# UpToDate®

# UpToDate Anywhere: Quick Start and Reference Guide

This Quick Start and Reference Guide outlines specific instructions on how to access UpToDate from a wide variety of access options including mobile apps; register for an account, and earn and redeem CME credits.



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## FAST & EASY ACCESS OPTIONS



UpToDate clinical decision support is as close as your smartphone, tablet, or computer. UpToDate Anywhere gives you access to evidence-based clinical content when and where you need it.

UpToDate Anywhere provides you with:

- UpToDate Mobile App for your *iOS* devices, Android<sup>™</sup> device, or Windows 8 device. Our App for iOS devices was chosen as one of "The Best Apps in Publishing" by EContent Magazine.
- Fast and easy access to UpToDate from any computer with an internet connection.
   With your user name and password, you'll get the evidence-based clinical information you need from home, the office or wherever you are!
- Free CME/CE/CPD when you research a clinical question using UpToDate onsite or remotely including on your mobile device.

# **Getting Started**

Getting Started with UpToDate Anywhere access is easy. Since healthcare organizations provide different ways for users to access UpToDate, please refer to the options below to identify the best method for you to register to get UpToDate Anywhere access.

# How do you access UpToDate?

There are several ways you can access UpToDate from within your institution. Please use the chart below to identify the easiest path for you to register to get UpToDate Anywhere access.

## EHR/EMR System:

Access UpToDate from your EHR/EMR

Once you access UpToDate, you will be prompted to either Log-in or Register, or you can initiate the process by clicking the My Account tab found in the navigation bar.

Log in with an **existing** UpToDate user name and password OR complete the one-time registration process and create a **new** user name and password.

Once registered, you will receive an email from UpToDate with instructions on downloading the UpToDate Mobile App.

## Clinical Portal:

Physician Portal
 Library/Nursing Portal
 Other
 Access UpToDate through your secure portal access point.

Learn more in Section 1, page 7

Learn more in Section 1, page 7

## Web Browser:

You can also register for UpToDate Anywhere access from any computer with internet access, with an IP address registered to your institution, from the UpToDate website: **www.uptodate.com** 

Learn more in Section 2, page 9

Once you access UpToDate, you will be prompted to either Log-in or Register, or you can initiate the process by clicking the My Account tab found in the navigation bar.

Log in with an **existing** UpToDate user name and password OR complete the one-time registration process and create a **new** user name and password.

Once registered, you will receive an email from UpToDate with instructions on downloading the UpToDate Mobile App.

When the New Search page launches, click the Log-in/ Register button in the upper right hand corner of the screen.

Log in with an **existing** UpToDate user name and password OR complete the one-time registration process and create a **new** user name and password.

Once registered, you will receive an email from UpToDate with instructions on downloading the UpToDate Mobile App.

# Forgot your user name or password?

- 1. Go to www.uptodate.com.
- 2. Click the **Log-in** link found in the top right-hand corner of the page.
- 3. In the Log-in box, click the 'Log-in Help' link and follow the on-screen prompts.
- 4. You'll receive an email that contains your user name and a link to reset your password.

If you need further assistance, please call Customer Service at 1.800.998.6374 (US/Canada) or +1.781.392.2000 (All other countries).

## **GETTING REGISTERED**

Registering for an UpToDate account and creating a unique user name and password allows you to earn and redeem CME/CE/CPD credit, access the UpToDate Mobile App, and log in directly to <u>www.uptodate.com</u> from any computer with internet access.

## Section 1:

# Register in UpToDate from a Link within an EHR/EMR or Portal

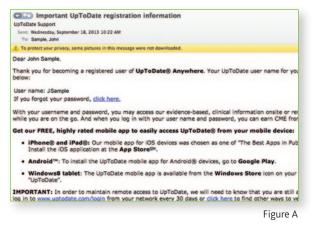
If your institution provides access to UpToDate through a link within an EHR/EMR or portal, you will want to register through this integrated link. This will ensure that any consultations within UpToDate and the resulting CME/CE/CPD credits will all be tracked together in one account.

The first time you access UpToDate from your EHR/EMR or portal, you will see the *Log in* or *Register* page shown below. You can log in with an existing UpToDate user name and password or register as a new user and create a user name and password.

