

Reports

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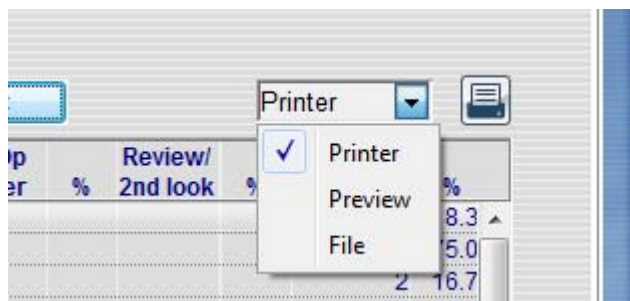
There are number of reports which can be generated automatically from Socrates. These are accessed from the Reports icon on the Home screen.



Note that the web reports will only be visible if you are using the web scores.

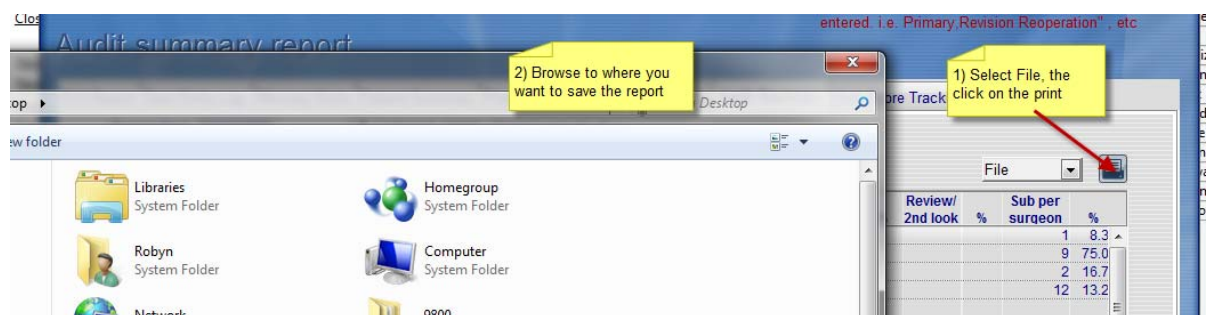
PRINTING/SAVING/VIEWING THE REPORTS

All the reports have a print icon which allows the option of printing, previewing or saving the report to file. In general, if you want to print the reports it is better to save them to file, then open in excel where you can format them as required and ensure that they fit the page, and then print them from excel. If you do print them directly from the screen, make sure that the print format is set to landscape as they are too wide to fit on a portrait page.



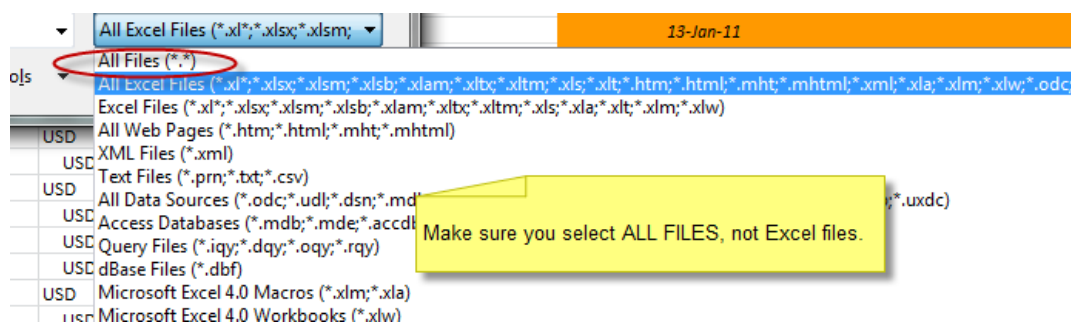
SAVE TO FILE

Select the file option then click on the print icon. You will then be prompted to name and save the file.

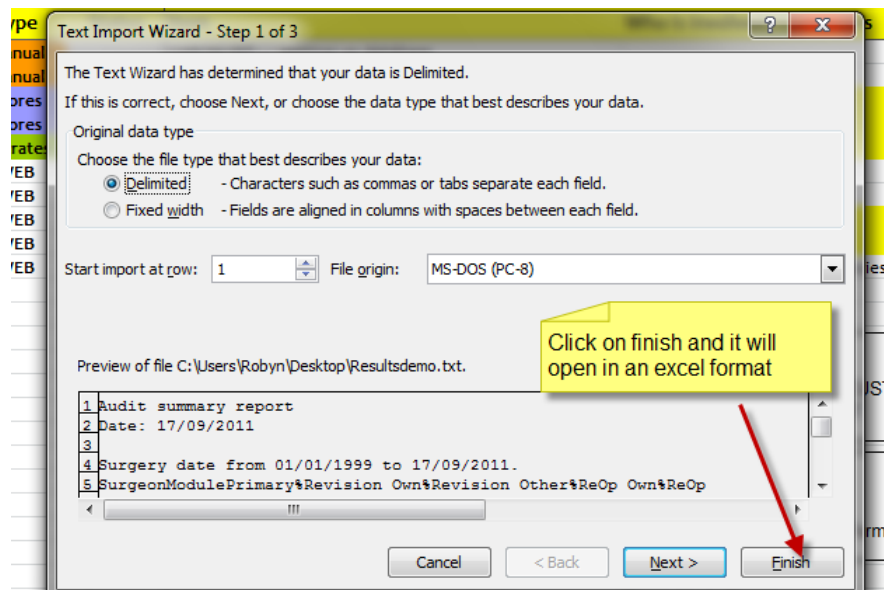


The file is initially saved as a text file as below. This format is not friendly for printing or formatting so it's better to follow the instructions below and save it as an excel file.

To open into excel format, start excel, then select OPEN, making sure that you select ALL FILES not just Open All Excel files, as at this stage the file is saved as a .txt file. If you don't do this you won't be able to see the file where you have saved it.



Once you have opened the file you will see this Text Import window, Select finish and it will open into an excel format. When you want to save this file, make sure you select the *Save As* option and save it in an excel format if you want to open it next time in excel. Otherwise you will have to repeat the same steps as above each time you open it.

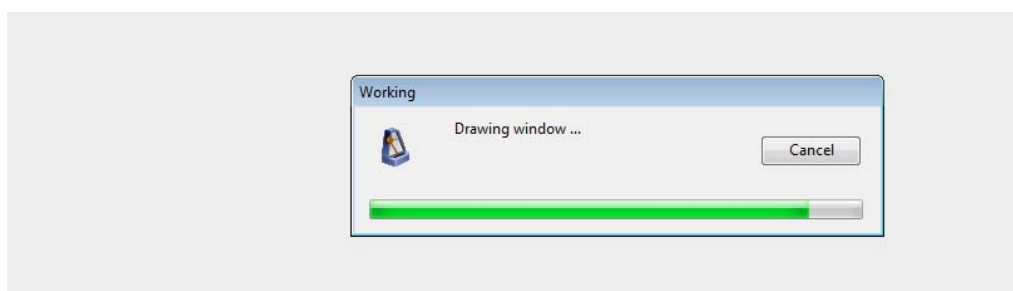


This is a section of an audit report in excel format.

