

SOCRATES WEB SCORES FAQ'S

Contents

1. The patient hasn't received their email	1
2. No ID, password or QR code.....	2
3. The email address was yellow but isn't any more.	2
4. How do I check that the score is current?	3
5. What can I do if the patient hasn't completed their surveys in the scheduled time.	3
6. What is the QR code for	4
7. The patient has deleted the email with the link	4
8. Do the web scores get sent out and collected automatically	5
9. Can I send and collect scores any time or do I have to wait for it to do it automatically	5
10. How do I find emails that have bounced or unsubscribed	6
11. Can a time point or a score/s be changed/added/deleted in the protocol.....	6
12. If the surgery has failed, or the patient has died, will the scores still be sent out?.....	7
13. The surgery has failed, it is no longer web enabled nor Ongoing, but the email address is still yellow.	8
14. How do we get to the patient link in the office	8
15. Can we send out additional or different scores/surveys to what is in the protocol?.....	10
16. What's the difference between manual and reschedule	10
17. Can time points and scores be changed in a protocol.....	10
18. How do we know that an email has been sent.....	11

1. The patient hasn't received their email

For the email to be delivered several things need to happen.

- The email address needs to have been selected as the method of notification – it will be in Yellow. If it's not, no emails will get sent. Check FAQ 3 for reasons why it is no longer set.

- Web scores have to be enabled on the surgery records.

- For the score to go out automatically there has to be a protocol selected for each surgery.
- The scores due needs to be in the current time period. Check the web protocol summary to see if it is current. See FAQ 4
- Check that there is a Surgery ID and password and QR code – if not, it means that record hasn't been sent to the web server – see FAQ 2

2. No ID, password or QR code

This is usually because the details haven't been sent to the server. One computer with Socrates installed should be set up to send and receive the scores automatically. If this isn't set scores can only be sent and collected if a manual/AdHoc Send and Receive is done.

- *Check that the following settings are activated on one PC, usually the computer that uses Socrates most often.* If there is no copy of Socrates open, the scores can't get sent out, or be collected. This is important to know this in case the user on the PC with the automatic settings went away for an extended period. If no-one logged into that copy during that period of Socrates, no scores would be sent out or received during that time unless they did a manual send and receive on their own PC. Note that you can now have this set on more than one PC, if it tries to send at the same time as another it will lock the process and prevent the other machine doing the same. (The message below about one PC will be removed in future versions.)

- The other reason could be that the surgery was web enabled after the last time point in the protocol had expired. This can happen with databases that have older surgeries that were set up before the database was web enabled. An example, the surgery date was 1.1.12. The preop score was entered via a paper form. The surgery is in a protocol which has a 2 and 3 year follow up with scores but the database only started using the web scores in 2016. In that case that record won't have an ID and password as there was nothing to send to the server, the last score would have been due in January 2015. There could also be older surgeries that are in a protocol with time points still valid but they may not be checked as web enabled.
- Check to see if the email address is valid also. See FAQ 9.

3. The email address was yellow but isn't any more

The email address may have bounced, or the patient has unsubscribed. Check the notification tab on the patient demographic screen. If you update the email address or the patient has agreed to receive the emails again, you

can click on modify and change the notification method back to 'patient email.' See FAQ 10 for how to find other email addresses that have bounced or unsubscribed.

The fields marked with * are the recommended minimum fields.

Address Patient keywords **Notification** Alternative Contact Notes EMR

☐ Patient deceased Date of death

☐ Don't send via email

☒ Patient email

☐ Other email

☐ Patient has unsubscribed from emails

☐ Patient email bounced

Primary Hip General Right

06/07/2013 Spine

Primary, Revision own, Anterior

22/09/2013 Hip General Right

Primary, Osteotomy, Surgical V

13/11/2013 Hip Arthroplasty I

Primary, Total Hip Arthroplasty

23/11/2013 Hip Arthroplasty F

Primary

03/02/2015 Hip General Right

4. How do I check that the score is current?

The web protocol summary is found on the top menu bar and displays the date range in which the scores are due. In the next example the next scores are the 3-year ones. They are due from 9th September to the 8th December. If only preop dates are showing, it means that the surgery or procedure date hasn't yet been entered so it can't calculate when the follow up scores are due to be sent out. Once a surgery date is entered, the post op/procedure date range will show up.

