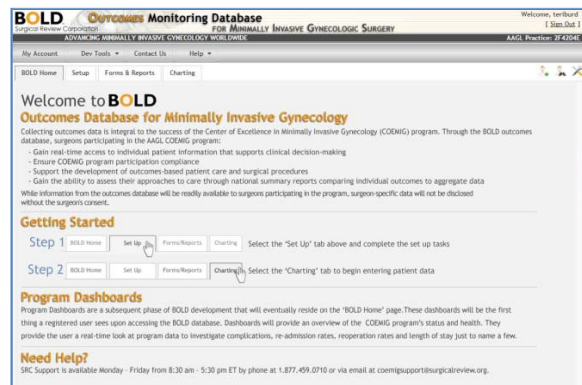
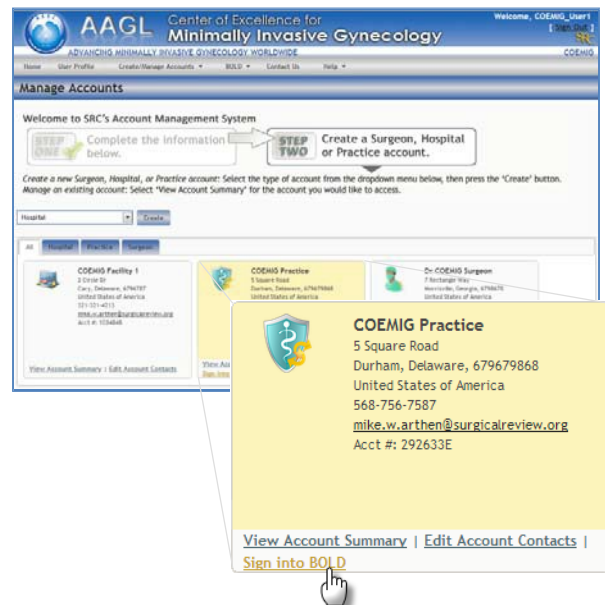
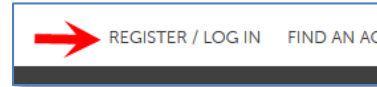


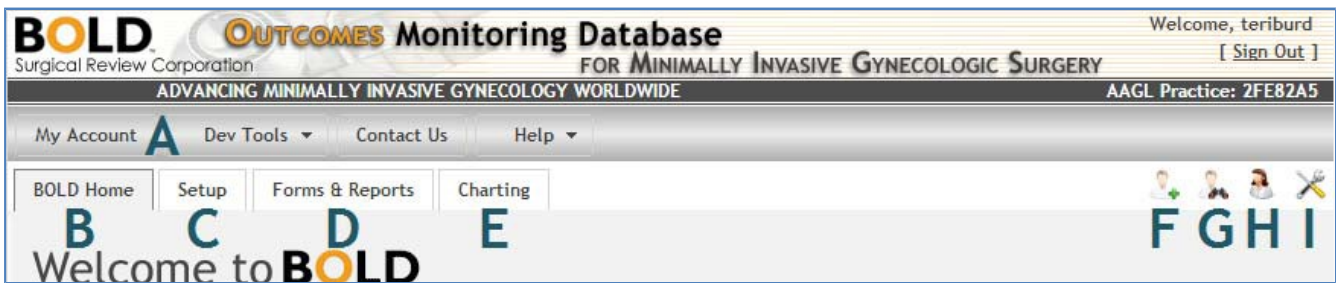
Accessing the BOLD Database

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.



