Adding Custom Fields and Evaluations

If something that you would like to record is missing from Socrates, you can add it yourself.

There are several ways that you can do this and it's important that you are clear about what it is that you want to add, and what you are going to do with the data eventually.

You can add keywords (which are found in the adaptable fields) to flag additional fields that you might want to recall later, but if it's likely that this data might be needed for statistical analysis it's better to add a new custom field or evaluation rather than using just a key word.

The Customise personalise option allows you to set up additional fields in several different formats to capture specific information that is not already in the database.

It's important to read this chapter well and be sure to understand the different options and set these up properly. Once you have data entered into them it's there for good... We suggest that you start with documenting what you want to add, and contact us the first time so we can help you through it. Once you have got the hang of it you'll be safe to let loose on your own...

The custom fields are first set up from the Set Up Screen.

There are 3 places in Socrates where you can add custom/personalised additional fields.
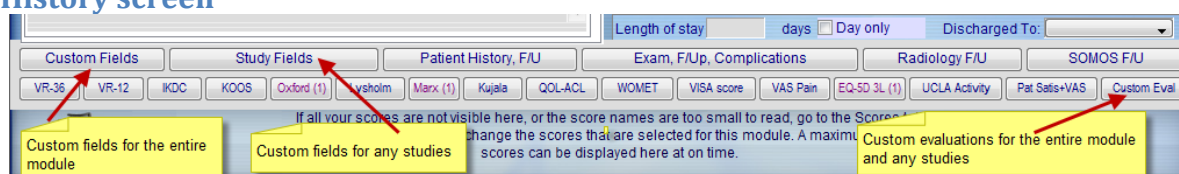
- The module overall

- Study specific custom fields

- Surgery fields for capturing specific intraoperative surgical details.

The ones for the module overall are accessed from Personalise, the study related ones from Studies. See later in this document for the difference.
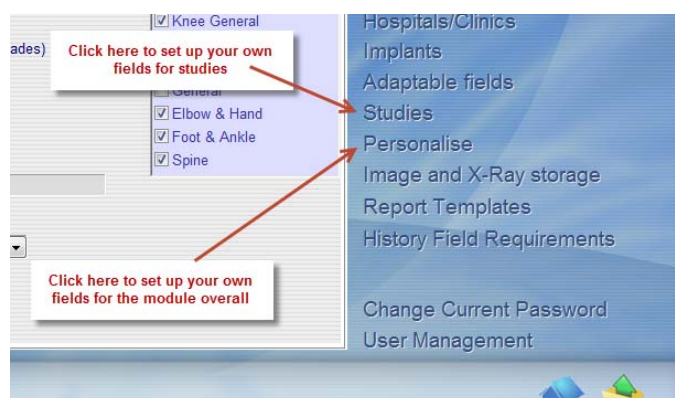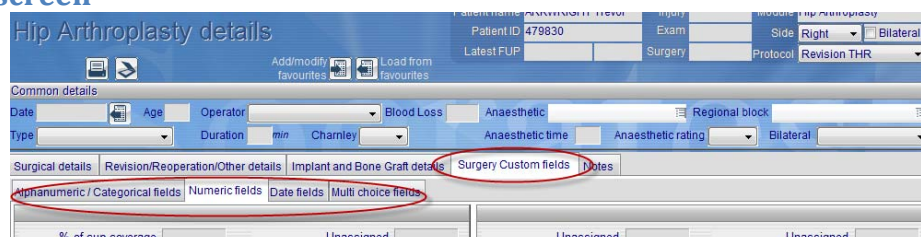

Once the new lists/fields have been created they show up for data entry on the bottom of the surgery history screen above the scores, or on the surgery screen if they are for recording fields specific to the surgical details.

History screen

Surgery screen

Adding custom fields/evaluations for the module overall

The ones accessed from the main Set Up screen allow you to add custom fields and evaluations to the module for use with any record in that module. These will show up on the module every time you enter this screen and will be visible for all records in that module.

Adding Study specific custom fields/evaluations

You may also want to set up custom fields for a particular study that are only relevant for that study. For example, in the knee general module you may have some additional fields that are particular to a knee cartilage regeneration procedure. You don't need to add these to the main part of the module for general use as they are only going to be used for the group of patients undergoing that procedure. You can assign a study to these surgeries or procedures, then assign custom fields or evaluations to that particular study and they will ONLY show up for that study group. See later in the chapter for how to do this. This effectively gives you an unlimited number of available fields as each time you add a new study you can set up new lists of custom fields and evaluations.

Adding custom fields for Surgical details

These are on the surgery screen and allow the addition of fields to capture any additional details related intraoperative surgery details, an example might be a new surgical approach the surgeon is trying. These could also be entered in either of the other 2 places, module overall, or study but it's handy to have them available on the surgery screen without having to exit the screen. Only custom fields (not evaluations) can be added here since details recorded at the time of surgery are only captured once at the surgery.
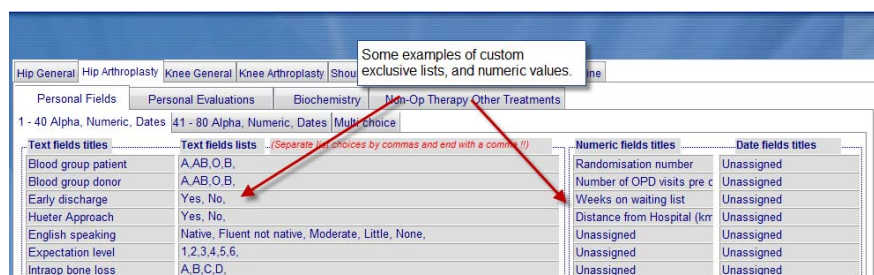
Fields vs. Evaluations.

It's very important that you understand the difference between these two before you set anything up.

