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 staff to register and create a username and password. Once registered, users can access UpToDate by logging in to www.uptodate.com/login from any computer or by using the UpToDate Mobile App.

Step 1: Access the Subscriber Management dashboard

→ You will receive an order confirmation via email following the signing of your contract.

→ Visit uptodate.com/online.

→ Log in with the username and password provided to you in the order confirmation email.

→ Upon login, you will automatically be redirected to the Subscriber Manager tool.

The number of UpToDate seats available in your organization was determined at the time your organization obtained its subscription and is reflected in your contract. The Subscriber Manager tool provides a dashboard to keep you informed of seat utilization.

You can find and track the number of available seats in the "Home" tab.

Step 2: Create a distribution list

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.
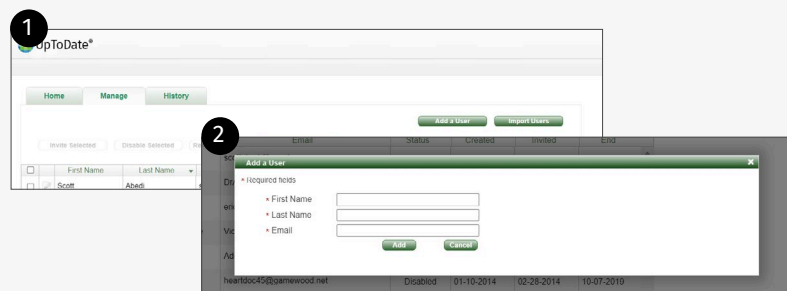

Add one user:

1. Click the "Manage" tab and select "Add a User" to prompt the "Add a User" pop-up.

2. Enter the user's first name, last name, and email address and select "Add".

Import a list of users:

1. Click the "Manage" tab and select "Import Users" to launch an import wizard.

2. Follow the instructions in the wizard to set up and import a tab-delimited or comma-delimited file.

3. **NOTE:** The file must include the user's first name, last name, and email address.

4. 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.
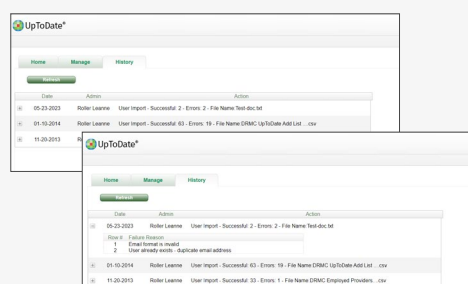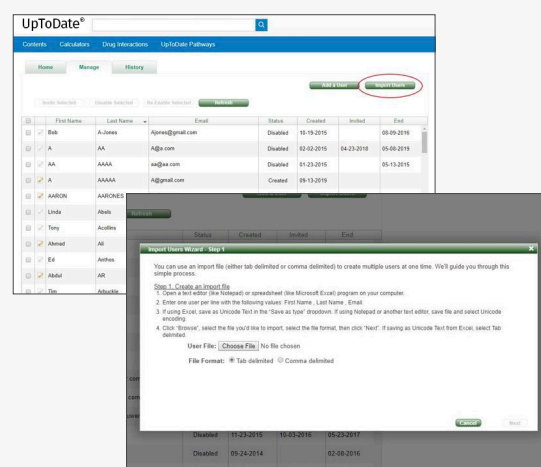

TIP: Once a file has been uploaded, check to ensure the file uploaded properly.

- ✓ Review any errors associated with the uploaded file on the "History" tab (each imported file is shown in chronological order).

- ✓ Click on the "+" symbol to expand the row and view the detailed errors that prevented data upload for that file.

You can modify a user's first name, last name, and email address after entry.

- ✓ Click the "Edit User" icon next to a username and a pop-up 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.

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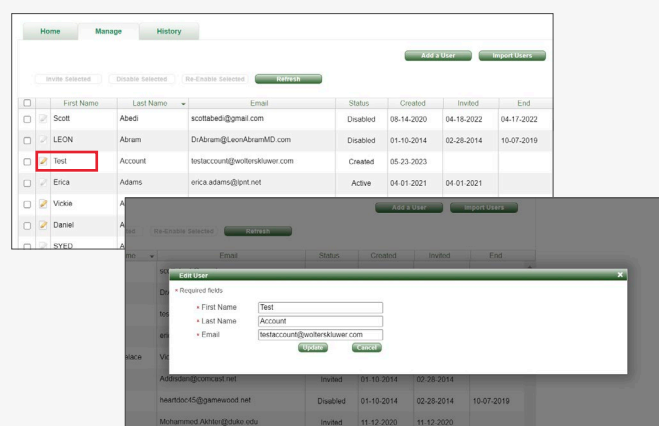
Step 3: Invite staff to register for UpToDate access

