

DRIVE

Case Management System

General User Manual

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1. Introduction

This document is intended to give the user a comprehensive overview of all the main functions and features of the DRIVE Case Management System and how to use them.

This system is located at: <https://drive.zimmerbiomet.com>

2. DRIVE Overview

DRIVE Case Management System (DCMS) is a Zimmer Biomet portal that will be the new location for case management of Materialise Personalized Guides for brands including:

- Persona® The Personalized Knee
- Vanguard® Knee
- NexGen® Complete Knee Solution
- Natural-Knee® System
- Oxford® Partial Knee
- Zimmer® Unicompartmental High Flex Knee*

*Not available in all countries

DCMS is supported by all common web browsers (i.e. Google Chrome, Mozilla Firefox, Apple Safari, and Microsoft Internet Explorer v11). DCMS allows the Surgeon to access the surgical planner and approve cases, along with many other features. It combines the Signature™ Online Case Management (SOMS) and Zimmer Online Case Management (ZOMS) Portals together, to provide one central location for internal and external Zimmer Biomet Personnel to access surgical cases.

Note: The many benefits of this web-based system include: global availability, no software installation required, and multiple user-interface capability including: PC, Mac, iPad, and tablet. Personal preferences (i.e. implants and instruments) are stored in the profile associated with the user's login.

2.1 Transfer Process and Credentialing

All SOMS and ZOMS users who have logged in at least once with credentials since January 2017 will be transferred to DCMS. There will be a onetime authentication process for each user upon registering. The authentication process will be necessary for every machine that the user logs on to. **Zimmer Biomet Sales Representatives will now be required to use Active Directory (AD) Accounts if they originally used an outside email address (i.e. Gmail or Yahoo).** All new users will need to reference Relationship HUB Documents for further registration instructions. Refer to Section 6.

Relationships will be established based on current SOMS/ZOMS (i.e. Surgeon A linked to Sales Representative Team Member A).

Sales Representative team members will use Zimmer Biomet Credentials to login (i.e. John Doe: last name + first initial e.g. doej).

Note: Customer Support at Personalized Solutions will be the go-to place for any questions on scan sites, case questions, and how to use DCMS. The IT Help Desk will be the resource for any technical Active Directory Account questions.

2.2 User Roles

Customer Service Representatives (CSRs), Administrators, Surgeons, Sales Representatives, Scan Technicians, and Patient Care Coordinators (PCCs) will have access to the DCMS Portal.

Materialise will be responsible for the “Segmentation,” “Planning,” “Guide Design,” “Manufacturing,” and “Shipping” (Figure 2).

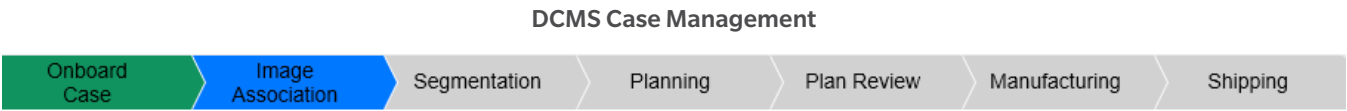


Figure 2

Abbreviations

DCMS	DRIVE Case Management System
CSR	Customer Support Representative
PCC	Patient Care Coordinator
NAM	North America
EMEA	Europe/Middle East/Africa
M3S	Materialise Medical Manufacturing System
APAC	Asia Pacific
PO	Purchase Order
MTLS	Materialise
SOMS	Signature Online Management System
ZOMS	Zimmer Online Management System
SCP	SurgiCase® Planner

Figure 3

Internal and External DCMS Authorization

Administrator	CSR	Sales Representative
<ul style="list-style-type: none"> • Create Case • View Case • View Case List • Update Case List • Update Case Cancel • Update Case Code • Create Comment • View Comment • Create Note • View Note • Create DICOM Study • View Audit Record • View Plan • Update Plan Save • Update Surgery Information • View Protected Health Information • Update Protected Health Information • Create Purchase Order-External • Update Purchase Order External • Create Purchase Order • Update Purchase Order • Create Error Handling • View Reports • View Logistics Information • View Shipping Information • Update Shipping Information 	<ul style="list-style-type: none"> • Create Case • View Case • View Case List • Update Case List • Update Case Cancel • Update Case Code • Create Comment • View Comment • Create Note • View Note • Create DICOM Study • View Audit Record • View Plan • Update Plan Save • Update Surgery Information • View Protected Health Information • Update Protected Health Information • Create Purchase Order-External • Update Purchase Order-External • Create Purchase Order • Update Purchase Order • Create Image Association • View Image Rejection Override • Create Error Handling • View Reports • View Logistics Information • View Shipping Information • Update Shipping Information • Create Expedited Case 	<ul style="list-style-type: none"> • Create Case • View Case • View Case List • Update Case List • Update Case Cancel • Update Case Code • Create Note • View Note • Create DICOM Study • View Plan • Update Surgery Information • View Protected Health Information • Update Protected Health Information • Create Purchase Order- External • Update Purchase Order-External • Create Purchase Order • Update Purchase Order • View Case Reports • View Logistics Information • View Shipping Information • Update Shipping Information
Surgeon	PCC	Scan Technician
<ul style="list-style-type: none"> • Create Case • View Case • View Case List • Update Case • Update Case Cancel • Create Comment • View Comment • Create DICOM Study • View Plan • Update Plan Approve • Update Plan Save • Update Surgery Information • View Protected Health Information • Update Protected Health Information • Create Purchase Order-External • Update Purchase Order External • View Reports • View Logistics Information • View Shipping Information • Update Shipping Information 	<ul style="list-style-type: none"> • Create Case • View Case • View Case List • Update Case • Update Case Cancel • Create Comment • View Comment • Create DICOM Study • View Plan • Update Surgery Information • View Protected Health Information • Update Protected Health Information • Create Purchase Order-External • Update Purchase Order External • View Reports • View Logistics Information • View Shipping Information • Update Shipping Information 	<ul style="list-style-type: none"> • View Case • Create DICOM Study

Figure 4

Note: Please reference the internal and external authorizations listed above when accessing the DCMS Portal to avoid user-role confusion.

3. User Manual

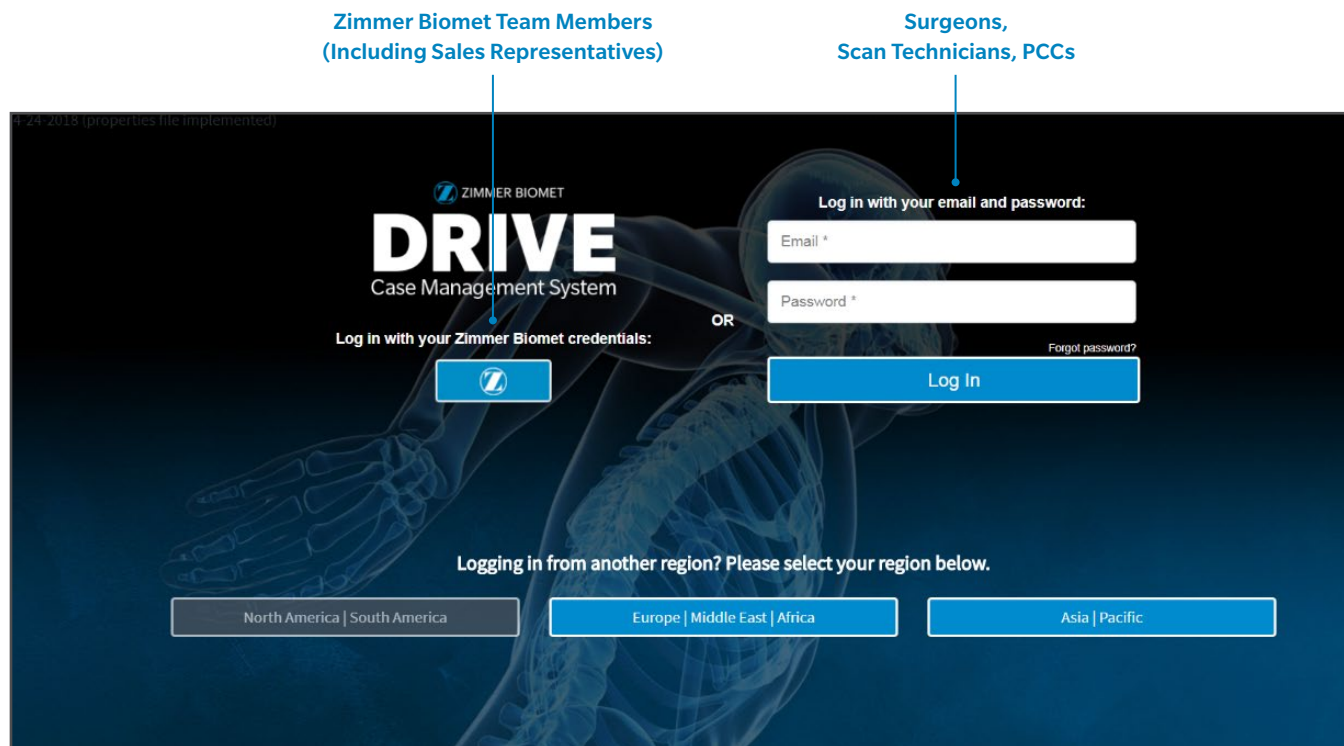



Figure 5

3.1 Logging On

Zimmer Biomet Members, including Sales Representatives will press the  button and login with Zimmer Biomet Credentials (Figure 5). The user's region will automatically be selected based on log on locations.

Those who are non-Zimmer Biomet Personnel (i.e. Surgeons, Scan Technicians, and PCCs) will login with emails and passwords in the section located on the right side of the DRIVE Login Page.

Note: Corporate IT Security and the industry best practice is to require two-factor authentication for accessing systems with confidential information (i.e. PHI – protected health information). You will need to:

- 1) Enter password
- 2) Get a verification code (text message)

Verification codes will expire after 10 minutes. If your code expires, you will need to request a new one. Select the “Back” button on the browser and re-login, and a new code will be sent. If this is your first time logging in, please refer to section 6.3 New User Registration for specific details on how to register.

Note: When traveling outside your home region, the login will default to the geographic location where you are signing in from. You will need to select a home region before logging in with credentials.

You should check the “Remember Me” box to avoid the two-step verification process every time you log in.

To access “Legal and Privacy Notices”:

- 1 Select “Legal & Privacy Notices” in the footer links (Figure 6).
- 2 Then, select the form or notice you would like.

The screenshot shows the ZIMMER BIOMET Case List interface. The left sidebar contains navigation links: My Work, Cases, Image Upload, Image Association, Image Rejection, CSR Admin, Vanguard Select Cases, Error Handling, and Reports. The main area displays a table of cases with columns: Patient Code, External ID, Patient, Surgery Date, Case Status, Surgeon, Account, Procedure, Scan Center, and Comments Added. A 'TOTAL COUNT: 1851' is shown above the table. A blue circle highlights the 'Legal & Privacy Notices' link in the footer. A blue arrow points from this link to the 'Legal & Privacy Notices' text below the figure caption.

Patient Code	External ID	Patient	Surgery Date	Case Status	Surgeon	Account	Procedure	Scan Center	Comments Added
NTE-TT-0434-L-000		Noorul Test	29-Aug-2018	Case Creation Failed	Test Nam Surgeon Test Nam Surge+	Test Account US	Knee - Total (Left)		
CGZ-QN-0219-L-000	ZB18-RIX-AMA	cZXCZX cZXCZX	29-Aug-2018	Image Upload	QATatia NAMSurgeon	Test Account NAM US	Knee - Total (Left)		
CZX-QN-0220-L-000	ZB18-XID-UHO	cZZX ZXZXZX	29-Aug-2018	Image Upload	QATatia NAMSurgeon	Test Account NAM US	Knee - Total (Left)		
AAS-QN-0133-L-000	ZB18-TIH-MIT	asdasdtest asdasd	30-Aug-2018	Image Upload	QATatia NAMSurgeon	Test Account NAM US	Knee - Total (Left)		
EIA-QN-0919-R-000	ZB18-IGO-DOL	Eighteen IATest	31-Aug-2018	Image Review	QATatia NAMSurgeon	Test Account NAM US	Knee - Total (Right)		
		cxcsc CXCZXC	31-Aug-2018	Case Created	MtIsSurgeon TestRomania	Medical Technologies International	Knee - Total (Left)		
		test testfsdf	31-Aug-2018	Case Created	MtIsSurgeon TestSweden	Biomet Orthopaedics AB - MK	Knee - Total (Left)		
		dasdas ffsdf	31-Aug-2018	Case Created	MtIsSurgeon TestSweden	Biomet Orthopaedics AB - MK	Knee - Total (Left)		
		zxczxdfs sdfsdcsdfsd	31-Aug-2018	Case Created	MtIsSurgeon TestSweden	Biomet Orthopaedics AB - MK	Knee - Total (Left)		

Availability of Personalized Solutions products and systems may vary based upon geographic region. Please consult your local vendor for support.

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Figure 6

Legal & Privacy Notices

3.2 Creating a Case

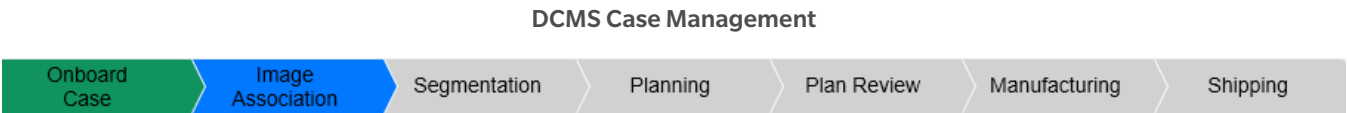


Figure 7

In Figure 7, green on the progress bar indicates a complete phase, blue indicates a current phase, and grey indicates a future phase to be completed.

Once logged into the portal, if you are an Administrator, CSR, Sales Representative, Surgeon, or PCC, you have the authorization to create a patient case.

Note: User permissions are based on regional requirements. For example, only the Surgeon and PCC can create cases in EMEA.

To create case, an Administrator, CSR, Surgeon, Sales Representative, or PCC should:

- 1 Select “Add a Case” function (Figure 8).
Note: If the Surgeon logs in, step 1 will read: “Patient”
- 2 Select “Personalized Solutions” and search for Surgeon’s name and region.
- 3 Check the ‘Surgeons List’ and select “Open” when Surgeon’s name appears (Figure 9).

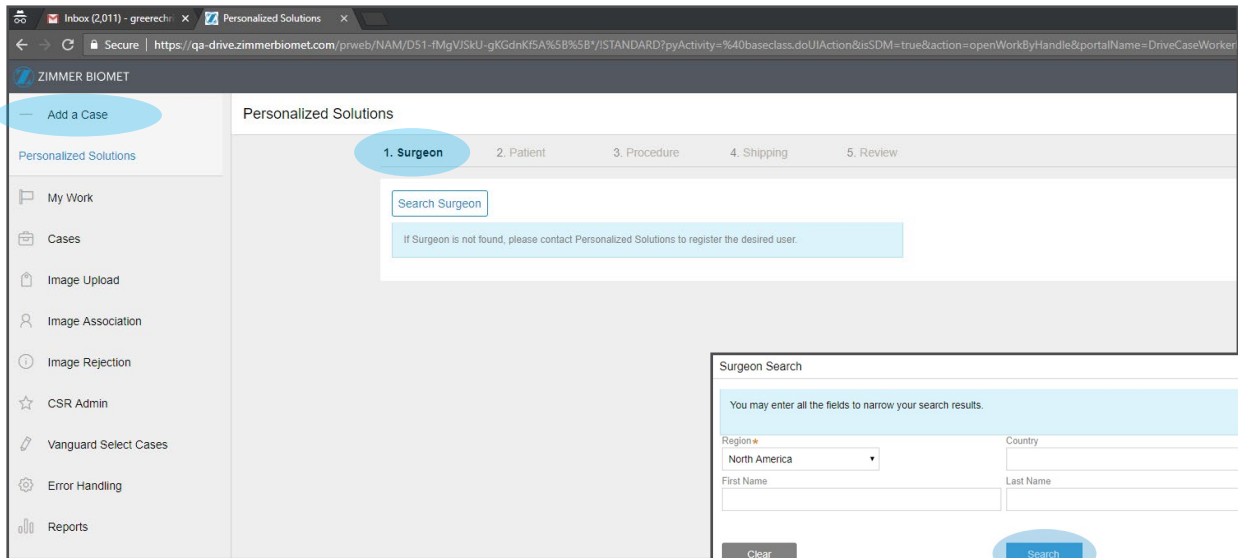


Figure 8

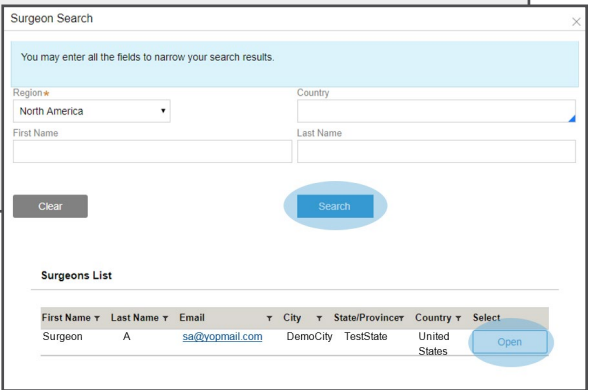


Figure 9

- 4 Select the “Continue” button **Continue** at the bottom right-hand corner when the complete to move onto the next step.
- 5 Fill out the patient information in step 2 (Figure 10). Then, select the “Account/ Hospital,” the “Sales Team/ Rep,” and the “Distributor/ Country” (indicated by *). Next, fill out the “Patient Information” section. The required fields in this section are as follows:
 - Patient First Name
 - Patient Last Name
 - Patient Date of Birth
 - Gender

The Patient Middle Name and Patient ID are optional fields.

When complete, select the “Continue” button **Continue** at the bottom right-hand corner and move onto the next step.

To refer back to previous pages, select the “Back” button **Back** located at the bottom left-hand corner of each page.

Personalized Solutions

1. Surgeon 2. Patient 3. Procedure 4. Shipping 5. Review

Surgeon Name
TestNam Validation

Account / Hospital*
Test Account NAM US

Sales Team / Rep*
Test Sales Team Nam-tttt

Distributor / Country*
Test Team US

Patient Information

Patient First Name*
Patient

Patient Middle Name
Middle Name

Patient Last Name*
A

Patient Date of Birth*
Apr 17 1935

Age
83

Gender*
Male

Optional: Internal Hospital Patient ID

Figure 10

6 Fill out the procedure in step 3 (Figure 11). It is required to select:

- Body Side
- Procedure
- Surgery Date (Please note: a minimum of 20 business days is required for manufacturing)
- Scan Center

After the “Body Side” is selected, the option to select “Bone Model” is available. Select either “MRI” or “CT” in order to select a Scan Center.

Note: By checking the “Bone Model” box, you indicate that you would like to receive a bone model with the patient case. If you order the Signature Vanguard Total Knee or Oxford Partial Knee, and you are located in a 100% bone model country (U.S., Australia, Israel, Canada, and New Zealand), then you will receive a bone model with the case, regardless if you select it or not. By checking the “Vanguard Select (PSF),” you indicate that you would like to receive a patient specific femur.

To refer back to previous pages, select the “Back” button **Back** located at the bottom left-hand corner of each page.

When complete, select the “Continue” button **Continue** at the bottom right-hand corner and move onto the next step.

Personalized Solutions

✓ 1. Surgeon ✓ 2. Patient **3. Procedure** 4. Shipping 5. Review

Body Side★
Left ▼

Procedure★
Knee - Partial ▼

Surgery Date★
September ▼ 14 ▼ 2018 ▼

Body Side Left

☒ Patient Specific Guides ☒ MRI

☐ Bone Model

☒ Vanguard Select (PSF)

Scan Center★
Select.. ▼

Image Upload Deadline
17-Aug-2018

Note: Please send images on or before the Image Upload Deadline in order to meet the Surgery Date specified above

Optional: Hospital PO Number

Figure 11

7 In step 4, the default shipping address will appear as the distributorship address for the United States (NAM) and as the country-specific locations for Canada (NAM), APAC, and EMEA (Figure 12). If you are located in US and would like to change the address, then you can do so at this time by overwriting on the following fields:

- Attention
- Name
- Country
- Street 1 (and possibly Street 2 and/or Street 3)
- State/Province
- City
- Zip Postal Code

Note: If you are located in Canada, APAC, or EMEA, this option is not available. It must go to the country-specific location address. In some countries, the shipping has been set to local Zimmer Biomet offices.

To refer back to previous pages, select the “Back” button **Back** located at the bottom left-hand corner of each page.

When complete, select the “Continue” button **Continue** at the bottom right-hand corner and move onto the next step.

The screenshot shows a web interface titled "Personalized Solutions" with a progress bar at the top indicating five steps: 1. Surgeon, 2. Patient, 3. Procedure, 4. Shipping (highlighted), and 5. Review. Below the progress bar, the "Shipping Address" section contains the following fields:

Attention★ Test US Distributor		
Name★ Test Team US		
Country★ United States		
Street 1★ 332 E Bell Dr.	Street 2	Street 3
State/Province★ Indiana	City★ Warsaw	ZIP/Postal Code★ 46582

Figure 12

- 8 In step 5, you can review the patient case (Figure 13). In this section, you can view the name of the Surgeon, Patient Information, and the Body Side Information. If you need to refer back to any of the previous pages, you can select the “Back” button **Back** located at the bottom left corner of each page.

Once the patient case is reviewed, select the “Continue” button at the bottom right-hand corner of the screen.

After a new patient case is created, anyone associated with the case will be emailed and notified.

