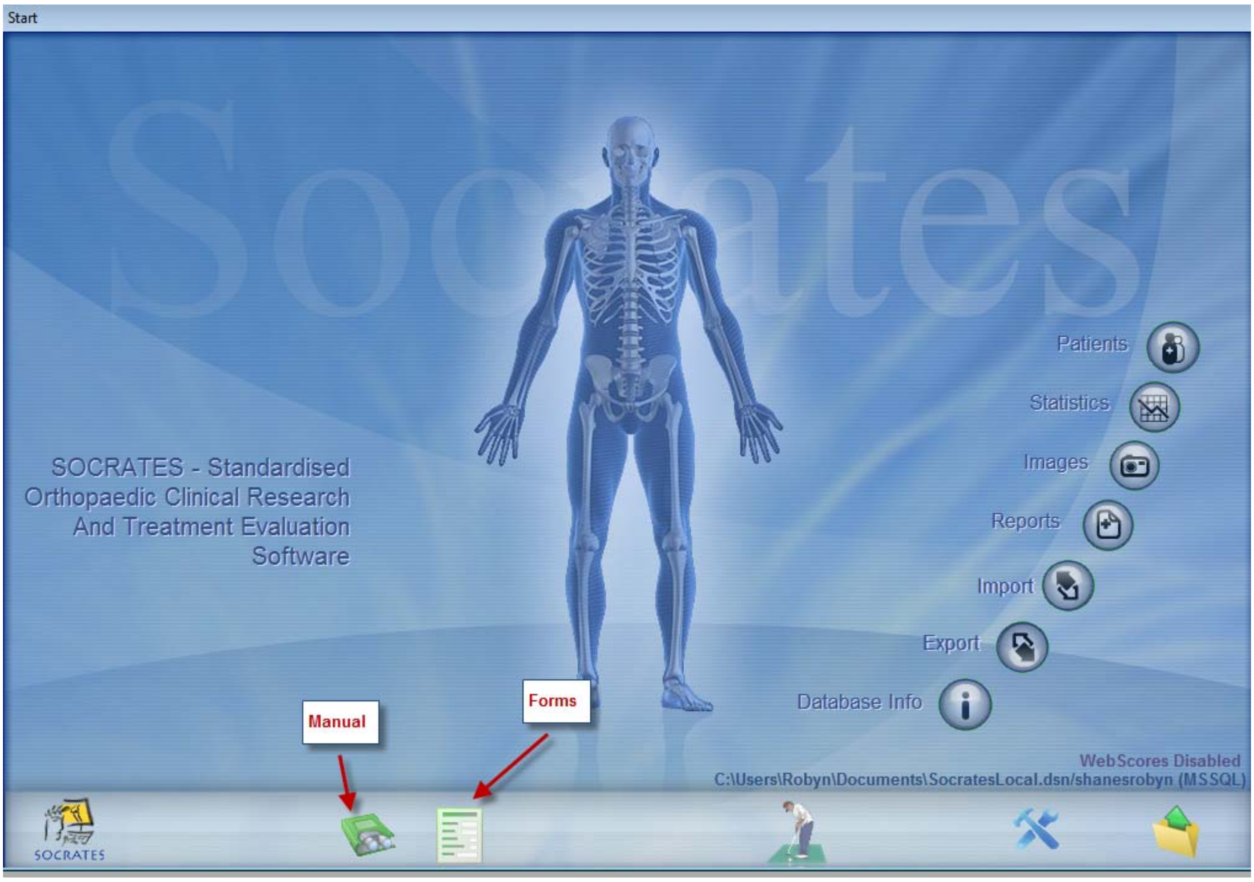
Set-Up and Customisation

This chapter is important to read thoroughly, especially when you start using Socrates. Many of the features that make this program such a powerful tool for your research and Practice, are embodied in the way you customise the screens and fields of the program. Therefore, spend some time reading this chapter, it covers the contents of the Home Screen and the Settings Screen. Remember, the Settings Screen is accessed from all screens by way of the Tools icon.

THE HOME SCREEN

Here's where it all begins… from this screen, you have access to all Patient data, Statistics, Images, Reports, Import and Export of data, and the Database particulars. The manual and forms are also accessible from the icons at the bottom.



Patients

Click on the Patients icon to view the clinical records for your patients. All patient history and surgery data, scores, follow-up complications, and searches are accessed from here.

Statistics

This is where you make all those data points work for you! Once you have collected enough data to generate some meaningful statistics, read more detail on this function later in the chapter on Statistics.

Images

Clicking on this icon provides you with access to all the images in the database. Additionally, images for individual patients can also be accessed directly from the patient records. Note: images can't be imported directly into this screen; they are imported into individual patient surgery records through the Patients icon, and are available here as a slide show, and for export only. Read more detail on this function later, in the chapter on Images.

Reports

There some ready-made reports which are really handy to help you track your patients. See the chapter on Reports in the User Manual for more details on these reports. Note that the web reports will only be visible if you are using the web scores.

- Lists of who is due or overdue for follow up.
- An overall data entry log which tells you which user entered data on which screens and the date and time.
- Summaries of score results – preop vs. latest, or at selected time points. These also show the % differences between the preop and last visit, and a comparison between the latest and the previous time point making it easy to track patients individually or by protocol.
- Missing visit reports - a colour coded report showing patients compliance with the protocols and displaying scores or those that were outside the selected time points.
- Protocol summary – this report gives a summary of all scores for all protocols, the mean and median preop and last scores, the average follow up and the % changes. It's an easy way to be able to assess your outcomes for a group assigned to a protocol.
- Complication report – this summarises all complications by surgeon, type, delay, intra op, early, late, and outcome.
- Audit Report – a summary of all procedures done by surgeon broken down into the Type, Primary, Revisions, Reoperations etc, the % of the overall total.
- Web reports – this report shows the sent and return rate of the scores for the patient completing their scores via the web. It also displays the list of ID's and surgery for use if they are filling their scores online in the clinic, and those who have unsubscribed from the email.

Import

This handy little button allows you to import all those demographic fields and some additional fields relating to any previous procedures you already have in your other systems, directly into Socrates. This can be done as a one-off event, or at recurring times. We can also write you a custom import which may allow you to import additional fields from your EMR, providing your EMR can export data into a text or excel file. Contact us for more details. See the chapter on Importing for more details. If you are going to run an import you MUST read the chapter first.

Export

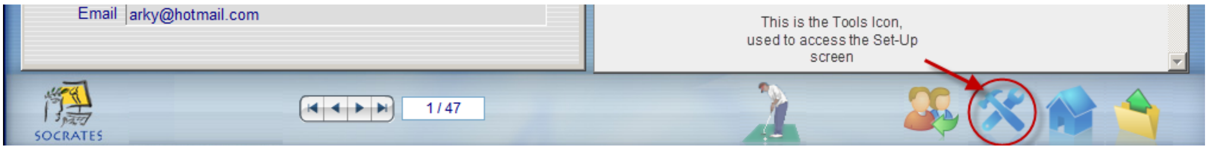
This is the portal for exporting all the Socrates scores and fields into .txt files, which can then be opened by Excel and other stats packages for more sophisticated statistical work, if need be. See the chapter on Exporting for more details.

