

FOLLOW UP PROTOCOLS

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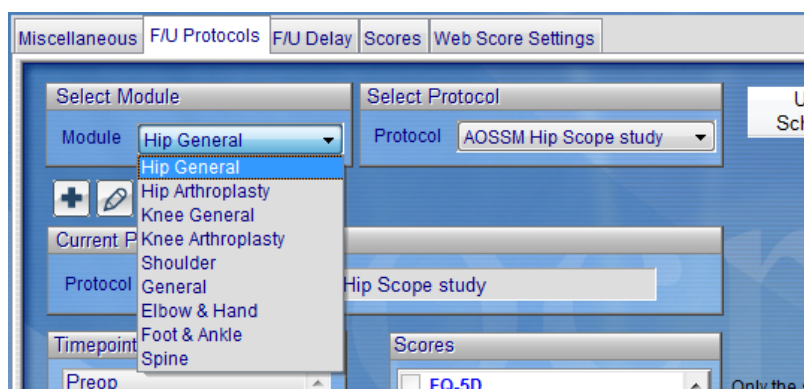
What we call Protocols are follow up regimes – what scores, at what time points do you want your patients to complete. This is one of the most important features of Socrates as there are reports and summaries linked to which protocol the surgery has been assigned to. For the web scores they are mandatory as it's the only way Socrates knows what to send out and when.

For each module you can set up as many protocols as you want. For example you might be a Hip Arthroplasty surgeon but want to use different surveys and follow the patients up at different time points if they are younger more active patients than an elderly population. You could set up a protocol for standard THR's, another for young THR's and another for resurfacing procedures. Shoulder surgeons typically have several different ones, 1 for Cuff disease, 1 for instability, 1 for OA etc.

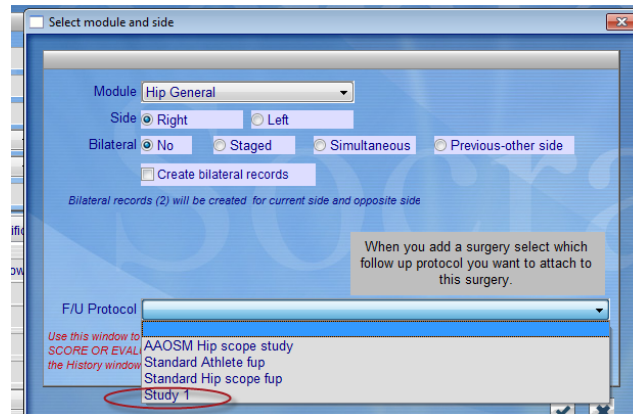
These protocols are very important to facilitate patient follow up. They will enable the web based patient data entry to send out the scores at the selected time points automatically based on what has been selected for that protocol.

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 to allow you to assign the one you want to that patient record. If this is left blank you can still enter scores of course, but Socrates has no way of keeping track of what you wanted, and when.

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. If you have a secretary entering the patient demographics and creating the record, you will need to find a way of letting them know which patients should be assigned to which protocol if you have more than one.



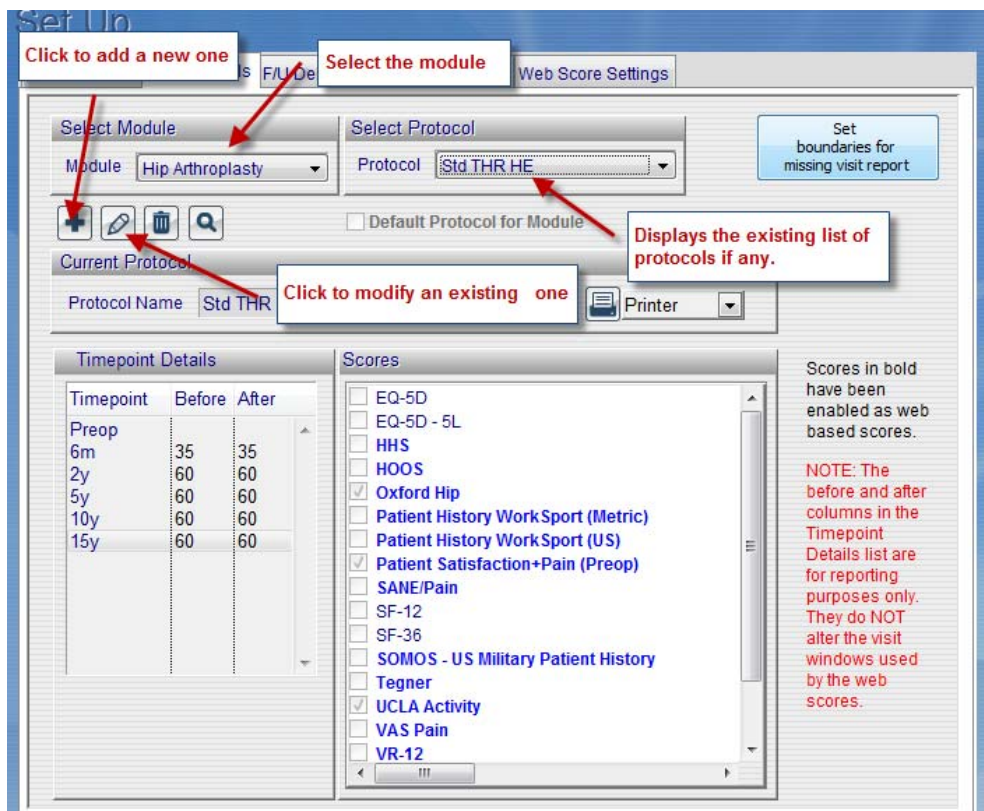
The example shows the four possible protocols available for selection when a new Hip General surgery is added. Remember, there will be no protocols in your new database, you need to create these for your own practice.

