



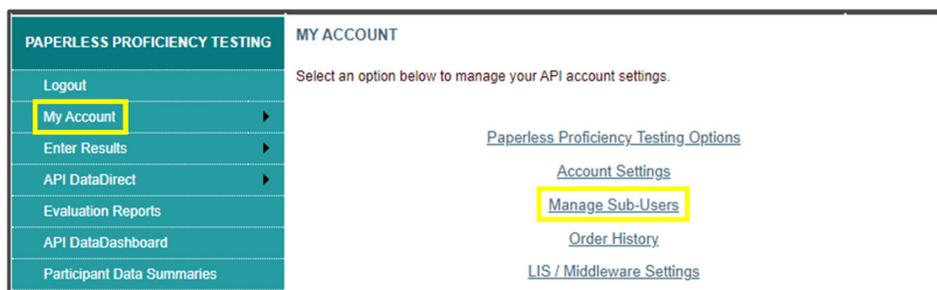
There can only be one primary account holder (contact email address) for each Paperless Proficiency Testing account. The primary account holder can create sub-user accounts with special permissions for additional lab personnel. Below are the two types of sub-user accounts available, along with a list of features/permissions for each one:

- **Sub-Users with Supervisory Rights:**
  - They can enter and review results for all ordered sample sets.
  - They can submit results (once all results have been entered).
  - They receive the same email notifications as the primary account holder (excluding tracking number emails).
  - They can create other sub-user accounts (both with and without Supervisory Rights).
  - They can assign testing (sample sets) to Sub-Users **without** Supervisory Rights.
  - They **can edit and delete** Sub-Users **without** Supervisory Rights.
  - They can edit their own sub-user account. They **cannot edit or delete** any other Sub-Users **with** Supervisory Rights.
  - They can create **Continuing Education** accounts for themselves and other staff members.
  - They **cannot** access the online renewal system.
  - **Optional:** They can receive due date reminders (if that option is selected in their account profile).
- **Sub-Users without Supervisory Rights:**
  - They can enter, save, and lock results for **assigned sample sets only**.
    - Locked results can only be unlocked by a Sub-User with Supervisory Rights or the primary account holder.
  - **They cannot submit results.**
  - They receive limited email notifications about the account.
  - They **cannot create, edit, or delete** any sub-user accounts, **including their own**.
  - They can create Continuing Education accounts for themselves and other staff members.
  - **Optional:** They can receive due date reminders (if that option is selected in their account profile).

### **How to Create a Sub-User with Supervisory Rights:**

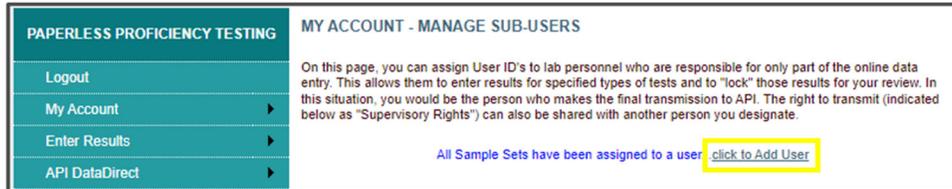
*\*\* Some screenshots may not show the changes from the recent website update. The instructions are still accurate.\*\**