Database Info

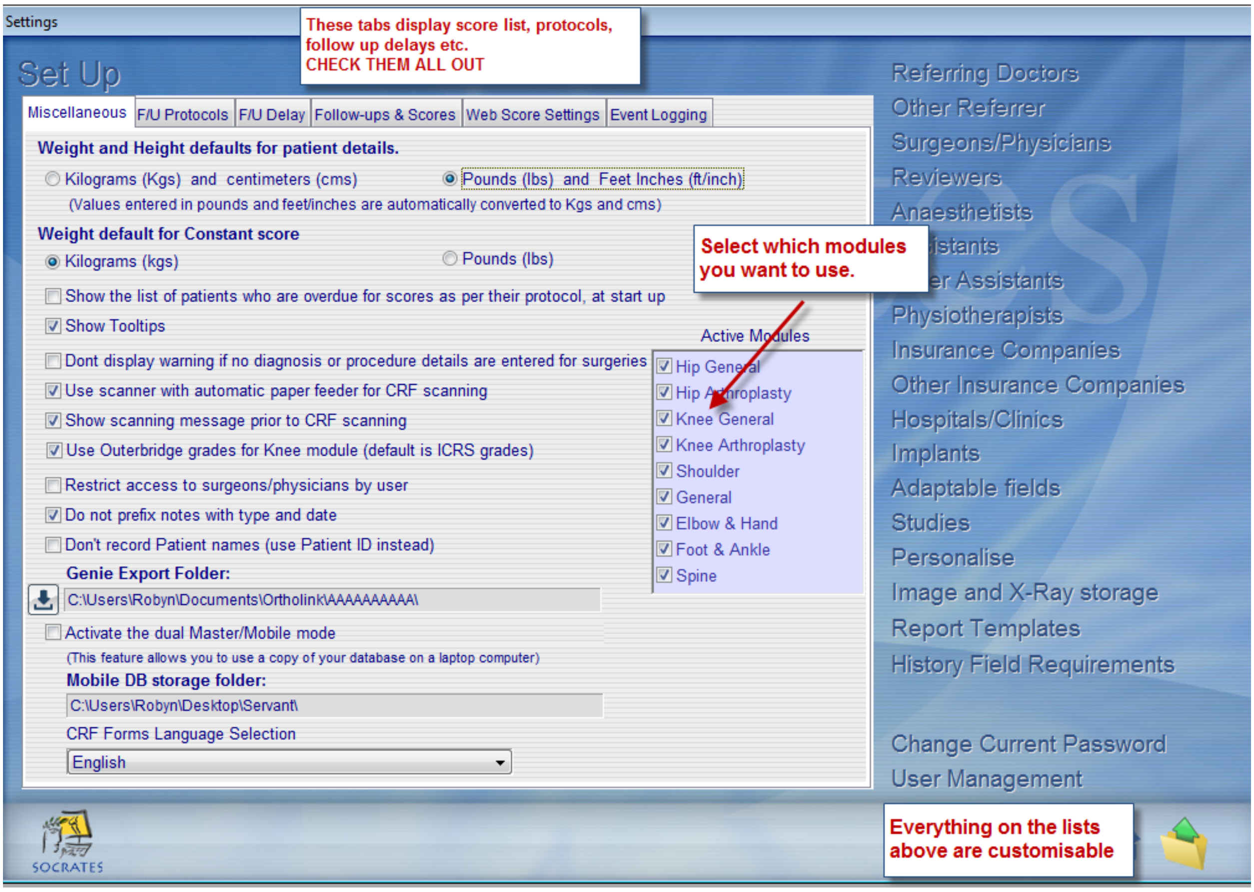
Behind this button is the cave in which all the details about file size, location of the database and software bits live. See the chapter on General Technical Information.

THE SET-UP SCREEN

The Set-Up Screen is important. As mentioned throughout this manual, this screen can be accessed from all screens in the program by clicking on the Tools icon (hammer/wrench and spanner) at the bottom of any screen, and from all of the Adaptable Fields windows. It's important that you become familiar with the features of this screen before you start using the database otherwise you won't be using Socrates to its full potential. The Set-Up Screen allows you to customise Socrates to suit your own needs.



The Set-Up Screen is organised into a set of tabbed sub-menus, an "Active Modules Box", and a list of customisable options down the right side of the screen.



Active Modules

The first decision you need to make is which module(s) you are working on, and therefore which ones are available to view. From the Active Modules Box, check the modules you want, and un-check those that are not relevant to your work.

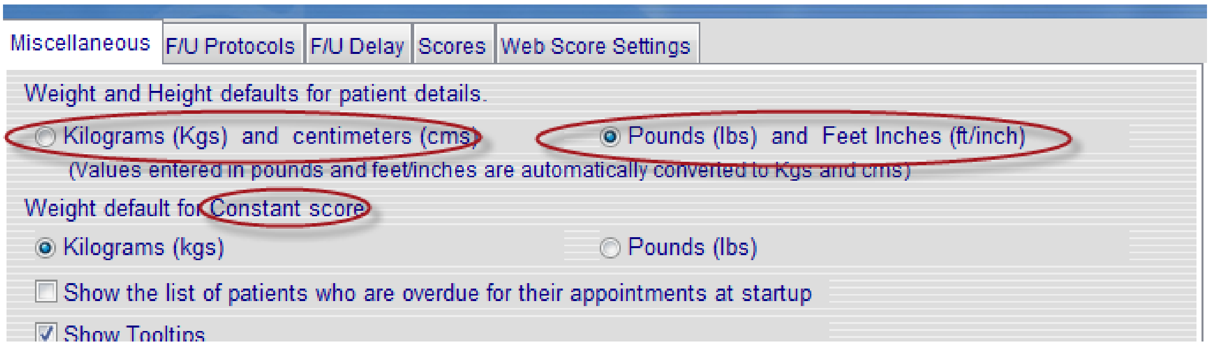
Then, under the miscellaneous tab, determine the ways you want the following information displayed:

Weight and Height Parameters

Choose the option that is appropriate for your region: metric or imperial. Note: All data is stored in the metric system. If you enter data specific to the US - pounds, feet, and inches, the program will convert the data to kilograms and centimetres for storage and analysis.

It also gives you the option of choosing how you want the strength question set for the Constant shoulder score.

Message Prompts



From the following list of options, decide which will be useful for you. Check the ones you want; un-check the ones you don't. It's a good idea to leave them all as they are until you become familiar with the program; you can select or deselect options later.

Automatic Generation of Overdue Patients List

If you have determined the follow-up protocols you want for a type of patient or surgery, and patients are late for their follow-up appointments, this option allows for an Overdue Report to appear every time you start the program. If you don't want to see this report at each start-up, leave it unchecked. Obviously, you can reactivate this option at any time, when you want to see the overdue patients, or you can generate the same list by going into the Reports section of the program. (See more in the chapter on Reports.) Note that the box is un-checked by default.

Tool Tips

After you become familiar with the program, you may decide you no longer need to see the tool tips.

Message if Diagnosis or Procedure Details Incomplete

These fields are important. If you don't include a diagnosis or a procedure name in the General Modules, it is difficult to do good research and data analysis. If you forget to include either of these fields, a message will prompt you to fix the problem. We recommend you leave this option checked. That said, there may be times when you don't want to enter them, or the reminder just gets on your nerves, so we've given you the option of deselecting it if you prefer. This option is checked by default.

Scanner with Automatic Document Feeder

We recommend you use a scanner that has this capability, in order to capitalise on data entry speed and accuracy. In this case, leave the box checked.

Show Scanning Set-Up Message before each Scan

You can disable the scanner resolution message after you initially set up your scanner to work with Socrates. This option saves you a click each time you use the scanner. You do need to see it the first time, to make sure that your scanner settings are correct, but after this you don't need to see it again (unless you buy a new scanner). After initial set-up, we recommend you un-check this box. Read the chapter on Scanning Forms for full details.

Select ICRS or Outerbridge Classification Score

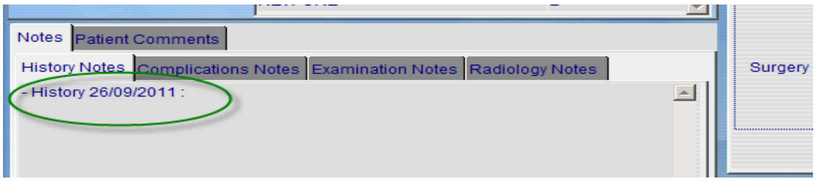
The Knee Arthroscopy screen gives you a choice of using either of these classification scores. Select which one you want. The ICRS is selected by default. It will enable the Chondropenia score to be calculated from the arthroscopy screen.

Restrict access to surgeons by user.

This allows you to nominate which surgeon's data each user is allowed to view/maintain. If this is required, you can either assign Users to Surgeons via the Surgeon maintenance screen, or Surgeons to Users via the User maintenance screen. Once it's checked only those with administrator access can unselect it.

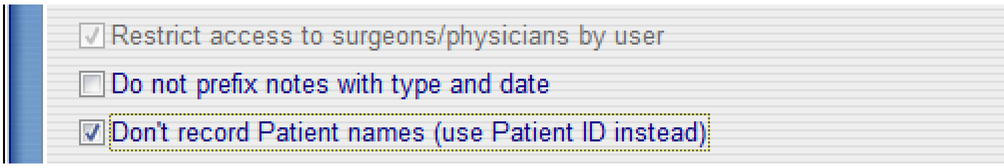
Do not prefix notes with type and date.

When entering notes into the system (any kind of notes, e.g. History notes, examination notes, complications), if you leave this unchecked, the system will automatically prefix the first line of notes you type with the type of note and the current date. If you check this box, these details will not be included.

