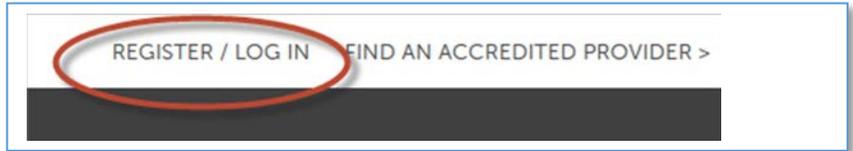


To share accounts with other users, you will need to get their username. If they do not have one yet, they will need to register as a user first, then you can share accounts with them. Instruct new users to follow the directions for **“CREATE A REGISTERED USER”** (pages 1-2), then you will follow the directions for **“SHARE ACCOUNTS”** (pages 3-5).

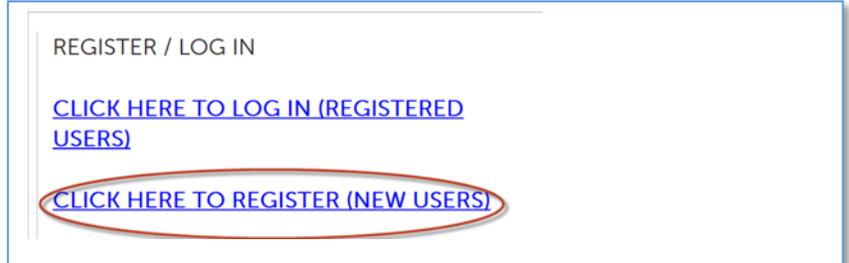
### CREATE A REGISTERED USER (new users)

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

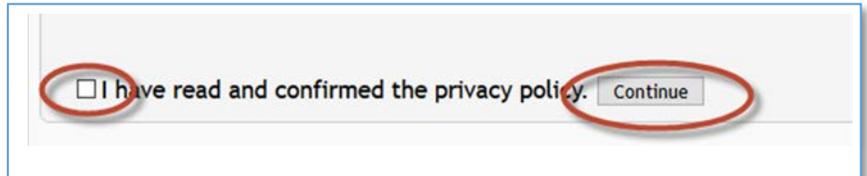
2. Click the link **“Register/Log In”** on the top right of the page



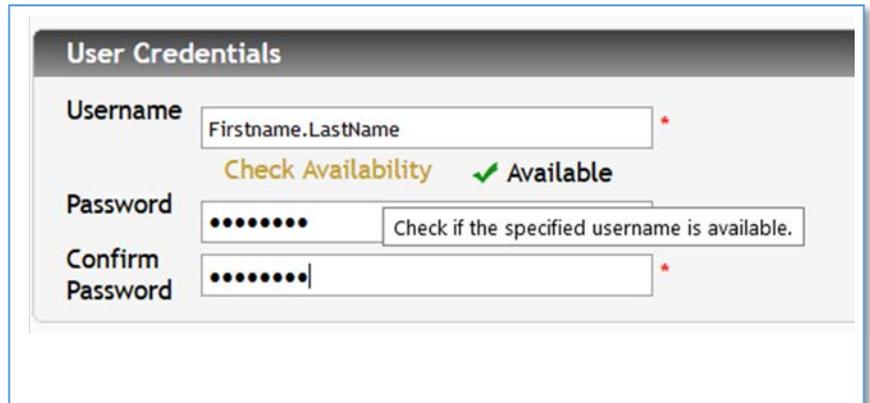
3. Click the link **“CLICK HERE TO REGISTER (NEW USERS)”**



