



## What's New in Socrates – General changes

This describes what's new since Version 9603. If some of you are updating from an older version please go to the website and read the "What's New" document up to the 9603 release then read this one.

This is a major new release rather than an update so please take the time to read through what's new. We've split the changes into this General changes document which affect users of all modules, then the specific modules. Please read what's relevant to you. The update itself won't take more than a minute or so to run but the **first time you log into your database** it may take **A LONG TIME** to convert and update. If you have several thousand records it could take several hours. So we recommend that you run the update late one afternoon then log in to Socrates and leave it updating overnight, or on a day that you aren't using it. Make sure your computer isn't set to go to sleep if you run it overnight. Don't leave it until just before you want to start using it... If you are forwarding the link to an IT person to run the update make sure you coordinate with them so that they don't run it when you need it straight away.

**Instructions** – please read the update instructions or send them to your IT person if they are running the update.

**BUGS** - we've done our best to test it but we know that some will have got past us since there are so many new features. The rule of thumb for software is that once you have more than 1000 lines of code you'll have bugs lurking and we have more than 200,000. Please tell us if something is misbehaving, or you can't do something that you think you should be able to. We can't fix it if we don't know about it.

### Here's what's new.

**New Databases** – As well as Socrates running on the current Omnis database we now support PostgreSQL or MSSQL. If you don't know what these are just ignore it and things will continue as normal unless we point out any differences in this document. If you want to know more or want to swap your database to one of these contact us.

**LOG IN** – when you log in now it will take a few seconds longer and give you a message about building database tables. We can't avoid this, it's a side effect of supporting 2 new types of databases.

**Password** – if you are still using admin admin you may have to use admin **A**dmin (upper case A) Try the old one and see if it's OK, if not use Admin for password. It's a good idea to change this if you are still using admin – go to the Set Up, User management - add new user.

**Password and User access rights** – we've made changes here to comply with the updated privacy and HIPAA rules and to accommodate the sites where there are multiple users on the same database. All new users passwords now need to include 3 of the 4 following - upper case, lower case, numbers or characters. The database administrators can also now limit user's access to the export and search functions if they choose and enable only certain users to access selected surgeons data. Read the Administration/security section of the "Set Up" chapter of the manual for more details.

### **Synching from master to mobile.**

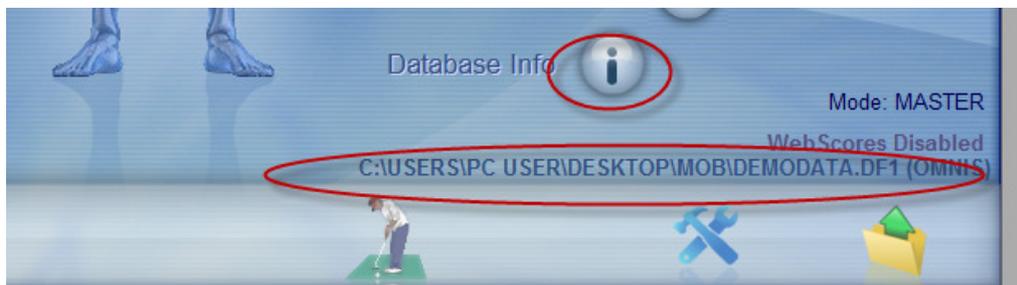
There are some changes here also. You now need to be logged into your file to be able to synch between files. Read the attachment - **Synching changes**.

**New Modules** – there are 3 new modules, Foot and Ankle, Spine, Elbow and Hand. These modules are not yet complete in that they don't have specific surgery details but most of the commonly used scores are included in scannable forms and will be web enabled. See the section in the manual for more detail about each module. Go to the Set Up Screen to enable these modules if you want to use them.