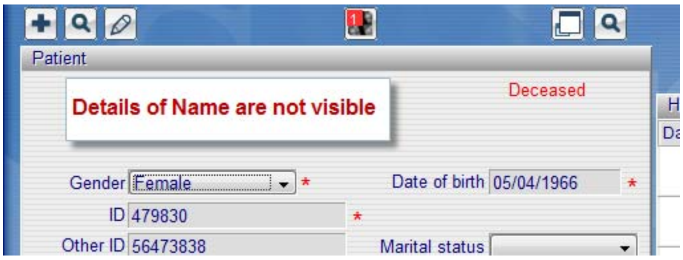


Don't record/display Patient Names (use patient ID instead)

Some sites do not keep the patient names on the database. If you select this option…



…this is what you will see on the demographic screen.



GENIE Export folder

This is a feature for Australian and NZ users who use Genie software for their medical record. It enables users to export operation reports, and any other reports generated from Socrates directly into a folder where the Genie software can retrieve it, and file it with the rest of the patient's record. See the chapter on "Working with Genie".

Activate Dual Master/Mobile Mode

Socrates Dual Mode system allows switching between the two different databases, as well as automatic updating between the two. However this option is no longer supported for new users from Jan 2013.

CRF Forms Language selection.

Some of the scannable forms are available in other languages. If you select the language, then print from the print icon on the screen for that score, if it is available it will print out in that language.

PASSWORD / USER MANAGEMENT

One of the first tasks is to set up your own user ID and password. Go to the chapter on Password and User Management for how to do this.

FOLLOW UP PROTOCOLS

Setting up and managing your follow up protocols is a really important part of Socrates, particularly if you are using the web scores. They enable you to select what scores you want for which records, and when they are sent out. Please read the separate chapter on Protocols for how to set these up and manage the ongoing process.

FOLLOW-UP DELAYS

The next tab in the Set-Up Screen allows you to determine how you want the follow-up time points to be displayed. The delays are stored in the program in days; you can decide whether they will be displayed as weeks, months, or years in the screens and how they will be available for statistics and searches. The default settings are shown below (weeks for up to Year 1; months for Years 1 & 2; years for Years 3+). You can modify these at any time, and the follow-up delays will automatically be recalculated.

For purposes of consistency, Socrates considers that follow-ups are *retrospective,* starting with the date of surgery (or procedure). Thus, a two-week follow-up is two weeks *after* surgery, and a 2-year follow-up is actually *in* Year 3, and so on.

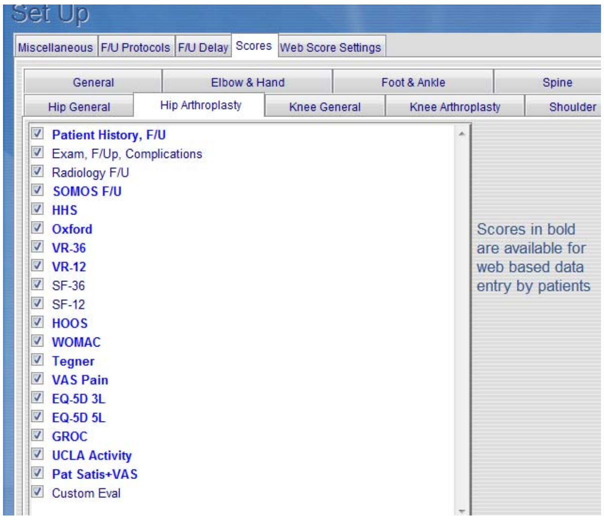
The following "rules" apply when calculating dates:

- Days: The program doesn't deal with days. Anything before day 8 will show up as 0w if you have selected the first year to display in weeks, 0m if you've selected months.
- Weeks: Week 1 starts with Day 8.
- Week 2 starts with Day 15…etc.
- Month 1 starts with the first day of the following month.
- Year 1 starts the day after the anniversary of the surgery.

We've rounded off the months, since it got too complicated trying to factor in leap years for what might be a 25-year follow-up, and we decided a few days either way didn't really matter. Thus, when you are looking at early follow-up in weeks or months, the dates might be a couple of days out to compensate for the months with a different number of days in them. Year's kick in work on the anniversary of the surgery or start date.

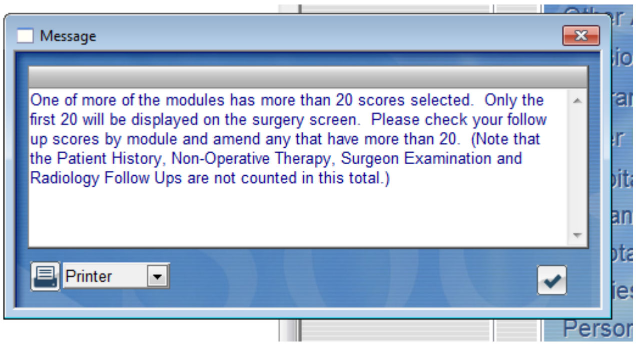
SCORES DISPLAYED

This tab enables you to specify which Scores you want to be displayed for each module. The scores chosen here will appear as tabs across the bottom of the History Screens.



A quick look at the module tabs under the Scores tab in the Set-Up Screen will provide you with a list of the scores currently available within each of the modules. The complete list for all the modules is available in the Scores/Surveys chapter.

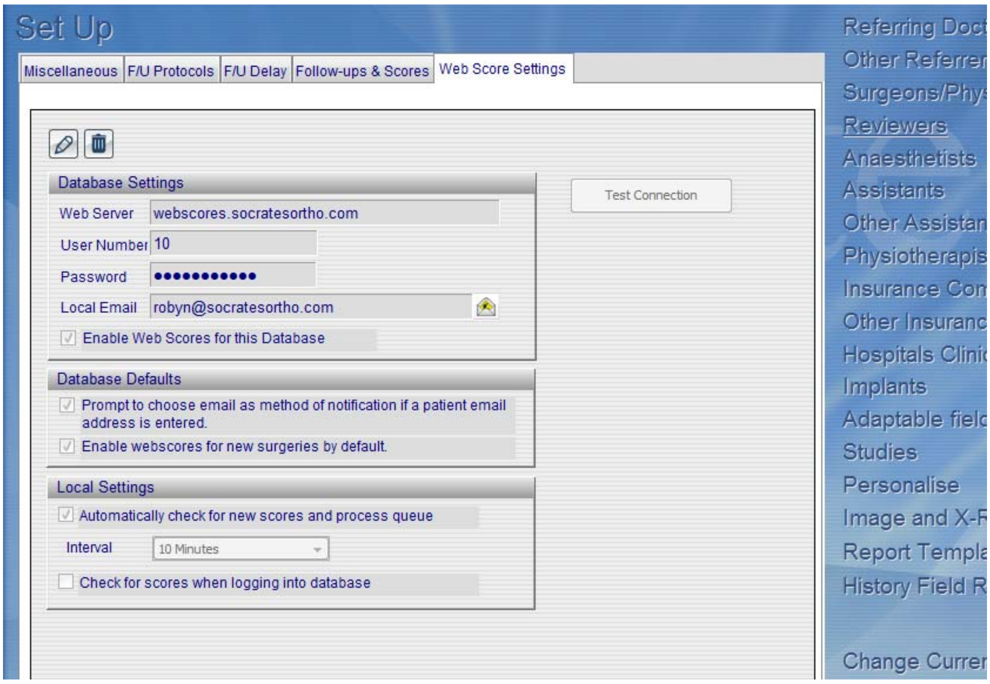
The scores in bold indicate that they are available for web data entry by the patient. If you select more scores to be displayed than will fit on the screen, you will see this message:



If they are in yellow it means that score is included in the protocol selected for that record.

