

## Paperless Proficiency Testing

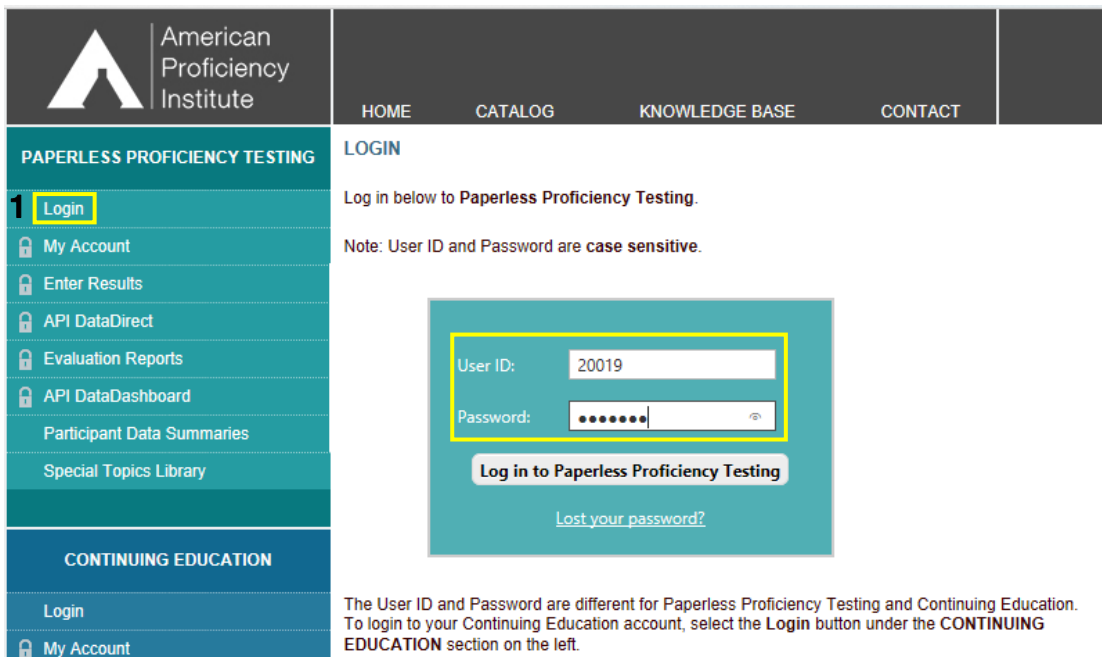
### Sub-User Accounts

Because there can only be one primary accountholder, API offers the Sub-User Account feature, which allows you to create sub-accounts with special permissions for other lab personnel. There are two types of Sub-User Accounts that can be created: a Sub-User with Supervisory Rights and a non-supervisory Sub-User.

- Sub-Users with Supervisory Rights have the ability to **review and submit results for all sample sets**. They will receive the same reminder emails as the primary accountholder, excluding tracking number emails. They will receive due date reminders if that option is selected during account creation. They are also able to create other Sub-User accounts, as well as delete and edit non-supervisory Sub-User accounts.
- Non-Supervisory Sub-Users are **only able to enter and save results for sample sets that have been assigned to them** by the primary accountholder or a Sub-User with Supervisory Rights. ***Once a Non-Supervisory Sub-User enters and saves results, they are considered “locked” and can only be unlocked by the primary user or a Sub-User with Supervisory Rights.*** They will receive limited email notifications regarding the account and will only receive due date reminders if that option was selected during the account set-up. They cannot edit their own accounts or any other Sub-User accounts. **Non-Supervisory Sub-Users cannot submit any results, even if the test is assigned to them.**

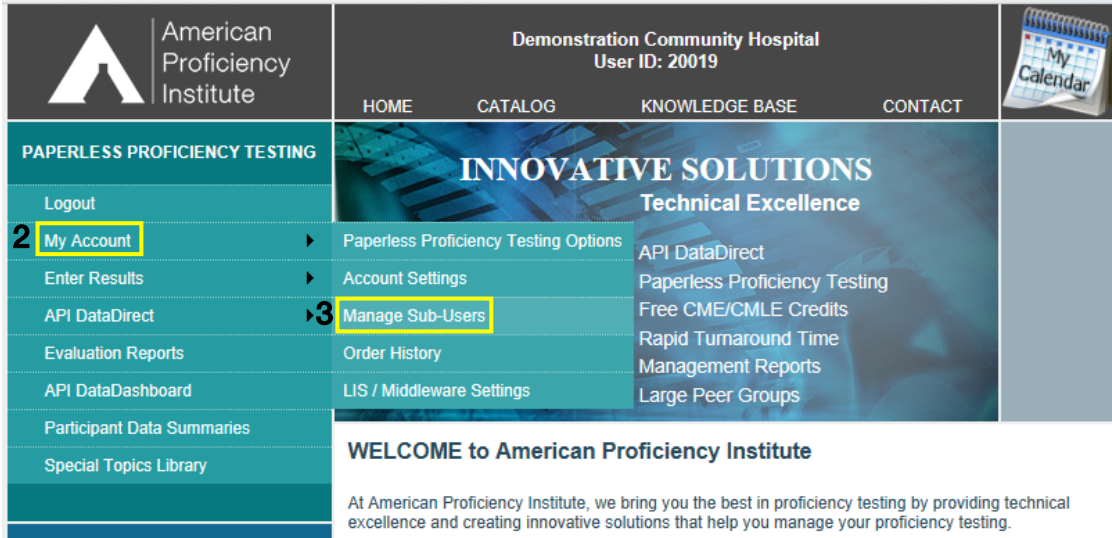
#### Creating a Sub-User with Supervisory Rights:

- 1) Log in to Paperless Proficiency Testing.
  - a. See login tips on page 133.



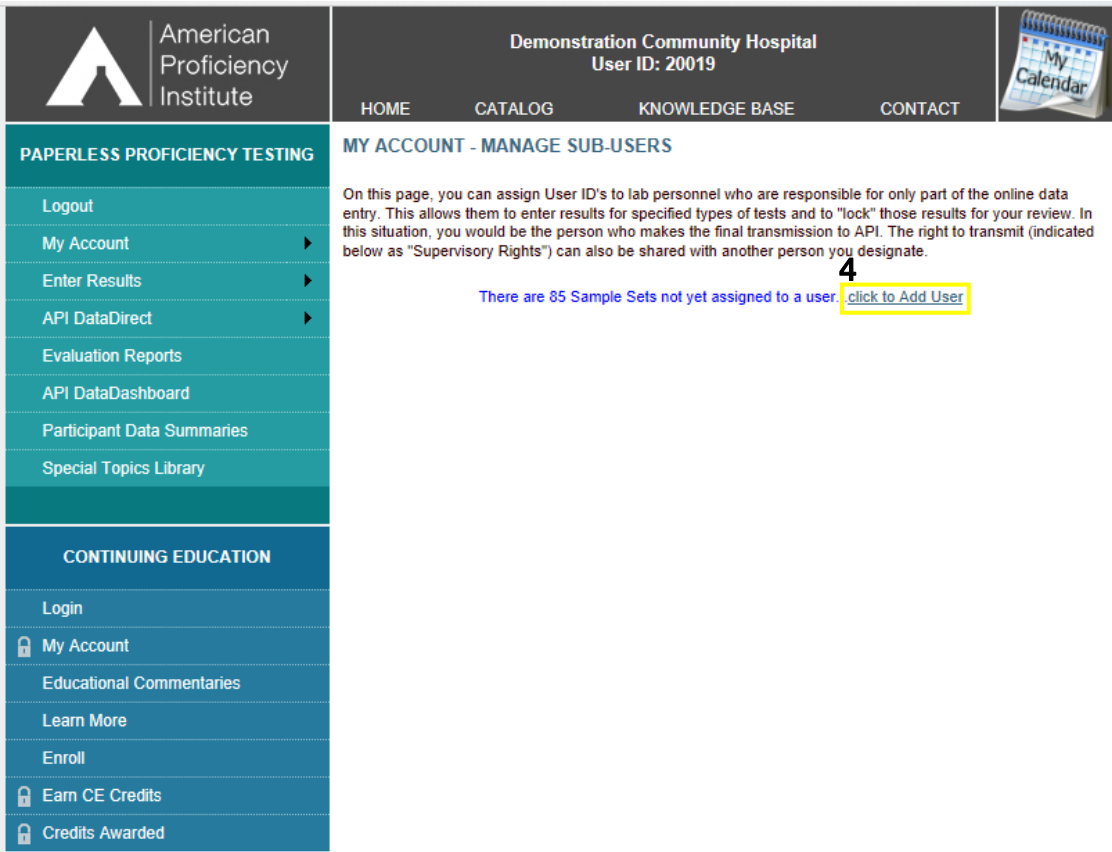
The screenshot shows the American Proficiency Institute website. The top navigation bar includes links for HOME, CATALOG, KNOWLEDGE BASE, and CONTACT. The main content area is divided into two sections: PAPERLESS PROFICIENCY TESTING and CONTINUING EDUCATION. Under PAPERLESS PROFICIENCY TESTING, the 'Login' button is highlighted with a yellow box. Below the navigation, the 'LOGIN' section contains the text 'Log in below to Paperless Proficiency Testing.' and a note: 'Note: User ID and Password are case sensitive.' A login form is displayed with 'User ID: 20019' and 'Password: [masked]' fields, both highlighted with yellow boxes. Below the form is a 'Log in to Paperless Proficiency Testing' button and a link for 'Lost your password?'. At the bottom, a note states: 'The User ID and Password are different for Paperless Proficiency Testing and Continuing Education. To login to your Continuing Education account, select the Login button under the CONTINUING EDUCATION section on the left.'

- 2) Once you are logged in, move the cursor to “My Account” in the teal section, located on the left-hand side of the screen.
- 3) Click on “Manage Sub-Users.”