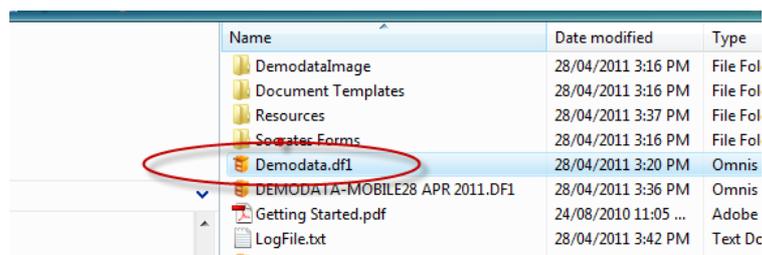


## Backing Up

If you use the "file Duplicate" function to back up your database manually this is no longer an option. You will now need to locate the Omnis datafile and copy it manually. To do this look on the front of the program, or in the info section on the home screen for the path to the database.



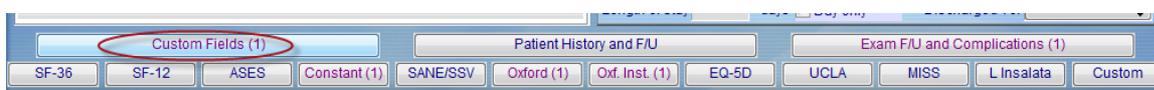
Then go to this location and you will see a file that looks like an orange filing cabinet, with the name of your database. Just use the copy and paste function to copy it to your back up location. You can't copy it if you have the Socrates program open.



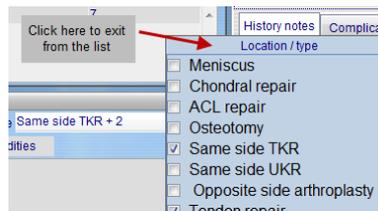
## Opening into other databases.

If you are using more than one database the method of switching between them has now changed. See page 35 of Chapter 3 of the manual.

**Custom Fields** – these have moved from inside the surgery record to the history screen above the scores so it's now possible to access this screen without going into the surgery screen.



**Multi check boxes** – you can now exit these by clicking on the title bar at the top.



**New back to home icon** – we have added a new icon which will return users from anywhere in the program back to the first screen for the current patient, another click will then return you to the first patient in your database. It will also return you to the first patient in the main database if you are scrolling through a subset after a search.



**Manual and forms icon** – These allow direct access to the web site for the latest copy of the manual and forms. They are on the home screen and other screens where access to the manual might be useful.

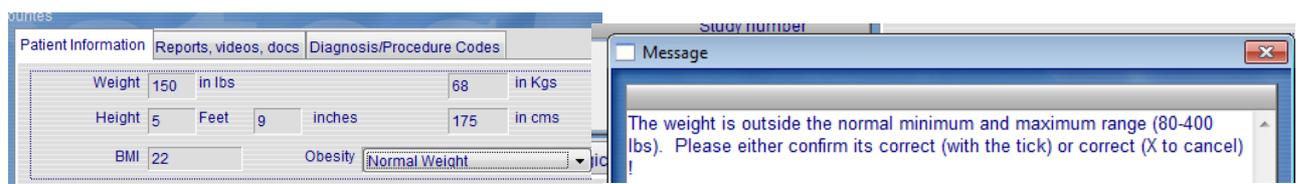


### Scan Forms

These have all been redone and are labelled with V3.1. Your old ones might still work but we strongly recommend that you start by downloading all new ones from the link above or printing them directly from the screen of the score if your printer prints them correctly. If you have a backlog of old ones yet to be scanned you can either wait until they are all used up and then run the update. Or make sure you check the first few to see that they still scan accurately particularly the VAS 0 -100 ones. Most should be OK but you should check. Don't print out any old ones from any remaining pdf's you might have saved. Delete any folders you might have with the old forms. Rather than keep the copies locally its better to use the web to access the, when we find typos etc from time to time we regularly update them here.