Audit summary report									
Date: 17/09/2011									
Surgery date from 01/01/1999 to 17/09/2011.									
Surgeon	Module	Primary	%		Revision Own	%	Revision Other	%	Re
BURWOOD, Tim	Hip Arthroplasty	0			1	25	0		
BURWOOD, Tim	Knee General	8	15.1		0		1	100	
BURWOOD, Tim	Shoulder	1	25		0		1	50	
Total		9	11.4		1	20	2	33.3	
DALLAINE, Godart	Hip General	1	11.1		0		0		
DALLAINE, Godart	Hip Arthroplasty	0			1	25	0		
DALLAINE, Godart	Knee Arthroplast	0			0		2	100	
Total		1	1.3		1	20	2	33.3	
DONALDSON, Mary	Hip General	1	11.1		0		0		
DONALDSON, Mary	Knee General	16	30.2		0		0		
DONALDSON, Mary	Elbow & Hand	1	100		0		0		
Total		18	22.8		0		0		

RETAINING THE REPORTS IN MEMORY

The reports are retained in memory until you exit from Socrates. This means that if you have run a report and then need to return to the main part of Socrates or check on an individual patient record when you return to the reports you will not have to generate the report again. There may be a slight delay as the report redraws; you will see this message on the screen.



PROTOCOLS

A number of these reports require the records to have been allocated a protocol before they will display any results. They need a protocol assigned to be able to know what scores were selected, and when they were due to be able to produce the report. You can use the search function in addition to the protocol to further segment the group you are looking for. See the next paragraph.

Patient summary report

Audit Summary		Web Score Tracking		Web Scores Sent		Web ID's		Unsubscribes / Bounces						
F/U Report		Data Entry Log		Missing Scores		Patient Summary		Protocol Summary						
Module	Hip General	<input type="text" value="Search details. If empty include all."/> <input type="button" value="Generate report"/>		<input type="checkbox"/> Select date entered range										
Protocol	Hip Scope Athletes													
Mod	Protocol	Score	Patient	Surg Date	Side	Date Entered	Score	Follow-up period	Result name	Preop score	Latest score	% change	Prev score	% change

USING THE SEARCH/SELECT FUNCTION

Most reports include the standard search function to enable you to select a sub set of patients within the protocol group. You would use the search to look for sub sets of records. For example, you only want to run the report for records in that protocol for male patients over 60, for a selected study or surgeon. Anything that is recorded as a field or combination of fields in Socrates can be used as a filter in a search.

Missing score report

Use the Search to find a subset of records

Web Score Tracking		Web Scores Sent		Web ID's		Unsubscribes / Bounces	
F/U Report		Data Entry Log		Missing Scores		Patient Summary	
Module	Hip General	<input type="text" value="Search details. If empty include all."/> <input type="button" value="Generate report"/>		<div> Success Missing Not required Not yet due Outside of schedule Current Now </div> <input checked="" type="checkbox"/> Only dated surgeries			
Protocol	Hip Scope Athletes						

FOLLOW UP (F/U) REPORT

The follow up report will allow users to run a report on which patients/surgeries are due back for follow up between the date ranges that you enter. This report will only display records that have scores that HAVE NOT been filled in. Therefore if you ran the report in the middle of the month with a date range from the 1st to the 31st but a particular patient had completed all their scores due at that time point prior to that, this patient's record would not show up.

If you ran the report for the prior month this would show you everybody who was due that month and had not completed their scores.

Report Next Scores Due

Enter the date range here

Use the search function to select a subset

Click here to generate the report

Date the scores are due and end based on the days before and after set days

Next Scores Due		Data Entry Log		Missing Scores		Patient Summary		Protocol Summary		Complications		Audit Summary	
Next Scores Due From		01/04/2014		To		30/04/2014		<input type="button" value="Generate report"/> <input type="button" value="Printer"/>					
Module	Patient	Patient ID	Surgery date	Side	Last F/U	Last F/U Date	Next F/U	F/U Begins	F/U Ends				
Hip General	VDAVNI	Ijikoktuk	29/03/2012	Right	12m	10/04/2013	2y	29/01/2014	29/05/2014				
Hip General	IDMLTZ	Pytnkhe	24/02/2012	Left	12m	13/03/2013	2y	26/12/2013	25/04/2014				
Hip General	MSEMM	Squu	09/02/2012	Left	12m	27/02/2013	2y	11/12/2013	10/04/2014				
Hip General	VNTTDM	Akxppyq	16/06/2011	Right	12m	11/07/2012	3y	17/04/2014	15/08/2014				
Hip General	BQNY	Joitvk	11/06/2012	Right	13m	09/07/2013	2y	13/04/2014	11/08/2014				

In order for the program to “know” who is due back and when, the surgery record ***must have been assigned to a protocol***, which will have the score schedule specified for those time points. Thus, if you assign surgery a protocol which has a preop and 6 month follow up, once you have entered a surgery date, you can call up the date 6 months from that date and that record/surgery will appear on the list as being due. Even if you are not using the web scores, this report will not function unless protocols are assigned to the records.

If you are an existing user and don't have your records assigned to a protocol it is quite easy to do this for a group of patients - i.e. all THR's rather than having to do it one record at a time. Contact us for instructions.

The two columns on the far right will display the date the follow-up first begins, and the last date that it is due. The days before and after it appears as beginning and ending are based on the days set as before and after in the protocol. In the example above the first patient had their surgery on 29 March 2012 and the next visit due according to the protocol is at two years. The default is set for 60 days before and after for the 2 year f/up and so the follow up shows as being due on 29 January, and ending on the 29 of May, which is two months either side. Note that occasionally these will vary by one or two days depending on leap year variations. The before and after days can be changed by the user - see below.

Changing the default days before and after

This function allows the user flexibility as to when they consider the scores are due or overdue to appear on the reports. For example - there may be a one year time point selected in the protocol but for that protocol, the site may consider that scores filled 2 months either side is still acceptable as being within their one year time point. They would like it to show up as being due 2 months before the one year set in the protocol, i.e. at 10 months and they don't consider it late until 2 months after, i.e. at 14 months. These time points can differ for each protocol.

Why would they be different?

There may be a default set of time points set for reporting for routine follow ups for your site, but if doing a specific study an IRB may specify how long before or after the visits the scores can be counted as being completed in the acceptable time frame. This may not be the same as you are doing for other records. Thus you can create a protocol for that specific study and set up the before and after parameters for that specific study.

On the set up screen in the Protocols tab you will see a small window “Set default boundaries for missing visit and follow up reports” If you click on this you can set up these for what you want as a standard for your database, or just leave the defaults as they are.

The default is set as follows:

Set Up

Miscellaneous | FU Protocols | FU Delay | Follow-ups & Scores | Web Score Settings

Select Module: Module **Hip General**

Select Protocol: Protocol **Amy**

☒ Default Protocol for Module

☐ Set default boundaries for missing visit and follow up report

Current Protocol: Protocol Name **Amy**

Timepoint Details

Timepoint	Before	After
Preop		
1m	10	10
2y	60	60
5y	60	60

Click on the before or after number to change visit window # of days.

