

**MBSAQIP**

# **CONTACT MANAGEMENT GUIDE**

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**A STEP BY STEP GUIDE ON HOW  
TO MANAGE CONTACT  
INFORMATION AND REQUEST  
DATA ACCESS FOR INDIVIDUALS  
AT YOUR CENTER.**

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[WWW.MBSAQIP.ORG](http://WWW.MBSAQIP.ORG)

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# CONTACT MANAGEMENT OVERVIEW

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# CONTACT MANAGEMENT OVERVIEW

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## THE QUALITY PORTAL

ACS Quality Program participants utilize the [ACS Quality Portal](#) to schedule site visits, review invoices, access PRQs, view resources, and manage their program contacts.

Participating MBSAQIP Centers are required to manage their bariatric program contacts via the [ACS Quality Portal](#), including both administrative site contacts and data platform contacts.

The MBSAQIP provides individuals participating the MBSAQIP access to the ACS Quality Portal through use of a username and password. This username and password is unique to each individual and should not be shared under any circumstances. If for any reason a username or password is forgotten, one may request this information or reset their password by utilizing the forgot username or forgot password links on the login page.

The image shows a screenshot of the ACS Quality Portal's sign-in interface. At the top, the ACS American College of Surgeons logo is displayed. Below the logo, the text "Sign In" is centered. There are two input fields: "Username" with the text "TEST" entered, and "Password" with four dots representing masked characters and a toggle icon on the right. Below the password field is a checkbox labeled "Keep me signed in". A dark blue "Sign in" button is positioned below the checkbox. At the bottom of the form, there are four links: "Forgot password?", "Forgot username?", "Help", and "New User?".

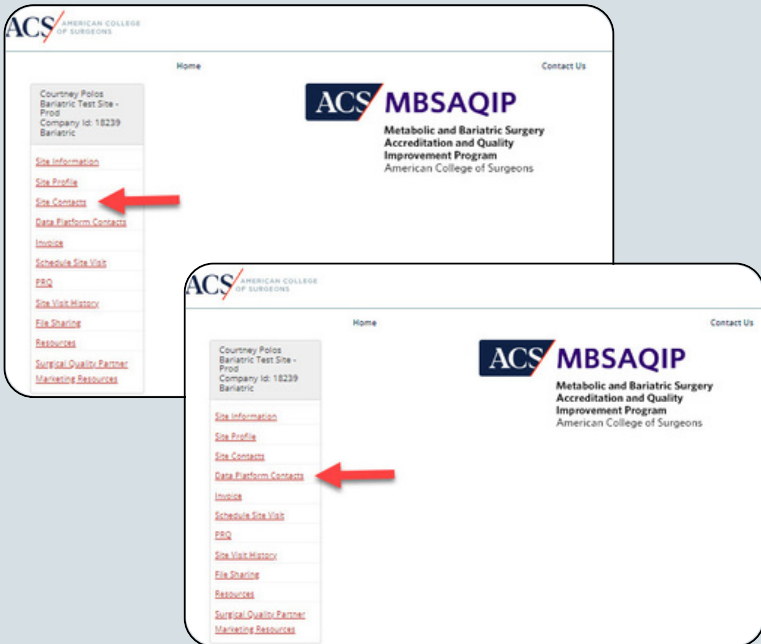
# CONTACT MANAGEMENT OVERVIEW

## PRIMARY CONTACT VS. DATA PLATFORM MANAGER

Individuals with access to the ACS Quality Portal are assigned specific roles appointed by their center. These roles determine the specific functions they can perform within the portal. There are two additional roles that come with distinct and important responsibilities. Persons **MUST** have an MBS role assigned (MBS Coordinator, Bariatric (Other), etc.) in order to have the additional role of Primary Contact or Billing Contact assigned.

The first is the MBSAQIP Primary Contact. This individual is the only one with the authority to manage administrative contacts through the Site Contacts Tab, as well as data platform contacts via the Data Platform Contacts Tab. It's important to note that only one person can be assigned to the MBSAQIP Primary Contact role. The MBS Coordinator generally serves as the MBSAQIP Primary Contact, and MBSAQIP strongly recommends this arrangement. Please note that the MBS Director should only assume the role of primary contact if absolutely necessary.

The second role is the MBSAQIP Data Platform Manager. Individuals in this role are responsible for managing contacts with data platform access (QI Users and Pending MBSCRs), exclusively through the Data Platform Contacts Tab. Unlike the Primary Contact role, there can be multiple MBSAQIP Data Platform Managers. Additionally, the MBSAQIP Primary Contact can also serve as the Data Platform Manager if necessary.



# CONTACT MANAGEMENT OVERVIEW

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## SITE CONTACTS & DATA PLATFORM CONTACTS

The tables below provides a list of all administrative site contacts along with a brief description of their role and responsibilities.

<b><u>Administrative Contact</u></b>	<b><u>Description</u></b>
Primary Contact (Additional Role)	Individual accountable for MBSAQIP participation and receives all communications from MBSAQIP. This is the only individual that can add, edit and remove site contacts as well as data platform contacts. Only one individual can hold this role.
Billing Contact (Additional Role)	Individual selected to receive MBSAQIP invoices and communications regarding invoicing. Only one individual can hold this role.
Data Platform Manager (MBSAQIP)	Individual(s) selected to manage data platform access for the participating MBSAQIP center. Multiple individuals can hold this role. Note that this individual DOES NOT have access to the registry, as the main function of this role is to assign Data Registry access for a center's contacts.
MBS Director	Individual selected to lead the bariatric program at your center. A single individual must hold this role.
MBS Coordinator	A licensed or registered healthcare professional selected to assist with running the bariatric program. More than one individual may hold this role, however only a single individual is allowed to serve as the liaison (Primary Contact) between the center and MBSAQIP. This individual may also serve as the MBSCR, however they are prohibited from documenting in patient charts.
Pending Verified Surgeon / Verified Surgeon	All MBS surgeons at a center are eligible but not required to seek surgeon verification. The MBS Director MUST be a verified surgeon. Surgeons seeking verification must be assigned the pending verified surgeon role. All surgeons that meet criteria will receive the role of "Verified Surgeon" post site visit.
Facility Chief Administrator	Executive who supervises the daily operations of the center (i.e., CEO, CFO, COO, Chief of Surgery, etc.)
Obesity Medicine Director	A credentialed physician practicing in the field of obesity medicine selected to lead all obesity medicine services provided at the center. A single individual must hold this role. The MBS Director may hold this role, provided that all requirements in Standards 2.5 & 2.8 are met.
Marketing Contact	Individual that is responsible for the marketing of your center, including the bariatric program.
QI Collaborative Contact	Individual that is able to access and contribute to ACS Collaborative resources and education.
Other (Bariatric)	Individual that would like to be able to view the Quality Portal to monitor accreditation workflow, upload documentation, etc.,.

