BOLD
Surgical Review Corporation™
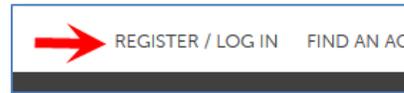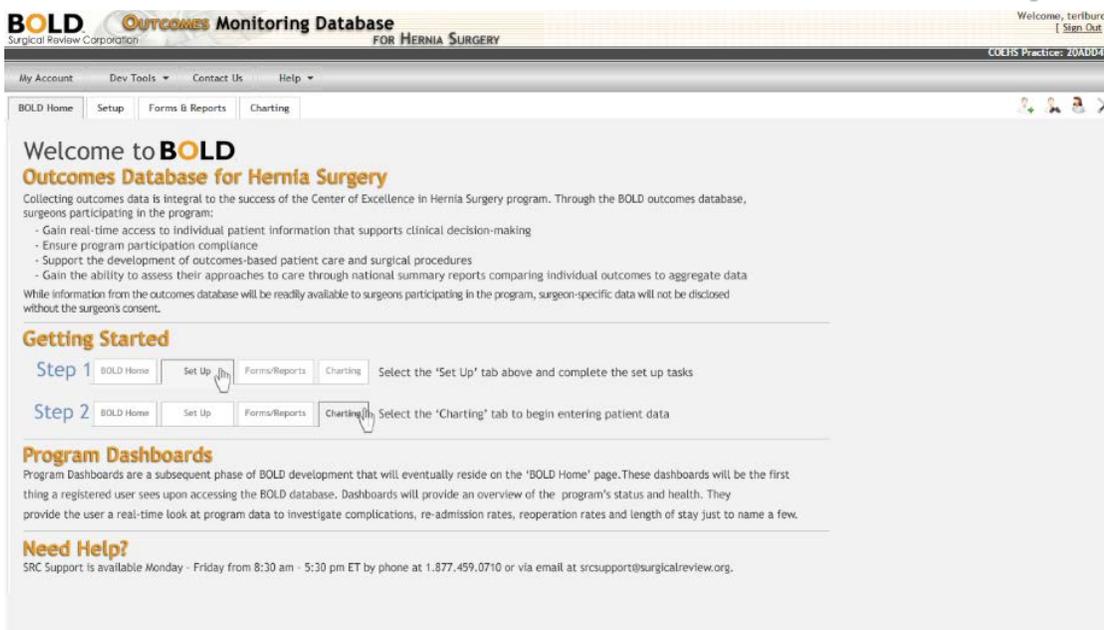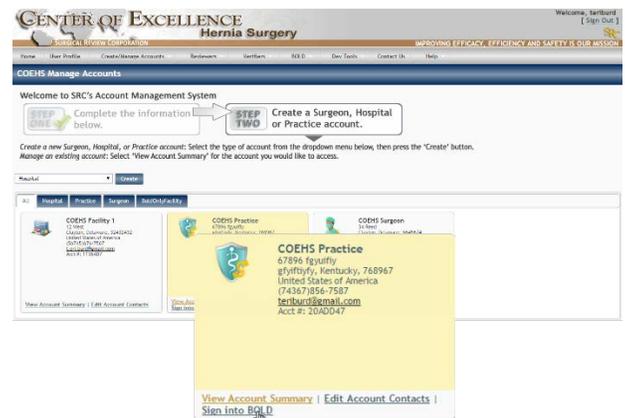
Accessing the BOLD Database

1. Go to www.surgicalreview.org

2. Click on the **Register/Log In** link in the upper right corner, then click **Log In**

3. Enter your username and password, then click **Sign In**

4. On the *Manage Accounts* page that appears, go to your practice account (the box with the shield/rod of Asclepius icon) and click **Sign into BOLD** at the bottom of the box

You are now logged into BOLD. *To log out, click **Sign Out** in the upper right corner.*