Special Spell Web Scores **Surgery**

- Web Protocol Summary
- Manual Scores Summary
- Local Score Entry
- Re-Schedule Timepoint

Webscore Protocol Summary

Patient name: ARDEN Fred Injury: Module: Knee Arthroplasty

Patient ID: 34r Exam: Side: Right Bilateral

Latest FUP: 27m Surgery: 09/10/2015 Protocol: Elitest

Next FUP(s): 08/12/2018

Show score summary

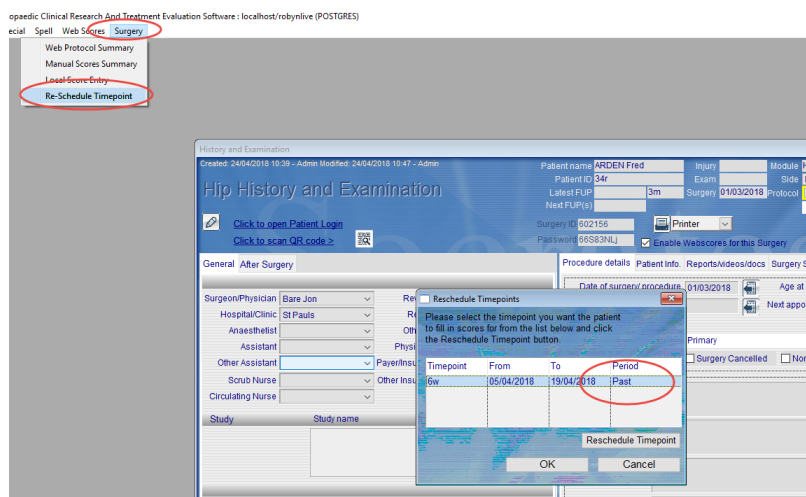
Timepoint	Due From	Due To	Score	Ready To S...	Score Comple...	Date Sent To Server	Date Received
Preop			EQ-5D - 3L	NO	YES		
1y	24 SEP 2016 00:00	17 NOV 2016 23:59:59	EQ-5D - 3L	NO	YES		
2y	9 SEP 2017 00:00:00	8 DEC 2017 23:59:59	EQ-5D - 3L	NO	NO		
3y	9 SEP 2018 00:00:00	8 DEC 2018 23:59:59	EQ-5D - 3L	NO	NO	1 FEB 2018 17:27:19	

How Due Dates are Calculated

5. What can I do if the patient hasn't completed their surveys in the scheduled time?

If the dates have expired and they haven't been completed, they can be rescheduled and sent again. Go to top menu bar, *Surgery - Re-schedule Timepoint*. To reschedule a past or future due date, highlight the time period and click reschedule. Note that they will be entered at the follow up they were originally due, not when you rescheduled it. For example, if you rescheduled a past score 3 months after the surgery, that should have been completed at 6 weeks it will show as 6 weeks on the score screen when the score came into Socrates. If it is showing as current there is no need to reschedule.

If you send out a Manual/AdHoc score at the same time point as well as reschedule the patient will get 2 sets to complete. See Manual/AdHoc scores FAQ 15.



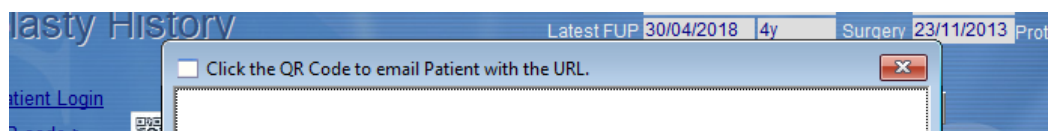
6. What is the QR code for?

This is a quick way of accessing the patient link to fill in their scores when they are in the clinic. This code contains the ID and password, and bypasses the need for manually having to enter the ID and password on the link to the web server. Just take a picture of the code with your iPad/tablet using a free QR bar code reader.



7. The patient has deleted the email with the link

If it was the first email that was deleted, you can wait until the reminder is sent. This will be halfway between when the scores were sent and due. If you don't want to wait, or they have already had their reminder, you can click on the QR code and it will open a new email addressed to the patient. You will need to have your email open.