# CONTACT MANAGEMENT OVERVIEW

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## SITE CONTACTS & DATA PLATFORM CONTACTS

The tables below provides a list of all data platform contacts along with a brief description of their role and responsibilities.

<u>Data Platform Contact</u>	<u>Description</u>
MBS QI User	An individual selected to receive read only access to the MBSAQIP Data Registry for a center. Once the role is assigned, MBSAQIPACCESS@FACS.ORG must be notified in order for their access to be granted. The individual will then receive their login information via email from ACSTECHSUPPORT@IQVIA.COM.
Pending MBSCR	An individual selected to receive full access to the MBSAQIP Data Registry for data abstraction. The selected MBSCR must not provide direct patient care and must be allowed full, unrestricted access to the centers EMR. Once the role is assigned, MBSAQIPACCESS@FACS.ORG must be notified in order for their access to be granted. Additional steps may be required, such as training or recertification prior to the individual receiving their login information via email from ACSTECHSUPPORT@IQVIA.COM.
MBS Data Abstractor	An individual that has been granted full access for data abstraction from the MBSAQIP data registry. This role is assigned exclusively by MBSAQIP upon the completion of all necessary training or recertification.

# CONTACT MANAGEMENT OVERVIEW

## WHO TO CONTACT FOR SUPPORT

Please review the table below for directions on who to contact based on the issue encountered.

Topic	Team	Contact Information
<ul style="list-style-type: none"> <li>MBSAQIP variables, definitions, occurrences, events</li> <li>Case Collection &amp; Case-specific Questions</li> <li>MBSAQIP Reports</li> <li>MBSCR Education &amp; Exams</li> </ul>	Clinical Support	Clinicalsupport@mbsaqip.org
<ul style="list-style-type: none"> <li>MBSAQIP Standards</li> <li>Accreditation (including PRQs, ADTs, ACRs, etc.)</li> <li>Site Visits</li> </ul>	Your Assigned Program Coordinator Or MBSAQIP Standards & Accreditation	Assigned Program Coordinator email OR MBSAQIP@facs.org
<ul style="list-style-type: none"> <li>Site Contacts</li> <li>Quality Portal access issues</li> <li>Data Platform Contacts</li> <li>New MBSCR registration</li> <li>MBSCR training modules</li> <li>Data registry access</li> </ul>	MBSAQIP Access	MBSAQIPAccess@facs.org
<ul style="list-style-type: none"> <li>National quality improvement projects (i.e., BSTOP-D)</li> </ul>	MBSAQIP Quality	MBSAQIPQuality@facs.org
<ul style="list-style-type: none"> <li>Technical issues involving any item in the <b>Resource Portal only</b> (i.e., SAR, Patient Details &amp; Custom Fields Report, Monthly Education Questions, etc.)</li> <li>Data Platform Contacts Technical Issues</li> </ul>	NSQIP IT Support	NSQIPTech@facs.org
<ul style="list-style-type: none"> <li>Technical issues involving all other items in the data registry</li> <li>Data registry login and password reset</li> <li>Locked Data Change Requests (LDCR)</li> </ul>	ACS Tech Support	ACStechsupport@iqvia.com



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# SITE CONTACT MANAGEMENT

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# SITE CONTACT MANAGEMENT

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## CONTACTS, ROLES, AND PERMISSIONS

The table below provides an overview of the administrative roles and the functions they are allowed to perform in the ACS Quality Portal.

<b><u>Administrative Contact</u></b>	<b><u>Edit Site Profile</u></b>	<b><u>Add, Edit or Remove Site Contacts</u></b>	<b><u>Add, Edit or Remove Data Platform Contacts</u></b>	<b><u>Edit &amp; Submit a PRQ</u></b>	<b><u>Edit &amp; Submit Site Visit Dates</u></b>	<b><u>Access to SQP Store &amp; Marketing Materials</u></b>
Primary Contact	✓	✓	✓	✓	✓	✓
Billing Contact	NO	NO	NO	NO	NO	NO
Data Platform Manager (MBSAQIP)	NO	NO	✓	NO	NO	NO
MBS Director	✓	NO	NO	✓	✓	NO
MBS Coordinator	✓	NO	NO	✓	✓	NO
Pending Verified Surgeon / Verified Surgeon	✓	NO	NO	✓	✓	NO
Facility Chief Administrator	✓	NO	NO	✓	✓	NO
Obesity Medicine Director	NO	NO	NO	NO	NO	NO
Marketing Contact	NO	NO	NO	NO	NO	✓
QI Collaborative Contact	NO	NO	NO	NO	NO	NO
Other (Bariatric)	✓	NO	NO	✓	✓	NO

# DATA PLATFORM CONTACT MANAGEMENT

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## MBSAQIP PRIMARY CONTACT REQUIREMENTS

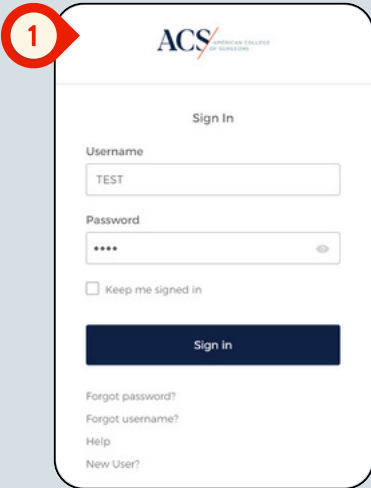
- Each MBSAQIP participating center will have one individual assigned as the Primary Contact.
- An individual may serve as the Primary Contact at more than one site.
- The Primary Contact must not share their login information, and must keep this information secure.
- The Primary Contact will handle requests for new administrative site contacts, deactivations, reactivations, password resets, and updates to user information at their site in a timely manner.
- The Primary Contact will deactivate user accounts for individuals that leave their site or their role in the program(s) in a timely manner.

# SITE CONTACT MANAGEMENT

## HOW TO ADD A NEW CONTACT

To add a site contact the individual selected as the Primary Contact will need to follow the instructions below:

1. Log into the ACS Quality Portal & Select the center for which you need to add a new contact to.
2. Select **Site Contacts**
3. Select **Add New Contact** from the bottom of the screen
4. A new pop up window will appear. At the top of window, there will be a drop down from which you will need to select the role the new contact will be assigned.
5. Once the role is selected, complete filling out all of the required contacts information and select **Save**. If you do not select save and only select close, the information will not be saved and you will have to start over.
6. Your new added contact will then appear in the site contacts tab with a status of **Pending**. MBSAQIP must review and approve all contacts prior to granting access to the Quality Portal.
7. You may repeat steps 1 - 5 above to continue adding administrative site contacts for your center.



