UpToDate®

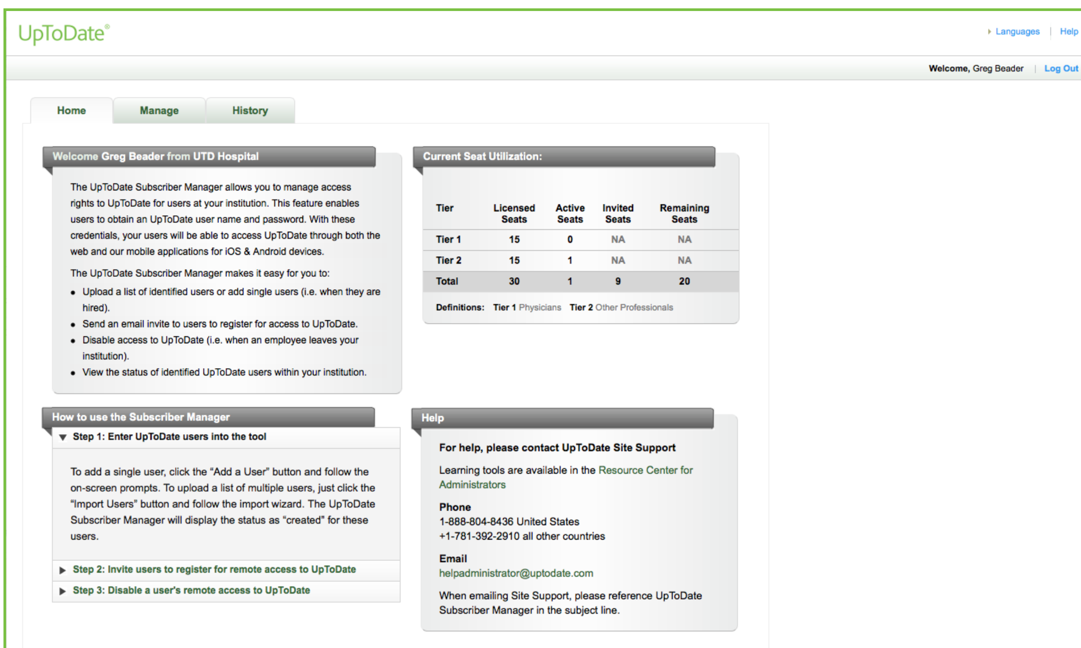
How to Use UpToDate® Subscriber Manager — Instructions and Best Practices

Overview:

Subscriber Manager is an intuitive, web-based tool designed to enable you to easily manage access to UpToDate for users from your organization. As the administrator, you will invite clinicians to register and obtain a user name and password. Once registered, clinicians can access UpToDate using the UpToDate Mobile App, by going through your organization's EHR/EMR system (if your institution has integrated this system with UpToDate), or by logging into uptodate.com/login from any computer.

The number of UpToDate Anywhere seats available in your organization was determined at the time your organization obtained its subscription, and is reflected in your contract. Subscriber Manager provides a dashboard to keep you informed of seat utilization – including number of licensed seats, remaining, invited and active seats, and the remaining seats by tier. Should a user's affiliation with your organization cease, you can disable their access through the Subscriber Manager tool, and invite another user to utilize the seat which becomes available.