The screenshot shows the user interface for Demonstration Community Hospital (User ID: 20019). The left sidebar contains a teal menu with the following items: Logout, My Account (highlighted with a yellow box and a '2'), Enter Results, API DataDirect, Evaluation Reports, API DataDashboard, Participant Data Summaries, and Special Topics Library. The 'My Account' dropdown menu is open, showing options: Paperless Proficiency Testing Options, Account Settings (highlighted with a yellow box and a '3'), Manage Sub-Users (highlighted with a yellow box), Order History, and LIS / Middleware Settings. The main content area features a banner for 'INNOVATIVE SOLUTIONS' with the tagline 'Technical Excellence' and a list of services: API DataDirect, Paperless Proficiency Testing, Free CME/CMLE Credits, Rapid Turnaround Time, Management Reports, and Large Peer Groups. Below the banner is a 'WELCOME to American Proficiency Institute' message and a paragraph of text.

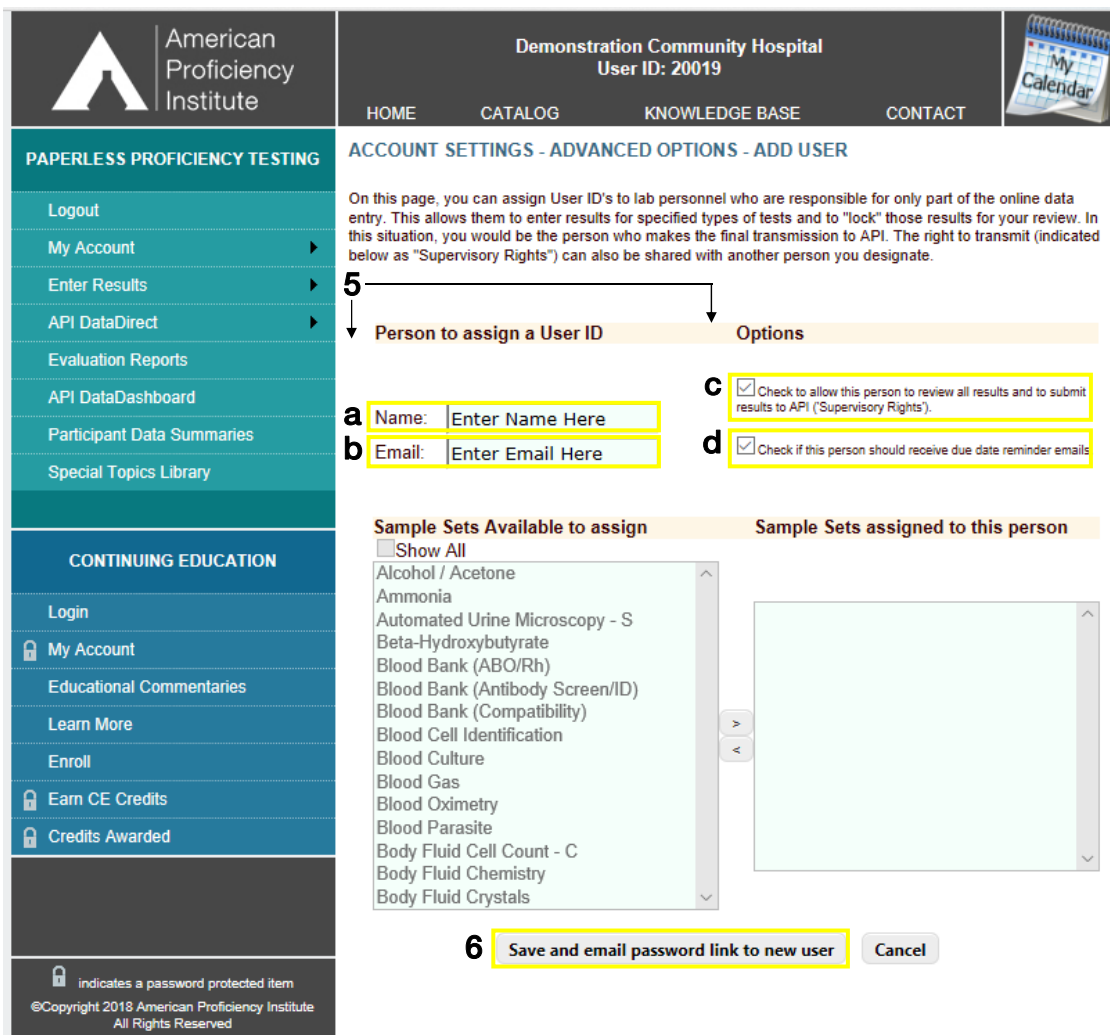
- 4) On the “My Account – Manage Sub-Users” page, click on “click to Add User.”