Scores

- ☒ EQ-5D
- ☒ EQ-5D - 5L
- ☒ Global Rating of
- ☒ HAGOS
- ☒ HOOS
- ☒ HOS Score
- ☒ IHOT12
- ☒ IHOT33
- ☒ Modified HHS
- ☒ NASH Score
- ☒ Oxford Hip
- ☒ Patient Satisfaction+Pain (Postop)
- ☒ Patient Work and SANE/Pain
- ☒ SF-12
- ☒ SF-36

Timepoints set as weeks: 1 Day(s) before 3 Day(s) after

Timepoints set as months: 30 Days before 35 Days after

Timepoints set as years: 60 Days before 60 Days after

They do NOT alter the visit windows used by the web scores.

Click here to display or change the default time points

Referring Doctors

Reviewers

Anaesthetists

Assistants

Report Templates

History Field Requirements

Change Current Password

Help

Allow the windows to be changed per protocol

Set Protocol Schedule Boundaries

Timepoints set as weeks: 1 Day(s) before 3 Day(s) after

Timepoints set as months: 30 Days before 35 Days after

Timepoints set as years: 60 Days before 60 Days after

They do NOT alter the visit windows used by the web scores.

Click here to display or change the default time points

Referring Doctors

Reviewers

Anaesthetists

Assistants

Report Templates

History Field Requirements

Change Current Password

Help

- Weeks - 3 days before and after the assigned time point.
- Months - 30 days
- Years - 60 days

That means that if you left the 3 day default window for weeks and a 3 week visit is due on the 5th May for example, they would show up as being the due on the 2nd May, and would be overdue on the 9th

These intervals will be reflected in both the follow up report, the missing scores report and the patient's individual score summary. In other words whatever is selected before and after each time point will be what these reports show as being due, or overdue.

The default time points can be altered by clicking on "set default boundaries" on the top right of the protocol window. This will then change the default for all your protocols. If you have individual protocols which differ highlight that protocol, click the modify icon then click into the before and after time point for each time point and change the days accordingly. If your time points overlap or don't make sense they will be displayed in red and not saved.

Important Note: These time points **WILL NOT** affect when the web scores are sent out. They are sent out and remain due at set days before and after for each time point and won't be altered by changing these Timepoints. **They will only change the due and overdue dates displayed in the follow up and missing scores report.**

Below is a copy of the days before and after that the web scores are due and will expire. These can't be changed by users.

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.

DATA ENTRY LOG

This is a log of any entries made into the database for any record, it is a summary of what was done, when and by which user. You should enter a date range for this report when you generate it as the report will get very long over time. Make sure you only enter the date range that you need or you could be waiting a long time. If you don't enter a date range you will be prompted to do so.

Note that each patient also has their own individual data entry log which is accessed on their demographic screen, this displays a data entry log for their own records only. This is located on the far right of the patient's current demographic screen.

The screenshot shows the 'Patient Demographics' window. The patient's details are: Last name: CALDER, First name: Mark, Middle name: (empty), Gender: Male, Date of birth: 07/10/1982, ID: NJSIMLY556, Current Age: 31. To the right, the 'History' table shows two entries: 'Hip Arthroplasty Right' and 'Knee Arthroplasty Left'. The 'Latest activity' for the first entry is '14/04/2014'. A red circle highlights a document icon in the top right corner of the interface.

The audit/data entry report in the main reports section gives you a number of options. The first choice to make is to include the action type - what type of records you are looking to display. There are four options.

- All activities. This will display any records in Socrates that have had any data entered or modified. Once the modify or add icon has been checked and anything at all is changed/added it will show up on the log along with which user made the addition or modification.

- New records only - this will show any screens that have had new entries - if a new patient record, a new Surgery has been added, a new score added, a new complication, for example they will show up. If they have been modifications to any scores or screens, these will not show up if this option is selected.
- Changed records only - this will show any screens which have had any modifications made. It will not include new screens or records added.
- Deleted records only - this will show any screens or patient records that have been deleted.

Once you selected the action type it can then select the type of data you are looking for, you have two options.

- All records - this will display either all, new, changed or deleted records for any screen in the database.
- Patient records only - this refers to only the main demographic screen. If you wanted to see a list of any new patients that you have added to the database select New Records only and Patient records only. If you wanted to see anything new that has been added since a certain date you would select New records only and All records.

Date	User	Patient	Site	Side	Surgery Date	Action	Comments
23/04/2014 12:28	Admin	AADRALD Russell	Hip General	Left	01/01/2013	CRE	Creation of HOOS evaluation 20140423 (15m)
23/04/2014 10:09	Admin	AADRALD Russell	Spine	Right		MOD	Modification of Surgery history record
17/04/2014 10:23	Admin	GOODWIN Stephen	Hip Arthroplasty	Right		MOD	Modification of Surgery history record
17/04/2014 10:23	Admin	GOODWIN Stephen	Hip Arthroplasty	Right		CRE	Creation of Surgery history record
17/04/2014 10:23	Admin	GOODWIN Stephen				CRE	Creation of Patient record
15/04/2014 08:54	DavidY		Hip General			RUN	Run Search
15/04/2014 06:39	Admin					RUN	Run Statistics
14/04/2014 17:15	Admin	BAI AKIMAR lit	Knee General	Right		MOD	Modification of Surgery history record

MISSING SCORE/S 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 on the screen is colour coded. The colour coding is as follows:

Color	Meaning
Green	Success
Blue	Out of schedule
Red	Missing
Yellow	Not yet due
Grey	Not required
Orange	Current Now
Green with X	Incomplete
Grey with X	Not Ongoing
Grey with X	Deceased

Green – the correct score has been entered for the correct time point

Blue – a score has been entered but it is between the 2 selected time points. i.e. outside the schedule indicated in the protocol.

Red – there is no score entered for this time point.

Red and White dots - this time point is not yet due.

Grey – this score was not required for this time point. e.g. a post op satisfaction survey may be selected for the post op time points but obviously doesn't make sense for a preop time point so it would show up as grey for that protocol.

Red with yellow border Current Now - indicates that this is missing but in the current time point.

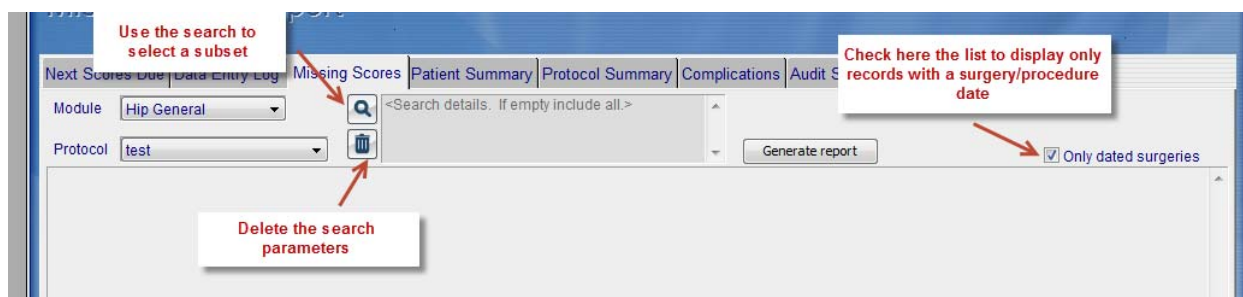
Green with Black Diamond Indicates that the score has had responses entered but a total could not be calculated due to insufficient responses. Note that this is only relevant where the scores actually have totals. For surveys such as the patient medical history where there is no total this will not show up as incomplete if they have missed responses. For the scores with multiple sub scores how they are displayed depends on the score. In general if there are scores which have sub score totals such as KOOS,HOOS,WOSI,WOOS as long as one of the major sub scores is present they will not show up as incomplete. For these scores it's not uncommon for patients to leave out sections that are not relevant to them. One exception is the Knee Society Score V1 where there are two sub scores, the score and the functional score. If one of these is missing it will show up as incomplete.