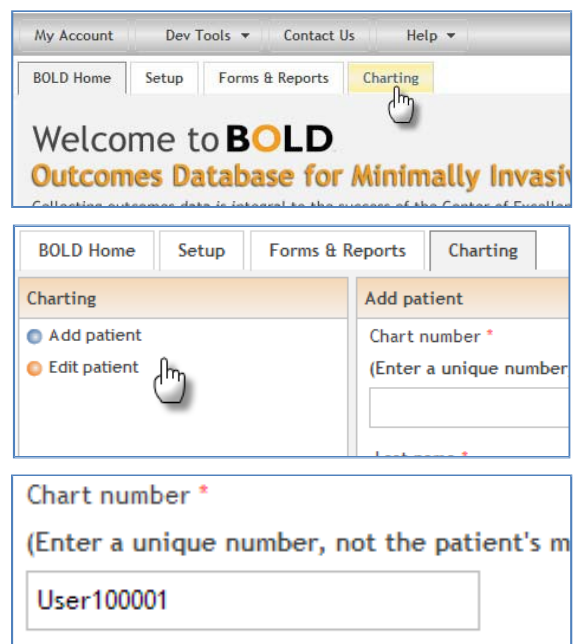
Navigating the BOLD Database



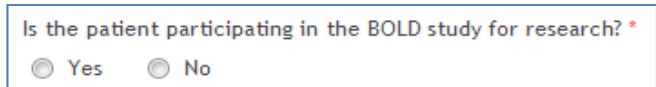
- A. **My Account:** takes you to the *Manage Accounts* page in the account management system
- B. **BOLD Home:** returns you to the *Welcome to BOLD* page
- C. **Setup:** where you go to enter/view/edit surgeon, surgical assistant and facility information and set your preferences for units of measure, 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 the BOLD Study Patient Information Sheet and 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 your program
 - **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")

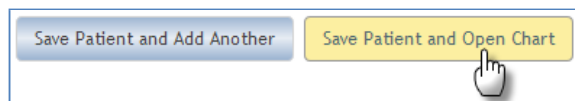
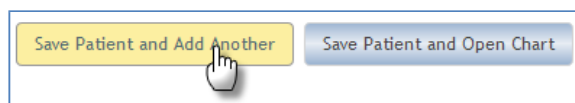


- **Year of birth:** only the birth year is entered to limit the private health information requested while maintaining the ability to evaluate patients by age
- **Race:** the categories displayed are a preference specified on the Setup tab
- **Patient Residence:** the Country dropdown menu defaults to the preference specified on the Setup tab, and it determines what populates the State/Province dropdown menu
- **“Is the patient participating in the BOLD study for research?”:** documents the patient’s decision regarding the use of their de-identified data for research (the “BOLD study”) after they have been provided the Patient Information Sheet
 - *Note:* the answer to this question does not determine if the patient’s data will be entered into BOLD – all patients who undergo a qualifying MIGS procedure after the date of BOLD activation must be entered



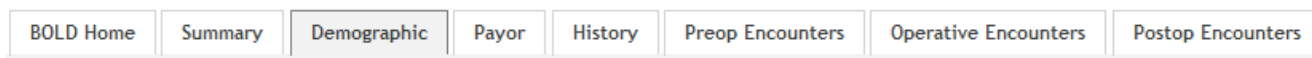
3. Click **Save Patient and Add Another** or **Save Patient and Open Chart**

- **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



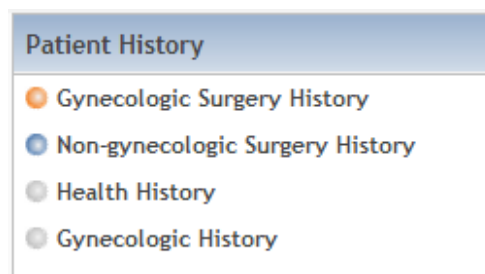
Navigating the Patient Record

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:

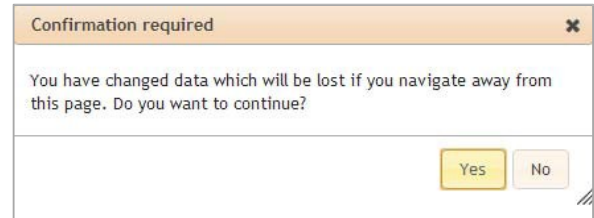
- Completed page
- Current page
- Incomplete page



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.