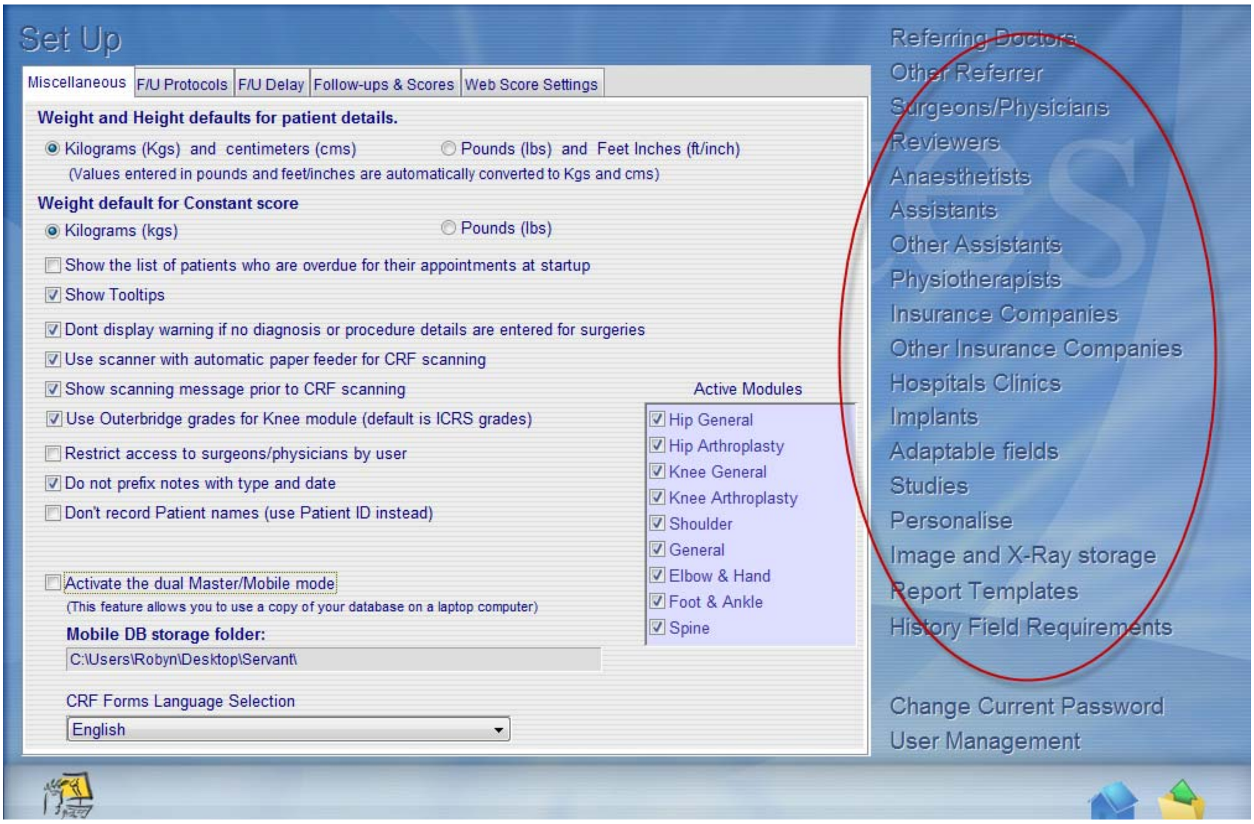
WEB SCORE SETTINGS

This is where you would set up your account and settings to enable the **electronic web-based data entry** for patients. See the chapter on **Web Scores** for more details.



ADDING YOUR OWN DETAILS

Back at the Set-Up Screen, we'll call your attention to the list of options down the right side of the screen. These headings allow you to further customise Socrates to suit your specific practice. These fields are normally empty when you first start using the software.

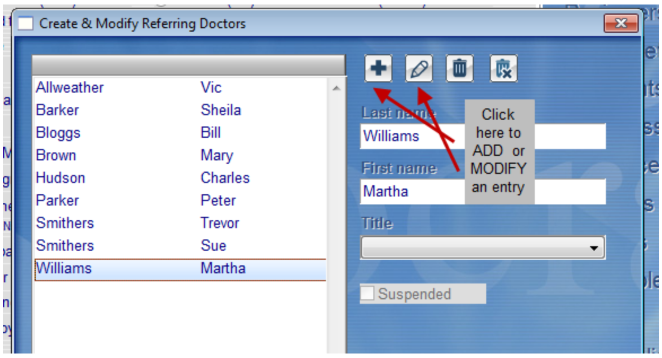


Adding names of surgeons, assistants hospitals, insurance companies

The first seven options on the right side of the Set-Up screen are all customised in the same manner. These headings are:

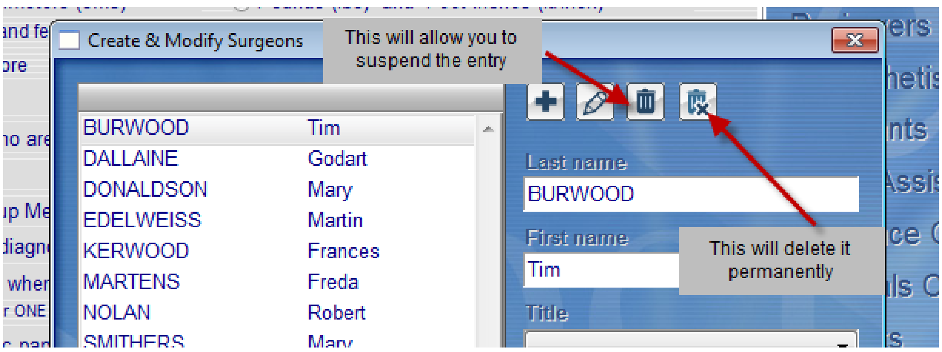
- Referring Doctors
- Other referrer
- Surgeons/Physicians and reviewing Dr's
- Reviewers
- Anaesthetists
- Assistants
- Other Assistant/Nurses
- Physiotherapist
- Insurance Companies
- Other Insurance Companies
- Hospital Clinics

To add or modify any of these options, click on the heading, and after the new window opens, click on the Add icon (blue cross) or modify icon.

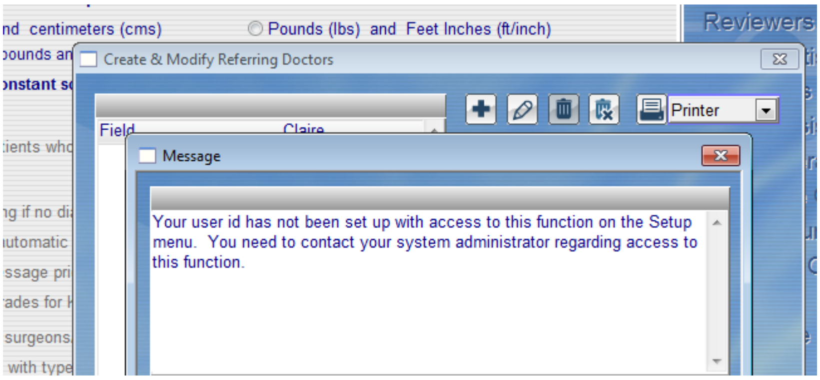


The cursor appears in the first field, in this case, Surgeon's Last Name. Type in the surname, and tab to the next field, here, the Surgeon's First Name. Select a title, if you wish, from the drop-down menu, and click on the **blue tick icon** to accept the data. You will see the new entry added to the window on the left. If you make a mistake in typing, simply click on the **Modify icon** (pencil) to change it.

To delete an entry, click on the **Delete icon** (bin) with the X on it, but *be aware that this action will delete any reference to the contents of this field on all existing patient entries.* Don't worry: you'll be asked to confirm the delete before all is lost! You wouldn't normally delete these fields permanently if there are any records where they might be used. Maybe you would delete one if you have made a mistake and it's in the wrong place, but otherwise consider using the **suspend function** described next, if you no longer need this field.

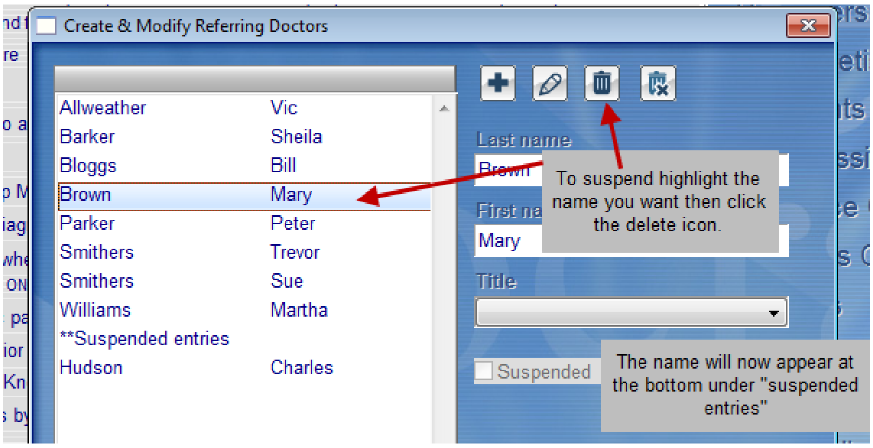


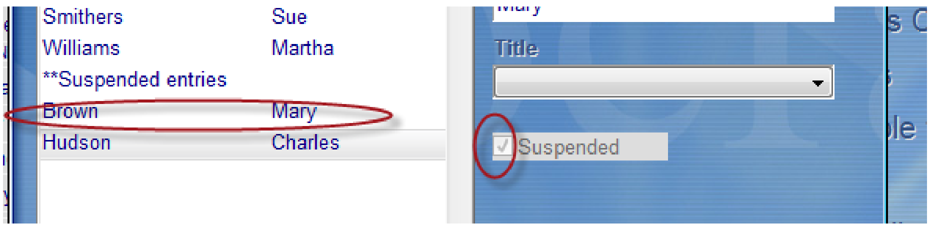
If you are not an administrator you will not be able to delete, or modify any of these once they have been added.



