



**SURGICAL REVIEW  
CORPORATION**

## **COE System Help Guide:**

### **The Application – Getting Started**

#### **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 completing the application. In addition, help text is displayed throughout the COE System to guide you through the designation process. It often appears as you type information into a data field.

#### **SYSTEM NOTIFICATIONS AND REQUIREMENTS**

Throughout the designation process, the COE system will automatically send you emails containing instructions, links to resources and other important notifications. To ensure you receive these system-generated communications, please add the domain **@surgicalreview.org** to your safe senders/safe recipients lists. In addition, ask your IT administrator to allow emails from @surgicalreview.org or add the domain to the global senders list.

Additionally, please include [www.surgicalreview.org](http://www.surgicalreview.org) in your list of trusted sites, and change your pop-up blocker settings to always allow pop-ups from this site.

➔ **Note:** The COE system functions with Internet Explorer version 7 or higher and Mozilla Firefox 3.0 or higher.

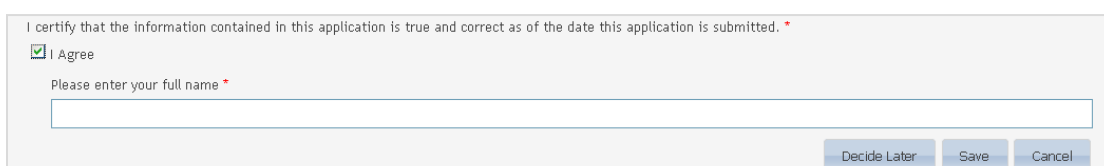
#### **BEFORE YOU BEGIN**

You must complete and submit your online application to receive provisional status and earn designation. Once your surgeon, practice and hospital accounts have been created and linked together, the application tab will become available. You can then create and begin working on your application. The invoice tab, which contains your application fee, becomes available as soon as you create your application. Your application fee must be paid before you can submit your application for review.

As a reminder, you can only create your links once you have completed your account contacts and profile information. For information on linking, please refer to the linking section of the "[User Registration & Account Creation Help Guide.](#)"

## APPLICATION CREATION, THE INVOICE AND THE COMPLETION INDICATOR

1. From the Account Summary page, click the "Applications" tab.
2. Press the "Create Application" button. The SRC's Terms and Conditions page opens.
3. Read the terms and check the box to agree.
  - Once you select "Agree," the terms and conditions will be placed on the Profile tab.
  - If you select "Decide Later" or "Cancel," the terms and conditions will continue to appear each time you access your application. You will not be able to submit your application until you agree to the Terms and Conditions.



I certify that the information contained in this application is true and correct as of the date this application is submitted. \*

I Agree


Please enter your full name \*

Decide Later Save Cancel

4. In addition, once you press the "Create Application" button, your invoice is automatically created. It can be accessed from the Invoice and Payment tab on the Account Summary page. Your invoice will also be emailed to your Billing Contact.
5. After the Terms and Conditions page, the Requirement Completion Indicator appears on the upper right hand side of your screen. The Indicator uses colors to identify the progress you have made on your answers to the requirement questions:





- **Gray:** indicates steps not yet started
  - **Yellow:** indicates an incomplete step
  - **Green:** indicates a completed step
  - **Blue:** indicates the current step
6. Use your mouse to scroll-over each requirement number in the Indicator. Help text will display the title of the requirement. You can also click on any individual requirement number to move directly to the page for that requirement. This is helpful for updating or changing information as you continue through the designation process, but remember to click "Save/Next" at the bottom of each requirement page before you move to the next requirement. *The COE system will not remind you to save your information.*
  7. Selecting "Print" in the Indicator will open a print window. You may print individual requirements, or the entire application.

8. The last circle in the Indicator represents the Application Summary page . This page summarizes all information entered, lists required elements that need to be completed and allows for submission and updating of the application, once qualifications have been met for provisional participation and designation. This page will also indicate:
- Requirement questions that are incomplete.
  - Answers that do not meet the qualifications for provisional status or designation.
  - Any required “Next steps,” if necessary.

This information can also be found on the Actions tab, located on the Account Summary page.

## HELPFUL TIPS

Here are a few helpful tips before you begin your application:

1. The “click here” links on each requirement page allows you to access the qualifications needed for provisional status and additional information about the designation requirement.
2. The following icons provide useful information for completing requirement questions:
  - The Information icon gives a more detailed explanation of the requirement question. 
  - The Help icon offers assistance or additional instruction when answering a requirement question. 
3. A red asterisk (\*) next to a question means an answer or comment must be provided. Questions without a red asterisk can be left unanswered; you will still be able to progress through the application. However, you *will not* be able to submit your application for review unless all questions have been answered.
4. Click “Save/Next” at the bottom of each requirement page to save your information and proceed to the next requirement. The system will automatically display a warning message after 55 minutes of inactivity. If you do not take action within 5 minutes of the warning message, the system will time out and any information that has not been saved will be lost.
5. Click “Save/Exit” at the bottom of each requirement page to save your application and return to it at a later time.
6. Use the comment box at the end of each requirement page to provide additional information or further explanation for any of your answers.



The screenshot shows a text input field for providing additional comments for Requirement 1. The field is titled "Requirement 1 Comment(s)" and contains the instruction "Please provide any additional comments to explain your answer(s) for Requirement 1". Below the text area, it indicates "1000 characters remaining". At the bottom of the form, there are three buttons: "Save/Next", "Save/Exit", and "Cancel".

## SUBMITTING YOUR APPLICATION

Provisional status must first be obtained before you can earn designation.

To earn provisional status, first complete all requirement questions. If all required answers have been completed and indicate that you have met the qualifications for provisional status, (and your invoice has been paid), the “Submit Application” button will appear on the Application Summary page. Click “Submit Application” to send your application to SRC for review.

You will be notified via email that you’ve achieved provisional status and any required next steps. As a reminder, provisional status does not require a site inspection and you cannot advertise or publicly market this status.

All of the steps to submit your application have been successfully completed. You may now select the 'Submit Application' button below.

Submit Application

## UPDATING YOUR APPLICATION

Once you have received provisional status, you can modify your initial application information as many times as you want to reflect the progress that your program has made toward designation. The COE system – on the Application Summary page - will outline the areas you need to address before your application will be ready to submit for designation.

- To update your answers to an individual requirement, click on the appropriate number on the Requirement Completion Indicator. Once you have updated or changed your answers, click “Save/Next” at the bottom of the page to save your new information.
- Once you are satisfied that your answers meet the requirements for designation, click “Update Application” to send your application to SRC for review. You will be notified via email that the requirements to earn designation have been satisfied and any required next steps.

## SPECIAL NOTE

If, however, your initial answers to the application indicate that you are already in compliance with the designation requirements, you *will not* be required to update your application. Instead, you will receive an email indicating that you have achieved provisional status and are a candidate for designation. This means that you will soon receive site inspection preparation materials. During the site inspection, SRC site inspectors will verify your application answers which will form part of the information that is evaluated by the review committee.