Send	From: G Suite
	To: robyn@socratesortho.com
	Cc:
	Subject: CHANGE SUBJECT

<https://webscores.socratesortho.com/webscores/questionnaires/5caa9616-ab28-4492-9e85-06d32566aa2a>

Just add your own subject matter and message. Remember that the link will only have scores to be completed if they are current. You can click on the link yourself to check what's due. If there are now scores due you may need to reschedule (FAQ 5).

8. Do the web scores get sent out and collected automatically?

For scores to be sent and collected automatically, the settings below need to be activated on one PC (usually the computer that uses Socrates most often). This is found on the Settings Screen (tools icon). If this computer is not on, and no one is logged in to Socrates, the scores can't get sent out or be received.

The screenshot shows the 'Set Up' window with the 'Web Scores' tab selected. The 'Local Settings' section, which is circled in red, contains the following options:

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

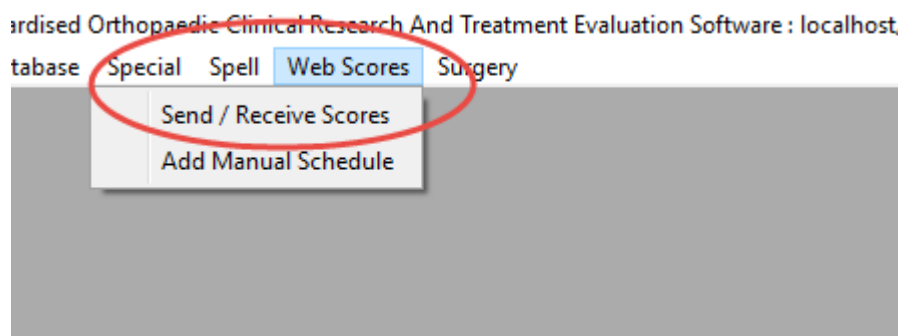
Other settings visible include:

- Database Settings:** Web Server (webscores.socratesortho.com), User Number (3600), Password (masked), Local Email (robyn@socratesortho.com). Checkboxes for 'Enable Web Scores for this Database', 'Custom Emails enabled', and 'Email Verification enabled' are all checked.
- Database Defaults:** Checkboxes for 'Prompt to choose email as method of notification if a patient email address is entered' and 'Enable webscores for new surgeries by default' are both checked.
- Buttons:** Test Connection, Unlock Processing, Verify Email For All Patients, Check Schedule Validity, Refresh Send State.

9. Can I send and collect scores any time or do I have to wait for it to do it automatically?

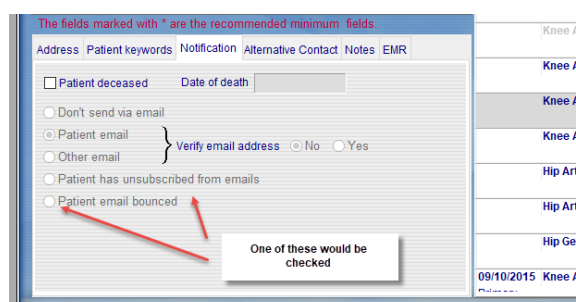
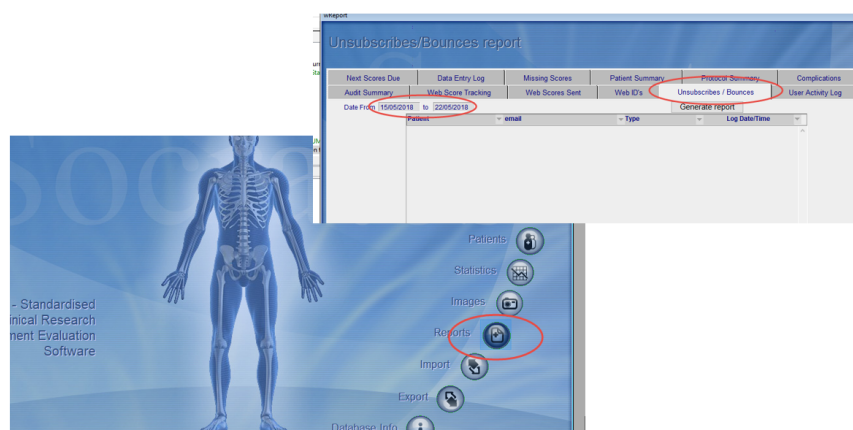
Scores can be sent and collected from the web server any time by clicking on Send and Receive.