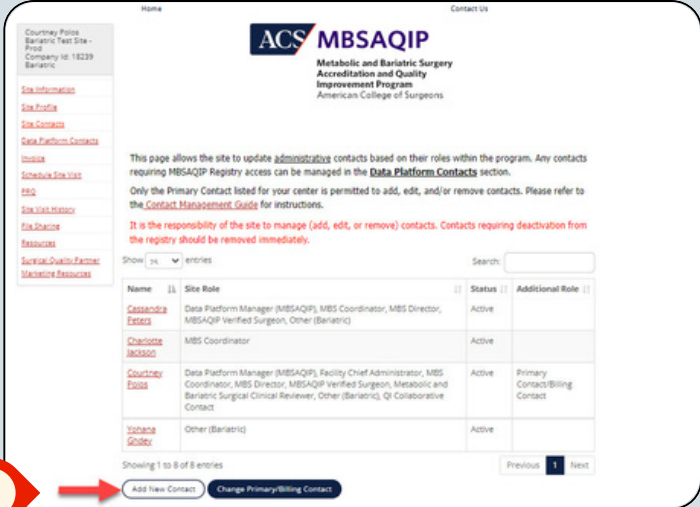
The screenshot shows the ACS American College of Surgeons sign-in page. At the top left, there is a red callout bubble with the number '1'. Below the ACS logo, the text 'Sign In' is centered. There are two input fields: 'Username' containing 'TEST' and 'Password' containing four asterisks. Below the password field is a checkbox labeled 'Keep me signed in'. A dark blue button labeled 'Sign in' is positioned below the checkbox. At the bottom of the page, there are four links: 'Forgot password?', 'Forgot username?', 'Help', and 'New User?'.



The screenshot shows the ACS 'Select Site to Manage' page. At the top left, there is a red callout bubble with the number '1'. The page header includes the ACS logo, 'Home', and 'Contact Us'. Below the header, there is a 'Courtnay Polio' button. The main heading is 'Select Site to Manage'. Underneath, there is a 'Program: MBSAQIP' label and a dropdown menu. The dropdown menu is open, showing a red-bordered button labeled 'Manage Test Site - Prod'.

# SITE CONTACT MANAGEMENT

## HOW TO ADD A NEW CONTACT




# SITE CONTACT MANAGEMENT

## HOW TO ADD A NEW CONTACT


**4**

Close

• Role:  

- First Name:
- Last Name:
- Title:
- Address:
- Country:
- City:
- State:
- Zip Code:
- Email:
- Phone:   Ext:

(Country Codes/area Codes/Numbers)

**5**  Save

Close

This page allows the site to update administrative contacts based on their roles within the program. Any contacts requiring MBSAQIP Registry access can be managed in the Data Platform Contacts section.

Only the Primary Contact listed for your center is permitted to add, edit, and/or remove contacts. Please refer to the Contact Management Guide for instructions.

**It is the responsibility of the site to manage (add, edit, or remove) contacts. Contacts requiring deactivation from the registry should be removed immediately.**

Show: 24 entries Search:

Name	Site Role	Status	Additional Role
<a href="#">Cassandra Esters</a>	Data Platform Manager (MBSAQIP), MBS Coordinator, MBS Director, MBSAQIP Verified Surgeon, Other (Bariatric)	Active	
<a href="#">Charlotte Jackson</a>	MBS Coordinator	Active	
<a href="#">Courtney Poole</a>	MBS Coordinator, Other (Bariatric)	Active	Primary Contact
<a href="#">Semberly Evans Labbo</a>	MBSAQIP Verified Surgeon	Active	
<a href="#">Lisa Hale</a>	Pending Verified Surgeon	Pending	
<a href="#">Lilaya Gocozales</a>	Other (Bariatric)	Active	
<a href="#">Yahana Ghdey</a>	Other (Bariatric)	Active	

Showing 1 to 11 of 11 entries

Previous **1** Next

[Add New Contact](#) [Change Primary/Billing Contact](#)

**6**

# SITE CONTACT MANAGEMENT

## MBSAQIP PENDING STATUS & ROLES

When adding a new site contact, you may notice that the status column will read “pending.” This is because MBSAQIP staff must review and approve all contacts entered into the ACS Quality Portal for security purposes. Pending contacts are typically processed within 1 - 2 business days. However, if it is urgent that a contact be processed, center’s may reach out to [MBSAQIPaccess@facs.org](mailto:MBSAQIPaccess@facs.org). Once the contact is processed, the status will change in the Quality Portal to “active.” This lets you know that MBSAQIP staff have reviewed the contact and login information has been provided.

Certain MBSAQIP roles are titled as “pending”, such as the role of Pending Verified Surgeon. The MBSAQIP will verify surgeons seeking verification during site visit. Surgeons who meet criteria for verification at site visit will be updated by MBSAQIP staff to the MBSAQIP Verified Surgeon role.

**ACS MBSAQIP**  
Metabolic and Bariatric Surgery  
Accreditation and Quality  
Improvement Program  
American College of Surgeons

This page allows the site to update [administrative](#) contacts based on their roles within the program. Any contacts requiring MBSAQIP Registry access can be managed in the [Data Platform Contacts](#) section.

Only the Primary Contact listed for your center is permitted to add, edit, and/or remove contacts. Please refer to the [Contact Management Guide](#) for instructions.

**It is the responsibility of the site to manage (add, edit, or remove) contacts. Contacts requiring deactivation from the registry should be removed immediately.**

Show: 14 entries Search:

Name	Site Role	Status	Additional Role
<a href="#">Cassandra Flores</a>	Data Platform Manager (MBSAQIP), MBS Coordinator, MBS Director, MBSAQIP Verified Surgeon, Other (Bariatric)	Active	
<a href="#">Charlote Jackson</a>	MBS Coordinator	Active	
<a href="#">Courtney Pojos</a>	MBS Coordinator, Other (Bariatric)	Active	Primary Contact
<a href="#">Kimberly Evans Labois</a>	MBSAQIP Verified Surgeon	Active	
Lisa Hale	Pending Verified Surgeon	Pending	
<a href="#">Maya Gonzalez</a>	Other (Bariatric)	Active	
<a href="#">Yohana Ghobry</a>	Other (Bariatric)	Active	

Showing 1 to 11 of 11 entries Previous 1 Next

[Add New Contact](#) [Change Primary/Billing Contact](#)

**MBSAQIP**  
Bariatric Surgery  
and Quality  
Improvement Program  
College of Surgeons

...ed on their roles within the program. Any contacts requiring MBSAQIP Registry access can be managed in the [Data Platform Contacts](#) section.

... add, edit, and/or remove contacts. Please refer to the [Contact Management Guide](#) for instructions.