Grey with angled lines Indicates that the status for that record is no longer Ongoing. This could be for any of the reasons on the status list below. This can be changed on the surgeon exam and follow up screen or the tab history screen. For those using the web scores this is an important list as the web scores will not be sent out if the patient status is not Ongoing or they are Deceased. It's important to keep this current otherwise the system may continue to send web scores to patients who are no longer Ongoing for whatever reason, or have died.

Grey with horizontal lines – indicates that the patient is deceased and any scores due in the future obviously will not be completed.

Score	preop	1m	4m	1y	2y	3y	4y	5y	8y	10y	13y	15y	18y	20y
KSS														
Oxford														
UCLA Activity														

Surgery Dates - you can select whether to run all records in the protocol, or just those that have a surgery date by checking the "Only dated surgeries" box.



NOTE: Scores entered which are not included in a protocol will not show up on this report as Socrates has no way of knowing what scores are due at what time point.

The next example shows how the report appears when saved to Excel. The different responses are highlighted in the screen print below.

ADFMEY, I	27/07/2011	Score	preop	1m	4m	1y	2y	3y	4y	5y	8y	1
KA: Knee	27/07/2011	KSS	Success	Out of schedule	Out of schedule	Success	Success	Deceased	Deceased	Deceased	Deceased	
	27/07/2011	Oxford	Success	Out of schedule	Out of schedule	Success	Success	Deceased	Deceased	Deceased	Deceased	
	27/07/2011	UCLA Acti	Missing	Missing	Missing	Missing	Success	Deceased	Deceased	Deceased	Deceased	
	27/07/2011	VR-12	Missing	Not required	Missing	Success	Success	Deceased	Deceased	Deceased	Deceased	
	27/07/2011	WOMAC	Success	Out of schedule	Out of schedule	Success	Success	Deceased	Deceased	Deceased	Deceased	
ADNYDYE,	10/08/2009	Score	preop	1m	4m	1y	2y	3y	4y	5y	8y	1
KA: Knee	10/08/2009	KSS	Success	Missing	Out of schedule	Success	Success	Success	Missing	Not yet due	Not yet due	
	10/08/2009	Oxford	Success	Missing	Out of schedule	Success	Success	Success	Missing	Not yet due	Not yet due	
	10/08/2009	UCLA Acti	Missing	Missing	Missing	Missing	Missing	Missing	Missing	Not yet due	Not yet due	
	10/08/2009	VR-12	Missing	Not required	Missing	Missing	Missing	Success	Missing	Not yet due	Not yet due	
	10/08/2009	WOMAC	Missing	Missing	Out of schedule	Success	Success	Success	Missing	Not yet due	Not yet due	
ADNYDYE,	9/08/2010	Score	preop	1m	4m	1y	2y	3y	4y	5y	8y	1
KA: Knee	9/08/2010	KSS	Success	Missing	Out of schedule	Success	Success	Not Ongoing	Not Ongoing	Not Ongoing	Not Ongoing	
	9/08/2010	Oxford	Success	Missing	Out of schedule	Success	Success	Not Ongoing	Not Ongoing	Not Ongoing	Not Ongoing	
	9/08/2010	UCLA Acti	Missing	Missing	Missing	Missing	Missing	Not Ongoing	Not Ongoing	Not Ongoing	Not Ongoing	
	9/08/2010	VR-12	Missing	Not required	Missing	Missing	Success	Not Ongoing	Not Ongoing	Not Ongoing	Not Ongoing	
	9/08/2010	WOMAC	Success	Missing	Out of schedule	Success	Success	Not Ongoing	Not Ongoing	Not Ongoing	Not Ongoing	

INDIVIDUAL SCORE SUMMARY

At the top right of all screens underneath the Protocol you will see the Score Summary. This shows the status of the individual patient's record, both their scores, and the missing score summary.

The score summary will display the preop score, the latest and most recent score prior to that, and the difference between them. In the example below the Quick Dash score was 55 at the preop time point, the latest was 13 which is a 76% improvement. The score prior to the latest one was 30 which is a 57% improvement compared to the preop one. Note that 0 for the Dash scores is the best outcome.

If the scores have shown a decline the % decline will be displayed in red.

The code at the bottom is a graphic display of the status of all the scores and the selected time points.

Shoulder History and Examination

Patient name: CALDER, Mark
 Patient ID: NJSIMLY556
 Latest FUP: 2y
 Next FUP(s): 09/01/2015
 Surgery ID: 412978
 Password: Zy95Ahat

Injury: ☐ Exam: ☐ Side: ☒ Right ☐ Bilateral
 Surgery: 10/11/2011
 Protocol: Std instability
 Show score summary

Click to open Patient Login
 Enable Webscores for this Surgery

Score Summary for Surgery

Mod Protocol	Patient	Surg Date	Side	Score	Date Score Entered	Follow-up period	Result name	Preop score	Latest score	% change	Prev score	% change
SG Std instability	CALDER, Mark	10/11/2011	R	DASH	12/11/2013	-	Full Dash	-	-	-	-	-
				"	"	2y	Quick Dash	55	13	76%	30	57%
				"	"	"	Work	63	13	79%	25	48%
				"	"	"	Sport	69	6	91%	31	81%
				Oxf. Inst.	24/11/2013	2y	Score	6	48	>500%	26	85%
				SANE/Pain	12/11/2013	2y	%age of normal	20	90	350%	60	50%
				"	"	"	Pain Score	80	10	88%	40	75%

CALDER, Mark	Score	preop	6m	2y	3y	5y
SG: Std instability - 10/11/2011 - Right	DASH					
	Oxf. Inst.					
	SANE/Pain					

Legend: Success (Green), Out of schedule (Blue), Missing (Red), Not yet due (Red), Not required (Grey), Current Now (Yellow), Incomplete (Green), Not Ongoing (Grey), Deceased (Grey)

Close

PATIENT SCORE SUMMARY

This is a summary of all patients in all or selected protocols. It displays the latest follow up, the scores for the preop, latest and previous score, and the % change for each score. If any scores have deteriorated they are highlighted in red. Some of the % are meaningless when the numbers are small or very large so in some cases you will see a > or < 500% to indicate a major change. Some scores such as the Global Rating Of Change (GROC) just don't work in terms of the percentage improvement. Don't forget you can also use the search function to look for a particular patient, or a sub group. For example, how are the patients over 50 in my ACL protocol doing?

This report can be useful if you are using the web scores and not actually seeing the patient, it makes it easy to look down the column for the last visit and see anybody in red that might need following up.

