

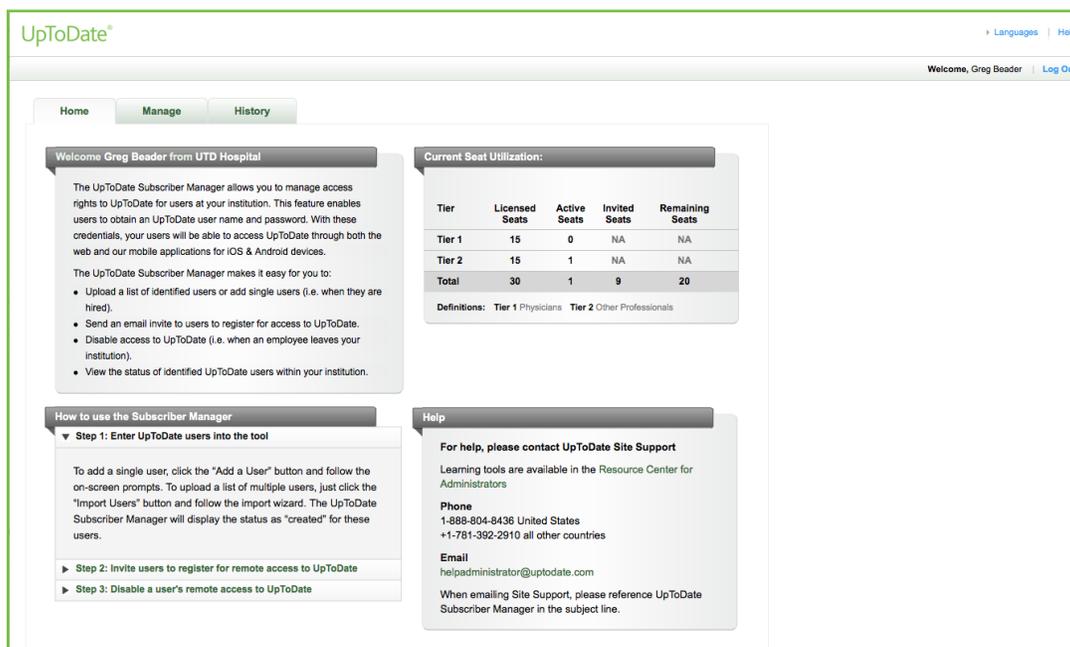
How to Use UpToDate® Subscriber Manager — Instructions and Best Practices

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:



The screenshot displays the UpToDate Subscriber Manager interface. At the top, there is a navigation bar with 'Home', 'Manage', and 'History' tabs. A welcome message for 'Greg Beader from UTD Hospital' is visible. The main content area is divided into several sections:

- Welcome Greg Beader from UTD Hospital:** A text box explaining the tool's purpose and providing a list of actions: 'Upload a list of identified users or add single users (i.e. when they are hired)', 'Send an email invite to users to register for access to UpToDate', 'Disable access to UpToDate (i.e. when an employee leaves your institution)', and 'View the status of identified UpToDate users within your institution'.
- Current Seat Utilization:** A table showing seat counts across different tiers.
- How to use the Subscriber Manager:** A section with three steps: 'Step 1: Enter UpToDate users into the tool', 'Step 2: Invite users to register for remote access to UpToDate', and 'Step 3: Disable a user's remote access to UpToDate'.
- Help:** A section providing contact information for UpToDate Site Support, including phone numbers and an email address.