This is where they are displayed on the history screen and where the data would be entered into the individual record
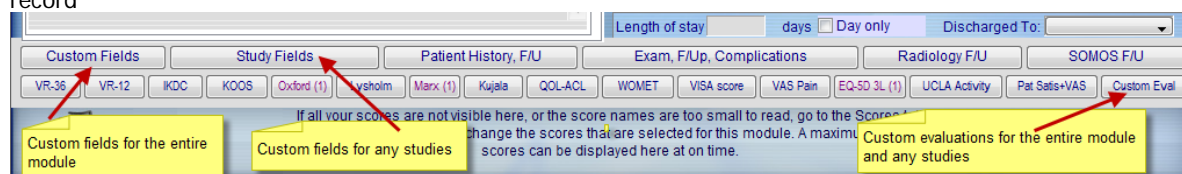
Custom Fields refer to *non-recurring events*, things that only require recording **once** for that patient/record. Examples are the blood group of the patient and donor, an intra-operative rating scale for bone loss, a randomisation number, the number of pre-op visits; or the number of weeks on a waiting list. Once entered as a Personal Field in the Set-Up Screen, these fields will appear on the **Custom Fields** tab on the history screen. This is what they look like on the set up screen. None of these fields will need recording more than once for that patient for that procedure.

The next screen shot shows how those fields in the last screen shot will appear on the data entry screens.
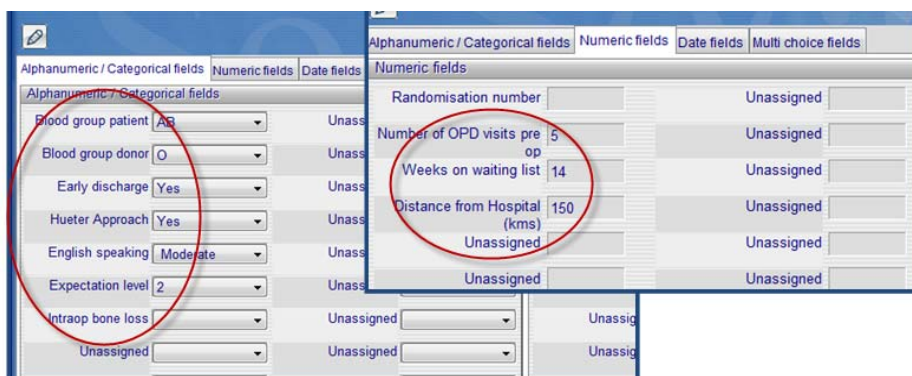
Custom Evaluations on the other hand, record *recurring events/fields* that you want to monitor over time at different follow-ups in the same way as you would a score. Examples include numeric values such as serum or urine levels for a specific study, or a gait analysis test. You want to measure these at different time points the same as you would for an activity score.

This is what they look like on the set up screen.

This is how they would look on the Custom evaluations data entry screen.

This is accessed on the history screen on the bottom row with the scores.

Can't find them? Check the Set Up Screen and make sure that you have checked that box to display it, it's right at the bottom of the list for all modules.
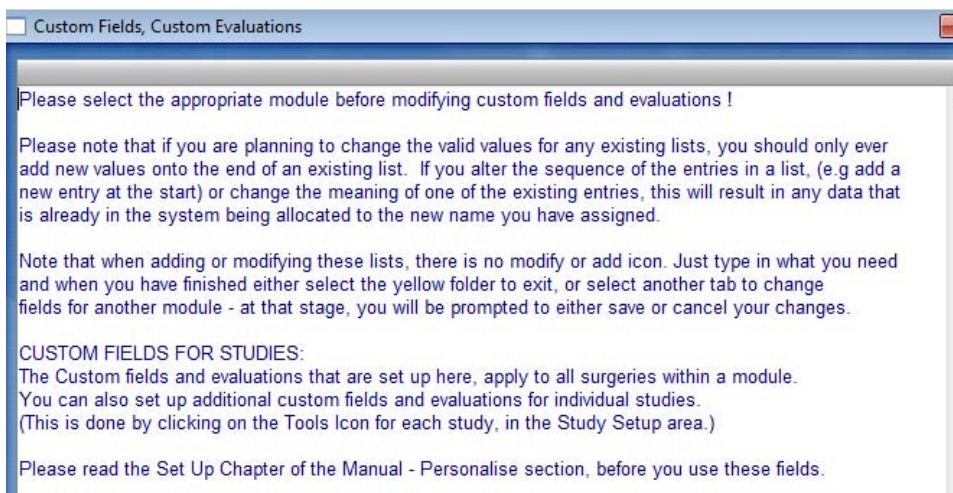

Setting up your lists

The process of setting up the list and field names is the same whether it for the overall module, or a study related one. The only difference is where you go to access them.

When you first access the screen you will see this message to remind you to select the correct module, and a warning about making changes.

This is what the set up screens look like. Each module has its own a separate tab, and then a tab for either a field or an evaluation. Then sub tabs for all the different types of fields and lists where you can add options – Alpha numeric, Dates, Multi etc. Each field title is labelled "unassigned" until you set up and name a new list.
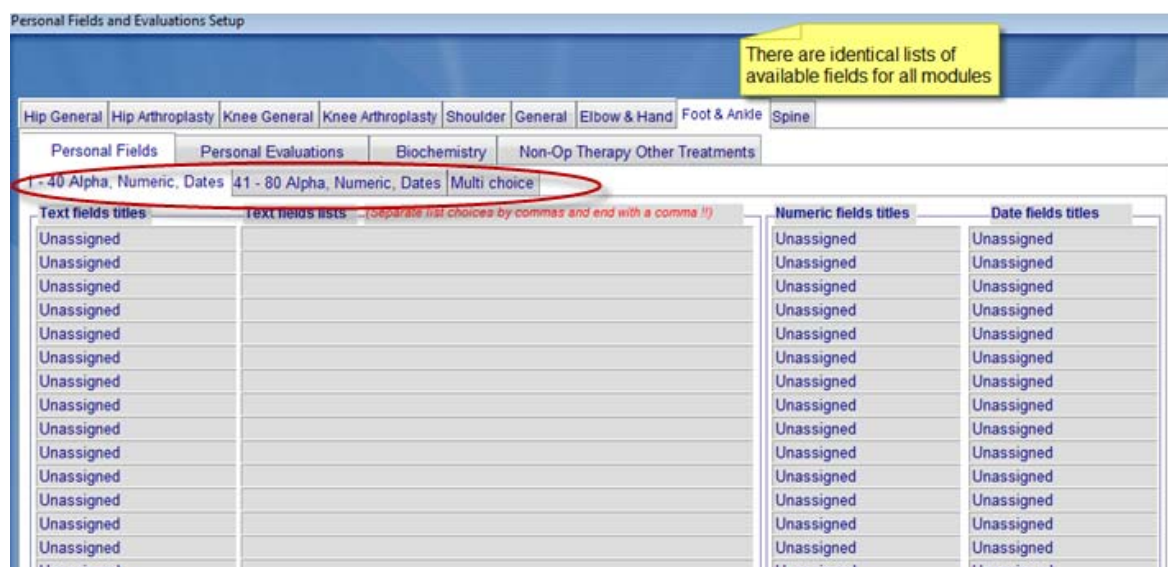
Not selecting the correct module or field vs. evaluation tab is the most common mistake made setting these up.
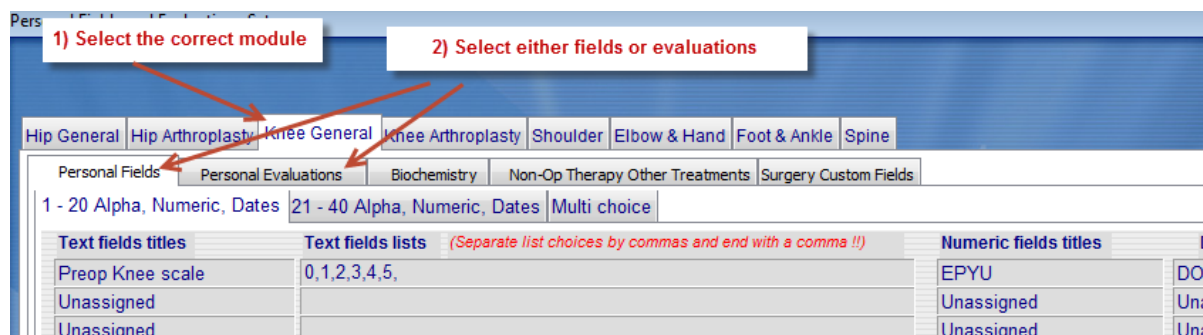
There are 6 different types of fields available.