The screenshot shows the 'MY ACCOUNT - MANAGE SUB-USERS' page. The left sidebar is teal and contains two sections: 'PAPERLESS PROFICIENCY TESTING' (Logout, My Account, Enter Results, API DataDirect, Evaluation Reports, API DataDashboard, Participant Data Summaries, Special Topics Library) and 'CONTINUING EDUCATION' (Login, My Account, Educational Commentaries, Learn More, Enroll, Earn CE Credits, Credits Awarded). The main content area has a heading 'MY ACCOUNT - MANAGE SUB-USERS' and a paragraph of text explaining the page's function. Below the text, there is a blue link: 'There are 85 Sample Sets not yet assigned to a user. [click to Add User](#)' (the link is highlighted with a yellow box and a '4').

- 5) On the “Account Settings – Advanced Options – Add User” page:

- a. Enter the name of the new Sub-User in the “Name” field.
  - b. Enter the Sub-User’s email address in the “Email field.
  - c. Under “Options,” check the box next to “Check to allow this person to review all results and to submit results to API (“Supervisory Rights”).”
    - i. Please note: The list of tests in the “Sample Sets Available to Assign” section will become disabled and analytes cannot be selected because a Sub-User with Supervisory Rights has access to all tests.
  - d. Under “Options,” check the box next to “Check if this person should receive due date reminder emails,” if desired.
- 6) When all information is complete, click “Save and email password link to new user.”



**ACCOUNT SETTINGS - ADVANCED OPTIONS - ADD USER**

On this page, you can assign User ID's to lab personnel who are responsible for only part of the online data entry. This allows them to enter results for specified types of tests and to "lock" those results for your review. In this situation, you would be the person who makes the final transmission to API. The right to transmit (indicated below as "Supervisory Rights") can also be shared with another person you designate.

**5** ↓

**a** Name:

**b** Email:

**c**  Check to allow this person to review all results and to submit results to API ("Supervisory Rights").

**d**  Check if this person should receive due date reminder emails

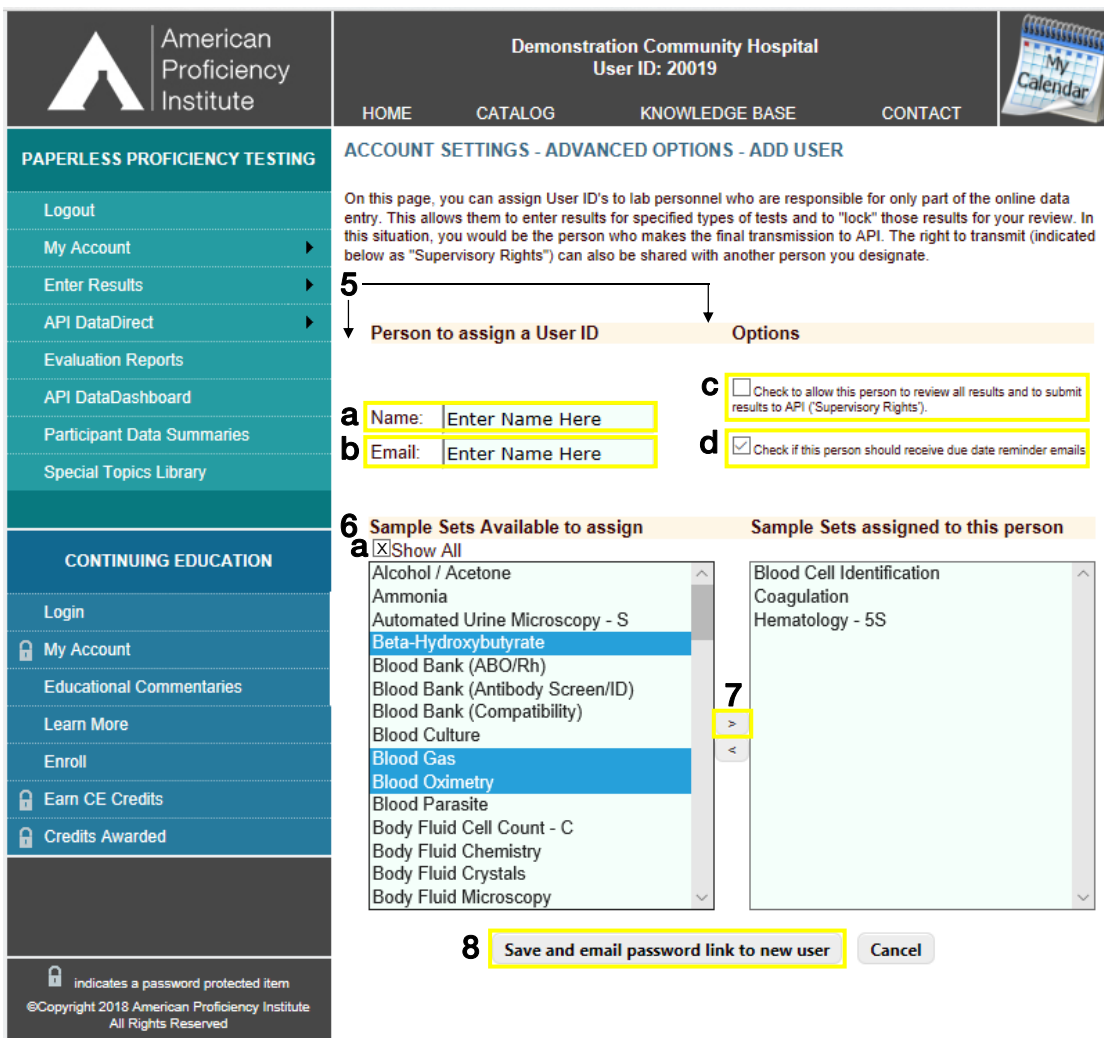
**6**

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- 7) The new sub-user will receive an email with his/her newly created User ID and a link to set up a password. They will be able to log in to the API website immediately after the account has been created and the password has been set up.

