

## What's new in Version 3.5



### **We based score entry for patients.**

Yes, it's finally here. Patients will be able to enter their scores either at home by email, or online in the clinic and they will come directly back into your copy of Socrates. More than 65 scores have been activated for this service for all modules. This is only available in English at this stage. There is an initial set up fee and an annual fee per surgeon user for the service, which is in addition to the maintenance fee for keeping up with the updates. Contact us if you are interested and we will send you all the details.

### **Licenses needed for some scores**

*Oxford Hip, Knee, Shoulder and Paediatric ankle scores, Oswestry Spine, VA RAND 12 and 36, EQ5D*

These scores require a license to use them. If your research is not funded by a commercial organisation there will probably not be a fee but you do need to register your use with the licensors. The first time you click on these scores in the updated version you will see a window displayed with details of how to obtain a license. Please do the right thing and contact them for a license if you haven't already done so.

Oxford 12-item Shoulder

Latest FUP 10/07/2011 DOS Surgery 10/07/2011 Protocol

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Method of

Oxford Licensing Requirements

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**Please do the right thing for yourself and your fellow users.**

By clicking on the OK icon you confirm that you have accepted these conditions, and agree that you either have an existing license, or will obtain one.

OK

During the past four weeks

1. How would you describe your shoulder?
2. Have you had any trouble with your shoulder?
3. Have you had any trouble with your shoulder using public transport?
4. Have you been unable to do any of your usual activities?
5. Could you do the things you would like to do?
6. Could you carry a tray?

*SF 12 and 36.* You should have received an email from us about these scores. It is no longer possible to enter the responses, only the scores which you can calculate using the scoring software obtained directly from the licensors. [www.qualitymetric.com](http://www.qualitymetric.com) The Veteran's Rand 12 and 36 scores which are almost identical have been added in place of these- see page 2.

## **New Scores**

We have added the following scores

**Shoulder :** Penn, SPADI, Instability Severity score, Flex 36

**Knee General:** ACL QOL score, WOMET meniscal tear

**Hip General:** Vail Hip score, HAGOS - Hip and groin pain

**Foot and Ankle:** Oxford foot and ankle children score, MOXFQ score.

**Spine:** JOA cervical and back pain, VAS Back and neck pain scores with 3 pain questions for each.

**All modules:** GROG, Global rating of change - asks the patient if they are the same, better or worse.

**SOMOS** – A patient history for US military patients.

**Preop Patient satisfaction with care, normal and pain VAS score.** These are the same 3 questions that are on the patient satisfaction questionnaire but have been added as a preop only score. The 5 additional questions on the existing one relate to post op satisfaction only and are still there with the 3 VAS ones as well but as a post op score only.

**Veterans RAND 12 and 36.** These are replacements for the SF 12 and 36. Click here for further explanation. [http://www.herc.research.va.gov/resources/faq\\_a07.asp](http://www.herc.research.va.gov/resources/faq_a07.asp)

Note that in this release the responses are stored but neither will give you a total score. We are still working with the group to develop the correct scoring algorithms. In the next release any data that has been previously entered with no score will automatically be scored.

Details to contact for permission to use are: Department of Health Policy and Management, Boston University School of Public Health: Anna Tobin [aitobin@bu.edu](mailto:aitobin@bu.edu)

Note that there are too many scores to all display on the screens, you need to go to the Set Up screen and select those that you want use. You can always change it at any time. If too many are selected you will see a message telling you this and they will appear all squished up on the screen.

**Scan Forms** – you will now receive a message telling you which question number is missing or ambiguous.

### **Alternative contact**

We have added a new tab to the demographic screen to enable users to record alternative contact details for the patient.

Address	Patient keywords	Notification	Alternative Contact	Notes
Last name	ADAMS	Title		
First name	Mary			
Relationship	Mother			
Address	33 Serene Ave			
City	Portland	State	Oregon	Post Code
			58679	
Phone #	456 4980776	Cell Phone	506 6785678	
Email	madams55@gmail.com			
Notes	Mother has lived there for 30 years. Patient is going travelling but is happy to be contacted via his mother.			

### Additional details for demographics

We've added a separate line for middle name, and a drop down list for race. If there is a race missing for your country let us know. Existing entries with both their first names in the original first name field can only be changed manually.