You should only include time points in the protocol that you actually want a patient to complete a survey or a score. If it's just a routine "are you OK visit" post operatively and you don't want any scores or surveys completed don't include this time point in the protocol.

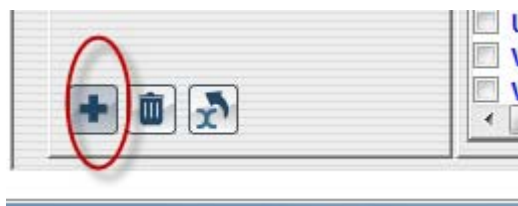
ADDING A NEW FOLLOW-UP PROTOCOL

From the Set-Up Screen, select the [Follow-Up Protocol](#) tab.

Select the module you want from the Module drop-down menu. The protocols that already exist (if any) are listed under the Protocol drop-down menu. To add a new protocol, click on the [blue cross icon](#) below the Module then type in a name for the new protocol in the box below the Add icon (headed up Protocol Name).



Then click the add icon at the bottom of the time point window to add your time points. *We recommend that you add all your time points first* and then go back and assign the scores at those time points.



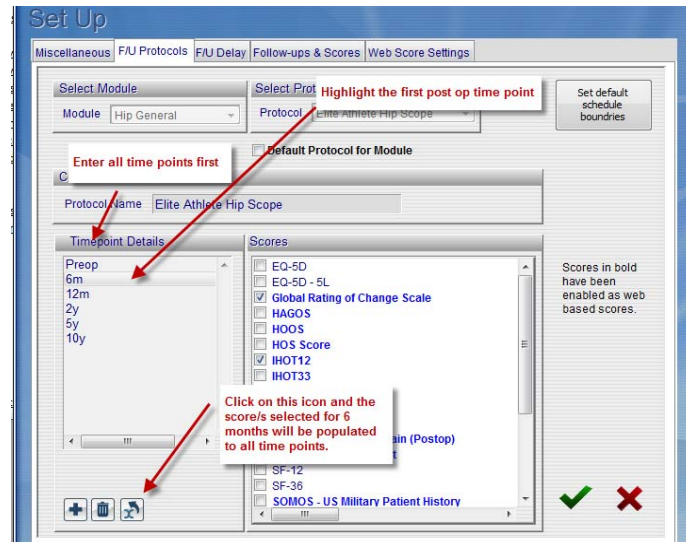
Select the first time point you want – the first option is ‘preinj’ – pre injury. This is relevant for the Sports medicine modules as there are activity scales which are used to assess the patient’s activity level before their injury as well as pre-op and post-op. Only the scores relevant for a pre injury time point will be displayed on the list if you select the preinj option. For some of the modules there are none.

The next option is preop, then either weeks, months, or years. If you select weeks, months, or years, you also need to add a number - e.g. 6 weeks, 3 months, 5 years.

