

## SOCRATES WEB SCORES – A summary

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This document contains a summary of main features that you need to know about the web scores. Make sure that you do a test run using yourself and a dummy patient before you start using it on real patients. If you haven't read the the full chapter of the manual "Web Scores" please do so.

Note to US users, the date format in this document is displayed as day/month/year rather than the way the US displays the dates. Your copy of Socrates will show up in the US format.

## Setting up your Database

This happens on the Set Up screen, the last tab. We will have sent you your ID and password. Make sure these are set up correctly on the **MAIN computer ONLY**, which is connected to the internet, and you have tested the connection. You also need to have selected the time intervals you want the web scores to be sent and collected. Go to the Set Up screen, *Web Scores Settings* - to access these settings. You can change the **Local Settings** at any time by selecting modify and making the change. If you have more than one computer using Socrates, the **local settings** should only be set up on the main machine. This is the computer that will automatically send and receive the web scores. It is possible to send and receive from the other workstations on demand, and to use the manual method.

**Note:** Don't ever change the Database settings in the top table or your service will no longer function. If you need to change your email address or sender name you must let us know so we can change the settings on the web server first.

Miscellaneous | F/U Protocols | F/U Delay | Follow-ups & Scores | **Web Score Settings**

The screenshot shows the 'Web Score Settings' tab in a software interface. It contains three main sections: 'Database Settings', 'Database Defaults', and 'Local Settings'. Red arrows point from callout boxes to specific fields: 'User Number' and 'Password' in Database Settings; 'Local Email' in Database Settings; 'Prompt to choose email...' in Database Defaults; and 'Interval' in Local Settings.

**Database Settings**

- Web Server: Webscores.socratesortho.com
- User Number: 5
- Password: [Redacted]
- Local Email: drbloggs@bloggo.com
- ☒ Enable Web Scores for this Database

**Database Defaults**

- ☒ Prompt to choose email as method of notification if a patient email address is entered.
- ☒ Enable webscores for new surgeries by default.

**Local Settings**

- ☒ Automatically check for new scores and process queue
- Interval: 10 Minutes
- ☒ Check for scores when logging into database

**Callout Boxes:**

- We give you this number and a password. DONT CHANGE THEM** (points to User Number and Password)
- Your (the sender) email address** (points to Local Email)
- Select the defaults you want.** (points to Database Defaults)
- Set these on the main machine ONLY** (points to Interval)

Buttons on the right: Unlock Processing, Rebuild Server Schedule, Protocols.

## Sending Scores

There are 2 methods of assigning the web scores that are due to be sent out. The first is “set and forget” using assigned follow up protocols which have follow up periods and scores assigned to each time point. These are set up for each patient group by the user. Once they are set up, the scores will automatically be sent out to the patient/s at the prescribed time points once the protocol is assigned to a record.

The other is a manual system where you can elect to send any score/s, to either an individual or group of patients at the current time point. Over time you will most likely use both.

Once the score has been completed by the patient online they take about 5 seconds to come back into Socrates if you use *send/receive*, or they will be there the next time the program collects the scores automatically. This depends on how often you have set it up to send and check for scores.

## Completing the scores by patients

There are two ways the patients can complete their online scores.

- One is via a link which is sent to the patient’s own email.
- The other is where the patient can log into the web server address in the clinic using a tablet or PC. Each patient needs to have their method of notification set on their demographics screen, notification tab. If the email address is highlighted in yellow, this means that the patient will receive their scores by email.