1. Log in to **Paperless Proficiency Testing**.
2. Click **My Account**.
3. Click **Manage Sub-Users**.

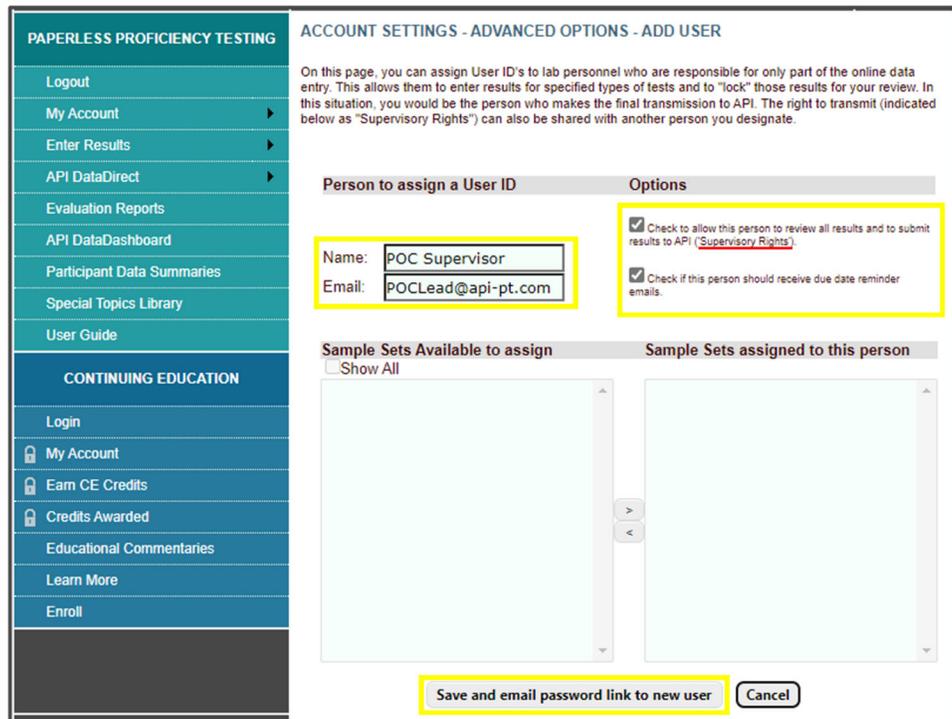




- On the **My Account – Manage Sub-Users** page, click on **Click to Add User**.



- Enter the new sub-user's name in the **Name** field.
- Enter the new sub-user's email address in the **Email Address** field.
- Under **Options**, check the box for **Check to allow this person to review all results and to submit results to API ("Supervisory Rights")**.
  - When you check this box, you will see that the list of tests in the **Sample Sets Available to Assign** column are grayed out and can no longer be selected. This is because a Sub-User with Supervisory Rights has access to enter, review, and submit results for all ordered tests.
- Under **Options**, the box next to **Check if this person should receive due date reminder emails** will already be checked by default.
  - If you *do not* want this sub-user to receive due date reminders, you will need to uncheck the box.

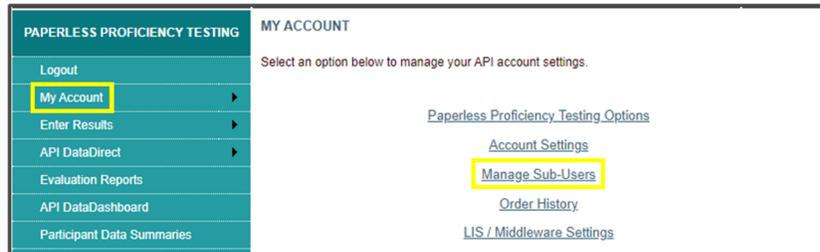


- When finished, click **Save and Email Password Link to New User**.
- The new sub-user will receive an email with their User ID and a link to set up their password. They will be able to log in immediately after they set up their password.