Creating a Non-Supervisory Sub-User:

- Follow Steps 1-4 from “Creating a Supervisory Sub-User.”
- 5) On the “Account Settings – Advanced Options – Add User” page:
- Enter the name of the new Sub-User in the “Name” field.
  - Enter the Sub-User’s email address in the “Email field.
  - Do not** check the box under “Options” next to “Check to allow this person to review all results and to submit results to API (‘Supervisory Rights’).
  - Under “Options,” check the box next to “Check if this person should receive due date reminder emails,” if desired.



**American Proficiency Institute**  
**Demonstration Community Hospital**  
 User ID: 20019

HOME CATALOG KNOWLEDGE BASE CONTACT

**PAPERLESS PROFICIENCY TESTING**  
 ACCOUNT SETTINGS - ADVANCED OPTIONS - ADD USER

Logout  
 My Account  
 Enter Results  
 API DataDirect  
 Evaluation Reports  
 API DataDashboard  
 Participant Data Summaries  
 Special Topics Library

**CONTINUING EDUCATION**  
 Login  
 My Account  
 Educational Commentaries  
 Learn More  
 Enroll  
 Earn CE Credits  
 Credits Awarded

On this page, you can assign User ID's to lab personnel who are responsible for only part of the online data entry. This allows them to enter results for specified types of tests and to "lock" those results for your review. In this situation, you would be the person who makes the final transmission to API. The right to transmit (indicated below as "Supervisory Rights") can also be shared with another person you designate.

**5** Person to assign a User ID Options

**a** Name:   
**b** Email:

**c**  Check to allow this person to review all results and to submit results to API ('Supervisory Rights').  
**d**  Check if this person should receive due date reminder emails

**6** Sample Sets Available to assign Sample Sets assigned to this person

**a**  Show All

Alcohol / Acetone	Blood Cell Identification
Ammonia	Coagulation
Automated Urine Microscopy - S	Hematology - 5S
Beta-Hydroxybutyrate	
Blood Bank (ABO/Rh)	
Blood Bank (Antibody Screen/ID)	
Blood Bank (Compatibility)	
Blood Culture	
Blood Gas	
Blood Oximetry	
Blood Parasite	
Body Fluid Cell Count - C	
Body Fluid Chemistry	
Body Fluid Crystals	
Body Fluid Microscopy	

**7** > <

**8**

indicates a password protected item  
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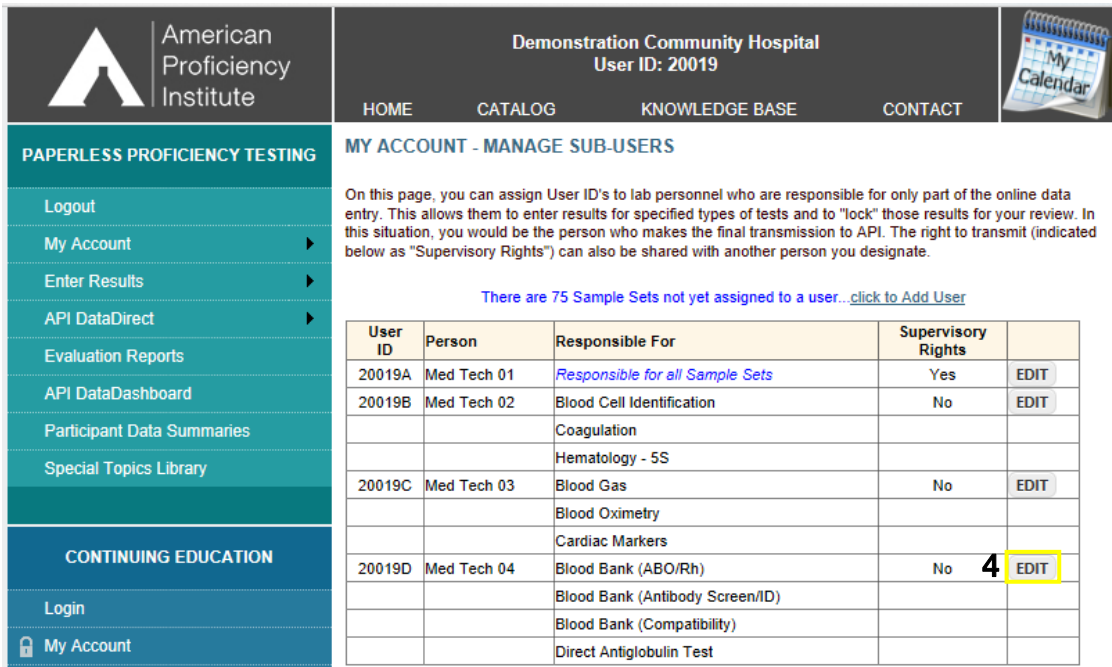
- 6) Under “Sample Sets Available to Assign,” select the tests that should be assigned to this sub-user. To select more than one sample set at a time, hold the CTRL button down while clicking on the name of the test.
  - a. Please note: You may assign the same sample set to multiple users. To do this, check the box next to “Show All” under “Sample Sets Available to Assign.” Once that has been done, you will see the entire list of sample sets ordered for your facility and you may assign them as you usually would.
- 7) Once the tests are selected, click the arrow button that points toward the “Sample Sets Assigned to This Person” section on the right-hand side. The selected tests should move to the “Sample Sets Assigned to This Person” section.
- 8) When the selected tests show in the “Sample Sets Assigned to This Person” section and all other information is complete, click “Save and email password link to new user.”
- 9) The new sub-user will receive an email with his/her newly created User ID and a link to create his/her password. They will be able to log in to the API website immediately after the account has been created.
- 10) Once a Non-Supervisory Sub-User enters results and saves them, only the primary accountholder or a Sub-User with Supervisory Rights can “unlock” the results for editing by double-clicking on the padlock next to the locked sample set.

