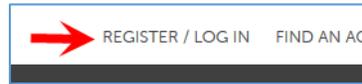


To share accounts with other users, you will need to get their username. If they do not have one yet, they will need to register as a user first, then you can share accounts with them. Instruct new users to follow the **CREATE A REGISTERED USER** directions below, then you will follow the **SHARE ACCOUNTS** directions.

CREATE A REGISTERED USER (new users)

1. Open a browser and go to the page <http://www.surgicalreview.org/>

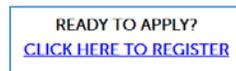
2. Click the orange "Register/Log In" link on the top right



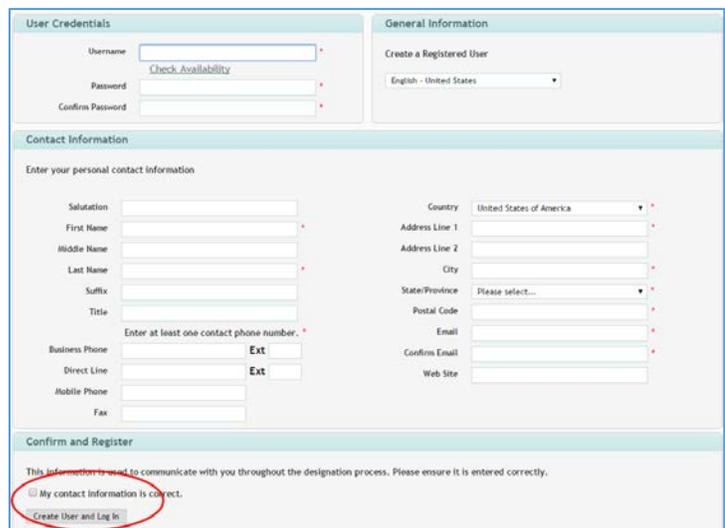
3. Select the program you are registering for:



4. This will take you to the program overview page. Click the "Click Here to Register" link in the middle of the page:



5. Fill in all information (required fields are noted with a red asterisk), review your information for accuracy and check the box "My contact information is correct," and click "Create User and Log In."



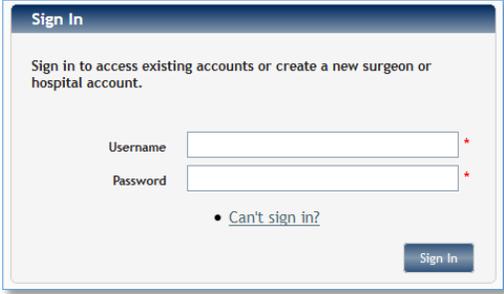
6. **STOP at that point. (Do not create new accounts)**

7. Email the account owner your username only - NOT your password. The account owner will share the account and instruct you to log out and log in.

SHARE ACCOUNTS (account owners)

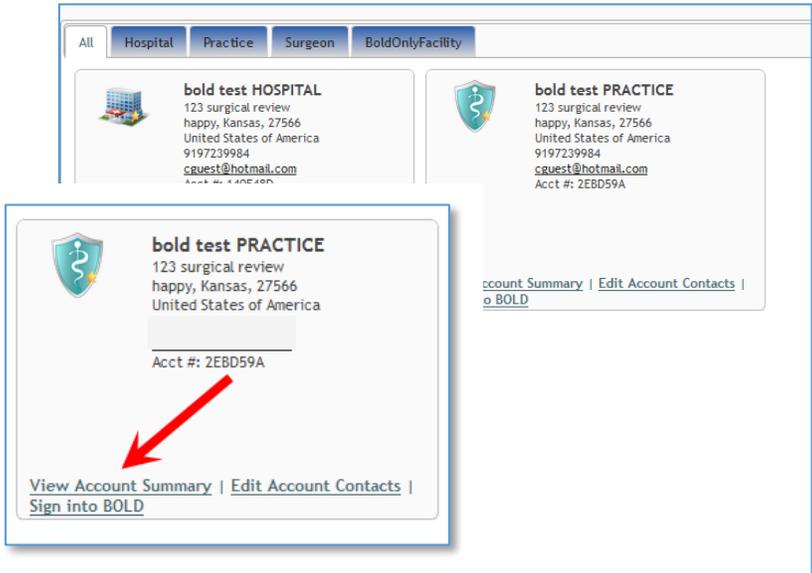
Log in to the SRC account management system:

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.