	Register for importan Once you register or log in, yo time you research a clinical ou	ou can earn CME/CE/CPO credit each
Log in (Reserving they) to provide Victory are rear and an end of the service Preservice Preservice International Systems International Systems Internatio	* feets an waived * feet have * Last have * Small Address * Small Address * Small Address * Simplify Costs * Let Costs	territori Stor (Here User) - Lean size en regulari en
o register, compl	NPT Number Den I inne voor NPT+? Leok.d.up * 5	dy Dinal Passacriti Doce Doce Doce Doce Doce Doce Doce Doce

Submit Registration.

Upon completion of registration process, you will receive an email from UpToDate with instructions on downloading the mobile app.



**Best Practice:** When logging in to your EHR/EMR or Clinical Portal, click on the UpToDate link. The first time you access UpToDate from this link you will be brought to the *Log in* or *Register* page. Register your personal information the **first** time you see the *Log in* or *Register* page.

**Troubleshooting Tip:** When in the EHR/EMR or Clinical Portal, if you have by-passed the *Log in* or *Register* page previously, you may return at any time by clicking the My Account or CME tab in the navigation bar.

UpToDate					All Topics	
New Search	Patient Info	What's New	Calculators	CME	My Ac	count

## Section 2:

# Register from a Non-integrated Link (outside of EHR/EMR or Portal)

If your institution does not provide access to UpToDate through an EHR/EMR or portal link, or if you do not access the EHR/EMR readily during your daily workflow, you may register from a computer within your organization's network. Open an Internet browser and go to the New Search page of the UpToDate website: www.uptodate.com/online.

UpToDate" New Search Patient Info What's	New Calculators	Register/Log in
	New Search:	Search in another language
	Drug Interactions	- All Topics

When the New Search page launches, click the Register/Login button in the upper right hand corner of the screen.

To register, complete all fields and then click *Submit Registration*.

	Register for importa Once you register or log in, y time you research a clinical of	ou can earn CME/CE/CPO credit each
Log in (Returning User)	Register (New User)	Lauri Hari
Log in with your UpToDate user name and password.	* fields are required	Select your user name and password
User Name:	*First Name John	"User Name isample
Passwort	"Lost Name Sample	
Remember my user	*Emeil Address	Submit Registrat
nama	* Verify Email	
togti	* ZIP/Postal	
Log in help	Code * Specialty Please Se	and a
Athens Log. in		
	*Practice Type Please Se	lect 0
	NPI Number Den't know your NPE#7 Leok 8 up	

Once registered, you will receive an email confirmation with instructions on how to access the Mobile App. See Figure A (on page 8) for an example of the welcome email

# Section 3:

# Already have an UpToDate User Name and Password?

You may already have an existing user name and password from:

- an individual subscription
- previous UpToDate access through an EHR/EMR or clinical portal

If you already have a user name and password, getting UpToDate Anywhere rights is easy. Just log in with your existing credentials from within your site's network and you'll receive an email informing you that you now have UTD Anywhere rights and and instructions on how to download the Mobile App.

**Note:** Instructions for migrating from an individual subscription to UpToDate Anywhere follow in Section 4.

# Section 4:

# Migrate from an UpToDate individual subscription to UpToDate Anywhere

When your individual account expires, simply log in to UpToDate from within your institution's network and enter your individual subscription user name and password. This will transfer your individual account automatically to the account maintained by your institution's enterprise license. There will be no change to your account and you will retain all of your CME/CE/CPD records.

If you would like to cancel an individual subscription and use only your institutional/ enterprise access, UpToDate policy allows any individual subscriber to receive a full refund when canceling within the first 60 days of their subscription. If your individual subscription is within the initial 60-day period, please call UpToDate Customer Service at 1.800.998.6374 (US/Canada) or +1.781.392.2000 (All other countries) to request a refund and cancel your subscription.

**If you leave your employer,** your CME/CE/CPD credit and UpToDate account will remain active for 4 months and you will be able to process and retrieve any existing CME/CE/CPD in your account. To continue accessing UpToDate content, you could purchase an individual subscription or access UpToDate from another organization with an UpToDate enterprise license.