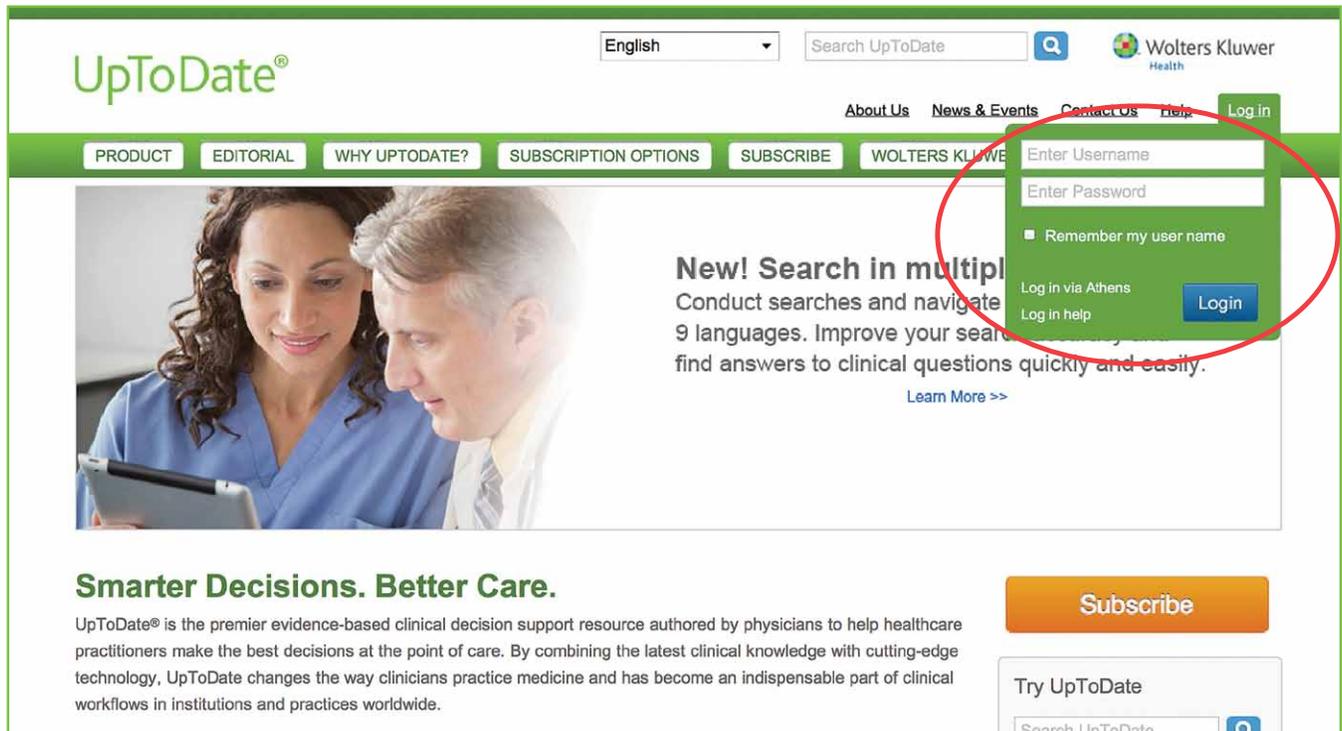
Tier	Licensed Seats	Active Seats	Invited Seats	Remaining Seats
Tier 1	15	0	NA	NA
Tier 2	15	1	NA	NA
Total	30	1	9	20

Definitions: Tier 1 Physicians Tier 2 Other Professionals

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.



The screenshot shows the UpToDate website interface. At the top left is the UpToDate logo. To its right is a language dropdown menu set to "English" and a search bar labeled "Search UpToDate". Further right is the Wolters Kluwer Health logo. Below these are navigation links: "About Us", "News & Events", "Contact Us", "Help", and "Log in". A green horizontal bar contains menu items: "PRODUCT", "EDITORIAL", "WHY UPTODATE?", "SUBSCRIPTION OPTIONS", "SUBSCRIBE", and "WOLTERS KLUWER". The main content area features a large image of two healthcare professionals looking at a tablet. To the right of the image is a promotional text: "New! Search in multiple languages. Conduct searches and navigate in 9 languages. Improve your search results and find answers to clinical questions quickly and easily." Below this text is a "Learn More >>" link. A login form is overlaid on the right side of the page, highlighted with a red circle. It contains fields for "Enter Username" and "Enter Password", a checkbox for "Remember my user name", and a "Login" button. Below the form are links for "Log in via Athens" and "Log in help". At the bottom left, there is a section titled "Smarter Decisions. Better Care." with a paragraph of text describing UpToDate as a clinical decision support resource. To the right of this section is an orange "Subscribe" button and a "Try UpToDate" search bar.