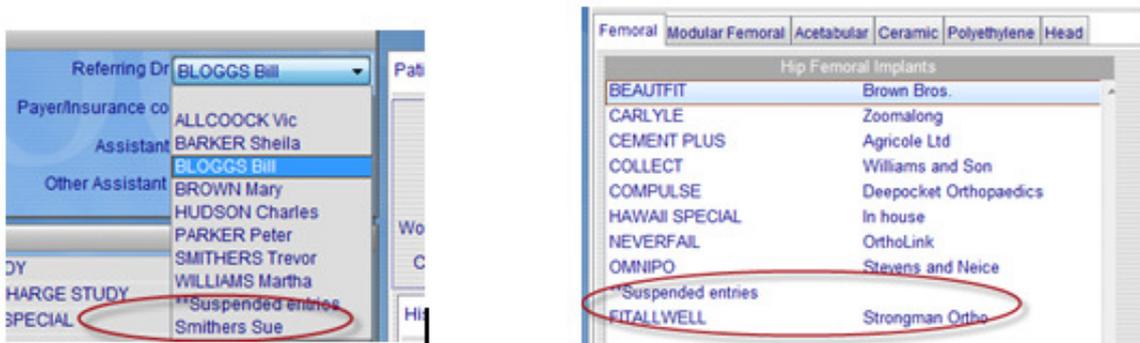
### Height and Weight format

We've changed this to be easier for the US format and also added a warning if the numbers seem too high or low to help eliminate data entry errors. Note that these are stored in the metric format.



**Suspended fields** - we've added a feature which will enable users to suspend some fields so they appear at the bottom of the list as inactive. This is useful if a surgeon or assistant is no longer working, or an implant isn't used any more. You shouldn't ever delete these as you need the records

for searches and stats. If suspended they appear at the end of the list but are still available for searching and statistics. It's enabled for all the fields below, as well as implants.



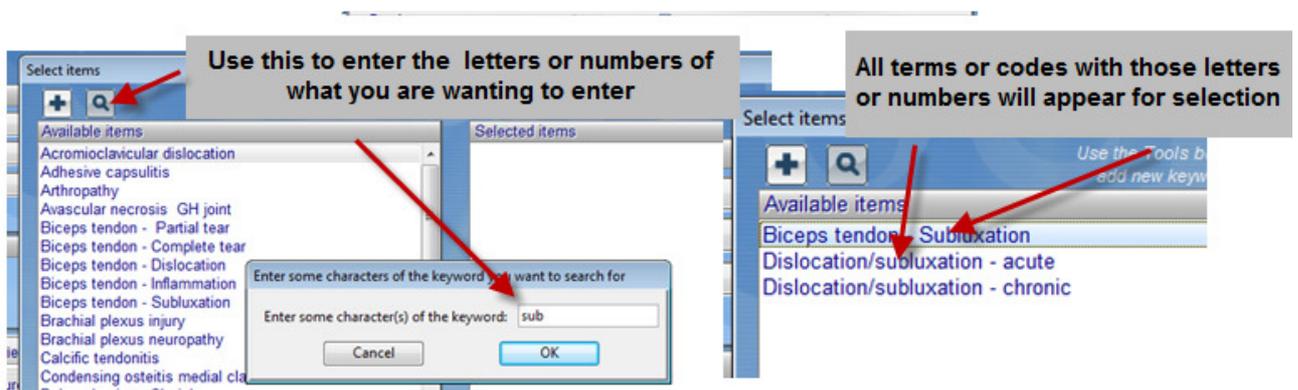
**Surgery screen** – if there is data entered in the surgery screen you will see the little red Y.



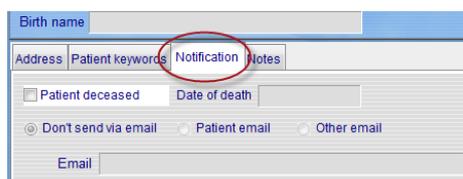
**Other assistant:** Added an extra field for this also.