# **MOBILE ACCESS**

Once you are registered for UpToDate Anywhere access with a unique user name and password, you can install the UpToDate Mobile App on up to two devices. For a full list of devices currently supported, please visit www.uptodate.com/home/uptodate-mobile-access.



## Section 1:

# Download and install the UpToDate Mobile App

UpToDate Mobile App features include:

- Access to the full UpToDate clinical content
- Enhanced search functionality (bookmarks, auto-complete, search history and filters)
- Clinical calculators optimized for mobile use

To download the mobile app, follow these steps:

- On your smartphone or tablet, search for "UpToDate" in your app store and install the application. The application is free to install.
- **2.** Open the UpToDate Mobile App upon completion of download.
- **3.**Log in with your UpToDate user name and password.

# MOBILE APP FREQUENTLY ASKED QUESTIONS

## Q: Can I access the UpToDate App on more than one device?

A: You may log in to the UpToDate App on two mobile devices. Your computer is not considered a mobile device, so you can download the UpToDate App on two mobile devices (smartphones or tablets) and then also access UpToDate on your computer.

# Q: How do I change the devices on which I access the UpToDate App?

- A: You can make changes to your devices two ways:
  - 1. Log out of a device by going to *Settings* then *Account Info*

or

- 2. Complete the following steps:
  - a. Log in to your UpToDate account from a computer (this cannot be done on a mobile device).
  - **b.** Select the *My Account* tab and click *Manage My Devices*.



**c.** You will see a list of your current mobile devices. Select De-activate (logout) to remove a device.

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New Search Patient Info Wh	ans New Calculators CME 28.0 My Accou		
My Account > Manage My De	uices		
Contest information Subscription CMECCICPIO User Name/Password Account Access Points	Manage My Devi These are the computers and de	Ces wices currently linked to your account. Last Used	Action @
Consolidate Accounts		Jul 25, 2013	
			De-activate (logoul)
Download Center Manage My Devices	D Pad 0	Nov 19, 2012	De-activate (logovit)

- **3.** You can now download the UpToDate App on a new device and log in to access content.
- Q: How far back can I view my search history on a mobile device?
- A: You will see your past 100 entries when you select the History icon on your iOS or Android device. The UpToDate App for Windows 8 does not currently capture history.
- Q: Can I change my user name or password from the Mobile App?
- A: No, users are only able to change their user name and/or password on a computer.
- Q: What CME functions can be completed on the Mobile App?
- A: Users accrue CME credit while using the Mobile App to answer clinical questions; however, to redeem your credits you must login to your UpToDate account online via a desktop or laptop computer.

# **MAINTAINING ACCESS**

In order to maintain uninterrupted access to UpToDate Anywhere, you must periodically re-verify your affiliation with your institution.

To re-verify, simply log into UpToDate from within your institution's network once every 30 days. Most users do this throughout their usual work activity, thereby continuously re-verifying their access during their day-to-day use of UpToDate.

Re-verification can be done from a computer or a mobile device as long as that computer or device is connected to your organization's Wi-Fi or VPN network.



# EARNING & REDEEMING CME/CE/CPD CREDITS

# Section 1: CME/CE/CPD Overview

UpToDate is accredited and recognized by colleges, associations, and authorities from around the world, and is a globally accepted information resource and learning tool.

- You may earn CME/CE/CPD credit when you research a clinical question using UpToDate.
- No tests, fees, or use of a third-party provider are required.
- Credits are organized by month and can be redeemed for up to two years.
- You can redeem your credits at your convenience
   24 hours a day, 7 days a week.
- You can also view and print previous CME/CE/CPD submissions at any time, provided that your UpToDate access is active either through your institution or through an individual subscription.

See page 23 to review the types of CME/CE/CPD credit available through UpToDate.

# Section 2:

# Earning and tracking CME/CE/CPD credits

When a clinical question is researched, UpToDate tracks both the search activity and the time spent reading topics.

You can customize how you earn CME/CE/CPD at any time in the CME tab within your account. Selecting *View/Change My Settings* allows you to select to earn credits or document hours accredited by associations and authorities around the world. With this flexibility, UpToDate fulfills a variety of continuing education requirements for clinicians around the world.