Protocol name

Latest follow up period

Score Tracking

Web Scores Sent

Module: Knee General

Protocol: ACL ROUTINE

Generate report

Select date entered range

Choose all or selected date range

Mod Protocol	Score	Patient	Surg Date	Side	Date Score Entered	Follow-up period	Result name	Preop score	Latest score	% change	Prev score	% change
KG ACL ROUTINE	IKDC	CARTWRIGHT, Jenny	05/04/2011	R	04/10/2011	6m	Total Score	37.93	47.13	24%	-	-
		FENTON, Sue	05/04/2011	R	04/10/2011	6m	Total Score	49.43	71.26	44%	-	-
		HOWARD, Susan	06/10/2001	L	04/10/2011	10y	Total Score	-	78.16	-	-	-
		SUMMERS, David	01/10/2010	L	04/10/2011	1y	Total Score	41.38	90.8	119%	54.02	68%
		SUTTON, Beverley	05/10/2006	R	04/10/2011	5y	Total Score	44.83	87.36	95%	55.17	58%
		WILSON, William	05/04/2011	R	04/10/2011	6m	Total Score	50.57	73.56	46%	-	-
		WITHERS, Ted	05/10/2006	L	04/10/2011	5y	Total Score	-	77.01	-	-	-
		BRINK, Robert	01/06/2007	R	03/10/2011	-	Score	48	-	-	-	-
		CARTWRIGHT, Jenny	05/04/2011	R	04/10/2011	6m	Score	58	44	-24%	-	-
		FENTON, Sue	05/04/2011	R	04/10/2011	6m	Score	59	74	25%	-	-
		HOWARD, Susan	06/10/2001	L	04/10/2011	10y	Score	52	96	85%	-	-
		SUMMERS, David	01/10/2010	L	04/10/2011	1y	Score	52	100	92%	69	45%
		SUTTON, Beverley	05/10/2006	R	04/10/2011	5y	Score	46	62	35%	82	-24%
		WILSON, William	05/04/2011	R	04/10/2011	6m	Score	32	42	31%	-	-
		WITHERS, Ted	05/10/2006	L	04/10/2011	5y	Score	29	88	203%	-	-
		CARTWRIGHT, Jenny	05/04/2011	R	04/10/2011	6m	Satisfaction	-	77	-	-	-
							Normal	-	73	-	-	-
							Pain	-	27	-	-	-

Score names in protocol

Lysholm

Pat Satis+VAS

Date range

You have the option of looking for patient results for all data, or you can select data entered by the patient between selected dates. This is the date that the score was input into Socrates.

Over time your report will get very big so it's a good idea to select a date range or it could take a very long time to run the report.

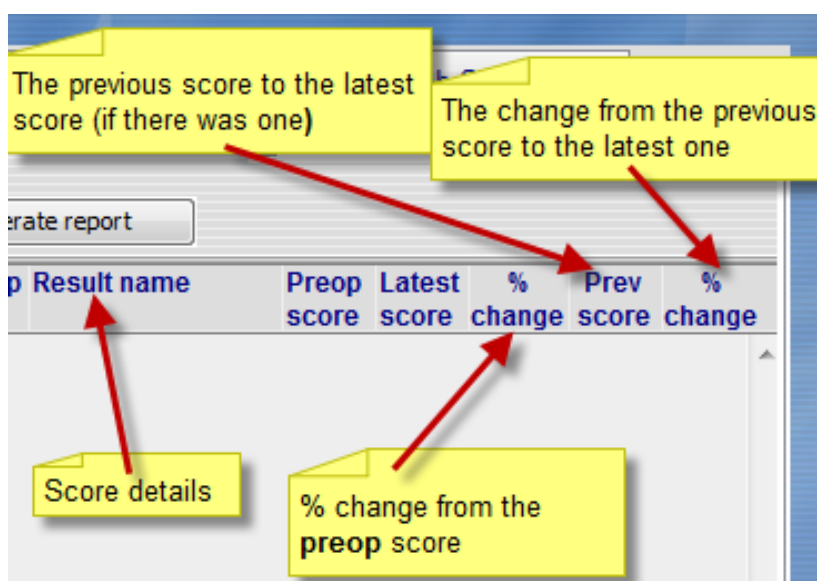
You also have the option to only select records which have had a date of surgery or procedure entered. Check the "only dated surgeries " option to display these.

Patient summary report

Audit Summary	Web Score Tracking	Web Scores Sent	Web ID's	Unsubscribes / Bounces
Next Scores Due	Data Entry Log	Missing Scores	Patient Summary	Protocol Summary
Module: Hip General	<input type="text"/> <Search details. If empty include all.>			<input checked="" type="checkbox"/> Select date entered range 09/05/2014 to 10/05/2014
Protocol: Hip Scope	<input type="button" value="Generate report"/>			<input checked="" type="checkbox"/> Only dated surgeries

Mod	Protocol	Score	Patient	Surg Date	Side	Date Score Entered	F/U period	Result name	Preop score	Latest score	% change	Prev score	% change
-----	----------	-------	---------	-----------	------	--------------------	------------	-------------	-------------	--------------	----------	------------	----------

The next screen shot explains the % change and time points.



We'll use Beverley Sutton as an example of this report.

- She is in the ACL protocol and the score here is the IKDC score.
- The last date the IKDC score was entered is the 4th October (or 10th April if you are in the US) and it was a 5 year follow up.
- Her preop score was 44.83, with the latest (the 5 year) being 87.36 which is a 95% improvement.
- Her previous score was 55.17 so the latest score of 87.36 is a 58% improvement on that.

Mod	Protocol	Score	Patient	Surg Date	Side	Date Score Entered	Follow-up period	Result name	Preop score	Latest score	% change	Prev score	% change
KG	ACL ROUTINE	IKDC	BRINK, Robert	01/06/2007	R	06/10/2011	0y	Total Score	40.23	83.91	109%	-	-
			CARTWRIGHT, Jenny	05/04/2011	R	04/10/2011	6m	Total Score	37.93	47.13	24%	-	-
			FENTON, Sue	05/04/2011	R	04/10/2011	6m	Total Score	49.43	71.26	44%	-	-
			HOWARD, Susan	06/10/2001	L	04/10/2011	10y	Total Score	-	78.16	-	-	-
			SUMMERS, David	01/10/2010	L	04/10/2011	1y	Total Score	41.38	90.8	119%	54.02	68%
			SUTTON, Beverley	05/10/2006	R	04/10/2011	5y	Total Score	44.83	87.36	95%	55.17	58%
			WILSON, William	05/04/2011	R	04/10/2011	6m	Total Score	50.57	73.56	46%	-	-

Further down on the report her Lysholm score is listed.

- The score was entered on the same date, and the latest is 5 years.

- The preop score was 46, the latest at 5 years was 62. This was a 35% improvement over the preop score.
- However the previous score to the 5 year one was 82 so in fact the latest score is 24% less than the previous one.

