



SURGICAL REVIEW CORPORATION

COE System Help Guide:

User Registration & Account Creation

INTRODUCTION

SRC's proprietary, online center of excellence (COE) system allows users to register, create accounts and submit applications. This help guide provides general instructions for registering users and logging in as well as creating and managing accounts. Additional instructional resources are also available:

- **Help text:** Help text is displayed throughout the COE System to guide you through the process of designation.
- **Training webinars:** Contact SRC training staff at Training@surgicalreview.org if you would like to set up a training session for your team on the COE system.

The COE system functions with Internet Explorer (IE) version 7 or higher and Mozilla Firefox 3.0 or higher. We use pop-ups and request you add the website to your list of secure sites and always allow pop-ups for www.surgicalreview.org.

In addition, the system will automatically send you important emails throughout the designation process that contain instructions, links to resources, etc. Therefore, be sure to check your spam folder regularly or ask your IT administrator for permission to add "@surgicalreview.org" to your safe-sender list so that you are able to receive all system-generated communications from SRC.

REGISTERING A USER

Each person who needs account access must first be registered as a user in the COE system. A person can register themselves or be tasked with registering multiple users on behalf of the hospital, surgeon or practice. Registered users can create, update and manage accounts.

1. Navigate to www.surgicalreview.org.
2. Select the appropriate COE program for which you want to register.
3. Click the "Register" link.
4. Create the username and password you will use to log into the COE system. Your username, which must be unique, can be any length and feature any combination of letters, numbers and special characters. When creating your password, be sure to use the password tool as a guide to make sure it's secure.

The screenshot shows a registration form with two main sections: 'Authentication Credentials' and 'General Information'. In the 'Authentication Credentials' section, the 'Username' field contains 'user1' and has a 'Check Availability' link below it. The 'Password' field contains two red dots and has a red error message below it: 'You must create a password with high security.' The 'Confirm Password' field is empty. In the 'General Information' section, there is a dropdown menu for 'Select your displayed language' with 'English' selected. A dark grey tooltip points to the password field, containing the text 'Low security. And caps?'.

5. Enter contact information.
 - Required fields are marked with a red asterisk. The email address you enter must be unique; you will receive an error message if the address is already being used by another registered user.
6. Press the “Create a Registered User” button. A confirmation email will be instantly sent to the address provided in your contact information.
7. Open the confirmation email and click the link to activate your user(s). A confirmation message will display along with a link to log in. Enter your registered username and password and click the Sign In button or press the Enter key on your keyboard.

LOGGING IN

Only registered users can log into the COE system. If you’ve not yet been registered as a user, please refer to the section above. If you are already a registered user, follow these steps to log into the COE system:

1. Navigate to www.surgicalreview.org
2. Select your COE Program.
3. Click the “Login” link.
4. Enter your username and password. If you cannot remember your username and/or password or you are having trouble signing in:
 - Click the “Can’t Sign in” link.
 - Select either “Recover your Username” or “Reset Password.”
 - To recover your user name, enter the email address you provided in your contact information. Click the “Recover” button. To reset your password, enter your user name and email address. Click the “Reset” button.
 - SRC will send your username or a system-generated password to your email address so that you can reset your login information.
 - Reset your password.
 - Login using the system-generated password contained in the email.
 - Navigate to “User Profile.”
 - Create your new password, using the password tool as a guide for creating a secure password.
 - Press the “Update” button.

CREATING ACCOUNTS

To establish your “center” that will apply for provisional status and designation, you must create at least one hospital, practice and surgeon account. You may create as many accounts as necessary to include all facilities and surgeons within your program.

Before you begin, take a moment to gather the names, phone numbers and email addresses of the people who will serve as contacts on the account, such as the Administrative, Billing and Marketing/PR contacts. The Legal Business name of your hospital or practice is required, so you may need to get this information in advance from your supervisor or another employee.

