SURGIMATE on schedule.

Surgimate Practice – Quick Start User Guide

CONTENTS

1. LOGIN

How to Log in to Surgimate Practice

1. Open a Google Chrome browser and navigate to the following URL: "**app.surgimate.com".**
   Please bookmark this URL for future access to the Surgimate login webpage. On the login
   webpage, please enter your account credentials as follows:

Enter your email address (in lowercase only) and password (case-sensitive).

LOGIN TO SURGIMATE

Email Address

Password

LOGIN

☐ Remember Me   Reset Password

How to Generate a New/Reset Password Link

2. If you do not have a password, or if you are logging in for the first time – incorporate this
   step

To reset a user's password, click on **Reset Password** and
enter the user email address. Surgimate will generate a
reset/new password link which will be sent to the user's
email address.

FORGOT PASSWORD

Your password has been reset. Please check your
email and click the reset link that was sent to you.

How to Update your Password in Surgimate

Navigate to the "Account" tab which can be found on the upper right-hand side of the screen when you click on the arrow next to your username. Enter a new password that matches the required criteria, and then click "Update".

WELCOME,   SURGIMATE ⌄

ACCOUNT

LOG OUT

ACCOUNT DETAILS

EMAIL ADDRESS

@surgimate.com

FIRST NAME

John

LAST NAME

Test

PASSWORD

•••••••••••

CONFIRM PASSWORD

•••••••••

- ✅ **Length › 8**
- ✅ **At least one number**
- ✅ **At least one lowercase letter**
- ✅ **At least one uppercase letter**
- ✅ **At least one special character (!,%,&,@,#,$,^,*,?,_,~)**
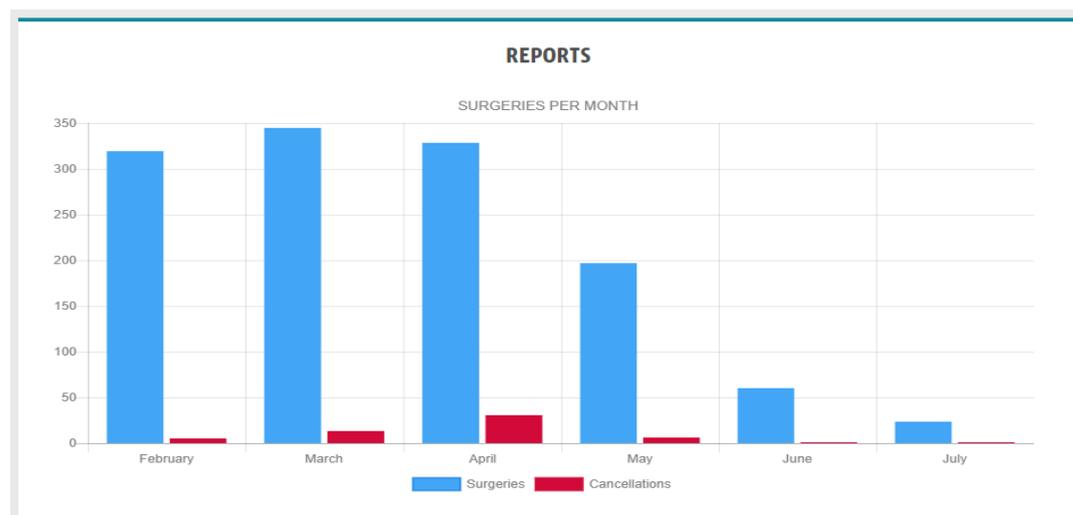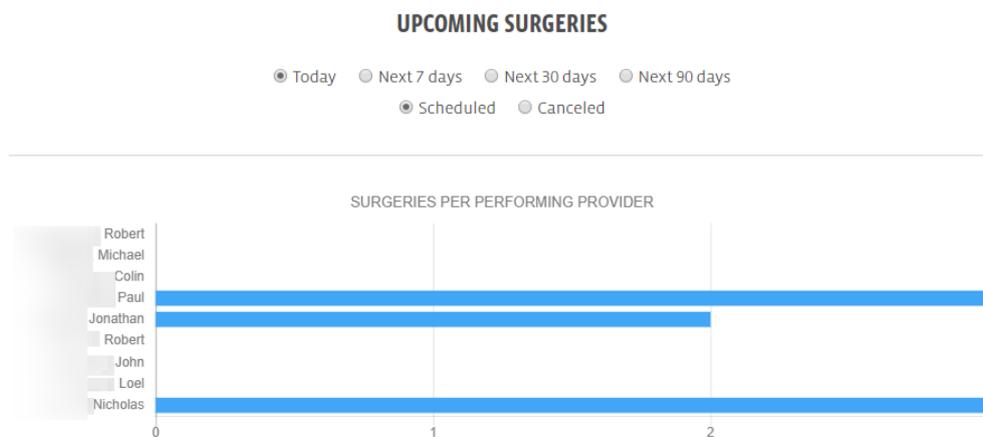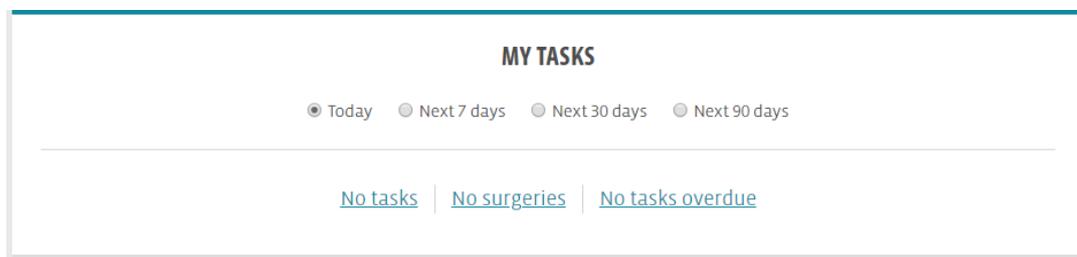- **Confirm Matches**