**It is the responsibility of the site to manage (add, edit, or remove) contacts. Contacts requiring deactivation from the registry should be removed immediately.**

Show: 14 entries Search:

Name	Site Role	Status	Additional Role
<a href="#">Cassandra Flores</a>	Data Platform Manager (MBSAQIP), MBS Coordinator, MBS Director, MBSAQIP Verified Surgeon, Other (Bariatric)	Active	
<a href="#">Charlote Jackson</a>	MBS Coordinator	Active	
<a href="#">Courtney Pojos</a>	MBS Coordinator, Other (Bariatric)	Active	Primary Contact
<a href="#">Kimberly Evans Labois</a>	MBSAQIP Verified Surgeon	Active	
Lisa Hale	MBSAQIP Verified Surgeon	Active	
<a href="#">Maya Gonzalez</a>	Other (Bariatric)	Active	
<a href="#">Yohana Ghobry</a>	Other (Bariatric)	Active	

Showing 1 to 11 of 11 entries Previous 1 Next

[Add New Contact](#) [Change Primary/Billing Contact](#)

# SITE CONTACT MANAGEMENT

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## HOW TO EDIT OR REMOVE AN EXISTING CONTACT

To edit or remove a site contact the individual selected as the Primary Contact will need to follow the instructions below:

1. Log into the ACS Quality Portal & select the center for which you need to add a new contact.
2. Select **Site Contacts**.
3. Click on the name of the individual you need to edit or remove.
4. A new pop up window will appear with the site contacts information. In this window you will have the ability to update their individual's title, email, address, and assigned roles. You will not be able to edit their name.
5. You must select **Save** in order for your edits to be updated.
6. If you wish to remove this contact, you will simply hit **Remove Contact** at the bottom of the pop up window.
7. Because MBSAQIP has already reviewed and created their profile in the Quality Portal System. Your edited contact will appear in the site contacts tab with a status of **Active**.
8. If you remove a contact, they will no longer appear in your site contacts list.
9. You may repeat steps 1 - 6 above to continue editing or removing administrative site contacts.



# SITE CONTACT MANAGEMENT

## HOW TO EDIT OR REMOVE AN EXISTING CONTACT

Courtesy Peter  
Bariatric Test Site  
Prof.  
Company id: 18239  
Bariatric

[Site Information](#)  
[Site Profile](#)  
[Site Contacts](#)  
[Data Platform Contacts](#)  
[Invoices](#)  
[Schedule Site Visit](#)  
[FAQ](#)  
[Site Visit History](#)  
[Site Profile](#)  
[Resources](#)  
[Surgical Quality Factors](#)  
[Maintenance Database](#)

**ACS MBSAQIP**  
Metabolic and Bariatric Surgery  
Accreditation and Quality  
Improvement Program  
American College of Surgeons

This page allows the site to update administrative contacts based on their roles within the program. Any contacts requiring MBSAQIP Registry access can be managed in the **Data Platform Contacts** section.

Only the Primary Contact listed for your center is permitted to add, edit, and/or remove contacts. Please refer to the [Contact Management Guide](#) for instructions.

It is the responsibility of the site to manage (add, edit, or remove) contacts. Contacts requiring deactivation from the registry should be removed immediately.

Show: [x] entries Search:

Name	Site Role	Status	Additional Role
<b>Cassandra Peters</b>	Data Platform Manager (MBSAQIP), MBS Coordinator, MBS Director, MBSAQIP Verified Surgeon, Other (Bariatric)	Active	
<b>Charlene Johnson</b>	MBS Coordinator	Active	
<b>Courteney Foster Johnson</b>	MBS Coordinator, Other (Bariatric)		
<b>Simberly Evans MBS</b>	MBSAQIP Verified Surgeon		
<b>Yolanda Godley</b>	Other (Bariatric)		

Showing 1 to 10 of 10 entries

[Add New Contact](#) [Change Primary/Billing Contact](#)

**Contact Maintenance** Close

Make sure information is correct.

First Name: Cassandra  
Last Name: Peters  
Title: Surgeon  
\*Email: cpeters@facs.org  
\*Address: 633 N. Saint Clair  
test  
Country: United States  
City: Chicago  
State: Illinois  
Zip: 60611  
Phone: 312 202-6972 Ext:

(Country Code/Area Code/Number)

\*Roles:  Data Platform Manager (MBSAQIP)  MBS Coordinator  
 MBS Director  MBSAQIP Verified Surgeon  Other (Bariatric)

**3**

Close

**Contact Maintenance** Close

Make sure information is correct.

First Name: Cassandra  
Last Name: Peters  
Title: Surgeon  
\*Email: cpeters@facs.org  
\*Address: 633 N. Saint Clair  
test  
Country: United States  
City: Chicago  
State: Illinois  
Zip: 60611  
Phone: 312 202-6972 Ext:

(Country Code/Area Code/Number)

\*Roles:  Data Platform Manager (MBSAQIP)  MBS Coordinator  
 MBS Director  MBSAQIP Verified Surgeon  Other (Bariatric)

\*Indicates Required Field

**4** Close

# SITE CONTACT MANAGEMENT

## ASSIGNING OR CHANGING THE PRIMARY CONTACT & BILLING CONTACT

To assign or change the Primary Contact or Billing Contact the individual selected as the Primary Contact will need to follow the instructions below:

1. Log into the ACS Quality Portal & select the center for which you need to add a new contact to.
2. Select **Site Contacts**.
3. Click on **Change Primary/Billing Contact** at the bottom of the screen.
4. A new pop up window will appear with two drop down menus. These two drop down menus are for the primary contact and billing contact. In order to assign these additional roles to an individual at your center, they must first be entered in as a site contact with an administrative role.
5. Select the individual you wish to serve as the site contact and/or billing contact. These can be assigned to two different individuals or the same individual.
6. You must select **Save** in order for your selections to be updated.

**\*\*NOTE:** If you are changing the primary contact assignment from yourself to a new individual, you will not have access to make site contact changes once you select save. Please assure you make all necessary changes to your site contacts prior to assigning the primary contact role to someone else.

The screenshot displays the ACS MBSAQIP Site Contacts management interface. On the left, there is a navigation menu with options like 'Site Information', 'Site Profile', 'Site Contacts', and 'Data Platform Contacts'. The main content area features the ACS MBSAQIP logo and a heading: 'Metabolic and Bariatric Surgery Accreditation and Quality Improvement Program American College of Surgeons'. Below this, there is a text block explaining that the page allows site administrators to update administrative contacts and that only the Primary Contact is permitted to add, edit, or remove contacts. A table lists site contacts with columns for Name, Site Role, Status, and Additional Role. At the bottom of the page, there are two buttons: 'Add New Contact' and 'Change Primary/Billing Contact'. A red circle with the number '1' is placed over the 'Change Primary/Billing Contact' button, and a red arrow points to it from the right.