Lysholm	BRINK, Robert	01/06/2007	R	03/10/2011	-	Score	48	-	-	-	-
		06/10/2011	L	06/10/2011		Score	100	-	-	-	-
	CARTWRIGHT, Jenny	05/04/2011	R	04/10/2011	6m	Score	58	44	-24%	-	-
	FENTON, Sue	05/04/2011	R	04/10/2011	6m	Score	59	74	25%	-	-
	HOWARD, Susan	06/10/2001	L	04/10/2011	10y	Score	52	96	85%	-	-
	SUMMERS, David	01/10/2010	L	04/10/2011	1y	Score	52	100	92%	69	45%
	SUTTON, Beverley	05/10/2006	R	04/10/2011	5y	Score	46	62	35%	82	-24%
	WILSON, William	05/04/2011	R	04/10/2011	6m	Score	32	42	31%	-	-
	WITHERS, Ted	05/10/2006	L	04/10/2011	5y	Score	29	88	203%	-	-

Web score summary only




It's also possible to select this list for just those scores that have been entered using the web patient data entry. At the bottom left of the screen there are two tabs - select the tab "Web Scores Only" and you will see just those patients.



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 users 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 (number of records) the preop score, the % improvement at the last time point from the preop score, or a selected time point, and the average follow up for the group.

F/U Report	Data Entry Log	Missing Visits	Patient Summary	Protocol Summary	Complications	Audit Summary	Web Score Tracking	Web Scores Sent			
Module	Knee General		<Search details. If empty include all.>			Printer		<input checked="" type="radio"/> Latest Follow-up			
Protocol	ACL ROUTINE					Generate report		<input type="radio"/> Select timepoint			
Module	Protocol	Score name	Sub-score name	Average # preop	Mean F/Up	Median F/Up	Std Dev	#	Average	% Change	
Knee General	ACL ROUTINE	IKDC	Total Score	44	6	35m	1m	42m	8	76	73%
		Lysholm	Score	53	9	39m	12m	44m	7	72	36%
		Pat Satis+VAS	Satisfaction	-	0	39m	12m	44m	7	82	-
			Normal	-	0	39m	12m	44m	7	77	-
			Pain	-	0	39m	12m	44m	7	16	-
		Tegner	Activity Rating	2	7	25m	6m	27m	6	6	200%
		VAS Pain	Score	62	7	39m	12m	44m	7	22	65%

Time point - You can either select the latest timepoint for each surgery follow up, or select one timepoint only. In this example, 12 months has been selected. This is quick way of finding out how your patients are doing collectively at selected time points. The same data can be generated from the Descriptive statistics as well but it's not done with just one click.

COMPLICATIONS REPORT

This report summarises complications by date range based on surgery date, or the date of the complication. There are 2 tabs at the bottom of the screen - the first tab has details by patient, the next tab summarises the complications by surgeon and complication.

If no date range or specific module is selected you will receive this warning message below. It is possible to select ALL complications for ALL modules with no dates selected in either field but be aware that if you have a large database it might take a long time for the reports to populate.



Here's a screen shot of a list of complications from the knee general module.

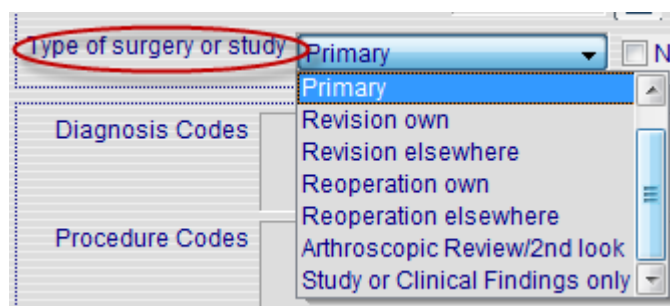
Mod Surgeon	Patient	Patient ID	Surgery Date	F/U	Comp Date	When	Wks Since	Reop	Re-op Date	Wks Since	Rev	Revision Date	Wks Since	Num Complications
BURWOOD, Tim	BAILEY, Martin	90962427	06/12/2000	29m	01/02/2003	Late	113	Yes			Yes			
	BAILEY, Martin	90962427	06/12/2000	29m	01/02/2003	Late	113	Yes			Yes			
DONALDSON, Mary	ARKWRIGHT, Trevor	479830	05/10/2002	6y										1 Deep Vein Thrombosis /
EDELWEISS, Martin	BRACEWELL, Larry	93821528	02/04/2003	5m	02/08/2003	Late	18				Yes			2 Arterial Injury / Chondral Graft h
	BRACEWELL, Larry	93821528	02/04/2003	29m	02/08/2003	Late	18				Yes			3 Infection - superficial / Arterial Ir
MARTENS, Freda	BROWNING, Barry	675342	02/11/2002	5y	03/10/2008	Late	309				Yes			1 Chondral Graft failure - other ca
TODGON, Neville	GILBERT, Donald	609312	07/12/2002	3m	01/03/2003	Late	13	Yes			No			

This is from the "totals" tab.

Totals		
Total surgeries that meet search criteria: 337		
Total surgeries with complications: 16		
Total occurrences reported: 16		
Percentage of surgeries with complications: 4.75%		
Module:	Hip Arthroplasty	9 / 186 : 4.84%
	Knee Arthroplasty	7 / 151 : 4.64%
Surgeon:	<unknown>	0 / 1 : 0.00%
	FTEOAVNI, Bjcti	2 / 18 : 11.11%
	GDSSDNIM, Jeyth	1 / 31 : 3.23%
	IOWVQTHQQ GDSSDNI,	0 / 1 : 0.00%
	IOWVQTHQQ SNYBQT	1 / 27 : 3.70%
	IOWVQTHQQ SNYBQT,	0 / 1 : 0.00%
	MLNTWQT, A*K*H	1 / 23 : 4.35%
	MLNTWQT, Akyn	1 / 30 : 3.33%
	NYBOTMEY, Alopp	3 / 68 : 4.41%
	SEXQ, Ltm	3 / 62 : 4.84%
	SNYBQT, Tldjyl	4 / 73 : 5.48%
	VETY, Pyxpkhxy*Aloppykq	0 / 1 : 0.00%
	YEL*WYEGY,	0 / 1 : 0.00%
Reoperation:	1	
Reop weeks since:	1	
Revision:	0	
Revise weeks since:		
Complication names:	<unspecified>	10 / 16 : 62.50%
	Dislocation	1 / 16 : 6.25%
	Joint Stiffness	2 / 16 : 12.50%
	Retained Foreign Body	1 / 16 : 6.25%
	Wound Dehiscence	2 / 16 : 12.50%
Named complications total: 5 Total occurrences: 16		

AUDIT REPORT

This report lists 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- or clinical findings/study only. Note that this report only selects surgeries or procedures which have the ***Surgery Type*** entered. If there is no type entered the report will tell you how many don't have a Type. You can then use the standard search to look for all *Surgery Type which is not defined* to identify these records.



Audit summary

Select a date range

Use the search icon to select a sub set, i.e data for only one hospital, or one insurance company.

