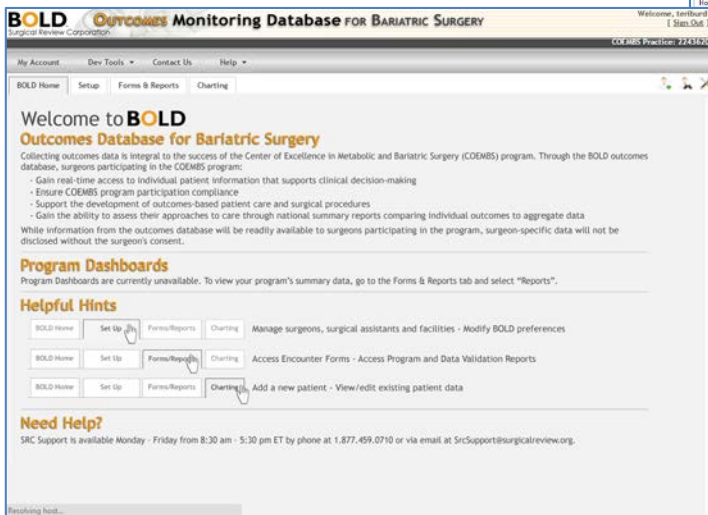
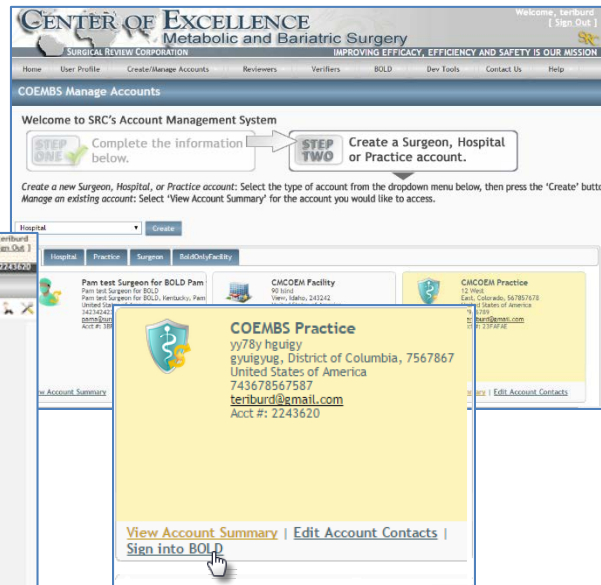
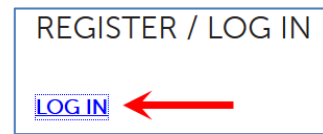
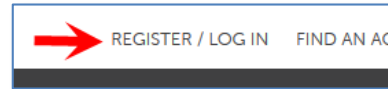


Accessing the BOLD Database

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.*



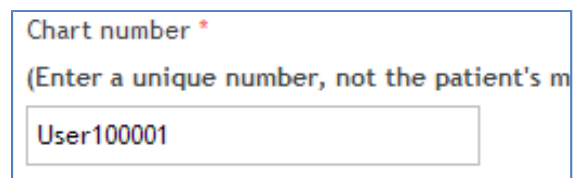
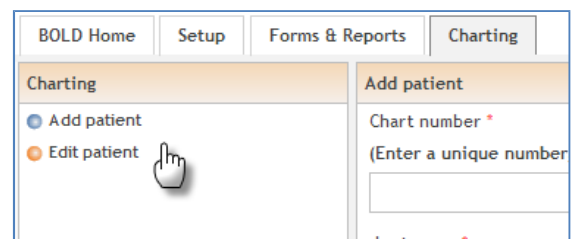
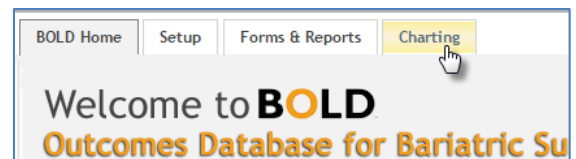
Navigating the BOLD Database



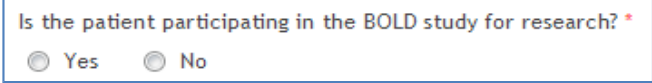
- A. **My Account:** takes you to the *Manage Accounts* page in the account management system
- B. **BOLD Home:** returns you to the *Welcome to BOLD* page
- C. **Setup:** where you go to enter/view/edit surgeon, surgical assistant and facility information and set your preferences for units of measure,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