Once users have been added to the Subscriber Manager tool, they will be in "Create" status.
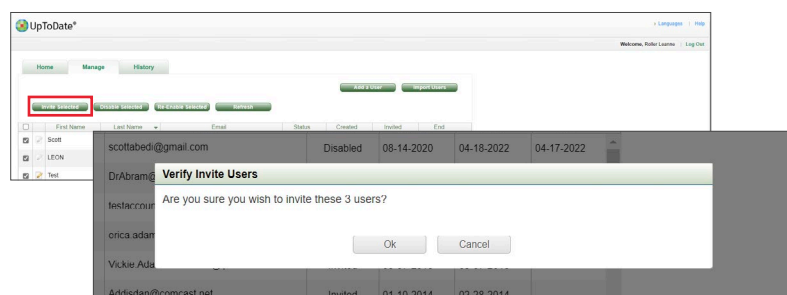
To invite users to register for UpToDate access:

1. In the "Manage" tab, click the check box next to each user for individual invitations or check "all users" for a group invitation.
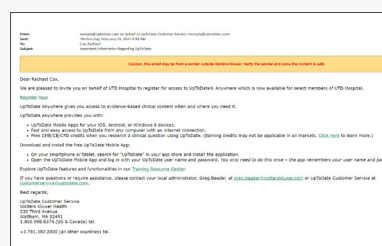2. Click the "Invite Selected" button.

> ⚠️ **Important note:** You will be able to invite as many staff members 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 their 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.

TIP: Frequently re-invite the staff member 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 staff member.

Step 4: Invitees register for UpToDate

How it works:

→ The email invite is specific to the end user and contains a link to a registration page that is valid for 30 days. Once consumed, it cannot be shared with others.

→ The registration link brings the user into the application to self-register or to log in if the user has existing credentials.

→ On the self-registration portion of the page, the user's first name, last name, and email address are preloaded based upon the information the administrator had 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.

Once users have been added to the Subscriber Manager tool, they will be in "Create" status.

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.


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Step 5: Monitor seat usage and access

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 that becomes available. It's important to disable the user's access in order to maximize utilization of your UpToDate licensed seats.

To disable a user:

1. Select a user by checking the box by the user's name.

2. Click "Disable selected".

3. Once users are disabled, the application sends the former user an email notification.
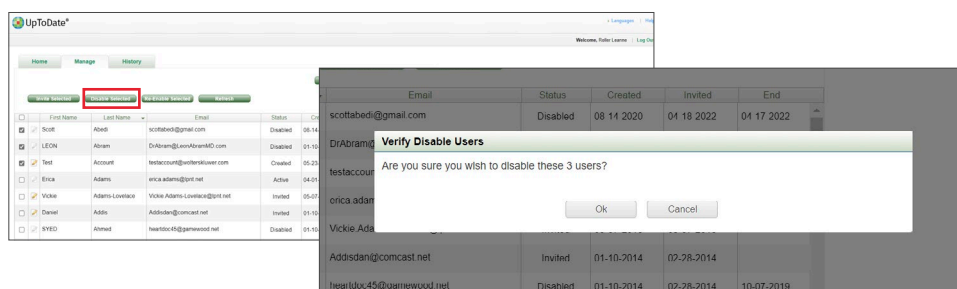
You can re-enable the user's account for returning previously enabled users rather than create a new one.

To re-enable a user:

1. Select a user by checking the box by the user's name.

2. Click "Re-enable selected".

3. Once re-enabled, the user will receive an email notification.
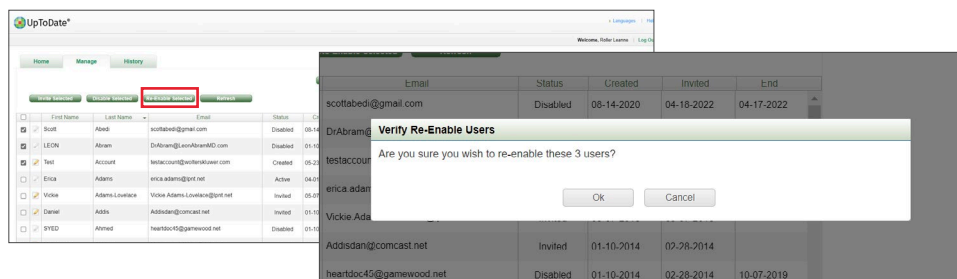
→ If you are the Subscriber Manager admin and would also like to access UpToDate as a user, you must create a separate user account with a different email address from your Subscriber Manager admin email address.

→ To do this, please add yourself as a user in the "Manage" section of the Subscriber Manager tool.

Customer Support

Technical Support

Call:
1-888-804-8436 United States and Canada
+1-781-392-2910 all other countries

Email: sitesupport@uptodate.com

General Account Support

Call:
1-800-998-6374 United States and Canada
+1-781-392-2000 all other countries

Email: customerservice@uptodate.com