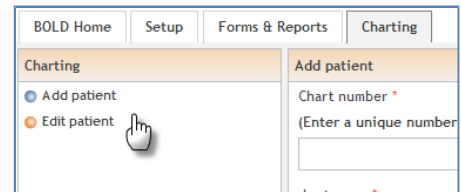


Clicking **Yes** enables you to leave the page without saving your changes; clicking **No** returns you to the current page where you can click **Next** to save your changes and proceed.

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

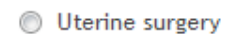
- *Note:* a red asterisk * indicates the field is required

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

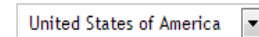
Additional Information and Helpful Tools

Data Entry Options

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



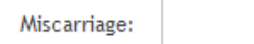
2. Dropdown menu: allows a single selection from the items in the list



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 Gynecologic Surgery History page of the History tab, BOLD asks, "Has the patient had any previous gynecologic surgery(s)?" 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 Gynecologic 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.

Year	Surgery/Procedure	Surgical approach	Who provided history?	Edit	Remove
2005	Surgical treatment of endometriosis	Laparoscopic	Operative report		

Search Functions

Surgical procedures and complications have search functions to help you quickly find what you need. For example, on the Operating Room Info page of the Operative Encounters tab, you can search for the surgical procedure performed by name or CPT code. To search for a laparoscopic fimbrioplasty by CPT code:

1. Click on the **CPT code** button
2. In the CPT code text box, type in at least one number from the CPT code, then select the Search mode
 - **Contains** will search for the number(s) anywhere in the CPT code
 - **Starts with** will search for the number(s) at the beginning of the CPT code

3. Click **Search**

Surgery/procedure

Search by: Surgery/procedure name CPT code

Search mode: Contains Starts with

CPT code

58

Search

4. Locate the procedure in the table that appears, then click on it

Search by: Surgery/procedure name CPT code

Search mode: Contains Starts with

CPT code

58

Search

Surgery/procedure	CPT Code
Hysteroscopy, surgical; with bilateral fallopian tube cannulation to induce occlusion by placement of permanent implants	58565
Hysteroscopy, surgical; with endometrial ablation (eg, endometrial resection, electrosurgical ablation, thermoablation)	58563
Hysteroscopy, surgical; with division or resection of intrauterine septum	58560
Hysteroscopy, surgical; with lysis of intrauterine adhesions - moderate to severe	58559
Hysteroscopy, surgical; with removal of leiomyomata (submucosal myomectomy - Type 0, I, II)	58561
Hysteroscopy, surgical; with removal of impacted foreign body	58562
Laparoscopy, surgical; with fimbrioplasty	58672
Laparoscopy, surgical; with fulguration or excision of lesions of the ovary, pelvic viscera, or peritoneal surface - qualify by SRM Stage II, III, or IV	58662
Laparoscopy, surgical, myomectomy, excision; 5 or more intramural myomas and/or intramural myomas with total weight greater than 250 g	58546
Laparoscopy, surgical, myomectomy, excision; 1 to 4 intramural myomas with total weight of 250 g or less and/or removal of surface myomas	58545
Oophorectomy, partial or total, unilateral or bilateral; for ovarian, tubal or primary peritoneal malignancy, with para-aortic and pelvic lymph node biopsies, peritoneal	58943

The same search function is available for complications.

Did the patient experience any complications during surgery? *

Yes No

Intraoperative complications *

Search by: Category Complication name Name and definition

Search mode: Contains Starts with

Complication name

inj

New search

Complication name	Definition
Bladder Injury	Surgical: Any degree of damage to the bladder occurring during surgery.
Bowel Injury/Perforation	Surgical: Any degree of damage to any portion of the intestine occurring during surgery.
Ureteral Injury	Surgical: Any degree of damage to the ureter occurring during surgery.
Vascular Injury	Surgical: Any degree of damage to the vascular system occurring during surgery.