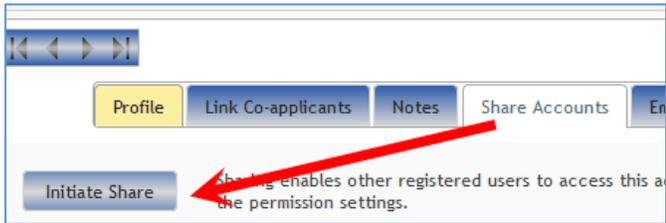
Select the account to share:

1. Select the account you wish to share with them and click "View Account Summary" to open it. (For BOLD access, you will select the PRACTICE account which begins with a 2)

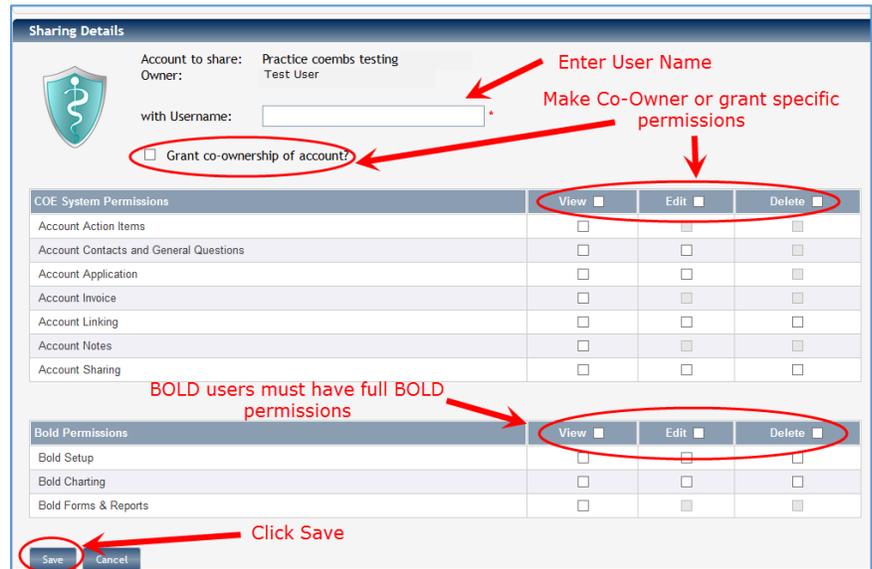


Share with the user and grant permissions:

1. Under the Share Account tab, click "Initiate Share".



- Enter the username (case sensitive), select the permissions you wish to give them, then click "Save". (For BOLD users, you must give them full view, edit delete permissions under the BOLD heading.)



Sharing Details

Account to share: Practice coembs testing
 Owner: Test User

with Username:

Grant co-ownership of account?

COE System Permissions	View	Edit	Delete
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"/>

BOLD users must have full BOLD permissions

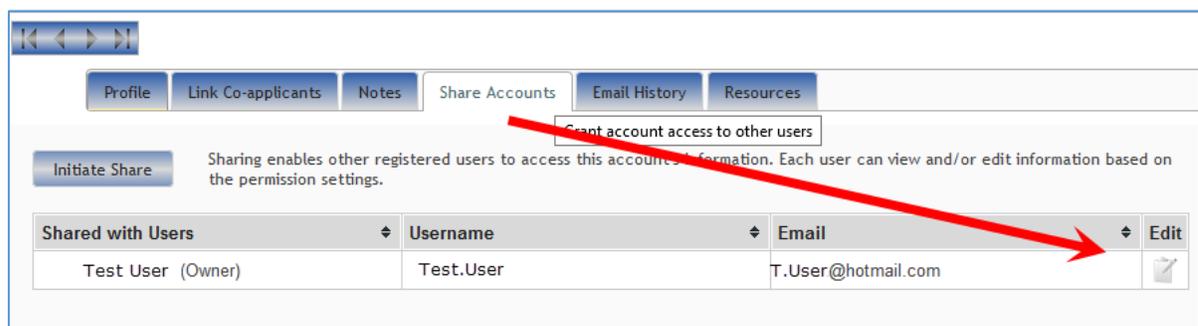
Bold Permissions	View	Edit	Delete
Bold Setup	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bold Charting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bold Forms & Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Cancel

- Repeat these steps if you have multiple accounts to share with the user.
- Tell the new user to log out and log back in. They should now see the account you just shared with them.
- When you are finished click "Cancel" to return to the Account Summary page or click the "Home" button on the top left to return to your Account Management page.

Edit permissions or remove users:

- You can edit permissions or delete users as well. Simply click the "Edit" button to the right of the username.



Profile Link Co-applicants Notes Share Accounts Email History Resources

Grant account access to other users

Initiate Share Sharing enables other registered users to access this account's information. Each user can view and/or edit information based on the permission settings.

Shared with Users	Username	Email	Edit
Test User (Owner)	Test.User	T.User@hotmail.com	

2. Either edit their permissions to change permissions or click "Remove" to completely remove the user then click "Save."

Edit Sharing Details for Account [redacted] to User [redacted]

Account to share: [redacted]
Owner: [redacted]
with Username: [redacted]

Grant co-ownership of account?

COE System Permissions	View <input checked="" type="checkbox"/>	Edit <input type="checkbox"/>	Delete <input type="checkbox"/>
Account Action Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Contacts and General Questions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Account Application	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Account Invoice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Linking	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Notes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Sharing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

3. When you are finished click "Cancel" to return to the Account Summary page or click the "Home" button on the top left to return to your Account Management page.