Patient	
Last name	MILLETT *
First name	Tom * Initials TM
Middle name	Murray
ID	675858 *
Date of birth	05/06/1977 *
Gender	Male *
Current Age	34
Title	
Marital status	
Race	Caucasian
Birth name	

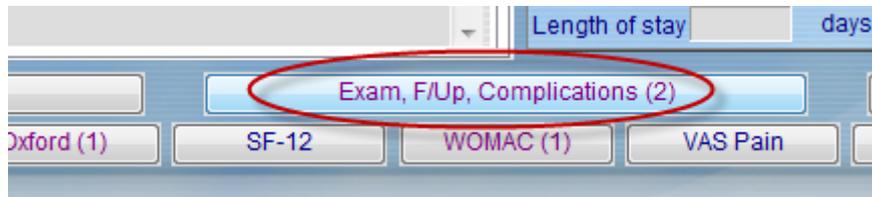
### Adding, selecting or modifying a patient.

You can now just click on the first letter - S,M,N or C - Mac users,

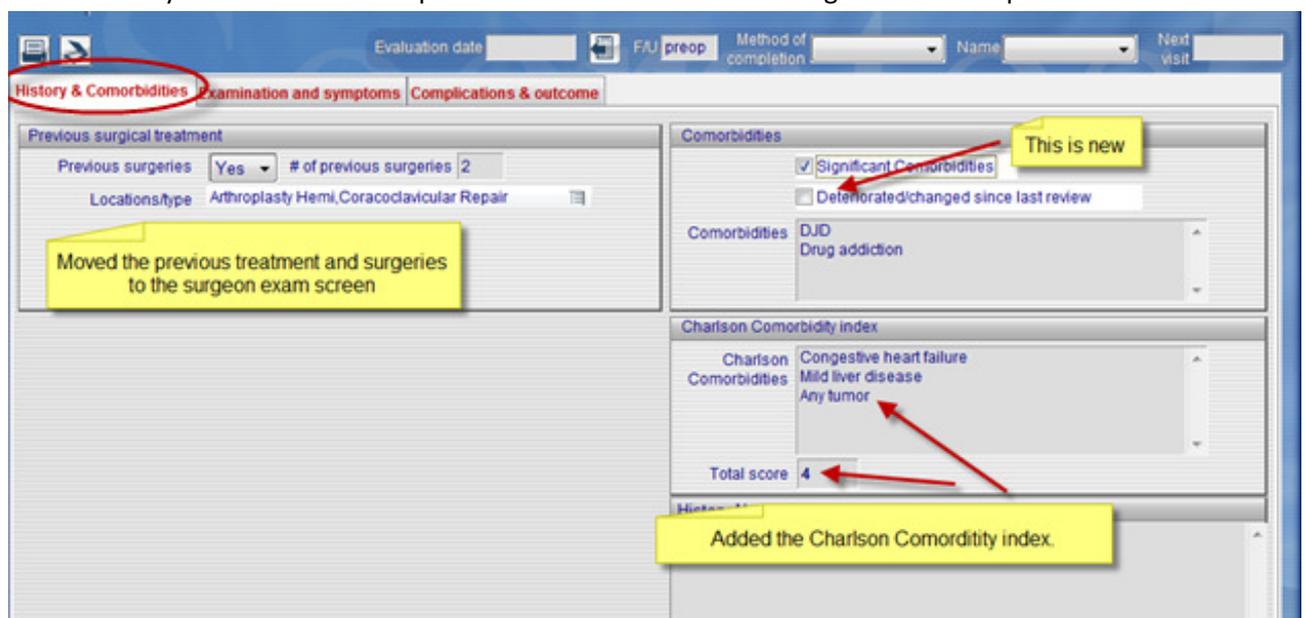
Lastname	ID	Birth Name	Firstname	Gender	Date of birth
BROWN	657583		Fred	Male	02/03/1944
BROWNING	675342		Barry	Male	04/08/1959

## History screen

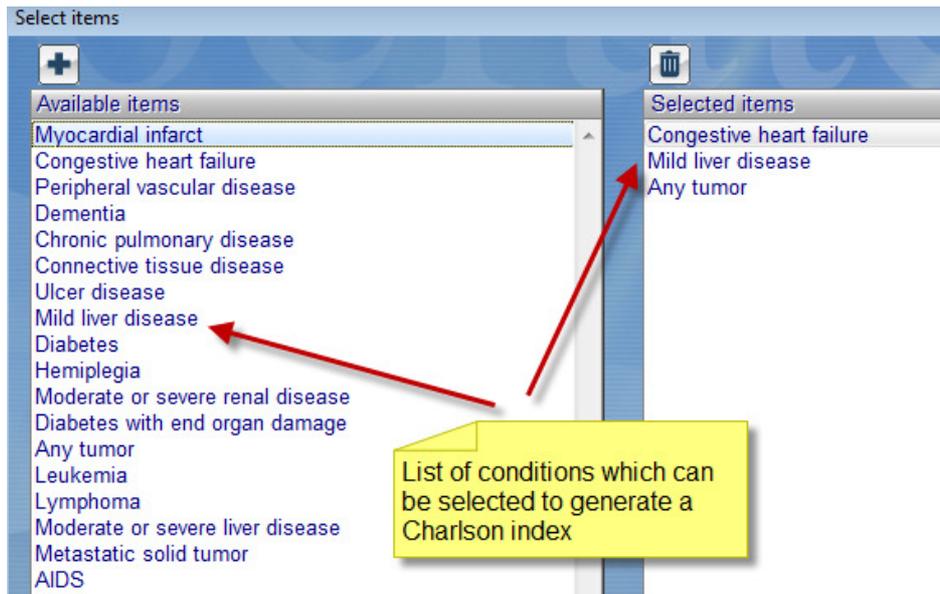
We have made some quite big changes here. It made sense to have everything to do with the surgeon examination and history in the same place so we've moved the previous treatment details to the Surgeon Examination screen and created a new tab inside that for history and comorbidities.