Primary Surgical Indications

The AAGL Outcomes Committee determined the BOLD database would collect data for five primary surgical indications:

1. Pain
2. Incontinence/Prolapse
3. Cancer (cervical, ovarian, uterine)
4. Reproductive Issues
5. Abnormal Uterine Bleeding

You can only identify one **primary** surgical indication. The primary surgical indication is selected when you enter data for the initial preoperative encounter. You will have the opportunity to select additional indications for subsequent preoperative, operative and postoperative encounters.

Primary Surgical Indication Pain Incontinence/Prolapse Abnormal Uterine Bleeding Reproductive issues Cancer

Has the patient been diagnosed with other surgical indications at this time? * Yes No

Additional indications/diagnosis (if observed at this time)

Incontinence/Prolapse Abnormal Uterine Bleeding Reproductive issues Cancer

The primary surgical indication (PSI) is displayed in the sub-navigation menu on the left side of the screen. Each additional surgical indication (ASI) selected during subsequent preoperative, operative and postoperative encounters will also be displayed in this menu.

A Quality of Life questionnaire appears at the end of each preoperative and postoperative encounter.

Preoperative encounter

- Add Visit
- PSI - PAIN:
 - Location/Intensity
 - Additional Information
- ASI - ABNORMAL UTERINE BLEEDING:
 - Assessment
- ASI - REPRODUCTIVE ISSUES:
 - Assessment
- ASI - CANCER:
 - Assessment
- ASI - INCONTINENCE/PROLAPSE:
 - Incontinence assessment
 - Prolapse assessment
- QUALITY OF LIFE:
 - Quality of Life

Interactive Diagrams for Pain

Interactive diagrams are used to ensure consistent data collection on pain location and intensity.

Example:

- Click **Posterior**
- Select the location
 - Click on the zone number in the diagram (A) -or-
 - Click on the check box next to the zone number in the list
- Select the intensity level
 - Click on the value in the blue Pain intensity slider (B), moving the slider to the left or right as needed -or-
 - Type the numerical value for the intensity level in the text box to the left of the zone number

Pain: Location/Intensity

Identify PRIMARY location and intensity of pain described by the patient: *

Genitalia Posterior Anterior

POSTERIOR

Intensity Location

- 1 - Coccyx region
- 2 - Sacrum
- 3 - Lower back
- 4 - Upper back
- 5 - Left posterior thigh
- 6 - Left buttock
- 7 - Left hip
- 8 - Left lower back
- 9 - Left upper back
- 10 - Right posterior thigh
- 11 - Right buttock
- 12 - Right hip
- 13 - Right lower back
- 14 - Right upper back

Pain intensity slider (14 - Right upper back)

Intensity Location

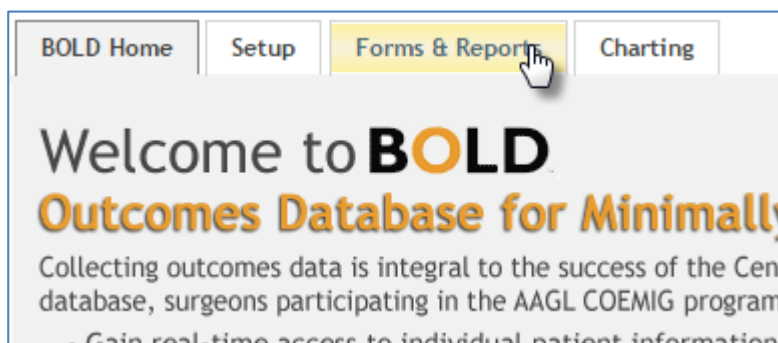
5.3

Did you perform a detailed pelvic floor exam? *

Yes No

Reports

Program reports provide detail and summary information for each phase of the patient experience. The BOLD Participation Agreement that is signed by the surgeon authorizes your program to use these reports as needed to benefit and promote your COEMIG program and to make adjustments to your program based on data analysis.