Personalized Solutions

✓ 1. Surgeon ✓ 2. Patient ✓ 3. Procedure ✓ 4. Shipping **5. Review**

Surgeon Name Test Nam Surgeon Test Nam Surgeon		
Account / Hospital Test Account US	Sales Team / Rep Test Sales Team NAM Demo	Distributor / Country DEMO NAM US Distrib
Patient Full Name Patient A		
Patient Date of Birth 16-May-1936	Age 82	
Gender Male	Optional: Internal Hospital Patient ID _____	
Body Side Left		
Procedure Knee - Partial		
Surgery Date 05-Apr-2019		
Body Side Left		

Figure 13

3.3 Image Upload Methods

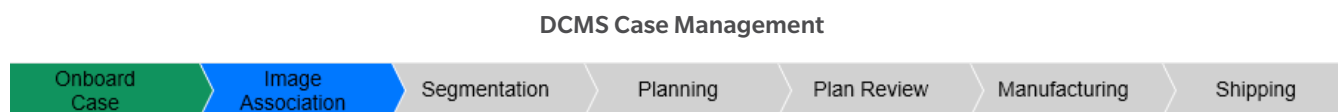


Figure 14

CSRs will monitor the “Image Upload” function and will be notified when the image upload is past due (Figure 14). The Scan Center will be sent a three day advanced warning to upload the images, a one day warning, and an email one day after the images are uploaded. The Sales Representative will be copied on all three of the emails. The Surgeon will only be copied on the email in EMEA. The PCC will be copied on the post-upload email.

Three ways to get images to Zimmer Biomet Personalized Solutions:

- Direct Method (This is the preferred method by Zimmer Biomet)
- Mail in CD
- Web Uploader via Nuance Powershare

Direct Method can be uploaded via Laurel Bridge DICOM Router or via VPN. This is an already-in-place feature, and it is supported by Zimmer Biomet Personalized Solutions.

3.3.1 Setting Up the Direct Method

Initial steps include:

- 1 The Sales Representative contacts the targeted Scan Centers to start discussions and gathers contact information regarding the Scan Centers (i.e. name, phone number, email, address, CT/MRI)
- 2 The Sales Representative contacts Personalized Solutions Customer Support Team at: personalizedsolutions@zimmerbiomet.com / 574-371-3710 and provides them the Scan Center Contact Information.

The Personalized Solutions Picture, Archive and Communications System (PACS) Support Team Process includes:

- 1 Scan Center contact Information are provided to Personalized Solutions PACS Support Team to initialize set up.
- 2 An initial introduction email sent to the provided contact person outlining the two primary ways preferred to receive images (VPN or Laurel Bridge/Compass).
- 3 If the site is not comfortable with either of those options – a call is scheduled to discuss other secure ways to send the images that are compliant with local laws and regulations.
- 4 Once the connection is established, the test images are sent in for Customer Service to review.

3.3.2 Image Upload Step within DCMS

If you are transferring images, you need to indicate how you intend to transfer those images to Zimmer Biomet (Figure 15).

- Option 1:** Direct Method - Images are sent via Laurel Bridge or VPN.
- Option 2:** CD - Images are burnt on a disc and mailed (send via UPS or FedEx) to Personalized Solutions at:
Zimmer Biomet
Attention: Personalized Solutions, Building D
56 E Bell Drive
Warsaw, IN 46582
- Option 3:** Web Uploader - User selects the “Nuance” button.

If you are a CSR, you will need to associate the images once the images have been uploaded. This will need to be completed within 24 hours of the status changed to “Image Association.”

Upload Image

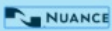
Due in 12 days ago

Please indicate the method by which images have been uploaded to Zimmer Biomet.

Option 1 : Direct Method
By selecting this option, you are indicating that images have already been sent directly to Zimmer Biomet via a VPN connection or Laurel Bridge.

Option 2 : CD
By selecting this option, you are indicating that images have been mailed to Zimmer Biomet via CD. (Note: Not Available in EMEA)

Option 3 : Web Uploader
By selecting this option, you are indicating that images have been sent to Zimmer Biomet via the Nuance PowerShare web uploader. Click the below icon to access the web uploader



☐ Option 1 : Direct Method

☐ Option 2 : CD

☐ Option 3 : Web Uploader

Cancel

Submit

Figure 15

3.4 Case Lists

3.4.1 Menu Bar

The menu bar is located to the left-hand side of the screen. Depending on your authorization, some work baskets will be restricted (Figure 16). All of the work baskets within the menu bar are listed as:

- **My Work:** Requires the specific user logged in to take action
- **Cases:** Shows all of the active cases (some may require action, and others may not)
- **Image Upload:** All of the cases in the image upload status (a user will need to take action)
- **Image Association:** Images are ready to be associated by Customer Support
- **Image Rejection:** Images that have problems, geographic issues, or discrepancies that Materialise sends. CSRs will need to look into the problem.
- **CSR Admin:** Cases that require CSRs to enter PO numbers are delegated here
- **Vanguard Select:** A specialized tab for the Patient Specific Femur (PSF)
- **Error Handling:** When images do not get transferred over to Materialise properly. This is system to system communication. Customer Support will need to look into how to resolve the problem.
- **Reports:** How one accesses closed and cancelled cases

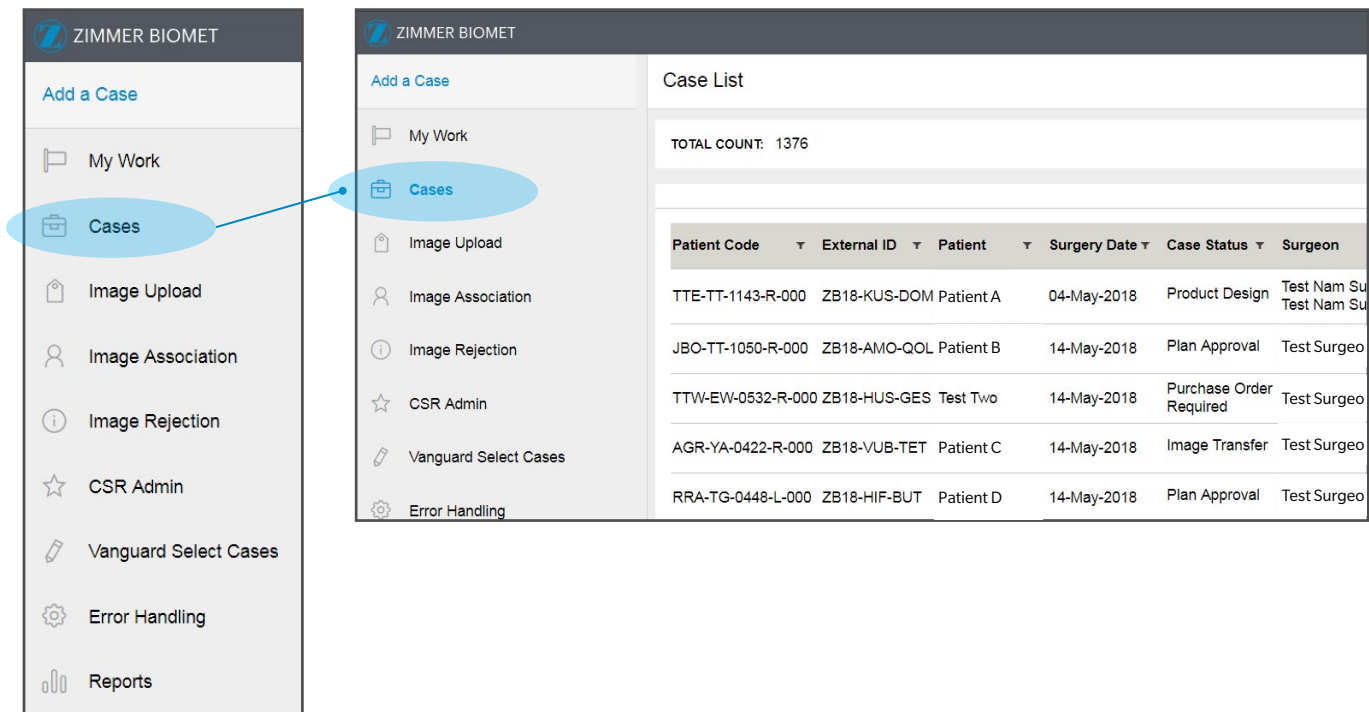


Figure 16

3.4.2 Case Statuses

The Patient Code, External IDs, Name of the Patient, Surgery Date, Case Status, Surgeon, Account, Procedure, and Scan Centers are all visible (Figure 17). Administrators, CSRs, Surgeons, Sales Representatives, and PCCs can select a patient's information to pull up a case and view/edit the case details. Scan Technicians can only see the case lists. Refer to Figure 18 for all "Case Status" definitions.

A total count for the number of cases in each work basket is located at the upper-left of corner of the page.

Case List Refresh list									
TOTAL COUNT: 1376									
Patient Code	External ID	Patient	Surgery Date	Case Status	Surgeon	Account	Procedure	Scan Center	Comments Added
TTE-TT-1143-R-000	ZB18-KUS-DOM	Test Nam Patient Test Nam Patient	04-May-2018	Product Design	Test Nam Surgeon Test Nam Surge+	Test Account US	Knee - Partial (Right)	Scan Center	24-May-2018 08:42
JBO-TT-1050-R-000	ZB18-AMO-QOL	Patient A	14-May-2018	Plan Approval	testsurgeonfem testsurgeonfem	Test Account NAM US	Knee - Partial (Right)	TestScanCenter NAM	
TTW-EW-0532-R-000	ZB18-HUS-GES	Test Two	14-May-2018	Purchase Order Required	Surgeon B	Test Account Canada	Knee - Total (Right)	Scan Center	
AGR-YA-0422-R-000	ZB18-VUB-TET	Patient B	14-May-2018	Image Transfer	Surgeon A	Test Account Canada	Knee - Total (Right)	Scan Center	13-Jun-2018 07:39
RRA-TG-0448-L-000	ZB18-HIF-BUT	Patient C	14-May-2018	Plan Approval	Test Surgeon	testaccount_greerby	Knee - Total (Left)	testscancenter_greerby	30-May-2018 01:56
TTE-DE-0830-L-000	ZB18-XOB-HUG	Patient D	14-May-2018	Image Transfer	DemoSurgeon EMEA	Demo EMEA Hospital	Knee - Total (Left)	DemoScanCenter EMEA	30-May-2018 01:55

Figure 17

You can select the arrow next to "Case Status" or any of the fields on the bar to filter through the cases for a specific case search (Figure 17). Finally, once you've selected an arrow to filter, you can select any of the categories that pertain to your search, or you can type in key words into the "Search Text" box and select "Apply" (Figure 18).

Surgery Date

Case Status

Clear Filter

☐ Cancellation Pending
 ☐ Case Created
 ☐ Case Creation Failed
 ☐ Image Association
 ☐ Image Rejection
 ☐ Image Review
 ☐ Image Transfer

Search Text

Apply

Cancel

Figure 18

Case statuses are as follows:

Internal Case Status	External Case Status	Description
Case Created	Case Created	Case has been added to the system
Case Creation Failed	Case Created	There was an error in the case creation between DCMS and M3S
Image Upload	Image Upload	Images need to be uploaded for the case
Image Upload Failed	Image Upload	There was an error in completing the image upload step
Image Association	In Process	Images need to be associated to a case and transferred to M3S
Image Transfer	In Process	Images are in process of being sent to M3S
Image Transfer Failed	In Process	There was an error in the transfer of images from DCMS to M3S
Image Review	In Process	Images have been received by M3S and are in the Image Review status with Materialise
Image Rejection	In Process	Materialise has rejected images and sent the case back to Zimmer Biomet to accept or reject disposition
Image Rejection Override	In Process	Zimmer Biomet has rejected Materialise's disposition and notified them to proceed with Segmentation <i>Note: This status will only be displayed for a short period of time until Materialise updates the status back to Image Review</i>
Segmentation	e-Manufacturing	The case has moved to 3D Reconstruction and Planning in M3S
Plan Approval	e-Manufacturing	The plan is ready for review and approval
Plan Signature	Plan Pending Signature	The plan has been approved in SurgiCase Planner and requires Surgeon electronic signature to finalize the approval
Purchase Order Required	e-Manufacturing	The case requires a PO before it can move to Product Design and Manufacturing
Product Design	Manufacturing	The case is in the Design stage in M3S
Manufacturing	Manufacturing	Design has completed and the case is in the Manufacturing stage in M3S
Shipped	Shipped	Manufacturing has completed and the case has been shipped
Closed	Closed	The case has been shipped and delivered and is closed
Cancellation Pending	Cancellation Pending	The case is awaiting confirmation from Materialise that the case can be cancelled
Cancelled	Cancelled	The case has been cancelled

Figure 19

3.5 Editing a Case

Limited patient case information can be changed up until manufacturing (Figure 20). If you are an Administrator, CSR, Sales Representative, Surgeon, or PCC, to edit a case:

- 1 Select the “Cases” function, select case for edit, and then select the “Actions” drop down menu in the top right corner.
- 2 Select “Edit Case Details” in the drop down menu.
- 3 Then, edit or cancel the case. Editable information depends on position within the case approval process.

There are multiple fields displayed. You can:

- Enter the Purchase Order (PO)
- Change the Account
- Enter the Patient ID
- Change the Procedure and Surgery Dates
- Change the Bone Model

“Actions”
drop down menu

The screenshot displays the ZIMMER BIOMET DRIVE Case Management System interface. The top navigation bar includes 'Menu' and 'GC' buttons. The left sidebar contains a list of functions: 'Add a Case', 'My Work', 'Cases', 'Image Upload', 'Image Association', 'Image Rejection', 'CSR Admin', 'Vanguard Select Cases', 'Error Handling', and 'Reports'. The main content area shows the 'Manufacturing (IAC-TS-0420-L-000) Image Association' page. A red banner at the top indicates 'The deadline was 1 month 2 days ago'. Below this, a progress bar shows stages: Onboard Case, Image Association (current), Segmentation, Planning, Plan Review, Manufacturing, and Shipping. The 'Case Information' tab is active, displaying fields for Patient Code (IAC-TS-0420-L-000), External ID (ZB18-GID-OKE), ZB Purchase Order No, Status (Image Association), Drive ID (DRIVE-366), Surgeon Name, Account / Hospital (Test Account US), Sales Team / Rep (Test Sales Team NAM), Distributor / Country (Test Team US), Patient Full Name (Image Transfer Test Account Eleven), Patient Date of Birth (08-Apr-1920), Age (98), Gender (Male), and Optional: Internal Hospital Patient ID. The 'PROCEDURE AND TECHNOLOGY' section shows Body Side (Left) and Procedure (Knee - Total). The 'Actions' dropdown menu is open in the top right corner, showing options: 'Edit Case Details', 'Cancel Case', and 'Expedite Case'.

Figure 20

3.5.1 Entering a Purchase Order

The Purchase Order (PO) Number is required to manufacture the surgery guides (Figure 21). If a plan is approved without a PO, the case will not progress until the PO is provided. If you are a Zimmer Biomet Customer Support Team Member, you may contact the Sales Representative to obtain the correct PO number if PO has not been entered in a timely manner.

Edit Case Details

Patient Code
PA_-DU-0329-L-000

Surgeon Name
DemoSurgeon UnitedStates

Account / Hospital

Demo US Hospital ▼

Sales Team / Rep
NAM Demo Sales Team

Distributor / Country
NAM Demo Distributor

Patient Information

Patient First Name
Patient

Patient Date of Birth
15-Mar-1929

Gender
Male

Patient Middle Name

Age
89

Patient ID

ZB Purchase Order No
1-2-3-X-Y-Z

Status
Plan Pending Approval

CASE DETAILS

Last updated by
(13d ago)

Created by
Test

OPEN ASSIGNMENTS

Launch SCP (Plan Review)

DemoSurgeon UnitedStates

ATTACHMENTS (0)

Figure 21

3.5.2 Changing the Surgery Date

You can edit the surgery date by selecting the fields under “Surgery Date” (Figure 22). The surgery date availability date is agreed upon via system logic with Zimmer Biomet and Materialise. A warning will be displayed if the surgery date is not feasible.

If images are uploaded after the due date, the Surgeon will be sent an automated email notifying them that the surgery date was rescheduled to the earliest next available date. The Sales Representative will be copied on this email.

Demo US Hospital

Patient Information

Patient First Name
Patient
Patient Date of Birth
15-Mar-1929
Gender
Male
Body Side
Left
Procedure
Knee - Total
Surgery Date
June 18 2018

Patient Middle Name

Age
89
Patient ID

Patient Last Name
A

Left
Modality: CT

checking this box you are indicating that you would like to model with your order. If you are ordering a Vanguard or in a 100% bone model country, you will receive a bone order regardless of whether this box is checked or not.

OPEN ASSIGNMENTS

Launch SCP (Plan Review)
DemoSurgeon UnitedStates

ATTACHMENTS (0)

+ Attach new

COMMENTS

+ Add Comments

Figure 22

3.5.3 Changing the Procedure

The procedure type can be edited, and it is located under “Procedure” (Figure 23). A Surgeon can change the procedure type up until the plan is approved.

Note: Changing a procedure in DCMS will be limited once the case has been created; but it can be changed in the SurgiCase Planner until the plan has been approved. Once a plan is approved, the procedure cannot be changed.

Note: This includes changes for surgical procedures, not surgical preferences (i.e. cut blocks). To change Surgeon preferences, access SurgiCase Planner within the planner software.

The screenshot displays the SurgiCase Planner interface. On the left, under 'Patient Information', fields for Patient First Name, Patient Middle Name, Patient Last Name, Patient Date of Birth (15-Mar-1929), Age (89), Gender (Male), and Patient ID are visible. The 'Procedure' dropdown menu is open, showing options: 'Knee - Total', 'Select...', 'Knee - Total', and 'Knee - Partial'. The 'Body Side' is set to 'Left'. Below this, there are checkboxes for 'Guide' and 'Bone Model', and a 'Modality: CT' field. On the right, the 'OPEN ASSIGNMENTS' section includes a 'Launch SCP (Plan Review)' button and an 'ATTACHMENTS' section with a '+ Attach new' button. The 'COMMENTS' section has a '+ Add Comments' button.

Figure 23

3.5.4 Viewing/Changing Shipping Information

By design, shipping addresses will default to the distributorship address for the United States (NAM) and the country’s specific location for Canada (NAM), EMEA and APAC (Figure 24). Due to logistical optimization, this cannot be changed for Canada, EMEA, or APAC. If you are located in the United States, you can change the shipping address in the “Edit Case Details” function up until manufacturing.

Sales Representatives will be sent an email once the product has shipped, and PCCs will be copied on that email. The shipping tracking number will be a hyperlink within the email.

The screenshot shows the 'Shipping Address' form. It includes fields for 'Attention' (NAM Demo Distributor), 'Name' (NAM Demo Distributor), 'Country' (United States), 'Street 1' (123 ABC Street), 'Street 2', 'Street 3', 'State/Province' (Michigan), 'City' (Detroit), and 'ZIP/Postal Code' (48127). There are 'Cancel' and 'Submit' buttons at the bottom.

Figure 24

3.5.5 Adding/Viewing Comments and Attachments

If you are an Administrator, CSR, Sales Representative, Surgeon, or PCC, you can add and view comments.

To add a comment:

- 1 Select “Add/View Comments” button located at the lower right-hand corner (Figure 25).
- 2 Type their public or private comments into the text box (Figure 26).
- 3 Select “Post” on the left-hand side.

Note: Private comments are for internal communications between the Zimmer Biomet Team and Materialise Customer Support. Public comments are communications for anyone who has access to the case. The comments section will automatically default to private comments (Figure 26).

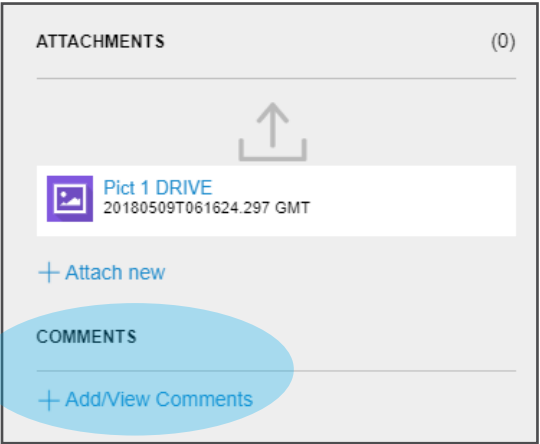


Figure 25

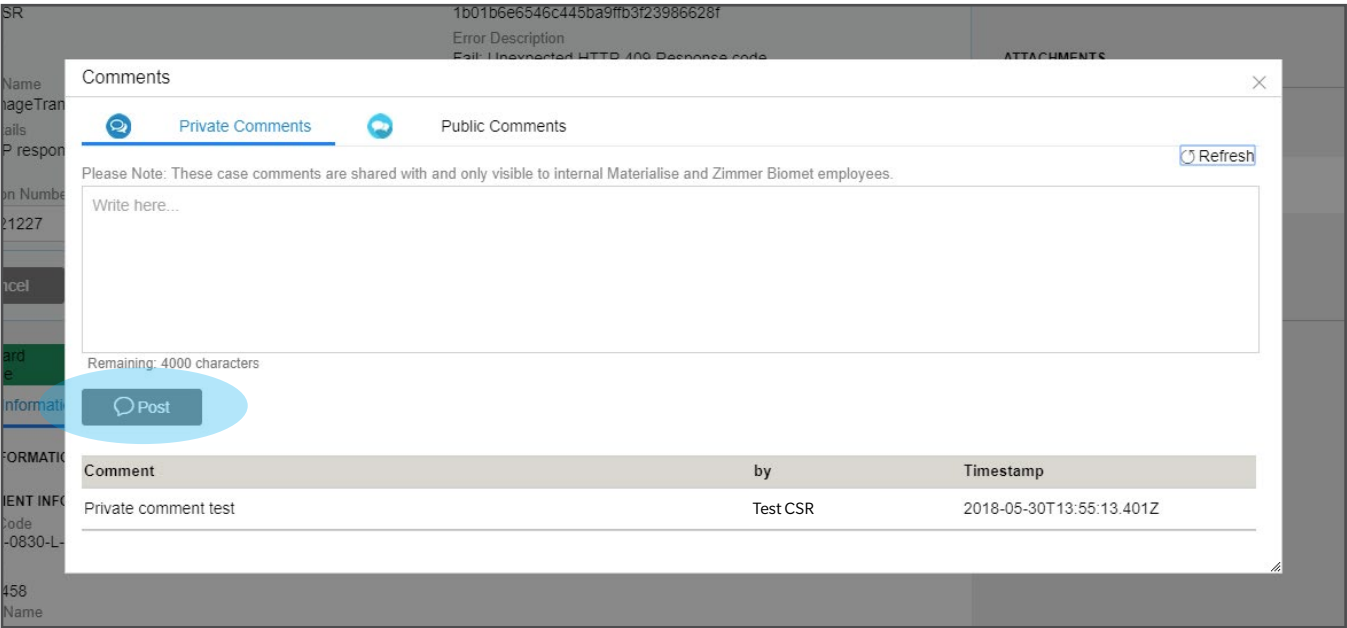


Figure 26

To add attachments to a case:

- 1 Select the “Attach new” button located in the lower right-hand corner (Figure 27).
- 2 Select either “File from device” or “URL” to attach file.