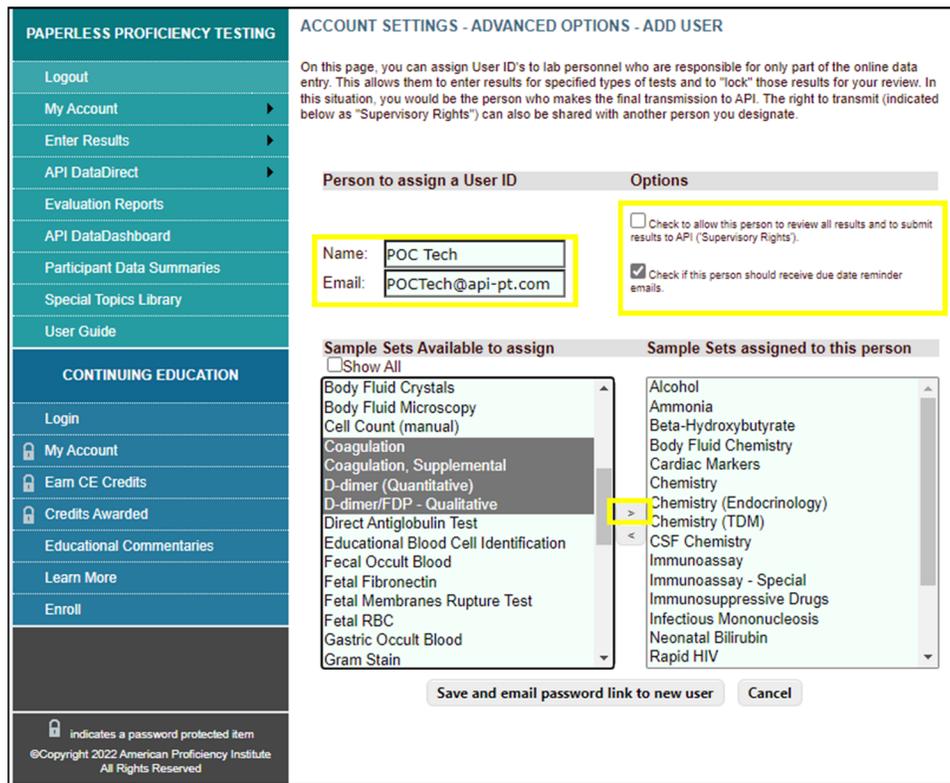


## How to Create a Sub-User *without* Supervisory Rights:

1. Log in to Paperless Proficiency Testing.
2. Click My Account.
3. Click Manage Sub-Users.



4. On the **My Account - Manage Sub-Users** page, click on the link: **click to Add User**.
5. Enter the new sub-user's name in the **Name** field.
6. Enter the new sub-user's email address in the **Email Address** field.
7. Under **Options**, **do not** check the box for **Check to allow this person to review all results and to submit results to API ("Supervisory Rights")**.
8. Under **Options**, the box next to **Check if this person should receive due date reminder emails** will already be checked by default.
  - a. If you *do not* want this sub-user to receive due date reminders, you will need to uncheck the box.

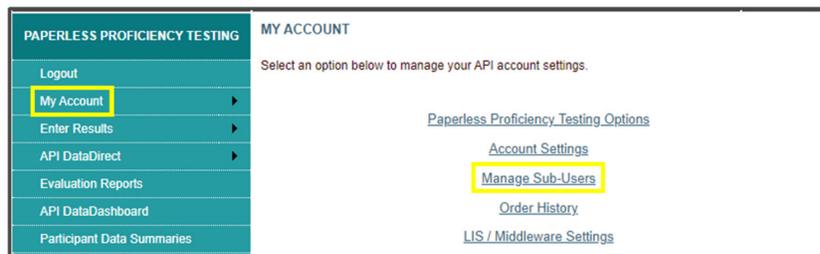




9. Under **Sample Sets Available to Assign**, select the tests that you wish to assign to this sub-user.
  - a. Click the name of a **Sample Set** to highlight it.
  - b. Hold the **CTRL button** down on your keyboard to select more than one sample set at a time.
  - c. **You may assign the same sample set to multiple users.** To do this, check the box for **Show All** under **Sample Sets Available to Assign**. You will now see the entire list of sample sets ordered for your facility, even if some of them have been assigned to other sub-users.
10. Once you have selected the tests you want to assign, click on the arrow button pointing toward the **Sample Sets Assigned to This Person** column.
11. When finished, click **Save and Email Password Link to New User**.
12. The new sub-user will receive an email with their User ID and a link to set up their password. They will be able to log in immediately after they set up their password.

### How to Edit an Existing Sub-User Account:

- The primary account holder can edit all sub-user accounts (both with and without Supervisory Rights).
  - A Sub-User with Supervisory Rights can edit an account for **only** a Sub-User *without* Supervisory Rights.
1. Log in to **Paperless Proficiency Testing**.
  2. Click **My Account**.
  3. Click **Manage Sub-Users**.



4. Locate the sub-user account that you need to edit.
5. Click **Edit**, on the right-hand side of the corresponding row.