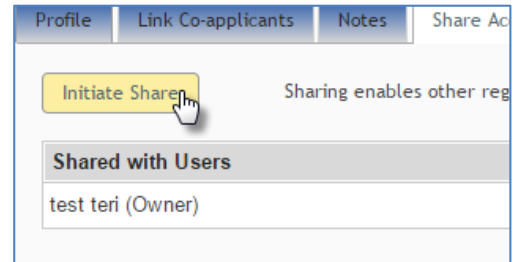
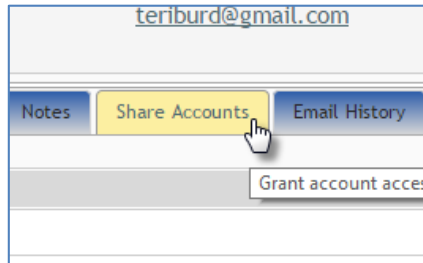
NOTE: If you attempt to access reports from different internet browsers (i.e. Internet Explorer, Chrome, Firefox, etc.) you will notice that they may render certain aspects of reports differently. Due to this inconsistent nature of how internet browsers render information differently BOLD reports have been optimized for Internet Explorer (non-compatibility mode).

Permission to View Reports

Registered users must be granted access to reports from the owner of the 'practice' account. If you can see the 'Forms & Reports' tab while logged into BOLD, then you already have access. If you see the 'Charting' tab but the 'Forms & Reports' tab is hidden, you'll need to have the owner of the practice account assign you permissions to access reports.

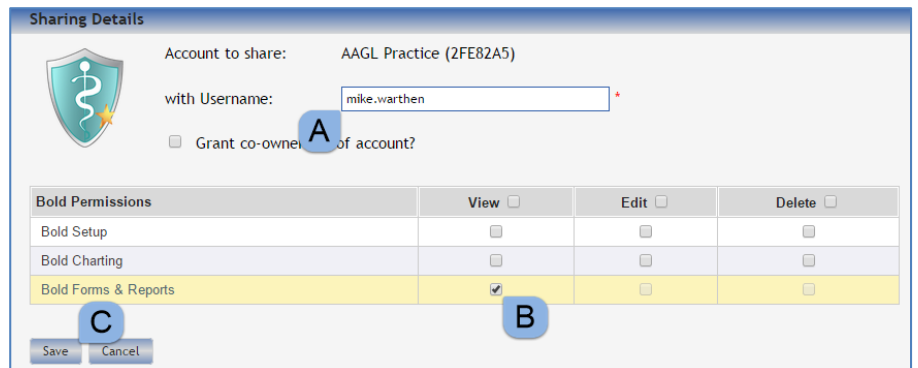
The owner of the practice account will need follow these steps to grant you permission to access reports.

1. Log in and select **View Account Summary** for the practice account
2. Select **Share Accounts**
3. Select **Initiate Share**



4. The practice owner will need to have your registered user name (not your password) to grant you permission to view reports.

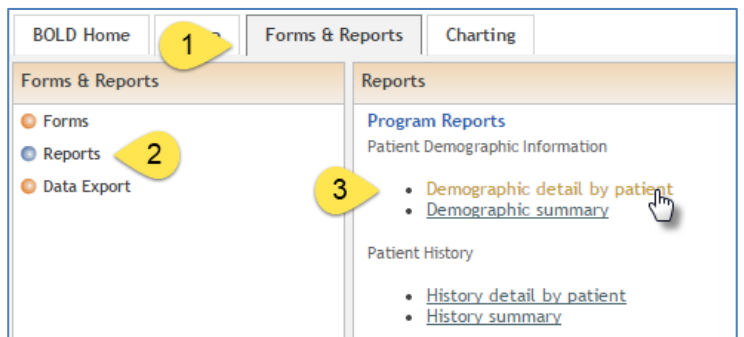
- a. Enter the registered username
- b. Select **View** to only have permission to access reports
 - This will allow you to view the **Forms & Reports** tab and open, print and, export program reports
- c. Select **Save**



Accessing Reports

With sufficient permission to access BOLD reports the **Forms & Reports** tab will be visible when you log into BOLD.

