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# Introduction

The AAMC Access Code Management Tool (ACMT) was created to streamline the distribution of access codes that permit individuals to use an AAMC service or product. This guide is written for code bank managers, the assigned individuals who can manage one or more banks of access codes.

Access codes are distributed by email to individuals you enter into the ACMT system. Upon receiving the email, the recipient will simply need to click a redemption link. They then can sign in with their existing AAMC username and password or they can create an AAMC account.

Most code banks are created by purchasing a code bank product in the AAMC Store. The purchaser of the code bank is automatically assigned the role of code bank manager. Some code banks are created by AAMC staff, who assign the code bank manager roles.

As a code bank manager, you can distribute codes, resend codes, revoke codes, and monitor who has redeemed their codes. You can personalize the emails that go out to your recipients and you can elect to be notified when a code is redeemed.

We hope you find ACMT to be easy to use and helpful. Should you require support, the Help menu in ACMT contains contact information.

# **Accessing ACMT**

To perform any of the tasks in this user guide, you will need access to ACMT. Permissions for accessing ACMT are granted to you as part of the code bank purchase process in the AAMC Store or when an AAMC staff member grants you access.

- Once your code bank purchase has been processed, follow the instructions provided in the order confirmation email and on the FAQ page in the AAMC Store or simply open your internet browser to <a href="https://auth.aamc.org/acmt">https://auth.aamc.org/acmt</a>
- 2. Sign in using your AAMC username and password.
- 3. If your login was successful, you will see your name in the top right corner of the screen.

If you forget your username or password, please use the "Forgot your username?" or "Forgot your password?" options on the sign-in page or select "Need Help?".

# My Code Banks

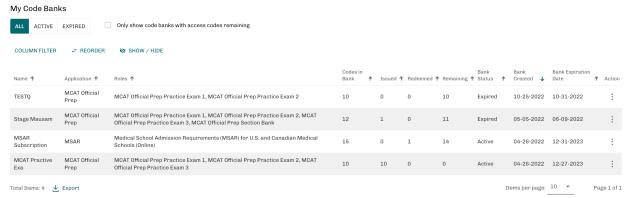
The My Code Banks page is your home screen. You can return to it at any time by selecting "My Code Banks" in the top menu.



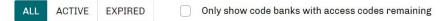
The My Code Banks section contains a list of all code banks for which you are a code bank manager. You can see various details about the code banks, including the name, bank status, number of remaining codes, bank expiration date, etc.



Your list of code banks may include just one bank or hundreds of banks. See the Managing ACMT Tables section of this user guide for more information.



Choose "All" to show all your code banks or you can view just your active or expired banks. Select "Only show code banks with access codes remaining" to hide banks that have no more codes available to distribute.



Click on the : in the 'Actions column and choose "Manage" option to proceed with issuing access codes or taking other actions for a specific bank.

# Managing ACMT Tables (Filtering, Sorting, and More)

The ACMT tables give you many options to configure what contents the table contains. You can:

• **Sort** columns in ascending Name ↑ or descending order Name ↓ by clicking a column heading.

Use the options at the top of the table to: COLUMN FILTER → REORDER SHOW / HIDE

- COLUMN FILTER option to filter columns for a name, application, roles and other fields
- REORDER option to arrange columns so that the columns you rely upon most can be easily viewed.
- **SHOW/HIDE** option to view or hide columns so that your default view includes only the most important columns that you would like to view.
- Adjust how many records you see using the drop-down menu below the table.

Items per page: 10 ▼

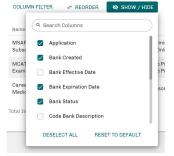
To download a file of all the rows in a table, select "Export All Data" below the table.



# **Edit the Name and Description of a Code Bank**

You can change the default code bank name and, optionally, add a code bank description. The code bank description option is not shown by default in the My Code Bank table. You can add it by

selecting SHOW / HIDE and checking "Description."





- From My Code Banks, select "Manage" from the Actions column of the table. This will launch a page that will allow you to manage a selected Code Bank.
- Click the PRENAME BANK button located on the top right, make your desired edits, and click "Save Changes." This optional step may make it easier for you to distinguish between code banks if you manage many of them.

Code Bank Name *	
MSAR Subscription	
Code Bank Description *	
MSAR Subscription	
	//
	183 characters left of 2
	Cancel SAVE CHANGES

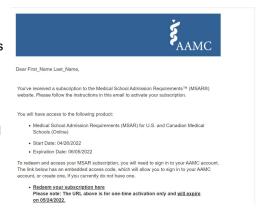
# Edit the Email Message That Will Go Out to Your Recipients

You will distribute access codes by email. Your recipients will receive an email from <a href="mailto:aamc.org">aamc.org</a>. The first name and last name you enter when issuing a code will be used in the salutation. Most of the content of the email is not editable by the code bank manager, but you can edit the opening paragraph(s) as well as the subject line. You can also add an optional BCC email address to blind copy yourself or someone else when each email is sent.