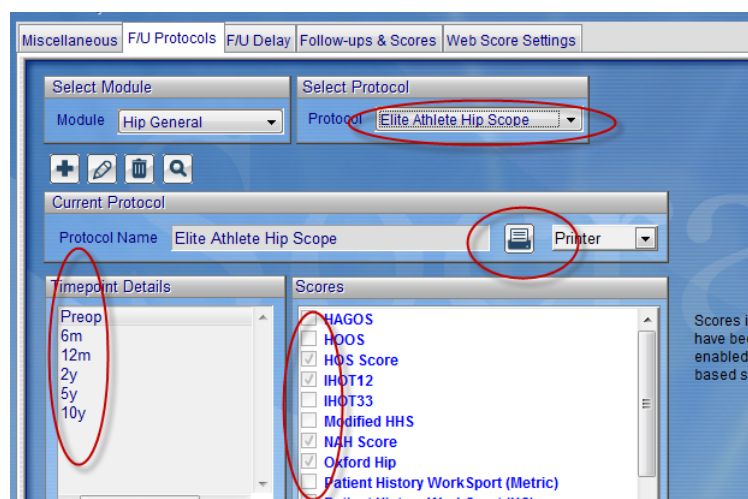
The screenshot shows a web form for patient notification settings. The 'Notification' tab is active and circled in red. Within this tab, the 'Don't send via email' radio button is selected and circled in red. Other radio buttons include 'Patient email' and 'Other email'. Below the notification options, there are input fields for 'Email' (containing 'socratesdemo@gmail.com' and highlighted in yellow), 'Post Code' (55106), 'Phone #', 'Cell Phone', and 'Other Email'.

You can still log into the web server link from the clinic even if ‘email address’ is selected. If the score is completed before the email has been sent to the patient, it won’t be sent. If the email has already been delivered and the patient has completed it in the clinic, and it’s been received back into Socrates, the email link will give them a “there are no more scores to be completed” message when the patient clicks on the link on their email.

## Using the Protocol Method

If you want this to be an automated process you need to set up and assign a protocol to each record. Without this Socrates doesn’t know what scores are due to send out, or when they should be completed. A protocol is really a follow up regime, what scores you want, at what time points, for

what patient groups. You can have as many protocols as you want for each module, but only one for each surgery record. Check each time point and selected score carefully before you save the protocol; it's a good idea to preview or print out each protocol once you have set it up to make sure they are correct. If you modify a time point or a score in a protocol be aware that **every** surgery allocated this protocol will have all their protocols with the new follow up periods and scores changed. If you haven't yet set up any protocols, go to the Protocol chapter in the manual for how to do this. You can also assign a protocol to a group of patients all at once to save you having to add them one surgery at a time.



### Web enabling a record

Each record/surgery needs to be web enabled, and the protocol selected before any scores can be sent to the web server. This can either be done at the time of setting up the surgery record, or later on the history screen, using the modify icon and clicking on the check box. Before a patient can receive a web score they must have a record in Socrates, and the person entering it needs to know what protocol to assign to that record if you want it to go out automatically.



### Using the Manual Method

You can also send a score or a group of scores to individual record, or a group of surgeries at any time outside the protocol also. See later in this document for more details.

### Ways for patients to complete their scores

#### Via email

If the patient has an email address, and it is entered in Socrates and selected as the method of notification, they will receive an email with a link to click on which displays the scores that are due. If the email address is not in yellow they will not receive emails. To check this go to the notification

tab, the email may have bounced or they may have unsubscribed in which has case it will automatically be changed to “Don’t Send by email” If you have an older database the email may not have been set to default when it was initially added and needs to be done manually on this tab.

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

Address Patient keywords Notification Alternative Contact Notes

Address

City St Paul

State MN Post Code 55106

Country

Phone # Cell Phone

Email socratesdemo@gmail.com

Other Email

Pr 22 The fields marked with \* are the recommended minimum fields.

Pr 11 Address Patient keywords Notification Alternative Contact Notes

Pr 04 ☐ Patient deceased Date of death

Pr 12 ☒ Patient email

Pr 22 ☐ Other email

Pr 27 ☐ Patient has unsubscribed from emails

Pr ☐ Patient email bounced

Check here if the email isn't in yellow

### Email message

There is a default generic message which goes out to all patients. After version 10073 it is possible for sites to have their own email message, add your own logos etc. Please contact us for details about how to set this up.

### Logging in from the clinic

If the patient doesn't have an email, or you would prefer that the patients complete their scores in the clinic, this is possible. There are two ways they can do it.

### Using the QR BAR code (available after Version 3.5.5 10074 only)

This is the fastest way to access the scores. Each record has a QR BAR code which has the ID and password of the patient record where the patient's scores are stored ready for completion. These QR BAR codes are unique and will take you directly to the patient's link on the server in the same way as entering the ID and password. It's just a faster and easier way of accessing the link for that surgery. To use the feature you will need to download any of the free bar code scanners Apps which can read these codes on the iPad or tablets that you use in the clinic. An example is [redlaser.com](http://redlaser.com). You may then have to go the camera on your smart device and accept that software, then you are ready to go.