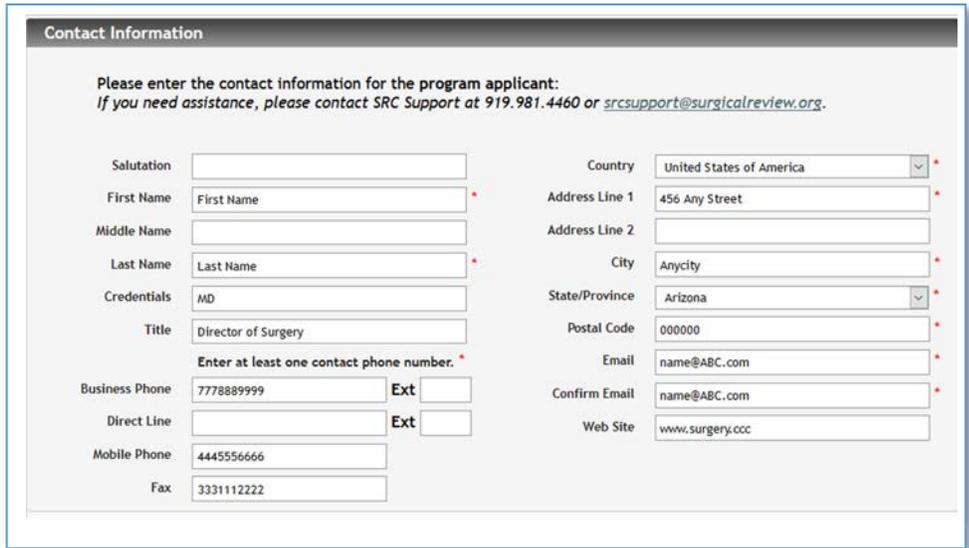
4. Read and scroll to the bottom of the Privacy Policy. **Check the box** and click **“Continue”** to indicate you have read it:



5. This will take you to “Create a Registered User.” In the **User Credentials** section, enter your desired username in the “Username” field and click Check Availability. If the name is available you may proceed, if it is not, you need to select another username. Once you have a valid username, enter your desired password in the “Password” field and enter it again in the “Confirm Password” field.



6. **Contact Information Section.** Fill in all information (required fields are noted with a red asterisk). Fill in as much as possible because you will be able to quick fill your account contacts using the information you've entered here.



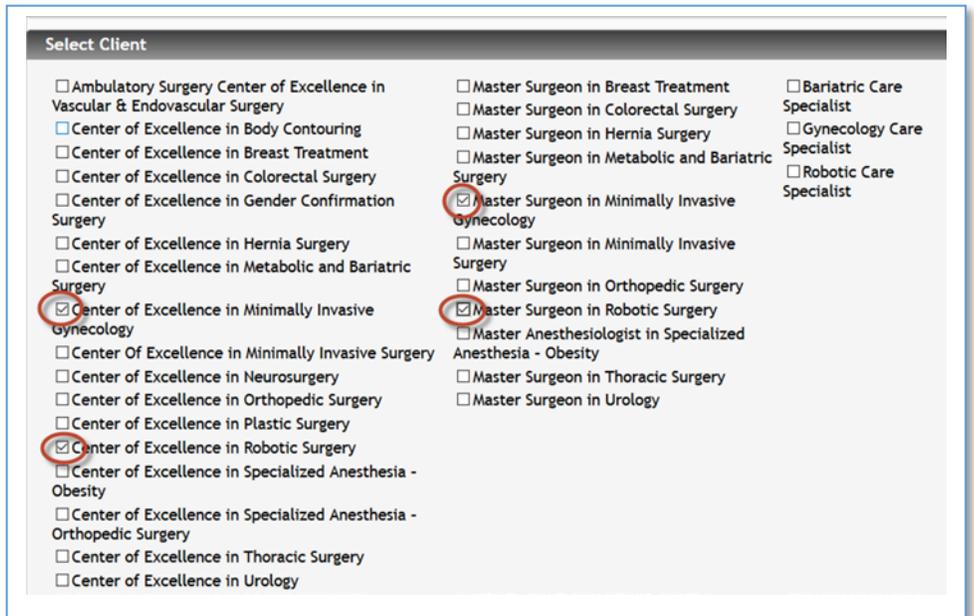
**Contact Information**

Please enter the contact information for the program applicant:  
If you need assistance, please contact SRC Support at 919.981.4460 or [srcsupport@surgicalreview.org](mailto:srcsupport@surgicalreview.org).