**Searching for codes and Adaptable fields** The new search icon can now be used to type in all or part of your word or code so you can locate them quickly.



**Notification tab:** This tab is set up to let the program know where to send out the web scores when this service gets underway. More about this later as this service becomes released to everyone.



**Deceased** – There is a new field on the demographic screen to record details if a patient has died. This will automatically be entered onto the complication screen as below for any of the surgeries entered for this patient. They will also be deleted from any follow up protocol and due visits. The current age of the patient will also disappear from the demographic screen if they are deceased.

The image shows two overlapping software windows. The top window is titled 'Patient' and contains fields for: Last name (HAMPTON), First name (Gary), ID (4566), Date of birth (05/06/1944), and Gender (Male). A red asterisk and the word 'Deceased' are next to the last name field. Below this is a 'Patient keywords' tab with a checked box for 'Patient deceased' and a 'Date of death' field containing '02/01/2011'. The bottom window is titled 'Outcome' and has a checked box for 'Patient is deceased' and a 'Date of death' field containing '02/01/2011'.

**Protocols** – It’s now possible to add the scores you want at the time points you want to recall your patients for follow up. This will become more important when the web based patient data entry is activated as this is how the program “knows” what scores are due for completion and when to send out the relevant questionnaires.

The image shows a software window titled 'Protocol Name' with the value 'THR primary'. It is divided into two panes. The left pane, 'Timepoint Details', lists 'Preop', '6m', '2y', and '5y'. The right pane, 'Scores', has a list of checkboxes for various scores: EQ-5D (checked), HHS (unchecked), HOOS (unchecked), Oxford Hip (checked), Patient Satis+VAS (checked), SF-12 (unchecked), SF-36 (unchecked), UCLA Activity (checked), and VAS Pain (unchecked).

**Complications screen** – We’ve added fields for Intraop, Early or Late complications. If a date is entered the weeks from the date of surgery will automatically calculate, and the appropriate box will be checked. If the date isn’t entered these can be checked on their own. Date of revision and reoperation has also been added, and time since surgery will also be calculated. We’ve also rearranged the screen to flow better and added a complication history screen for each surgery.

The image shows a software window titled 'Complications and outcome status'. It has several input fields: 'Complication occurrence' set to 'Yes', 'Intra op' (unchecked), 'Early' (unchecked), and 'Late' (checked). Below these is a 'Date' field with '20/09/2010' and '119 weeks'. A list of complications includes 'Bone graft collapse - extrusion'. At the bottom, 'Reoperation' is set to 'Yes' with a date of '01/02/2011' and '139 weeks since op'. 'Revision' is set to 'No' with an empty date field. In the background, a table titled 'Complication History' is visible.

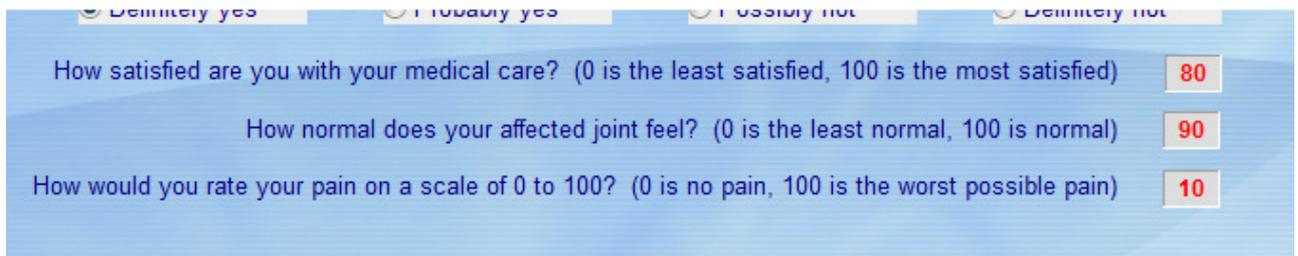
F/Up	F/Up Date	Occurrence	Re-Op	Revision	Adv event	Date	Delay wk	Complications
13w		Yes		Yes		07/07/2008	4	Component breakage;
33m	04/03/2011	Yes	Yes			20/09/2010	119	Bone graft collapse - extrusion;