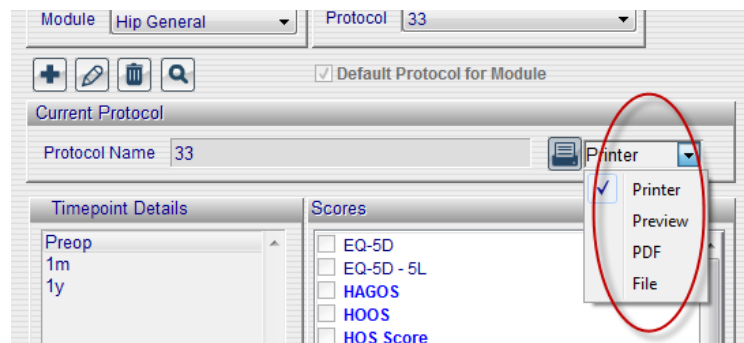
Select all the time points first. The one you are currently in will be displayed in red.

Once you have added all your time points go back to the first time point which is normally pre-injury or pre-op. Note that some scores are only relevant at the pre-op or a post op time point, and only these will be displayed when you select the relevant time point.

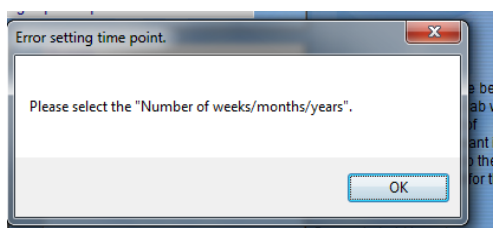
Highlight the first time point and go down the list of available scores and check the ones you want to send at that time point. The scores that are not in bold are not available as web scores. Then go to the first post time point and select the scores for that. If all the post op scores are going to be the same (or mainly the same) at all post op time points, you can select the icon shown below, and it will populate all the post op time points with the same scores. You can still go to each time point and modify or remove some if necessary. Once you have finished click on the big green tick to save.



Voilà! You have just set up a new follow-up protocol. It's a good idea to print or preview the protocols out you can double check them. If you get it wrong and are using the web scores the patients will all get the wrong scores and/or the wrong time points... So, it's important to spend some time setting them up correctly.

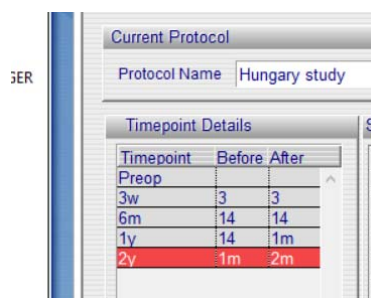


If you forget to add a number to a time point which needs it, (e.g. weeks, months, years) you will see this message.



BEFORE AND AFTER TIME POINTS

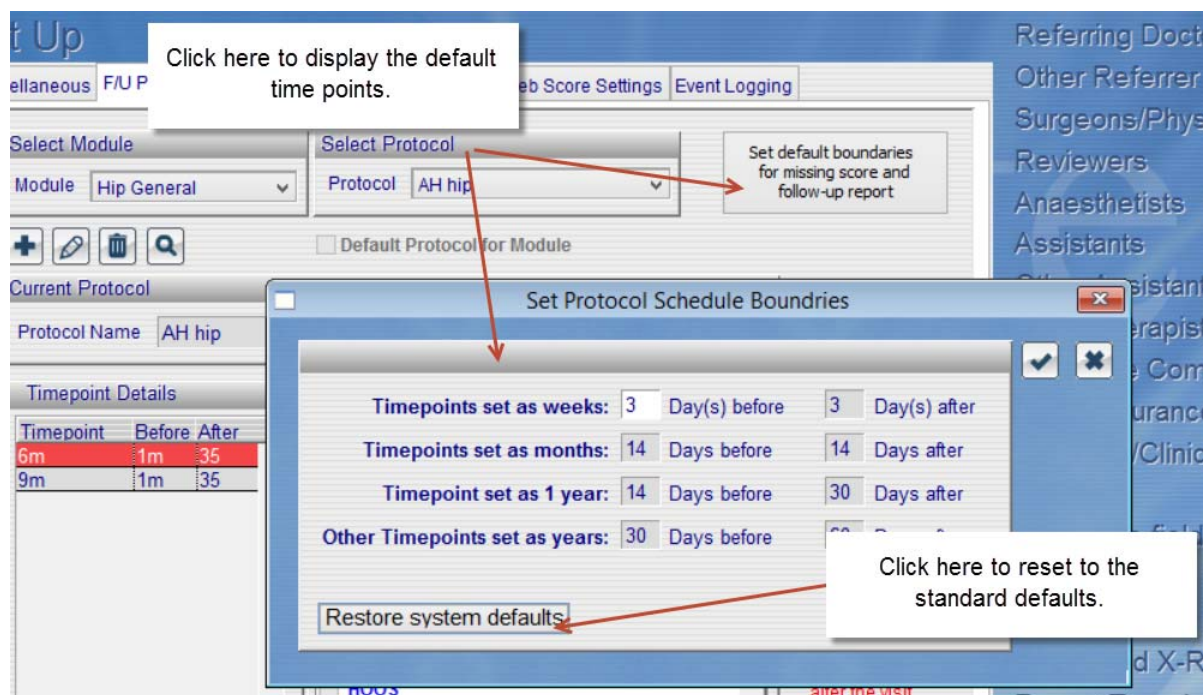
After the time point you will see two columns labelled Before and After. These are set at the defaults days as seen in the screen print below.



