

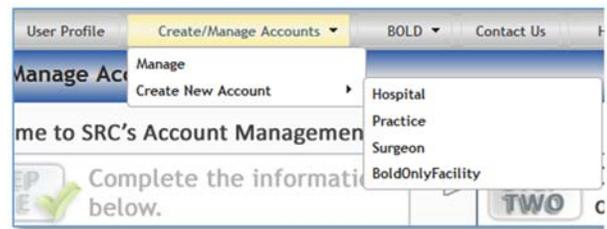
### Log in to the SRC account management system:

1. Open a browser and go to the page: <https://excellence.surgicalreview.org/Login>
2. Enter your user name and password.
3. Click Sign In.



### Create the hospital account:

1. Click Create/Manage Accounts > Create New Account > Hospital.



2. Enter the information requested and click Save/Next to continue. Required fields are marked with a red asterisk (\*).
3. If some of the details for the next contact are the same as information entered previously, select the contact entered previously from the Quickfill Contact Information box and then make the changes needed, such as changing the name. Click Save/Next to continue to the next contact.
4. Repeat step 4 for all contacts.

*The Account Summary page for the hospital displays when you finish creating the account.*

### Create the surgeon account:

1. Click Create/Manage Accounts > Create New Account > Surgeon.
2. Repeat steps 3 through 5 as in the hospital instructions above.

*The Account Summary page for the surgeon displays when you finish creating the account.*

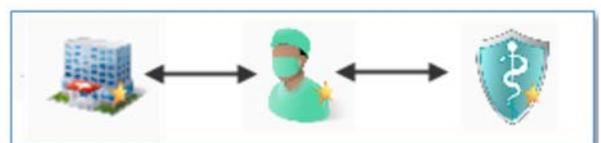
### Create the practice account:

1. Click Create/Manage Accounts > Create New Account > Practice.
2. Repeat steps 3 through 5 as in the hospital instructions above.

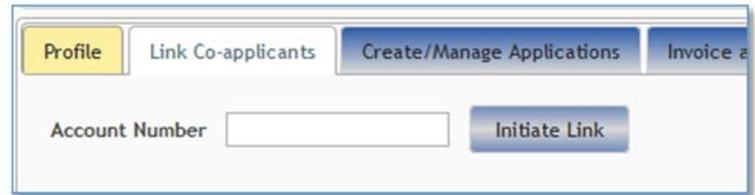
*The Account Summary page for the practice displays when you finish creating the account*

### Link the surgeon to the hospital and practice accounts:

Surgeons must link to a hospital and practice.  
Hospitals do not link to practices.



1. Click on "View Account Summary" to open the Surgeon account.
2. Click the Link Co-Applicants tab.

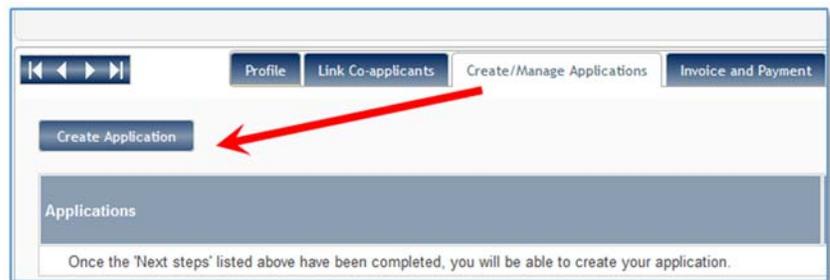


3. Enter the account Id for the co-applicant hospital (7 digits, begins with a 1) into the empty box, then click initiate link.
4. Click "Yes" if the information in the confirmation pop-up box is correct. If the information is incorrect, click "No" and enter the correct number.
5. Repeat steps 4 and 5 but this time enter account Id for the surgeon's practice (7 digits, begins with a 2)
6. Repeat for as many hospitals and practices the surgeon is going to be linked to.  
*You may also initiate a link from the hospital and practice accounts to the surgeon if desired.*