Salutation: [ ]  
 First Name: First Name \*  
 Middle Name: [ ]  
 Last Name: Last Name \*  
 Credentials: MD  
 Title: Director of Surgery  
 Business Phone: 7778889999 Ext: [ ]  
 Direct Line: [ ] Ext: [ ]  
 Mobile Phone: 4445556666  
 Fax: 3331112222

Country: United States of America \*  
 Address Line 1: 456 Any Street \*  
 Address Line 2: [ ]  
 City: Anycity \*  
 State/Province: Arizona \*  
 Postal Code: 000000 \*  
 Email: name@ABC.com \*  
 Confirm Email: name@ABC.com \*  
 Web Site: www.surgery.ccc

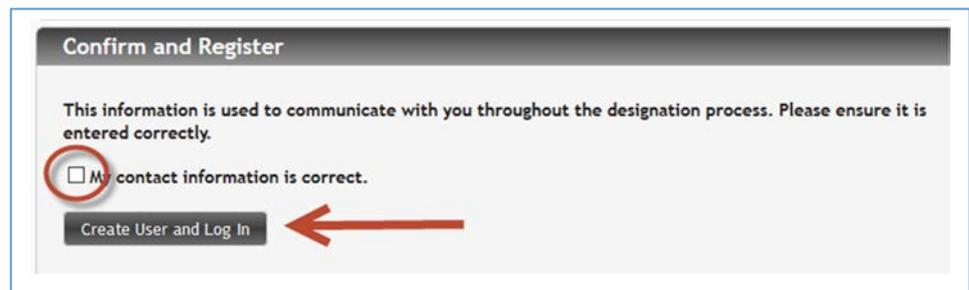
7. **Select Client Section.** In this section, select which Client (Program) you are applying to or need access to. You can select as many as apply. Note: Minimally Invasive Surgery is a different program than Minimally Invasive Gynecology. Be sure to double check which client(s) you need access to.



**Select Client**

- Ambulatory Surgery Center of Excellence in Vascular & Endovascular Surgery
- Center of Excellence in Body Contouring
- Center of Excellence in Breast Treatment
- Center of Excellence in Colorectal Surgery
- Center of Excellence in Gender Confirmation Surgery
- Center of Excellence in Hernia Surgery
- Center of Excellence in Metabolic and Bariatric Surgery
- Center of Excellence in Minimally Invasive Gynecology
- Center Of Excellence in Minimally Invasive Surgery
- Center of Excellence in Neurosurgery
- Center of Excellence in Orthopedic Surgery
- Center of Excellence in Plastic Surgery
- Center of Excellence in Robotic Surgery
- Center of Excellence in Specialized Anesthesia - Obesity
- Center of Excellence in Specialized Anesthesia - Orthopedic Surgery
- Center of Excellence in Thoracic Surgery
- Center of Excellence in Urology
- Master Surgeon in Breast Treatment
- Master Surgeon in Colorectal Surgery
- Master Surgeon in Hernia Surgery
- Master Surgeon in Metabolic and Bariatric Surgery
- Master Surgeon in Minimally Invasive Gynecology
- Master Surgeon in Minimally Invasive Surgery
- Master Surgeon in Orthopedic Surgery
- Master Surgeon in Robotic Surgery
- Master Anesthesiologist in Specialized Anesthesia - Obesity
- Master Surgeon in Thoracic Surgery
- Master Surgeon in Urology
- Bariatric Care Specialist
- Gynecology Care Specialist
- Robotic Care Specialist

8. **Confirm and Register Section.** Review your information for accuracy and check the box "My contact information is correct," and click "Create User and Log In."



**Confirm and Register**

This information is used to communicate with you throughout the designation process. Please ensure it is entered correctly.

My contact information is correct.