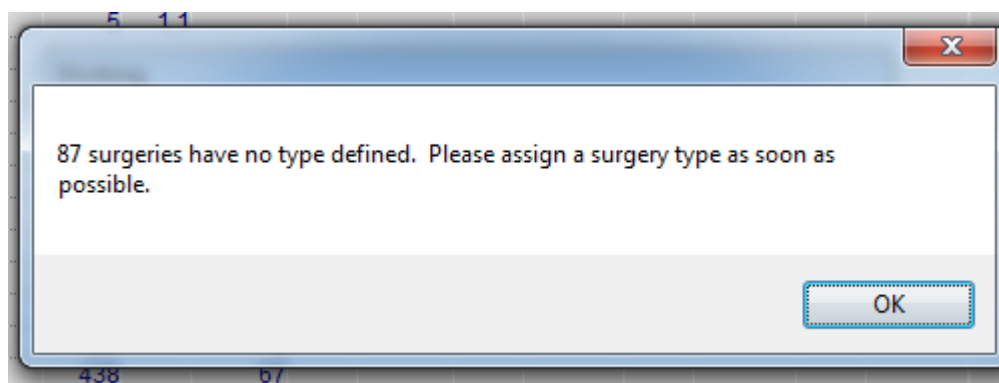
Surgery from: to: Search details. If empty include all. Generate report Printer

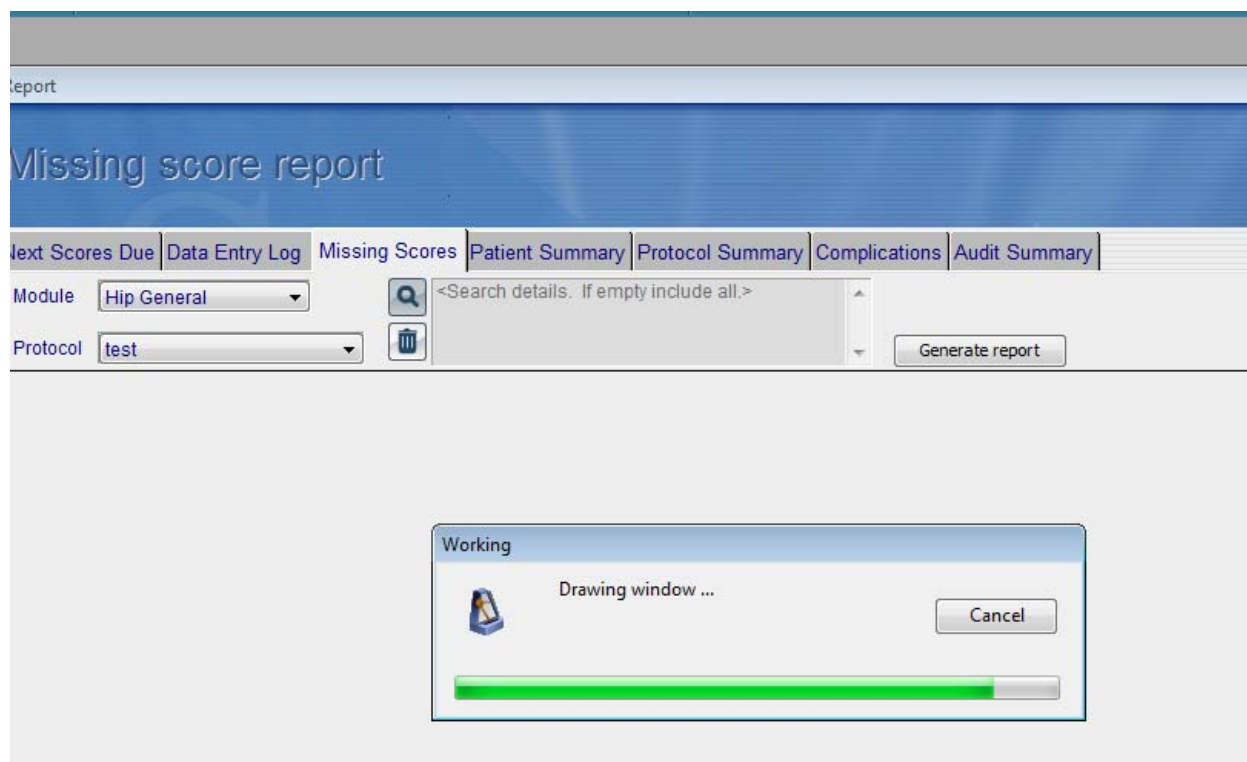
Surgeon	Module	Primary	%	Rev Own	%	Rev Other	%	ReOp Own	%	ReOp Other	%	Review/ 2nd look	%	Sub per surgeon	%
BURWOOD, Tim	Hip Arthroplasty			1	20.0									1	8.3
	Knee General	8	15.1			1	100.0							9	75.0
	Shoulder	1	25.0			1	50.0							2	16.7
	Total	9	11.4	1	16.7	2	33.3							12	13.0
DALLAINE, Godart	Hip General	1	11.1											1	25.0
	Hip Arthroplasty			1	20.0									1	25.0
	Knee Arthroplasty					2	100.0							2	50.0
	Total	1	1.3	1	16.7	2	33.3							4	4.3
DONALDSON, Mary	Hip General	1	11.1											1	5.6
	Knee General	16	30.2											16	88.9
	Elbow & Hand	1	100.0											1	5.6
	Total	18	22.8											18	19.6
EDELWEISS, Martin	Hip General	1	11.1											1	25.0
	Hip Arthroplasty	1	20.0											1	25.0
	Knee General	2	3.8											2	50.0
	Total	4	5.1											4	4.3
KERWOOD, Frances	Hip General	1	11.1											1	20.0
	Hip Arthroplasty					1	100.0							1	20.0
	Knee General	1	1.0											1	20.0

The report also totals the number of procedures for each "type" in the whole database for each surgeon. In the above example Dr Donaldson has done 16 Knee general Primary surgeries which is 30.2% of the total knee general surgeries in the database.

TOTALS BY MODULE															
	Hip General	9													9
	Hip Arthroplasty	5		5		1									11
	Knee General	53		1		1									55
	Knee Arthroplasty	5				2									7
	Shoulder	4				2									7
	Elbow & Hand	1													1
	Foot & Ankle	1													1
	Spine	1													1
	TOTAL	79		6		6									92

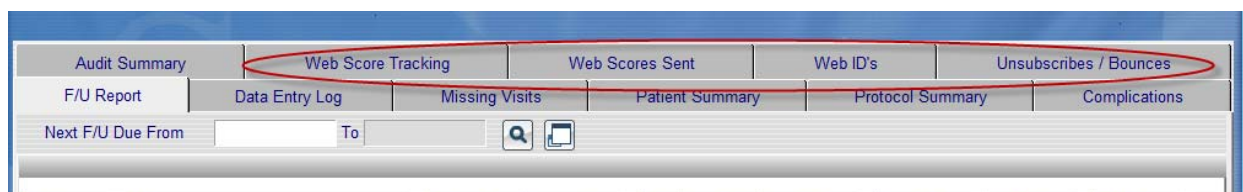
If there are some with no type assigned you will see this message. These can be found by running a search for surgeries where "surgery type is undefined"