Alpha/text exclusive

This enables you to set up lists of text which appear on the screen as **exclusive** lists, i.e. only one field on the list can be selected. Examples would be *Blood group* – A/B/AB/O/ or *Approach* – upside down/back to front/ around the wrong way/ etc.

Alpha multi list

This enables you to set up lists of text headings which appear on the screen as **multi lists** i.e. more than one field on the list can be selected. Examples would be *Other joints affected* - Hands/Arms/Spine/Ankles/ or *Family members affected with Hyperlaxity* Mother, Father, Brother, etc. as below.

Numeric

This enables you to set up lists where you might want to record numeric values. Examples are Number of physio visits, Age at first injury, weeks on waiting list. You create the heading or field name, then enter the actual numeric value on the data entry screen for each record.


Date lists

It's sometimes useful to know a date when a past event might have occurred. You can set up headings and record a date for anything you want. Examples would be *Date of original injury* (it might not be the same as the current one), Date of 1st surgery (done elsewhere) Sometimes patients don't know the exact date, maybe only the year. In this case you could assign a default date, say 1st January which you could then use where the exact date wasn't known. Or you could set up a numeric field, *Months since first injury* for example as an alternative.

Biochemistry lists and Non operative lists

These screens give you the option of adding the field titles to the extra fields for Biochemistry and Non-operative Therapy areas which we have left as unassigned. These can be assigned a name in the Set Up screen and once they are assigned a title they will show up on all screens as that name. If you use up all of the fields on these screens you can always just add the name of the test as a numeric list name in the custom evaluations.
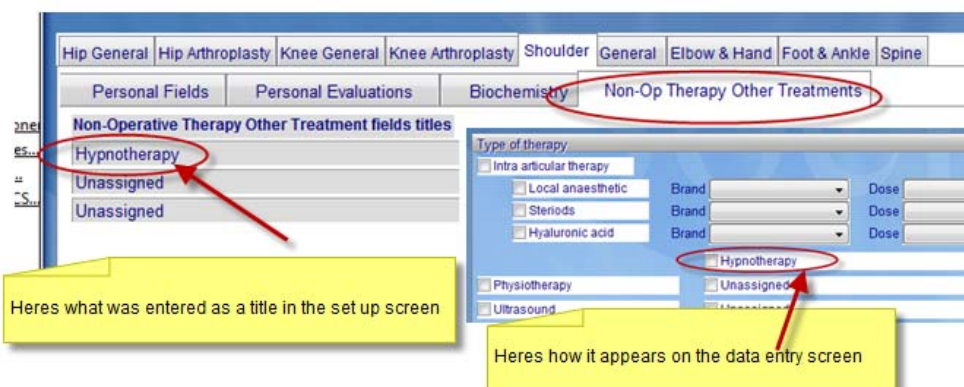
To sound like a stuck record, before adding a new field or evaluation list, make sure that you are in the correct module and that you have decided if your new item is a *field* or an *evaluation*. Select either the Field or the Evaluation tab once you are in the module you want. You should have worked out what the titles of your new fields will be and which type they are, exclusive, multi, numeric etc.

- Select the type of list/field that you are going to set up, exclusive, numeric, multi list etc.

- Highlight and delete the placeholder *Unassigned* in the Text Field Title column, and type in the name or value you want. This is going to be the name of your new field. **Note that there is no ADD or MODIFY icon, just start typing.**

- Now tab into the Text Fields List and type in a list of all the possible responses for this item, separating them by commas, and the list should end with a comma. This is going to be the drop down list for your new field.
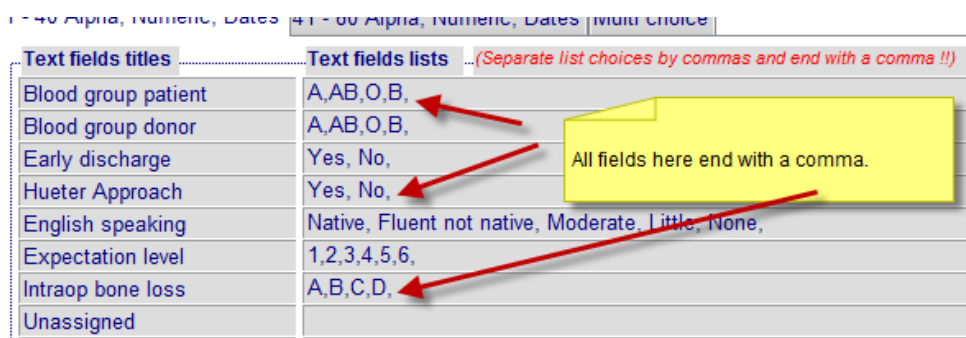
- To add a numeric field heading or date field just enter the field name or the date title, e.g. *Potassium level*, or *Date of 1ˢᵗ Injury*. The actual value of the Potassium level or date of the first injury is entered into this field once you are back in the patient's surgery record.