Suspending a field

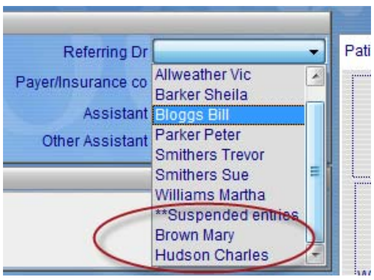
It is possible to suspend certain fields which are no longer needed, e.g the anaesthetist may no longer be working in that team, the GP has retired, a study has been completed, implants no longer used, or the Insurance Company has gone broke – these are a few examples of when this might be handy. In these cases it's possible to make any of these fields inactive by suspending them. They are still available for searching and statistics but appear at the bottom of the main list under "Suspended entries". If you want to put them back for any reason use the modify icon, then un-check the "Suspended" check box.





This is how they will appear on the screen.

You can also suspend Implants and Studies if they are no longer being used.



Un-suspending a field

If you change your mind about an entry being suspended, select the modify icon, then uncheck ‘Suspended’ and they will pop back up to the top part of the list.

Deleting fields

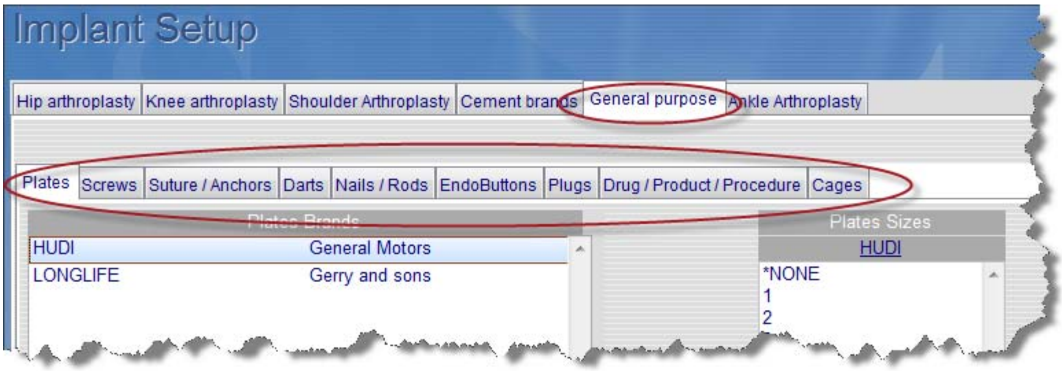
You would not normally delete any of these fields, unless you have made a mistake before you entered any patient data. Even though the surgeon may have left the hospital, or the implant is no longer being used you will almost certainly need to use the data for data analysis. The patient is still in the system, and that surgeon operated on them using that implant.

IMPLANTS

The next category on the Set-Up Screen that you can (and certainly *will*) customise is near the middle of the column on the right: Implants. Select the module you are interested in from the tabs along the top of the Implant screen, and then choose one of the tabs of implant classes.

> ***Check carefully that you are working in the correct module, or you may find you have added a whole list of knee implants into a shoulder screen.***

For the non-arthroplasty modules, select the **General Purpose** tab to be able to enter hardware, darts, anchors, nails, drugs, and other equipment you use.

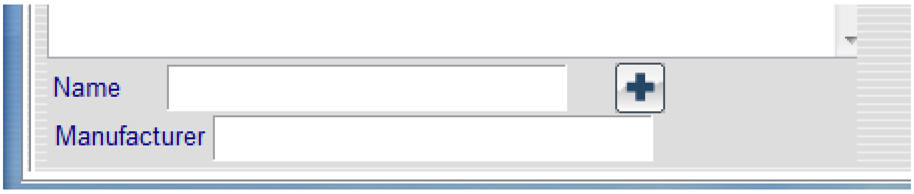


Adding a New Implant

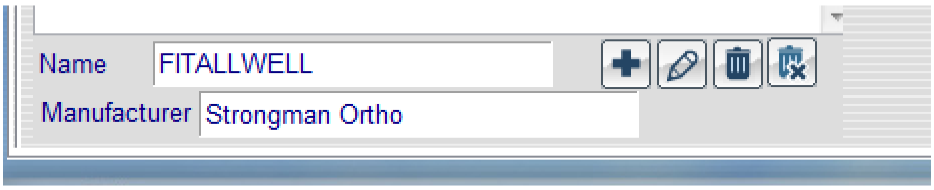
Check carefully that you are in the right tab for the module you want.

Adding a New Implant Name

Go to the bottom of the screen to the Name field. Click on the Add icon and type the name/brand of the new implant into the name section, then tab to the Manufacturer field and enter the name of the manufacturer.

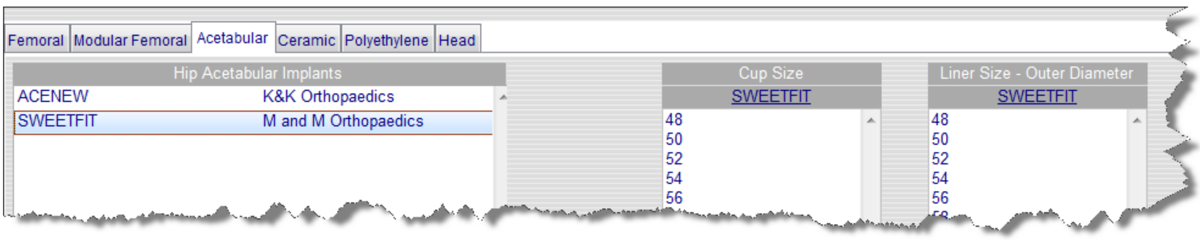


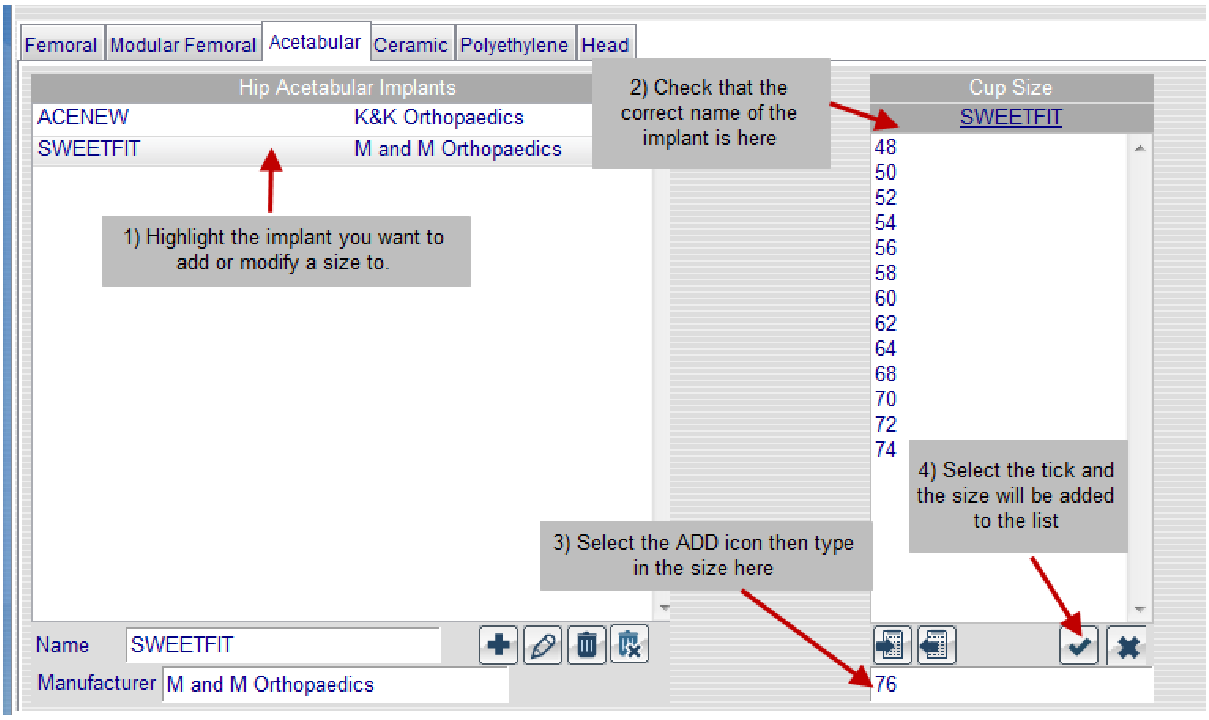
If you don't know the manufacturer, you can leave it blank. Note that the implant name should be the *brand name*, not the name of the manufacturer/supplier, since these companies make many different implants. Type in the details, and click on the **tick icon** to confirm.