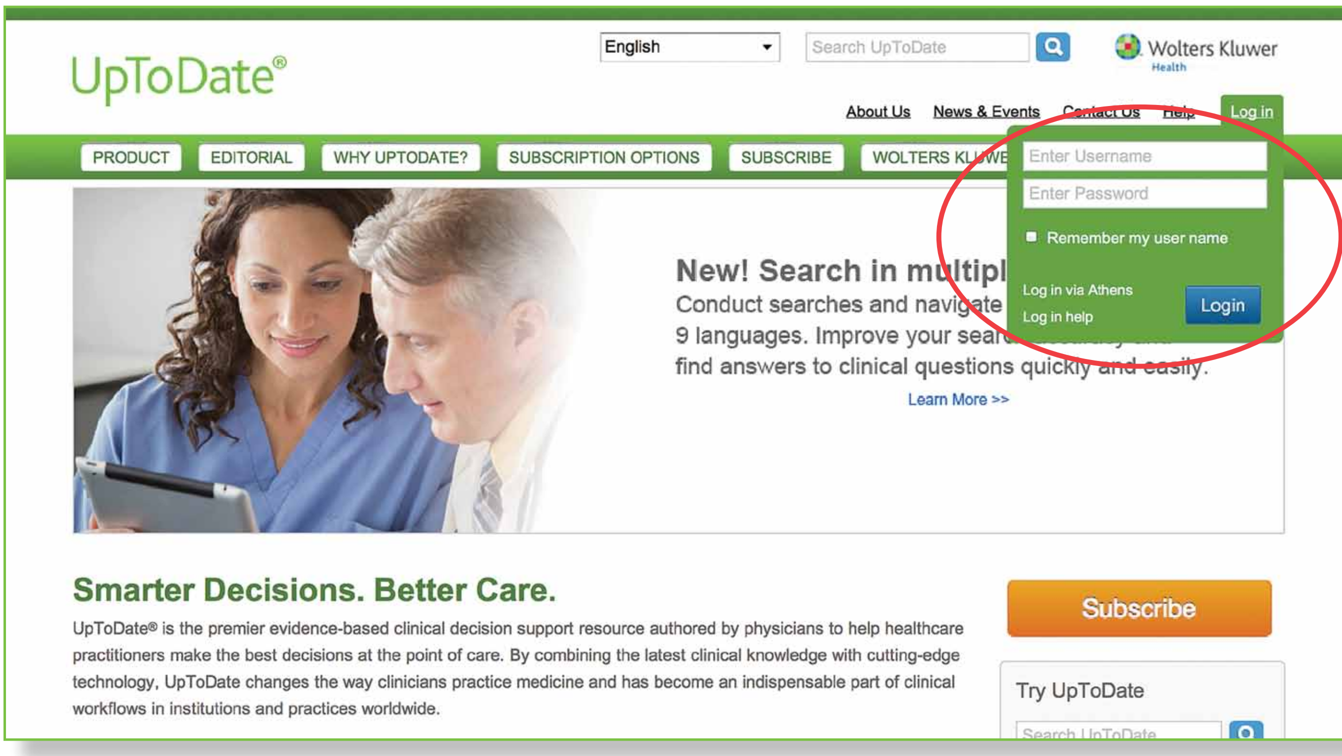
You can find and track the number of available seats on the homepage:



If you need technical assistance please contact sitesupport@uptodate.com or call 1-888-804-8436 in the United States and Canada (+1-781-392-2910 all other countries).

To access Subscriber Manager

- You will receive an order confirmation via email following signing of your contract. Log in with the user name and password provided to you in the order confirmation email. Go to www.uptodate.com and click on the log in link.
- Upon login, you will automatically be redirected to the Subscriber Manager.