We also moved the comorbidities to this screen as these can change over time, plus we added a check box so you can record if the patient's comorbidities have changed since their previous visit.



**Charlson Comorbidity index** - We have added the Charlson Comorbidity index. This is a list of conditions and diseases which have been allocated points, if they are selected the program will calculate the appropriate score. One US spine study of 578 patients undergoing anterior cervical discectomy reported that 11.3% had an index of 5 or more. This equated to an additional cost of \$11000 in hospital costs and they concluded that an index of  $\geq 5$  was a powerful indicator of substantial increased costs of a spine procedure. It would also be relevant for patients undergoing arthroplasty procedures, less so for the sports medicine population.



### Lists

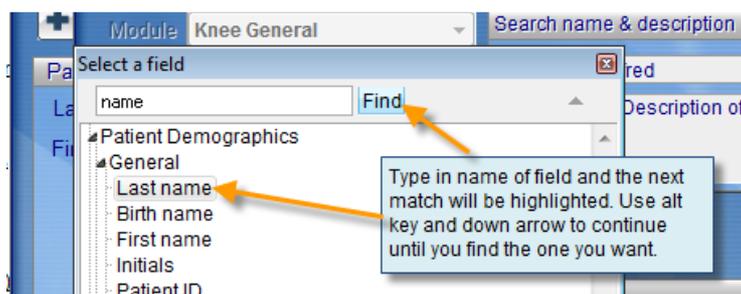
To return to the main surgery or patient list from one of the patients you have selected you can now select and hold down on the ALT or Option (Mac) key, then click on the search icon and you will be returned to the patient list without having to run it again.

Double click on any entry from this list to view all details for it. To return to this same list after viewing the surgery, hold the ALT key down (or OPTION key on a MAC) and click on the Search button again.



### Search changes

A find function added to search to facilitate finding your search list name.

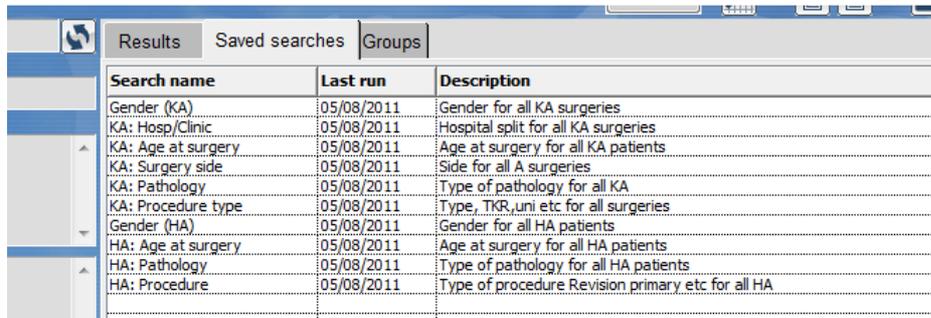


We have done a lot to this function to improve the speed and the flexibility and it is possible that **some of your old saved searches won't work**, and will need to be resaved. If you are having trouble check to see that there isn't an error recorded – if so, delete that search and resave it.