Timepoint	Before	After
Preop		
3w	3	3
6m	14	14
1y	14	1m
2y	1m	2m

WEB USERS – DO NOT ALTER THESE.

Some reports use these days to detect whether scores or surveys are due, current or overdue. However, they have no bearing on the time points the web scores are sent out. If you are a web score user and you change these before and after time points your reports will not reflect the same due, current or overdue time points that the web service uses.



Bottom line, **do not change these if you are using web scores.** At some stage in the future it will be possible for users to dictate when their web scores are sent out and when they become invalid, but at this stage the web score time points are set.

If you are a new user these will be set at a default days as above. If you are an existing web user and have changed them you should change them back to the default. To do this select the protocol you want, use the modify icon and change the days to the default as above. If you don't do this some of your reports may show up as scores being still current or overdue when they are not as the reports use these time points to check for due current and overdue.

Please read the chapter on reports for a more detailed explanation of what this feature is used for the non-web score Users.

The time points for the web scores are in the next screen print.

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.

SELECTING A DEFAULT PROTOCOL

You can elect to have one of your protocols for each module set up as a default so that when you add a surgery record it will automatically populate the protocol field. This means that when you add a record to anyone in that module this protocol will already be selected. You can change it if you want on the individual record, or select the blank line at the top if you don't want to add that specific protocol or want to change it later. This is usually only useful if all, or the majority, of the patients in a module are in the same protocol.

MISSING PROTOCOL MESSAGE

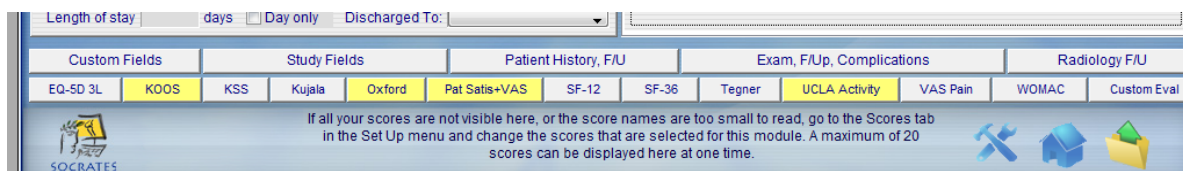
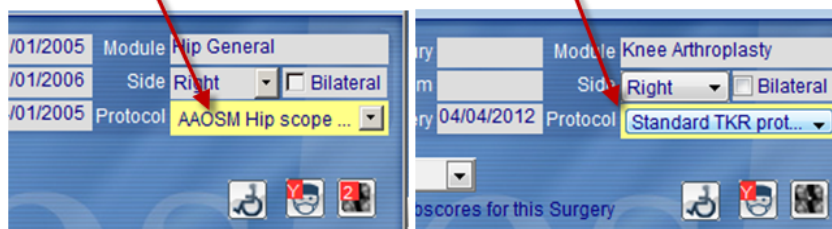
Given the importance of the follow up protocols to the web scores, there is a warning message (which can be disabled if it drives you nuts) if a protocol is not selected when setting up a new surgery record.

HIGHLIGHTED PROTOCOL

The protocol selected for the surgery record will be highlighted in yellow, as well as on the tab which displays the name. Note: Due to the idiosyncrasies of the operating systems (Mac, Windows) some sites will see the whole field in yellow others will only have a yellow border. The scores selected for that protocol will also be highlighted in yellow.