New Search Patient Info What's	New Calcu CME 26.0 kccount
My Account + CME/CE/CPD + 1	/iew/Change My Settings
Contact Information Subscription CME/CE/CPD Process My CME/CE/CPD View My Past Submissions	Current Setting for John Sample
View/Change My	Settings C Mainpro®-M1 Credit
Accreditation Statements     CME/CE/CPD FAQS	Physician Assistants and other non-MD/DO clinicians
User Name/Password Account Access Points Consolidate Accounts	Time-based tracking (RACSP, RACP, RAN2COG) Colegio de Medicina Interna de México. A.C. (CMM) Federación Mexicana de Colegios de Obstetricia y Ginecología, A.C. ( Mexicano de Especialistas en Ginecología y Obstetricia, A.C. (COMEC
Download Center Manage My Devices	5ds

## Note:

See www.uptodate.com/home/cmececpd-accreditations for the most current list.

To see how you can use UpToDate to fulfill continuing professional development requirements in your country or specialty, please see page 23.

Watch a demo (or read the demo transcript) on easy tracking and free redemption of CME/CE/CPD credits through UpToDate.

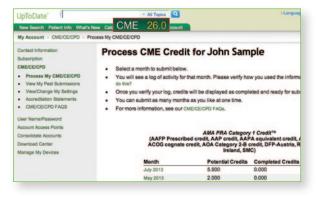
www.uptodate.com/help/demo/web/cme

# Section 3:

# Redeem your CME/CE/CPD credits

You may redeem as many or as few credits as you choose. Credits can be processed online for up to two years.

Click the CME tab to view and process credits you have accrued.



Follow the steps below to submit credits.

## Step 1:

Notice within each month listed below there is a column for Potential Credits and a column for Completed Credits.

The first step is to move the appropriate credits you want to submit from the Potential Credits column to the Completed Credits column.

Click the month that contains the credits you want to submit.

		AAPA equivalent credit, ACI 2-B credit, DFP-Austria, RCP	
Month	Potential Credits	<b>Completed Credits</b>	Submit 🗆
uly 2013 🔂	5.500	0.000	
May 2013	2.000	0.000	0
April 2013	0.500	0.000	0
November 2012	1.000	0.000	0
October 2012	2.000	0.000	

## Step 2:

When you click on a specific month, you will be brought to the documentation screen where you will provide the following information: the type of information you searched and the way you applied this information to your practice.

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Click the appropriate boxes that best describe your research in UpToDate.

Notice when you complete your selection, the box turns from green to white and the number of credits changes from zero to .5 to indicate these credits are now available for submission.

## Step 3:

ul 2 1:4 Click the Save button at either the top or bottom of the screen.

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Availa	ble Credits	5	Save		
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 Source	Search terms/Clinical guestion	Topic(s) Reviewed	I searched for information about (Check one):	How did you apply the information to your practice? (Check one):	Credit
WEB (UpToDate Individual Web)	AIDS-related cryptococcal meningpencephalitis	11:42:11AM GMT Treatment of cryptococcal meningpercephalits in HIV-infected patients 11:40:27AM GMT Treatment of cryptococcal meningpercephalits and disaeminated infection in HIV seronegative patients	Clinical manifestations Disgnosis Treatment Prognosis Prevention	This modified my plan This reinforced my plan Ineed more information	0.5

## Step 4:

After you click the Save button, you will be brought back to your Process CME page and you can select the Completed Credits you would like to submit by clicking the box in the Submit column and then clicking the Continue button at the bottom of the page.

rtact information	Pre	Process CME Credit for John Sample						
biscription		r roote one orean for our rampie						
IE/CE/CPD	<ul> <li>Select a month to submit below.</li> </ul>							
Process My CME/CE/CPO View My Past Submissions	<ul> <li>You will see a log of activity for that month. Please verify how you used the information in practice on that?</li> </ul>							
ViewChange My Settings								
Accreditation Statements		You can submit as many months		ond in caroney is	autominants.			
CNE/CE/CPD FAQS		For more information, see our CII	Contraction of the second s					
or Nama/Paseword					Submit V			
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nage My Devices			Ireland, SM	IC)				
		Month	Potential Credits	Completed Cre				
		July 2013	5.500	0.500	0			
		May 2013	2.000	0.000				
Norton		April 2013	0.500	0.000				
1611963		November 2012	1.000	0.000	0			
		October 2012	2.000	0.000	0			
	_	hds 2012	1.000	0.000				
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		ts you would like to receive only those credits he/she act		ional				
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Change credit setting		_						
		processing: Cancel Co	0					
Submit checked cree								
Submit checked cree		processing: Cancel Co	Continue					

## Step 5:

You will be brought to the CME Evaluation page where you will be asked to provide answers to several survey questions.