Data field	Operator	Text or value
KA:Surgery date	greater than or equal to	01/06/2006
	AND	
KA:Surgery date	less than or equal to	31/12/2010
KA:Femur Brand	equal to (is)	GLOBAL RBK
<error>KA:Surgeon FU Complication occur	equal to (is)	Yes

## Statistics changes

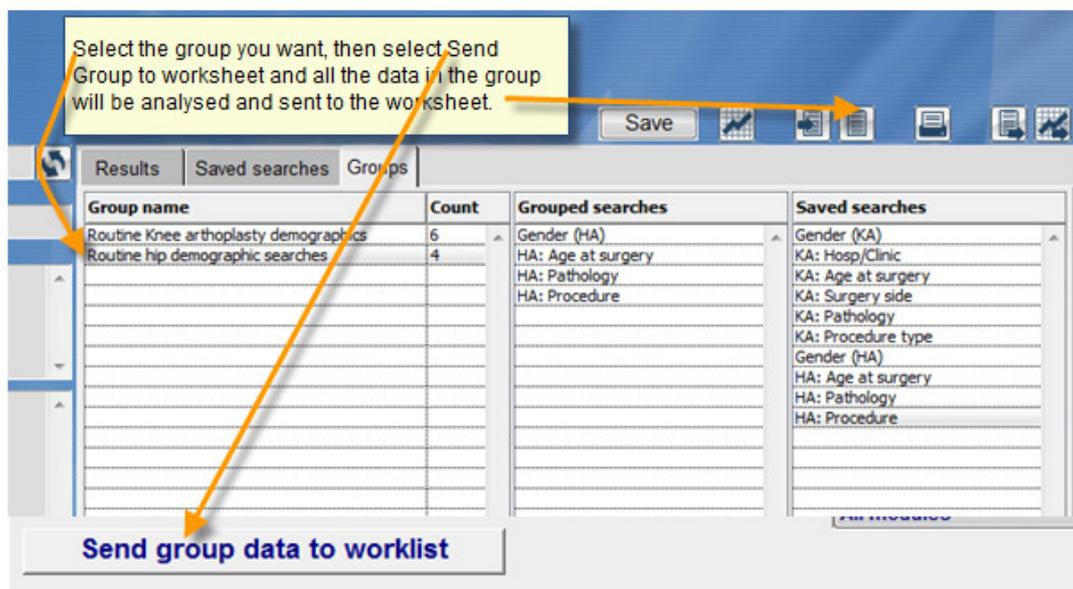
It's now possible to save the statistics that you run routinely. For example every 6 months you might want to see the same data for your most current dataset, average age of patients in a sub group, gender breakdown, preop knee scores etc. You can now save these as either individual searches/stats as well as group them together and run them all in one group search without having to reselect each one each time. The example shows a list of statistics searches that have been saved.



Search name	Last run	Description
Gender (KA)	05/08/2011	Gender for all KA surgeries
KA: Hosp/Clinic	05/08/2011	Hospital split for all KA surgeries
KA: Age at surgery	05/08/2011	Age at surgery for all KA patients
KA: Surgery side	05/08/2011	Side for all A surgeries
KA: Pathology	05/08/2011	Type of pathology for all KA
KA: Procedure type	05/08/2011	Type, TKR, uni etc for all surgeries
Gender (HA)	05/08/2011	Gender for all HA patients
HA: Age at surgery	05/08/2011	Age at surgery for all HA patients
HA: Pathology	05/08/2011	Type of pathology for all HA patients
HA: Procedure	05/08/2011	Type of procedure Revision primary etc for all HA

Groups - the saved searches can then be put into a group and the whole group can be run in one click and saved to a worksheet. The next example will run the Gender, age at surgery, pathology and type of surgery with just one click.

Please read the Statistics chapter in the manual for more details.



Select the group you want, then select Send Group to worksheet and all the data in the group will be analysed and sent to the worksheet.

Group name	Count	Grouped searches	Saved searches
Routine Knee arthroplasty demographics	6	Gender (HA)	Gender (KA)
Routine hip demographic searches	4	HA: Age at surgery	KA: Hosp/Clinic
		HA: Pathology	KA: Age at surgery
		HA: Procedure	KA: Surgery side
			KA: Pathology
			KA: Procedure type
			Gender (HA)
			HA: Age at surgery
			HA: Pathology
			HA: Procedure

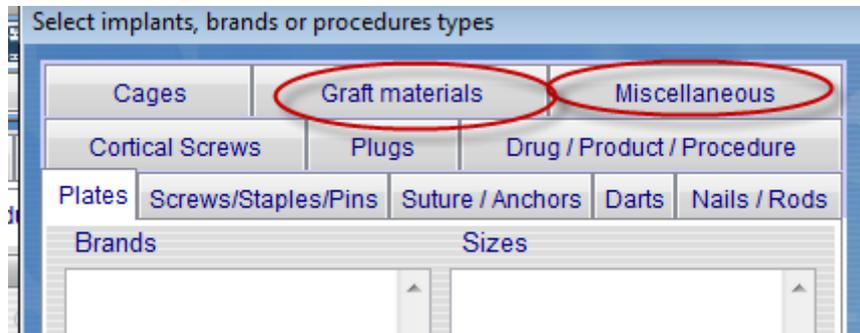
**Send group data to worklist**

## Word Processing/Reports writing feature

This has been completely rewritten. Unfortunately none of your previous templates will function, there was no way we could avoid this as its 3<sup>rd</sup> party software and it can't communicate with the previous one. The easiest way to reproduce them is to print out the old templates, or a screen print before you run the update, it will be easier to redo them if you have a copy at hand. Please read the chapter in the manual on Word Processing/Reports for more details.