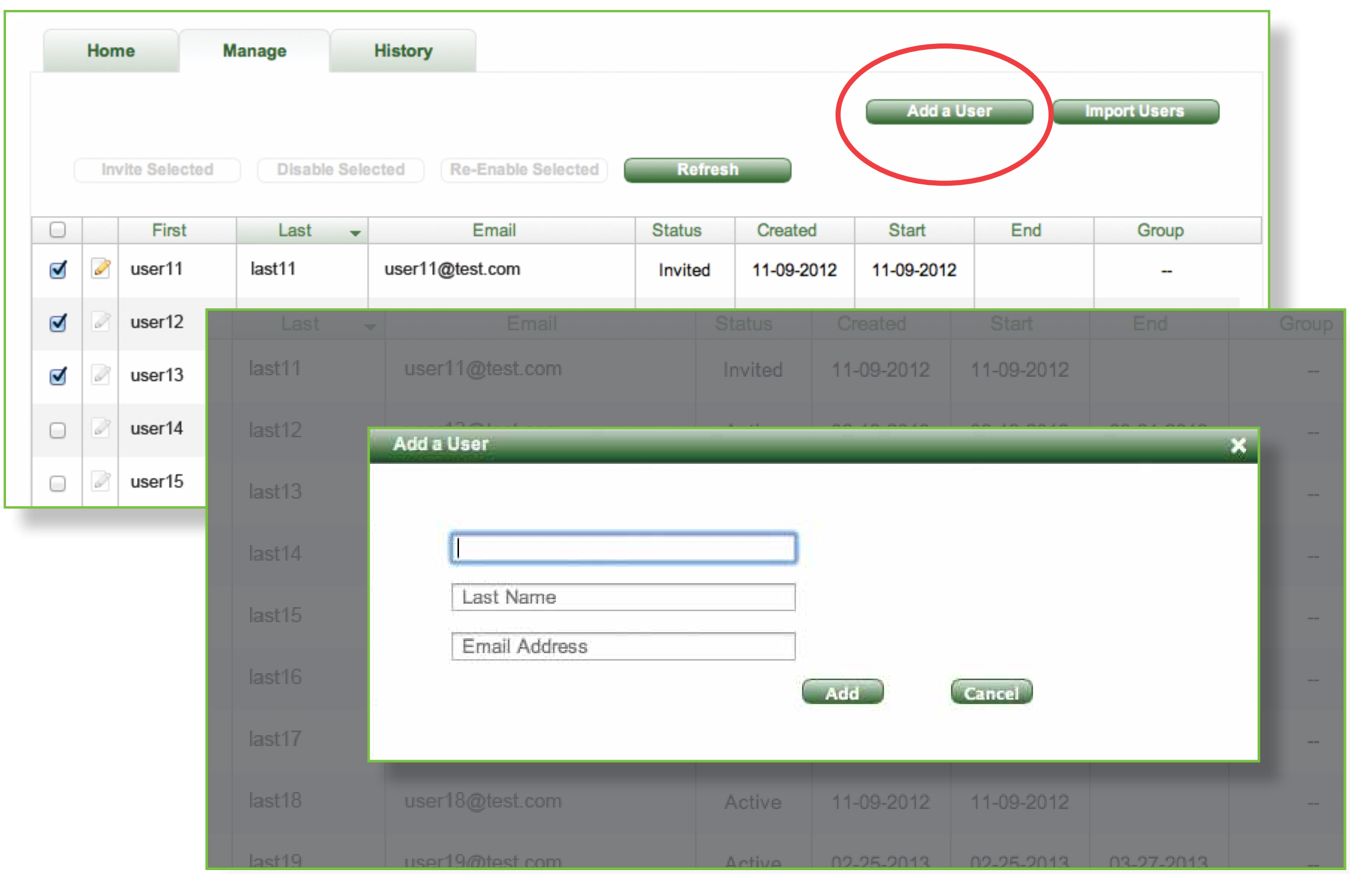


Getting started is as easy as **1-2-3!**

Step 1: Create a list of clinicians you'd like to invite to register for UpToDate.