- Use the tab key to progress to the next new field you want to enter.

- To save just click on the Yellow Back folder, or another module tab, and you will then see the Save message.

- **Before you click save make sure that you are in the correct module, and that you have set up either custom fields or evaluations in the right place**.
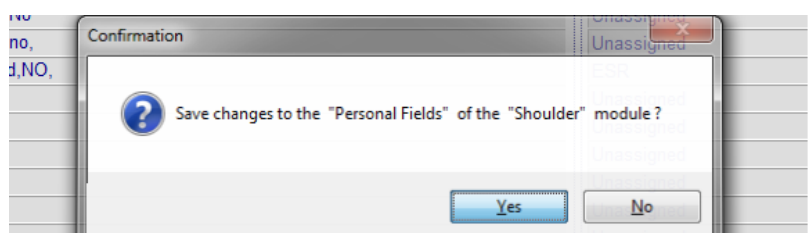
Once you exit this area (with the yellow Back Folder), if you have made any changes, you will see this message while it adds your new fields to the database search lists. It might take a while to do this as it is adding these to the search list, the statistics, the export etc. These fields will become searchable and used in the same way as the fields that are already in the program.
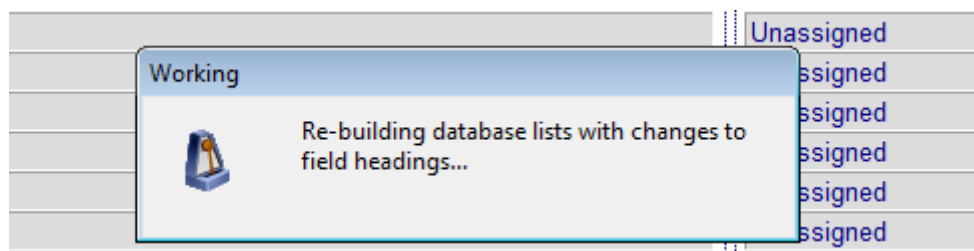

One more thing... it doesn't like having fields titles with nothing in them. If you make a mistake, put the name in the wrong field or module for example which happens quite a lot when you are first doing it, delete the name and copy the name "unassigned" from one of the other fields – or type it in.

## Setting up custom lists for specific studies

This feature enables you to add the same type of fields as described previously but they will be linked to a study group, and can only be added and data entered by specifying the study group for each record. You can add 40 exclusive field lists and 20 each of the numeric, dates and multi list fields and evaluations to each study.

Since these are attached to a study it makes sense that firstly you have a study set up so that's your first port of call. Go to the Set Up screen – Studies and either select an existing study you want to add the custom fields to, or add a new study. Once you have the study set up, highlight it then click on the tools icon on the far right.
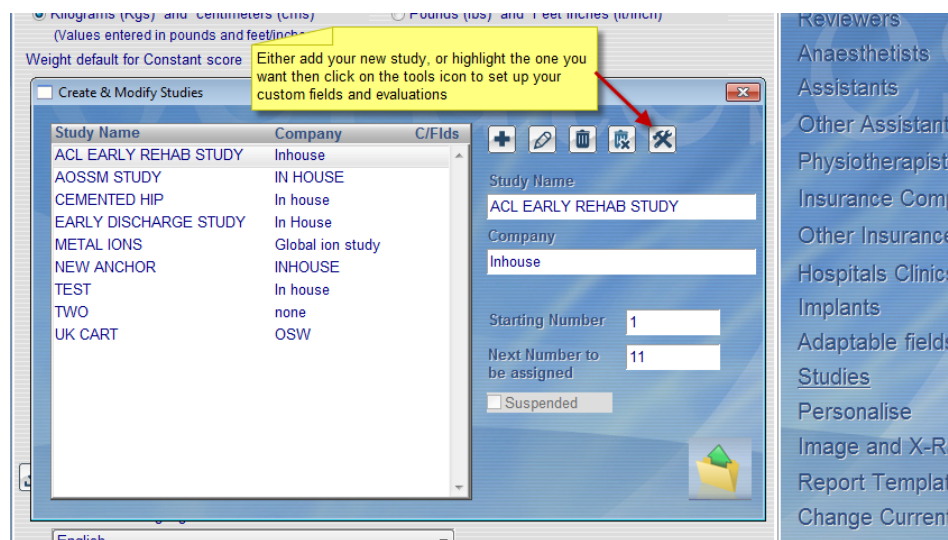

Once you click on the tools icon this message will appear reminding you that you don't have a modify or add icon here.
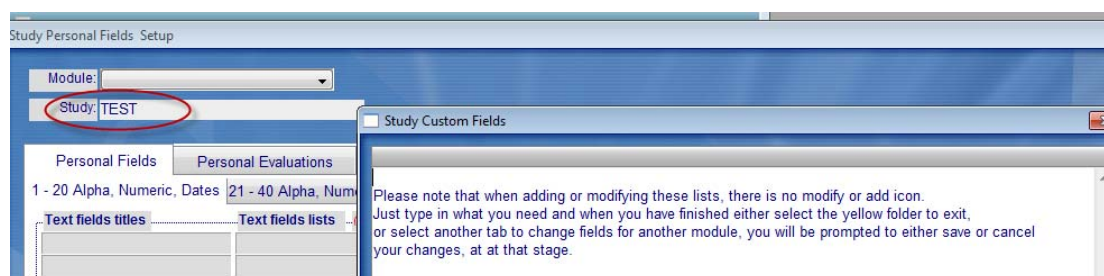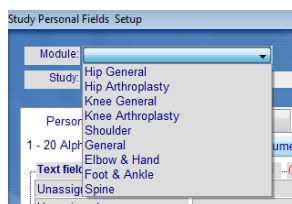
You will then see the study name displayed, you now need to click on the drop down list and **select the module** for the study you are adding your new fields or evaluations to. If you don't, you will be prompted to do so before exiting the screen. This is very important, if you don't check the module, you may end up entering a hip study into the Spine module and you will be wondering where it is when you go to look for it on the Hip Arthroplasty module.