#### Editing a Sub-User:

- *Only the primary user on an account may edit a sub-user account. A supervisory sub-user can create another sub-user account but cannot edit or delete any type of sub-user account.*
  - *Follow Steps 1-3 from “Creating a Supervisory Sub-User.”*
- 4) Locate the Sub-User account that you wish to edit and the click “Edit” button, located at the right end of the row.
  - 5) On the “Account Settings – Advanced Options – Edit User” page, all of the current information for the selected sub-user will appear.
  - 6) Make the necessary changes.
  - 7) Click “Save” at the bottom of the page.
    - a. Please note: If you are changing the email address for an existing Sub-User, an email with the User ID and a link to reset the password will not be sent. If you need to have the password reset, click the “Login” button underneath “Paperless Proficiency Testing,” then click “Lost your password?” Enter the User ID and the new email address and click “Send Reset Instructions.”

Deleting a Sub-User:

- Repeat Steps 1-3 from “Creating a Supervisory Sub-User.”
- 4) Locate the Sub-User account that you wish to delete and click the “Edit” button, located on the right side of the row.



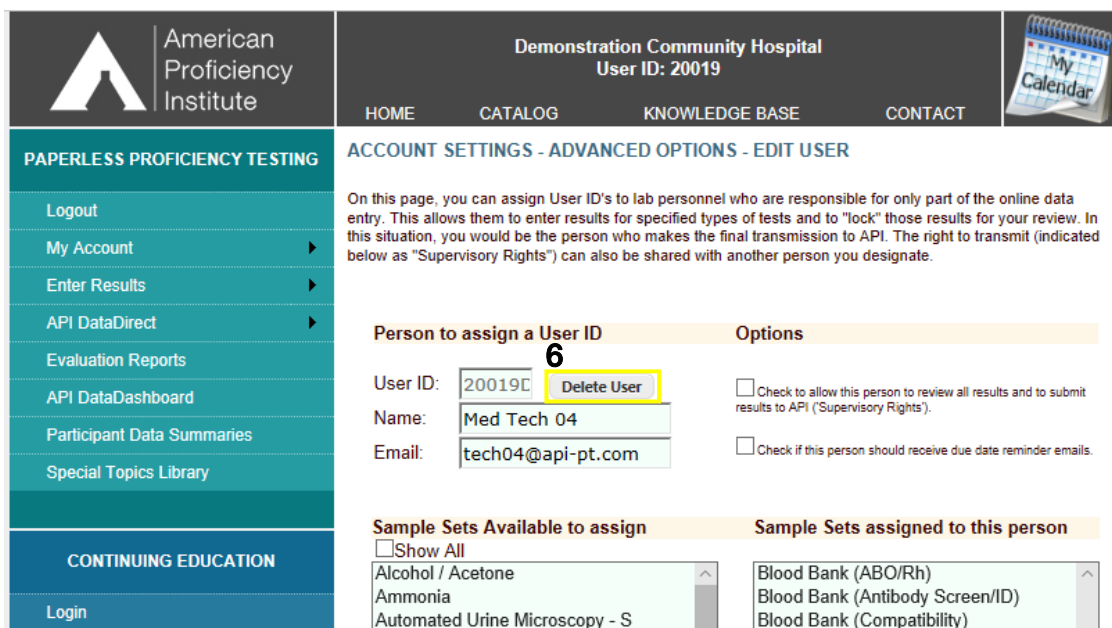
**MY ACCOUNT - MANAGE SUB-USERS**

On this page, you can assign User ID's to lab personnel who are responsible for only part of the online data entry. This allows them to enter results for specified types of tests and to "lock" those results for your review. In this situation, you would be the person who makes the final transmission to API. The right to transmit (indicated below as "Supervisory Rights") can also be shared with another person you designate.