Now that you have entered the name and manufacturer of the implant, you need to add the sizes that you will use for that implant. From the list on the left, highlight the implant you want to add the sizes to – you will then see the name displayed on the right, along with the relevant sizes that match the implant, if any have been entered. In the example below, the two options are Cup size and Liner size – Outer Diameter. Click the **tick icon** to save it. Repeat until all the sizes for that implant are added.

(Note that it is usually not necessary to add the outer diameter of an acetabular liner, as it normally matches the cup size, but in some cases where only a liner is cemented in, it may be a different size.)

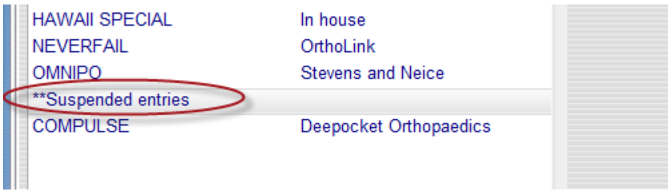




If you make a mistake, or want to make changes, highlight the implant name, select the **modify icon**, and change the name. Likewise, with the **rubbish bin icon**, you can delete the implant name (use the one with the **X** on it) to delete it permanently.

Note that you shouldn't delete an implant if there are records using it. Even if you don't want to use the implants any more they should still stay in the database. It's possible to suspend them so they appear at the bottom of the list but are still there for the search and statistics. Use the **rubbish bin** icon to do this, see Suspending a field

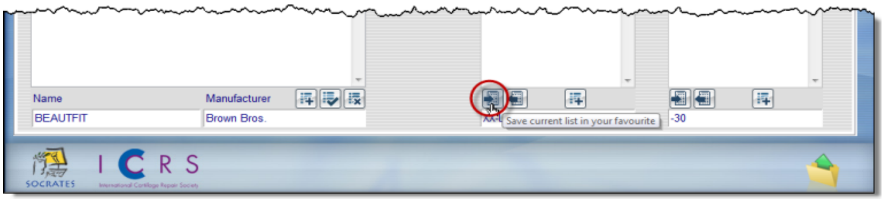
on page 11 for more details on this.



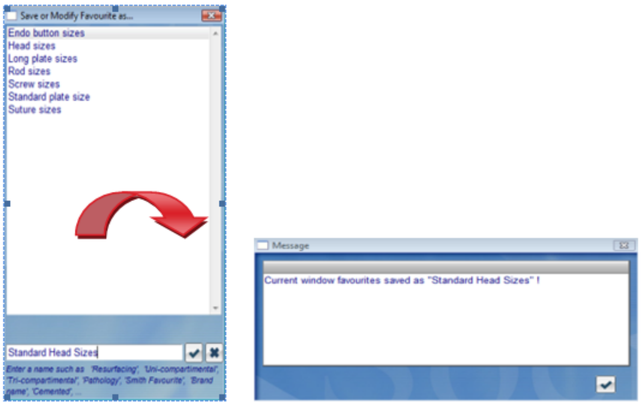
Adding Favourites (or Default) Lists of Implant Sizes

Some implants may have common sizes. Femoral heads, for example, are normally standard sizes despite being different brands. To avoid having to enter the same list of sizes for multiple implants, it is possible to save the list as a Favourite, or Default List, then select it again for other implants.

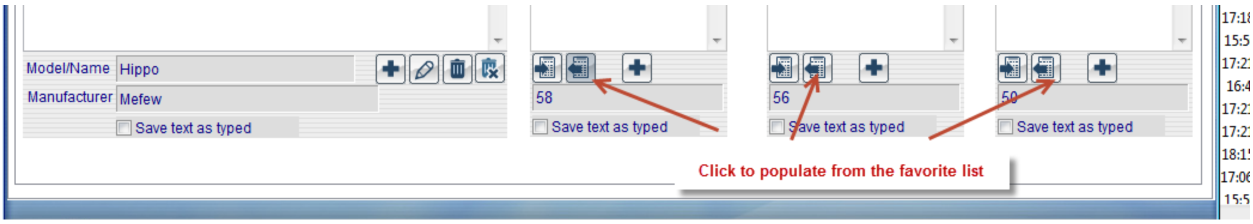
To do this, enter the sizes you want to have in your Default List. After you have created this list, click the icon on the left *"Save current list in your favourite"*.



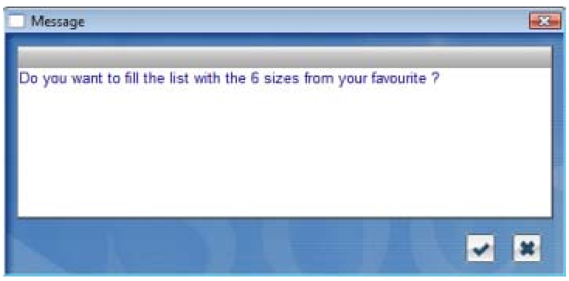
This brings up a window that asks you to name the list, something like Standard Head or Plate Size, Cemented THR Sizes, or Resorbable Screws, etc. After typing in the name, select the **Tick icon** to save this list as a Favourite.



Now, after you have named and saved the list, you can simply select it from your Favourites List to add this same list of sizes to a new implant (without having to add them one by one). Highlight the row on the left with the new implant name, and then click on the icon on the right *Load implants with your favourites."*



You will see a message like the one below. If you tick to proceed, the sizes will be loaded into the Size column for the new implant.



Adding Customisable lists, 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 – see next) to flag additional fields or groups 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 lists are first set up from the Set Up Screen.

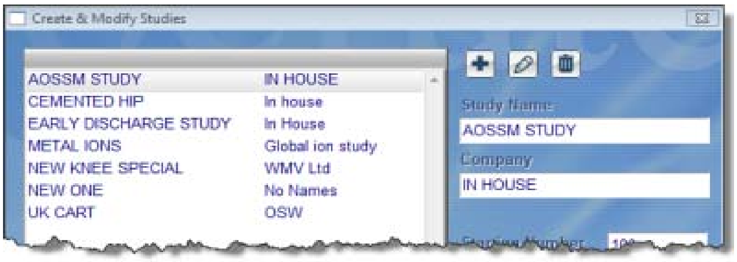
There are 3 places in Socrates where you can add custom/personalised additional fields, the module overall, Study specific custom fields and Surgery fields for capturing specific intraoperative surgical details.

There is separate chapter for how to add and work with these, see *"Customise and adding your own new fields"*

STUDIES

If a patient is having a surgery or treatment which is part of a study or a sub-set it's a good idea to allocate a study name, and then assign these records to that study. It makes it easy to search for the group and run stats, export data etc.

It is possible to set up as many studies as you want, and to allocate a surgery to a number of different studies. These are initially created by clicking on **Studies**, the next item down the list after the Adaptable field headings on the Set-Up Screen. They are not module specific.



The relevant study titles become visible when you click into the Study window on the Patient History Screen.

In this example, the patient has been allocated to three different studies.

Using "Study Type" as a subgroup variable is an easy way for you to search and retrieve data for this subset of patients.