Once the App is downloaded go to the APP on your smart device (book mark it on the device so it's always there) click on scan and it will take a picture of the QR BAR code, then take you to the link. The device can either read the QR BAR code direct from the image on the Socrates screen, or from the print out that has the ID and password, and the QR BAR code on it.

On the left hand side of the screen you can click in the QR BAR code icon and the QR BAR code will be displayed, just open your bar scan App, point it towards the black QR BAR square and it will scan. It may ask you to click OK to take you to the link. The patient will then see the scores they are due to complete. Note that this icon, the print icon, and the ID and password will **only be visible on the screen as below once the score has been sent to the web server**. Do this by either using Send/Receive Scores, or Local Score Entry, unless it has already been sent using the automatic

schedule. If you have just clicked send and receive you also have to refresh (leave and return) the screen to be able to see these.

You can also access the QR BAR code by printing out the web server details which includes the code, or you can preview it and then scan the preview on the screen or form. Open your bar scan App on your iPad or tablet, point it towards the black QR BAR square on the form or the preview screen and click scan.

### Using the ID and password

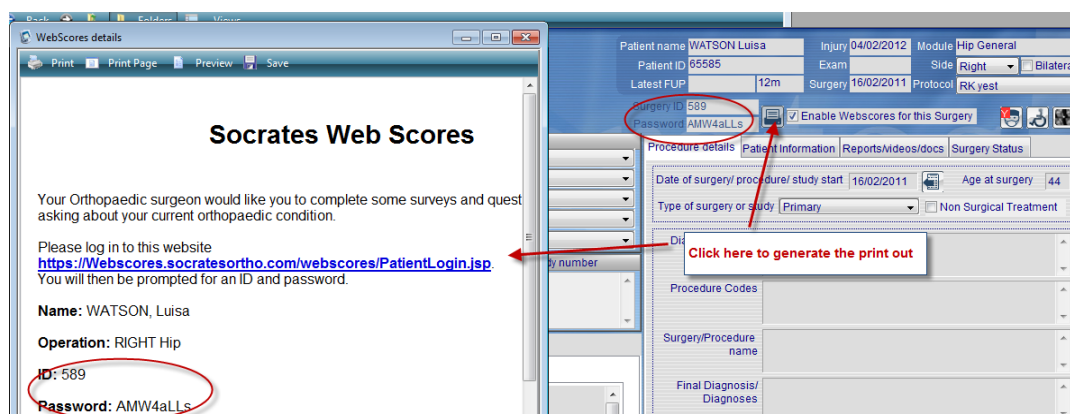
The address of the web server for the patients to log into in the clinic is

<https://webscores.socratesortho.com/webscores/PatientLogin.jsp>

**Bookmark this link** in the iPad or computer the patients will use to access their scores. To access the scores due for completion the patient will need their ID and password. This can be generated either



by clicking on the print icon on the history screen of the record from the Surgery menu or just writing it down for the patient from the screen where it is displayed. **The password is case sensitive.** The print icon, and the ID and password will **only be visible on the screen as below once the score has been sent to the web server**, either using Send/Receive Scores, or Local Score Entry unless it has already been sent using the automatic schedule. If you use *Send/Receive Scores* or *Local Score Entry*, you will have to exit and return to the screen to see the password and ID on the screen.



Once the patient is logged into the web server they will see the log in window.

### Socrates Webscore Patient Login

ID Number:

Password:

Once the ID and password is entered, the scores due will be visible and ready to complete. This is exactly the same as what the patient would see on the email once they clicked on the "Click here" link.

#### AITKEN, Freddie

Please click on the questionnaires in the list below. They relate to your RIGHT Hip.

There are 2 surveys for you to complete. Please answer all the surveys listed below until you see a message saying there are no more to left complete.

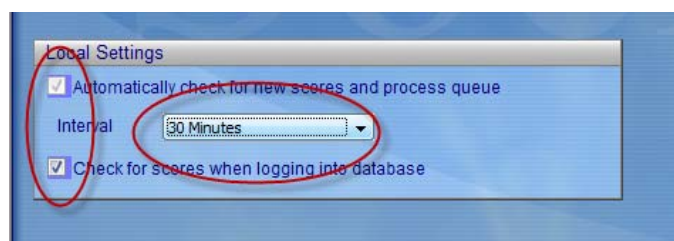
Questionnaire Name	Please complete by
Right Hip Arthritic Hip Score	Sun, Jul 15, 2012
Right Hip Outcome Tool (IHOT12)	Sun, Jul 15, 2012

You can also get a list of all records with the ID's and passwords from the Web ID report on the Reports screen.