1. Select the **Forms & Reports** tab
2. Select **Reports**
3. Select the report that you would like to view. In the example, the *Demographic detail by patient* is selected



Opening Reports

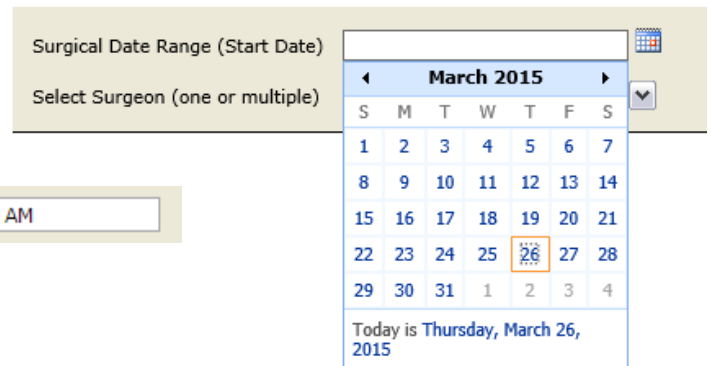
Upon selecting a report you will be required to enter parameters that will limit the data sample size by surgical date range, surgeon and facility.

NOTE: As an outcomes monitoring database, BOLD reports will only display data on patients who have a completed operative encounter entered.

1. Enter the **Surgical Date Range (Start Date)** – While you may enter dates in other formats, report date parameters must be entered as M/D/YYYY to retrieve the expected data set.

INTERNET BROWSER NOTE: Internet Explorer in compatibility mode will display a date picker to assist you with entering dates. Other browsers, such as Chrome will not.

Internet Explorer (compatibility mode)



Chrome



2. Enter the **Surgical Date Range (End Date)**

- The end date will default to 'Today' but can be changed if needed

3. Select the surgeon dropdown menu

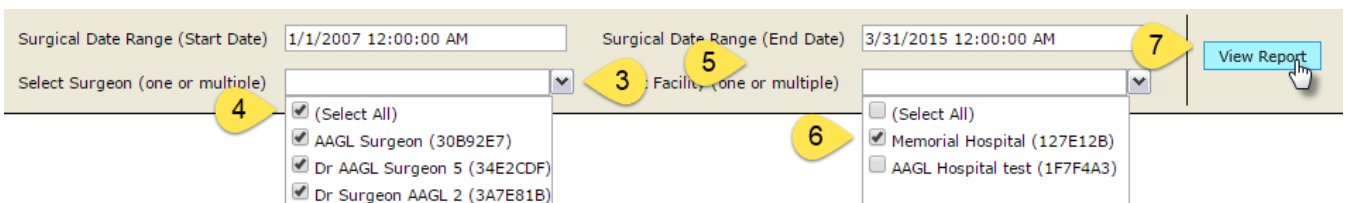
4. **Select Surgeon (one or multiple)**

- If there are multiple surgeons associated with this practice all of their data will be accessible in BOLD reports. The reports will be sorted by facility and by surgeon. You can (Select All) or select a single or multiple surgeons by checking the check box next to their name/account number.

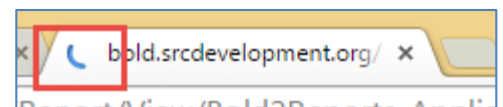
5. Due to the multiple selection functionality of the surgeon and facility dropdowns it is necessary to click your mouse somewhere after you make your surgeon or facility selections.

