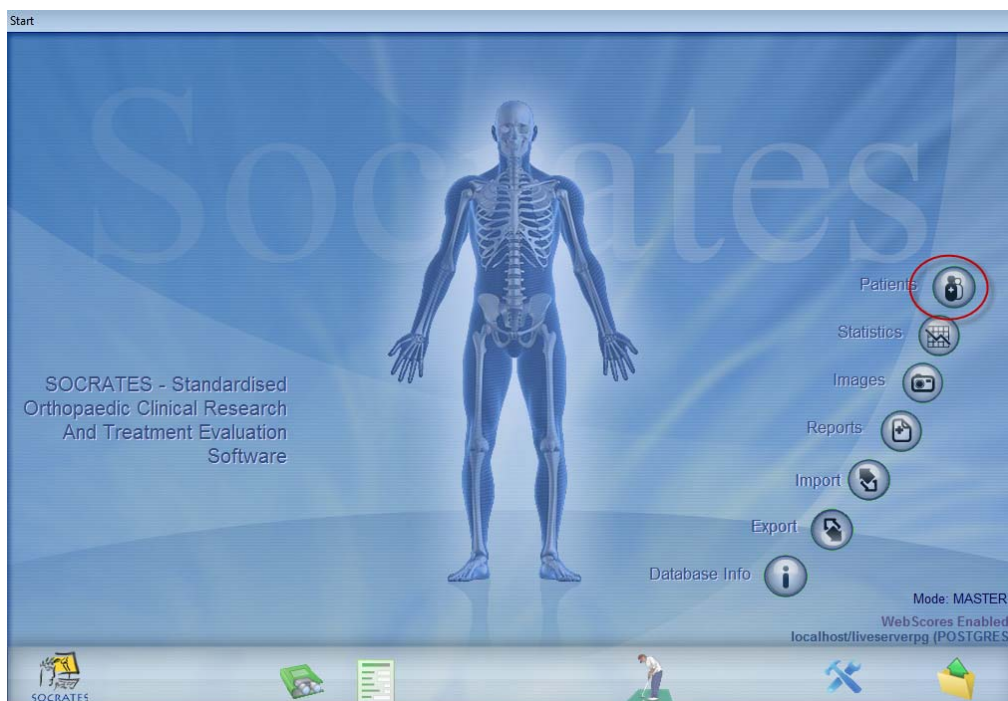
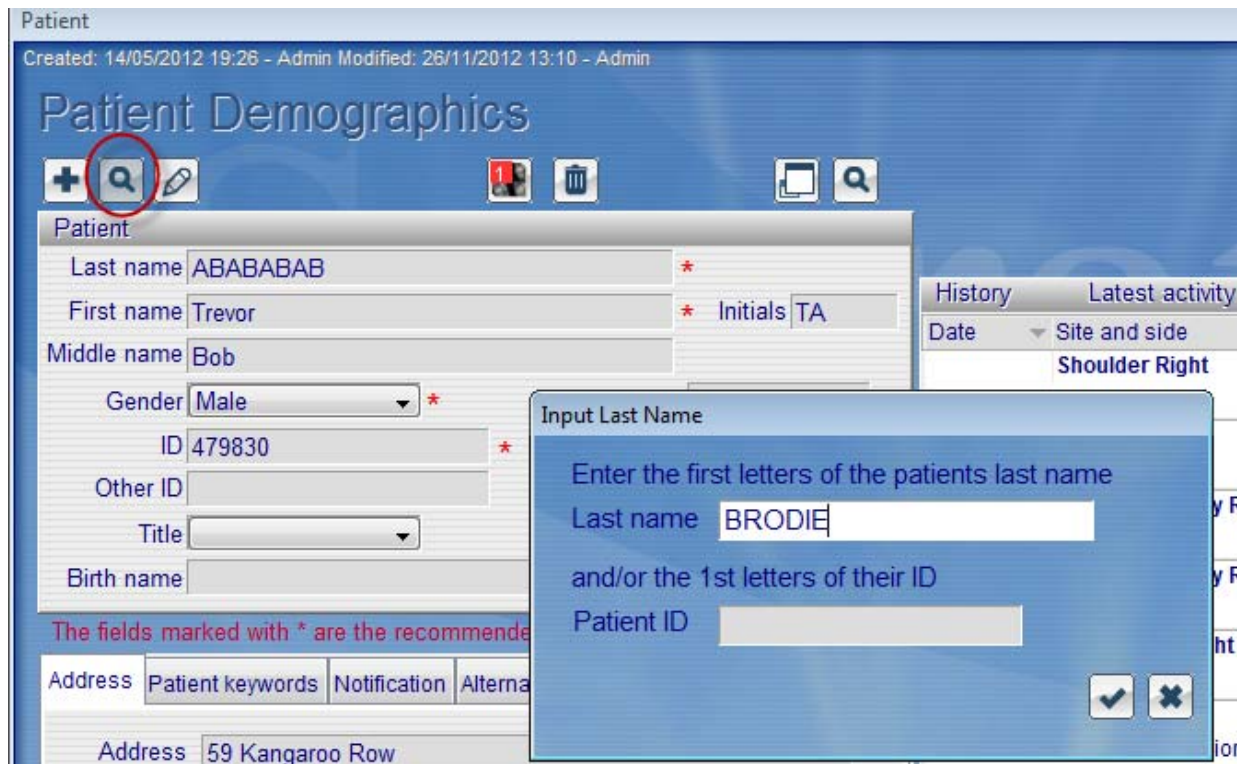