Once you have finished answering the questions, click Submit.



## Step 6:

Review the verification page and if all is correct, click Submit.

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Contact Information		ur CME submission request:	
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CMEICE/CPD FAQS	Carole S	Submit	

## Step 7:

You will be brought to the CME Confirmation page where you can choose to View or Print your certificate.

UpToDate'		Al Topice	+ Languages About Us Cor
New Search Patient Info What's	New Calculators ONE 2	G.O My Account	
My Account + CNE/CE/CPO + N	erity Your Submission Reque	at .	
Contact Information	CME Request Confirmation		
Subscrption GME/CE/CPD • Process My CME/CE/CPD • Vew My Past Submissions • Vew/Change My Settings • Accerdization Dataments • CME/CE	Name: Activity Dates: Credit Type: Amount: Certificate number: Process Date:	credit, ACA Category 2-8 credit, 0.500 53271500 September 17, 2013	redit, AAPA equivalent credit, ACEP credit, ACC DFP-Austria, RCPSC, CPD-Ireland, SMC)
User Nama#		icate for your files	s: View/Print Certificate
Account Access Porns Consolidate Accounts Download Center Manage My Devices	This certificate	and the associated logs will be s view old logs or raprint a certification	toned for your future reference

Print your certificate and submit it to the appropriate licensing organization or you can attach it as a PDF and email it.

Once you've processed your CME/CE/CPD credits, your certificate is automatically stored within your submission history. Certificates may be downloaded and reprinted at any time, provided that your UpToDate access is still active.

# CME/CE/CPD FREQUENTLY ASKED QUESTIONS

# Q: Is there a processing fee for the credit certificate?

A: No, there is no processing fee for certificates.

# Q: Can I earn CME/CE/CPD credit while using UpToDate on a mobile device?

- A: Yes, CME/CE/CPD credit accrues when using UpToDate via mobile web or the UpToDate Mobile App. However, to redeem your credits, you must log in to your UpToDate account online via a desktop or laptop computer.
- Q: Can I submit my online, EHR/EMR, Clinician Portal, and mobile access credits at the same time to receive a single certificate?
- A: All credits will be automatically updated to your online account when you have an Internet connection.

# Q: What happens to credits that I haven't redeemed?

**A:** Potential and completed credits from months that were not submitted are saved for up to two years.

# Q: Do my credits expire?

A: As long as your subscription remains active, credits or contact hours may be redeemed for up to two years from the time they were accrued. Any credits that were redeemed are saved for as long as you have access to your UpToDate subscription. If your subscription expires, you have four months to submit saved months of credit for a certificate.

# Q: What date will be on my certificate?

A: The certificate will show the range of dates (from first date to last) of the logs you are submitting.

For more information on CME/CE/CPD offered by UpToDate, please visit www.uptodate.com/home/ earning-cme-ce-cpd-credit-uptodate.

# Continuing Education

# UNITED STATES OF AMERICA

UpToDate is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians.

### American Medical Association

UpToDate designates this Internet point-of-care activity for a maximum of 0.5 AMA PRA Category 1 Credit(s)<sup>TM</sup>. Physicians should claim only credit commensurate with the extent of their participation in the activity.

There is no limit to the number of Internet point-of-care cycles that physicians may complete using UpToDate.

## American Academy of Family Physicians

This point-of-care activity, UpToDate, has been reviewed and is acceptable for up to 20 Prescribed credits by the American Academy of Family Physicians. AAFP certification begins October 31, 2013. Term of approval is for one year from this date. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

You may earn 20 Prescribed credits per year using UpToDate. Credit earned over that amount may be used toward AAFP Elective credit.

### American Academy of Nurse Practitioners

UpToDate is approved as a provider of nurse practitioner continuing education by the American Academy of Nurse Practitioners: AANP Provider Number: 051212.