From the main navigation bar, you can manage and create new accounts:

1. Use your mouse to scroll over the “Accounts” section of the navigation bar to display the drop-down menu.
2. When the drop-down menu appears, mouse-down to “Create an Account” and select the type of account you want to create (hospital, practice or surgeon).
3. Create your account.
 - Enter your account contact information. For hospitals, these include the Account, Administrative, Billing and Marketing/PR point people. For surgeons, contacts include those who handle the account, administrative and billing responsibilities. For the practice, this includes the account, BOLD Administrator, Bartiatric Coordinator, Public and Marketing/PR contacts.
 - If you or another person performs more than one role, use the “QuickFill” tool to populate contacts with previously entered information.
 - Answer the questions contained in the profile section.
 - Press the “Save/Next” button to save all the account information you entered.
4. The Account Summary page displays, indicating that you have successfully created an account.

MANAGING ACCOUNTS: THE MANAGEMENT CONSOLE

The Management Console is where you can create and manage your accounts as well as view your shared accounts. You can navigate to the Management Console by mousing-over “Accounts” on the main navigation bar. You can reach the Account Summary page for each account you have access to through the “account cards” on the console.

Home User Credentials Accounts ▼ [Contact Us](#)

Manage Accounts

Hospital ▼ Create

All Hospital Practice Surgeon



HospitalOne
100 Rio Ave
Rio de Janeiro, Rio de Janeiro, 59010
Brazil
555-555-5555
Hospital@facility.com
Acct #: 13F265F

[Summary](#) | [Edit](#)



Surgeon Practice
200 Main St
Rio de Janeiro, Rio de Janeiro, 59010
Brazil
555-555-5555
Practice@SurgicalGroup.com
Acct #: 23C6781

[Summary](#) | [Edit](#)



Surgeon User
123 Main St.
Rio de Janeiro, Rio de Janeiro, 59010
Brazil
555-555-5555
surgeonoffice@practice.com
Acct #: 37D07F7


[Summary](#) | [Edit](#)

USING THE ACCOUNT SUMMARY PAGE

The Account Summary page functions much like a landing page for a particular account. The practice's Account Summary page will have fewer tabs than those for the surgeon or hospital.

1. From the main navigation bar, mouse-over "Accounts."
2. When the drop-down menu appears, mouse-down to "Manage."
3. The account "Management Console" displays.
4. Select the account you want to access by either clicking inside the account card or by clicking the "Summary" link within the account card.
5. The Account Summary page contains a variety of information for understanding and handling your account:
 - **Designation Progress bar:** Located at the upper right hand corner of the Account Summary page, the bar will guide you through the designation process and help you complete all your required actions.

Designation Progress (5 of 12 steps)



Current status: Provisional participant, Designation requirements complete


Next step:

- Please wait for SRC Support to contact you.

- **Account tabs:** You will use the tabs to complete the steps needed to achieve each milestone (provisional status, designation and renewal). The following tabs will become available as you progress through each stage of the designation process:

- **Profile tab:** includes all account contact information, answers to your profile questions and - for surgeons and hospital accounts - the agreed to Terms and Conditions.
- **Linking tab:** enables you to initiate links and displays all the links that have been established for your account.
- **Sharing tab:** enables you to initiate account sharing and manage shared users.
- **Invoice and Payment tab:** displays all issued account invoices and associated payments.
- **Applications tab:** enables you to create, update and submit an application for the account (surgeon or hospital). The tab displays the date the application was created and allows you to view the information you submitted for provisional status or designation (“snapshots”).
- **Actions tab:** enables you to view the action items (“actions”) that must be completed to progress to the next step in the designation process. The tab displays the status of all your recent action items and allows you to access related documents through the “View” icon.
- **Notes tab:** displays the notes that have been added to the account.
- **Email History tab:** displays all system-generated emails sent to the Account Owner. Emails sent to users by individual SRC Support team members are not included here.
- **Resource tab:** displays supplemental documents involved in achieving Provisional Status and designation. Documents are “added” to your Resource tab as your account progresses through each designation step. Example resource documents include the BOLD packet, site inspection preparation materials and post-designation marketing guidelines.