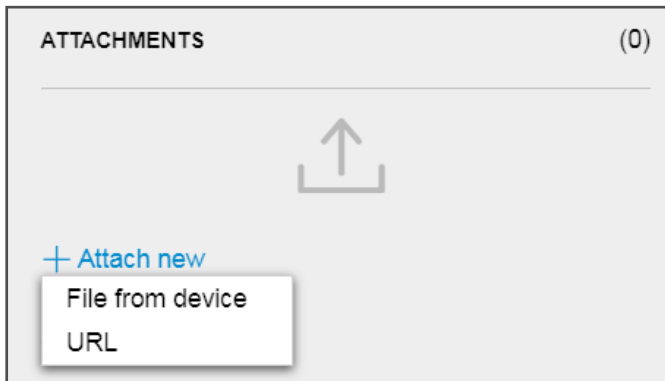


Figure 27

- 3 For “File from device” option:
Either select “Select file(s)” or drag the file to “Drag and drop files here” (Figure 28).

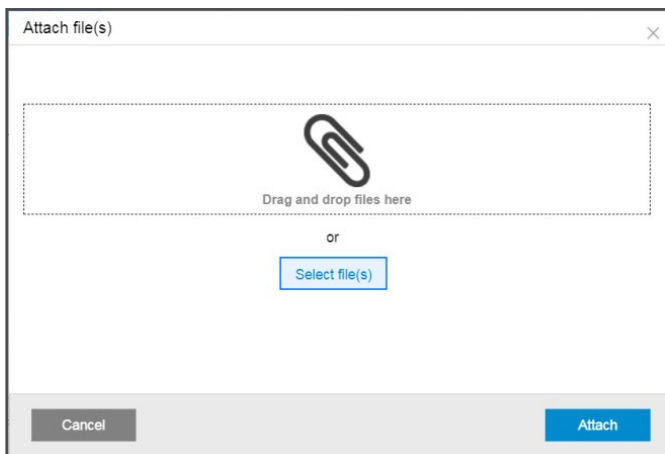


Figure 28

- 4 For “URL” option:
Type in a subject under “Subject” and type in a URL under “URL” (Figure 29) and select “Submit.”
Both fields are required.

A screenshot of a form titled "Attach a link". It contains three input fields: "Subject" (with a red asterisk indicating it is required), "URL" (also with a red asterisk), and "Attachment Category" (a dropdown menu currently showing "URL"). A red error message "Value cannot be blank" is visible next to the URL field. At the bottom are "Cancel" and "Submit" buttons.

Figure 29

3.6 Cancelling Cases

Administrators, CSRs, Sales Representatives, Surgeons, and PCCs can cancel cases. Select “Cancel Case” from the drop down menu on the right side of the screen, if you wish to cancel a case (Figure 30).

When a cancelled case is in the “Image Upload” phase, the Scan Technician will be notified. The Sales Representative, Surgeon, and PCC will be copied on the email. A case may be cancelled up until manufacturing.

To cancel a case:

- 1 Select **required** reason for cancellation from the drop down menu (Figure 31).
- 2 Select “Submit.”
- 3 MTLS will be notified that a request for cancellation has been submitted. MTLS will be responsible for accepting or rejecting the request for cancellation. The case will remain open until MTLS has accepted the cancellation.

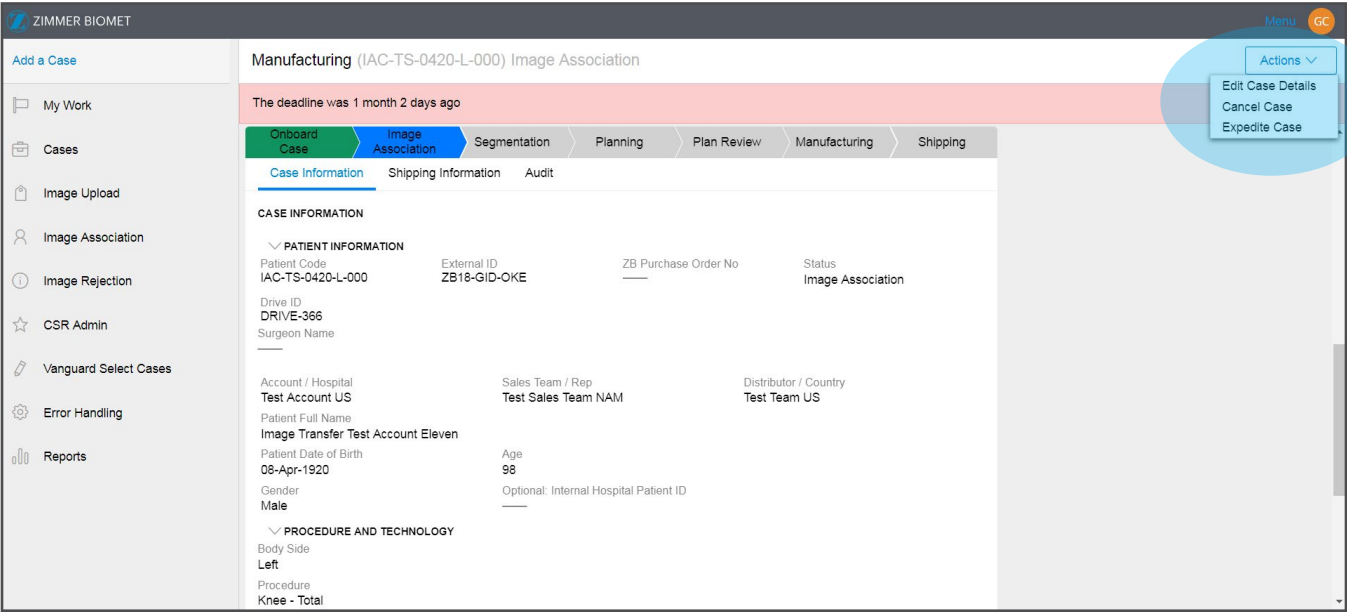


Figure 30

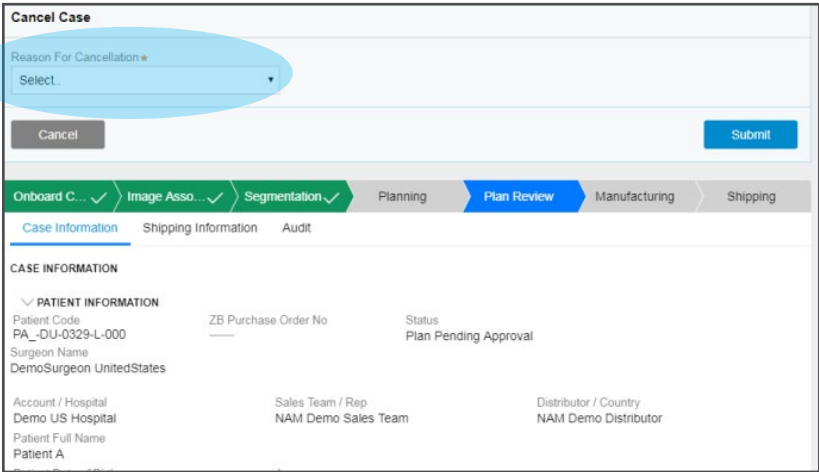


Figure 31

3.7 Shipping Information

You can locate shipping information under the “Shipping Information” tab (Figure 32). This tab can be found once a case is in the “Shipping” phase. There will not be a tracking number until items have been shipped.

Onboard CaseImage AssociationExceptionSegmentationPlanningPlan ReviewManufacturingShipping

Case InformationProduct InformationShipping InformationAudit

SHIPPING INFORMATION

Shipping Address

Attention
Test US Distributor

Name
Test Team US

Country
United States

Street 1
123 Demo Lane

Street 2

City
Warsaw

Street 3

ZIP/Postal Code
46582

Tracking Number

Figure 32

3.8 Reports: Closed Cases

If you are an Administrator, CSR, Sales Representative, Surgeon, or PCC, you can access closed cases by:

- 1 Selecting “Reports” (Figure 33).
- 2 Selecting “All Reports.”
- 3 Selecting “Closed Cases Volume.”

Note: If closed cases cannot be seen, then disable the pop-up blocker.

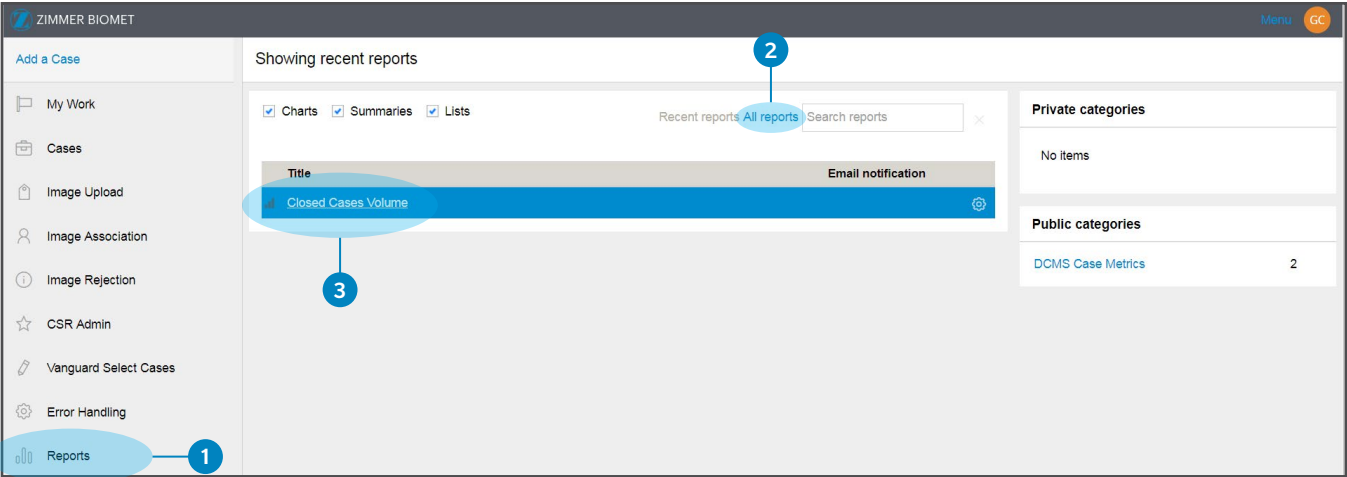


Figure 33

Once you select “Closed Cases Volume,” it will open in a new window, and you will:

- 1 Select date range, and select “Apply Filters” (Figure 34) (cases can only be filtered for a month at a time).
- 2 Select the “Knee” line.

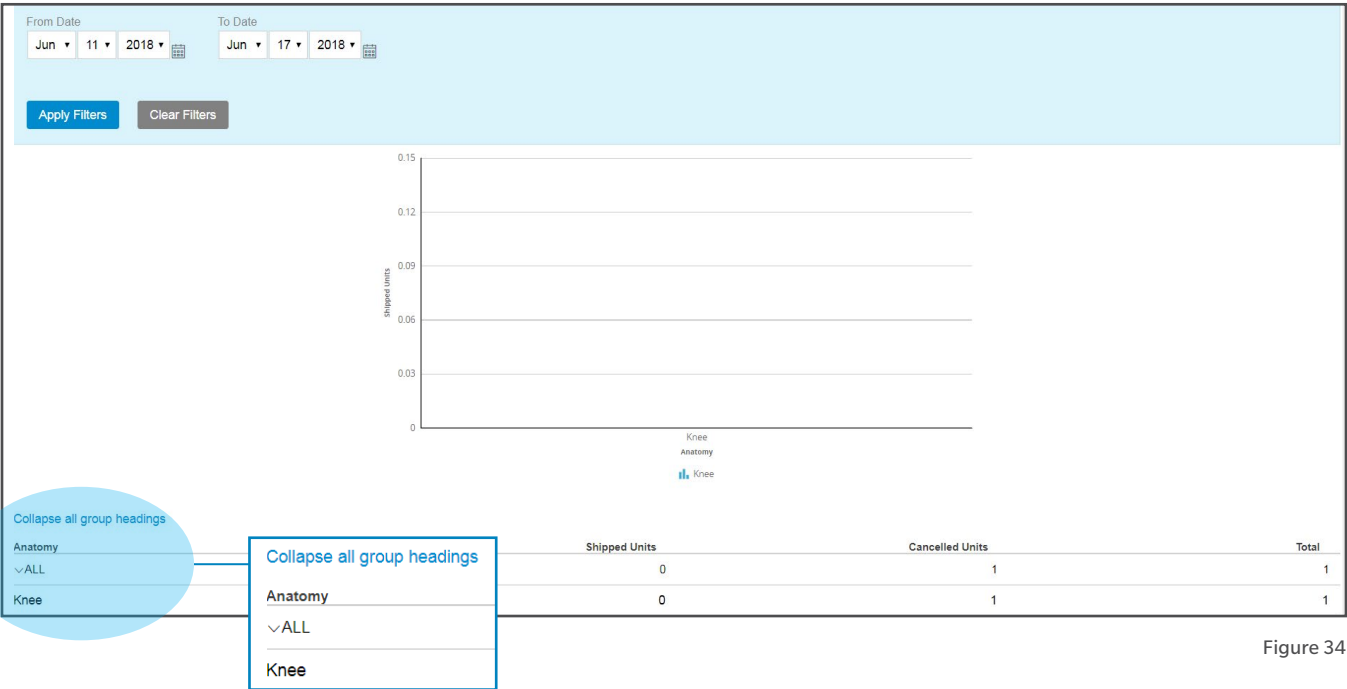


Figure 34

Note: When selecting the “Knee” line, closed cases will appear.

A list of cases for date range selected will be displayed. You can do one of the following:

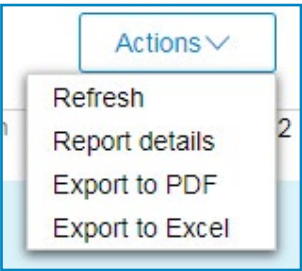
- 1 Select “Actions” to export closed case reports to PDF or Excel (Figure 35).

OR

- 2 Select a single case, and a report will open in DCMS (Figure 36).

Note: The DCMS Case Screen is behind the report pop-up.

You will need to minimize the report or select the browser window.



Closed Cases Volume DrillDown

Generated on June 18, 2018 13:02:51

Closed Cases Volume > Knee

Displaying 1 record

Patient Code	Lot No.	Anatomy	Surgery Date ^{↑2}	Procedure	Tracking No.	Shipped Date ^{↑1}	Status	Reason
TTE-YS-0888-L-000	DRIVE-1248	Knee	13-Jul-2018	Knee - Total			Cancelled	

Figure 35

Onboard Case > Image Association > Segmentation > Planning > Plan Review > Manufacturing > Shipping

Case Information | Product Information | Shipping Information | Audit

CASE INFORMATION

▼ PATIENT INFORMATION

Patient Code TET-DS-1030-R-000	ZB Purchase Order No 132132	Status Closed	Drive ID DRIVE-1047
Surgeon Name Duplicate Surgeon2			
Account / Hospital Test Account US	Sales Team / Rep NAM Demo Sales Team		Distributor / Country NAM Demo Distributor
Patient Full Name Test 0005ETE ETE			
Patient Date of Birth 13-Oct-1930	Age 87		
Gender Female	Optional: Internal Hospital Patient ID _____		

Figure 36

4. Surgeon Manual

4.1 Launch Web Planner

The Web Planner (e.g. SurgiCase Planner) can be launched when it is time to view the patient case plans (Figure 37).

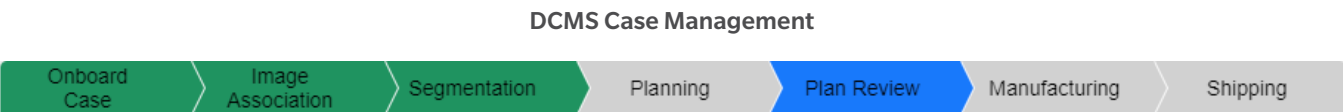


Figure 37

- 1 Select “My Work” (Figure 38).

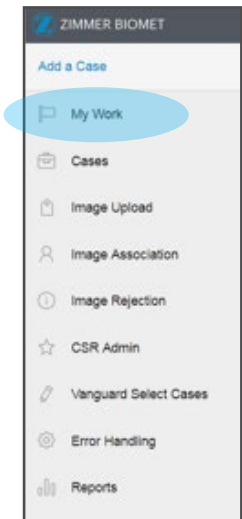


Figure 38

- 2 Select chosen patient information line (Figure 39).

TOTAL COUNT: 2						
Patient Code	Patient	Surgery Date	Case Status	Surgeon	Account	Procedure
PA_DU-0329-L-000	Patient A	18-Jun-2018	Plan Pending Approval	DemoSurgeon UnitedStates	Demo US Hospital	Knee - Total (Left)
CEV-DU-0883-L-000	Patient B	06-Jul-2018	Plan Pending Approval	DemoSurgeon UnitedStates	Demo US Hospital	Knee - Total (Left)

Figure 39

- 3 Select “Actions” > “Review Plan” (Figure 40).

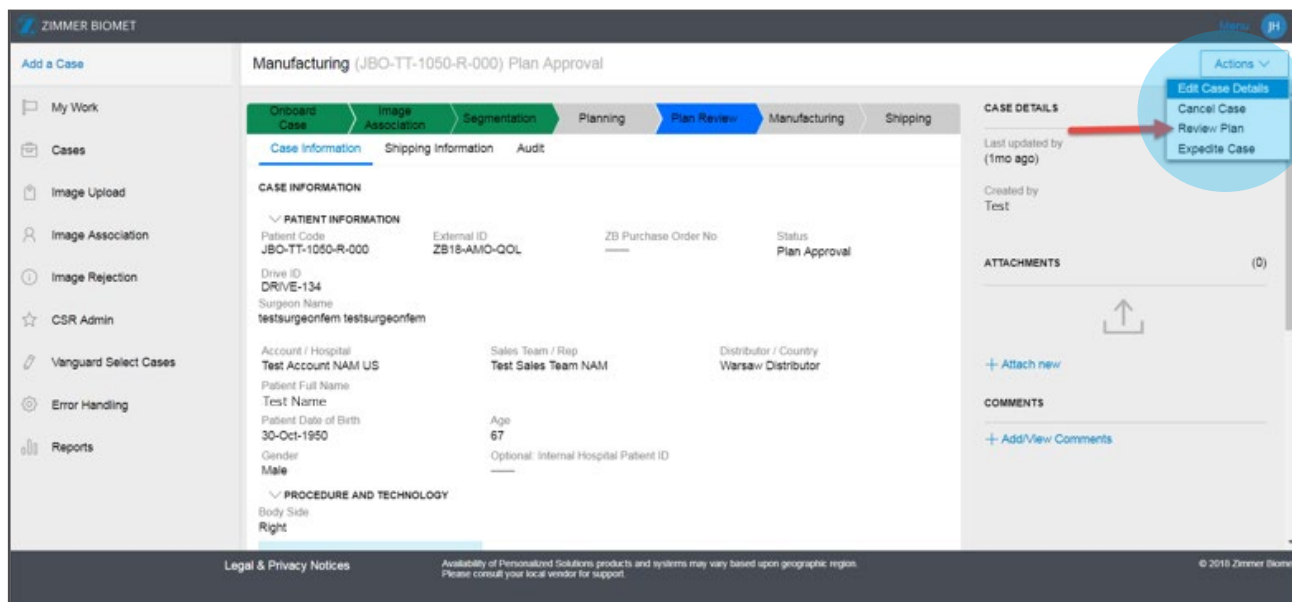


Figure 40

- 4 Select “Click Here to Launch Web Planner” to launch the SurgiCase Planner (Figure 41).

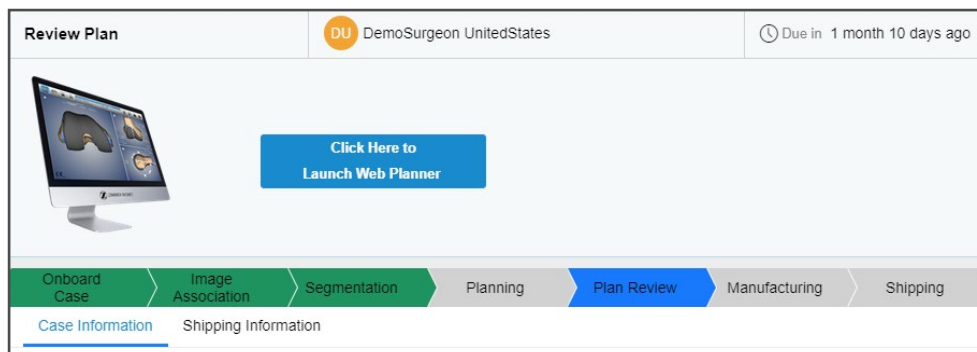


Figure 41

- 5 When a case is ready for approval, the Surgeon will need to approve the case through the SurgiCase Web Planner.