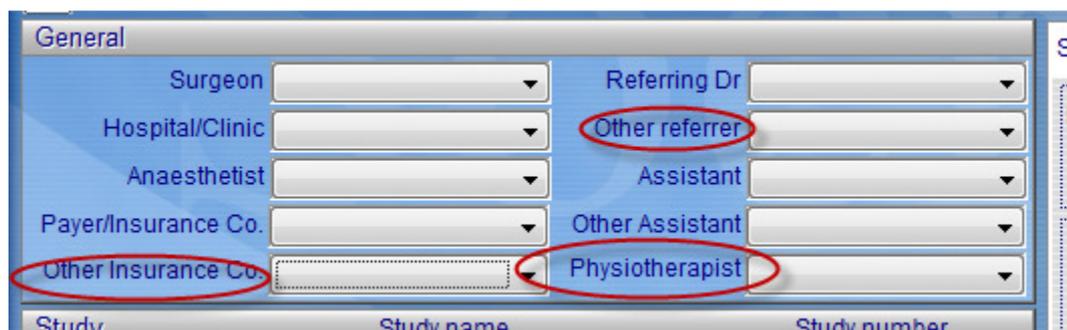
## Additional implants

There are 2 new tabs here. Graft materials can be for storing bone grafting materials, both biological and metal as well as augmentation materials, mesh, synthetic bone graft, etc. Miscellaneous can be used for anything that doesn't have a home elsewhere; an example could be the blood bank source.



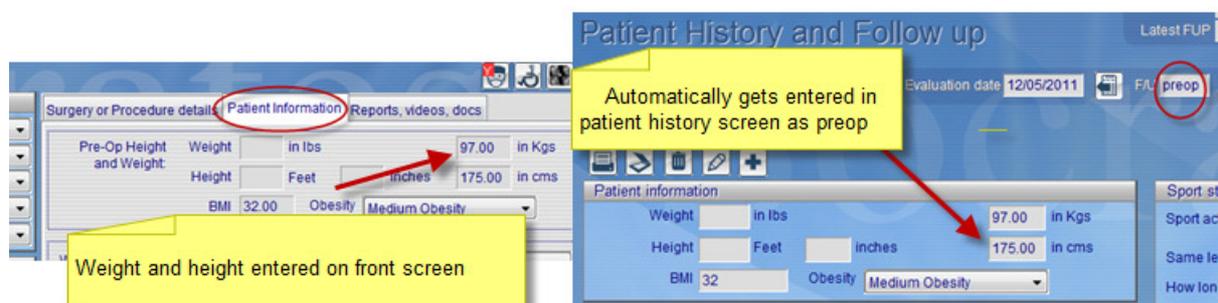
## New fields on history screen

We've added a new field for other or secondary referrer (physio, other surgeon etc ), an additional insurance company and one for the Physiotherapist .



## Weight and Height

The patient's weight and height is still on the front screen but these details are also now on the Patient history screen. If it is entered in the patient information tab it is automatically transferred to the field on the patient history screen as the preop weight and height. If users want to record the patients weight over time it can be entered again at post op visits in the patient history screen.



## Biochemistry fields

All modules have fields on the surgeons examination screen to enable some common lab tests to be added. The Hip and Knee arthroplasty modules have additional fields for serum and urine cobalt and chromium levels. These are located on the surgeon examination screen. There is provision to add 3 more of your own also.

The image shows two side-by-side screenshots of a software interface. The left screenshot displays a 'Biochemistry' section with input fields for Serum Cobalt levels, Urinary Cobalt levels, Serum Chromium levels, Urinary Chromium levels, ESR, INR, CRP, PTT, Hb, and Others. A yellow callout box with the text 'Hip and Knee arthroplasty modules' points to the Cobalt and Chromium fields. The right screenshot shows a similar 'Biochemistry' section but with a different set of fields: ESR, INR, CRP, PTT, Hb, and Others. A yellow callout box with the text 'All other modules' points to the INR, PTT, and Hb fields.

## Age and date warnings

If you enter a patient who is less than 10 or older than 100 you will get a message asking you to check the DOB. If the surgery date is also more than 2 years ago you will also get a message asking to if it's correct.