Hospital Account



Account Information

Facility One
100 Rio Ave
Rio de Janeiro, Rio de Janeiro, 59010
Brazil
555-555-5555
Hospitalone@facility.com

Designation Progress (5 of 11 steps)


Current status: Provisional participant. Designation requirements complete
To proceed to Waiting for site inspection preparation materials to be returned step:

Profile
Linking
Sharing
Invoice and Payment
Applications
Actions
Notes
Email History
Resources

Account Number Initiate Link

Facilities must link to at least one surgeon who has bariatric privileges at their institution and who is applying to the program or is already a program participant. Facilities may link to more than one surgeon.

Linking Stats	Practices	Surgeons
Accepted	n/a	1
Requested	n/a	0
Deactivate Requested	n/a	0
Deactivate (Accepted)	n/a	0
Deactivate (Rejected)	n/a	0
Rejected	n/a	0

Surgeons	Status	Linking Options
J. Doe (361F5F0)		Deactivate

LINKING ACCOUNTS

Linking is the electronic mechanism within the COE system that connects the surgeon, practice and hospital to form the center. The linked center applies for provisional status – and ultimately for the "center of excellence" designation and renewal. In order for participants to remain in good standing, links must always reflect current, active relationships.

To create links, the surgeon, practice and hospital must first share their account numbers (which are sometimes referred to as SRC ID numbers) with one another. Therefore, before you begin, make sure to gather the account numbers you will need for linking. Account numbers are displayed at the top of the Account Summary page and on account cards within the Management Console.

Any party can then initiate a link request. For the link to become active, each request must be formally accepted by the recipient. All links can be managed (initiated, accepted, declined and/or removed) from the Linking tab, which is located on the Account Summary page.

- Surgeons must link to *at least one* surgical practice and *at least one* hospital that is either applying to the program or already a program participant. Surgeons may link to more than one hospital or practice.
- Hospitals must link to *at least one* surgeon who has bariatric privileges at their hospital and who is either applying to the program or already a program participant. Hospitals can link to more than one surgeon.
- Surgical practices must link to *at least one* surgeon who is either applying to the program or is already a program participant. Practices cannot link to a hospital.



Once linking is complete, each party may proceed to the next step in the designation process, which is indicated on the Designation Bar.

1. Initiating/requesting links

- From the Account Summary page, select the "Linking" tab.
- Enter the account number you want to link.
- Press the "Initiate Link" button.
- Your link request is sent to the account owner, who must accept it before the link is connected.

2. Accepting or rejecting link requests

- From the Linking tab, click "Accept" or "Reject" from the options located to the right of the link request.

3. All accounts that you are linked to will display on the "Linking" tab.

SHARING ACCOUNTS

Once you've created an account, you may share it with another person. This individual must be a registered user in the COE system (please refer to the "Register a User" section if this individual is *not* a registered user). Links do not need to be established before you can share an account.

Sharing is optional, and gives other registered users different levels of access to your accounts. However, providing another user with permission to access one account *does not* give them access to any of your other accounts.

1. From the Account Summary page, click on the "Sharing" tab.
2. Enter the username of the person with whom you want to share your account.
3. Assign one or more "permissions" to the new user based on the following definitions:
 - **Co-owner:** allows the user to have full access to the account, with viewing, editing and deleting permissions.
 - **View:** allows the user to read information based on access levels you select.
 - **Edit:** allows the user to read and make changes/updates to the account information based on access levels you select.
 - **Delete:** allows the user to read, make changes/updates and/or remove links and sharing permissions to the account information based on access levels you select.
4. Press the "Initiate Share" button.
5. An email is sent to the new user notifying them that the account has been shared with them.
6. All shared accounts will appear in your Management Console.
7. Conversely, when someone else has decided to share their account with you, the shared account card will also appear in your Management Console. Depending on the access levels assigned to you, certain tabs and features may not be accessible.

Share Account: HopsitalOne (13F265F)

Account HopsitalOne Is Shared With Users

[Initiate Share](#)

Shared with Users	Edit	Remove
This account is not shared with any users.		

Sharing Details

Account to share: HopsitalOne (13F265F)

with Username:

Grant co-ownership of account?

Share Account with User
Enter the username of the user with whom you wish to share account HopsitalOne (13F265F).

Module Access Levels	View <input type="checkbox"/>	Edit <input type="checkbox"/>	Delete <input type="checkbox"/>
Account Action Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Contacts and General Questions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Invoice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Linking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Sharing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