Name	Site Role	Status	Additional Role
<a href="#">Cassandra Estess</a>	Data Platform Manager (MBSAQIP), MBS Coordinator, MBS Director, MBSAQIP Verified Surgeon, Other (Bariatric)	Active	
<a href="#">Charlette McISSQ</a>	MBS Coordinator	Active	
<a href="#">Courtney Estess</a>	Data Platform Manager (MBSAQIP), Facility Chief Administrator, MBS Coordinator, MBS Director, MBSAQIP Verified Surgeon, Metabolic and Bariatric Surgical Clinical Reviewer, Other (Bariatric), Q Collaborative Contact	Active	
<a href="#">Tiffany Estess</a>	Other (Bariatric)	Active	

Showing 1 to 8 of 8 entries

[Add New Contact](#) [Change Primary/Billing Contact](#)

# SITE CONTACT MANAGEMENT

## ASSIGNING OR CHANGING THE PRIMARY CONTACT & BILLING CONTACT

**Primary Contact / Billing Contact Edit** Close

Primary Contact

Billing Contact

2

Courtney Polos

Megan Kampenga

Courtney Polos

Brett Beemer

Charlotte Jackson

Yohana Ghdey

Shannon Fogarty

Close

**Primary Contact / Billing Contact Edit** Close

Primary Contact

Billing Contact

3

Courtney Polos

Courtney Polos

Megan Kampenga

Courtney Polos

Brett Beemer

Charlotte Jackson

Yohana Ghdey

Shannon Fogarty

Maya Gonzalez

Anastacia Mebane

Active

Active

Active

Close

**Primary Contact / Billing Contact Edit** Close

Primary Contact

Billing Contact

4

Courtney Polos

Courtney Polos

Save

5

Name	Role	Active	Personal Role
<a href="#">Anastacia Mebane</a>	MBS Coordinator, MBSAQIP Verified Surgeon	Active	
<a href="#">Brett Beemer</a>	Bariatric Primary Contact, Data Platform Manager (MBSAQIP), QI Collaborative Contact	Active	
<a href="#">Charlotte Jackson</a>	MBS Coordinator	Active	
<a href="#">Courtney Polos</a>	MBS Coordinator, Other (Bariatric)	Active	Primary Contact/Billing Contact
<a href="#">Kimberly Evans Labok</a>	MBSAQIP Verified Surgeon	Active	
<a href="#">Maya Gonzalez</a>	Other (Bariatric)	Active	
<a href="#">Megan Kampenga</a>	MBS Coordinator	Active	
<a href="#">Shannon Fogarty</a>	Other (Bariatric)	Active	
<a href="#">Yohana Ghdey</a>	Other (Bariatric)	Active	

Showing 1 to 9 of 9 entries

Previous **1** Next

[Add New Contact](#) [Change Primary/Billing Contact](#)

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DATA  
PLATFORM  
CONTACT  
MANAGEMENT

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# DATA PLATFORM CONTACT MANAGEMENT

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## CONTACTS, ROLES, AND PERMISSIONS

The table below provides an overview of the data platform roles and the functions they are allowed to perform in the MBSAQIP Data Platform. Please note that the Data Platform Manager role is managed under the site contacts and does not have any access to the MBSAQIP Data Platform.

<b><u>Data Platform Contact</u></b>	<b><u>View Case Form Data</u></b>	<b><u>Edit Case Form Data</u></b>	<b><u>Edit Custom Fields/ Lists</u></b>	<b><u>Uploader</u></b>	<b><u>Workflow / Follow-up Reports</u></b>	<b><u>Benchmarking Reports</u></b>	<b><u>Resource Portal</u></b>
MBS QI User	✓				✓	✓	✓
MBS Data Abstractor	✓	✓	✓	✓	✓	✓	✓
Pending MBSCR	This role notifies MBSAQIP that a new MBSCR requires data platform access. “MBSCR” data platform access is granted after MBSAQIP confirms that the new MBSCR has completed all required training and/or recertification requirements.						

# DATA PLATFORM CONTACT MANAGEMENT

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## MBSAQIP DATA PLATFORM MANAGER REQUIREMENTS

- Each MBSAQIP participating center will have at minimum, one individual assigned as the Data Platform Manager.
- An individual may serve as the Data Platform Manager at more than one site.
- Data Platform Manager(s) will not share their login information (username/password), and will keep this information secure.
- Data Platform Manager(s) will handle requests for new data platform users, deactivations, reactivations, password resets, and updates to user information in a timely manner.
- Data Platform Manager(s) will deactivate user accounts for individuals that leave their site or their role in the program(s).

# DATA PLATFORM CONTACT MANAGEMENT

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## PENDING MBSCR STATUS & MBS DATA ABTRACTOR

Data Platform Managers are only able to grant Metabolic and Bariatric Surgical Clinical Reviewers the role of Pending MBSCR. MBSAQIP staff must verify training and certification status for all users added into the system prior to granting them access.

### **NEW MBSCRs**

- New MBSCRs are classified as individuals who have not previously served as an MBSAQIP MBSCR or let their certification lapse.
- New MBSCRs must be entered into the **Data Platform Contacts Tab** as a pending MBSCR. Once entered, MBSAQIPAccess@facs.org must be notified.
- MBSAQIP staff will register the Pending MBSCR for the required training. The individual will receive an email from MBSAQIPAccess@facs.org with instructions on how to complete the training.
- Once the Pending MBSCR has completed the training, they MUST notify MBSAQIPAccess@facs.org.
- MBSAQIP staff will process the Pending MBSCR and they will receive an email from IQVIA with their MBSAQIP Data Platform login credentials.
- In the quality portal under the data platform contact tab, you will see that the individuals the pending status will change to active. The assigned role will change from Pending MBSCR to MBSAQIP Data Abtractor.

### **EXISTING CERTIFIED MBSCRs**

- Existing MBSCRs are classified as individuals who have completed MBSAQIP MBSCR training and/or recertification and are considered a certified MBSCR.
- Existing MBSCRs must be entered into the **Data Platform Contacts Tab** as a pending MBSCR. Once entered, MBSAQIPAccess@facs.org must be notified.
- MBSAQIP staff will review and confirm the Pending MBSCRs training and certification history.
- If the individual is up to date on their training and/or certification, MBSAQIP staff will then process the Pending MBSCR and they will receive an email from IQVIA with their MBSAQIP Data Platform login credentials.
- In the quality portal under the data platform contact tab, you will see that the individuals assigned role will change from Pending MBSCR to MBSAQIP Data Abtractor.

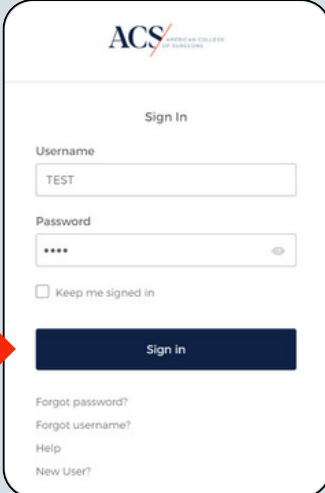
**\*\*NOTE:** Anyone requesting MBSAQIP Data Abtractor access to the MBSAQIP Data Platform must either complete the MBSAQIP MBSCR training or hold a current MBSCR certification before being granted access to the platform.