Make sure that before you start you understand the difference between fields and evaluations and select the correct tab.
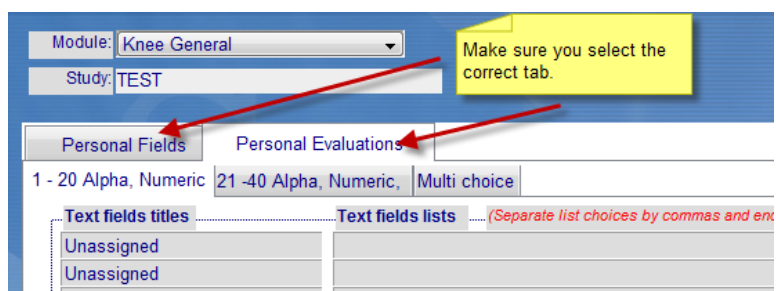
You can now add the names and field lists of your new custom fields or evaluations in the same way as the standard ones. Then exit the screen using the yellow Back icon. This will bring you back to the Create Study window. Once a study has custom fields assigned to it the list will display a Y on the right of the screen. Exit this window using the yellow Back icon and you will see this message as the new lists are added to your database.
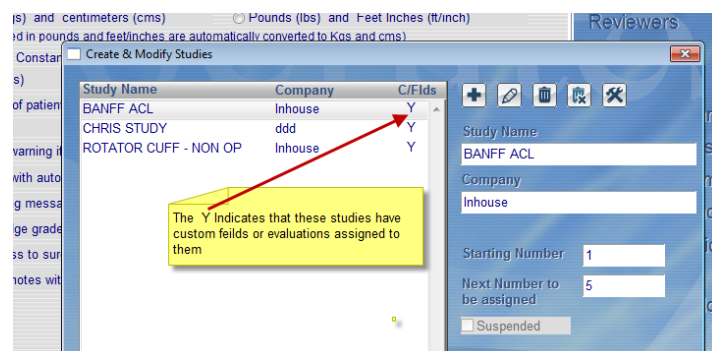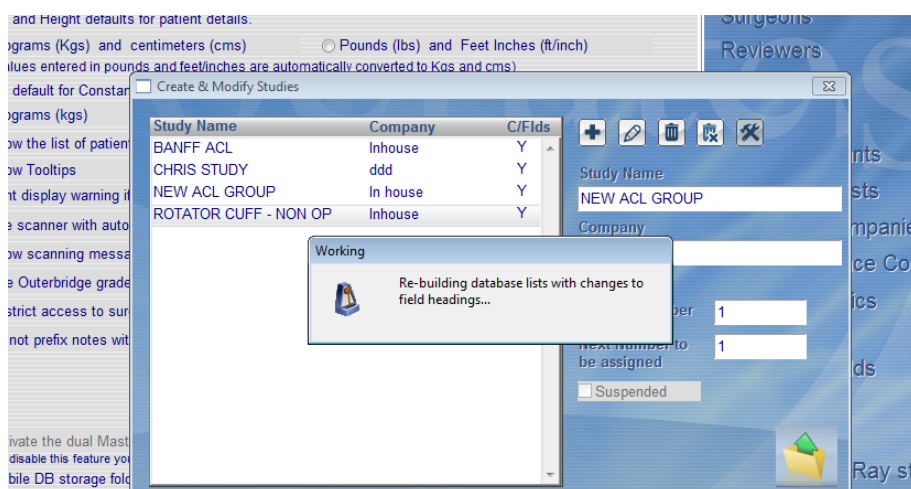
*Assign a study custom field to the surgery record*

You can only add custom fields or evaluations to the study related ones once the surgery record has had a study assigned to it. At this stage you have set up your custom fields or evaluations that you want for the individual study, now you need to assign a study to a surgery record before you can add any data into these fields. If the study was already assigned to a surgery record you will be able to enter data immediately, otherwise go to the history screen and assign a study or studies to that record. If you don't do this the custom fields and evaluations will not be available to enter for that record.
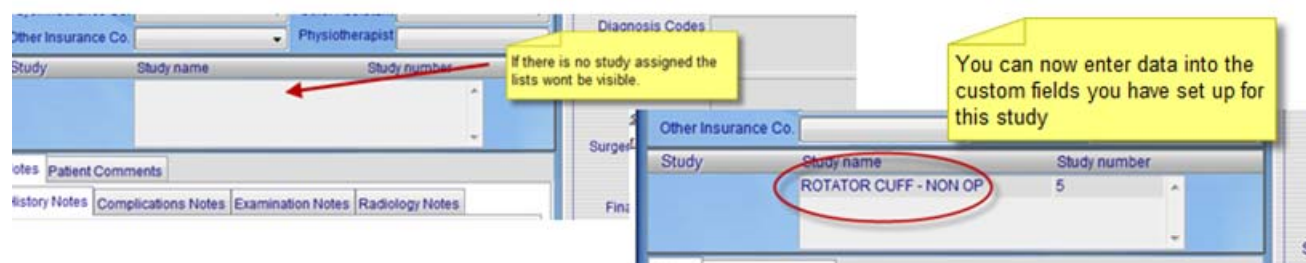
Once custom fields are set up for the main modules, or for studies you can start to enter data into them on the patient's surgery record screen.

Entering data into Custom Fields

The custom fields are located on the History Screen on the bottom left above the scores. The one on the far left displays the custom fields that are general for the entire module, the Study Fields will display only those set up for the specific studies. The custom evaluations for the entire module and the specific studies are all found in the same tab on the far right.
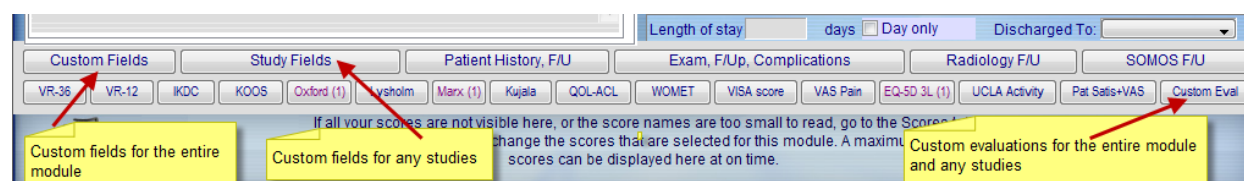