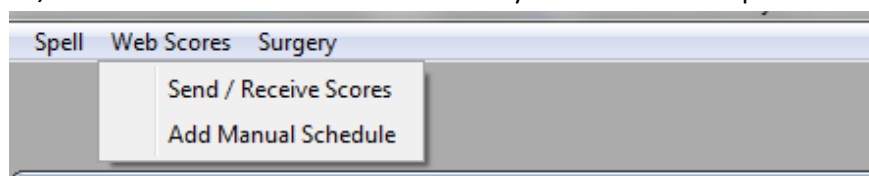
### Sending and receiving scores

You can send and collect scores in several ways, or use a combination.

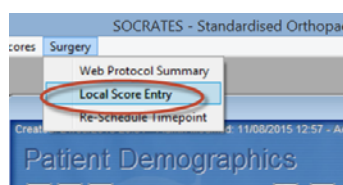
- Set the computer up to send and receive scores automatically at selected intervals, and on log in.



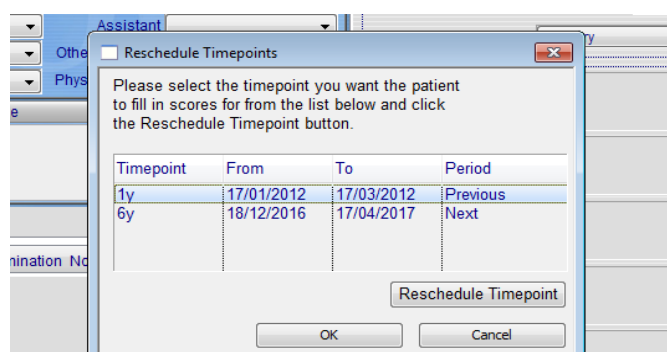
- Send and receive on demand by going to the menu bar at the top of the screen once you are logged into Socrates - *Web Scores* which will give you the options to send and receive on demand. *Send/Receive Scores* will **send and collect** any due scores for all patients.



- Send a score for a single record only. If you are logged into that record, click on *Local Score Entry* of the surgery tab, and anything due in the protocol for **just that record** will be sent.



**Reschedule Timepoint.** You can also re-send a score that wasn't completed in the required time frame, it may have expired as it is out of its time window, or the next one isn't yet due if they come in early. Go to the top menu bar **Surgery** - *Reschedule Timepoint* and select which time point you want to re-send. This is normally used when a patient is either a bit early or late for their follow up. If you do this, be aware that the follow up will be stored in Socrates with the original follow up delay selected in the protocol. So if they came at 7 months and you re-sent their 6 month score, it would show up as a delay of 6 months on the score screen. You would need to go into that score screen, modify and change the delay to 7 months if you didn't want it to be recorded as the 6 month score. An example of a missed score, and the next one due:



If the score that is either overdue, or is due in the future, is not close to the current date/follow up, you should send a manual score. This will calculate the exact follow up time point based on the current date and the date of surgery rather than using the original ones from the protocol. If there is nothing visible in this window, it means there are no scores due in the future, or overdue.

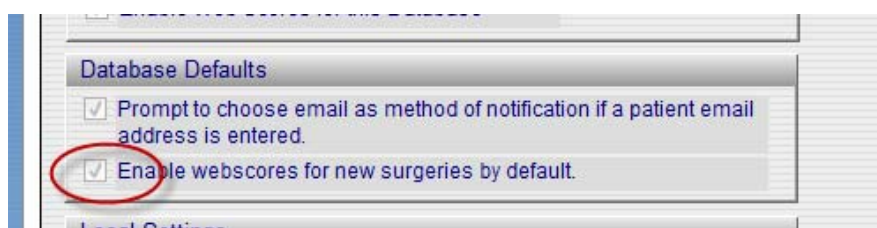


**Timepoints** – scores have set days before and after the due date when they are available to be completed. This varies with the delay selected. The table below shows when each is sent out, how long they are available for completion and when a second email will be sent out if they haven't been completed.