Create User and Log In

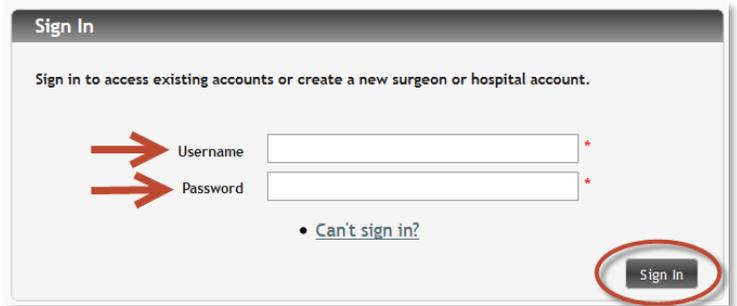
9. **STOP at this point. (Do not create new accounts)**

10. 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)

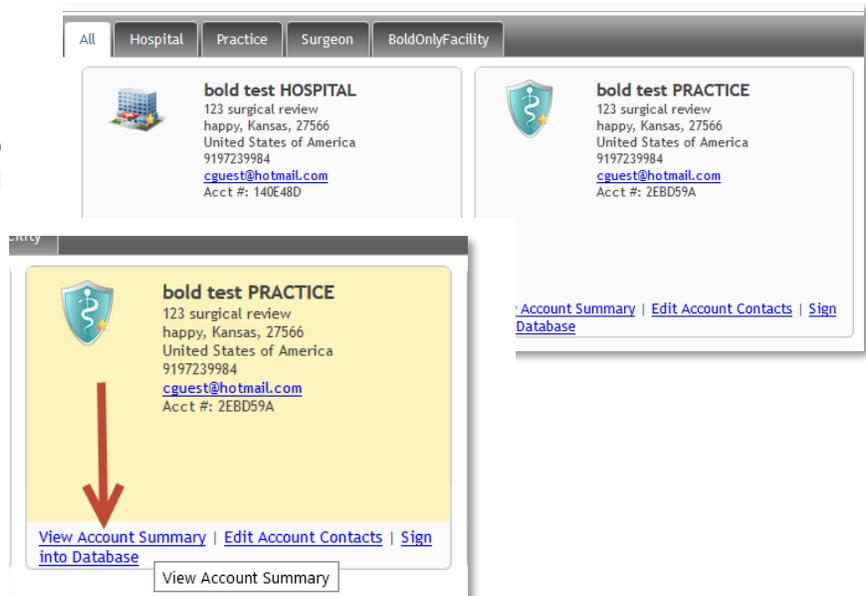
#### Log in to the SRC account management system:

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



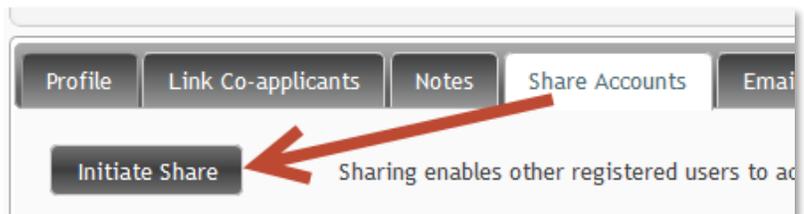
#### Select the account to share:

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)