Navigating the BOLD Database
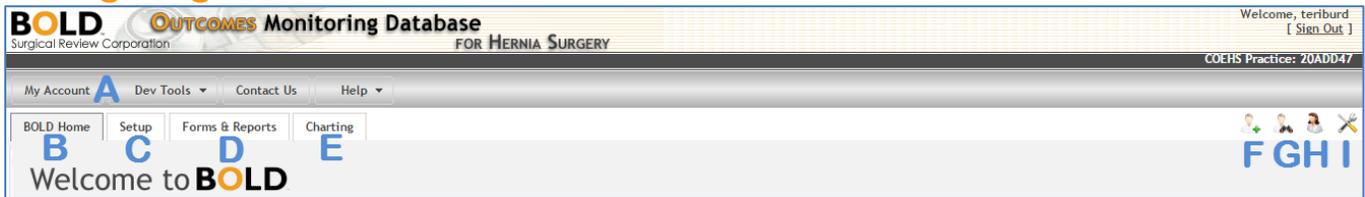
A. **My Account:** takes you to the *Manage Accounts* page in the account management system

B. **BOLD Home:** returns you to the *Welcome to BOLD* page

C. **Setup:** where you go to enter/view/edit surgeon, surgical assistant and facility information and set your preferences for units of measure, date format and more

- *Note:* when you log into BOLD for the first time, you will need to complete the Setup tab before you can access the Forms & Reports or Charting tabs

D. **Forms & Reports:** where you go to download/print patient encounter forms

- *Note:* only forms are currently available in this section – reports are a subsequent development phase and will be added later

E. **Charting:** where you go to create/view/edit patient records

F. **Add new patient** quick link

G. **Search for an existing patient** quick link

H. **Report a problem with BOLD:** opens a submission form that you can use to notify SRC of an issue you are experiencing with BOLD

I. **Tools**

Creating a Patient Record

1. Click on the **Charting** tab

2. On the *Add patient* page that appears, enter your patient's information into each field (a red asterisk ***** indicates the field is required)

   - **Chart number:** unique number assigned to each patient in BOLD

     – *Note:* the numbering system is determined by <u>your program</u>

   - **Name fields:** whether the patient's name is entered is a preference specified on the Setup tab (options are "Display as required," "Display as optional" and "Does not display")
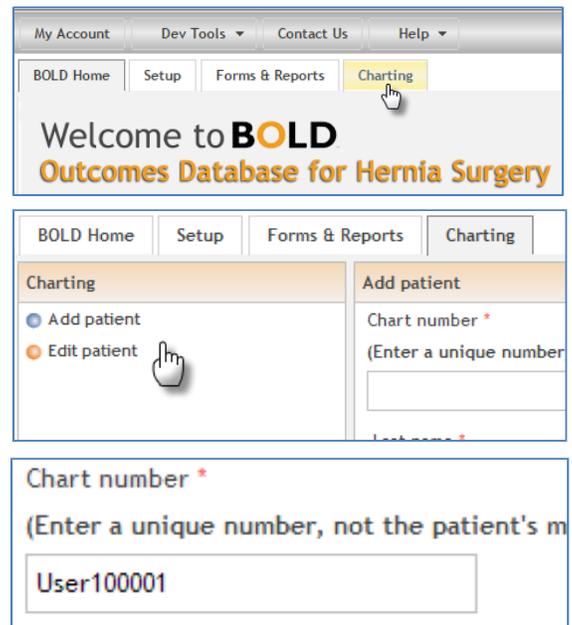
- **Year of birth:** only the birth year is entered to limit the private health information requested while maintaining the ability to evaluate patients by age
- **Race:** the categories displayed are a preference specified on the Setup tab
- **Patient Residence:** the Country dropdown menu defaults to the preference specified on the Setup tab, and it determines what populates the State/Province dropdown menu

3. Click **Save Patient and Add Another** or **Save Patient and Open Chart**

- **Save Patient and Add Another:** creates the patient's record, then opens a new *Add patient* page so you can create another patient record