How Due Dates are Calculated	
<b>Preop</b>	
- 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.	
<b>Postop</b>	
- 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.	
<b>Manual Schedule</b>	
- Sent immediately, valid for 14 days. Reminder sent 7 days after initial email.	

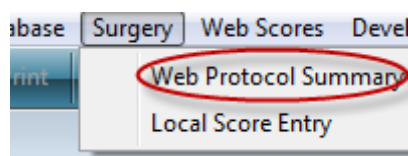
### Default Settings

You can set this up to be automatically assigned each time you add a new record on the Web Settings, on the Set Up screen. You can also elect to have the email address assigned as the notification method if it has been entered to the patient record.



### Web protocol summary

This is an important screen, as it shows you for each record what the patient is due for, and when it will be sent out. Each surgery screen can display the scores that are queued to be sent, those that have been sent, and those due in the future. To access this go to the history screen for the relevant surgery, then select the "Surgery" drop-down menu at the top of the screen and select Web Protocol summary.



This will list the scores selected and the time points due. This surgery was in a protocol UNI TKR with scores due at pre-op, 6 month and 2, 5, 10 and 15 year time points.

**Pending Communication with Web Server**

Timepoint Due From Due To Score Ready To Send Score Completed Sent At Date Received

Timepoint	Due From	Due To	Score	Ready To Send	Score Completed	Sent At	Date Received
Preop	6 MAY 2013 10:24:39	20 MAY 2013 10:24:39	Kujala	YES	NO		
Preop	6 MAY 2013 10:24:39	20 MAY 2013 10:24:39	Patient Satisfaction+Pain (Preop)	YES	NO		
Preop	6 MAY 2013 10:24:39	20 MAY 2013 10:24:39	UCLA Activity	YES	NO		
Preop	6 MAY 2013 10:24:39	20 MAY 2013 10:24:39	VAS Pain	YES	NO		
6m			Global Rating of Change Scale	NO	NO		
6m			Kujala	NO	NO		
6m			Patient Satisfaction+Pain (Postop)	NO	NO		
6m			UCLA Activity	NO	NO		
2y			Global Rating of Change Scale	NO	NO		
2y			Kujala	NO	NO		
2y			Patient Satisfaction+Pain (Postop)	NO	NO		
2y			UCLA Activity	NO	NO		
5y			Global Rating of Change Scale	NO	NO		

**How Due Dates are Calculated**

**Preop**

- Date of surgery is today, preop timepoint is 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.

**Annotations:**

- Date due to send from the web server, to the patient at the valid time points.
- Date the score will expire and no longer be available
- Ready to send to, and the date the sent to the web server
- Date the score was received
- Scores selected and time points from protocol.
- No surgery date yet, so no no post op dates can be assigned.

Close Summary

This web score summary above has no dates set for the post op ones due as there is no surgery date entered. Once the surgery date is entered the due from and to dates are populated for all the time points and these will wait on the web server, and be sent out on those dates. Note that the manual scores do not show up on this list.

**Pending Communication with Web Server**

Timepoint Due From Due To Score Ready To Send Score Completed Sent At Date Received

Timepoint	Due From	Due To	Score	Ready To Send	Score Completed	Sent At	Date Received
Preop	6 MAY 2013 10:39:41	7 MAY 2013 10:39:41	Kujala	NO	YES	6 MAY 2013 10:33:37	
Preop	6 MAY 2013 10:39:41	7 MAY 2013 10:39:41	Patient Satisfaction+Pain (Preop)	NO	YES	6 MAY 2013 10:33:37	
Preop	6 MAY 2013 10:39:41	7 MAY 2013 10:39:41	UCLA Activity	NO	YES	6 MAY 2013 10:33:37	
Preop	6 MAY 2013 10:39:41	7 MAY 2013 10:39:41	VAS Pain	NO	YES	6 MAY 2013 10:33:37	
6m	22 OCT 2013 00:00:00	19 NOV 2013 00:00:00	Global Rating of Change Scale	YES	NO		
6m	22 OCT 2013 00:00:00	19 NOV 2013 00:00:00	Kujala	YES	NO		
6m	22 OCT 2013 00:00:00	19 NOV 2013 00:00:00	Patient Satisfaction+Pain (Postop)	YES	NO		
6m	22 OCT 2013 00:00:00	19 NOV 2013 00:00:00	UCLA Activity	YES	NO		
2y	8 MAR 2015 00:00:00	6 JUL 2015 00:00:00	Global Rating of Change Scale	YES	NO		
2y	8 MAR 2015 00:00:00	6 JUL 2015 00:00:00	Kujala	YES	NO		
2y	8 MAR 2015 00:00:00	6 JUL 2015 00:00:00	Patient Satisfaction+Pain (Postop)	YES	NO		
2y	8 MAR 2015 00:00:00	6 JUL 2015 00:00:00	UCLA Activity	YES	NO		
5y	6 APR 2018 00:00:00	5 JUL 2018 00:00:00	Global Rating of Change Scale	YES	NO		