## HOW TO ADD AND SET UP A PATIENT FOR WEB SCORES USING PROTOCOLS

1. After logging in, click on PATIENTS.



2. Click on the magnifying glass. Enter the last name, click on the CHECK mark. There is no need to use the Patient ID unless you have a lot of patients with the same name.



Created: 14/05/2012 19:26 - Admin Modified: 26/11/2012 13:10 - Admin

### Patient Demographics

**Patient**  
 Last name ABABABAB \*  
 First name Trevor \*  
 Middle name Bob  
 Gender Male \*  
 ID 479830 \*  
 Other ID  
 Title  
 Birth name  
 Initials TA  
 History Latest activity  
 Date Site and side  
 Shoulder Right

The fields marked with \* are the recommended fields

Address Patient keywords Notification Alternative  
 Address 59 Kangaroo Row

Input Last Name

Enter the first letters of the patients last name

Last name BRODIE

and/or the 1st letters of their ID

Patient ID

- 
- The screenshot displays a medical software interface. The main window is titled 'Patient Demographics' and contains a form for entering patient information. The form includes fields for Last name, First name, Middle name, Gender, ID, Other ID, Title, Birth name, Address, City, State, Country, Phone #, Cell Phone, Email, and Other Email. A 'History' tab is visible, showing 'Latest activity 11/29/2012'. A 'Selected patient list' dialog box is open, displaying a table with columns: Lastname, ID, Birth Name, Firstname, Gender, and Date of birth. The table contains two entries: JONES, 0352, Bruce, Male and JONES, 9166, Diane, Female. The dialog box has buttons for 'Select Patient', 'Modify Patient', 'New Patient', and 'Cancel'.
- Created: 05/08/2011 11:49 - Admin Modified: 05/08/2011 11:49 - Admin
- ## Patient Demographics
- 
- Patient  
 Last name A \*  
 First name S \* Initial SA  
 Middle name  
 Gender Male  
 ID 114  
 Other ID  
 Title  
 Birth name  
 The fields marked  
 Address Patient ke  
 Address  
 City  
 State  
 Country  
 Phone # Cell Phone  
 Email  
 Other Email
- History Latest activity 11/29/2012
- Examination
- Selected patient list
- | Lastname | ID   | Birth Name | Firstname | Gender | Date of birth |
|----------|------|------------|-----------|--------|---------------|
| JONES    | 0352 |            | Bruce     | Male   |               |
| JONES    | 9166 |            | Diane     | Female |               |
- Select Patient Modify Patient New Patient Cancel
- 1 / 420

- SOCRATES: Adding a new patient or surgery for webscores with protocols.doc

**Patient Demographics**

**Fields with red \* are mandatory**

**Patient**

Last name  \*

First name  \* Initials

Middle name

Gender  \* Date of birth  \*

ID  \* Current Age

Other ID  Marital status

Title  Race

Birth name

The fields marked with \* are the recommended minimum fields.

**Address** **Patient keywords** **Notification** **Alternative Contact** **Notes**

Address

City

State  Post Code

Country

Phone #  Cell Phone

Email

Other Email

**Change Method of Notification?**

Do you wish to set the method of Web Score Notification for this patient to "Patient Email"?

- To add a new surgery, go to PLUS sign on the right. Select the module, side and protocol correct for that patient. If the web scores aren't already checked you can ask your administrator to set this up to be checked automatically. If there is only one protocol for each module this can also be set up to populate automatically.

**Patient Demographics**

**Click here to add a surgery**

**Patient**

Last name  \*

First name  \* Initials

Middle name

Gender  \* Date of birth  \*

ID  \* Current Age

Other ID  Marital status

Title  Race

Birth name

The fields marked with \* are the recommended minimum fields.