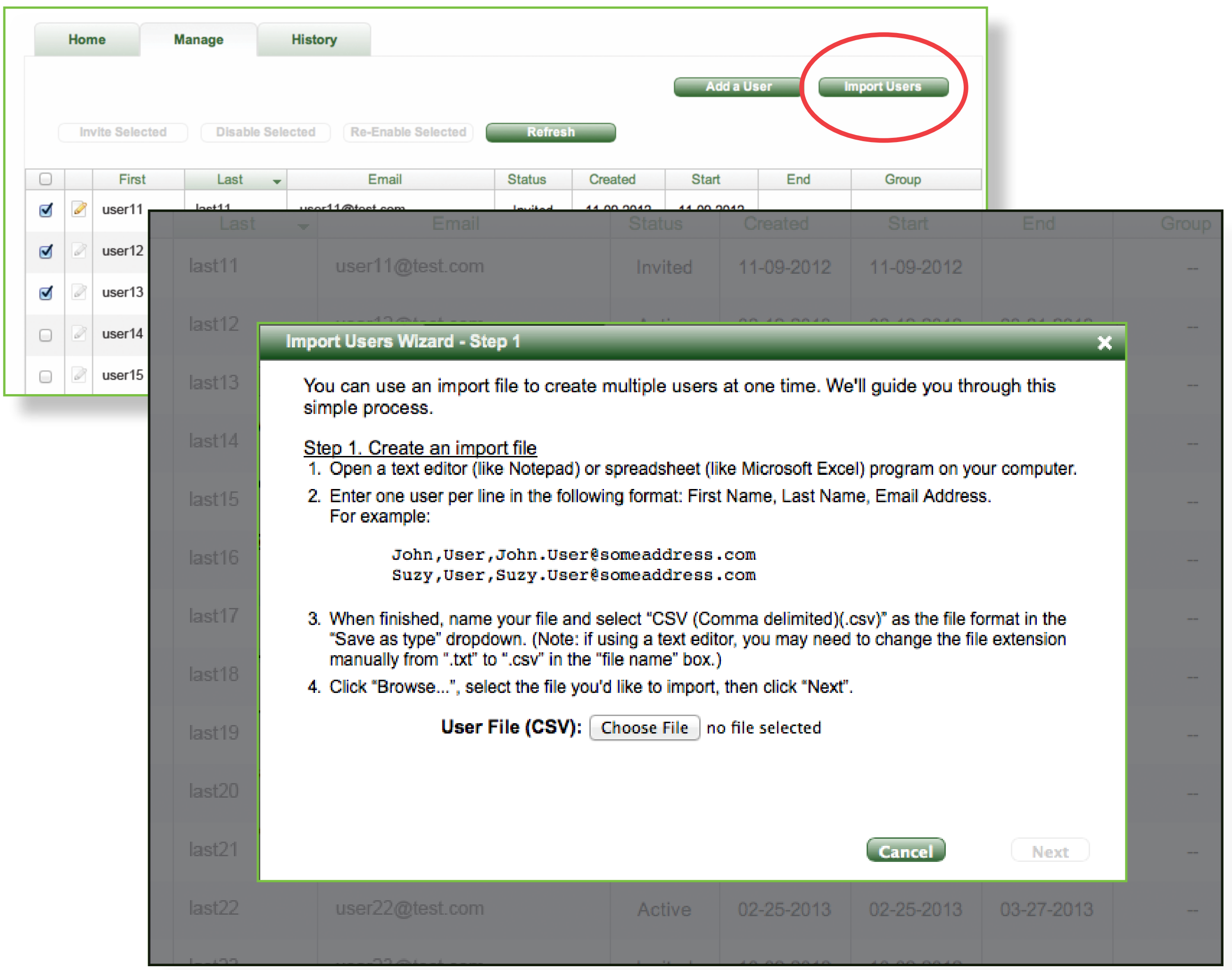
You may add invitees one at a time by clicking the "Add a User" button or import a list of users by clicking the "Import Users" button.