For each hour of participation with the program, NPs can claim 1.0 contact hour. UpToDate automatically tracks the time you spend using the service.

### American Academy of Pediatrics

This continuing medical education activity has been reviewed by the American Academy of Pediatrics and is acceptable for a maximum of 50.00 AAP credits. These credits can be applied toward the AAP CME/ CPD Award available to Fellows and Candidate Members of the American Academy of Pediatrics.

### American Academy of Physician Assistants

AAPA accepts certificates of participation for educational activities certified for Category I credit from AOACCME, Prescribed credit from AAFP, and AMA PRA Category 1 Credit(s)™ from organizations accredited by ACCME or a recognized state medical society. Physician assistants may receive a maximum of 0.5 hours of Category I credit for completing each Internet point-of-care learning cycle.

### American College of Emergency Physicians

Approved by the American College of Emergency Physicians for a maximum of 30 hour(s) of ACEP Category I credit.

### American College of Obstetricians and Gynecologists

The American College of Obstetricians and Gynecologists has assigned up to 0.50 cognate credit per Internet point-of-care learning cycle.

There is no limit to the number of Internet point-of-care learning cycles that physicians may complete using UpToDate.

#### American Osteopathic Association

UpToDate has been approved by the American Osteopathic Association for unlimited AOA Category 2-B credit.

#### AUSTRALIA/NEW ZEALAND

#### Australasian College for Emergency Medicine

Time spent participating in UpToDate may be used to fulfill the Continuing Medical Education (CME) requirements of the ACEM CPD Program either as Practice Related CME or e-Learning Activities (0.5 points per hour reading).

#### **Royal Australian College of General Practitioners**

Time spent reading UpToDate may be claimed on the basis of 2 points per hour in the Self Recorded Activities category of the RACGP QI & CPD Program.

#### **Royal Australasian College of Physicians**

RACP Fellows who read UpToDate are eligible to claim 1 credit per hour toward Category 6 requirements of the RACP MyCPD Program.

# Royal Australian and New Zealand College of Obstetricians and Gynaecologists

Time spent reading UpToDate may be claimed on the basis of 1 point per hour in the Self-Education category of the RANZCOG CPD Program.

#### **AUSTRIA**

#### **Austrian Academy of Physicians**

The Austrian Academy of Physicians of the Austrian Medical Chamber recognizes programs accredited by the Accreditation Council for Continuing Medical Education (ACCME). Physicians may submit their credits earned from UpToDate toward their DFP e-learning requirements. One credit earned from UpToDate is equal to 1 DFP point.

#### CANADA

#### **College of Family Physicians of Canada**

This program meets the accreditation criteria of the College of Family Physicians of Canada and has been accredited for up to 0.5 CFPC Mainpro<sup>®</sup>-M1 Credits per Internet point-of-care learning cycle. You may earn up to 15 CFPC Mainpro<sup>®</sup>-M1 Credits per year for this category of electronic CME/CPD activity.

#### Royal College of Physicians and Surgeons of Canada

Use of UpToDate may be recorded on the basis of .5 credits per activity in Section 2 (Scanning) of the Royal College Maintenance of Certification (MOC) Program.

#### **IRELAND**

Certificates from the ACCME-accredited activity UpToDate are recognized by the Postgraduate Medical Training Bodies in Ireland and can be recorded as External CPD. Each learning cycle accumulates 0.5 credits.

#### **MEXICO**

#### Colegio de Medicina Interna de México A.C. (CMIM)

The Colegio de Medicina Interna de México A.C. recognizes UpToDate as a source of information and analysis that leads to optimum clinical practice, and is in line with the CMIM objectives for continuous education in Internal Medicine. For time spent consulting UpToDate, participants will accrue up to 10 minutes per topic per visit. Certificates generated by UpToDate are fully recognized by CMIM and may in turn be submitted to Consejo Mexicano de Medicina Interna, A.C. as CME activities for recertification purposes at the point value set by their current statutes.

#### Federación Mexicana de Colegios de Obstetricia y Ginecología, A.C. (FEMECOG) and Colegio Mexicano de Especialistas en Ginecología y Obstetricia, A.C. (COMEGO)

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Notes:

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