You might use this if you have a patient who has just filled out their scores in the clinic and want to see what they are, instead of waiting for the automatic process to kick in (FAQ 8). The scores will be sent back straight away, along with any others that are queued.



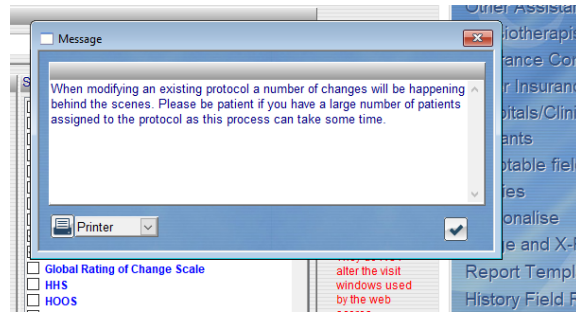
10. How do I find emails that have bounced or unsubscribed?

On the home screen, go to Reports, then the Unsubscribe/Bounced tab. Type in the date range, then any email addresses that have bounced or have unsubscribed will show up. This will automatically change the notification method in the patient's notification tab, and the email address will no longer be in yellow. To change it back to "patient email", see FAQ 3.



11. Can a time point or a score/s be changed/added/deleted in the protocol?

Time points and scores can be changed at any time in a protocol. However, **be sure that this is what you want to do**. If you make a change to a protocol, ALL surgeries assigned to that protocol will get the changes. The next time the scores get sent out, you will get the following message as soon as you click the Save button:

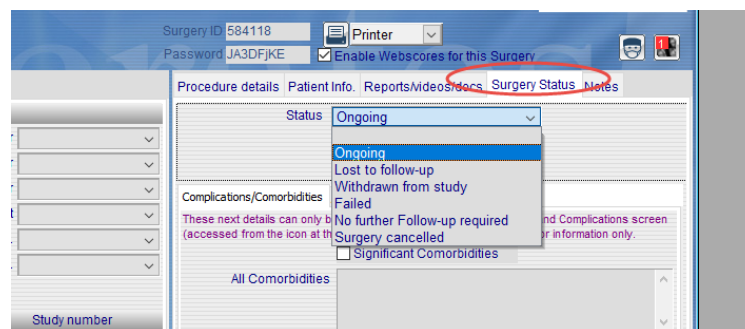


After clicking the blue tick, it will then send the new/changed details for ALL surgeries in that protocol to the web server. Note that this doesn't mean that all the patients in that protocol will get an email, they will still only get what's due but the changes have to be sent and saved to the web server.

If you have thousands of records this will take some time. So, if you are making a change and have a big database, make the changes when you are not pressured for time.

12. If the surgery has failed, or the patient has died, will the scores still be sent out?

When scores are due to be sent out, the program first looks to see if the surgery status is Ongoing. If the patient is deceased, or the Status is anything but Ongoing, scores will no longer be sent out. If you don't change the status, Socrates won't know, and will keep sending emails out when scores are due. This is found on the tab below, it can be changed here or on the surgery follow up and complication screen.



If the patient is deceased this can be noted on the notification tab on the demographic screen and it will flag all records for that patient as no longer ongoing.

Birth name Race

The fields marked with * are the recommended minimum fields.

Address Patient keywords Notification Alternative Contact Notes EMR

☐ Patient deceased Date of death

☐ Don't send via email

☐ Patient email } Verify email address ☐ No ☐ Yes

☐ Other email

13. The surgery has failed, it is no longer web enabled nor Ongoing, but the email address is still yellow

It is still in yellow because the patient may have other surgeries current, or some may be added in the future. Therefore, the email is still active so they can receive emails with scores due for the other surgery.

For a surgery that has failed or is no longer ongoing, no more emails will get sent even if the email address remains in yellow. You can disable this if you want, but you would need to change it back later if more surgeries are added for that patient and you want them to receive scores by email.