4.2 Approving a Case

Only a Surgeon has the ability to approve a case. Please note: due to IT, Compliance, and Regulatory requirements, all cases must be approved by a Surgeon regardless of the legacy system, **the default approval option is no longer available.**

You will be sent an email notification when a case is ready for approval and requires an e-signature. The Sales Representative and PCC will be copied on these emails. Another email will be sent to you if the case approval needed to be re-evaluated and is ready for you to approve again. The Sales Representative and PCC will also be copied on this email.

Please see the SurgiCase Planner Manual for detailed instructions.

- 1 Within the SurgiCase Planner, apply modifications, then select “Approve Plan” (Figure 42).

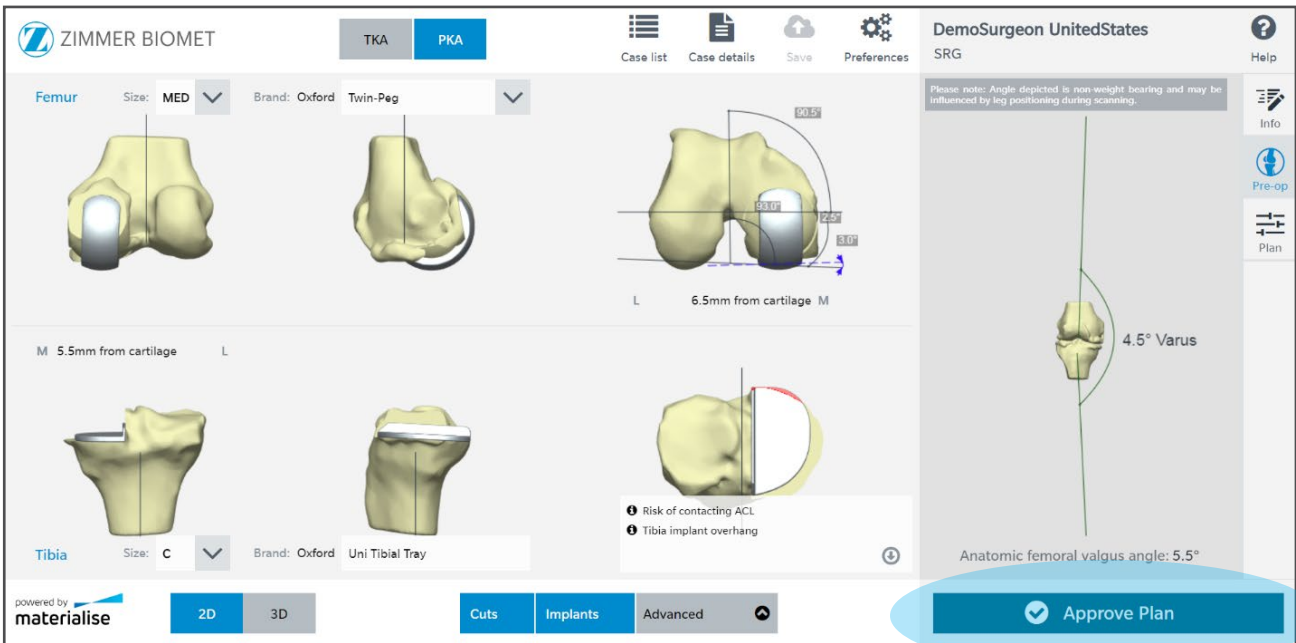


Figure 42

If you are a Surgeon, once you select “Approve Plan,” a warning will appear on the screen, if you need to look over the plan again (Figure 43).

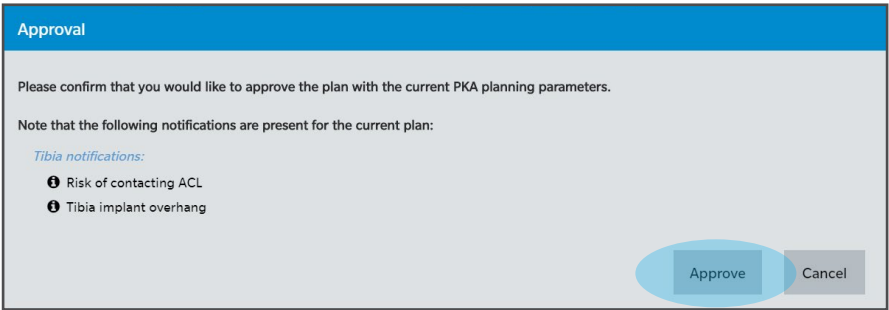


Figure 43

Once you select “Approve,” you will be routed to the screen below.

Note: It is very important that you allow the screen to load and do not exit out of the page, so that you can be taken to the next phase of approval (Figure 44).

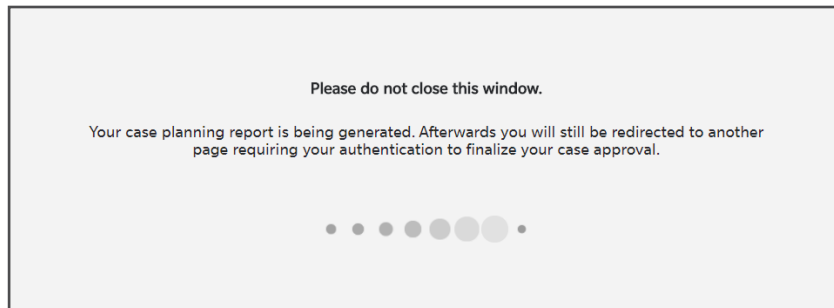


Figure 44

2 You will be taken back to “Case Details” (Figure 45).

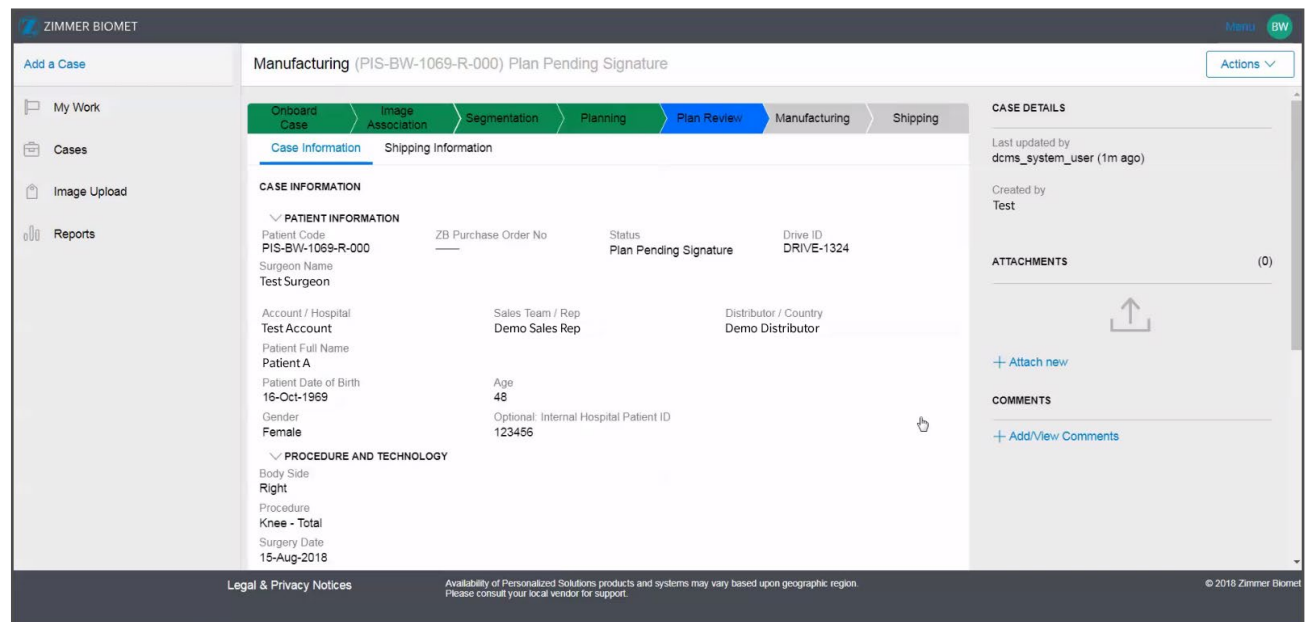


Figure 45

- 3 Select “Actions” > “Capture Signature” (Figure 46).

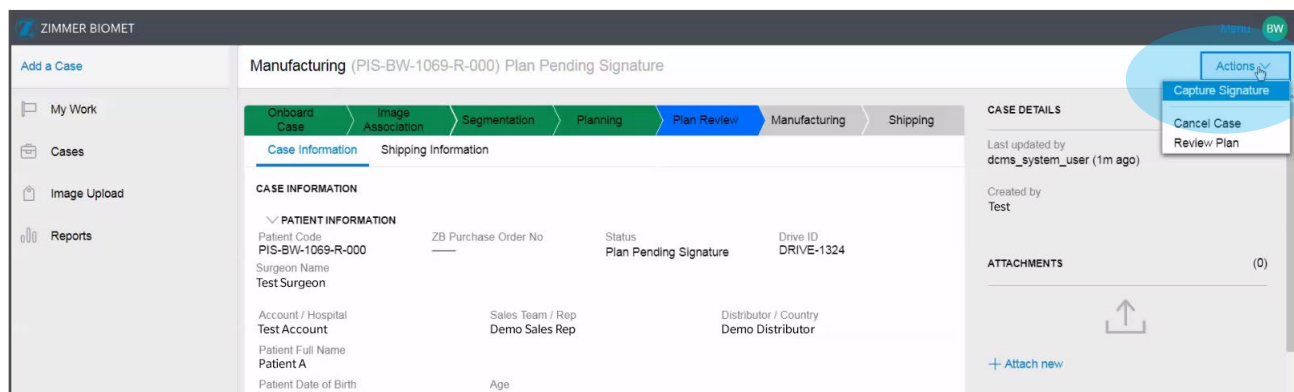


Figure 46

- 4 Enter your password and select “Submit Signature” button. Your email address will be pre-populated (Figure 47).

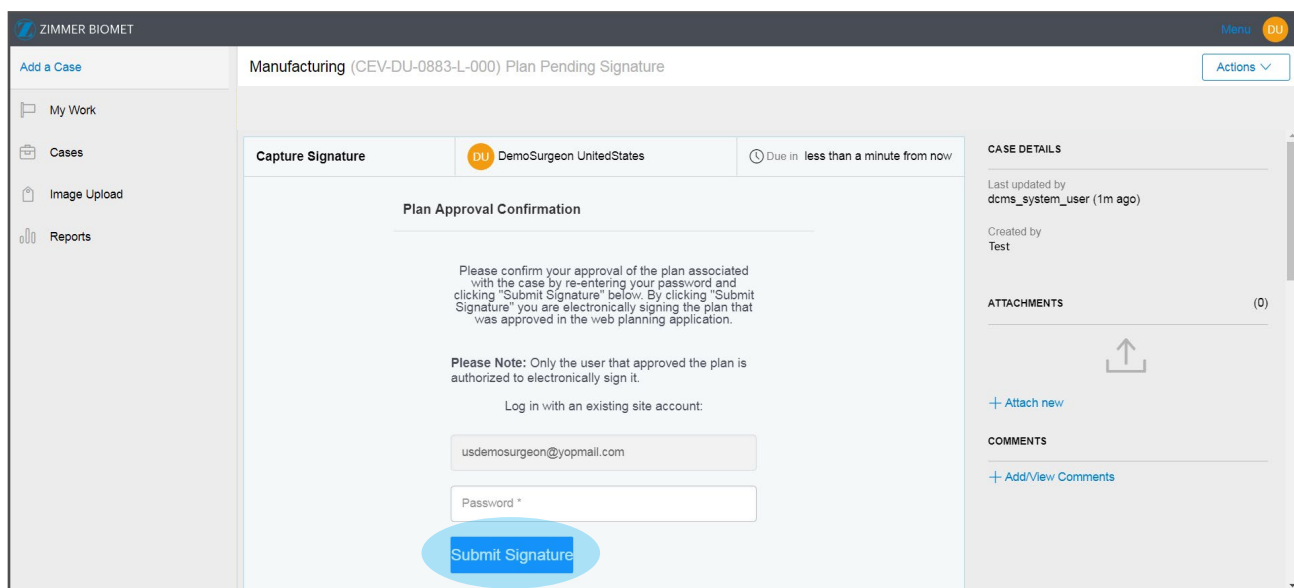


Figure 47

Once you select the “Submit Signature” button, you will be taken back to patient’s information page. You will need to submit a captured signature, which is located at the top of the page (Figure 48).

*Note: You must enter your password to approve a case due to FDA CFR part 11 electronic signature requirements. If you select approve, but do not enter a password, the **case is not approved**, and you will receive an email notifying you that the case is awaiting an electronic signature. You will receive a notification an hour after you do not finish the approval process.*



Figure 48

4.3 Surgeon PDF

You can access the Surgeon PDF via DCMS when a case has been approved. The Surgeon PDF is located under attachments on the right-hand side of the screen (Figure 49). Surgeon PDFs will now show any changes made to the case.

Onboard Case

Image Association

Segmentation

Planning

Plan Review

Manufacturing

Shipping

Case Information

Product Information

Shipping Information

Audit

CASE INFORMATION

▼ PATIENT INFORMATION

Patient Code

PGR-QN-1020-R-000

External ID

ZB18-IGI-CIP

ZB Purchase Order No

PetterG1234

Status

Product Design

Drive ID

DRIVE-1368

Surgeon Name

QATatia NAMSurgeon

Account / Hospital

Test Account NAM US

Sales Team / Rep

QATatia NAMteam

Distributor / Country

Distbr America

Patient Full Name

Patient A

Patient Date of Birth

05-Oct-1920

Age

97

Gender

Male

Optional: Internal Hospital Patient ID

▼ PROCEDURE AND TECHNOLOGY

Body Side

Right

Procedure

Knee - Total

Surgeon Date

CASE DETAILS

Last updated by


Test

Created by


Test

ATTACHMENTS


(4)

 Test Attachmentpdf


20180615T094527.878 GMT

 TestAttachmentpdf

20180615T094004.985 GMT

 Test Attachmentpdf

20180615T093030.592 GMT

 ZB18-IGI-CIP_Report pdf

20180614T183233.037 GMT


+ Attach new

COMMENTS

+ Add/View Comments

Figure 49

An example of the new Surgeon PDF format is featured below (Figures 50 and 51).



ZIMMER BIOMET

1 of 2

Knee Planning Report

Case ID:

Procedure:

Surgery Date:

Patient:

Surgeon:

PGR-QN-1020-R-000

MRI TKA R Knee

03 Sep 2018

Patient A

Surgeon A

Implant and Cut Block Information

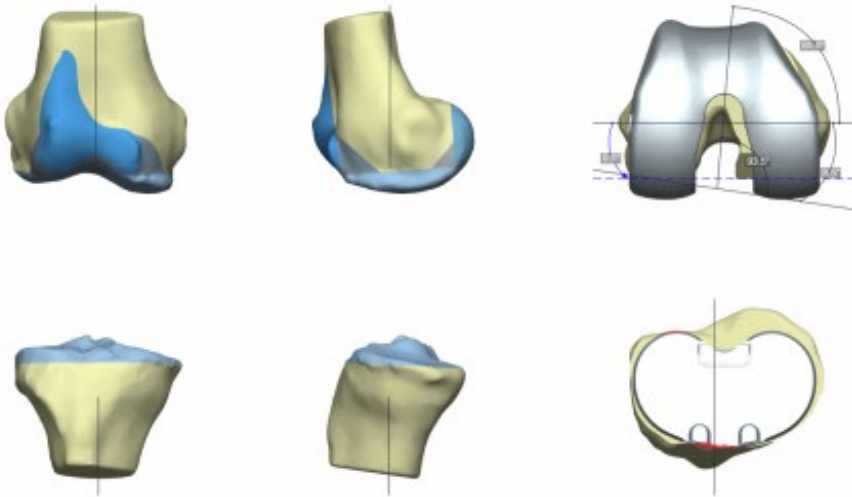
Implant Family:	Vanguard		
------------------------	-----------------	--	--

FEMUR

Implant:	CR	Femur Size:	75
Instrumentation:	PREF		
Distal Cut Block:	Premier Fixed Distal Resector	32-487002	
4in1 Cut Block:	Vanguard Femoral Block 75mm	32-4871-07-0	

TIBIA

Implant:	I-Beam	Tibia Size:	75
Proximal Cut Block:	Premier Tibial Resection Head, Right	32-487555	



Pre-op Alignment*

Knee Varus/Valgus:	1.0° Varus
Femoral Valgus Angle:	6.0° Varus

*Please note: alignment is estimated based on the patient MRI scan (non-weight bearing)

Materialise NV | Technologielaan 15 | 3001 Leuven | Belgium | materialise.com

USA: +1-734-259-6669 | Europe: +32-16-744-930 | Asia-Pacific: +603-772-41-415

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powered by




Figure 50

Knee Planning Report

Case ID: PGR-QN-1020-R-000
Procedure: MRI TKA R Knee
Surgery Date: 03 Sep 2018
Patient: Patient A
Surgeon: Surgeon A

Planned Surgery Parameters

Femur	Approved Plan		Default Plan	
Size	75		75	
Distal Resection [mm]	M: 11.0	L: 6.0	M: 11.0	L: 6.0
Varus(+)/Valgus(-) [deg]	0.0		0.0	
Flexion(+)/Extension(-) [deg]	4.5		4.5	
Posterior Resection [mm]	M: 10.0	L: 3.5	M: 10.0	L: 3.5
Rotation Reference	Epicondylar Axis			
Internal(-)/External(+) Rotation [deg]	0.0		0.0	

Tibia	Approved Plan		Default Plan	
Size	75		75	
Proximal Resection Reference	Lateral High (with limit on Medial Low)			
Proximal Resection [mm]	M: 1.0	L: 10.0	M: 1.0	L: 10.0
Varus(+)/Valgus(-) [deg]	0.0		0.0	
Posterior Slope [deg]	3.0		3.0	
AP axis	Medial third axis			
Internal(-)/External(+) Rotation [deg]	0.0		0.0	

Case Notifications:

The posterior axis is rotated externally by more than 6 deg.
 Tibia implant overhang.

Personal Planning Notes:

No comments.

In case of questions, please contact Zimmer Biomet through +1-574-371-3710 or by email through personalizedsolutions@zimmerbiomet.com

Figure 51

4.4 Post Approval

You can select the “Cases” function and select a case. This will provide the case details that have been updated to include the product information. The “Product Information” tab is present on the case but only gets populated with data once the Surgeon approves the case, and it is in product design (Figure 52).

Note: The Surgeon can navigate to case information, product information, shipping information, and audit (case history).

Onboard CaseImage AssociationExceptionSegmentationPlanningPlan ReviewManufacturingShipping

Case InformationProduct InformationShipping InformationAudit

Implants

Implant Brand

Implant Construct Guide

Femoral Implant Size

80

Tibial Implant Size

87

Technology & Instrumentation

Guide Type

Pin Position

Femoral Resection Block Distal

:

Lot Number

ZB18ZUXROJ

Expiration Date

2018-09-23T00:00:00

Part Number

42-422567

Femoral Resection Block 4in1

:

Tibial Resection Block

RD-140512 : Microplasty Tibial Resection Head, Right

Figure 52

5. CSR Manual

5.1 Image Association

To associate images:

- 1 Open “Image Association” queue to view cases awaiting images to be matched.
- 2 Locate the case images on the image portal and match them to the case.
- 3 Verify the Patient ID and Accession Number through DICOM data in Image Upload System.
- 4 Select the “Image Association” function (Figure 53).
- 5 Type in the “Patient ID” and then the “Accession Number” (Figure 54).

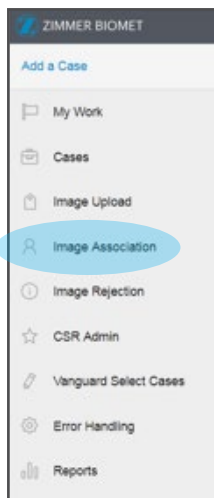


Figure 53

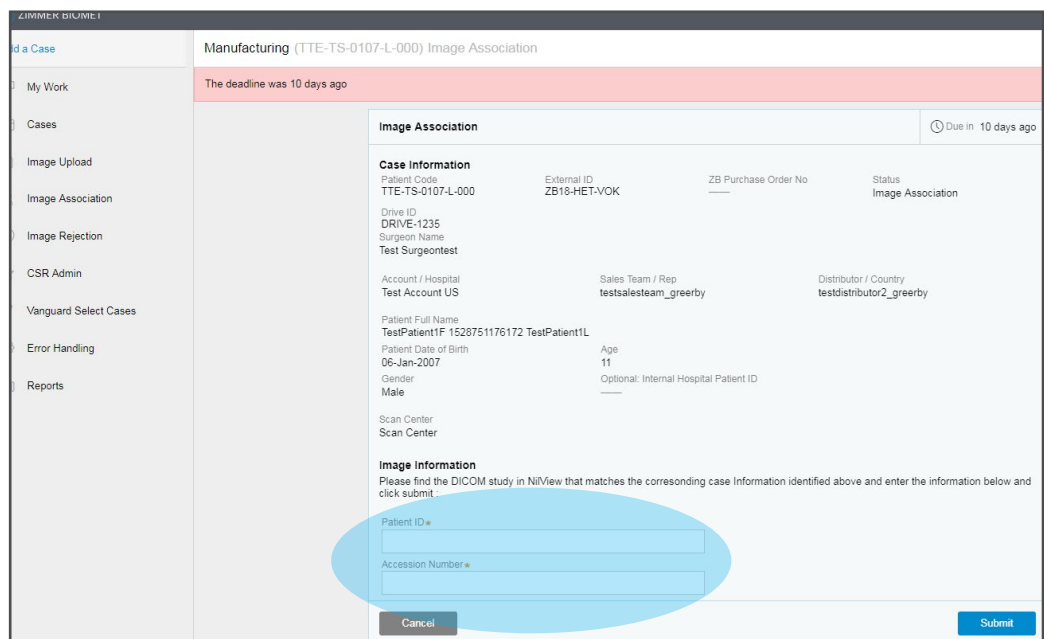


Image Association Due in 10 days ago

Case Information

Patient Code	External ID	ZB Purchase Order No	Status
TTE-TS-0107-L-000	ZB18-HET-VOK		Image Association
Drive ID DRIVE-1235			
Surgeon Name Test Surgeontest			
Account / Hospital	Sales Team / Rep	Distributor / Country	
Test Account US	testsalesteam_greerby	testdistributor2_greerby	
Patient Full Name TestPatient1F 1528751176172 TestPatient1L			
Patient Date of Birth	Age	Optional: Internal Hospital Patient ID	
06-Jan-2007	11		
Gender			
Male			
Scan Center			
Scan Center			

Image Information

Please find the DICOM study in NiView that matches the corresponding case Information identified above and enter the information below and click submit.