**Create the surgeon and/or hospital application and invoice:**

*(These steps are identical in both the hospital and surgeon accounts.)*

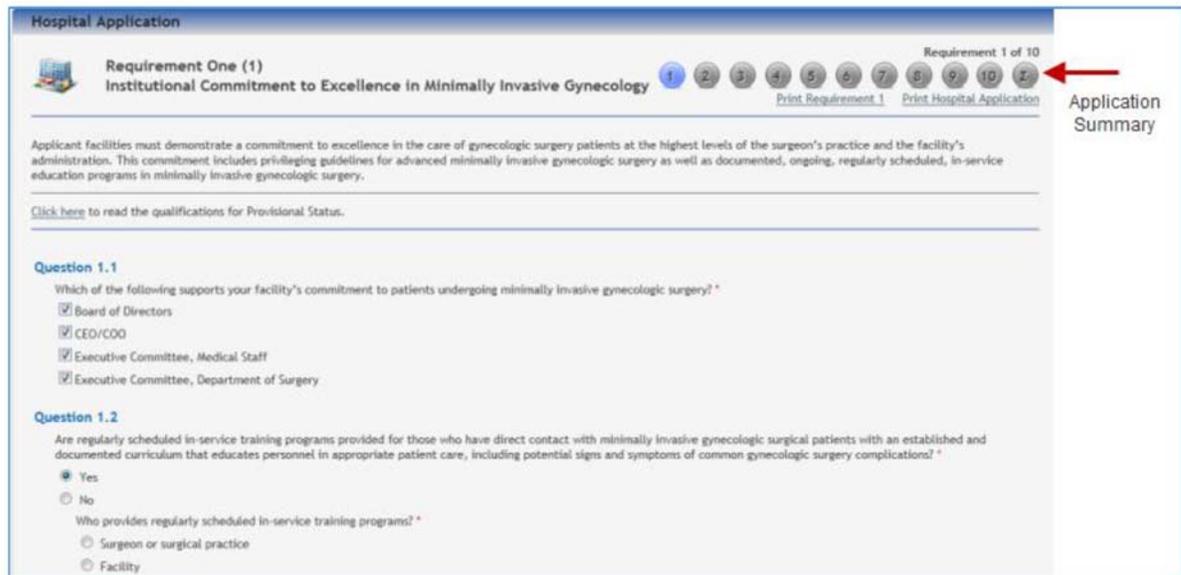
3. Click on View Account Summary on the account you wish to open.
4. Click the Create Manage Applications tab.
5. Click Create Application.



6. The system will automatically create and send the application fee invoice to the main and billing account contacts. The invoice can also be found under the invoice and payment tab. You may pay online from that tab by clicking Pay Now next to the open invoice.
7. The Terms and Conditions page displays.
8. Click Agree and enter your full name on the blank.
9. Click Save to proceed. You can click Decide Later and still proceed to the questionnaire, but you must agree to the Terms and Conditions before you can submit the application.
10. Beginning with Requirement One, answer each of the required questions. You must answer all of the required questions for each requirement before you can submit the application. You can skip pages and come back to them if you like but pages will not save unless all questions on that page are complete.

**Keep the following in mind as you work with the application questions:**

- There are several requirements, each with multiple questions.
- Depending on your answers, some questions may require more information.
- When you have answered all of the questions on a page, click Save/Next to go to the next requirement.
- You might not be able to finish the questionnaire in one session. You can leave a question unanswered and come back to it later, but you cannot submit the application until all questions have been answered.
- You can click Save/Exit to save your data and leave the questionnaire, but all questions on that page must be complete or none of the answers on that page will save.
- If you click Cancel, any data you entered on that page is lost.
- You can use the navigation buttons to access different pages of the questionnaire directly. If you have not saved your data on a page, you will be prompted to do so when you click the button for a different page.
- If you cannot answer all of the questions in one session, click Save/Exit. To continue later, go to the Account Summary page, click the Create/Manage Applications tab and click Edit.
- At any time, you can view the Application Summary page. The Application Summary page can help you find any missing elements.



When you have answered the questions for all requirements, completed all Next Steps, and paid the invoice, you can submit the application.

**To submit the application:**

1. Click View Account Summary on the surgeon account
2. Click the Create/Manage Applications tab
3. Click the edit icon to the right of the application
4. Click the Application Summary button
5. Click the Submit button