

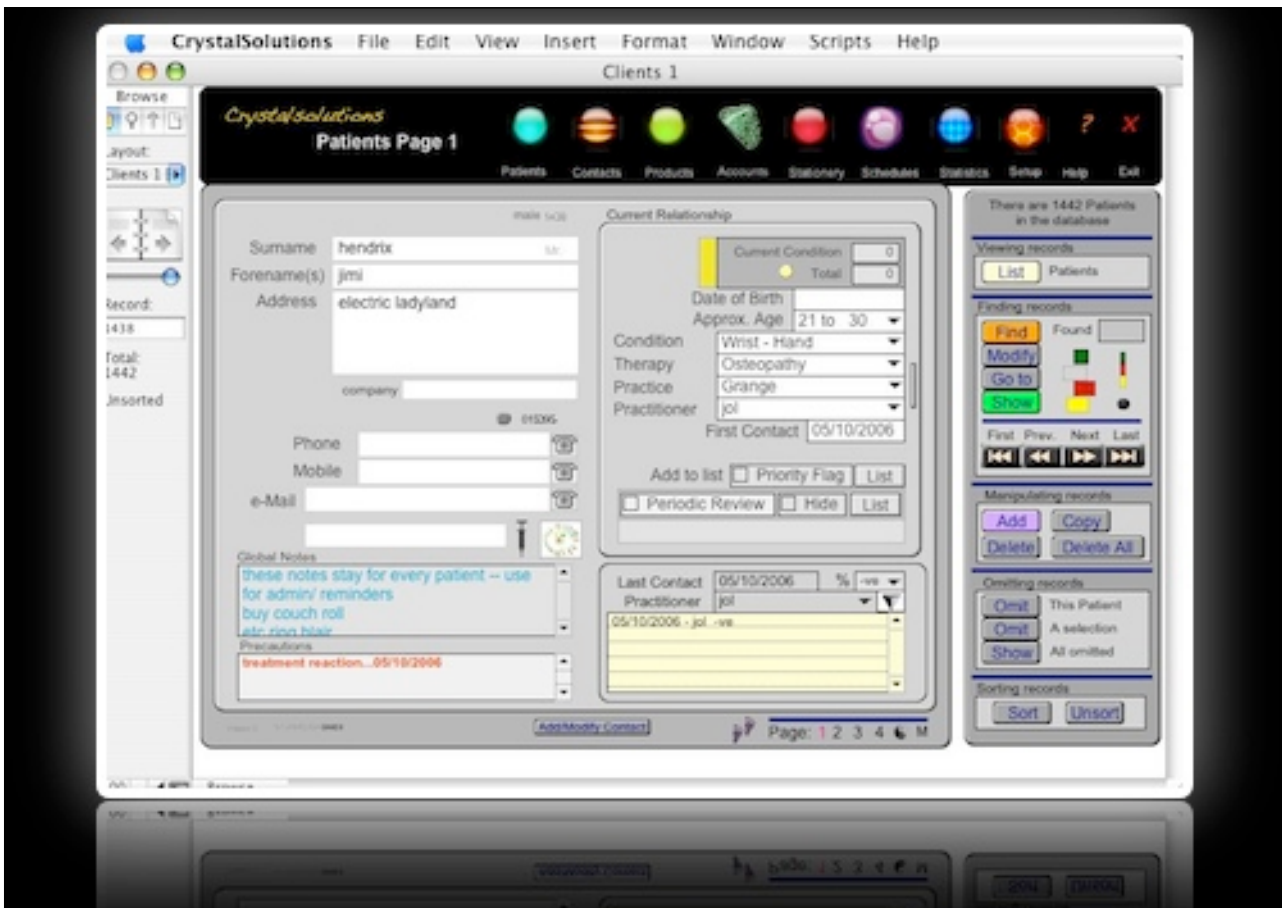
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# some thoughts on data collection for audit

## our experience with quality/clinical audit

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jol wardle - 2 February 2017



**\*\* 2026 update \*\***

we have, now that we are retired, completely reworked this software for others to use— take a look at its features and try out the free working demo (no install necessary) <https://soul-trade.com/software.html>



eg telephone codes — 3 of our local codes are set up so that 1 button inserts the code, and all we need to do is to type in the number. The same is used for many fields of info e.g. practice locations and conditions can be chosen from editable drop down menus.

When I have been asked to speak about the software in the past, I have often begun with extolling the magic new re-discovery of the product you can put behind your ear, the one which works upside down with no battery and can also erase text.

The use of a 50 pence pencil/biro is unbeatable in practice and we use pre-printed A4 case history sheets, customised to remind us of what is required for good case history taking and treatment recording (we have recently added "Consent? are you happy for us to continue" as an aide memoire to be ticked while in a Consultation)

Years ago I tried inputting data in the clinic direct onto the computer/tablet, but was unhappy that I was having to look away from the patient — it really is a distraction as far as I am concerned, and I loathe the GP eyeing their screen all the time — so that experiment lasted only a few days.