## Scan form for complications

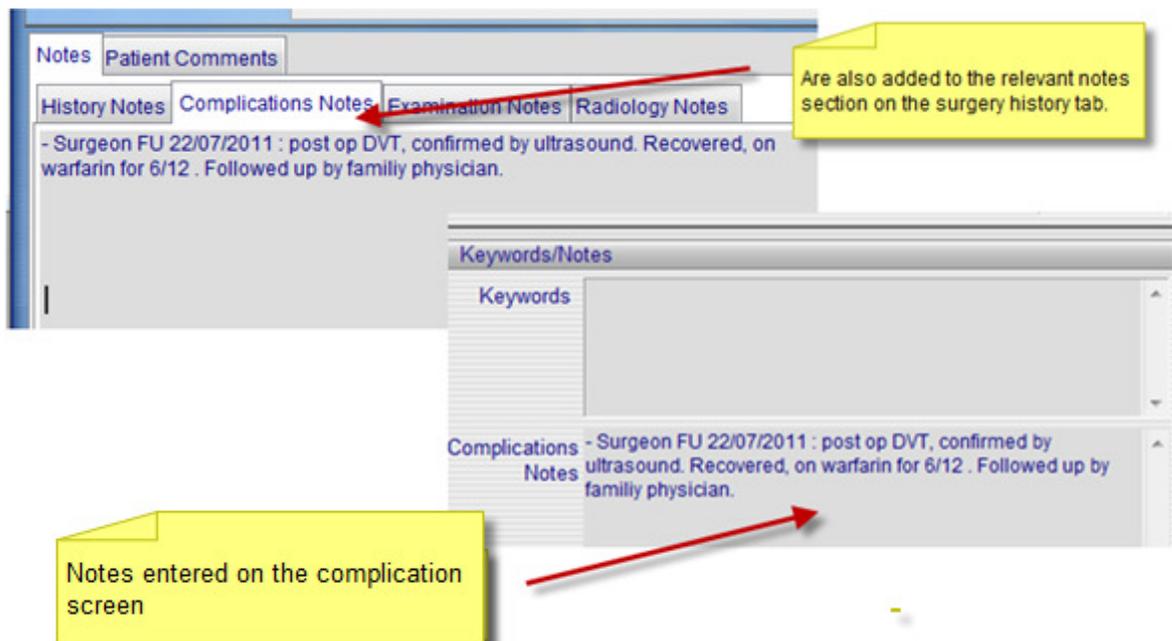
Sites tell us they have difficulties remembering to record complications. We have made a scannable complications form, copies of this could be kept in the surgeons office so if one occurs it easy to fill it out, and easy to scan it in.

## Notes and patient comments

**Dates:** Some users preferred not to have an automatic date entry on the notes, if you don't want this you can deselect it on the set up screen.

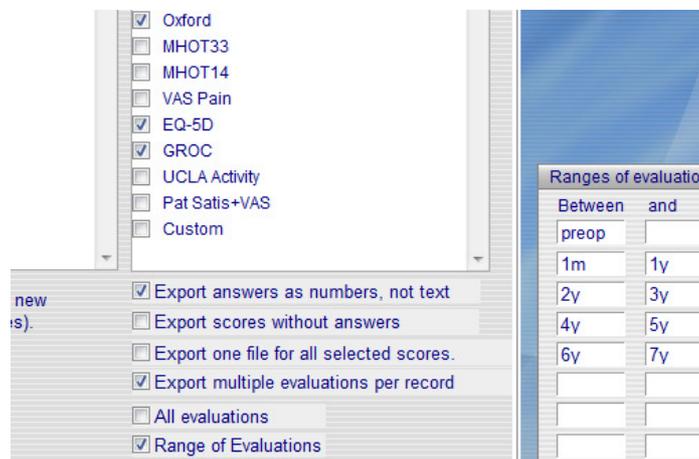
The image shows a screenshot of a software interface. On the left, there is a checkbox labeled 'Do not prefix notes with type and date' which is checked. A yellow callout box with the text 'Wont appear if the box is checked' points to this checkbox. To the right, there are tabs for 'Notes' and 'Patient Comments'. Under 'Notes', there are sub-tabs for 'History Notes', 'Complications Notes', 'Examination Notes', and 'Radiology Notes'. Below these tabs, there is a text input field containing '- Surgeon FU 17/07/2011:'. A red circle highlights this text.

Any notes entered into any of the screens (radiology. Complications etc) will automatically be added to the new notes tabs on the history screen at the same time so they can be easily viewed. We've also added a patient comments section, anything the patient might add to their forms can be added here if users elect to record these in Socrates.