**Annotations:**

- Dates now set going forward once surgery date was

## 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.

Check the Reports chapter of the Manual for more details about these reports.

**Report of Next Scores Due**

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
Next Scores Due From	To			
Mod	Patient	Protocol	Patient ID	Surgery date
			Side	Last F/U
			Last F/U Date	Next F/U
			F/U Begins	F/U Ends

## Web ID's

This report will generate a list of all web IDs and password by protocol. You can select ALL or selected protocols or 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	Generate report		
Protocol	All protocols							
Patient Last Name	Patient First Name	Patient ID	Module	Protocol	Surgeon	Surgery Date Start Date	Web ID	Web Password
ALLCOCK	Christopher		Hip General	Test	unknown		385004	oMt4sCBC
			Hip General	Test	unknown	04/12/2012	385001	oMt4sCBC
			Hip General	Test	unknown	04/12/2012	385000	oMt4sCBC
			Knee General		unknown	04/12/2012		
			Shoulder		unknown			
BOUNCE	Fred		Hip General	Test	unknown		391780	GFcfe3ma

### 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.

Web scores sent

Select the date range you are looking for.

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	
Date sent from	04/04/2013	to	11/04/2013	Generate report		
Patient	Module	Surgery Date	Protocol	Date/Time Sent		
DALZELL, Kris	Spine		Kris	9 Apr 2013 18:49:22	<input checked="" type="checkbox"/> Show Protocol Schedules	
DUNDE, Fed	Foot & Ankle		bug test	9 Apr 2013 17:40:01	<input checked="" type="checkbox"/> Show Manual Schedules	
FREEDMAN, Brett	Foot & Ankle	05/04/2011	TEST	10 Apr 2013 11:15:25		
FREEDMAN, Brett	Foot & Ankle		TEST	10 Apr 2013 11:25:32		
DALZELL, Kris	Hip Arthroplasty	09/04/2011	Brads protocol	9 Apr 2013 23:24:40		
DALZELL, Kris	Hip General	07/01/2013	test	9 Apr 2013 18:49:20		
DALZELL, Kris	Shoulder		NZ test	10 Apr 2013 11:15:27		
DOTSON, Chris	Spine		Manual Schedule	9 Apr 2013 18:49:23		
DOTSON, Chris	Spine		Manual Schedule	9 Apr 2013 18:49:25		
DALZELL, Kris	Spine		Manual Schedule	9 Apr 2013 18:51:53		
KHORSHID, Omar	Hip Arthroplasty	04/05/2012	Manual Schedule	11 Apr 2013 14:46:50		
DUNDE, Fed	Knee Arthroplasty		Manual Schedule	9 Apr 2013 12:46:03		
KILDEY, Robyn	Knee General		Manual Schedule	11 Apr 2013 14:48:25		
SVAK, Andrea	Shoulder		Manual Schedule	11 Apr 2013 06:50:24		
EVANS, Matt	Shoulder		Manual Schedule	11 Apr 2013 06:50:26		

### Web score Tracking

This tracks the time from sending the email to the patient, to when they completed the score, the method chosen (email or in clinic) and those that have not been completed.

### Bounced Unsubscribe

Make sure that you check this report from time to time. If patients are listed on this report they will no longer be receiving emails unless you go to their record and change the notification method.

Unsubscribes/Bounces report

Next Scores Due		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	02/09/2015	to	09/09/2015	Generate report		
Patient	email	Type	Log Date/Time			
GER						