Birth name Race

The fields marked with * are the recommended minimum fields.

Address Patient keywords Notification Alternative Contact Notes EMR

☐ Patient deceased Date of death

☒ Don't send via email

☐ Patient email

☐ Other email

☐ Patient has unsubscribed from emails

☐ Patient email bounced

14. How do we get to the patient link in the office?

There are 2 ways to do this.

- You can bookmark this link <https://webscores.socratesortho.com/webscores> on your iPad or tablet, click on it and then enter the ID and password.

name AAJER Ydrek Injury Exam Module Hip Arthroplasty

ent ID MTS 345 Side Right ☒ Bilateral

H FUP 30/04/2018 4y Surgery 23/11/2013 Protocol Total Hip replace

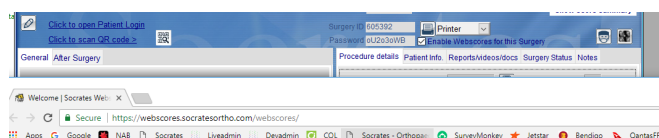
UP(s) Show score summary

ent ID 436849 Printer

ent ID Q6Sg8M2R Enable Webscores for this Surgery ☒

procedure details Patient Info Reports/videos/docs Surgery Status Notes

You will then see this window asking for the ID and password.



Patient Login

Please enter the ID number and password supplied by your specialist to login and complete any outstanding online questionnaires.

ID number:

605392

Password:

Submit

OR

- You can use the QR code to bypass the need for the ID and password. This is a quick way of accessing the patient link for filling in their scores when they are in the clinic. It contains the ID and password, and bypasses the need to enter these on the Socrates web scores link. Just take a picture of the code with your iPad/tablet using a free QR bar code reader.



Once you have entered either the ID and password or scanned the QR code, the surveys are ready for completion.

Questionnaires

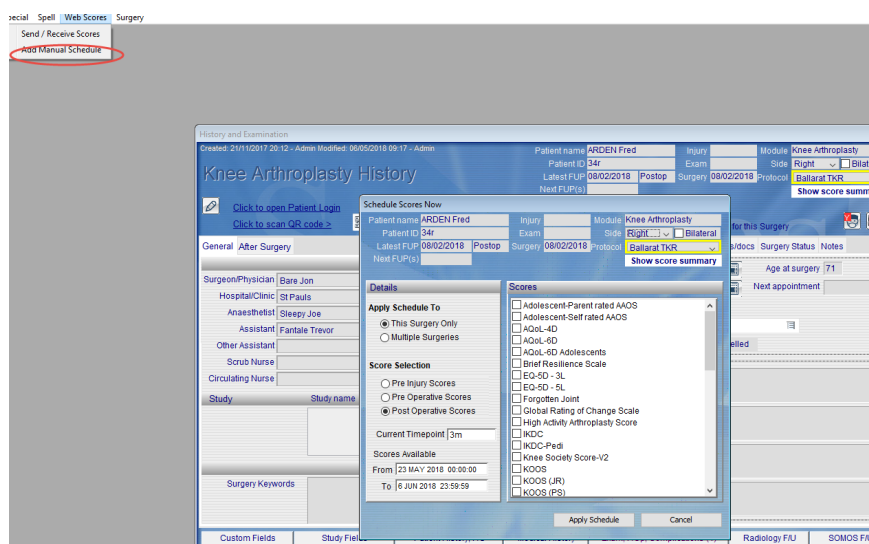
Fred Aarwill you have 3 questionnaires to complete relating to your RIGHT Hip. Please complete all of these by the due date.

Questionnaire Name	Please complete by
1 Oxford Hip Score	Tue, Jun 5, 2018
2 Pain and Satisfaction Survey	Tue, Jun 5, 2018
3 UCLA Activity Score	Tue, Jun 5, 2018

15. Can we send out additional or different scores/surveys to what is in the protocol?

You can use the manual/AdHoc method to send any of the scores at the current follow up time point to a single patient, or a group of patients.

- Sending for a single surgery: You need to be logged in to the relevant surgery. Go to the top menu bar, and select 'Add manual schedule'. This window will appear - select 'This surgery only'.