The illustration below shows you how to add one user at a time:

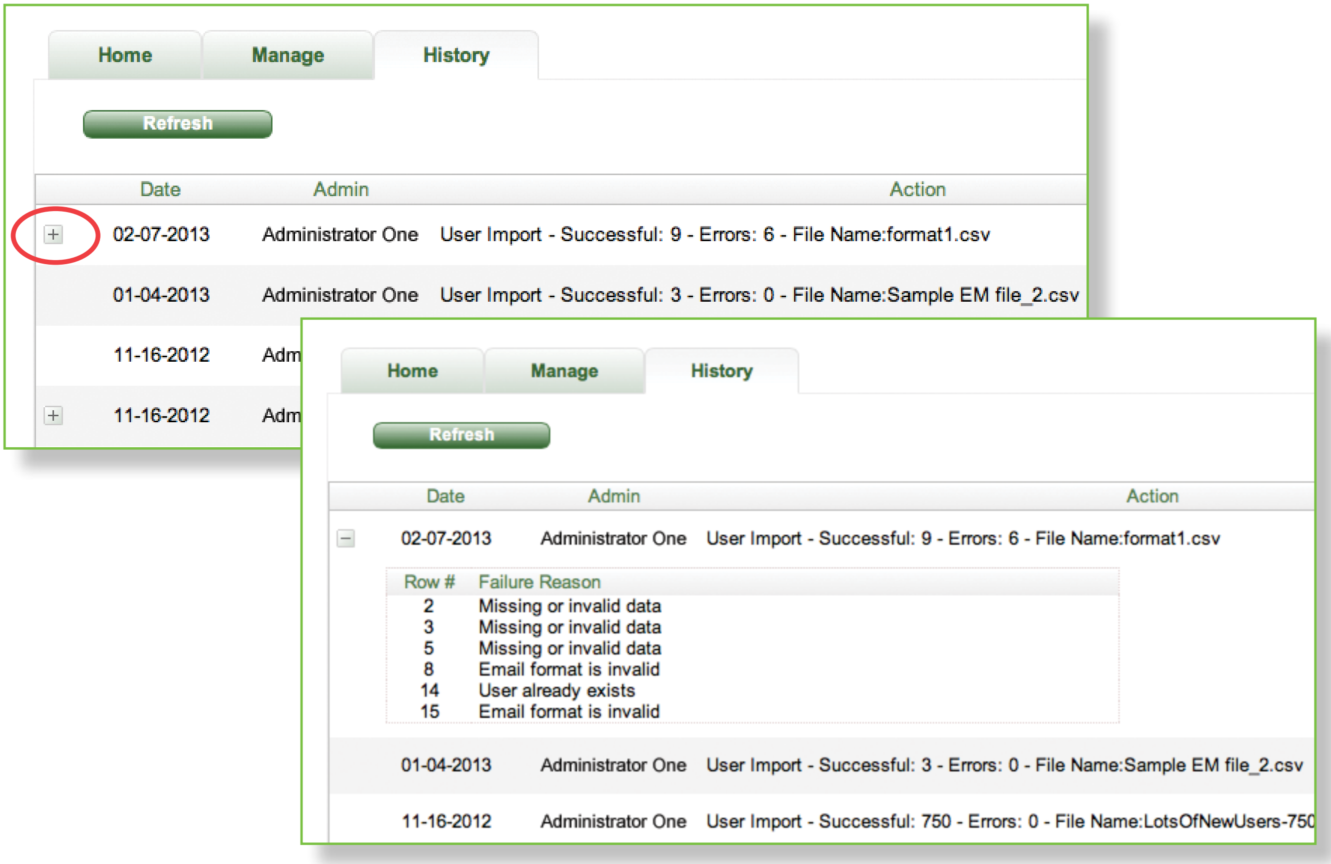


The illustration below shows you how to import a list of users:

Clicking the "Import users" button will launch an import wizard in a pop-up window. This wizard will assist you with importing a .CSV file. (.CSV is the only supported file type at this time.) The file must include the user's first name, last name, and email address. Once the file is selected for upload, you can preview the first five rows of data to verify the fields are displaying correctly. After the file is uploaded, you will receive notification that the file has been submitted.



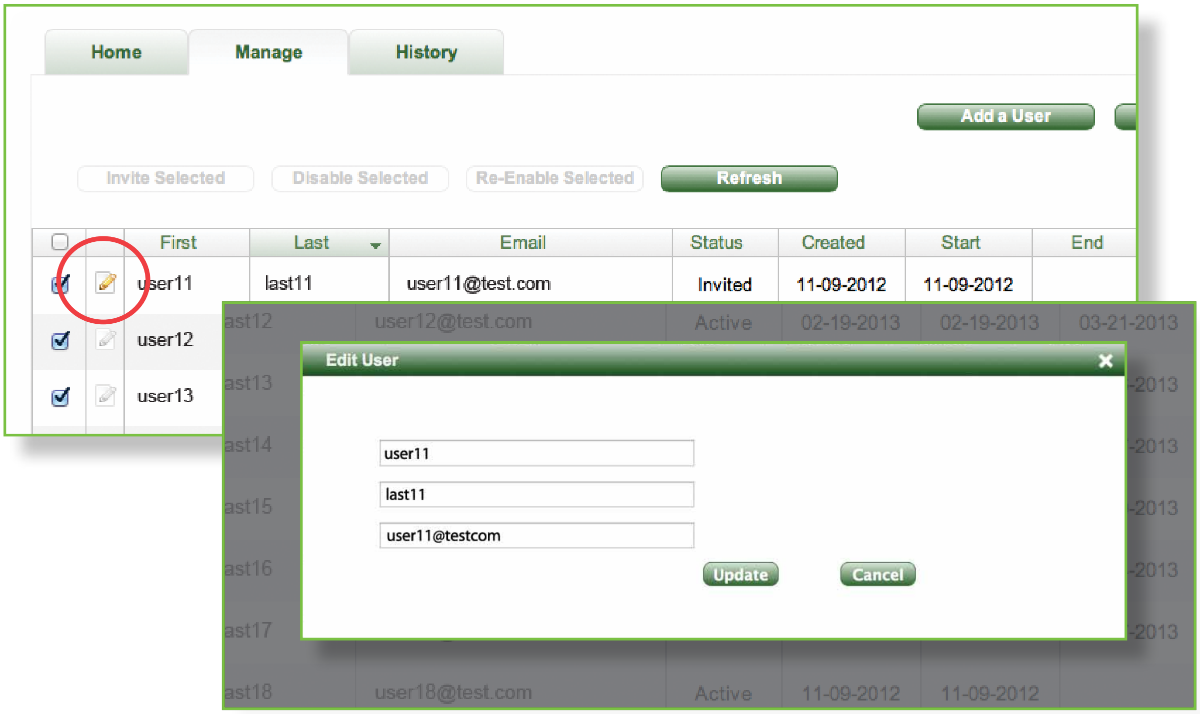
Best practice: Check to ensure the file uploaded properly.



Once a file has been uploaded, you can review any errors associated with the uploaded file on the History tab.