Main modules

Click on Custom fields on the far left, if this is the first time anything has been entered you can just select the field to enter. If you have already entered data you will need to select the modify icon first. Once you have selected from the list/s then click on the green save tick. That's it, these fields are now searchable and analysable for this record in the same way as any of the standard entries.
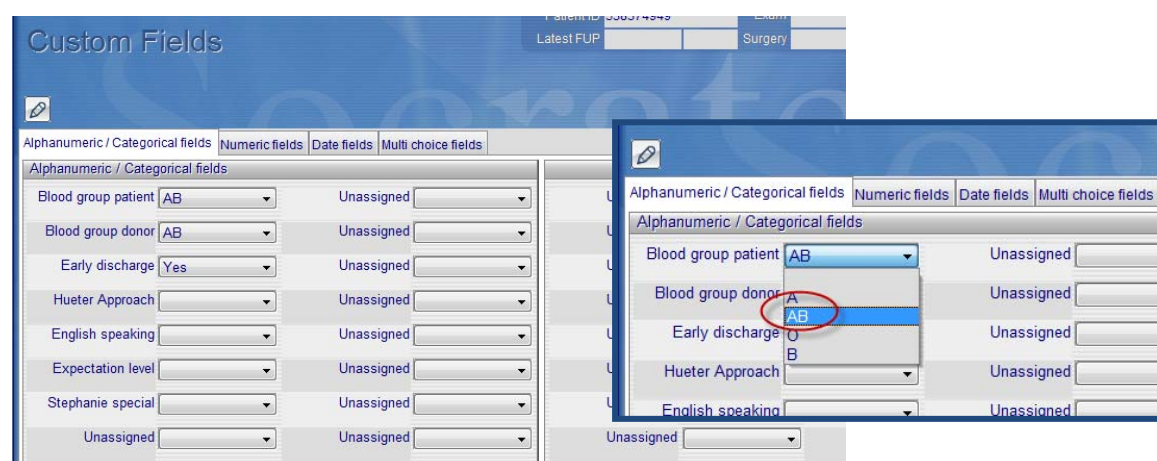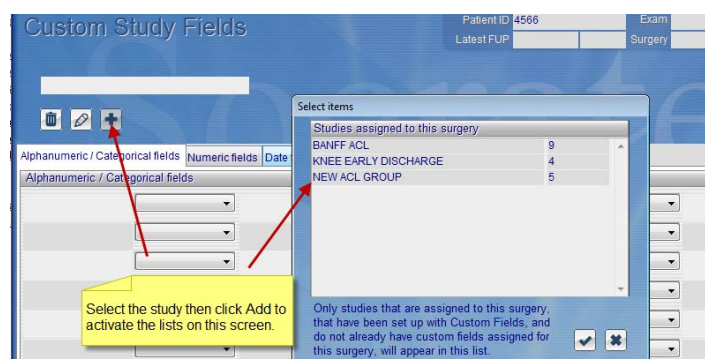

Study Fields

First make sure that the surgery record has had the study assigned to enable you to start to adding data to your study related custom fields. If no study is assigned, the study custom fields won't be visible for that record.

To add data to a study which has custom fields set up, go to Study Fields on the History screen.
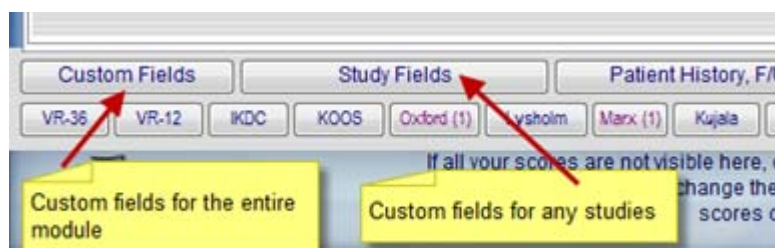
Click on the ADD icon and you will see the list of studies assigned to this surgery displayed. If it's blank it means that either no studies have been assigned to this surgery, or the study has not been assigned any custom fields in the Set Up screen.

Select the study you want then select then tick. You will now see the fields from the lists you created and can enter what you want for that record. Click the green save tick when finished.

Once you have added data the first time, and have more than one study the next time you want to access this set of study fields use the scroll arrows at the bottom of the screen to scroll to the study you want then select modify to add or edit data. You only have to use the Add icon the first time to activate that list for that study on the screen.
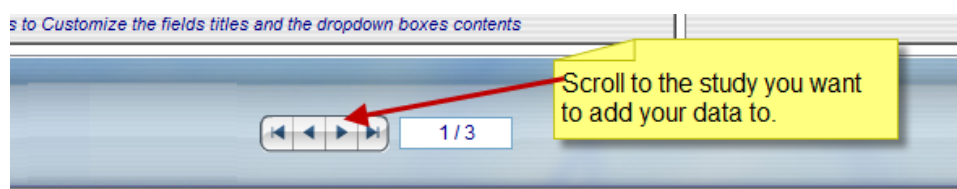
Entering Data into the Custom Evaluations

Access your custom evaluations from the bottom right of the History Screens. Both the evaluations you have set up for the entire module, and your study ones, will be available from this screen for data entry, there isn't a separate one to access for the study ones like there is in the custom fields.

If you can't see the Custom Evaluation tab on the far right, check the Set-Up Screen under the Scores Tab as it may not have been selected to be displayed.
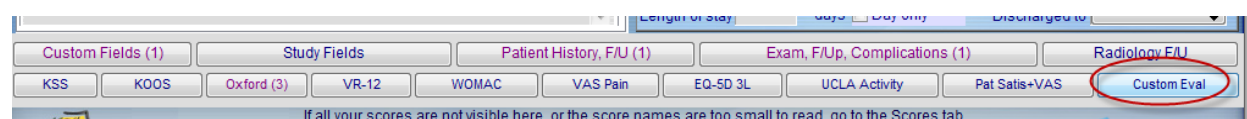
The new evaluations are treated the same as any other score/evaluation, a date of entry, or a follow up period is needed.