UPDATE

Action Item:

Got to **app.surgimate.com**, generate a password link to be sent to your email and then login in to Surgimate and update your password.

2. BASIC NAVIGATION

Home

The Surgimate Practice Home screen displays data specific to each user and each practice. The Home screen features graphical reports regarding the practice's surgical volume, cancellations and more.

Users can view their upcoming tasks, surgeries by performing providers, surgeries by facility or reports for various time frames.

MY TASKS

◉ Today   ○ Next 7 days   ○ Next 30 days   ○ Next 90 days

No tasks | No surgeries | No tasks overdue

UPCOMING SURGERIES

◉ Today   ○ Next 7 days   ○ Next 30 days   ○ Next 90 days
◉ Scheduled   ○ Canceled

SURGERIES PER PERFORMING PROVIDER

REPORTS

SURGERIES PER MONTH

Navigation Bar (Tabs)

Admin – The Surgimate Admin Tab is available for specific administrator user accounts. A practice's designated Surgimate administrator can edit or deactivate existing user accounts. Please note, new user accounts will need to be configured by a Surgimate support technician.

Reports – The Reports Tab is where users can easily run basic reports which provide actionable information such as upcoming surgeries for a specific provider, upcoming surgeries at a specific location, cancelled surgeries, and more. There is also an additional layer of user data available (e.g. number of forms generated per month, number of user logins, etc). For Administrators interested in accessing these additional reports, please contact: support@surgimate.com.

Agenda - The Surgimate Practice Agenda is designed to display users' Tasks in a clear and organized way. Users can view their own tasks, as well as, tasks assigned to other team members.

Overview - The Surgimate Practice Overview is where users can view large sets of data and create relevant reports. Users can also manage Surgeon Templates from this tab.

Calendar - The Surgimate Practice Calendar displays all scheduled surgical appointments. Appointments are color coordinated based on the performing provider.

Surgeries – The Surgeries tab displays recently viewed surgical records for various time frames.

Patients - The Patients tab displays recently viewed patient charts for various time frames.

Quick Search Bar – The Surgimate Practice Quick Search Bar is designed for quick and easy access to surgical records and patient charts. Users can conduct a search using a PID number, Date of Birth, or by entering the patient's First or Last name.

3. SUPPORT SITE

How to Reach the Support Site

The Support Site can be accessed by clicking on "Support" on the upper right-hand side of the screen. Alternatively, the user can navigate to the following URL to access the support site: www.esrm-support.com
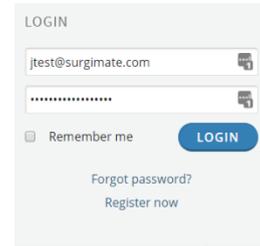
How to Create an Account on the Support Site

1. Click "Register Now"

2. Fill in name, email and create a password

3. Click "Sign Up/Register"

4. An email will be sent to the email address provided. Click on the link to activate the profile

How to Submit a Support Ticket

1. Login using your username and password

2. Click on "Submit a Ticket"

3. Follow the prompts and explain the issue/request. The description should be comprehensive and include attachments (if applicable) of:

      a) A copy of the form(s) with the relevant fields circled.

      b) Relevant screenshots / error messages. If an error message is included, please send the "Details" of the message (by clicking on "Details")

4. You will receive an automated response confirming Surgimate's receipt of your ticket, including a ticket reference number

5. A Surgimate representative will send you a follow-up email regarding the status of your request

6. You can track the progress of your request(s) by clicking "View Tickets"

7. To respond to an open ticket, select the relevant ticket from "View Tickets". Please DO NOT submit a new ticket

Support Submission Guidelines

The following guidelines must be followed for relevant requests:

Bug/Error: Please provide the exact scenario, including all steps and/or relevant screenshots / error messages versus the desired outcome

Form: Please specify the exact form you are referring to, including the relevant Hospital/Category it is linked to. Then, either:

- The relevant field should be identified. The problem should be explained, along with the desired outcome

- If a change needs to be made to a certain field, it should be clearly identified and explained

- If an additional field needs to be added, it should be clearly identified and explained

Printing Issue: Please provide the exact scenario, including all steps and/or relevant screenshots / error messages. If a specific form is causing issues, this form should be identified

Feature Request: Please be as specific as possible regarding the details of the feature

Suggestion: Surgimate is open to all of your suggestions (big or small!)

Action Item:

Got to www.esrm-support.com and Sign Up/Register" for a support site account