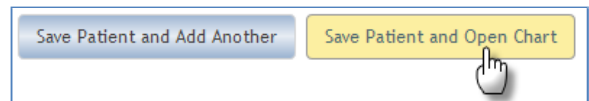
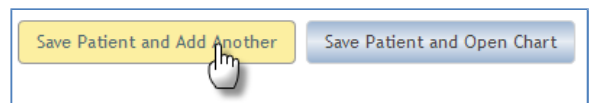


- **Year of birth:** only the birth year is entered to limit the private health information requested while maintaining the ability to evaluate patients by age
- **Race:** the categories displayed are a preference specified on the Setup tab
- **Patient Residence:** the Country dropdown menu defaults 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 bariatric 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

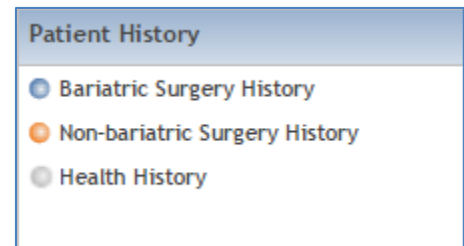


Navigating the Patient Record

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 Bariatric Surgery History, Non-bariatric Surgery History and Health History. The color of the circle to the left of the menu item indicates its status:

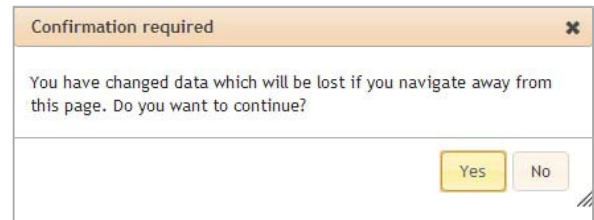


- Completed page
- Current page
- Incomplete page

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.

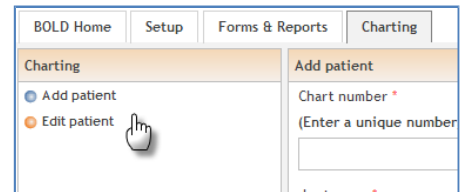


Clicking **Yes** enables you to leave the page without saving your changes; clicking **No** returns you to the current page where you can click **Next** to save your changes and proceed.

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

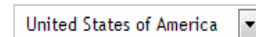
Additional Information and Helpful Tools

Data Entry Options

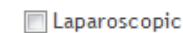
1. Radio button: allows a single selection from the items listed



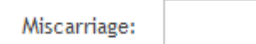
2. Dropdown menu: allows a single selection from the items in the list



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 Bariatric Surgery History page of the History tab, BOLD asks, “Has the patient had any previous bariatric 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 Pre-discharge Complications as an example, for each complication, BOLD displays the date and complication as a table row. A new row will appear in the table after the data required for each complication 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.

Complication Date	Complication	Remove
07/25/2013	Infection, surgical site	

Intervention Date	Intervention	Surgeon	Remove
07/25/2013	Drain, abscess	35D5404	

Did the patient experience any complications after surgery and prior to discharge? *

Yes
 No

Pre-discharge complication *

Complication date *

Search by
 Category Complication name Name and definition

Search mode
 Contains Starts with

Search text

Search Functions


Complications also 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 complication by category, complication name or name and definition. To search for ‘Injury of esophagus’ by Complication name:

1. Click on the **Complication name** button
2. In the Search text box, type in the first few letters (at least three) of the complication name, then select the Search mode

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

3. Click **Search**

Pre-discharge complication *

Complication date *
 


Search by
 Category Complication name Name and definition

Search mode
 Contains Starts with

Search text

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

Pre-discharge complication *

Complication date *
 

Search by
 Category Complication name Name and definition

Search mode
 Contains Starts with

Search text

Complication name	Definition
Anoxic brain injury	Neurological: Diffuse brain injury resulting from severe lack of oxygen to the brain; does not include stroke/CVA in which injury is localized.
Injury of esophagus	Surgical: Injury to the esophagus by any mechanism including placement of the nasogastric tube or from the esophageal placement of the anvil of the stapler.
Nerve injury	Neurological: Injury causing damage to a nerve.

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.