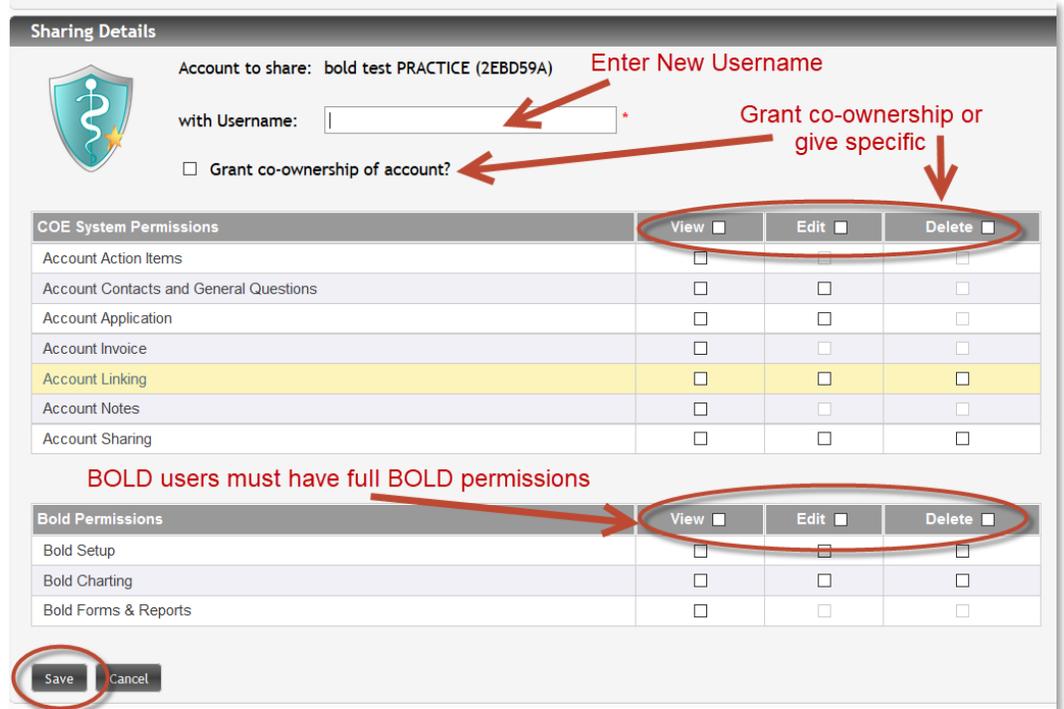


#### Share with the user and grant permissions:

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



2. Enter the new username, 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: bold test PRACTICE (2EBD59A) **Enter New Username**

with Username:

Grant co-ownership of account? **Grant co-ownership or give specific**

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"/>

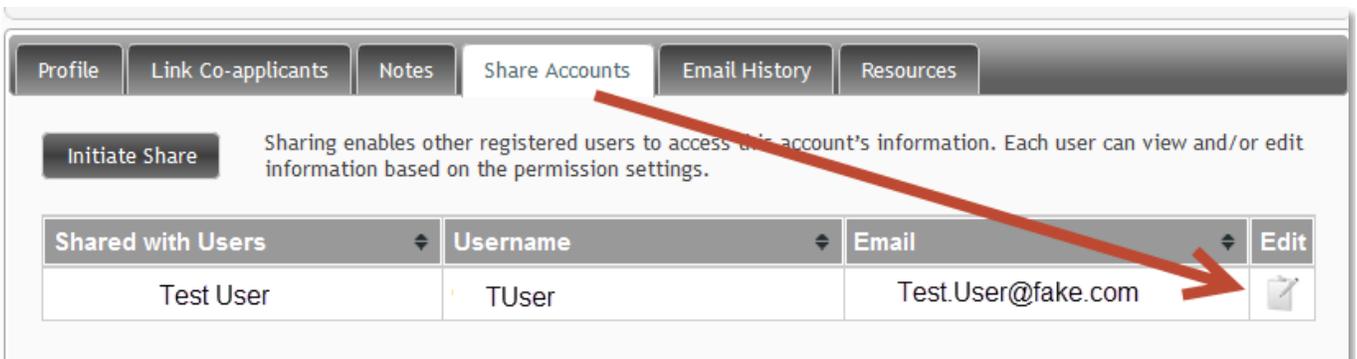
**BOLD users must have full BOLD permissions**

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"/>

3. Repeat these steps if you have multiple accounts to share with the user.
4. Tell the new user to log out and log back in. They should now see the account you just shared with them.
5. 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:**

1. 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

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	TUser	Test.User@fake.com	<input type="button" value="Edit"/>

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

**Edit Sharing Details for Account** [Account ID]



Remove

Account to share: [Account Name]

Owner: [Owner Name]

with Username: [Username]

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"/>

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

Save

Cancel

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.