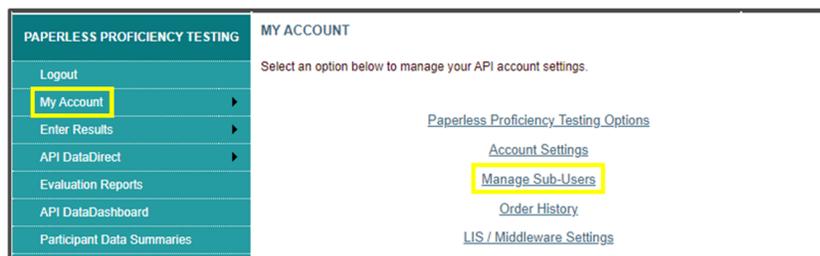
PAPERLESS PROFICIENCY TESTING		MY ACCOUNT - MANAGE SUB-USERS			
Logout		On this page, you can assign User ID's to lab personnel who are responsible for only part of the online data entry. This allows them to enter results for specified types of tests and to "lock" those results for your review. In this 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.			
My Account		All Sample Sets have been assigned to a user. <a href="#">click to Add User</a>			
Enter Results					
API DataDirect					
Evaluation Reports					
API DataDashboard					
Participant Data Summaries					
Special Topics Library					
User Guide					
User ID	Person	Responsible For	Supervisory Rights	EDIT	
70067A	POC Supervisor	Responsible for all Sample Sets	Yes	EDIT	
70067B	POC Tech	Activated Clotting Time - Medtronic HemoTec	No	EDIT	
		Amniotic Fluid pH			
		i-STAT			
		i-STAT ACT			
		POC Glucose A			



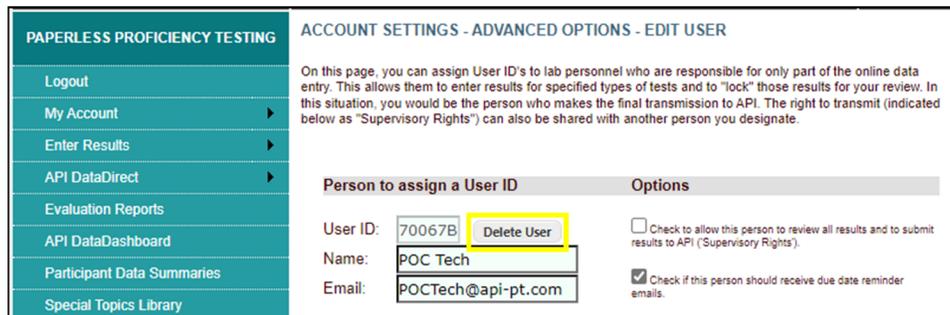
6. On the **Account Settings – Advanced Options – Edit User** page, you will see all of the current information for the selected sub-user.
7. Make the necessary changes.
  - a. You may update the sub-user’s name, email address, permissions, and/or assigned sample sets.
  - b. If you change the sub-user’s email address, they will not receive an email to reset their password. If they need to reset their password, they will need to go to the **Paperless Proficiency Testing Login** screen and click the **Lost Your Password?** link. From there, they can enter their User ID and updated email address to request an email with a link to reset their password.
8. Click **Save**.

### How to Delete an Existing Sub-User Account:

- The primary accountholder can delete all sub-user accounts (both with and without Supervisory Rights).
  - A Sub-User with Supervisory Rights can delete an account for **only** a Sub-User *without* Supervisory Rights.
1. Log in to **Paperless Proficiency Testing**.
  2. Click **My Account**.
  3. Click **Manage Sub-Users**.



4. Locate the sub-user account that you need to delete.
5. Click **Edit**, on the right-hand side of the corresponding row.
6. On the **Account Settings – Advanced Options – Edit User** page, you will see all of the current information for the selected sub-user.
7. Click **Delete User**.





8. Click **Confirm Delete**.
9. On the **My Account – Manage Sub-Users** page, you will see that the deleted sub-user is no longer included in the table.

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

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

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

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: 70067B UNDO  
Name: POC Tech  
Email: POCtech@api-pt.com

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** **Sample Sets assigned to this person**

Show All

Alcohol  
Ammonia  
Beta-Hydroxybutyrate  
Body Fluid Chemistry  
Cardiac Markers  
Chemistry  
Chemistry (Endocrinology)  
Chemistry (TDM)  
CSF Chemistry  
Immunoassay  
Immunoassay - Special  
Immunosuppressive Drugs  
Infectious Mononucleosis  
Neonatal Bilirubin  
Rapid HIV

**Confirm Delete** **Cancel**