Patient ID*

Accession Number*

Cancel Submit

Figure 54

5.2 Image Rejection

To review rejected images:

- 1 Select the “Image Rejection” function on the left-hand side of the screen (Figure 55).
- 2 Select a case, review the images associated with that case, and leave a Review Comment (Figure 56).
A Technical Specialist will review why the images have been rejected, and they will work with a Sales Representative, a Scan Technician, or other sources to resolve the problem.

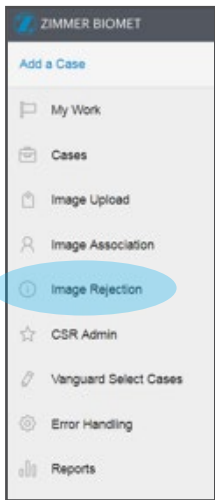


Figure 55

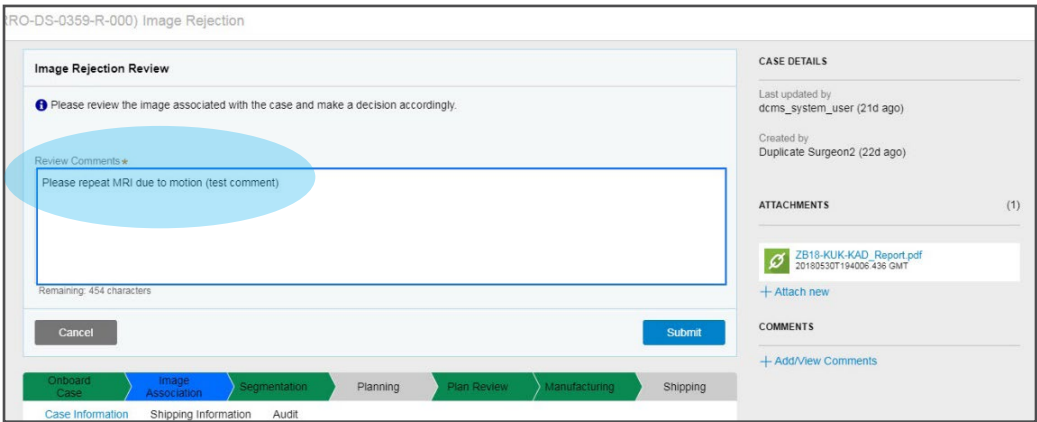


Figure 56

- 3 Attach files related to the case (Figure 57).
- 4 Submit the case review (Figure 58).

Note: Private comments are for internal communications between the Zimmer Biomet Team and Materialise Customer Support. Public comments are communications for anyone who has access to the case. The comments section will automatically default to private comments.

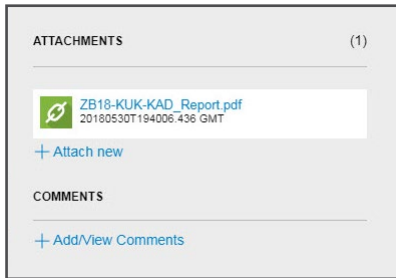


Figure 57

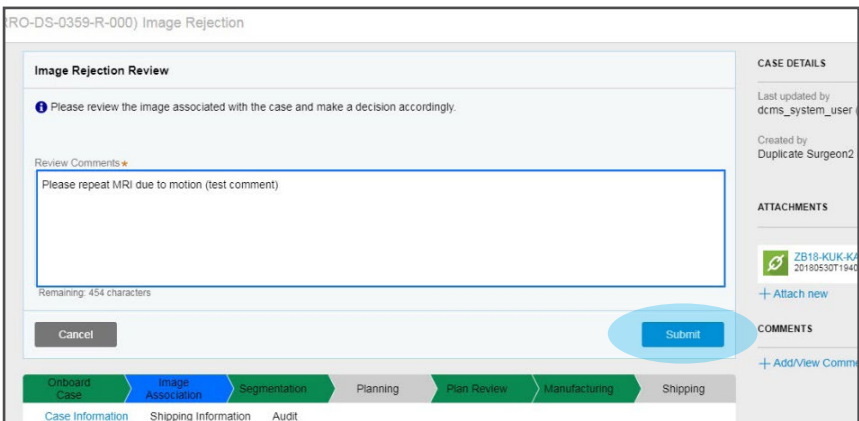


Figure 58

5.3 Expediting a Case

To expedite a case:

- 1 Leave a comment for Materialise requesting to expedite case. They will advise whether or not they can do the case within 24 hours and as we get information back, accept or reject the rush case.
- 2 Select “Expedite Case” from the “Actions” dropdown menu (Figure 59).

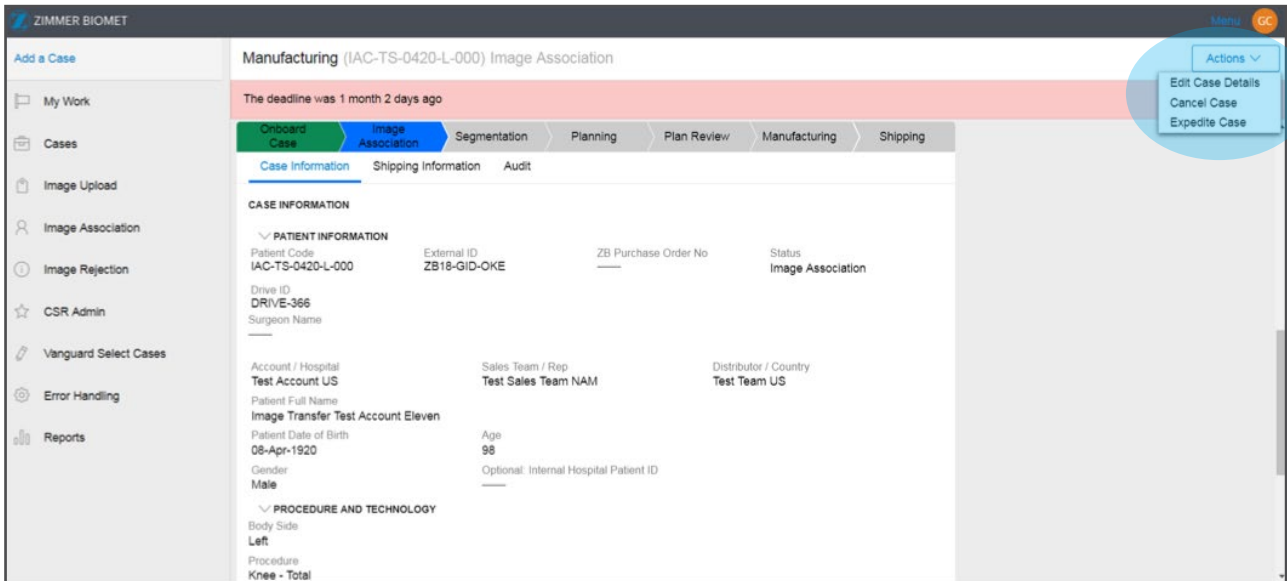


Figure 59

- 3 Add the surgery date (“Surgery Date”) and an explanation (“Comment”) (Figure 60). These fields are required.

A screenshot of the 'Expedite Case' form in the ZIMMER BIOMET system. The form is titled 'Manufacturing (ZZX-QN-0218-L-000) Image Upload'. It features a red banner at the top indicating 'The deadline was 17 days ago'. Below the banner, there's a section titled 'Expedite Case' with a clock icon and 'Due in 17 days ago'. A note states: 'Note: Have you received approval from Materialise and confirmed surgery date before proceeding?'. The 'Surgery Date' field is required and shows a date picker set to August 24, 2018. The 'Comment' field is also required and contains the text: 'As requested your case has been moved up to 24-Aug-2018. Further changes will not be allowed for this case.' Below the comment field, it says 'Remaining: 393 characters'. At the bottom, there are 'Cancel' and 'Submit' buttons. The progress bar at the bottom shows the current step as 'Image Association'.

Figure 60

- 4 Select “Submit.”
Note: There is a current process in place for rush requests, please review with Customer Support prior to completing this request to MTL.

6. Relationship HUB

CSR's will create accounts for new DCMS users who do not have accounts with the legacy SOMS or ZOMS Portals. There is a two-part process to create a new account. A CSR must build a new user profile through Relationship HUB located in DCMS. Then, once they receive an invitation to join DCMS, the new user must complete the registration process. Unlike the legacy SOMS and ZOMS portals, there is no registration hierarchy. Any new user can be registered into Relationship HUB at any point in time. Users no longer need to wait for other users to register new accounts. In addition, profiles within Relationship HUB can be edited at any point in time.

6.1 Creating a New Account (CSR/Administrator Role)

- 1 Log into DCMS, select "Switch apps," and then select "RH Management" (Figure 61).

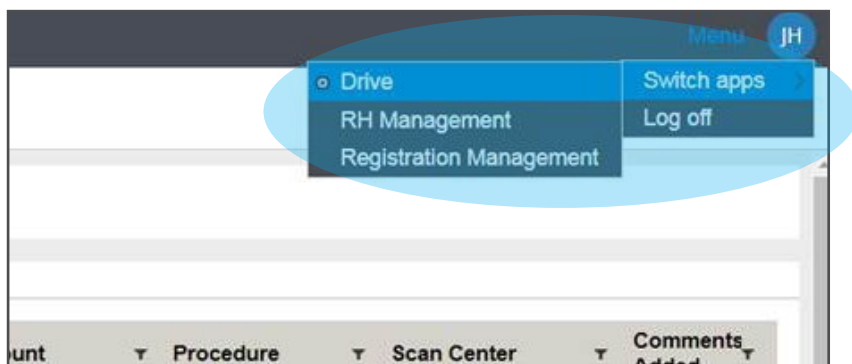


Figure 61

- 2 Select the user role or entity type located on the left-hand side of the screen. You have the ability to create new DCMS accounts for Surgeons, Accounts (Hospitals), PCCs, Distributors, Sales Teams, Sales Representatives, Scan Centers, and Scan Technicians (Figure 62).

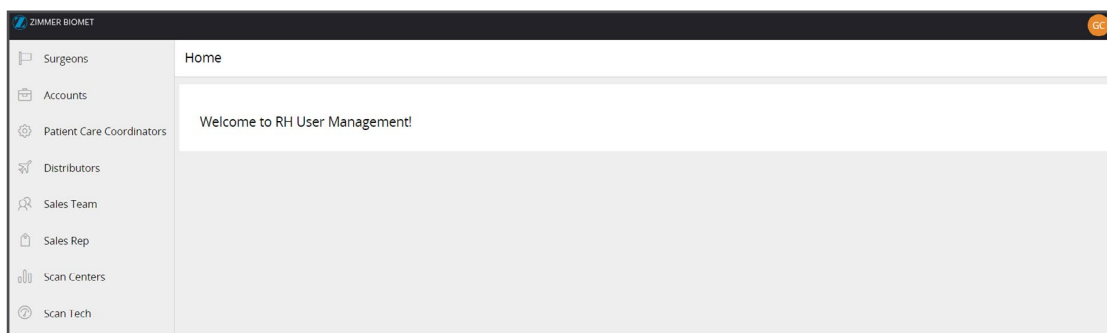


Figure 62

Search and Create Record

To Search and Create Surgeon records in Relationship HUB, select the Surgeon role from the side panel of the application (Figure 63).

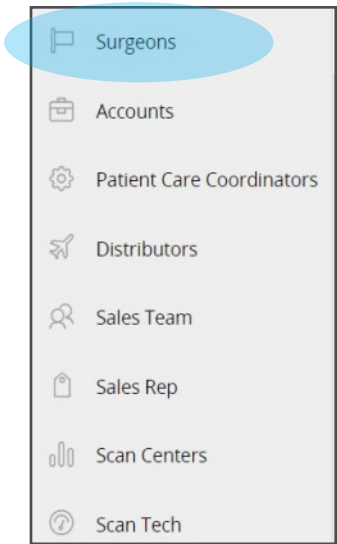


Figure 63

Search for Surgeon Record

- 1 Search for a Surgeon by selecting their region and entering in their first and/or last name. Then, select the “Search” button below (Figure 64).
- 2 The list of results that match the criteria are displayed in the Search Results section (Figure 65). If there are results, select “Open” to review result information. If this information does not match, please verify the selected region. If desired results are not found, create a new Surgeon record.

Surgeons Management

Region★
North America

Country

First Name

Last Name

Clear

Search

Add

Figure 64

Surgeons Management

Region★
Asia Pacific

Country

First Name
apac

Last Name

Clear

Search

Add

Search Results

First Name	Last Name	Email	City	State/Province	Country	Select
APAC	SRG	apac.srg@mailinator.com	Warsaw	Tasmania	Australia	Open
Apac_Prod	Surgeon	Apac_Prod_Surgeon@yopmail.com	Belrose	New South Wales	Australia	Open

Figure 65

Create Surgeon Record

1 Once it has been confirmed that the user is not already in the system, select the “Add” button (Figure 66). The system does not currently check for duplicate entries, so best practice is to perform a search on the user first to make sure that they do not already exist before creating them.

2 Enter all of the required information marked with an asterisk, and select “Save” to create the record (Figure 67).

Note: If a surgeon is allowed to order Vanguard Select, then the “PSF Allowed” flag must be selected (Figure 67). If unknown, please verify with Sales Representatives.

3 Once the record is created, the Surgeon can be associated with the user and entities identified below by selecting the “Add” button under each user/entity tab.

Note: At this point, a Surgeon can be invited to access DCMS, but they will not be able to create a case until the required associations identified below are complete (Figure 68):

- Account (Hospital): Required
- Sales Team: Required
- Patient Care Coordinator: Optional
- Scan Centers: Required
- Product: Automatically populated based on the Surgeons’s country, but if a Surgeon is trained to use Oxford or Vanguard M, then this must be selected in this tab.
- Preferences: Required

Surgeons Management

Region*
North America

Country

First Name

Last Name

Clear Search Add

Figure 66

Surgeons Management

North America

First Name

Last Name

Clear Search Add

Surgeon Details

First Name* Middle Name Last Name* IAM ID

Prefix Suffix PSF Allowed ☒

Email* Phone Attention ID

Street1* Street2 Street3 City*

Country* State/Province* Postal Code* Region

Cancel Save

Figure 67

Surgeon Details

First Name* DemoSurgeon Middle Name Last Name* Canada IAM ID b4bb3f7ad02740c29dda80420f175070

Prefix Suffix PSF Allowed ☒

Email* canadademosurgeon@yopmail.com Phone 5555555555 Attention DemoSurgeon ID 63

Street1* 123 ABC Street Street2 Street3 City* Toronto

Country* Canada State/Province* Ontario Postal Code* M1R0E9 Region North America

Cancel Save

Accounts	Sales Team	Patient Care Coordinators	Scan Centers	Product	Preference
Name	City	State/Province	Country	Region	
Demo Canada Hospital	Toronto	Ontario	Canada	North America	

Add

Figure 68

Search and Create (Hospitals) Records

To Search and Create Accounts (Hospitals) records in Relationship HUB, select the Accounts role from the side panel of the application (Figure 69):

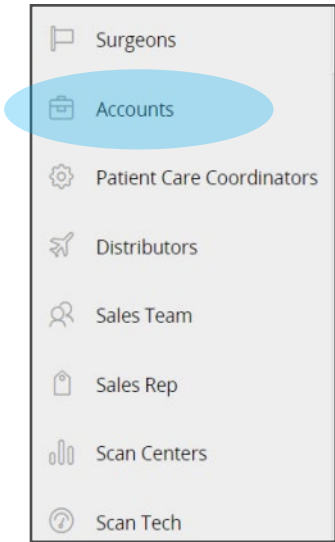


Figure 69

Search for Account (Hospital) Record

- 1 Search for an Account (Hospital) by selecting the region and entering in the name of the Account (Hospital). Then, select the “Search” button below (Figure 70). If this information does not match, please verify the selected region. If desired results are not found, create a new Account (Hospital) record.
- 2 The list of results that match the criteria are displayed in the Search Results section (Figure 71).

Accounts Management

Region★
North America

Country

Name
demo

Clear

Search

Add

Figure 70

Accounts Management

Region★
North America

Country

Name
demo

Clear

Search

Add

Search Results

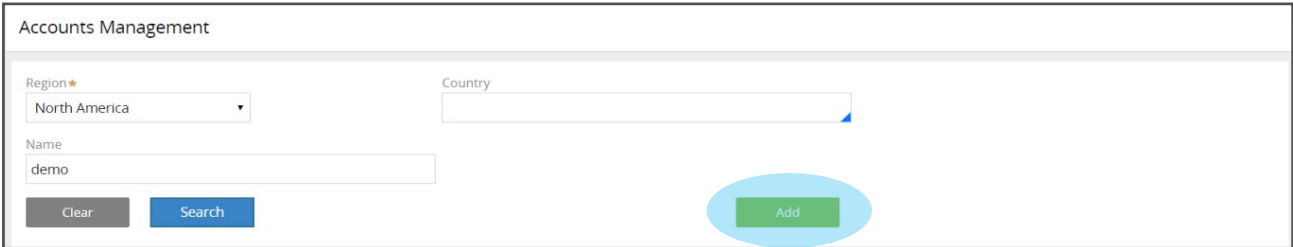
Name	Email	City	State/Province	Country	Select
Demo Canada Hospital		Toronto	Ontario	Canada	Open
Demo US Hospital		Detroit	Michigan	United States	Open

Figure 71

Create Account (Hospitals) Record

- 1 Once it has been confirmed that the user is not already in the system, select the “Add” button (Figure 72).
- 2 Enter all of the required information marked with an asterisk, and select “Save” to create the record (Figure 73).
- 3 Once the record is created, the Account (Hospital) can be associated with a Surgeon by selecting the “Add” button under the Surgeon tab (Figure 74).

Note: At this point, an Account (Hospital) can be invited to access DCMS.



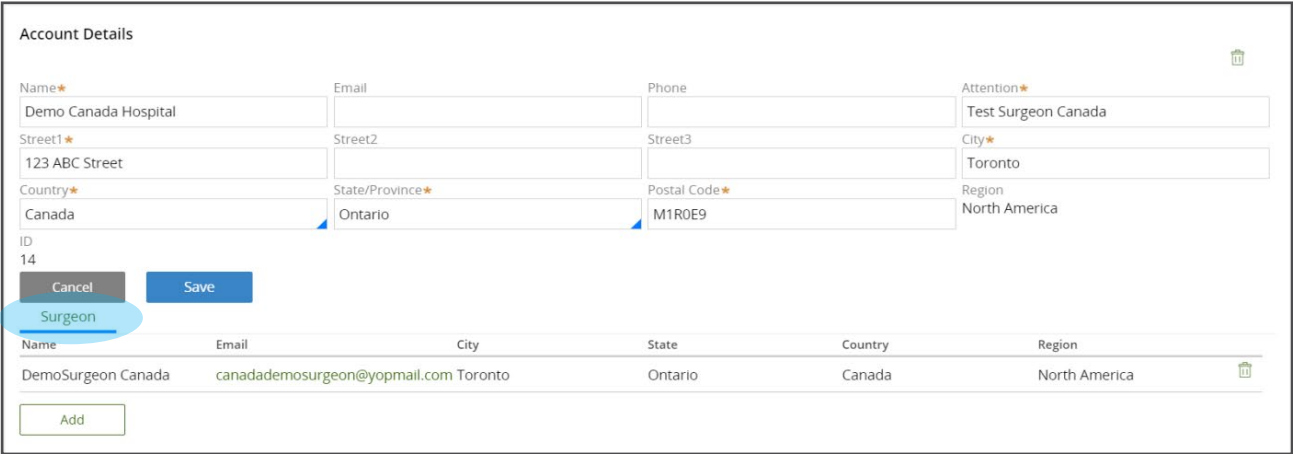
The 'Accounts Management' form contains the following fields: 'Region*' (dropdown menu with 'North America' selected), 'Country' (text input), 'Name' (text input with 'demo' entered), 'Clear' button, 'Search' button, and 'Add' button. The 'Add' button is highlighted with a blue circle.

Figure 72



The 'Account Details' form contains the following fields: 'Name*' (text input with 'Demo Canada Hospital'), 'Email' (text input), 'Phone' (text input), 'Attention*' (text input with 'Test Surgeon Canada'), 'Street1*' (text input with '123 ABC Street'), 'Street2' (text input), 'Street3' (text input), 'City*' (text input with 'Toronto'), 'Country*' (text input with 'Canada'), 'State/Province*' (text input with 'Ontario'), 'Postal Code*' (text input with 'M1R0E9'), and 'Region' (text input with 'North America'). Below the fields is the 'ID' (14) and 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a blue circle.

Figure 73



The 'Account Details' form is shown with the 'Surgeon' tab selected and highlighted with a blue circle. The 'Surgeon' tab displays a table with the following data:

Name	Email	City	State	Country	Region
DemoSurgeon Canada	canadademosurgeon@yopmail.com	Toronto	Ontario	Canada	North America

Below the table is an 'Add' button.