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 screenshot shows a user management interface with a table of users and a dialog box for adding a new user.

	First	Last	Email	Status	Created	Start	End	Group
<input checked="" type="checkbox"/>	user11	last11	user11@test.com	Invited	11-09-2012	11-09-2012		--
<input checked="" type="checkbox"/>	user12	last11	user11@test.com	Invited	11-09-2012	11-09-2012		--
<input checked="" type="checkbox"/>	user13	last12						--
<input type="checkbox"/>	user14	last13						--
<input type="checkbox"/>	user15	last14						--
	user16	last15						--
	user17	last16						--
	user18	last17	user18@test.com	Active	11-09-2012	11-09-2012		--
	user19	last18	user19@test.com	Active	02-25-2013	02-25-2013	03-27-2013	--

The "Add a User" dialog box contains the following fields and buttons:

- First Name:
- Last Name:
- Email Address:
- Buttons:

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.

The screenshot shows a user management interface with a table of users and an 'Import Users Wizard - Step 1' dialog box. The 'Import Users' button is circled in red. The dialog box provides instructions on how to create an import file in CSV format.

Import Users Wizard - Step 1

You can use an import file to create multiple users at one time. We'll guide you through this simple process.

Step 1. Create an import file

1. Open a text editor (like Notepad) or spreadsheet (like Microsoft Excel) program on your computer.
2. Enter one user per line in the following format: First Name, Last Name, Email Address.
For example:

```
John,User,John.User@someaddress.com  
Suzy,User,Suzy.User@someaddress.com
```
3. When finished, name your file and select "CSV (Comma delimited)(.csv)" as the file format in the "Save as type" dropdown. (Note: if using a text editor, you may need to change the file extension manually from ".txt" to ".csv" in the "file name" box.)
4. Click "Browse...", select the file you'd like to import, then click "Next".

User File (CSV): no file selected

	First	Last	Email	Status	Created	Start	End	Group
<input checked="" type="checkbox"/>	user11	last11	user11@test.com	Invited	11-09-2012	11-09-2012		
<input checked="" type="checkbox"/>	user12	last12						
<input checked="" type="checkbox"/>	user13	last13						
<input type="checkbox"/>	user14	last14						
<input type="checkbox"/>	user15	last15						
		last16						
		last17						
		last18						
		last19						
		last20						
		last21						
		last22	user22@test.com	Active	02-25-2013	02-25-2013	03-27-2013	

Best practice: Check to ensure the file uploaded properly.

The image displays two screenshots of a user import history interface. The top screenshot shows a table with columns Date, Admin, and Action. A red circle highlights a '+' icon next to the first row. The bottom screenshot shows the same table with the first row expanded to show a detailed error log table with columns Row # and Failure Reason.