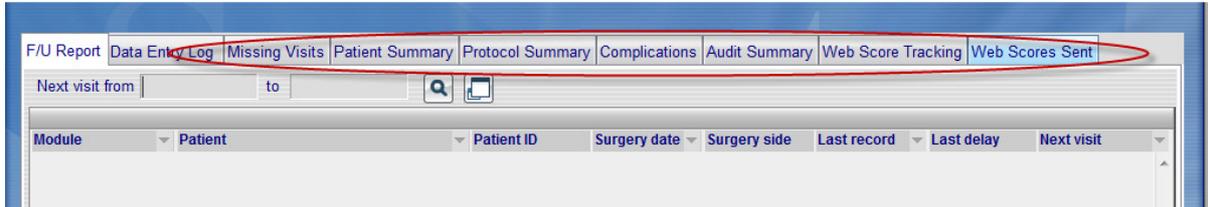
### Export function

This has undergone a major revamp and those of you who are exporting data will be happy to know that it's now possible to export multiple scores for the same patient in the same row. Check the Export chapter in the manual for details. Since there are now more than 10000 columns in excel (2007 and greater) **everything** in the surgical, history and follow up screens as well as multiple follow ups can now be exported in one (very long) row on a spreadsheet. See the chapter in the manual on Export for more details.



### New Reports

There are 7 new reports. For full details about these read the chapter on reports in the manual. These reports are found on the home screen on the Reports icon



### Missing Visit report

If you have allocated your patients into follow up protocols this is an easy way to see who has missed completing their scores/surveys at the allocated times. The report is colour coded and can be printed or exported to a file.

BRILLIANTINO, Fred	Score	PreInj	preop	3m
SG: Routine SI - 04/05/2011	DASH			
	SANE/SSV/Pain			
	Shoulder Activity			
DUNNE, Frances	Score	PreInj	preop	3m
SG: Routine SI - 01/02/2011	DASH			
	SANE/SSV/Pain			
	Shoulder Activity			
GIVEANS, Russell	Score	PreInj	preop	3m
SG: Routine SI - 01/12/2010	DASH			
	SANE/SSV/Pain			
	Shoulder Activity			
SIKKA, Robby	Score	PreInj	preop	3m
SG: Routine SI -	DASH			
	SANE/SSV/Pain			
	Shoulder Activity			

### Patient summary

This is a summary of all patients in a selected protocol and shows their preop scores, their last score, and the % difference between their preop and the latest score, and their last score and the one previous to that. Scores which are less than the previous one will be highlighted in red.

### Protocol summary

This is similar to the previous report but has no individual patient details. It summarises all the records in the selected protocol by individual score and shows the mean, median, average follow up and % differences from preop to selected time points. It has the search function added to it so it's easy for user to be able to look for a sub group in that protocol. An example - a patient over 50 might be candidate for an ACL, by selecting age is =>50 and the protocol you used for your ACL's you can tell them in seconds how many you have done what the preop score was, the % improvement at the last time point, the average follow up for the group, and a selected a time point if required. i.e. at 5 years what was the score vs. the preop one.

## Complications

This report summarises all complications by a date range based on surgery date, or the date of the complication. The first tab has details by patient; the next totals them by surgeon.

## Audit report

This report is a quick way of listing all procedures done in a selected time frame, by surgeon, by module and whether they were primaries, revisions - own or from elsewhere, reoperations - own or from elsewhere. This report only selects surgeries or procedures which have the Type entered.

## Web reports

These record what scores have been sent to the web server, and the time taken to respond to them. If they are not completed in the due time they will appear as Not responded.

## Statistics

Statistics generated routinely can now be saved, and grouped to allow for faster analysis. The example below shows 4 parameters that might be searched for regularly, these can be added to the group and the stats will run through them all once you select the Group name and then save the results to the worksheet.



Group name	Count	Grouped searches	Saved searches
Demo group	4	KG: Age at surgery KG: Anaesthetic KG: Surgery type KG: Tourniquet	KG: Age at surgery KG: Anaesthetic KG: Surgery type KG: Tourniquet

## Personalise fields

It's now possible to add date fields and multi lists for these fields. Go to the Set Up Chapter to read more about this feature.

## Importing or exporting lists of surgeons, assistants, referring Dr's etc.

It's now possible to import and export these lists. Go to the Set Up Chapter to read more about this feature.

## Hip and Knee arthroplasty surgery details

There are some changes to some of the fields on the surgery screens, see the separate document.