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page help for much more...  
click ? (top right) of any page

**step 1** ADD NEW RECORD

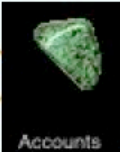
**step 2**  
type in name & address & tel

"click this to insert most common telephone codes –add your most common code to the list by choosing Edit at the bottom of the list of numbers

**step 3**

"this takes u to setup /system where u can change practice, therapy and practitioner defaults and set screen size ... click 'quickstart' in Scripts above to return here


**step 5**



click **Accounts** on top bar, then either, use *its* Page Help ? top right to guide you completing your new patient's payment or return here (click 'quickstart' in Scripts at top, to return here) and click Next to go to Quickstart B

**step 4**

"click little triangle to update treatment history below – inserts today's date, the practitioner and % improvement into notes. If you choose -ve in percentage then a red treatment reaction text with date appears in Precautions"



Help

It was then that we really evolved our software to be able to quickly input details, when we got home in the evening – tired. We also had several practices at the time, and it was useful to be able to sort out the different practices. Typically we can input Data in under 5–10 minutes. (see Quickstart link <http://www.crystalsolutions.org/csHelp/Help/QUICKSTARTa.html> ). The program can also then be used at home to find a phone number of a patient at a different practice for example.

If an audit is undertaken, and we say find a group we wish to examine closer, we can then refer to the definitive relevant hand written case histories in the practice, if we hadn't inputted sufficient data on the computer. (If the required data has been inputted then the task is even easier and we can then ascertain that say 70% + of the example female neck group with whiplash symptoms, derived 60% or more improvement in symptoms. We might then look at the 30% who didn't get any benefit and see if there were any common signs or omissions or treatment failures — i.e. where we might improve our CPD by seeing if there were any technique courses or courses specialising on 'whiplash' or RTI etc

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**step 1** FIND RECORD

**step 2**  
type in name  
then click Find  
again

you can find –  
using criteria  
from any field,  
or modify the  
find criteria by  
clicking Modify  
(below Find)

Show all records  
(green button)  
after a Find to  
ensure your total  
database is  
available

**step 4**

Show all records  
(green button)  
after a Find to  
ensure your total  
database is  
available

**step 3** add more details...  
syringe takes you to medicines, supplements,  
herbs and homeopathic remedies, the pic to  
its right, takes you to x-ray's and scans,  
imported reports or where u can record  
directly or view films

see page 1 help for much more...  
click ? (top right) of any page

If you already have practice software, you will probably be able to use it like this (i.e. in conjunction with written notes) to complete an audit on say treatment approaches and outcomes.

If you haven't, you are welcome to try our software, which is free to download and allows for 35 records to be used, before requiring purchase (you can even delete those records if you wish and trial another 35).

The program is a little difficult to use at first (and full of stuff you will probably never use — we evolved it for use by other Therapists over the years) and so we have provided manuals tutorials FAQ's etc as we went ( see <http://www.crystalsolutions.org/csHelp/Help/QuickStart.html> ) and can even help you over the phone or Skype if needed

At present the last version is probably 6 or 7 years old now, works on windows and mac desktop machines, but not so well on tablets and phones (only apple IOS) — I keep meaning to bring out a dedicated IOS version but time ..... ;)

Anyway to recap, if you haven't any computer input, a computer or tablet can be a very useful addendum to your practice, especially if you wish to find and analyse data in groups other than by alphabetical Names.

You can email me at [jol@crystalsolutions.org](mailto:jol@crystalsolutions.org)

"click this color pain/emotion indicator to get the color that best represents patient's pain/emotion status --or use to group records by colour for projects, mass mailings etc --- cycles yellow red green"

"this takes u to setup /system where u can change practice, therapy and practitioner defaults such as screen size"

"find green, or red or yellow or no colour great for grouping people or finding acutes/chronics for audit or follow up"

"Click this Title TO INSERT CAUTION MESSAGE IN PRECAUTIONS Box BELOW - This is a toggle button ie it will remove text that already exists in the precautions field"

"to medicines, herbs, homeopathic remedies and supplements on page 3"

"this is the x- ray container from page 4/ right click to insert pictures /films or record dictated notes instantly"

"click here to print reminder letter or patient advice letter - hydrotherapy, 5-day diary request, relaxation and dietary advice etc"

"an individual's treatment history - this button will take you to a print receipt layout"

"SET COLOUR ...organises a 'Found set' of records by colour .using the pain colour indicator .... choose from green, yellow or red .....be SURE this is the group you want to assign - this will overwrite all the pain colours in the found set-- Click Cancel if unsure"

"clears 'Found' set of colour"

"click here to update treatment history below - inserts today's date, the practitioner and % improvement into notes. If you choose -ve in percentage then a red treatment reaction text with date appears in Precautions"

(you can choose , instead of percentages, Time in hours & minutes which gives you the ability to record time spent on Legal Reports on different days or CPD ,, just click in the percentage field above the arrow to make your choice, before clicking the arrow) (see also, CPD in Scripts Menu at top)

"to Podiatry & Reflextherapy"

"to 5 elements"

"MASS Mailing Management..... use Find/modify Find to create a Found Group which is imported when this file is opened (note if no found group is set up before clicking MASS Mailing Management, then ALL client/patient records will be imported. Use the Set colour and Find Colour buttons to create groups, especially useful after setting up an initial Found set. (see Example)"

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