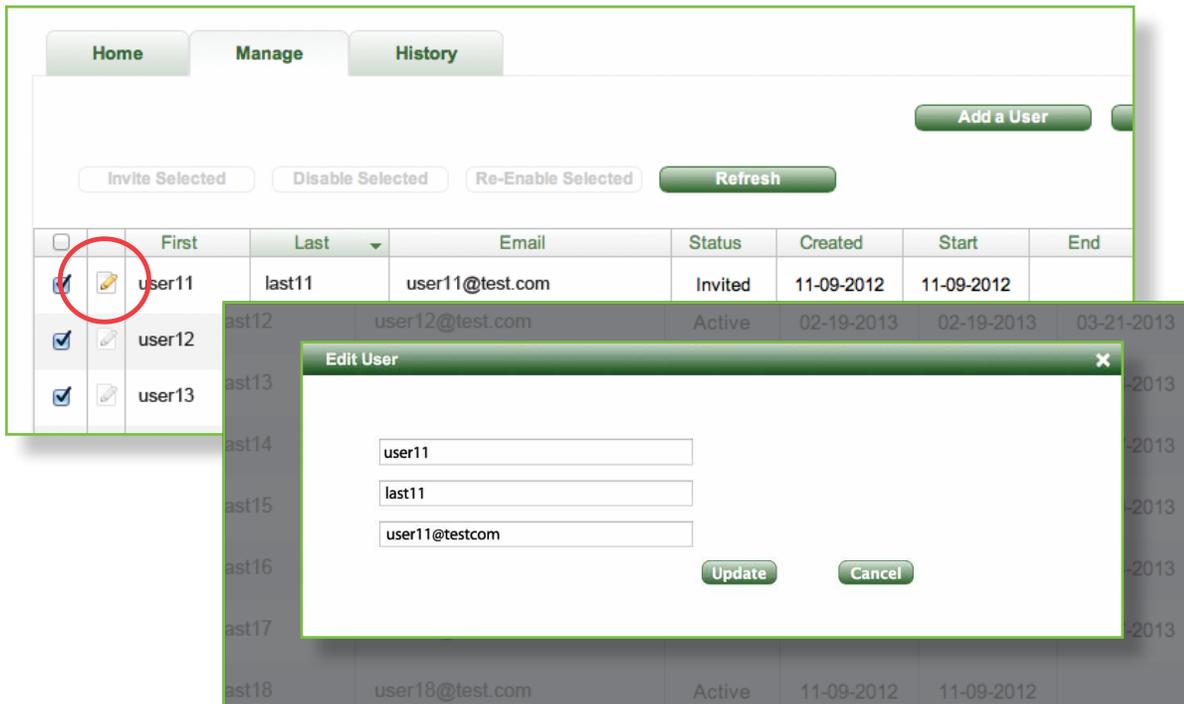
Date	Admin	Action
02-07-2013	Administrator One	User Import - Successful: 9 - Errors: 6 - File Name:format1.csv
01-04-2013	Administrator One	User Import - Successful: 3 - Errors: 0 - File Name:Sample EM file_2.csv
11-16-2012	Adm	
+	11-16-2012	Adm

Date	Admin	Action															
-	02-07-2013	Administrator One	User Import - Successful: 9 - Errors: 6 - File Name:format1.csv														
<table border="1"><thead><tr><th>Row #</th><th>Failure Reason</th></tr></thead><tbody><tr><td>2</td><td>Missing or invalid data</td></tr><tr><td>3</td><td>Missing or invalid data</td></tr><tr><td>5</td><td>Missing or invalid data</td></tr><tr><td>8</td><td>Email format is invalid</td></tr><tr><td>14</td><td>User already exists</td></tr><tr><td>15</td><td>Email format is invalid</td></tr></tbody></table>				Row #	Failure Reason	2	Missing or invalid data	3	Missing or invalid data	5	Missing or invalid data	8	Email format is invalid	14	User already exists	15	Email format is invalid
Row #	Failure Reason																
2	Missing or invalid data																
3	Missing or invalid data																
5	Missing or invalid data																
8	Email format is invalid																
14	User already exists																
15	Email format is invalid																
01-04-2013	Administrator One	User Import - Successful: 3 - Errors: 0 - File Name:Sample EM file_2.csv															
11-16-2012	Administrator One	User Import - Successful: 750 - Errors: 0 - File Name:LotsOfNewUsers-750															

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

Step 2: Invite clinicians to register for UpToDate access

The screenshot shows the Subscriber Manager tool interface. The 'Manage' tab is active, and the 'Invite Selected' button is circled in red. Below the buttons is a table of users with columns for First, Last, Email, Status, Created, Start, End, and Group. Four users are selected with checkmarks. A dialog box titled 'Verify Invite Users' is overlaid on the table, asking 'Are you sure you wish to invite these 4 users?' with 'OK' and 'Cancel' buttons.