6. **Select Facility (one or multiple)** in a similar manner

7. **Select View Report**



8. Upon selecting View Report BOLD will be contacting the secure data server to retrieve your requested data. Please be patient-internet speed, the amount of data requested and other issues will determine the amount of time this might take. You will notice (depending on the internet browser you are using) some sort of dynamic indicator letting you know that the report is still in the process of retrieving your data.



Report Features

There are patient detail and program summary reports available to you. The detail reports will give you an overview of the patients represented sorted by facility and surgeon (if multiple are selected). Summary reports will group and total items depending on the nature of the data. Below are features that are common to both.

1. Chart navigation – Left, right and page number controls are available to navigate reports with multiple pages
2. Export – To export data that can be further manipulated or shared with others select the dropdown menu and highlight the format then select **Export**
3. Refresh data – Reports are generated ‘real time’. That means all of the data you enter will be immediately available for view in a report. The refresh button will allow you to get the most recent data if data is added or edited after the report is open.

NOTE: If you change any of the query parameters (dates, surgeon, facility) you must select View Report to impose that criteria on the data.

4. Report prepared on – This is the date and time the report was prepared on
5. Practice information – This is the name and account number of the practice
6. Surgeon and facility information – These are the name(s) of the surgeon and facility selected as query parameters
7. Sample size based on date range – This represents the sample size based on surgery date, surgeon, facility and area of interest.
‘Reporting on 5 unique patients...’ in the example below there are only 5 patients that meet the parameter requirements for the selected date range (with surgery dates from m/dd/yyyy to m/dd/yyyy)
8. Facility – These are individual facilities or locations where the surgery was done sorted by alphabetical order
9. Surgeon – These are individual surgeons listed by facility
10. Patient detail – These are rows of patient-specific detail information

Demographic Information Report - Patient Detail

Report prepared: 3/26/2015 2:00:56 PM

Practice Name: AAGL Practice | PracticeID: 2FEB2A5

Reporting on Surgeon(s): Dr. Adam Smith | AAGL Surgeon | Dr Surgeon AAGL 2 | Dr Surgeon AAGL 3 | Dr AAGL Surgeon 4 | Dr AAGL Surgeon 5 | Dr Surgeon Mig 7 | aagl surgeon 09142014 AND Facility(s): AAGL 09142014 | Facilitypayment test | Hospital 07142014 | AAGL Hospital test

Reporting on 5 unique patients with surgery dates from 6/18/2014 to 3/26/2015

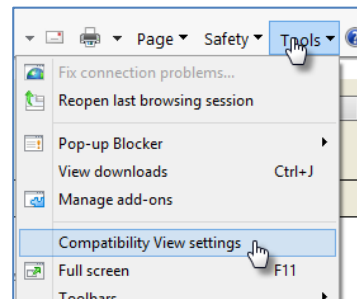
SRC Pt IID Select to open chart)	Chart Number	Surgery	Surgical Approach	CPT Code	Surgery Date	Age	Ethnicity	Primary Payment	Research Participant
AAGL Hospital test									
AAGL Surgeon									
545750	9032014	Hysteroscopy, surgical;	Laparoscopic	58561	6/25/2014	50	US_Caucasian	Medicare	No
542182	CJ00877		Laparoscopic		8/21/2014	37	US_AfricanAmerican	Private insurance	Yes
541414	mig	Hysteroscopy, surgical;	Laparoscopic	58563	11/3/2014	28	US_Native	Private insurance	Yes
548409	qol_coemig	Hysteroscopy, surgical;	Laparoscopic	58563	11/19/2014	39	US_Asian	Medicare	Yes
Dr AAGL Surgeon 5									
546193	mig_cancer 0919	Hysteroscopy, surgical;	Laparoscopic	58565	7/1/2014	50	US_Caucasian	Medicare	Yes

Printing Reports

Due to the inconsistency of how internet browsers render reports a Print button is only available in Internet Explorer (compatibility mode). Selecting ‘compatibility mode’ for Internet Explorer may result in other formatting issues. An alternate solution is to export the report in a PDF or Word format and print as you would any other document.