- Each imported file is shown in chronological order
- You can click on the "+" symbol to expand the row and view the detailed errors that prevented data upload for that file

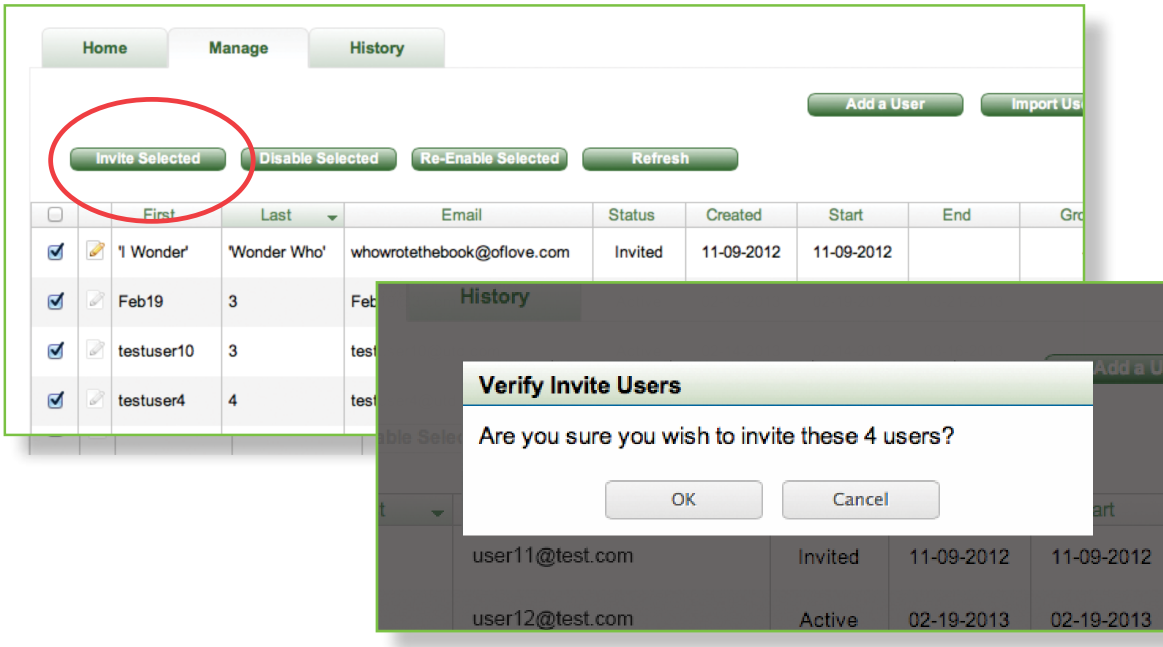
Best practice: **Check for incorrect user information.**



Since errors occur in data entry, the Subscriber Manager tool allows you to modify a user's first name, last name, and email address after entry.

- Click the "Edit User" icon next to a user name and a pop-up box will appear where you can modify the user's information
- Only "Created" or "Invited" users can have their information modified. The "Edit User" icon will be grayed out for those users who cannot have their information edited