**Search function** – this has been rewritten, it’s faster and easier to use. If you are at the stage of using this function please go to the manual and read the Search chapter or contact us to help get you started. Note that to be consistent with the rest of Socrates you now have to click the Add or modify icon before you add a new search name or run a search. You might also find that some of your saved searches don’t work anymore, apologies for that but we had no choice. If they are behaving oddly just delete that search and redo it.

**Blood Loss and anaesthetic time** – added this to the surgery details on the relevant screens.

**Patient history questions** - We've added 3 more fields for the sports medicine modules, *Are you covered by insurance*, *Is litigation pending* and *How many weeks have you been unable to work due to your injury*.

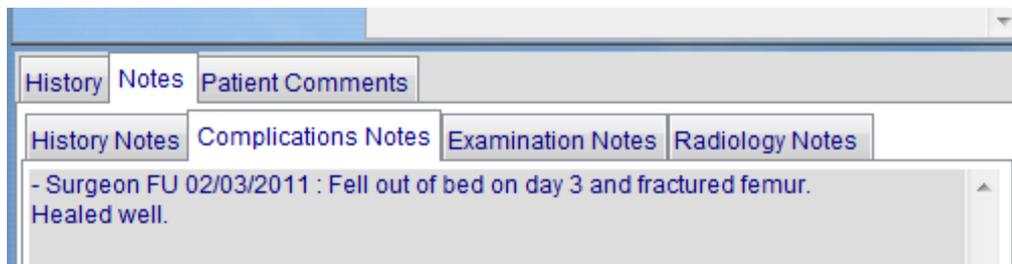
**Patient satisfaction survey** – we have added 2 more VAS questions as below. Also note as a result of feedback from users and to be consistent with other published normal scales we have reversed the "normal" values so that 0 is now least normal, plus it is now out of 100 not 10. Your existing data has been converted so that if the previous response was 3/10 (which would have been 70% of normal) will now be 70. **DON'T** use any of the old scan forms, they will give you the wrong results. You will need to enter any that you have manually. This is also now a scannable form.



The screenshot shows a survey interface with four radio button options at the top: "Definitely yes", "Probably yes", "Probably not", and "Definitely not". Below these are three questions, each with a score in a red box:

How satisfied are you with your medical care? (0 is the least satisfied, 100 is the most satisfied)	80
How normal does your affected joint feel? (0 is the least normal, 100 is normal)	90
How would you rate your pain on a scale of 0 to 100? (0 is no pain, 100 is the worst possible pain)	10

**Notes:** we have put a notes summary on the history screen so notes entered anywhere in the program will be displayed here. They can also be edited here and will be populated into the respective notes section elsewhere in the program and vice versa. The notes can also be exported, and added to your custom made reports. The patient's comments can be used to add anything that the patient might have written that you want to record. In future there will be a patient comments screen on the web scores that can be sent out as a web based "survey" if required so the patient can enter any comments on line. This is where it will appear in Socrates.

