming soon
AQOL6D * coming soon
AQOL6D Adolescent * coming soon
ASES Rating Scale - Patient
Constant Score
DASH - Disabilities of the Arm, Shoulder and Hand Score
DASH Quick
GROC Global Rating of Change
L'insalata
MISS - Melbourne Shoulder Score
Oxford Instability Score
Oxford Shoulder Score
Pain Catastrophising Score (PCS)
Patient Satisfaction, Normal, and Pain VAS Postop
Patient Satisfaction, Normal, and Pain VAS Preop
Patient Work & Sport PostOp
Pediatric Health Assessment (Parent)
PENN Shoulder Score
Pittsburgh Sleep Quality Index
Promis 43
ROWE Shoulder Score
Sane (Normal) Pain Visual Analogue Score
Shoulder Activity Level (Current)
Shoulder Activity Level (Preinjury)
Simple Shoulder Test (SST)
SOMOS - US Military Patient History
Somos Active Duty Shoulder Score
Somos Biceps Functional Score
SPADI - Shoulder Pain and Disability Index
VAS Pain
Veteran Rand-12 General Health Survey
WOOS - Western Ontario Arthritis of the Shoulder Index
WORC - Western Ontario Rotator Cuff Index
WOSI - Western Ontario Shoulder Instability Index

GENERAL
AAOS Adolescent Health Assessment (Parent)
AAOS Adolescent Health Assessment (Self)
AQOL4D * coming soon
AQOL6D * coming soon
AQOL6D Adolescent * coming soon
GROC Global Rating of Change
Pain and Normal Visual Analogue Score
Pain Catastrophising Score (PCS)
Patient History Work & Sport PreOp
Patient Satisfaction, Normal, and Pain VAS Postop
Patient Satisfaction, Normal, and Pain VAS Preop
Patient Work & Sport PostOp
Pediatric Health Assessment (Parent)
Pittsburgh Sleep Quality Index
Promis 43
SOMOS - US Military Patient History
VAS Pain
Veteran Rand-12 General Health Survey
Veteran Rand-36 General Health Survey

ELBOW & HAND
AAOS Adolescent Health Assessment (Parent)
AAOS Adolescent Health Assessment (Self)
AQOL4D * coming soon
AQOL6D * coming soon
AQOL6D Adolescent * coming soon
ASES - American Shoulder and Elbow Society Score
DASH - Disabilities of the Arm, Shoulder and Hand Score
DASH Quick
GROC Global Rating of Change
Mayo Elbow
Mayo Wrist
Oxford Elbow
Pain and Normal Visual Analogue Score
Pain Catastrophising Score (PCS)
Patient History Work & Sport PreOp
Patient Satisfaction, Normal, and Pain VAS Postop
Patient Satisfaction, Normal, and Pain VAS Preop
Patient Work & Sport PostOp
Pittsburgh Sleep Quality Index
PREE - Patient Rated Elbow Evaluation
Promis 43
PRWE - Patient Rated Wrist Evaluation
Shoulder Activity Level
SOMOS - US Military Patient History
VAS Pain
Veteran Rand-12 General Health Survey
Veteran Rand-36 General Health Survey

FOOT & ANKLE
AAOS Adolescent Health Assessment (Parent)
AAOS Adolescent Health Assessment (Self)
AFAOS - Foot and Ankle Outcome Score
Ankle Fracture Score
Ankle Osteoarthritis Scale
AQOL4D * coming soon
AQOL6D * coming soon
AQOL6D Adolescent * coming soon
FAAM - Foot and Ankle Ability Measure
FAOS - Foot and Ankle Outcome Score
Lower Extremity Functionality Scale
Marx
Marx Activity Score
MOX Foot
Oxford Ankle Foot Questionnaire - Child
Oxford Ankle Foot Questionnaire - Parent
Pain and Normal Visual Analogue Score
Pain Catastrophising Score (PCS)
Patient History Work & Sport PreOp
Patient Satisfaction, Normal, and Pain VAS Postop
Patient Satisfaction, Normal, and Pain VAS Preop
Patient Work & Sport PostOp
Pediatric Health Assessment (Parent)
Pittsburgh Sleep Quality Index
Promis 43
Revised Foot Function - long
Revised Foot Function - short
SOMOS - US Military Patient History
Tegner Activity Score
UCLA Activity
VAS Pain
Veteran Rand-12 General Health Survey
Veteran Rand-36 General Health Survey
VISA – A Achilles tendon questionnaire

SPINE
AAOS Adolescent Health Assessment (Parent)
AAOS Adolescent Health Assessment (Self)
AQOL4D * coming soon
AQOL6D * coming soon
AQOL6D Adolescent * coming soon
Back & Leg Patient Survey PostOp
Back & Leg Patient Survey PreOp
DRAM Distress & Risk Assessment
GROC Global Rating of Change
HOOS - Hip Dysfunction and Osteoarthritis Outcome Score
Japanese Orthopaedic Association Back Pain Evaluation
Japanese Orthopaedic Association Cervical Myelopathy Evaluation
Military Specific Patient History
Modified Harris Hip Score
Modified Low Back Pain Disability Questionnaire
Neck & Arm Patient Survey PostOp
Neck & Arm Patient Survey PreOp
Neurogenic Claudication Outcome
ODI - Oswestry Disability Index
ODOM Back
ODOM Neck
Orebro Musculoskeletal Pain Questionnaire
Pain and Normal Visual Analogue Score
Pain Catastrophising Score (PCS)
Patient Satisfaction, Normal, and Pain VAS Postop
Pediatric Health Assessment (Parent)
Pittsburgh Sleep Quality Index
Promis 43
Revised Disability Index for Low Back Pain/Dysfunction
Roland-Morris Back Pain and Disability Score
Sciatica Frequency and Bothersome
SOMOS - US Military Patient History
Spine Combined LITE - POSTOP
Spine Combined LITE - PREOP
Spine Medical History
Tampa Scale for Kinesiophobia
VAS Back & Leg
VAS Neck & Arm
Vernon Moir Neck Disability Index
Veteran Rand-12 General Health Survey
Veteran Rand-36 General Health Survey
Zurich Claudication Questionnaire