Figure 74

Search and Create PCC Records

To Search and Create PCC records in Relationship HUB, select the Patient Care Coordinators role from the side panel of the application (Figure 75):

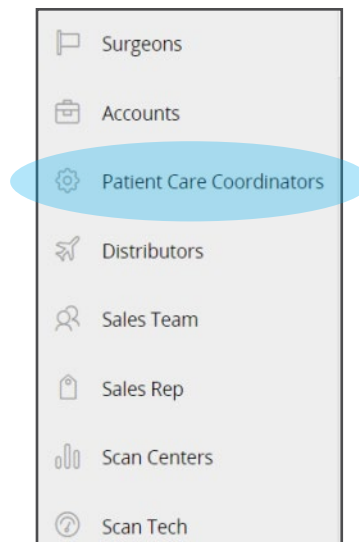


Figure 75

Search for PCC Record

- 1 Search for a PCC by selecting the region and entering in the name of the PCC. Then, select the “Search” button below (Figure 76).
- 2 The list of results that match the criteria are displayed in the Search Results section (Figure 77).

A search form titled "Patient Care Coordinators Management". It contains a "Region" dropdown menu set to "North America", a "Country" text input field, a "First Name" text input field, and a "Last Name" text input field. At the bottom, there are three buttons: "Clear", "Search" (highlighted with a blue oval), and "Add".

Figure 76

A search results page titled "Patient Care Coordinators Management". It shows the same search form as Figure 76. Below the form, there is a "Search Results" section. It includes a table with 7 columns: First Name, Last Name, Email, City, State/Province, Country, and Select. The table contains 3 rows of results. At the top right of the results section, there is a pagination bar showing "<< < Page 1 of 22 > >>".

First Name	Last Name	Email	City	State/Province	Country	Select
Test PCC	Test PCC	surgeont292@mailinator.com	warsaw	Indiana	United States	Open
AutomatedPCCF1	AutomatedPCCL1	AutomatedPCC1@yopmail.com	Warsaw	Indiana	United States	Open
TestNam	Pcc	TestNamPcc@yopmail.com	Edison	New Jersey	United States	Open

Figure 77

Create PCC Record

- 1 Once it has been confirmed that the user is not already in the system, select the “Add” button (Figure 78).
- 2 Enter all of the required information marked with an asterisk, and select “Save” to create the record (Figure 79).
- 3 Once the record is created, the PCC can be associated with a Surgeon by selecting the “Add” button under the Surgeon tab (Figure 80).

Note: At this point, a PCC can be invited to access DCMS.

Patient Care Coordinators Management

Region*
North America

Country

First Name

Last Name

Clear Search Add

Figure 78

PCC Details

First Name*
Test PCC

Middle Name

Last Name*
Test PCC

IAM ID
c08f12231d8a497db73cd803741327f2

Prefix

Suffix

Email*
surgeont292@mailinator.com

Phone

Attention

ID
1

Street1*
bell dr

Street2

Street3

City*
warsaw

Country*
United States

State/Province*
Indiana

Postal Code*
46582

Region
North America

Cancel Save

Figure 79

PCC Details

First Name*
Test PCC

Middle Name

Last Name*
Test PCC

IAM ID
c08f12231d8a497db73cd803741327f2

Prefix

Suffix

Email*
surgeont292@mailinator.com

Phone

Attention

ID
1

Street1*
bell dr

Street2

Street3

City*
warsaw

Country*
United States

State/Province*
Indiana

Postal Code*
46582

Region
North America

Cancel Save

Surgeon

Name	Email	City	State	Country	Region	
Qa Surgeon Test Surgeon	Qasurvivus@mailinator.com	Warsaw	Indiana	United States	North America	
Duplicate Surgeon	duplicatesurgeon@yopmail.com	Omaha	Nebraska	United States	North America	
Test Nam Surgeon Test Nam Surgeon	surgeont292@gmail.com	Warsaw	Indiana	United States	North America	

Figure 80

Search and Create Distributor Records

To Search and Create Distributor records in Relationship HUB, select the Distributors role from the side panel of the application (Figure 81):

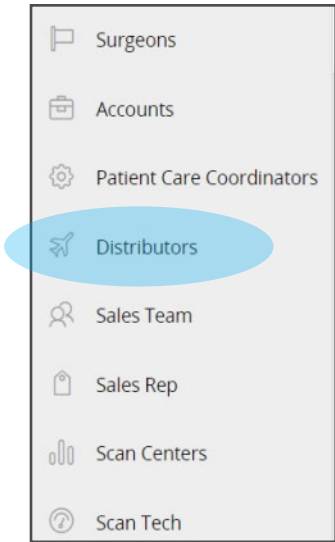


Figure 81

Search for Distributor Record

- 1 Search for a Distributor by selecting the region and entering in the name if the Distributor. Then, select the “Search” button below (Figure 82).
- 2 The list of results that match the criteria are displayed in the Search Results section (Figure 83).

Distributor Management

Region★
North America

Country

Name
demo

Clear

Search

Add

Figure 82

Distributor Management

Region★
North America

Country

Name
demo

Clear

Search

Add

Search Results

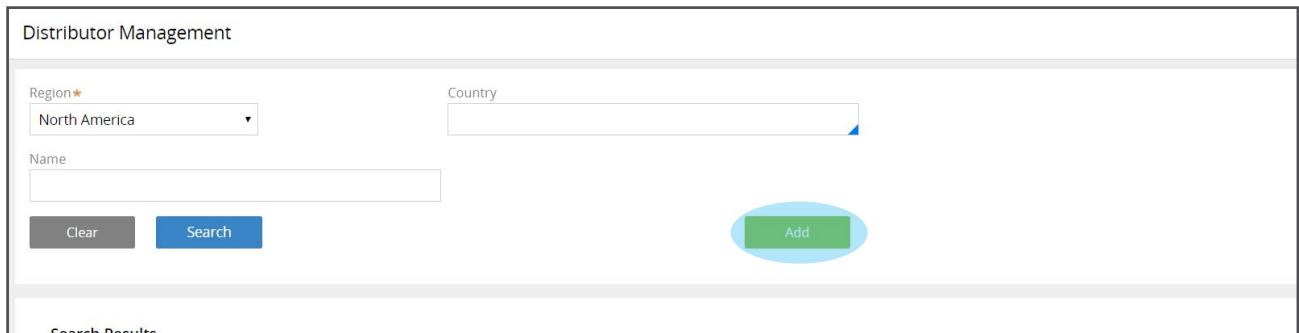
Name	Email	City	State/Province	Country	Select
NAM Demo Distributor		Detroit	Michigan	United States	Open
Canada Demo Distributor		Toronto	Ontario	Canada	Open
DEMO NAM US Distrb	DEMO_NAM_US_Distrb@mailinator.com	Warsaw	Indiana	United States	Open

Figure 83

Create Distributor Record

- 1 Once it has been confirmed that the user is not already in the system, select the “Add” button (Figure 84).
- 2 Enter all of the required information marked with an asterisk, and select “Save” to create the record (Figure 85).
- 3 Once the record is created, the Distributor can be associated with a Sales Team by selecting the “Add” button under the Sales Team tab (Figure 86).

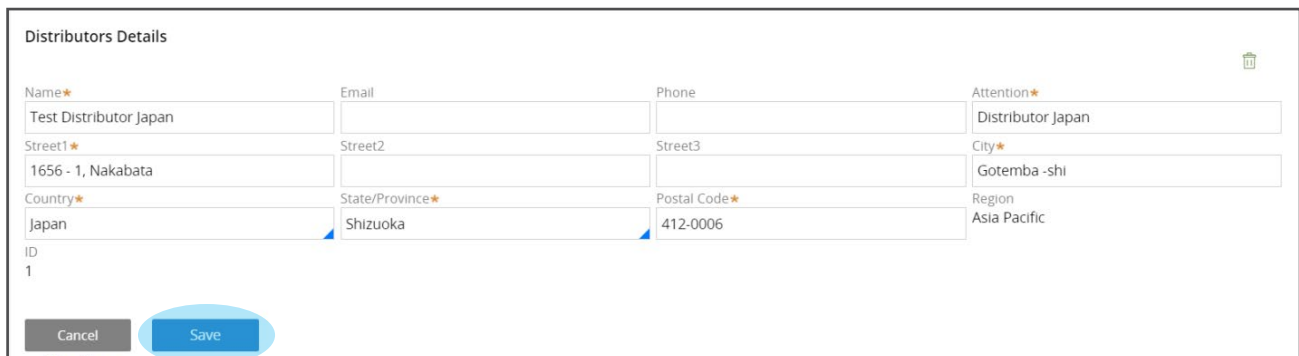
Note: At this point, a Distributor can be invited to access DCMS.



The 'Distributor Management' form contains the following fields and controls:

- Region***: A dropdown menu with 'North America' selected.
- Country**: An empty text input field.
- Name**: An empty text input field.
- Buttons**: 'Clear' (grey), 'Search' (blue), and 'Add' (green, circled in blue).
- Search Results**: A section header at the bottom of the form.

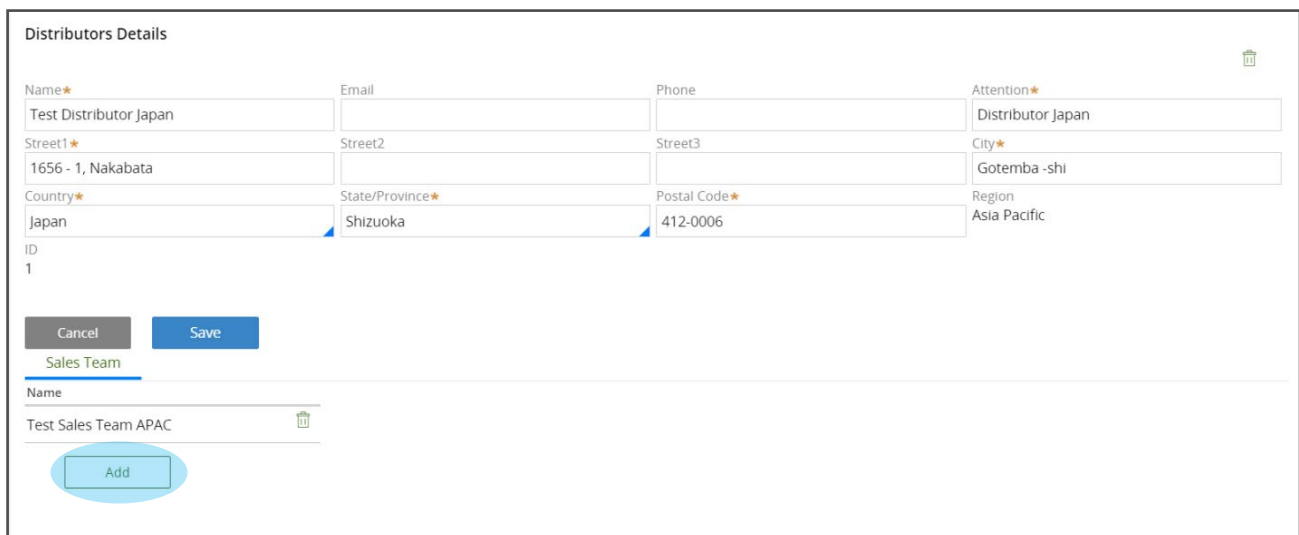
Figure 84



The 'Distributors Details' form contains the following fields and controls:

- Name***: 'Test Distributor Japan'
- Email**: Empty
- Phone**: Empty
- Attention***: 'Distributor Japan'
- Street1***: '1656 - 1, Nakabata'
- Street2**: Empty
- Street3**: Empty
- City***: 'Gotemba -shi'
- Country***: 'Japan'
- State/Province***: 'Shizuoka'
- Postal Code***: '412-0006'
- Region**: 'Asia Pacific'
- ID**: '1'
- Buttons**: 'Cancel' (grey) and 'Save' (blue, circled in blue).

Figure 85



The 'Distributors Details' form is shown with the 'Sales Team' tab selected. It contains the following fields and controls:

- Name***: 'Test Distributor Japan'
- Email**: Empty
- Phone**: Empty
- Attention***: 'Distributor Japan'
- Street1***: '1656 - 1, Nakabata'
- Street2**: Empty
- Street3**: Empty
- City***: 'Gotemba -shi'
- Country***: 'Japan'
- State/Province***: 'Shizuoka'
- Postal Code***: '412-0006'
- Region**: 'Asia Pacific'
- ID**: '1'
- Buttons**: 'Cancel' (grey) and 'Save' (blue).
- Sales Team**: A section header.
- Name**: 'Test Sales Team APAC' (with a trash icon)
- Add**: A button circled in blue.

Figure 86

Search and Create Sales Team Records

To Search and Create Team records in Relationship HUB, select the Sales Team role from the side panel of the application (Figure 87):

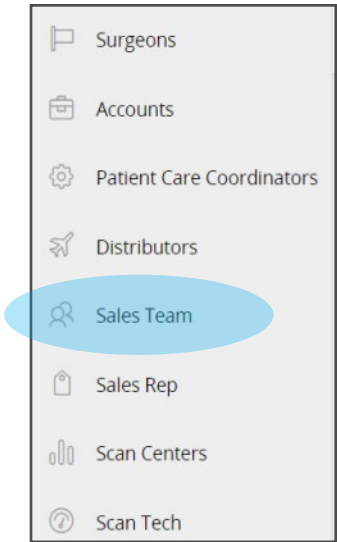


Figure 87

Search for Sales Team Record

- 1 Search for a Sales Team by selecting the region and entering the name of a Sales Representative on the Sales Team that you are searching for. Then, select the “Search” button below. (Figure 88).
- 2 The list of results that match the criteria are displayed in the Search Results section (Figure 89).

Sales Teams Management

Please search the sales team using Sales Rep Name.

Region★
North America

Country

First Name

Last Name

Clear

Search

Add

Figure 88

Sales Teams Management

Please search the sales team using Sales Rep Name.

Region★
North America

Country

First Name
demo

Last Name

Clear

Search

Add

Search Results

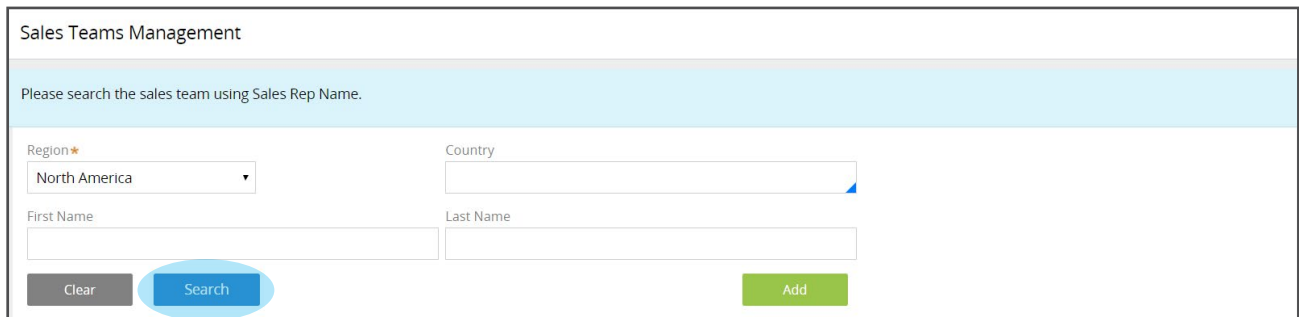
Sales Team	First Name	Last Name	Email	City	State/Province	Country	Select
NAM Demo Sales Team	DemoSalesRep	NAM	testzbadmin5@zimmerbiomet.com	Detroit	Michigan	United States	Open
Canada Demo Sales Team	DemoSalesRep	Canada	testzbadmin2@zimmerbiomet.com	Toronto	Ontario	Canada	Open
NAM Demo Sales Team	DemoRep2	US	usdemorep2@yopmail.com	Detroit	Michigan	United States	Open

Figure 89

Create Sales Team Record

- 1 Once it has been confirmed that the user is not already in the system, select the “Add” button (Figure 90).
- 2 Enter all of the required information marked with an asterisk, and select “Save” to create the record (Figure 91).
- 3 Once the record is created, the Sales Team can be associated with Distributors and Surgeons by selecting the “Add” button under the designated tabs (Figure 92). Sales Representatives cannot be disassociated from or added to the Sales Teams.

Note: At this point, a Sales Team can be invited to access DCMS.



Sales Teams Management

Please search the sales team using Sales Rep Name.

Region*
North America

Country

First Name

Last Name

Clear Search Add

Figure 90



Sales Team Details

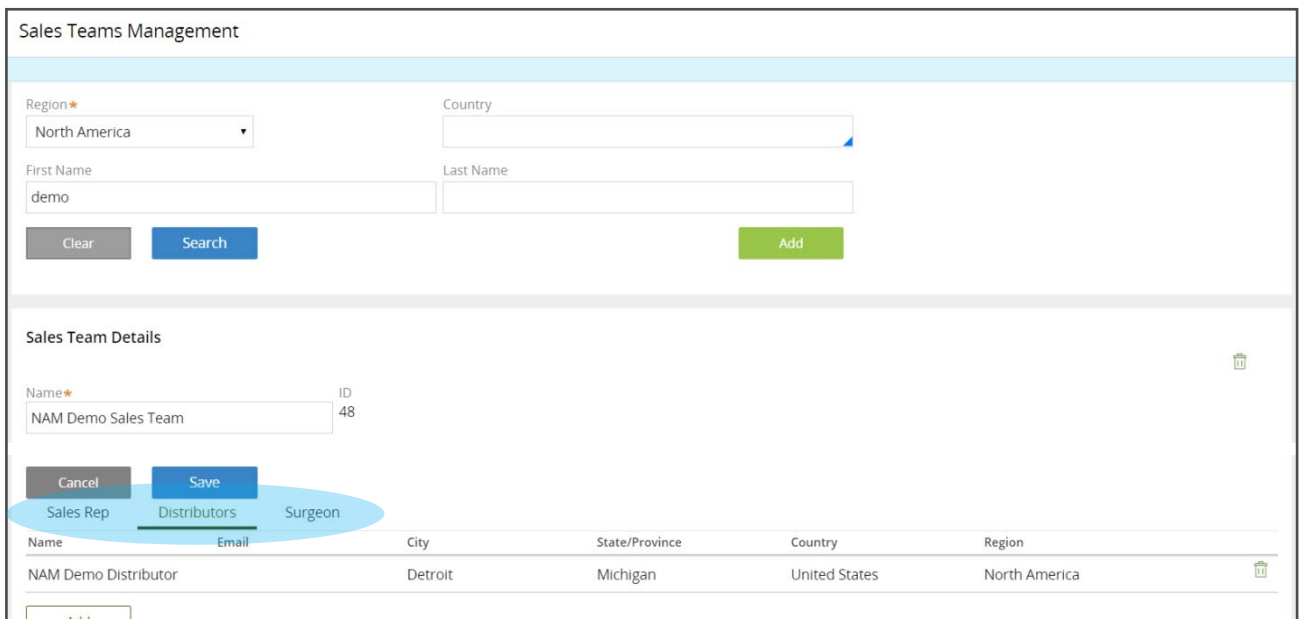
Name* ID
NAM Demo Sales Team 48

Cancel Save

Sales Rep Distributors Surgeon

Name	Email	City	State/Province	Country	Region
DemoSalesRep NAM	testbhadwin5@zimmerbiomet.com	Detroit	Michigan	United States	North America

Figure 91



Sales Teams Management

Please search the sales team using Sales Rep Name.

Region*
North America

Country

First Name
demo

Last Name

Clear Search Add

Sales Team Details

Name* ID
NAM Demo Sales Team 48

Cancel Save

Sales Rep Distributors Surgeon

Name	Email	City	State/Province	Country	Region
NAM Demo Distributor		Detroit	Michigan	United States	North America

Figure 92

Search and Create Sales Representative Records

To Search and Create Sales Representative records in Relationship HUB, select the Sales Rep role from the side panel of the application (Figure 93):

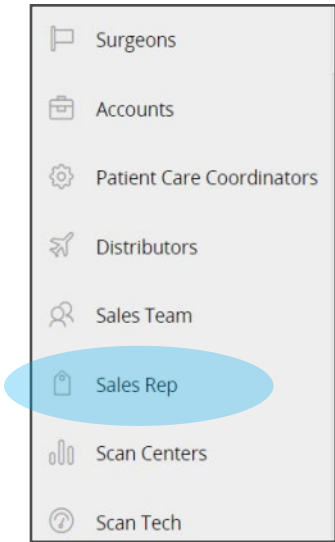


Figure 93

Search for Sales Representative Record

- 1 Search for a Sales Representative by selecting the region and entering in the name of the Sales Representative. Then, select the “Search” button below (Figure 94).
- 2 The list of results that match the criteria are displayed in the Search Results section (Figure 95).