# DATA PLATFORM CONTACT MANAGEMENT

## HOW TO ADD A NEW DATA PLATFORM USER

To add an MBS QI User or Pending MBSCR the Data Platform Manager will need to follow the instructions below:

1. Log into the ACS Quality Portal & select the center for which you need to add a new contact.
2. Select **Data Platform Contacts**.
3. Select **Request New User** from the bottom of the page.
4. A new pop up window will appear. At the top of window, there will be a drop down from which you will select the role (MBS QI User or Pending MBSCR) the new user will be assigned.
5. Once the role is selected, fill out all of the required contact information, select the attestation checkbox, and select **Save**. If you do not select save, and only select close, the information will not be saved.
6. Your new added user will then appear in the site contacts tab with a status of **Pending**. MBSAQIP must review and approve all users prior to granting access to the Data Platform.
7. Notify MBSAQIPACCESS@FACS.ORG that a QI User or Pending MBSCR has been added as a data platform contact and requires access. MBSAQIP will review the added contact and determine if the individual can be granted access or requires training or recertification
8. You may repeat steps 1 - 7 above to continue adding new data platform users .

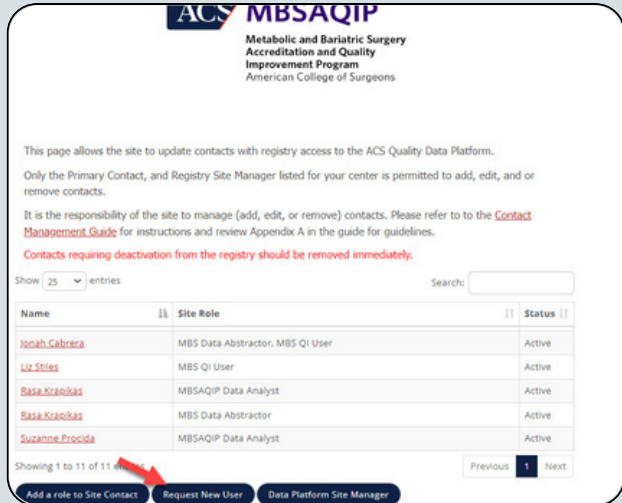
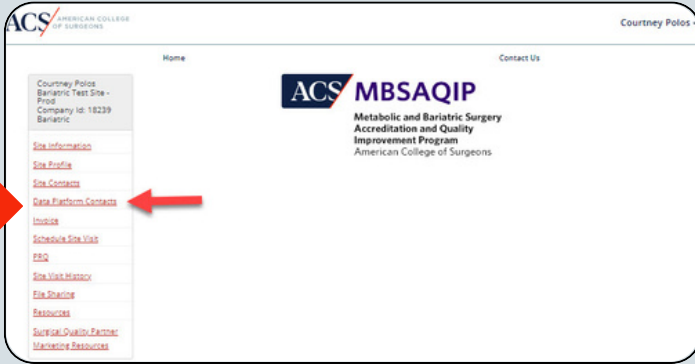


The screenshot shows the ACS Quality Portal Sign In page. At the top is the ACS logo with the text "AMERICAN COLLEGE OF SURGERONS" below it. The page title is "Sign In". There are two input fields: "Username" with the text "TEST" and "Password" with four asterisks. Below the password field is a checkbox labeled "Keep me signed in". A dark blue "Sign In" button is centered below the checkbox. At the bottom of the page are links for "Forgot password?", "Forgot username?", "Help", and "New User?". A red circle with the number "1" is overlaid on the "Sign In" button.



# DATA PLATFORM CONTACT MANAGEMENT

## HOW TO ADD A NEW DATA PLATFORM USER



# DATA PLATFORM CONTACT MANAGEMENT

## HOW TO ADD A NEW DATA PLATFORM USER

5

6

7

Close

\*Role: Select One

\*First Name: MBS QI User

\*Last Name: Pending MBSQR

\*Title:

\*Address:

\*Country: Select One

\*City:

\*State: Select One

\*Zip Code:

\*Email:

\*Phone: Ext:

(Country Code Area Code Number)

Attestation

I attest that I have read the documentation related to data platform users and will abide by the guidelines for accessing and managing data.

Save

Close

8

Name	Site Role	Status
courtney polos	Pending MBSQR	Pending
<a href="#">Jonah Cabrera</a>	MBS Data Abtractor, MBS QI User	Active
<a href="#">Liz Stiles</a>	MBS QI User	Active
<a href="#">Rasa Krapikas</a>	MBSAQIP Data Analyst	Active
<a href="#">Rasa Krapikas</a>	MBS Data Abtractor	Active
<a href="#">Suzanne Procidia</a>	MBSAQIP Data Analyst	Active

Showing 1 to 6 of 6 entries

Search:

Add a role

Name	Site Role	Status
<a href="#">Courtney Polos</a>	MBS Data Abtractor	Active
<a href="#">Jonah Cabrera</a>	MBS Data Abtractor, MBS QI User	Active
<a href="#">Liz Stiles</a>	MBS QI User	Active
<a href="#">Rasa Krapikas</a>	MBSAQIP Data Analyst	Active
<a href="#">Rasa Krapikas</a>	MBS Data Abtractor	Active
<a href="#">Suzanne Procidia</a>	MBSAQIP Data Analyst	Active

Showing 1 to 13 of 13 entries

Previous 1 Next

Add a role to Site Contact Request New User Data Platform Site Manager

# DATA PLATFORM CONTACT MANAGEMENT

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## ADDING A DATA PLATFORM ROLE TO A SITE CONTACT

To add MBS QI User or Pending MBSCR as an additional role to an already existing site contact, the Data Platform Manager will need to follow the instructions below:

1. Log into the ACS Quality Portal & select the center for which you need to add a new contact.
2. Select **Data Platform Contacts**.
3. Select **Add Role to Site Contact** from the bottom of the page.
4. A new pop up window will appear. At the top of window, there will be a drop down from which you will need to select the individual that you would like to assign the role of MBS QI User or Pending MBSCR.
  - a. Please note that the list of contacts to choose from will only populate those entered under the site contacts tab.
5. Once the individual is selected, use the second drop down menu to select MBS QI User or Pending MBSCR
6. Select the attestation checkbox, and select **Save**. If you do not select save, and only select close, the information will not be saved.
7. Your new added user will appear in the data platform contacts tab with a status of **Active**. Although the individual will have a status of active, they will not receive access to the MBSAQIP Data Platform until MBSAQIP reviews and approves their training and/or certification history and grants them access to the Data Platform.
8. Notify MBSAQIPACCESS@FACS.ORG that a QI User or Pending MBSCR has been added as a data platform contact and requires access. MBSAQIP will review the added contact and determine if the individual can be granted access or requires training or recertification.
  - a. If training or re-certification is required MBSAQIPAccess@facs.org will contact the user with instructions.
  - b. If the individual can be granted access to the Data Platform, they will receive an email from IQVIA with login information.
9. You may repeat steps 1 - 9 above to continue adding new data platform users.