Some will see this

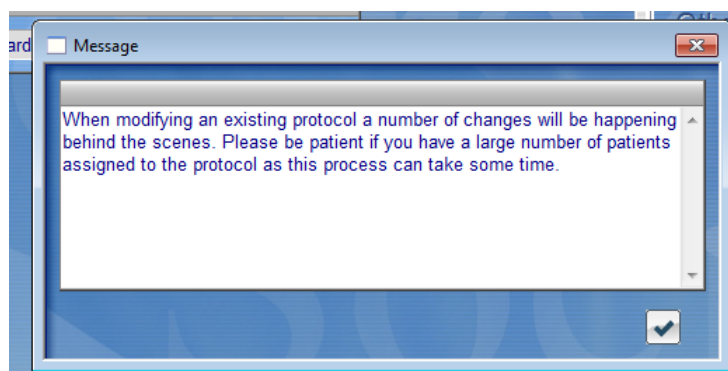
Others this



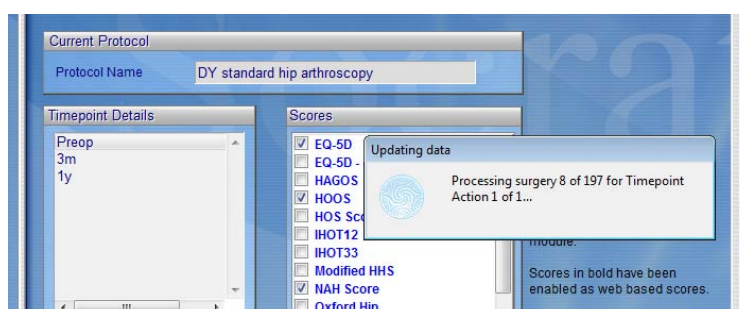
MODIFYING AN EXISTING PROTOCOL

There will be times when you may want to change either scores or the time points in an existing protocol. To do this go to the Protocols tab in the Set Up screen, select the modify icon for the protocol you want to change.

Important: Keep in mind that if you make changes here it will affect **every** surgery which has been assigned that protocol. Once you are in modify mode, highlight the time point, or the score/s you want to change and select or unselect the scores, or add or remove the time points. When you have finished making all the changes click the green Save icon. You will see this message.



Select the tick then a progress bar will tell you how you are travelling. Don't interrupt the process. If you have several thousand surgeries do this at the end of the day when you don't need to use Socrates.



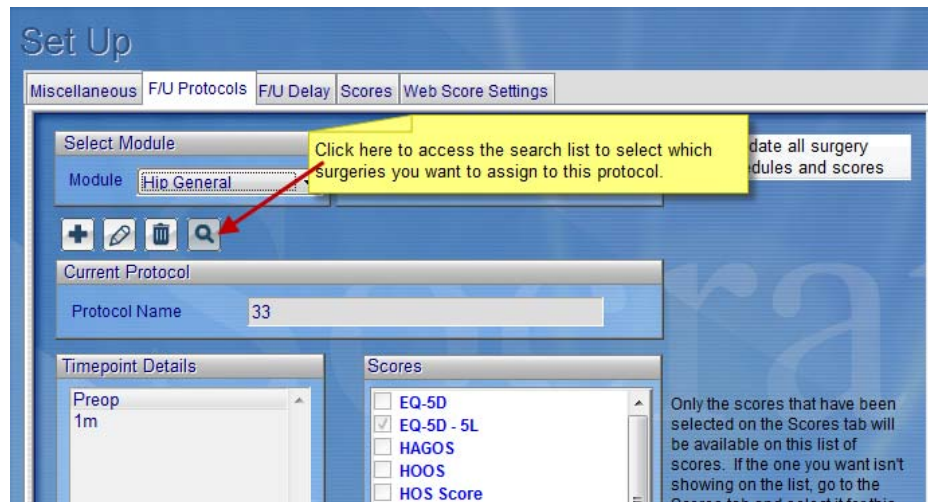
If you are using web scores the next time Socrates sends or receives mail it will need to send all of the records in that protocol to the web server again. So don't be alarmed if it tells you it's sending a lot of web scores as every record in the altered protocol has to be re-sent to the server so those patients will now get the new scores or time points as per the changes you made.

ASSIGNING A GROUP OF SURGERIES TO A PROTOCOL

It's possible to assign a group of surgeries/records to a protocol without having to do it manually for each one. This is done by using the search function to select which surgeries you want, then assigning them to an existing protocol. This is useful for sites with a big database that want to start using the web scores, or just want to assign their surgery records to a protocol which previously didn't have one to enable them to keep track of them and use some of the new reports.