There are 75 Sample Sets not yet assigned to a user... [click to Add User](#)

User ID	Person	Responsible For	Supervisory Rights	
20019A	Med Tech 01	<a href="#">Responsible for all Sample Sets</a>	Yes	EDIT
20019B	Med Tech 02	Blood Cell Identification	No	EDIT
		Coagulation		
		Hematology - 5S		
20019C	Med Tech 03	Blood Gas	No	EDIT
		Blood Oximetry		
		Cardiac Markers		
20019D	Med Tech 04	Blood Bank (ABO/Rh)	No	<b>4</b> EDIT
		Blood Bank (Antibody Screen/ID)		
		Blood Bank (Compatibility)		
		Direct Antiglobulin Test		

- 5) On the “Account Settings – Advanced Options – Edit User” page, all of the current information for the selected sub-user will appear.
- 6) Click the “Delete User” button, located to the right of the displayed User ID.



**ACCOUNT SETTINGS - ADVANCED OPTIONS - EDIT USER**

On this page, you can assign User ID's to lab personnel who are responsible for only part of the online data entry. This allows them to enter results for specified types of tests and to "lock" those results for your review. In this situation, you would be the person who makes the final transmission to API. The right to transmit (indicated below as "Supervisory Rights") can also be shared with another person you designate.

**Person to assign a User ID**

User ID:  **6** [Delete User](#)

Name:

Email:

**Options**

Check to allow this person to review all results and to submit results to API ("Supervisory Rights").

Check if this person should receive due date reminder emails.

**Sample Sets Available to assign**

Show All

Alcohol / Acetone

Ammonia

Automated Urine Microscopy - S

**Sample Sets assigned to this person**

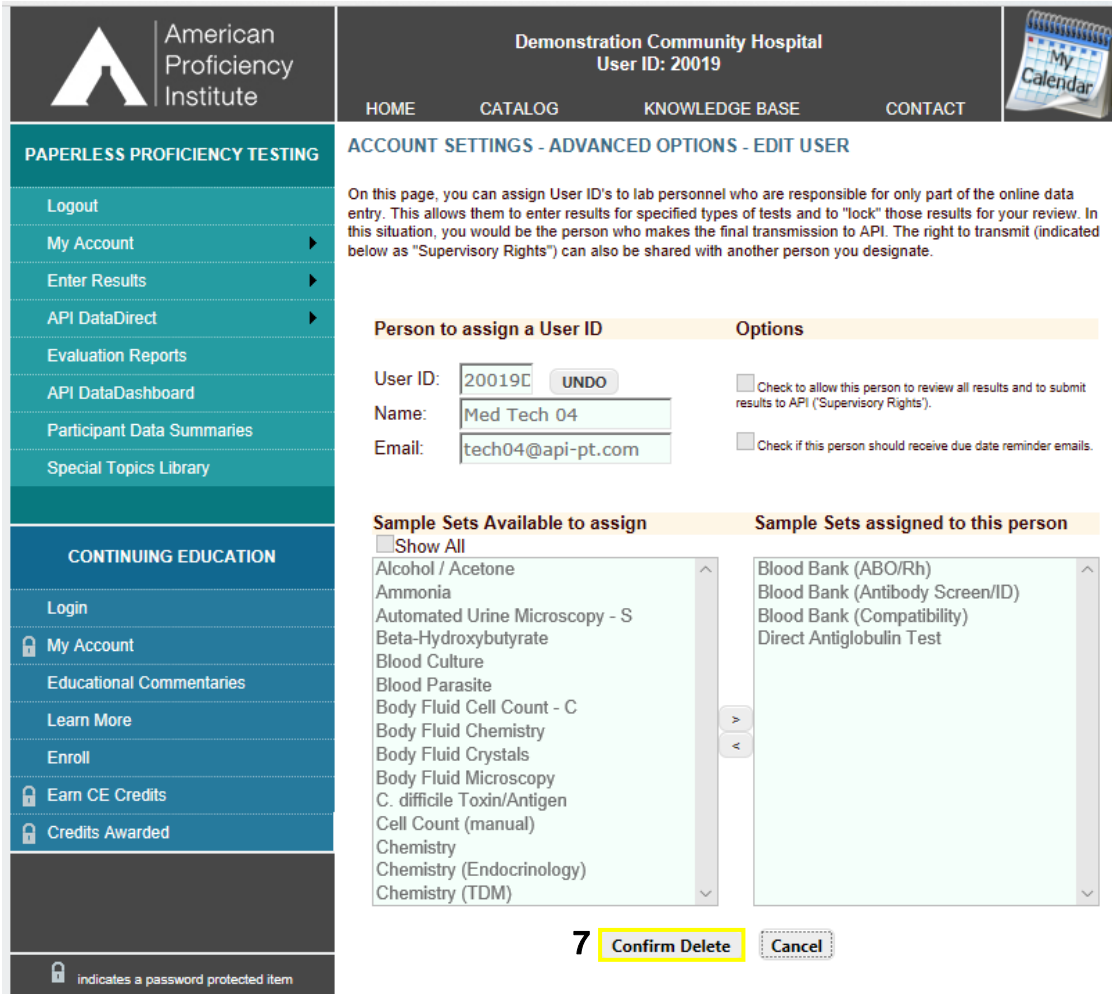
Blood Bank (ABO/Rh)

Blood Bank (Antibody Screen/ID)

Blood Bank (Compatibility)



7) Click “Confirm Delete” at the bottom of the page.