Step 2: Invite clinicians to register for UpToDate access



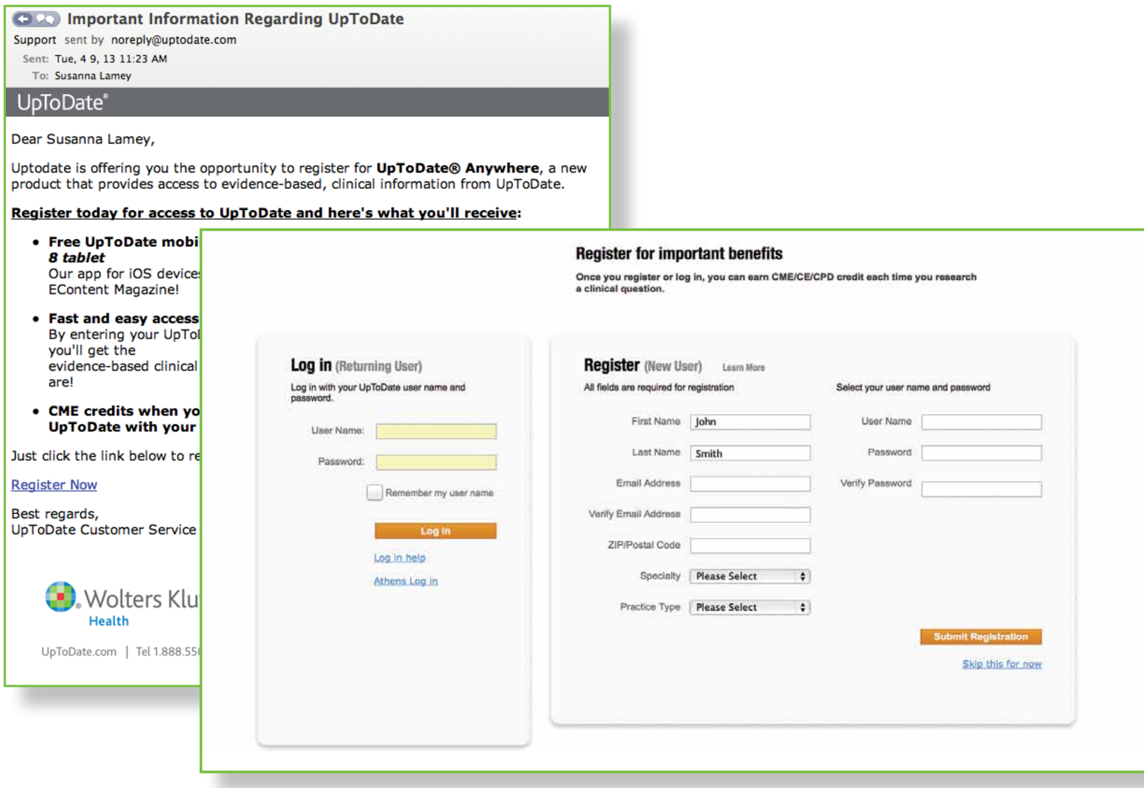
Once users have been added to the Subscriber Manager tool, they will be in "Create" status. To invite users to register for UpToDate access, simply click the check box next to each user for individual invitations or check "all users" for a group invitation. Then click the "Invite Selected" button. **Important note: you will be able to invite as many clinicians to register for UpToDate as contracted by your organization (i.e. # of licensed seats).**

Each invited user will receive an email invitation to register and create his or her individual UpToDate username and password. You will see the user's status change from "Created" to "Invited." Each email will have a unique link for one-time registration specific to the recipient.

Best practice: **Frequently re-invite the clinician to become a registered UpToDate user if their status does not change to "active." There is no limit on the number of invitations you can send each clinician.**

Step 3: Invited users register with UpToDate and receive full access

After you invite a user, an automated email will be sent by the Subscriber Manager tool to the invitee with instructions on how to register for UpToDate Anywhere.



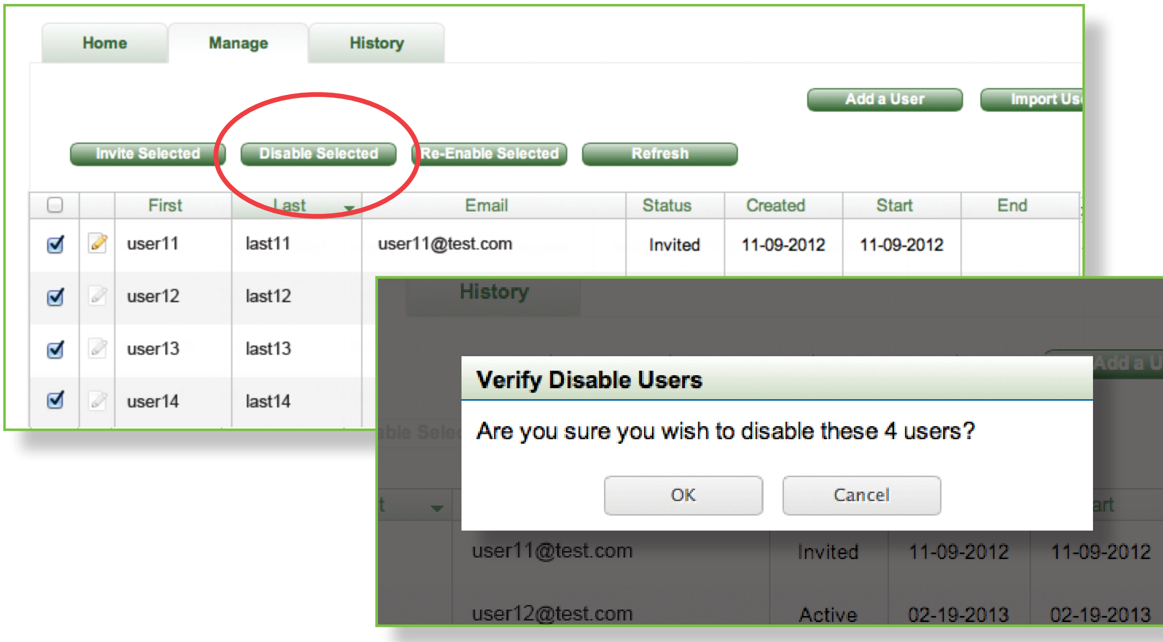
How it works:

- Email invite is specific to the end-user and contains a link to a registration page
- Link is only valid for 30 days and once consumed, cannot be shared with others
- Link brings user into the application and requires them to self-register or to log-in if the user has existing credentials to UpToDate
- On the self-registration portion of the page, the user's first name, last name, and email address are pre-loaded based upon the information the administrator has entered

Once a user completes the registration process or logs in with existing credentials, an automated email will be sent to the user confirming their registration and providing information on how to install the UpToDate Mobile App.

Best Practice: To maximize utilization of your UpToDate licensed seats, contact the Clinical Advocate at your institution and ask for his/her assistance in championing UpToDate registration and use.

Best Practice: Set-up a process to stay informed of clinicians who are no longer affiliated with your institution to disable their access right away and free up a seat.

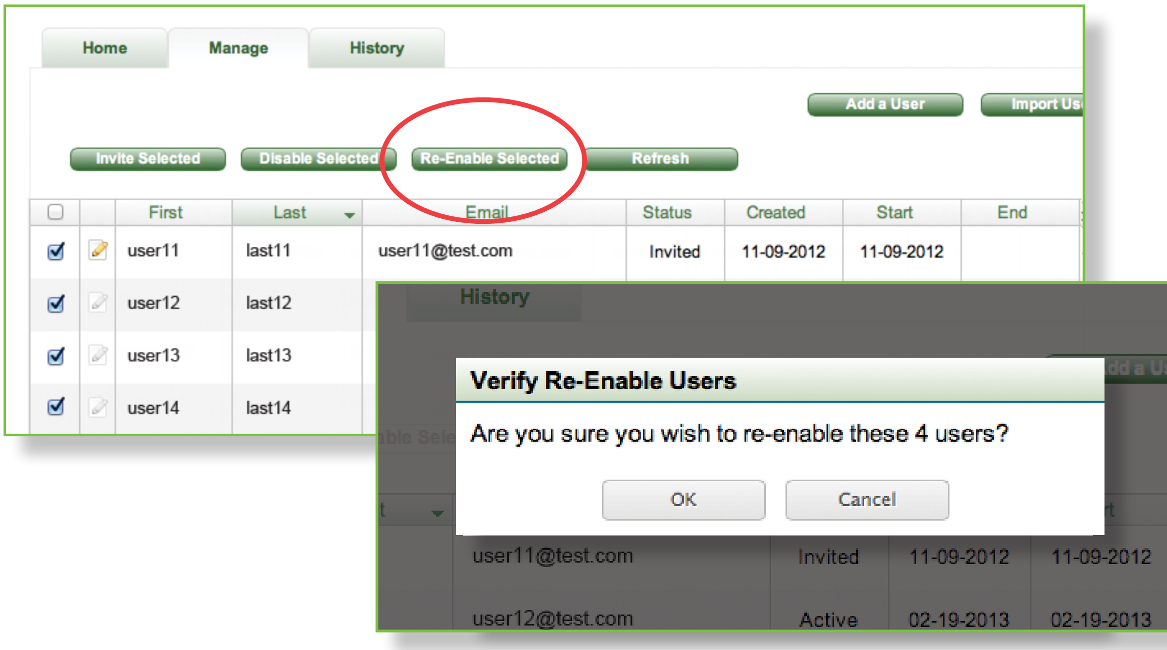


Once a user has left your institution, it's important to disable this user's access in order to maximize utilization of your UpToDate licensed seats. Disabling a user turns off user access rights to UpToDate and opens the licensed seat for re-allocation to a new user.

To disable a user:

- Select a user by checking the box by the user's name
- Click "Disable selected"
- Once users are disabled, the application sends the disabled user an email notification

Best practice: Rather than creating a new account for a returning disabled user, the user's account can simply be re-enabled.



To re-enable a user:

- Select a user by checking the box by the user's name
- Click "Re-enable selected"
- Once a user is re-enabled, a seat is consumed and the application sends the user an email notification

If you have any questions or need technical assistance, please don't hesitate to contact us by phone or email.

For technical support, please contact:
sitesupport@uptodate.com

1-888-804-8436 United States and Canada
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