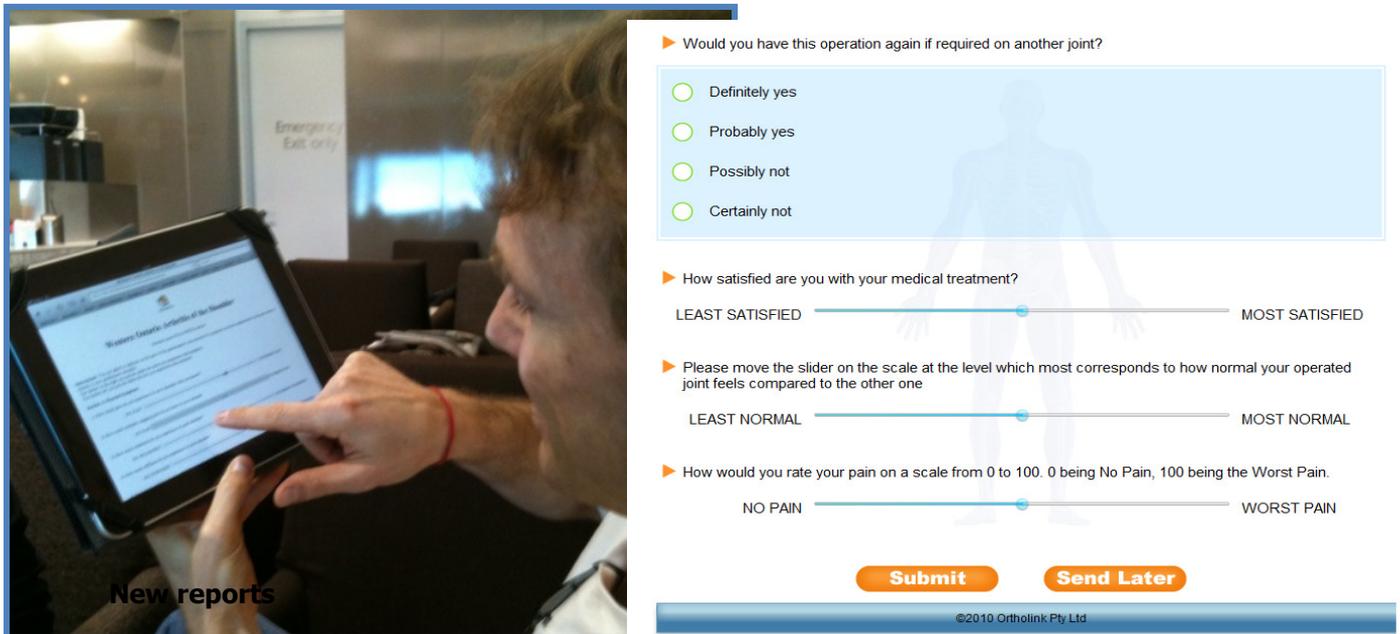


The screenshot shows a software interface with a tabbed menu at the top containing "History", "Notes", and "Patient Comments". Below the "Notes" tab, there are sub-tabs for "History Notes", "Complications Notes", "Examination Notes", and "Radiology Notes". The "History Notes" sub-tab is active, displaying a list of notes:

- Surgeon FU 02/03/2011 : Fell out of bed on day 3 and fractured femur. Healed well.

## **What's coming:**

Web scores: We know, it seems like they have been coming forever but they are in the final stages of testing. Here's a picture of a patient using an iPad to enter a score, and a section of the screen that the patient will see on the screen. If you'd like more information about how it will work just ask us. Otherwise once it's ready for general release you'll hear from us.



There are 5 new reports in progress.

- 1) A protocol summary so you can see your results in that group vs. the preop scores.
- 2) A missing visit summary so you can check on who has missed their visits and when.
- 3) A patient summary which will show who has had scores entered between a chosen date range, and how they are doing compared with their preop and previous scores. If they are deteriorating they will show up in red.
- 4) A complication summary - choose a date range and all complications between that date range will show up or use the selection to select sub groups.
- 5) An audit report, a quick way of seeing how many procedures have been done by which surgeon, and between selected date ranges.

## **Word processing/report generating**

The new word processing function is well on its way to being finished, we know a lot of you are waiting for it and we're working as fast as we can. This is 3<sup>rd</sup> party software that we have bought and are integrating into Socrates.

## **Saving your statistics**

We are working on a method to allow you to save the stats that you run routinely the same as you can save your searches.

***Thank you to those of you who take the time to give us suggestions and feedback to help us make Socrates better.***