# DATA PLATFORM CONTACT MANAGEMENT

## ADDING A DATA PLATFORM ROLE TO A SITE CONTACT

Showing 13 of 13 entries

Name	Site Role	Status
<a href="#">Courtney Polos</a>	MBS Data Abstractor	Active
<a href="#">Jonah Cabrera</a>	MBS Data Abstractor, MBS QI User	Active
<a href="#">Liz Stiles</a>	MBS QI User	Active
<a href="#">Rasa Kraolikas</a>	MBSAQIP Data Analyst	Active
<a href="#">Rasa Kraolikas</a>	MBS Data Abstractor	Active
<a href="#">Suzanne Procidie</a>	MBSAQIP Data Analyst	Active

Showing 1 to 13 of 13 entries

Previous 1 Next

1 → Add a role to Site Contact Request New User Data Platform Site Manager

2 →

• Contact: Select One

• Role: Select One

- Anastacia Mebane
- Charlotte Jackson
- Kimberly Evans Labok
- Maya Gonzalez
- Megan Kampenga
- Shannon Fogarty
- Yohana Ghdey

Attestation

I attest that I have read the documentation related to data platform users and will abide by the guidelines for accessing and managing data.

3 →

• Contact: Kimberly Evans Labok

• Role: Select One

- Select One
- MBS QI User
- Pending MBSQR

Attestation

I attest that I have read the documentation related to data platform users and will abide by the guidelines for accessing and managing data.

4 →

• Contact: Kimberly Evans Labok

• Role: MBS QI User

Attestation

I attest that I have read the documentation related to data platform users and will abide by the guidelines for accessing and managing data.

5 → Save

Contacts requiring deactivation from the registry should be removed immediately.

# DATA PLATFORM CONTACT MANAGEMENT

## ADDING A DATA PLATFORM ROLE TO A SITE CONTACT

6



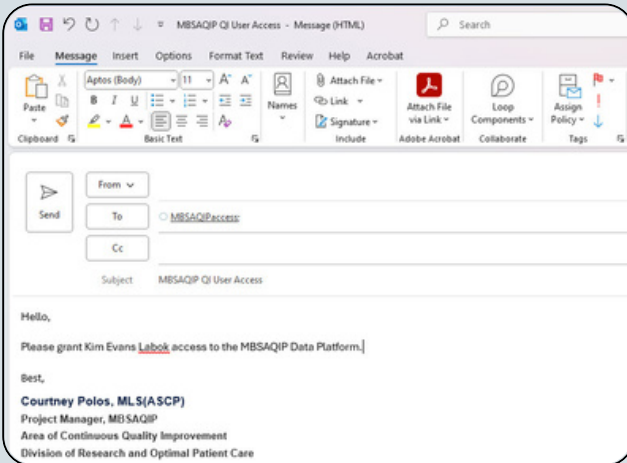
Name	Site Role	Status
<a href="#">Courtney Polos</a>	MBS Data Abstractor	Active
<a href="#">Esterlin Vargas</a>	MBS QI User, MBSAQIP Data Analyst	Active
<a href="#">Jonah Cabrera</a>	MBS Data Abstractor, MBS QI User	Active
<a href="#">Kimberly Evans Labok</a>	MBS QI User	Active
<a href="#">Liz Stiles</a>	MBS QI User	Active
<a href="#">Dana Kraolikas</a>	MBSAQIP Data Analyst	Active
<a href="#">Dana Kraolikas</a>	MBS Data Abstractor	Active
<a href="#">Suzanne Prociak</a>	MBSAQIP Data Analyst	Active

Showing 1 to 14 of 14 entries

Previous 1 Next

[Add a role to Site Contact](#) [Request New User](#) [Data Platform Site Manager](#)

7



MBSAQIP QI User Access - Message (HTML)

File Message Insert Options Format Text Review Help Acrobat

Clipboard Basic Text

From: [Redacted]

To: [MBSAQIP Access](#)

Cc: [Redacted]

Subject: MBSAQIP QI User Access

Hello,

Please grant Kim Evans [Labok](#) access to the MBSAQIP Data Platform.

Best,

**Courtney Polos, ML S(ASCP)**  
Project Manager, MBSAQIP  
Area of Continuous Quality Improvement  
Division of Research and Optimal Patient Care

# DATA PLATFORM CONTACT MANAGEMENT

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## HOW TO EDIT & REMOVE AN EXISTING CONTACT

To edit an existing MBS QI User, Pending MBSCR, or MBSAQIP Data Abstractors information, the Data Platform Manager will need to follow the instructions below:

1. Log into the ACS Quality Portal & select the center for which you need to add a new contact.
2. Select **Data Platform Contacts**.
3. Click on the name of the individual to edit or remove from the contact list.
4. A new pop up window will appear with the contacts information. In this window, you will have the ability to update their title, email, address, and assigned roles. You will not be able to edit their name.
5. Select the **attestation checkbox**, and select save. If you do not select save, and only select close, the information will not be saved.
6. If you wish to remove this contact, you will click **Remove Contact** at the bottom of the pop up window.
7. Your edited contact will appear in the data platform contacts tab with a status of Active.
8. If an individuals role is changed from QI User to Pending MBSCR, the individual **MUST** complete training or have a current certification to access the data platform. You must email [MBSAQIPAccess@facs.org](mailto:MBSAQIPAccess@facs.org) to request data platform access. MBSAQIP will review the added contact and determine if the individual can be granted access or requires training or recertification.
  - a. If training or re-certification is required [MBSAQIPACCESS@FACS.ORG](mailto:MBSAQIPACCESS@FACS.ORG) will contact the user with instructions.
  - b. If the individual can be granted access to the Data Platform, they will receive an email from IQVIA with login information.
9. If an individuals role is changed from MBSAQIP Data Abstractor to QI User the individual will no longer have abstracting abilities, and will only be able to view data entered into the data platform. MBSAQIP does not need to be notified in this situation.
10. If you removed a contact, they will no longer appear in your site contacts list.