When you go to the custom evaluation screen you will see a line with the standard custom field, called "Non study related evaluation" which are the ones for the main module. Then a list of any studies which have had

custom fields set up, that the surgery you are in has had assigned to it. Even if you have set up your lists for a study in the Set Up screen, unless the surgery record for that patient has had the study assigned to it on the history screen it won't show up on the list of available evaluations.
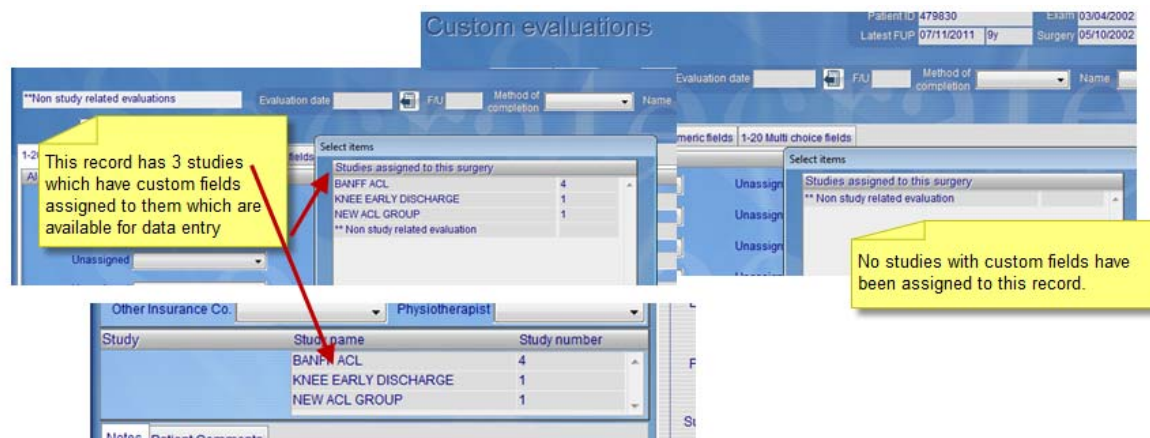
Data is entered the same way as a score, click on the ADD icon and select the study from the list and the relevant list of custom fields will then be displayed. Enter the data, then enter a date or a follow up delay and save. If you want to enter data for more than one evaluation at the same time point i.e. you have 2 studies with data at a preop time point, when you save the 2nd you will see this message the same as you would if you tried to enter a score at the same time point as an existing one. In this case don't overwrite as you want them both, select Create New.
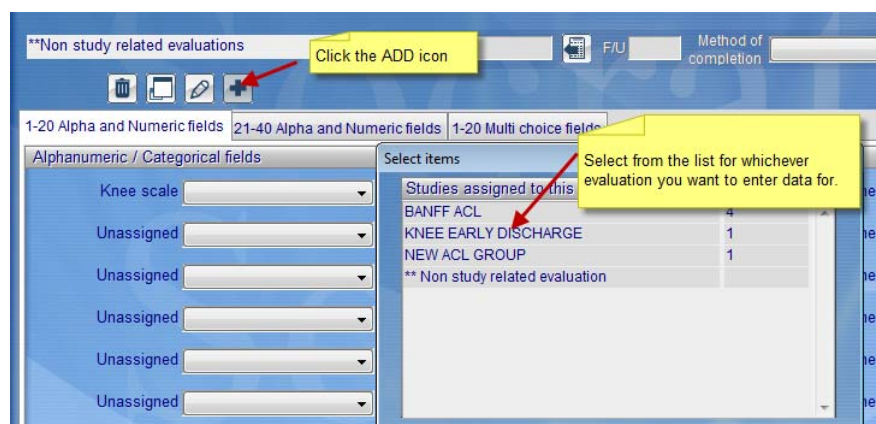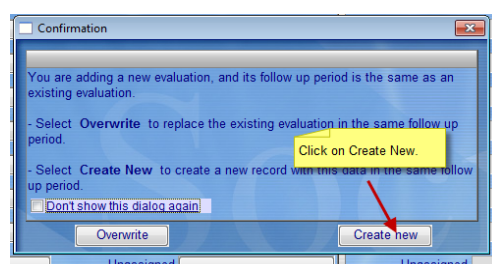

Click on the enter a delay interval or a date, then enter the data into the relevant fields.

Modifying or changing customisable fields

You need to be careful with this feature as once data is entered it's there forever.

If you set up any of the customisable lists, once you have entered data you if you make any changes to the names or position of the field lists on the Set Up screen it will change any data that has already been entered. For example, if you set up a list option e.g. **Pain in Rear**, with 3 responses Mild, Moderate, Severe, the program would store the responses entered for this question as 1, 2 and 3. If you later decided (after you had entered data for these fields) to make the responses None/Mild/Moderate/Severe/and put the None at the beginning, it would now be stored as response number 1 and all your data entered previously as Mild (and stored as response number 1) would now be changed in the existing records to None. If you need to add new responses, you should

add the new response to the **end of the list.** If you make any changes you will see this warning before you save the data to give you a chance to go back if you have altered the order of any of your lists.
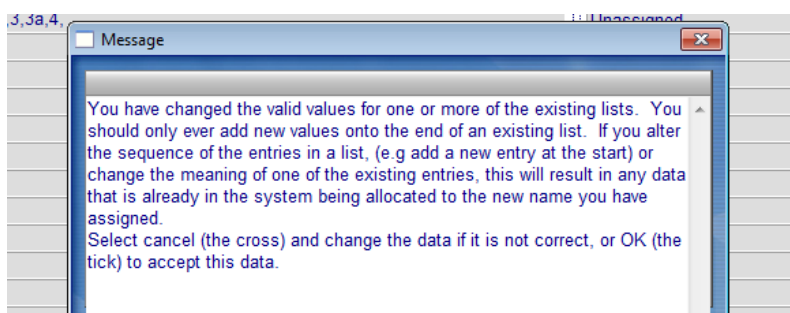

Also, once you have data in these fields you should never use it for another field, even if you have finished with that field. Maybe it was for a study and you have finished it, done your analysis and don't need it any more but the data is still stored there and shouldn't be removed. Even if you rename it with a completely different name all the old data is still there stored as 1, 2 and 3 on the new list, whatever you may have called the new list. So when you searched for your new list you would get all the records for the old list showing up as well.

If you really want to change something, and not have the records affected you would need to run and save a report/export with all the records that have the current data entered for any of those fields **BEFORE** you make the changes. Then make your changes to the list, and go back to all these records individually and change them to the same response they were originally. In the example we used you would need to search for all that had Mild, Moderate, or Severe and then after you have made the change, go to each record and re-enter the correct field name as they will all be one out. Unless you added the extra field to the end of the list in which case nothing needs to be done.

It's a lot easier to get it right the first time!