**ACCOUNT SETTINGS - ADVANCED OPTIONS - EDIT USER**

On this page, you can assign User ID's to lab personnel who are responsible for only part of the online data entry. This allows them to enter results for specified types of tests and to "lock" those results for your review. In this situation, you would be the person who makes the final transmission to API. The right to transmit (indicated below as "Supervisory Rights") can also be shared with another person you designate.

**Person to assign a User ID**      **Options**

User ID:         Check to allow this person to review all results and to submit results to API ("Supervisory Rights").

Name:        Check if this person should receive due date reminder emails.

Email:

**Sample Sets Available to assign**      **Sample Sets assigned to this person**

Show All

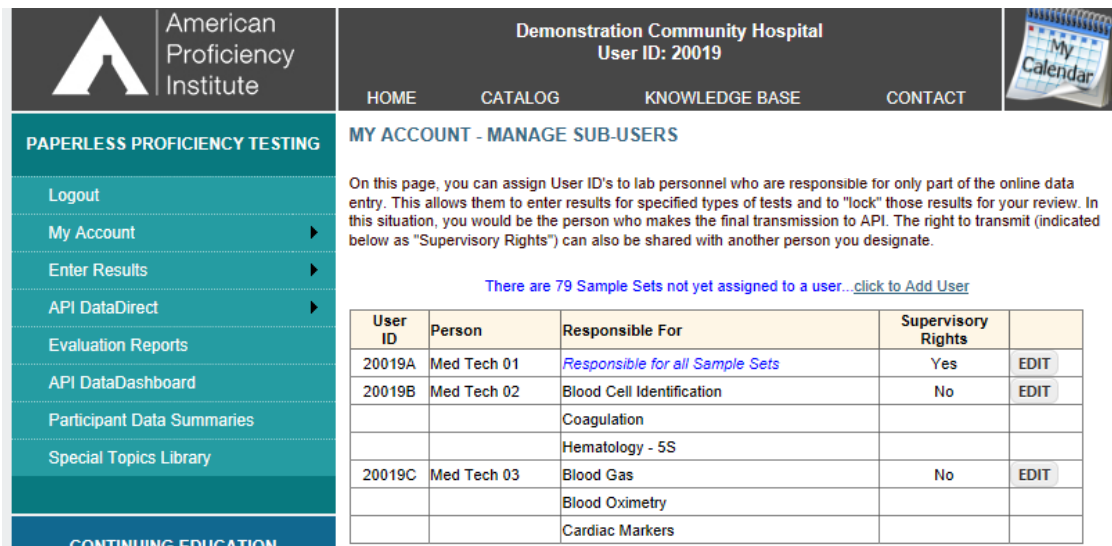
Alcohol / Acetone  
Ammonia  
Automated Urine Microscopy - S  
Beta-Hydroxybutyrate  
Blood Culture  
Blood Parasite  
Body Fluid Cell Count - C  
Body Fluid Chemistry  
Body Fluid Crystals  
Body Fluid Microscopy  
C. difficile Toxin/Antigen  
Cell Count (manual)  
Chemistry  
Chemistry (Endocrinology)  
Chemistry (TDM)

Blood Bank (ABO/Rh)  
Blood Bank (Antibody Screen/ID)  
Blood Bank (Compatibility)  
Direct Antiglobulin Test

**7**

🔒 indicates a password protected item

8) On the “My Account – Manage Sub-Users” page, you should see that the sub-user is no longer listed.



**MY ACCOUNT - MANAGE SUB-USERS**

On this page, you can assign User ID's to lab personnel who are responsible for only part of the online data entry. This allows them to enter results for specified types of tests and to "lock" those results for your review. In this situation, you would be the person who makes the final transmission to API. The right to transmit (indicated below as "Supervisory Rights") can also be shared with another person you designate.

[There are 79 Sample Sets not yet assigned to a user...click to Add User](#)

User ID	Person	Responsible For	Supervisory Rights	
20019A	Med Tech 01	<a href="#">Responsible for all Sample Sets</a>	Yes	EDIT
20019B	Med Tech 02	Blood Cell Identification	No	EDIT
		Coagulation		
		Hematology - SS		
20019C	Med Tech 03	Blood Gas	No	EDIT
		Blood Oximetry		
		Cardiac Markers		

**CONTINUING EDUCATION**