# DATA PLATFORM CONTACT MANAGEMENT

## HOW TO EDIT & REMOVE AN EXISTING CONTACT

**1** →

Name	Site Role	Status
<b>Courtney Polos</b>	MBS Data Abstractor	Active
Jonathan Cabrera	MBS Data Abstractor, MBS QI User	Active
Liz Stiles	MBS QI User	Active
Rasa Kravikas	MBSAQIP Data Analyst	Active
Rasa Kravikas	MBS Data Abstractor	Active
		Active

**2** →

**3** →

**4** →

**Contact Maintenance**

First Name: Courtney  
Last Name: Polos  
Title: bariatric surgeon  
\*Email: cpolos@facs.org  
\*Address: 123 st claine  
\*Country: United States  
\*City: Oak Park  
\*State: Select One  
\*Zip: 60304  
\*Phone: [ ] [517] [414-0099] Ext. [ ]  
Roles: MBS Data Abstractor  
Required Field  
Save Contact Remove Contact

**Contact Maintenance**

First Name: Courtney  
Last Name: Polos  
Title: bariatric surgeon  
\*Email: cpolos@facs.org  
\*Address: 123 st claine  
\*Country: United States  
\*City: Oak Park  
\*State: Select One  
\*Zip: 60304  
\*Phone: [ ] [517] [414-0099] Ext. [ ]  
Roles: MBS Data Abstractor  
\*Indicates Required Field  
Save Contact Remove Contact

# DATA PLATFORM CONTACT MANAGEMENT

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## ADDING AN ADDITIONAL DATA PLATFORM MANAGER

To add an additional Data Platform Manager, the current Data Platform Manager or primary contact will need to follow the instructions below:

### Adding a New Data Platform Manager

1. Log into the ACS Quality Portal & select the center for which you need to add a new contact.
2. Select **Data Platform Contact**.
3. Click on Data Platform Site Manager at the bottom of the page.
4. A new pop up window will appear for entering the contact information of the additional or new Data Platform Manager.
5. Select the **attestation checkbox**, and select **Save**. If you do not select save, and only select close, the information will not be saved.
6. You must email MBSAQIPACCESS@FACS.ORG to be granted access to the MBSAQIP Quality Portal
7. MBSAQIPACCESS@FACS.ORG will contact the user with their login information.

**\*\*NOTE:** this individual will not appear under the data platform contacts tab, but instead under the site contacts tab.



# DATA PLATFORM CONTACT MANAGEMENT

---

## ADDING A NEW DATA PLATFORM MANAGER

1

Show 25 entries Search:

Name	Site Role	Status
<a href="#">Courtney Polos</a>	MBS Data Abstractor	Active
<a href="#">Jonah Cabrera</a>	MBS Data Abstractor, MBS QI User	Active
<a href="#">Liz Stiles</a>	MBS QI User	Active
<a href="#">Basa Kraoikas</a>	MBSAQIP Data Analyst	Active
<a href="#">Basa Kraoikas</a>	MBS Data Abstractor	Active
<a href="#">Suzanne Procida</a>	MBSAQIP Data Analyst	Active

Showing 1 to 13 of 13 entries Previous 1 Next

[Add a role to Site Contact](#) [Request New User](#) [Data Platform Site Manager](#)

2

3

4

Close

### Data Platform Site Manager

Use Facility Address

- First Name:
- Last Name:
- Title:
- Address:
- Country:
- City:
- State:
- Zip Code:
- Email:
- Phone:   Ext:

(Country Code/Intl Code/Number)

Attestation

- I attest I have reviewed the documentation related to Data Platform Site Manager responsibilities and will abide by the guidelines provided.

[Save](#) [Close](#)

# DATA PLATFORM CONTACT MANAGEMENT

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## EDITING AND/OR ADDING THE DATA PLATFORM MANAGER ROLE TO AN EXISTING CONTACT

To edit or add an additional Data Platform Manager, the current Data Platform Manager or primary contact will need to follow the instructions below:

### **Editing and/or Adding the Data Platform Manager Role to an Existing Contact**

- 1.The data platform manager or primary contact can edit an existing Data Platform Manager or add a new Data Platform Manager from the site contacts tab.
- 2.To edit an existing Data Platform Manager or add the role of Data Platform Manager to an already existing site contact, select the individuals name to edit their contact information and select an additional role of Data Platform Manager from the dropdown.
- 3.You must select **Save**. If you do not select save, and only select close, the information will not be saved.

# DATA PLATFORM CONTACT MANAGEMENT

## EDITING AND/OR ADDING THE DATA PLATFORM MANAGER ROLE TO AN EXISTING CONTACT

Courtney Polos  
Bariatric Test Site -  
Prod  
Company Id: 18239  
Bariatric

[Site Information](#)  
[Site Profile](#)  
[Site Contacts](#)  
[Data Platform Contacts](#)  
[Invoice](#)  
[Schedule Site Visit](#)  
[PBI](#)  
[Site Visit History](#)  
[File Sharing](#)  
[Resources](#)  
[Surgical Quality Partner](#)  
[Marketing Resources](#)

**ACS MBSAQIP**  
Metabolic and Bariatric Surgery  
Accreditation and Quality  
Improvement Program  
American College of Surgeons

This page allows the site to update **administrative** contacts based on their roles within the program. Any contacts requiring MBSAQIP Registry access can be managed in the **Data Platform Contacts** section.

Only the Primary Contact listed for your center is permitted to add, edit, and/or remove contacts. Please refer to the [Contact Management Guide](#) for instructions.

It is the responsibility of the site to manage (add, edit, or remove) contacts. Contacts requiring deactivation from the registry should be removed immediately.

Show  entries Search:

Name	Site Role	Status	Additional Role
<a href="#">Anastacia Mebane</a>	MBS Coordinator, MBSAQIP Verified Surgeon	Active	
<a href="#">Brett Beemer</a>	Bariatric Primary Contact, Data Platform Manager (MBSAQIP), Qi Collaborative Contact	Active	
<a href="#">Charlone Jackson</a>	MBS Coordinator	Active	
<a href="#">Courtney Polos</a>	Data Platform Manager (MBSAQIP), MBS Coordinator, Metabolic and Bariatric Surgical Clinical Reviewer, Other (Bariatric)	Active	Primary Contact/Billing Contact
<a href="#">Kimberly Evans Lebo</a>	Data Platform Manager (MBSAQIP), MBS Coordinator	Active	
<a href="#">Maya Gonzalez</a>	Other (Bariatric)	Active	
<a href="#">Megan Kimpanga</a>	MBS Coordinator	Active	
<a href="#">Shannon Fogarty</a>	Other (Bariatric)	Active	
<a href="#">Yohana Godey</a>	Other (Bariatric)	Active	

Showing 1 to 9 of 9 entries Previous **1** Next

[Add New Contact](#) [Change Primary/Billing Contact](#)

# DATA PLATFORM CONTACT MANAGEMENT

## EDITING AND/OR ADDING THE DATA PLATFORM MANAGER ROLE TO AN EXISTING CONTACT

**Contact Maintenance** Close

Make sure information is correct.

**First Name**

**Last Name**

**Title**

**\*Email**

**\*Address**

**\*Country**  ▼

**\*City**

**\*State**  ▼

**\*Zip**

**\*Phone**   Ext

**\*Roles**

**\*Indicates Required**

- Data Platform Manager (MBSAQIP)
- Facility Chief Administrator
- Marketing Contact
- MBS Coordinator
- MBS Director

Close

LABOR Mava Gonzalez | Contact Management

**\*Indicates Required Field**

Close

LABOR Mava Gonzalez | Contact Management