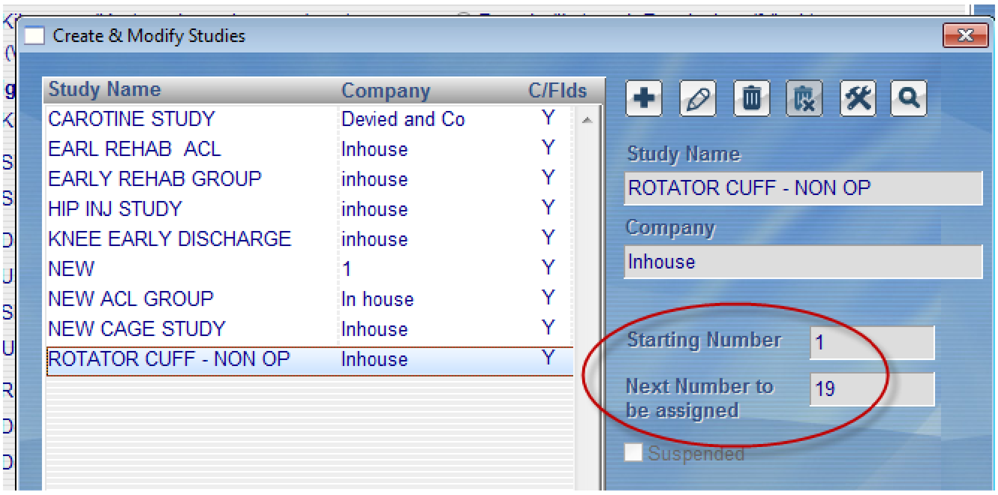
Setting Up Studies

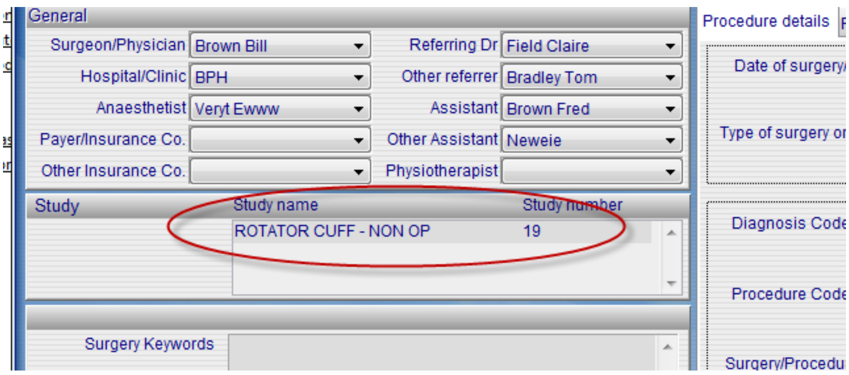
After selecting the Studies heading from the Set-Up Screen, click on the Add icon, and type in a name for your study. Then type in the company or group involved. If there is no outside entity involved, just type "In-house" or your name, or leave it blank.

Assigning an automatic study number

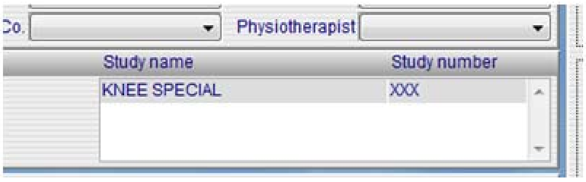
You can also indicate a Starting Number so the program knows where to start when allocating a unique number to each surgery that is part of the study. If you are the only site in the study, you would normally choose "1". If, however, you are part of a group study, and might be planning to combine your data, you can allocate each site a set of study numbers. Your own patients may start with the number "100," for example. The patients at Site 2 may start with "200", patients at Site 3 "300", etc.

Make sure you leave lots of room between numbers. If you are expecting to recruit 50 people into the study, leave *at least* 50 spaces before you start with the next group of numbers. This allows for drop-outs and extra, add-in patients. Once you have specified this window's parameters and saved the information, Socrates will automatically assign numbers consecutively to each surgery.



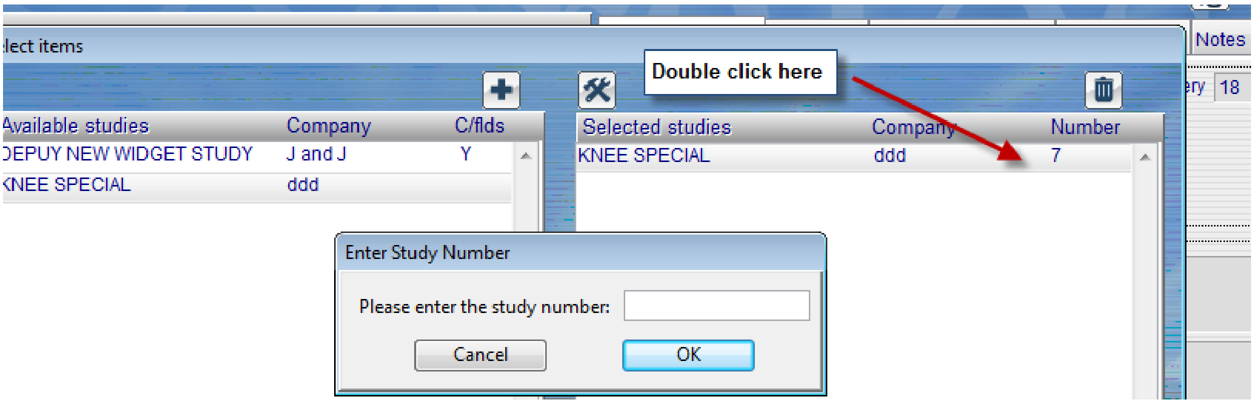


When you select a study from the study window it will assign the next consecutive number. Initially it shows up as xxx but when the screen is saved it will populate the number.



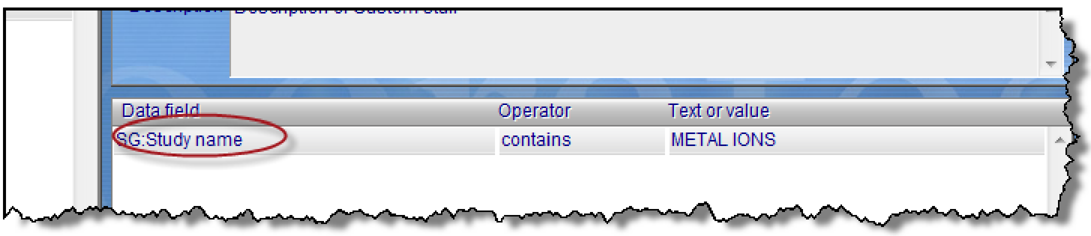
Manually assigning study numbers

It's possible to assign any number you want to an individual record. This is useful for retrospective records that you might decide to add to a study. Double click on the number field and the window below pops us. Enter or re-enter the number you want.

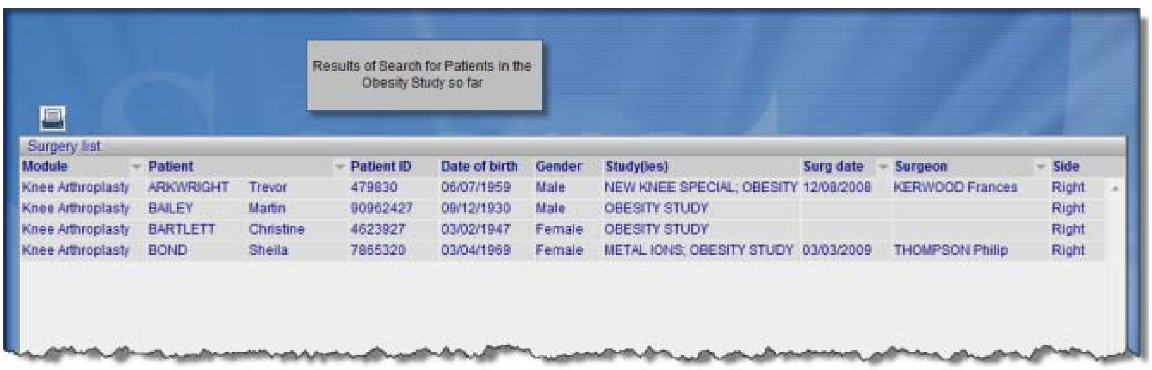


Searching for Study Groups

Once the study groups are set up, it's very easy to do searches and statistics on the surgeries in these groups. In this example, we've selected the study name, then added and saved a Search called "Metal Ions". Any subsequent searches using this saved search will then only select records within this study group.



The example below shows the result of a search asking for patients in an Obesity Study – the search displays four patients enrolled in the study so far. Note that two of these patients are also in other studies. For more information about using the search and statistics functions, check that chapter in the manual.



Adding protocols to study groups

Most studies would have scores and time points assigned when you want them completed. A surgery record can only be in one protocol so if they are in several studies, all the different scores and time points would need to be combined into the one follow up protocol and this should be named accordingly. If you have records where there are surgery records with studies assigned but no protocols, it is possible to assign the study groups to a protocol in one group, rather than having to manually add each record to a protocol. See the section on protocols for how to do this.