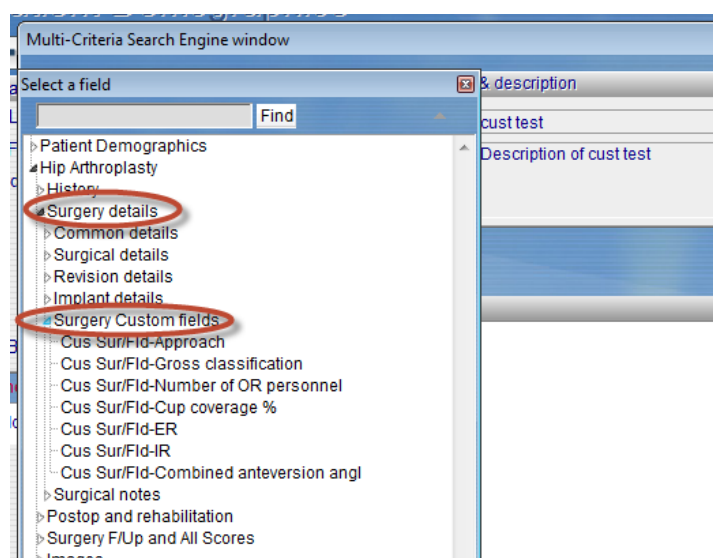## Searching for custom fields and evaluations
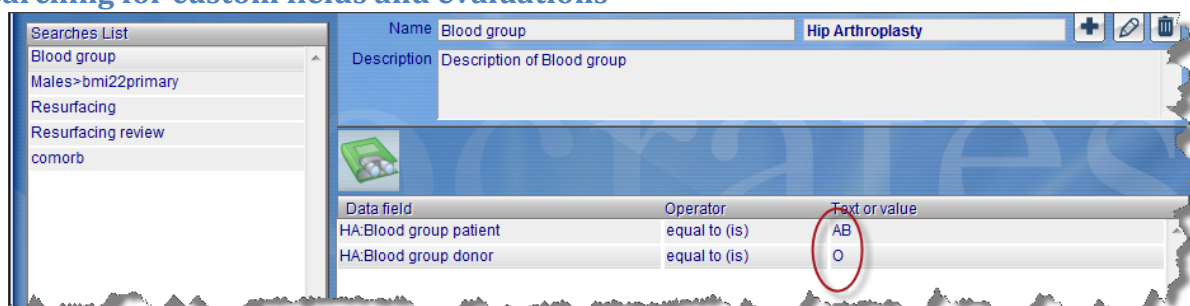
Once your new fields and evaluations are set up and data entered they are now available for searches, statistics and export in the same way that all the other fields in Socrates are. Whatever fields you set up will be displayed in the search list the same as the standard fields.

The custom fields are found in the **History** tab on the search tree. The evaluations are found under the **Surgery F/Up and All Scores** tab. The first list will display the custom fields for the whole module (if there are any) then the study specific ones will be listed below that.
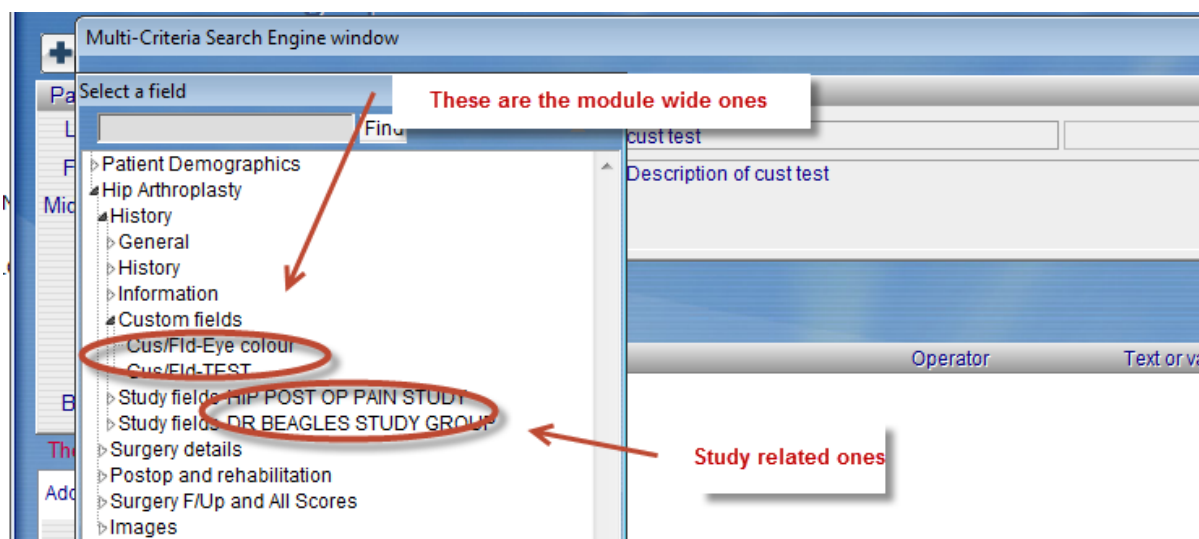
The **Surgical details Custom** fields are found in the **Surgery Details** list.

The **Custom evaluations** are found with the Surgery follow up and Complications
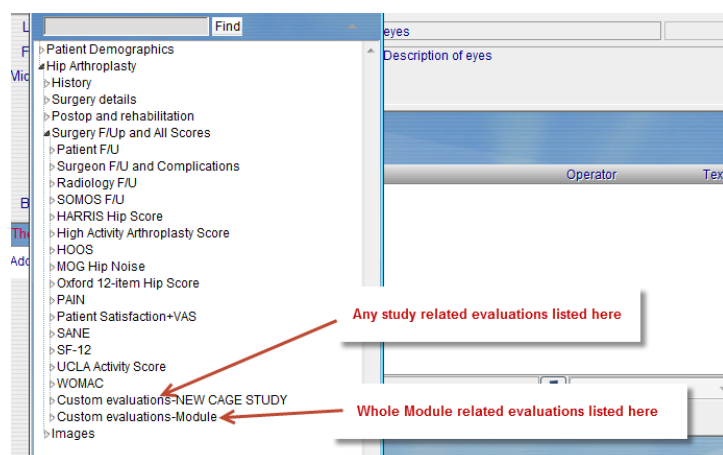
If you have a numeric value you can get the mean and median etc. in the stats also, the same as any standard numeric field in Socrates. If you are searching for an evaluation you will need to select the time point (preop, 3months etc.) in the same way as you would for a score.

You can also use the Export function and set up a custom export for any of these fields, or include them with other data that you are exporting just like a normal Socrates field/score.