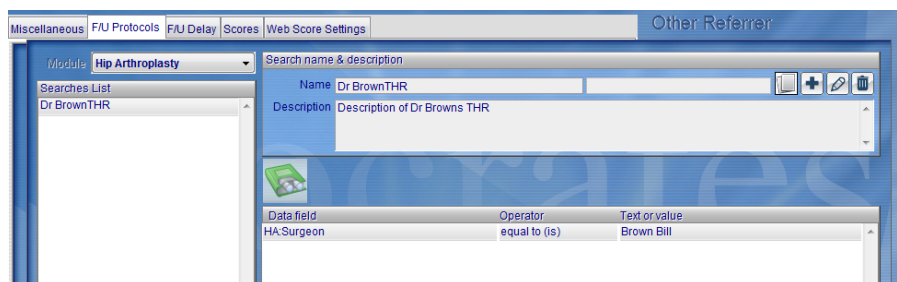
Note that you can only assign protocols to surgeries that don't already have one. Any surgeries that already have a protocol allocated will need to be changed manually.

You will need to know how to use the basic search function to be able to use this function.



Here's how to do it:

- Go to Follow Up Protocols in the Set Up screen.
- Select the module and protocol you want to assign your selection of surgeries to.
- Click on the search icon (next to the rubbish bin icon) which will bring up the standard search window.
- Use the search function to select the group of surgeries you want to assign to the selected protocol. It will only bring up those that fit the search criteria that do not have a protocol assigned. This example is looking for Dr Browns surgeries. You can select any combination from the search list.



- Once the list has populated check that you have the correct protocol at the top of the screen, then the correct list of surgeries. If the list you see is what you want, select the green tick. You will see a message asking you to confirm that the details are correct, if so check the tick and the surgeries listed will now have that protocol assigned to them. If it's not, select the cross and start again.

Assign protocol to selected surgeries

Module: This is the list of surgeries that meet the search criteria shown at the bottom right, and that do not already have a protocol assigned to them.

Protocol Name:

Module	Patient	Patient ID	Date of birth	Gender	Study(ies)	Surg date	Surgeon	Side
Hip Arthroplasty	DEYER	Ruby	78654	04/05/1966	Female		Brown, Bill	Right
Hip Arthroplasty	LASTIME	Fre	4566	06/07/1955	Male		Brown, Bill	Right
Hip Arthroplasty	NEBET	Reg					Brown, Bill	Right

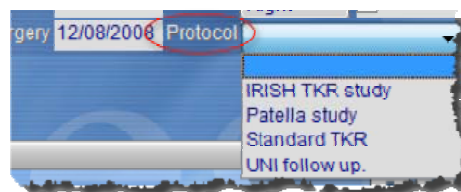
☐ Message

This will assign the selected surgeries to the "Hungary study" protocol. If the list of surgeries is large and you are using the web score data entry service, this process may take some time as the web server must be updated with all scores due at the relevant time points.

Do you want to continue?

CHANGING TO A DIFFERENT FOLLOW-UP PROTOCOL FOR AN INDIVIDUAL SURGERY

You can change the protocol you follow in an individual surgery record at any stage. Just go to the Surgery History Screen, click on the [Modify icon](#), and choose a different option from the pull-down menu in the Protocol field on the top right. If you want to remove a patient from any of the protocols listed, select the blank line option.



Note: If the patient status on the Surgeon Follow-Up Screen has been changed to any of the options other than Ongoing the patient will automatically be removed from the follow-up list.

Outcome

Patient Status: ☐ No further Follow up

Date of death:

It's important to keep this up-to-date if you want your follow up reports to only reflect those you still want to follow. Also, if you are using the web scores this is the only way the program "knows" not to send out the next scores due. It checks the ongoing status before it queues any follow ups to go out. This is found on the examination and follow up screen.

HOW IS THE FOLLOW-UP PROTOCOL INTEGRATED INTO THE PROGRAM?

Once you have set up and selected a follow-up protocol for a new surgery, Socrates calculates the next dates a follow up score is due based on the time points you have chosen in the protocol you selected for that particular surgery. Additionally, the patient's name will appear on the Missing Scores Report if there is not a follow-up visit entered prior to, or on that scheduled date. See more in the chapter on Reports.

Remember that in order for a patient to be logged as having attended an appointment (and therefore having been followed up with a record of that visit) a score with a date or follow up period has to be entered into Socrates.