- **Save Patient and Open Chart:** creates the patient's record, then opens their chart so you can continue entering data on the patient
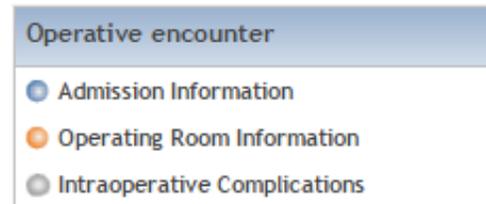
Navigating the Patient Record

The patient record contains tabs that correspond to the phases of the care experience, from registration to postop, in chronological order: Demographic, Payor, History, Preop Encounters, Operative Encounters and Postop Encounters. The tab highlighted in grey identifies the current section of the patient record.

Several tabs contain a sub-navigation menu on the left side of the screen. This indicates that the tab contains multiple pages. For example, the History tab has pages for Gynecologic Surgery History, Non-gynecologic Surgery History, Health History and Gynecologic History. The color of the circle to the left of the menu item indicates its status:

🟠 Completed page
🔵 Current page
⚪ Incomplete page

Clicking **Next** on each page will move you through the patient record in order.

Note: You must click **Next** to save the data you have entered on the page. Selecting other pages from the sub-navigation menu on the left side of the screen will abandon any changes made to the current page. If another page is selected, a message will appear alerting you that your changes will not be saved if you leave the current page.

Clicking **Yes** enables you to leave the page without saving your changes; clicking **No** returns you to the current page where you can click **Next** to save your changes and proceed.
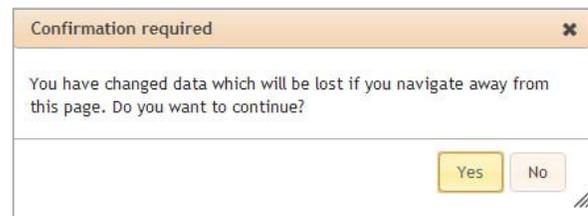
Completing a Patient Record

1. To open a patient record, click on the **Charting** tab:

   - **Patient to be entered in BOLD:** on the *Add patient* page that appears, enter information into each field, then click "Save Patient and Open Chart"

   - **Existing patient in BOLD:** select *Edit patient* on the left side of the screen, search or browse for the patient, then click on the patient's record to open it
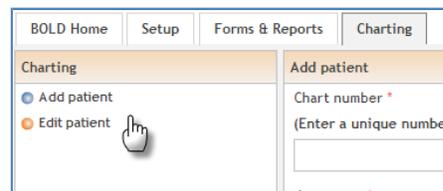
2. Enter or edit the patient's data, then click **Next** to move to the next page or tab

   - *Note:* a red asterisk * indicates the field is required

3. Continue entering data until you complete at least one preoperative encounter, operative encounter and postoperative encounter

Additional Information and Helpful Tools

Data Entry Options

1. Radio button: allows a single selection from the items listed

2. Dropdown menu: allows a single selection from the items in the list

3. Check box: allows multiple selections from the items listed

4. Text box: allows free text entry (primarily numerical data)

Patient Identification

Name	Chart number	SRC Patient ID	Age	Gender	Ethnicity
Patient001, Test	M001	541380	34	Female	Caucasian

Within each patient record, key patient information appears below the tabs near the top of the screen:

1. Name: this area will be blank if the patient's name is not entered (preference specified on the Setup tab)

2. Chart number: the unique identifier assigned to the patient by your program

3. SRC Patient ID: the unique identifier assigned to the patient by BOLD

   - *Note:* the SRC Patient ID is the number you will provide to SRC to identify the patient when you need assistance

4. Age

5. Gender

6. Ethnicity

Assessment Questions to Assist with Data Integrity

The BOLD database does not make assumptions about the patient. Rather than displaying data elements that could potentially be overlooked, BOLD uses assessment questions to determine if additional data needs to be collected.