Sales Reps Management

Region★
North America

Country

First Name
demo

Last Name

Clear

Search

Add

Figure 94

Sales Reps Management

Region★
North America

Country

First Name
demo

Last Name

Clear

Search

Add

Search Results

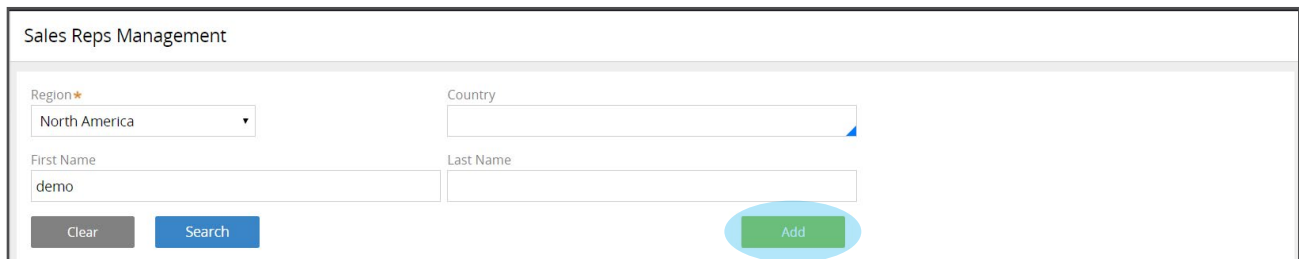
First Name	Last Name	Email	City	State/Province	Country	Select
DemoSalesRep	NAM	testzbadmin5@zimmerbiomet.com	Detroit	Michigan	United States	Open
DemoSalesRep	Canada	testzbadmin2@zimmerbiomet.com	Toronto	Ontario	Canada	Open
DemoRep2	US	usdemorep2@yopmail.com	Detroit	Michigan	United States	Open
DemoRep2	Canada	canadademorep2@yopmail.com	Toronto	Ontario	Canada	Open

Figure 95

Create Sales Representative Record

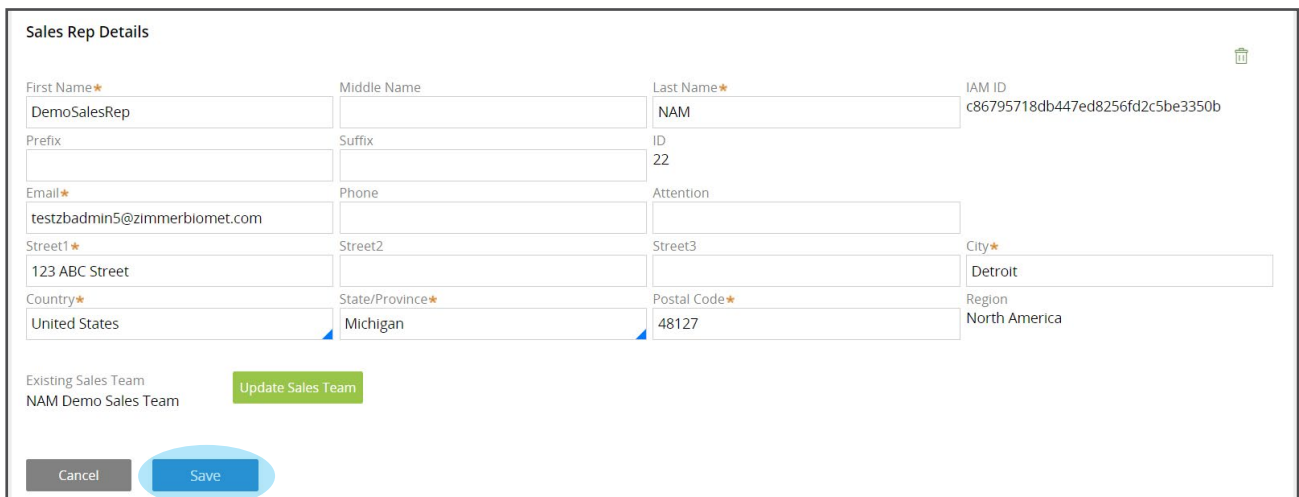
- 1 Once it has been confirmed that the user is not already in the system, select the “Add” button (Figure 96).
- 2 Enter all of the required information marked with an asterisk, and select “Save” to create the record (Figure 97).
- 3 Once the record is created, the Sales Representative’s Sales Team can be edited by selecting the “Update Sales Team” button towards the bottom of the screen (Figure 98).

Note: At this point, a Sales Representative can be invited to access DCMS.



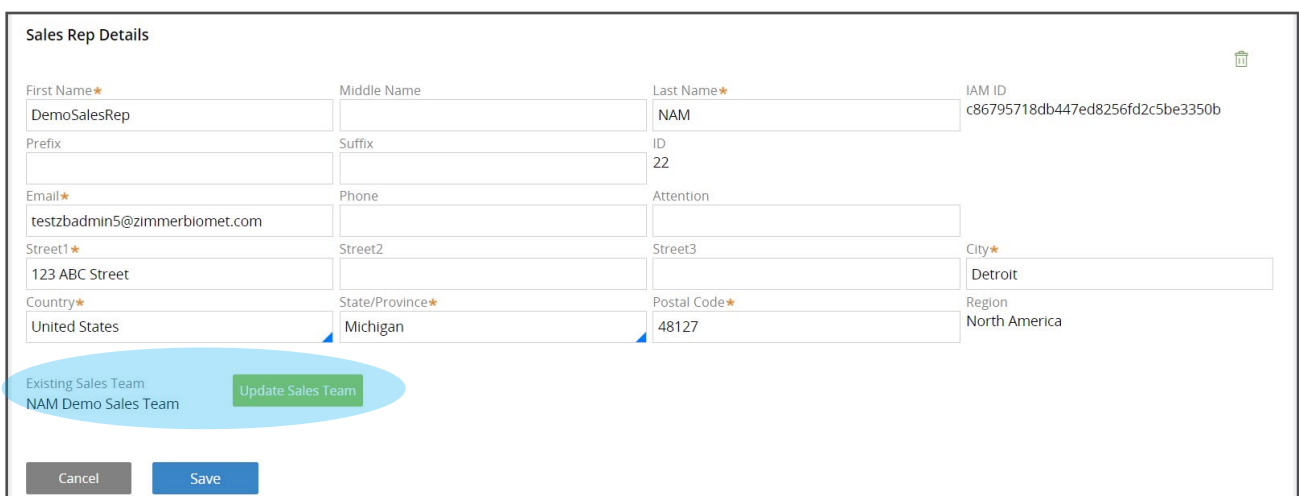
The 'Sales Reps Management' form contains the following fields: 'Region' (dropdown menu with 'North America' selected), 'Country' (text input), 'First Name' (text input with 'demo'), and 'Last Name' (text input). At the bottom left are 'Clear' and 'Search' buttons. At the bottom right is a green 'Add' button, which is highlighted with a blue circle.

Figure 96



The 'Sales Rep Details' form contains the following fields: 'First Name' (text input with 'DemoSalesRep'), 'Middle Name' (text input), 'Last Name' (text input with 'NAM'), 'IAM ID' (text input with 'c86795718db447ed8256fd2c5be3350b'), 'Prefix' (text input), 'Suffix' (text input), 'ID' (text input with '22'), 'Email' (text input with 'testzbadmin5@zimmerbiomet.com'), 'Phone' (text input), 'Attention' (text input), 'Street1' (text input with '123 ABC Street'), 'Street2' (text input), 'Street3' (text input), 'City' (text input with 'Detroit'), 'Country' (text input with 'United States'), 'State/Province' (text input with 'Michigan'), 'Postal Code' (text input with '48127'), and 'Region' (text input with 'North America'). At the bottom left is a text label 'Existing Sales Team' with 'NAM Demo Sales Team' below it. To the right of this label is a green 'Update Sales Team' button. At the bottom are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a blue circle.

Figure 97



This form is identical to Figure 97, showing the 'Sales Rep Details' form. In this version, the 'Update Sales Team' button (green) is highlighted with a blue circle, along with the 'Existing Sales Team' text and 'NAM Demo Sales Team' label.

Figure 98

Search and Create Scan Center Records

To Search and Create Scan Center records in Relationship HUB, select the Scan Centers role from the side panel of the application (Figure 99):

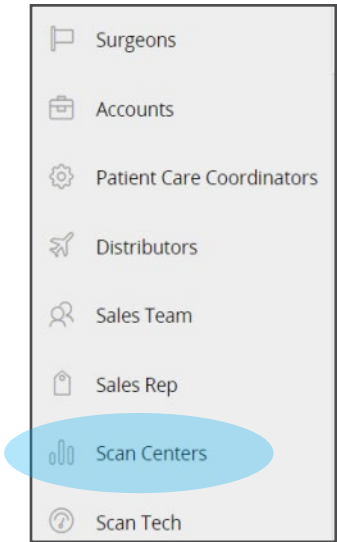


Figure 99

Search for Scan Center Record

- 1 Search for a Scan Center by selecting the region and entering in the name of the Scan Center. Then, select the “Search” button below (Figure 100).
- 2 The list of results that match the criteria are displayed in the Search Results section (Figure 101).

Scan Center Management

Region★
North America ▼

Country

Name
demo

Clear

Search

Add

Figure 100

Scan Center Management

Region★
North America ▼

Country

Name
demo

Clear

Search

Add

Search Results

Name	Email	City	State/Province	Country	Select
Demo Scan Center		Detroit	Michigan	United States	Open
DemoScanCenter	demoscancenter@yopmail.com	Detroit	Michigan	United States	Open
TestdemoScancenter	Testdefect@yopmail.com	Warsaw	Indiana	United States	Open

Figure 101

Create Scan Center Record

- 1 Once it has been confirmed that the user is not already in the system, select the “Add” button (Figure 102).
- 2 Enter all of the required information marked with an asterisk, and select “Save” to create the record (Figure 103).
- 3 Once the record is created, the Scan Center can be associated with Scan Technicians and Surgeons by selecting the “Add” button towards the bottom of the screen (Figure 104). AMT (Anatomy, Modality, and Technology) information will need to be gathered as well.

Note: At this point, a Scan Center can be invited to access DCMS.

Scan Center Management

Region★
North America

Country

Name
demo

Clear Search Add

Figure 102

Scan Center Details

Name★ DemoScanCenter Email demoscancenter@yopmail.com Phone Attention

Street1★ 123 ABC Street Street2 Street3 City★ Detroit

Country★ United States State/Province★ Michigan Postal Code★ 48127 Region North America

ID 14

Cancel Save

Figure 103

Scan Center Details

Name★ DemoScanCenter Email demoscancenter@yopmail.com Phone Attention

Street1★ 123 ABC Street Street2 Street3 City★ Detroit

Country★ United States State/Province★ Michigan Postal Code★ 48127 Region North America

ID 14

Cancel Save

Scan Techs AMTs Surgeon

Name	Email	City	State	Country	Region
DemoScanTech NAM	demoscantechnam@yopmail.com	Detroit	Michigan	United States	North America
Test Account	Testaccount@yopmail.com	edison	New Jersey	United States	North America

Add

Figure 104

Search and Create Scan Technician

To Search and Create Scan Technician records in Relationship HUB, select the Scan Technician role from the side panel of the application (Figure 105):

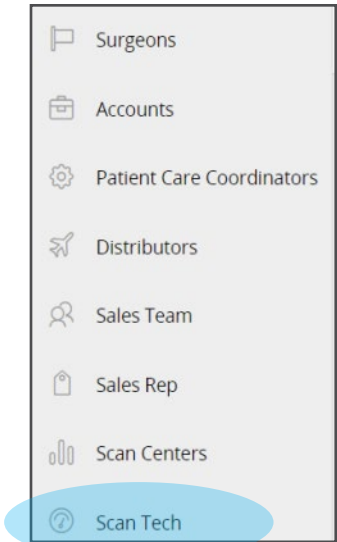


Figure 105

Search for Scan Technicians

- 1 Search for a Scan Technicians by selecting the region and entering in the name of the Scan Technician. Then, select the “Search” button below (Figure 106).
- 2 The list of results that match the criteria are displayed in the Search Results section (Figure 107).

Scan Tech Management

Region★
North America ▼

Country

First Name
demo

Last Name

Clear

Search

Add

Figure 106

Scan Tech Management

Region★
North America ▼

Country

First Name
demo

Last Name

Clear

Search

Add

Search Results

First Name	Last Name	Email	City	State/Province	Country	Select
DemoScanTech	NAM	demoscantechnam@yopmail.com	Detroit	Michigan	United States	Open
TestDemo	ScanTech	Testdefect@yopmail.com	Warsaw	Indiana	United States	Open

Figure 107

Create Scan Technician Record

- 1 Once it has been confirmed that the user is not already in the system, select the “Add” button (Figure 108).
- 2 Enter all of the required information marked with an asterisk, and select “Save” to create the record (Figure 109).
- 3 Once the record is created, the Scan Technician can be associated with a Scan Center by selecting the “Add” button towards the bottom of the screen (Figure 110).

Note: At this point, a Scan Technician can be invited to access DCMS.

Scan Tech Management

Region*
North America

Country

First Name
demo

Last Name

Clear Search Add

Figure 108

Scan Tech Details

First Name* DemoScanTech Middle Name Last Name* NAM IAM ID

Prefix Suffix

Email* demoscantechnam@yopmail.com Phone Attention ID 12

Street1* 123 ABC Street Street2 Street3 City* Detroit

Country* United States State/Province* Michigan Postal Code* 41287 Region North America

Cancel Save

Figure 109

Scan Tech Details

First Name* DemoScanTech Middle Name Last Name* NAM IAM ID

Prefix Suffix

Email* demoscantechnam@yopmail.com Phone Attention ID 12

Street1* 123 ABC Street Street2 Street3 City* Detroit

Country* United States State/Province* Michigan Postal Code* 41287 Region North America

Cancel Save

Scan Center

Name	Email	City	State	Country	Region
DemoScanCenter	demoscancenter@yopmail.com	Detroit	Michigan	United States	North America
TestScanCenter		Warsaw	Indiana	United States	North America

Add

Figure 110

Inviting New Accounts to Access DCMS

Once you’ve created a new user account, you will need to invite the user to access DCMS.
To give new DCMS users access:

- 1 When logged into DCMS, select your name icon in the upper right hand corner, “Switch apps,” and then “Registration Management” (Figure 111).

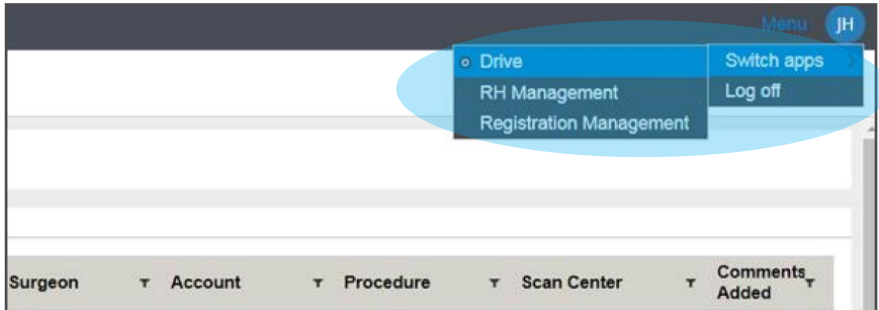


Figure 111

- 2 Once you are in the “Registration Management” application, select the “New” function, then select the “User Invitation” function (Figure 112).

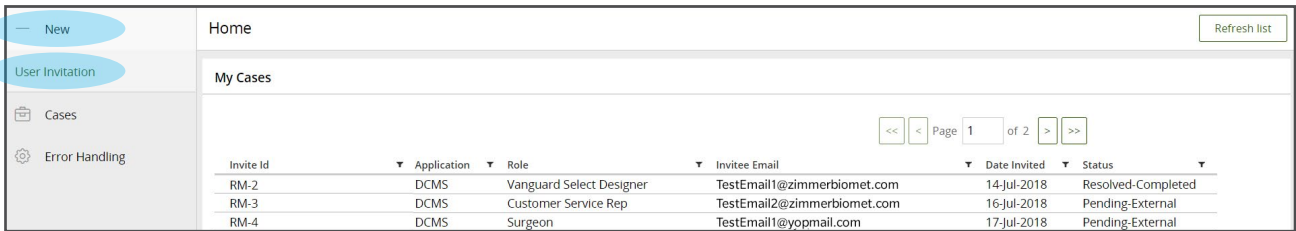


Figure 112

- 3 Select the “DRIVE Case Management System” application, the country that your new user is located in, and the new user’s role from the drop down menu. Select “Search” (Figure 113).

A screenshot of the 'Invitation Screen' form. It contains three dropdown menus: 'Application' (set to 'Drive Case Management System'), 'Country' (set to 'United States'), and 'User Role' (set to 'Surgeon'). There are 'Cancel' and 'Search' buttons at the bottom.

Figure 113

- 4 Once you are on the “Invitation Screen,” search for your new user by either first or last name, and select “Search.” Once you’ve located the user, select the “Select” button next to the user’s information (Figure 114).

The screenshot shows the 'Invitation Screen' with a search bar and a 'Users List' table. The search bar has 'demo' entered in the 'First Name' field. The 'Users List' table has columns: First Name, Email, City, State/Province, Country, and Select. A row is highlighted with the 'Select' button circled in blue.

First Name	Email	City	State/Province	Country	Select
Demo Surgeon Test	demosurgeon00@yopmail.com	Warsaw	Indiana	United States	Select

Figure 114

- 5 The “Registration Screen” will show you the user’s name and address. At this point, if any of the information is incorrect, you can select “Cancel” and go back into “RH Management” and make and corrections. If the user’s information is accurate, select “Invite,” and a registration email notification will be sent out to them (Figure 115).

The screenshot shows the 'Registration Screen' with a form for user registration. The form includes fields for Application, Country, User Role, and a 'SELECTED USER DETAIL' section. The 'Invite' button is circled in blue.

SELECTED USER DETAIL

First Name	Middle Name	Last Name	IAM ID
Demo Surgeon		Test	

Prefix:
 Email: demosurgeon00@yopmail.com
 Street1: 123 ABC Ln.
 State/Province: Indiana
 Country: United States
 Postal Code: 46580
 City: Warsaw
 Region: North America

Figure 115

- 6 The “Cases” function allows you to view all of the users who have been registered for DCMS. You can view the status of each user’s registration completion on the right-hand side. The status: “Pending-External” means that the user has not complete registration. The status: “Resolved-Completion” means that the user has finished their DCMS registration. You also have the ability to sort through your cases by selecting any of the arrows (Figure 116).

The screenshot shows the 'Cases' function with a table of registered users. The table has columns: Invite Id, Application, Role, Invitee Email, Date Invited, and Status. The 'Status' column is circled in blue.

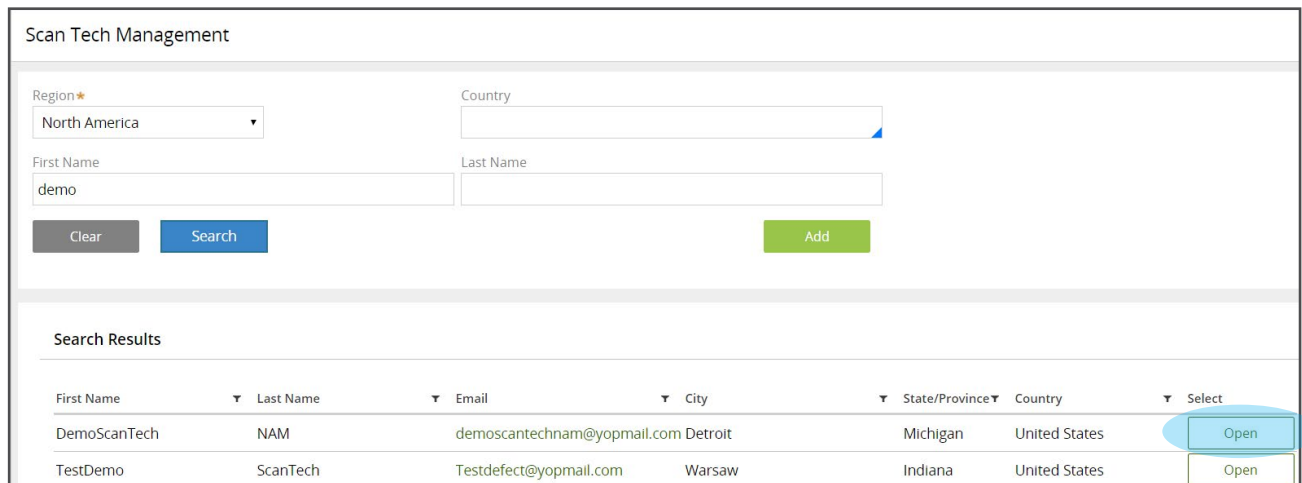
Invite Id	Application	Role	Invitee Email	Date Invited	Status
RM-39	DCMS	Surgeon	TestEmail1@yopmail.com	19-Jul-2018	Pending-External
RM-38	DCMS	Surgeon	TestEmail2@yopmail.com	19-Jul-2018	Resolved-Completed
RM-37	DCMS	Surgeon	TestEmail3@yopmail.com	19-Jul-2018	Pending-External

Figure 116

6.2 Modify/Delete Records

You have the ability to modify and delete records. To modify or delete records, see the steps below:

- 1 Once you've selected "Search," select "Open" next to the name of the list of the results displayed (Figure 117).



Scan Tech Management

Region*
North America

Country

First Name
demo

Last Name

Clear Search Add

Search Results

First Name	Last Name	Email	City	State/Province	Country	Select
DemoScanTech	NAM	demoscantechnam@yopmail.com	Detroit	Michigan	United States	Open
TestDemo	ScanTech	Testdefect@yopmail.com	Warsaw	Indiana	United States	Open

Figure 117

- 2 Select "Save," once you have added or revised all necessary information for the record that have edited (Figure 118).



Scan Tech Details

First Name* DemoScanTech Middle Name Last Name* NAM IAM ID

Prefix Suffix

Email* demoscantechnam@yopmail.com Phone Attention ID 12

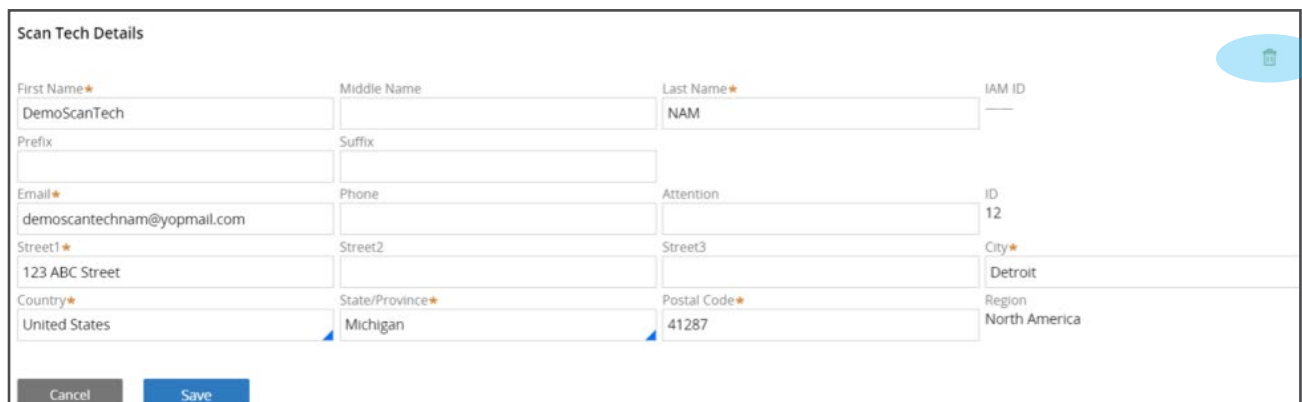
Street1* 123 ABC Street Street2 Street3 City* Detroit

Country* United States State/Province* Michigan Postal Code* 41287 Region North America

Cancel Save

Figure 118

- 3 To delete a record, select the trash icon in the record (Figure 119).