WEB REPORTS

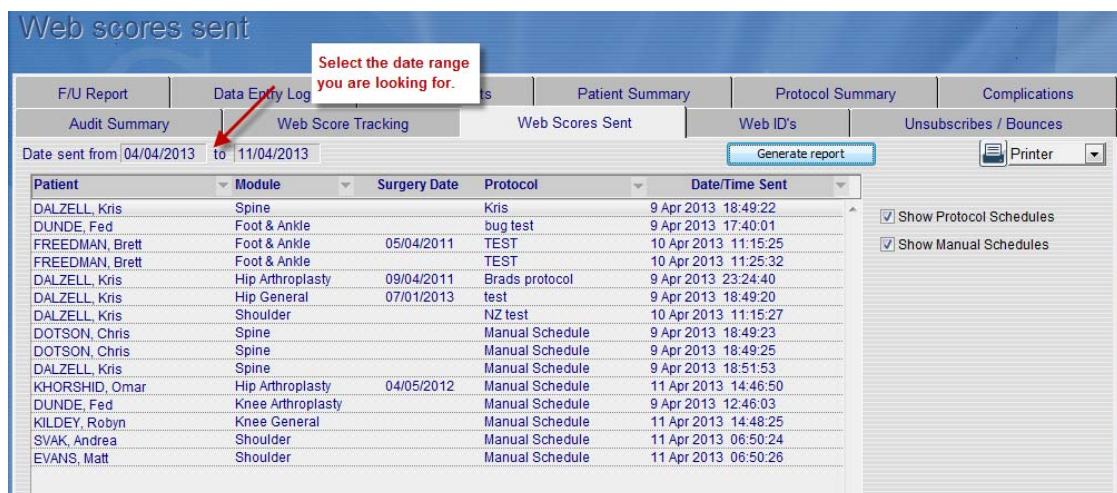
There are 4 reports which help track the sending and receiving of web scores. If you are not using the Web Scores these reports are not visible.



Web scores Sent

This report records what scores have been sent to the web server and when they were sent. It will default to the previous week, but you can select whatever date range you want. It lists the module and the name of the protocol. You can use the little down diamonds at the far right of each column heading to sort the list in the order you want. It is important to realise that this is the date details were sent to the web server, not the date that it may have been delivered to the patient. It's a little bit like sending the mail in advance to the post office, then leaving the post office to decide when to deliver it. As soon as a patient is added to the web score service all their scores due at whatever time points are selected and sent to the web server the next time Socrates sends and receives. They are then sent out at the due times from the web server itself. The only time a record is sent again to the web server is if you make a change. For example, you have set up a patient in THR protocol in 2012 which has the latest follow up at five years. In 2014 you decide that you want to add a 10 year follow up to this protocol. All the patient's records in that protocol will then have the details sent to the web server again since it now needs to send out an additional survey at 10 years.

To summarise, this report displays the dates when the details are sent to the web server, not the patient. It's really just a quick way of enabling you to check when you are sending web scores that the system is working.



Web score Tracking

This is an important report if you are using the web scores as it displays the time taken for the patient to complete the score, the method chosen (email or in clinic) and those that have not been completed.

It's important to know that this report will only display scores returned or if the time the survey it was due has lapsed they will show up as Not Returned. It does not display those that are in a current time point unless they have been returned.

The method chosen will be either email, or local score entry (LSE) which means that it was completed in the clinic by logging in rather than via an email link. If they are not completed by the due date they will appear in red as Not

Returned. They don't appear on the Not Returned list until the reminder has been sent for the email and the date due has passed. The reminder email will be sent at the half way point between when it was first sent and the due date. See the screen print for how long each time point is valid to and from. They won't appear on the web tracking report as Not Returned until the due date has lapsed.

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.

Manual Schedule

- Sent immediately, valid for 14 days. Reminder sent 7 days after initial email.

For example, if the follow up is a preop one which is valid for two weeks this would show as not returned on the 15th day after it was sent to the web server, with one reminder sent after 7 days. The link would tell the patient that there were no more scores to complete if they clicked on it after this date.

The time taken to complete is displayed in days. If it is returned the same day it will show as 1, the next day 2, etc. To select only those not returned, check "only display those not returned".

Due between – this will display scores returned or not returned between the dates that the scores are due based on their web protocol schedule.

Filter results by schedule

All schedules: this will return a list of all the web scores, those that were sent in a protocol and those set manually via the web.

Protocol schedules: this will display only those that have been sent from the actual protocol for the patient. If an additional manual score is sent even if the patient has a protocol it will not show up on this list.

Manual schedules: this will display the scores that are being sent that are outside of the protocol time point using the manual send and receive method.

Filter results by returned date

Any: this will display all results whether they have been returned or not.

Not returned: this will display only those that had not been returned in the due time point.

Returned between: if you enter a date range here it will display the status of any scores returned or not between those dates.

Tracking totals

The web tracking screen also has a separate tab which total the number of patients, protocols and scores that have been sent out. It will also show




- The average days to completion for both the email and the 'in clinic' method.
- Number of scores sent out at the different time points
- % returned and not returned.

Web Tracking Totals (Ignoring Filters)	
Protocol - Standard THA:	415/1,999 (21%)
Score - Oxford Hip:	207/998 (21%)
Score - Patient Satisfaction+Pain (Postop):	196/981 (20%)
Score - Patient Satisfaction+Pain (Preop):	12/20 (60%)
Follow-up - Preop:	24/40 (60%)
Follow-up - 3y:	0/2 (0%)
Follow-up - 6m:	88/712 (12%)
Follow-up - 1y:	205/810 (25%)
Follow-up - 2y:	25/89 (28%)
Follow-up - 3m:	73/346 (21%)
Average days for email:	12.3
Average days for local:	6.2
Average days for both:	12.1
Returned score method - email:	403
Returned score method - local:	12

Web ID's

This report will generate a list of all web IDs and password by protocol. You can select ALL protocols and use the search function to generate the ID's for a sub set. For example, search for all the ID's or records in a certain study, or belonging to a certain Dr. For an individual record you can also print the ID and password on the history screen of the individual surgery record.

Web ID and Passwords report

F/U Report	Data Entry Log	Missing Visits	Patient Summary	Protocol Summary	Complications			
Audit Summary	Web Score Tracking	Web Scores Sent	Web ID's	Unsubscribes / Bounces				
Module	All modules	 <Search details. If empty include all.>		 Printer				
Protocol	All protocols			Generate report				
Patient Last Name	Patient First Name	Patient ID	Module	Protocol	Surgeon	Surgery Date/Start Date	Web ID	Web Password
DONALDSON	Don	375858	Foot & Ankle	Army	unknown	06/04/2011	394481	5n4qJS6w
			Knee Arthroplasty	Test	unknown		394479	maQr76N7
KILDEY	Ribyn	2233	Foot & Ankle	Army	unknown		394477	X6mQELo6
			Hip Arthroplasty		unknown			
			Spine	Army	unknown		394480	7vrMZRTA
SMITHERS	Ron	148759	Knee Arthroplasty	Test	unknown		394478	6nQ636NS

UNSUBSCRIBE/BOUNCED

This report displays any emails which have either bounced or unsubscribed. Those that have unsubscribed will also automatically have had their method of notification changed to reflect this and are no more emails will be sent out. If you contact the patient and they agree to resubscribe you need to change this back to email on the notification tab.

Unsubscribes/Bounces report

F/U Report Data Entry Log Missing Scores Patient Summary Protocol Summary Complications

Audit Summary Web Score Tracking Web Scores Sent Web ID's Unsubscribes / Bounces

Date From 23/07/2013 to 30/07/2013 Generate report

Patient	email	Type	Log Date/Time
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