	First	Last	Email	Status	Created	Start	End	Gr
<input checked="" type="checkbox"/>	1 Wonder'	'Wonder Who'	whowrotethebook@oflove.com	Invited	11-09-2012	11-09-2012		
<input checked="" type="checkbox"/>	Feb19	3	Feb					
<input checked="" type="checkbox"/>	testuser10	3	tes					
<input checked="" type="checkbox"/>	testuser4	4	tes					

Verify Invite Users

Are you sure you wish to invite these 4 users?

OK Cancel

user11@test.com	Invited	11-09-2012	11-09-2012
user12@test.com	Active	02-19-2013	02-19-2013

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

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.

The image shows an email invitation from UpToDate and a screenshot of the registration page. The email, titled "Important Information Regarding UpToDate", is addressed to Susanna Lamey and contains the following text:

Dear Susanna Lamey,

UpToDate is offering you the opportunity to register for **UpToDate® Anywhere**, a new product that provides access to evidence-based, clinical information from UpToDate.

Register today for access to UpToDate and here's what you'll receive:

- **Free UpToDate mobile tablet**
Our app for iOS devices and EContent Magazine!
- **Fast and easy access**
By entering your UpToDate user name and password, you'll get the evidence-based clinical information you need.
- **CME credits when you register**
Once you register or log in, you can earn CME/CE/CPD credit each time you research a clinical question.

Just click the link below to register:

[Register Now](#)

Best regards,
UpToDate Customer Service

Wolters Kluwer Health
UpToDate.com | Tel 1.888.555.4646

The registration page is titled "Register for important benefits" and includes the following sections:

- Log in (Returning User)**: A form with fields for "User Name" and "Password", a "Remember my user name" checkbox, and a "Log In" button. Links for "Log in help" and "Athens Log in" are also present.
- Register (New User)**: A form with fields for "First Name" (pre-filled with "John"), "Last Name" (pre-filled with "Smith"), "Email Address", "Verify Email Address", "ZIP/Postal Code", "Specialty" (dropdown menu), and "Practice Type" (dropdown menu). It also includes fields for "User Name" and "Password" with a "Verify Password" field. A "Submit Registration" button and a "Skip this for now" link are at the bottom.

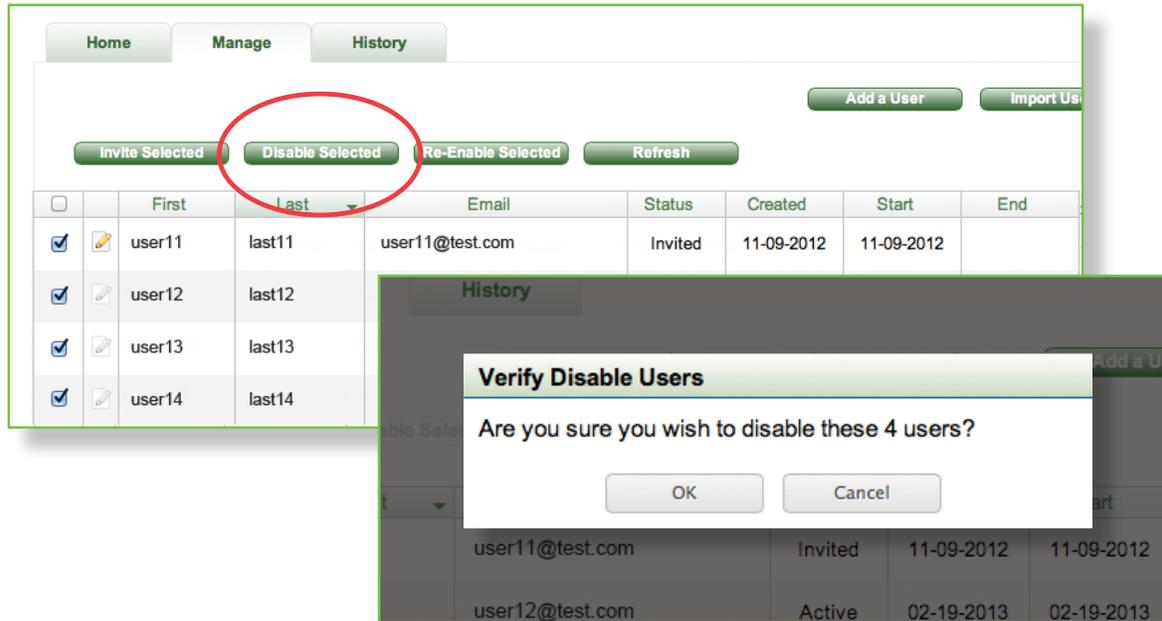
How it works:

- 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.

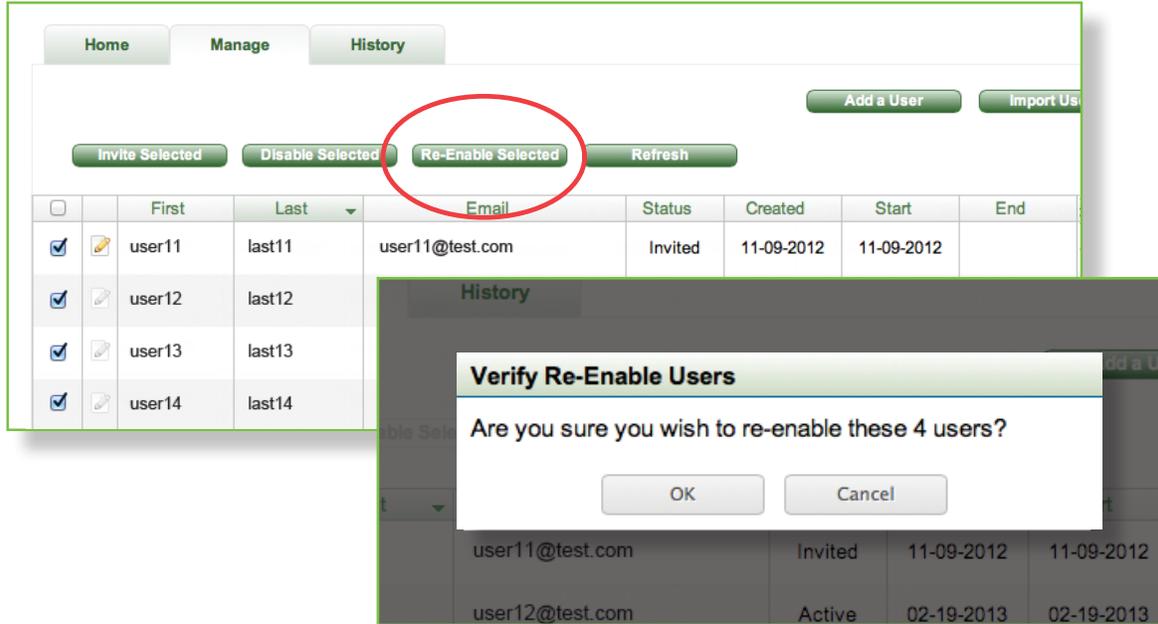


Once a user has left your institution, it's important to disable this user's access in order to maximize utilization of your UpToDate licensed seats. Disabling a user turns off user access rights to UpToDate and opens the licensed seat for re-allocation to a new user.

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

+1-781-392-2910 All other countries

UpToDate Account Support

enterprise@uptodate.com

1-888-550-4788 United States and Canada