Scan Tech Details

First Name* DemoScanTech Middle Name Last Name* NAM IAM ID

Prefix Suffix

Email* demoscantechnam@yopmail.com Phone Attention ID 12

Street1* 123 ABC Street Street2 Street3 City* Detroit

Country* United States State/Province* Michigan Postal Code* 41287 Region North America

Cancel Save

Figure 119

6.3 Completing User Registration (New Users' Role)

Once a CSR has added you to the system, you will need to complete phase two, so that you can begin accessing DCMS. To complete registration:

- 1 Access your email, and open the “Drive Case Management System: “Invitation To Register to-Drive Case Management System” email. Then, select “Click here” (in blue) (Figure 120).

If you are a Zimmer Biomet team member: In order to access DCMS and register, you must be on the Zimmer Biomet network. If you are not already logged into the Zimmer Biomet network, then you will be presented with the Zimmer Biomet login screen below when accessing DCMS. To login, enter your Zimmer Biomet credentials in one of the formats specified below:

- Corporate email address: (e.g. first.last@zimmerbiomet.com)
- domain\username

If you are a new employee or legacy Zimmer then use one of the following (depending on your region):

- North America: nam\username
- Europe: eur\username
- Japan: jpn\username
- Pacific: pac\username

If you are a legacy Biomet employee then use biomet\username.

Note: If you encounter problems logging in with your corporate credentials, please contact the Zimmer Biomet IT Help Desk (see Appendix for phone number).

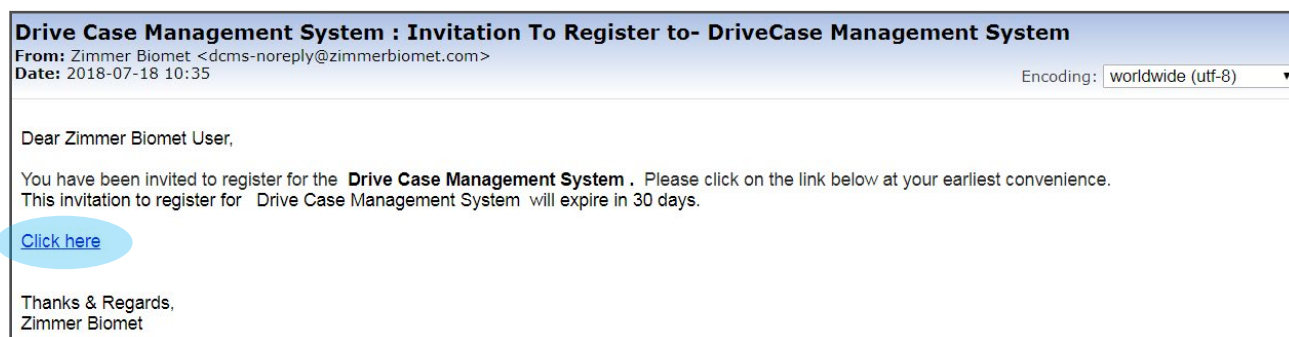


Figure 120

- 2 On the “Registration” screen, your email and first and last name will be pre-populated. Choose a password and then check the “Terms and Conditions” and “Privacy Policy” box. Once complete, select “Submit” (Figure 121).

2a. Registering as Surgeon, Patient Care Coordinator, or Scan Technician:

On the “Registration” screen, your email and first and last name will be pre-populated. Choose a password and then check the “Terms and Conditions” and “Privacy Policy” box. Once complete, select “Submit”.

2b. Registering as a Sales Representative or Customer Support Rep: Check the “Terms and Conditions” and “Privacy Policy” box. Once complete, select “Submit”.

The image shows a web form titled "Registration". At the top, it says "Register with your email and password:". Below this, there are input fields for email (pre-filled with "demosurgeon00@yopmail.com"), role (a dropdown menu with "Demo Surgeon" selected), and a "Test" button. There are two password input fields labeled "Password *" and "Confirm password *". Below the password fields is a checkbox labeled "I have read and understood the Terms and Conditions and Privacy Policies *". At the bottom of the form is a large blue "Submit" button.

Figure 121

- 3 Select your country and phone number to receive your verification code. Select “Get the Code,” and a verification code will be sent to you through text message. Whenever you log into a new device, you will receive a new verification code through text message, and you will enter this number into DCMS upon logging in (Figure 122).

Note: you are only able to receive verification codes through text message. Email verification codes will be available with future updates.

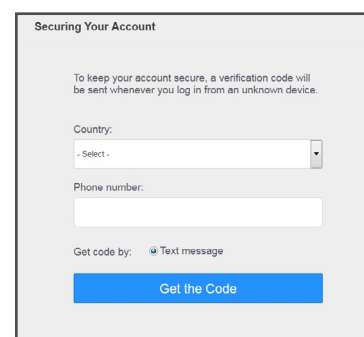
A form titled "Securing Your Account" with a message: "To keep your account secure, a verification code will be sent whenever you log in from an unknown device." It includes a "Country:" dropdown menu with a "Select" option, a "Phone number:" text input field, and a "Get code by:" section with a radio button selected for "Text message". A blue "Get the Code" button is at the bottom.

Figure 122

- 4 Access your email, and open the email titled: Welcome to Drive Case Management System. Once in the email, select “Click Here,” and you will be routed to DCMS, where you will be able to login and begin using the system (Figure 123).

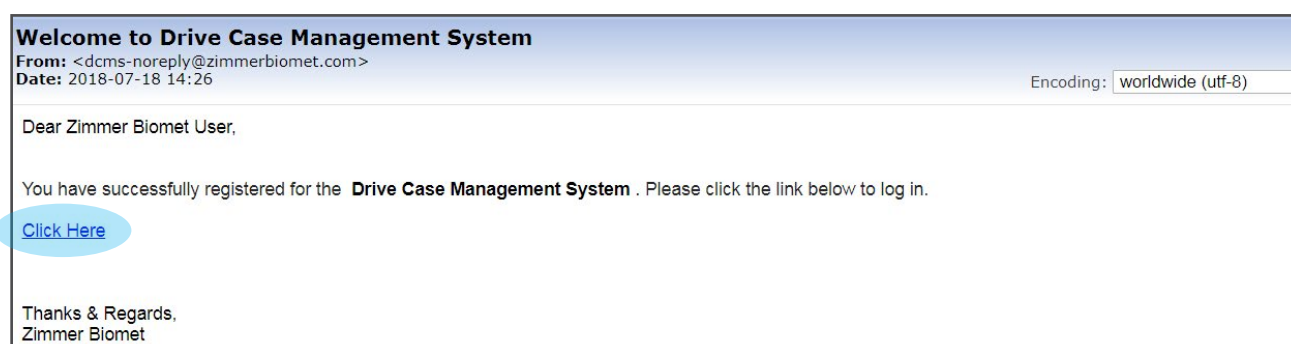



Figure 123

- 5 Log in with your email address and password. If you are a Zimmer Biomet Team Member or Sales Representative, select the  button. If you are a Surgeon, Scan Technician, or PCC, enter your email and password in on the right-hand side (Figure 124).

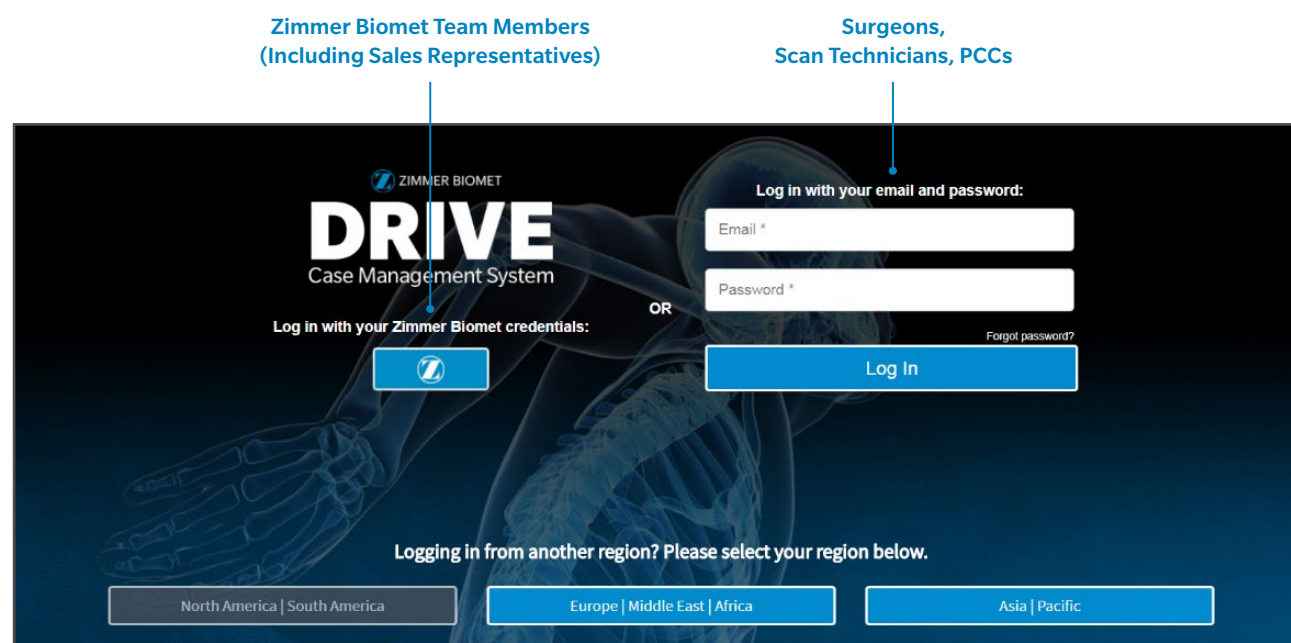
The login page for the DRIVE Case Management System. It features the Zimmer Biomet logo and the text "DRIVE Case Management System". There are two main login paths: "Log in with your Zimmer Biomet credentials:" with a blue button containing the Zimmer Biomet logo, and "Log in with your email and password:" with fields for "Email *" and "Password *", a "Forgot password?" link, and a blue "Log In" button. Below these is a section "Logging in from another region? Please select your region below." with three buttons: "North America | South America", "Europe | Middle East | Africa", and "Asia | Pacific". Labels with arrows point to the Zimmer Biomet logo button and the "Log in with your email and password:" section.

Figure 124

7. Troubleshooting

The Personalized Solutions email address is: personalizedsolutions@zimmerbiomet.com.

Q I'm getting an error when entering the verification code during login.

A Verification codes will expire after 10 minutes. If your code expires, you will need to request a new one. Select the “Back” button on the browser and re-login, and a new code will be sent.

Q I'm seeing the following error when trying to log into DCMS in Internet Explorer 11 (Figure 125):

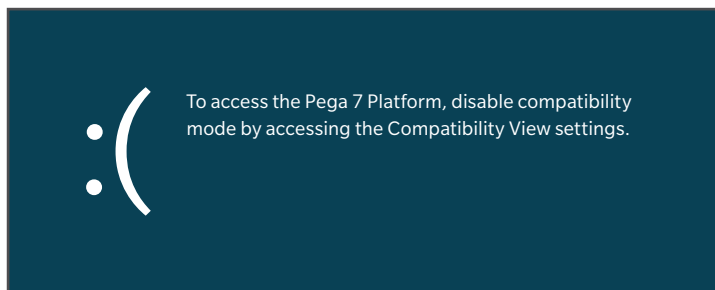


Figure 125

A This is an issue with the IE11 browser, in order to fix this issue, please see the below steps:

1. Select the “Gear” icon in the browser and then “Compatibility View Settings” (Figure 126).
2. Ensure that there are no websites listed in the “Websites you’ve added to Compatibility View” section (Figure 127).
3. Ensure that the “Display intranet sites in Compatibility View” box is **unselected** (Figure 128).
4. Select “Close.”
5. Close the browser, reopen it, and try logging into DCMS again.



Figure 126

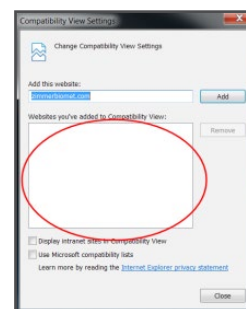


Figure 127

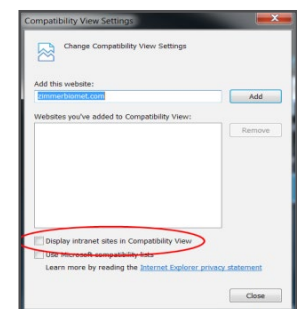


Figure 128

Q I'm not getting logged into DCMS when using Internet Explorer 11 and logging in as a Zimmer Biomet user with my corporate account.

A This is an issue with the IE11 browser. In order to fix this issue, please do the following:

1. Select the "Gear" icon in the browser, and then select "Compatibility Settings" (Figure 129).
2. Ensure that there are no websites listed in the "Websites you've added to Compatibility View" section (Figure 130).
3. Ensure that the "Display intranet sites in Compatibility View" is unselected (Figure 131).
4. Select "Close."
5. Close the browser, reopen it, and try logging into DCMS again.



Figure 129

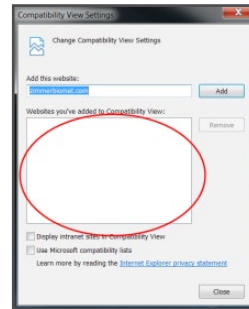


Figure 130

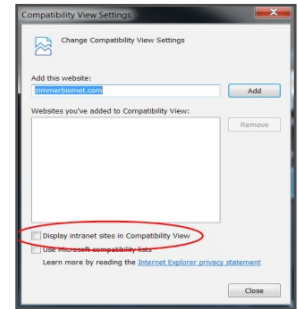


Figure 131

Q I'm seeing an error page after successfully logging in instead of the "Case List" in DCMS.

A Make sure that you're using a compatible browser (Chrome, Safari, FireFox, IE11). Edge is compatible with DCMS but not compatible with SurgiCase Planner.

Q The Surgicase Planner isn't launching from DCMS.

A Make sure that you're using a compatible browser (Chrome, Safari, FireFox, IE11) and device (desktop or iPad/tablet).

8. FAQs

Q What email address will be used?

- A** Sale Representatives and other Zimmer Biomet Team Members will use corporate Zimmer Biomet Active Directory Accounts. Non-Sales Representative users (Surgeons, Scan Technicians, and Administrators) will use what is currently in SOMS and ZOMS.

Q What if I don't know my corporate email address?

- A** Contact Personalized Solutions or the IT Service Desk.

Q What devices will DCMS and SurgiCase work on?

- A** DCMS is compatible with desktop, tablets (including iPads) and mobile phones. The SurgiCase Planner is compatible with desktops and iPads.

Q How do I create a case?

- A** See section 3.2 Creating a Case.

Q How does a Sales Representative view a case ready for Surgeon approval?

- A** In the SurgiCase Planner, once a Surgeon sets preferences, a Sales Representative can view a case by following the instructions in Section 3.7 – Launch Web Planner. (A Sales Representative and Surgeon will be notified when a plan is ready for approval) Please see section 4.2 Approving a Case for approval procedures.

Q How does a Surgeon approve a case?

- A** There is a 2-step process that the Surgeon must go through. First, the Surgeon selects “Approve,” and then enters a password. See section 4.2 Approving a Case.

Q How do I manage image uploads?

- A** The preferred method is Direct Method via Laurel Bridge or VPN. See section 3.3.1 Setting Up Direct Method.

Q How do I add a scan site?

- A** Contact Personalized Solutions, where CSR will gather information. A test scan will be required for new sites. If it is already an existing scan site, CSR should go into Relationship HUB to set up.

Q How do I add a new user?

- A** Contact Personalized Solutions, CSR should go into Relationship HUB to set up.

Q Can I change a surgery date?

A Yes, see section 3.5.2 Changing the Surgery Date

Q How do I check on the status of a case?

A Select “Cases” on the left-hand side of the screen to view all cases, and filter by case status (Figure 132).

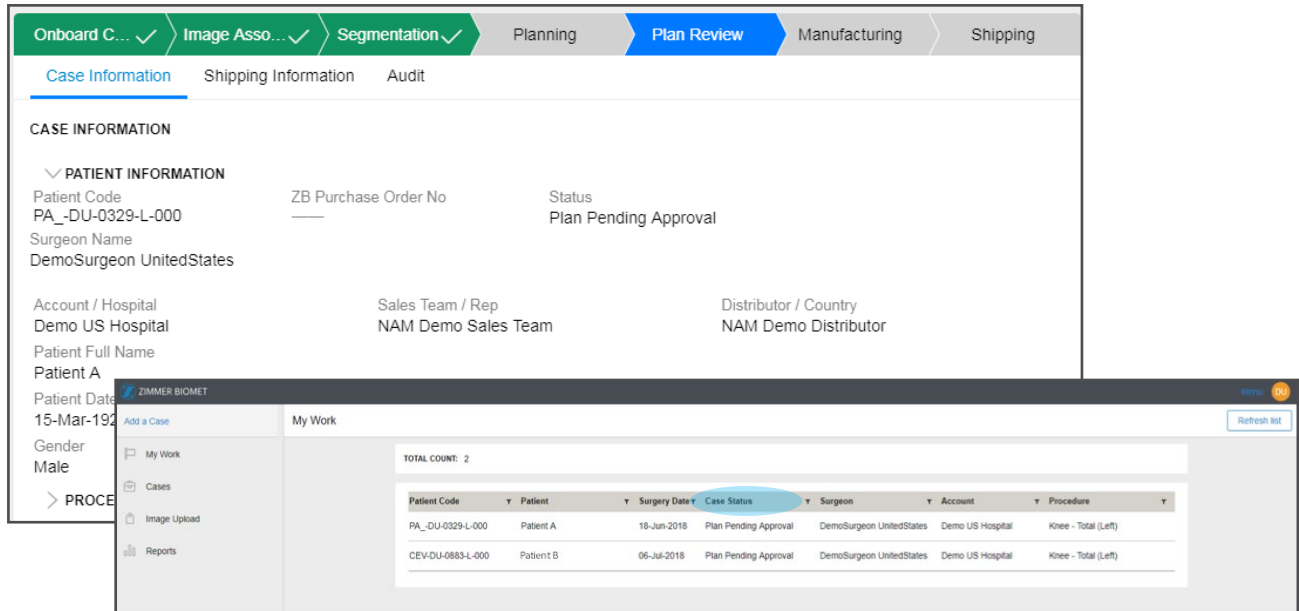


Figure 132

Q We are having issues uploading images. How can we troubleshoot this?

A If you are using VPN or Laurel Bridge, contact Personalized Solutions Team. If you are using NUANCE, Powershare call: 1-866-809-4746 for technical support.

Q Can I track my case (shipping)?

A You can track shipping on the DCMS Screen or through email. Sales Representatives will receive an email notification, which includes the tracking number, a Hyperlink to FedEx/UPS, the Procedure type, the name of the Surgeon, and the date of the surgery. All of this information can be found under the “Shipping” tab (Figure 133). You must go to “Shipping.”

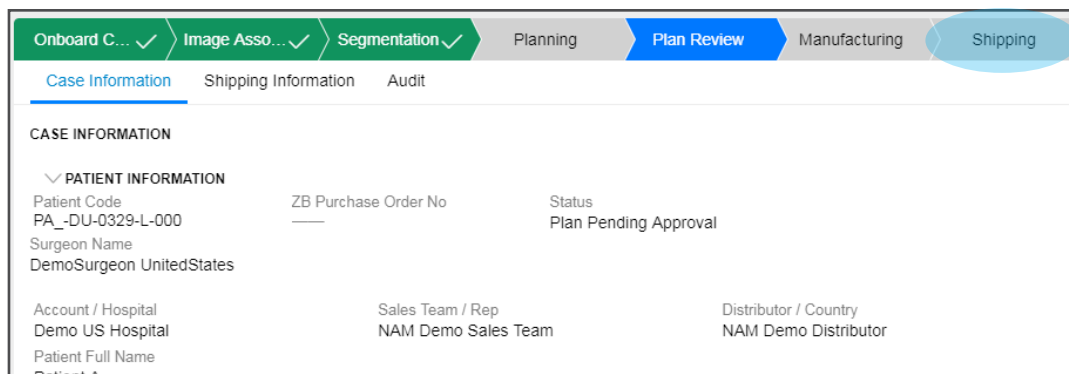


Figure 130

Q How do I upload or create a test scan for MRI/CT?

A Send images to Personalized Solutions via Direct Method, CD, or Web Uploader. Communicate that test images have been sent by emailing Personalized Solutions at: (574) 371- 3710 or personalizedsolutions@zimmerbiomet.com.

Q As a Signature user, why do I have to approve my plans now?

A To meet the IT, Compliance, and Regulatory requirements, all cases must be approved by a Surgeon regardless of the legacy system and process that they used.

Q How to get historical case information (pdfs, planning, etc.) from the former SOMs and ZOMs site once they shut down?

A Please contact Personalized Solutions Customer Support with Case ID, Surgeon Name, and/or Surgery Date at: (574) 371-3710 or personalizedsolutions@zimmerbiomet.com.

Q How to get case historical information (pdfs, planning, etc.) from DCMS?

A This information can be obtained from the Case List and Case Reports. You can go back one year with DCMS.

Q How frequently do you have to change your password?

A 90 days for internal users and 180 for external users.

Other Issues?

If encountering other issues, please include the following information when reporting the problem to help the team identify root causes and troubleshoot:

- Browser
- Device (i.e. desktop, tablet, etc.)
- Geographic location
- Network from where the application was being accessed (Hospital, Zimmer Biomet facility, etc.)
- Steps to reproduce the problem
- Screenshots

**For additional information,
please visit [PS.ZimmerBiomet.com](https://www.PS.ZimmerBiomet.com).**

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