Internet Explorer Compatibility Mode

1. Select **Tools**
2. Select **Compatibility View Settings**
3. With surgicalreview.org in the Add this website: textbox, select **Add**

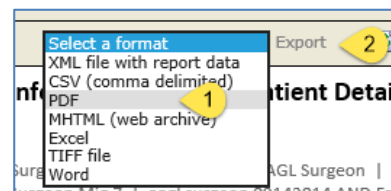


Exporting Data and Reports

Reports can be exported in a variety of formats.

XML – CSV – PDF – MHTML – Excel – TIFF file – Word

1. Select the format that will meet your needs
2. Select **Export**



PDF, Excel and Word are the most common.

PDF – This will allow you to print the report, as well as share with others without the option of editing the information on the report

Excel – Exporting data into a spreadsheet will allow you to further manipulate the data

Word – This will allow you (and other) to manipulate the information that is displayed. Take caution with exporting to any format that allows the information to be altered and possibly misrepresented.

When exporting a report your internet browser will ask you what you would like to do with the report that has been exported or rendered in an alternative format. For example, Internet Explorer will pose this question at the bottom of your screen.

541414	mig	Hysteroscopy, surgical;	Laparoscopic	58563	11/3/2014	28	US_Native	Private insurance	Yes
548409	qol_coemig	Hysteroscopy, surgical;	Laparoscopic	58563	11/19/2014	39	US_Asian	Medicare	Yes
AAGL Surgeon 5									
546193	mig_cancer_919	Hysteroscopy, surgical;	Laparoscopic	58565	7/1/2014	50	US_Caucasian	Medicare	Yes

Center of Excellence in Minimally Invasive Gynecologic Surgery Page 1 of 1

Do you want to open or save COEMIG_Demographic_Detail_AllSurgeonFacility.pdf from bold.srcdevelopment.org?

A screenshot of a report table with a blue arrow pointing to the 'mig_cancer_919' row. Below the table is a dialog box asking 'Do you want to open or save COEMIG_Demographic_Detail_AllSurgeonFacility.pdf from bold.srcdevelopment.org?' with 'Open' and 'Save' buttons.

Open a Patient Chart via a Report

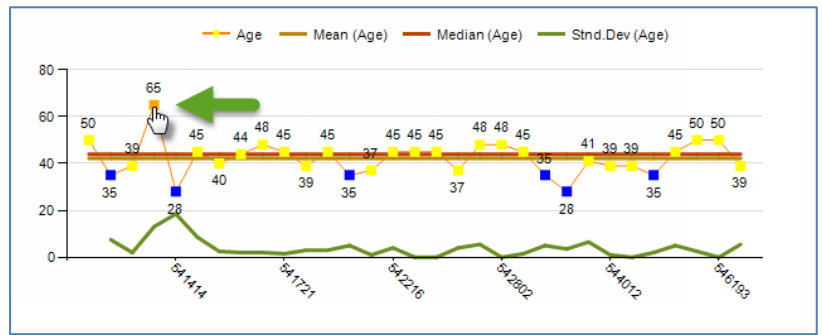
Detail and Summary reports offer a method to open the patient chart directly from the report to further investigate data anomalies.

The SRC Patient ID in detail reports or data points in summary reports have links to the patient record.

541414	mig	Hysteroscopy, surgical;	Laparoscopic	58563	11/3/2014	28	US_Native	Private insurance	Yes
548409		Hysteroscopy, surgical;	Laparoscopic	58563	11/19/2014	39	US_Asian	Medicare	Yes
AAGL Surgeon 5									

A screenshot of a report table with a green arrow pointing to the '548409' patient ID link.

NOTE: In order for this to function properly BOLD must still be open. This is a safety measure to prevent unauthorized users from gaining access to your data via a report hyperlink.



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.