**Address** **Patient keywords** **Notification** **Alternative Contact** **Notes**

Address

City

State  Post Code

Country

Phone #  Cell Phone

Email

Other Email

**History** **Latest activity**

Date Site and side Latest FUP Injury Examination

**Select module and side**

Module

Side ☐ Right ☐ Left

Bilateral ☐ No ☐ Staged ☐ Simultaneous ☐ Previous-other side

☐ Create bilateral records

F/U Protocol

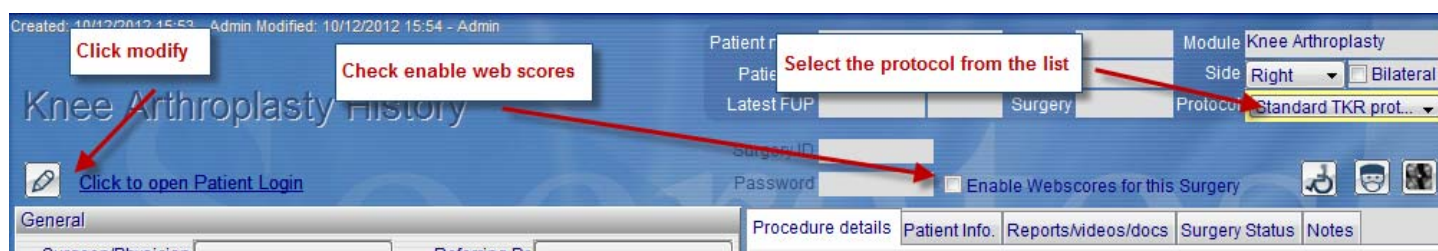
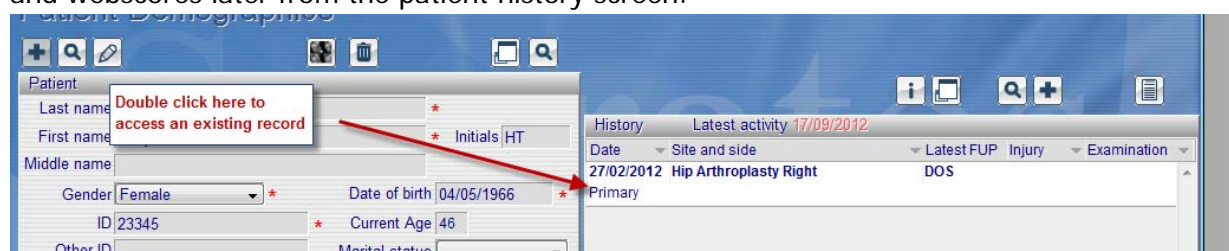
☒ Enable Webscores for this Surgery

Use this window to add a new surgery or treatment for current patient. DON'T USE THIS WINDOW TO ADD A SCORE OR EVALUATION OF AN EXISTING SURGERY OR TREATMENT. Check the Info button on left side of the History window.

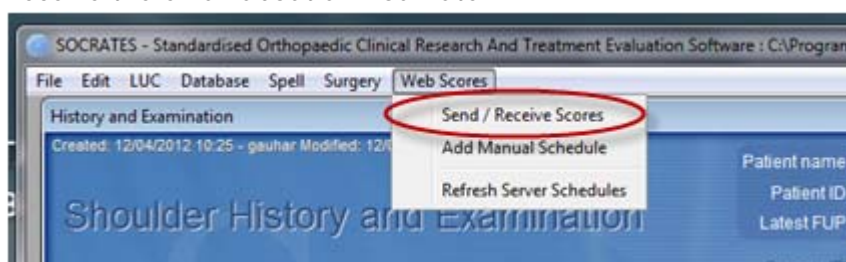
**Click enable web scores**



If you have already set up the surgery record without a protocol, you can add the protocol and webscores later from the patient history screen.



6. The preop web scores will be then be sent out the next time Socrates sends out messages. How often Socrates sends new scores is dictated by the Interval selected in the Web Score Settings set up screen. If you want the patient to fill them out straight away go to the file menu bar, then select Send/Receive Scores. If the patient was set up to receive them by email they will receive the email about an hour later.



7. From now on, if the protocol applied to them contains post op scores, once the date of surgery is entered the scores will be sent out automatically when they are due based on that protocol.
8. If the patient is to complete their scores in the clinic, please read "How to fill in scores in the clinic".
9. If you want to send manual scores (that's when there is no protocol set up) please read "How to send Manual scores".