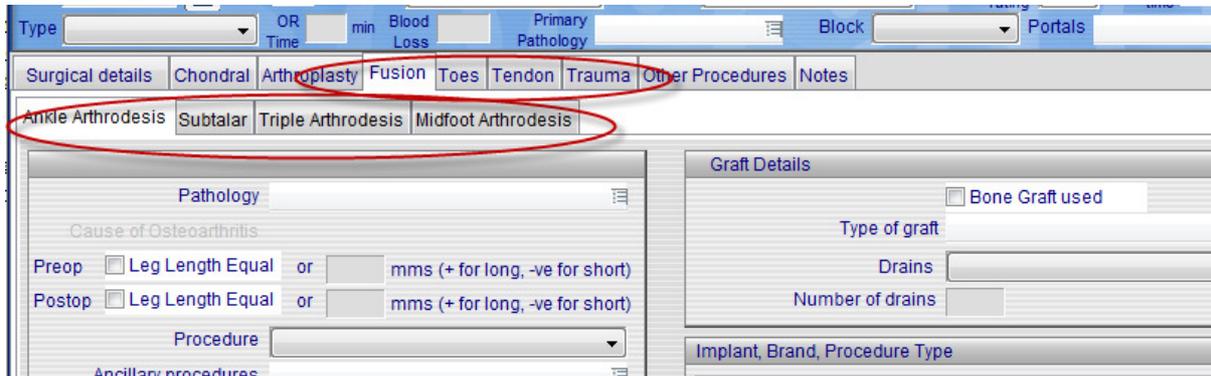
## Knee general module

The patella screen has been completely revamped with a lot more fields added. All the existing data has been converted to a matching field in the new screen. If you choose an ICRS grade for the trochlear or patella it will populate into the arthroscopy screen. Some of the field names on the

meniscus screen have also been changed to match the arthroscopy screen and will also cross populate if entered first into the meniscus tab.

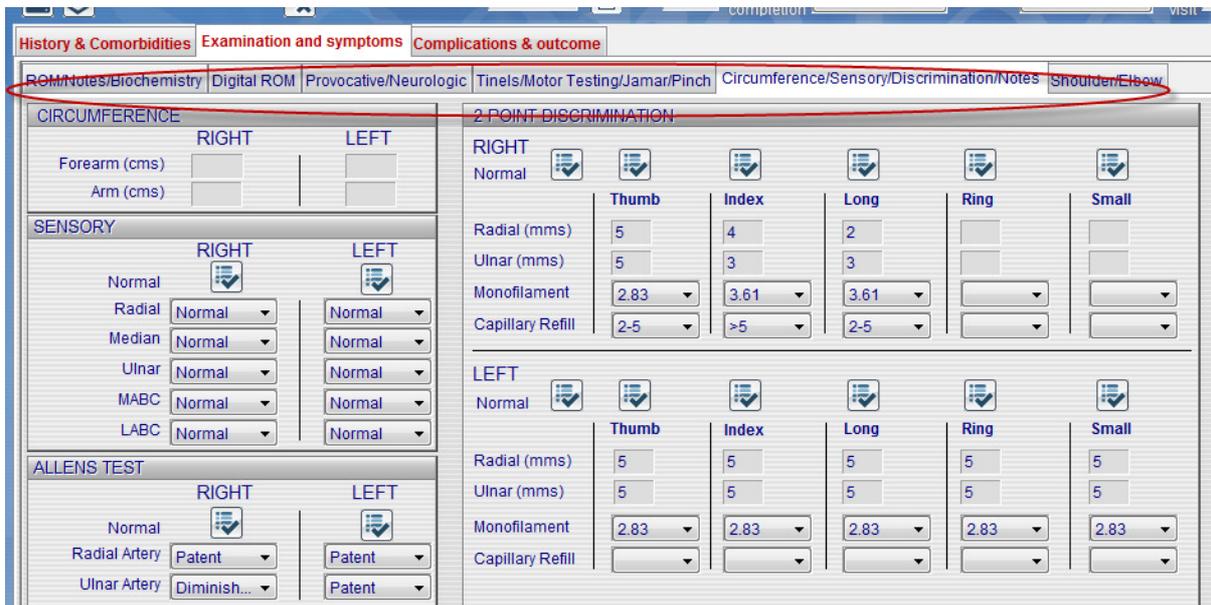
### Foot and Ankle module

We've expanded the surgery details on this module to capture the most common procedures in more detail, as well as some trauma. Read the chapter on Foot and Ankle for more details.



### Hand/Wrist

We have added a complete clinical examination screen for the hand, wrist and elbow. Read the chapter on Hand and wrist for more details.



### Spine

The spine module is still work in progress and we have added an extensive section for patient history. This is still work in progress and we don't recommend that users start using this screen yet, anyone wishing to do so should contact us first.