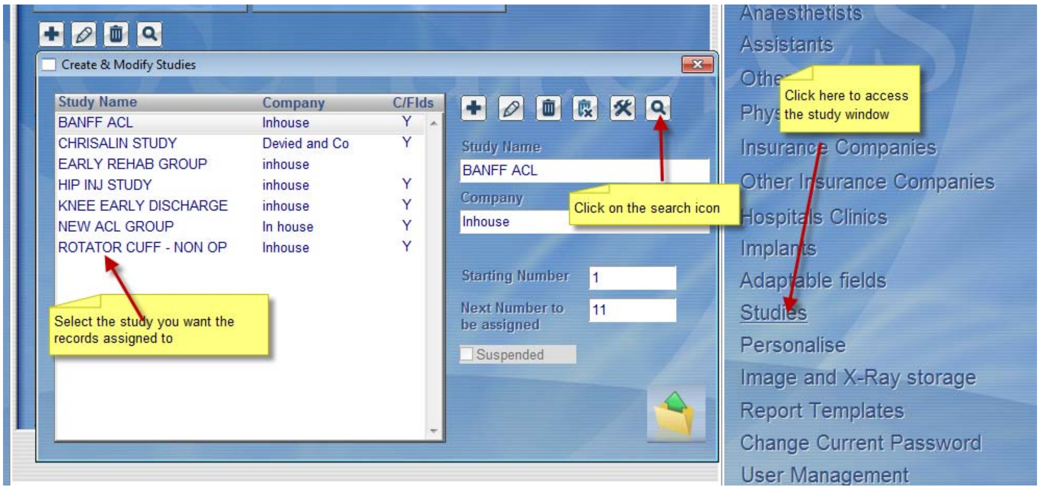
Adding custom fields to study groups

It's likely that if you are running a study there may be additional fields and questions that you want to add which are not in Socrates, and are only needed for the particular study. It's possible to allocate custom fields and evaluations to a study group which will only be visible when that record is assigned to that study, and are available to search and run statistics as part of that study. See the next section on 'Personalise' later in the chapter for details of how to do this.

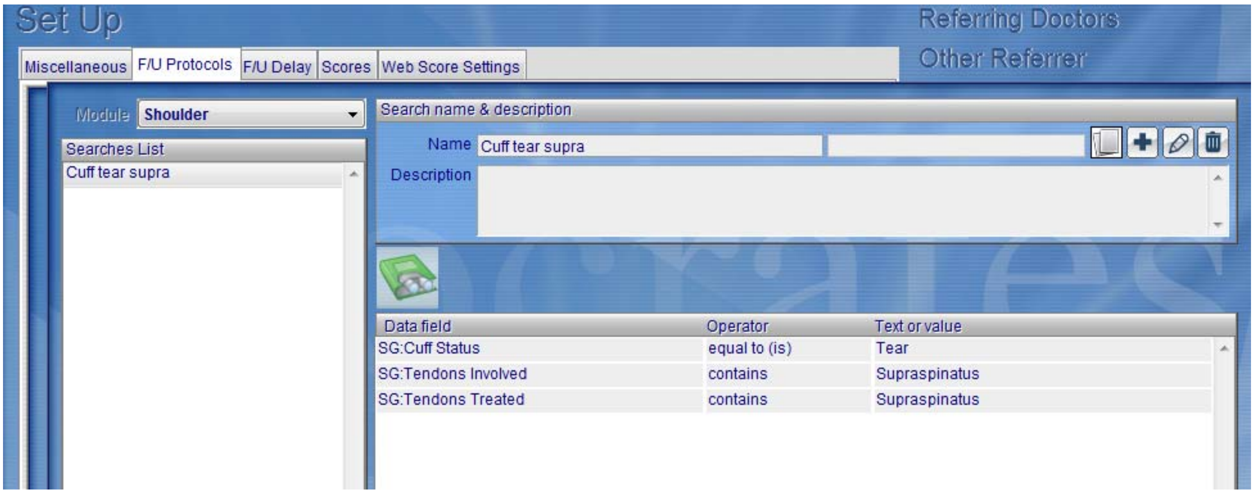
Assigning a group of surgery records to a study

Some sites will have existing records that they may now want to assign to a study. There may be a need to assign a group into a study retrospectively, an implant that may have had a problem for example, or a group of patients within a group, i.e. females over 50 with a certain brand of implant between a certain date range. It's possible to assign an individual surgery record to a study but if you have a group that can be identified using the search criteria you can allocate the group to a study rather than have to do each one individually.

To do this go to the Set Up screen, and select Studies. Then highlight the study to which you want to assign the records and click on the search function to select the group.



In this example we have selected records where there is a cuff tear, and the supraspinatus was involved and treated.



The list of records which fit the search criteria will be displayed, confirm that this is the list of surgeries/records that you would like to be assigned to that study and the study group you selected will be assigned to all those records. Note that ONLY those with no study will have this assigned, if they already have another study assigned you will have to do these manually.

IMAGE AND X-RAY STORAGE

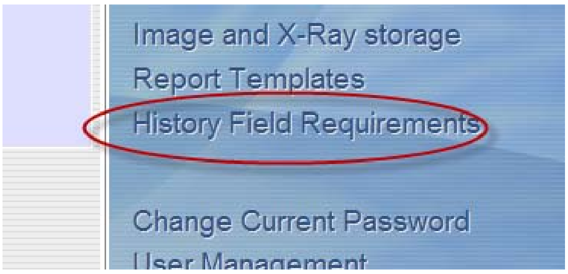
This next heading on the Set-Up Screen allows you to specify the location of the images, videos and other documents that are attached to your patient's files. When you set up your new database, it gives you the opportunity to select where you want the images stored, but you might want to move them at a later date. You'll find more information on how to relocate the Images Folder in the chapter on "X-rays and Images" later in the User Manual.

REPORT TEMPLATES

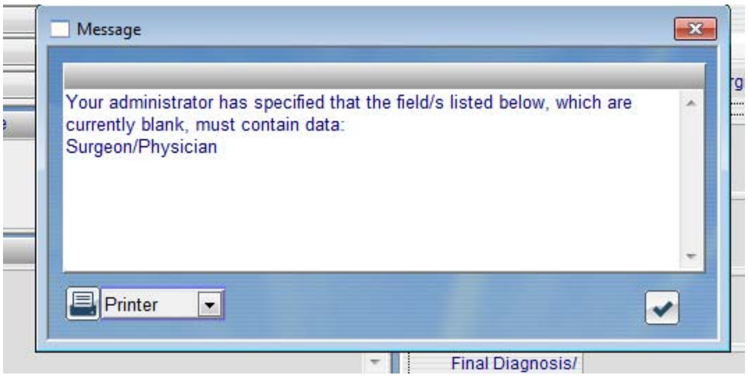
This feature provides you with access to the word processing package that will allow you to create efficient, thorough, op reports, follow-up letters, etc based on any data that has been entered into Socrates. Click on this option to set up the templates. You can find much more detail in the chapter on "Report Templates and Word Processing".

History Field Requirements

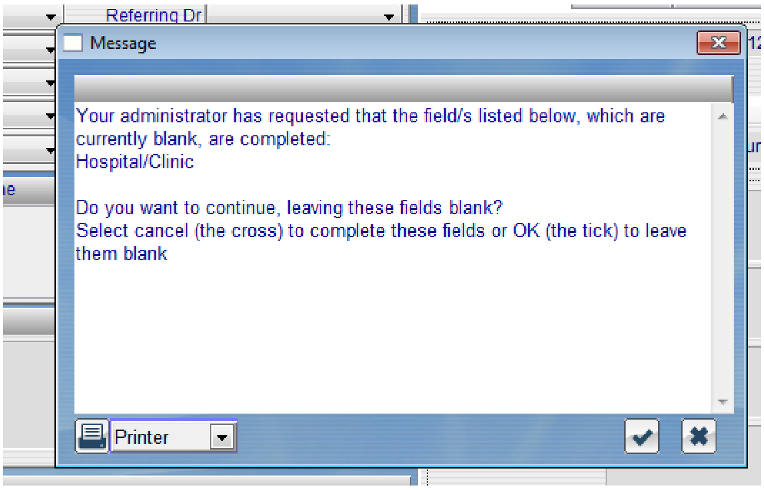
This gives the administrator the option of selecting all the fields on the history screen to be "nice to have" or "need to have" when data is being entered into that screen. It is useful in a large institution where you may want to ensure that details such as the operating surgeon, diagnosis, or procedure are entered.



This is the message if a field is missed and has been checked as mandatory. It won't let the user exit the screen until all the fields selected as mandatory have been entered.



This is the message if they have been selected to only give a warning message.



Well done, you're now at the end of the Set Up Screen features. You will be in this screen quite a bit to start with but once you are set up you shouldn't have to come back often other than to add new implants, or custom fields etc.

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