- It lists all the scores available for that module. It has also calculated the current time point/follow-up based on the date of surgery. If there is no date, it will send them out as Preop. Check the scores that you want to send, and then select 'Apply Schedule'. They will be sent out or made available to fill in in the clinic up until the date stated.
- Sending to a group or multiple surgeries: You can send scores to a selected group of surgeries. The scores will be sent out at whatever time point/follow up is current for each surgery in the group. For example, in January 2017 you want to send scores to all ACL surgeries that were done in 2016. Some were done at the beginning of the year, others throughout the year. The program calculates the follow up for all of the selected group based on the surgery date. When you send them out in January 2017, some of that group would have a 12 month follow up, and those in December 2016 would only be at a 1 month follow up.
- If you want to use this feature, you need to know how to search for the group you want to send the scores to. It is advised that you read the relevant section in the main manual for full instructions.
- An important point about the manual/AdHoc feature is that this is **completely separate and in addition to what's in the protocol**. If the patient already has a 3 month score due from their protocol, and you send a manual one at 3 months, they will have 2 lots of scores to complete and will have two separate 3 month scores entered in Socrates. If the patient is just late to fill out their scores, you would normally use the reschedule feature – see FAQ 5.

16. What's the difference between manual and reschedule?

A manual score is an **extra** score that will be sent out. It's always in addition to what's in the protocol. If the patient has missed their time point in a protocol it's usually best to just reschedule. A separate document explains this in more detail – see Manual vs Reschedule scores.

17. Can time points and scores be changed in a protocol?

You can change the time points and scores any time, but be aware that all records that have that protocol assigned to them will be changed. You will never lose any of the old/existing scores that were entered in the old protocol but if you ran a protocol report it would only show the scores and time points in the changed protocol. You can use the statistics, search or export function to see/analyse/export all the old and changed data any time. If you have a big database, it can take quite a while for the system to run through all the changes and assign

them to all patients in the updated protocol. The first time you send and receive scores it will also re-send all the changed info to the web server. It doesn't mean that all the patients will get emails, (they will still only get their emails when they are due), but the web server has to know that either time points or scores have changed. It's best to just change one protocol at a time, then send and receive after each one has finished so it won't hold things up too much.

Also, be aware that if a patient has already received an email but not completed their scores for one of the time points which you then cancel in your revised protocol, when they click on the link it will tell them that they have no questionnaires to complete. This is because the new protocol details have gone to the server so it has removed the old time point from the server and that score is no longer current or available.

18. How do we know that an email has been sent?

Check that the email address is in yellow, the record is web enabled and there is an ID and password.

The screenshot shows a patient record form for 'AB Fred'. Key fields include Patient ID, Latest FUP (16m), Next FUP(s), Surgery (97901), and Password (Ww27/Mxf). A checkbox labeled 'Enable Webscores for this Surgery' is checked. Below the form are dropdown menus for 'Reviewing Dr', 'Referring Dr', 'Other referrer', 'Physiotherapist', and 'Insurance Co.'.

If all the above are there, the email will get sent out the day they are due, check the web protocol summary for when that is. In the example below, the next scores email will be sent out on the 20th April 2019.

Pending Communication with Web Server

Latest FUP: 04/05/2018 | Postop: 04/05/2018 | Protocol: THR test

Next FUP(s): 03/06/2019

Timepoint	Due From	Due To	Score	Ready To S...	Score Comple...	Date Sent To Server	Date Received
Preop			EQ-5D - 5L	NO	NO	23 OCT 2017 16:36:...	
Preop			Forgotten Joint	NO	NO	23 OCT 2017 16:36:...	
Preop			Oxford Hip	NO	YES	9 SEP 2016 06:50:16	11 SEP 2016 13:43:37
Preop			Patient Satisfaction+Pain (Preop...	NO	YES	9 SEP 2016 06:50:16	11 SEP 2016 13:43:39
1m	20 MAY 2018 00:00:...	17 JUN 2018 23:59:59	Patient Satisfaction+Pain (Posto...	NO	NO		
1y	20 APR 2019 00:00:...	3 JUN 2019 23:59:59	Patient Satisfaction+Pain (Posto...	YES	NO		

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.

Close Summary