For example, on the Hernia Surgery History page of the History tab, BOLD asks, "Did the patient have any previous hernia surgery?" Selecting **No** enables you to click *Next* and leave the page; selecting **Yes** displays additional data elements to complete.

Multiple Response Tables

When multiple items or events need to be documented, BOLD displays the items in a table.
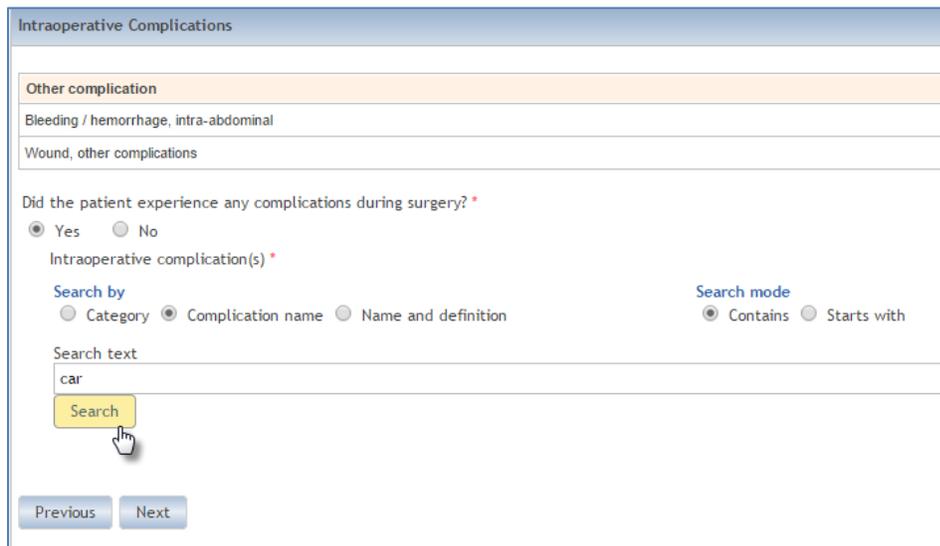
Using Hernia Surgery History as an example, for each previous gynecologic surgery, BOLD displays the year, type of surgery, surgical approach and source of surgical history as a table row. A new row will appear in the table after the data required for each previous gynecologic surgery is entered and you click **Add**. For each entry in the table, you can edit or delete it by clicking on the **Edit** or **Remove** icons to the right of the entry.

Search Function

Complications has a search function to help you quickly find what you need. For example, on the Intraoperative Complications page of the Operative Encounters tab, you can search for a complication by category, complication name or name and definition. To search for a complication by Complication name:

1. Click on the **Complication name** button

2. In the Search text box, type in at least three letters to identify the complication, then select the Search mode

   - **Contains** will search for the number(s) anywhere in the complication name
   - **Starts with** will search for the number(s) at the beginning of the complication name

3. Click **Search**

4. Locate the procedure in the table that appears, then click on the appropriate complication
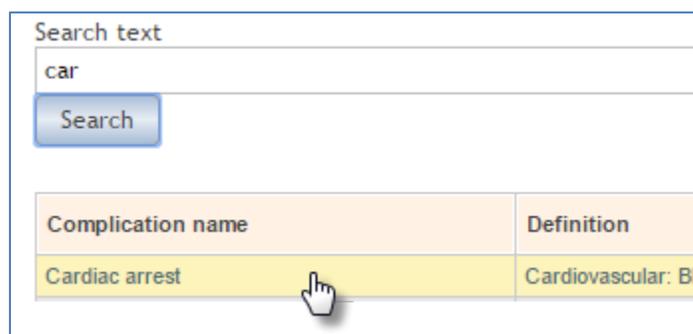
Questions?

SRC team members are available to answer your questions about the BOLD database. They can be reached Monday-Friday from 8:30 am-5:30 pm Eastern time at 1.919.981.4460 or bold@surgicalreview.org.

You can also submit a help request by clicking on the **Report a problem with BOLD** icon in the upper right corner of the BOLD database.