Here is how to edit the email message:

- From the My Code Banks page, select "Manage" under the Actions column.
- In the upper right corner, select

  ✓ MANAGE EMAIL
- This will open a preview window, showing you what your emails will look like if no further changes are made. If you are satisfied, select "Return to Bank." If you wish to make edits, select "Edit Email" to display the elements of the email you can edit.
- After you are done editing the body, subject line, and BCC email address, select "Save Changes." You can then review your changes, make more edits, or select "Return to Bank."





# **Issuing Access Codes**

The **Access Codes** box on the left side of the Code Bank Details page provides valuable information about how many codes you have remaining in your bank and the expiration period for codes issued from your bank. Most codes are valid for 28 days from the date they are issued.

To issue access codes, you will need the **first name**, **last name**, and **email address** for every recipient. You can issue an individual code, or you can use the bulk issue option to distribute codes to many recipients at once. Before you begin, verify that the email message and subject line suit your needs.

### Access Codes

Total: 15 Issued: 0 Redeemed: 0 Remaining: 15



Issued Codes are valid for 28 days from the date of issue.

ISSUE ACCESS CODES



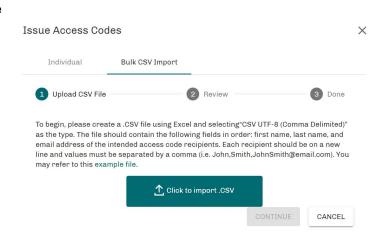
To begin, select the "Issue Access Codes" button. Issuing an Individual Code

- Enter the name and email address of the recipient. (A copy will be sent to any address you have specified in the "BCC Address" field when you edited the email template.)
- You have the option to be notified when a recipient has activated their code.
- Select "Issue Access Code."
- You will see a message letting you know that the code has been issued. Repeat as needed if you wish to issue additional codes. When you are finished, select "OK."
- Once codes have been issued, you will see a table appear listing all your distributed codes and their status. See Managing ACMT Tables for information about filtering and sorting the data in ACMT tables.

# Individual Bulk CSV Import First Name \* First Name \* Last Name \* Last Name Email Address \* Email Address BCC Address: An optional BCC recipient may be added by clicking the "Manage Email" button. Notify me when the user registers ISSUE ACCESS CODE CANCEL

### Issuing Bulk Codes

- To issue access codes in bulk, you will need to create a very simple file and save it as a comma separated value (.CSV) format. An example is provided for you after you choose the "Bulk CSV Import" tab.
- You can create a .CSV file using Excel and selecting "CSV UTF-8 (Comma Delimited)" as the type.
- The formatting of the file should be just three columns, containing the first name, last name, and email address. See the Example file within ACMT for additional information.
- o You can upload up to 2000 recipients at a time.
- Once your file is ready, select the "Click to Import CSV" button and select the file you already saved.
- Select "Continue" and review your imported list.
- If there are any rows in your .CSV file that cannot be included, you will receive an on-screen message. If this happens, select "Cancel," correct the errors, and start over.
- Once your import is complete, select "Issue Access Codes" and you are finished.



# **Monitoring Access Code Use**

With ACMT, you can monitor who has redeemed their access codes. The possible statuses for a code are:

**Issued**: A code has been emailed to the recipient, but they have taken no action.

**Resent**: This is functionally the same as Issued, but at some point, the code bank manager had to resend the access code email to the recipient.



**Redeemed**: The recipient has redeemed the access code and has permissions to use the product/service until the role expires. Expiration dates vary by product and service; you can see the expiration period in the Access box on the Code Bank Details page.

**Expired**: Once issued, an access code is typically only active for 28 calendar days. The recipient needs to redeem the code during that time. If they do not, the access code status will be changed to Expired. See section on expired access codes for additional details.

**Revoked**: A code bank manager can revoke any access code that is in Issued or Resent status. Upon completion of that action the status will be changed to Revoked.

# **Expired Access Codes**

Once issued, an access code is typically active for 28 calendar days. The recipient needs to redeem the code during that time. If they do not, the access code will expire.

When an access code expires, it is added back into your pool of remaining access codes. You can then issue it to someone else if the code bank status is still active. You can see which codes expired from within the Code Bank Details view.

If you need to re-issue a code to the same recipient, follow the process for issuing an access code to an individual. You cannot resend an expired access code.

# Resending, Revoking, or Re-issuing Codes

Access code emails can be lost by recipients, caught by spam filters, or inadvertently sent to an incorrect or inactive email address. With ACMT, you can resend or revoke an access code when it is in the Issued or Resent status.

# Resend

- Before you begin the process of resending an access code, verify that the current email message and subject line suit your needs. Select "Manage Email" to make any edits.
- Go to the Code Bank Details page and find the row for the specific recipient. Only codes with a status of Issued or Resent can be resent.
- Choose "Resend" from the Actions menu or click "Details" from the actions menu to see more details.
- Alternatively, you can use the bulk resend option to resend access code emails to a group of recipients. Select rows individually or you can select all using the □ box in the far-left column.

Then select "Bulk Resend." The "Bulk Resend" button is inactive until you have selected one or more recipients.

## Revoke

- Follow the same steps as detailed for resending but select "Revoke" as the action.
- The revoked access code will be added back into your pool of remaining access codes. You
  can then issue it to someone else if the code bank status is Active. Or you can issue it to the
  same recipient, using a different email address, if necessary.

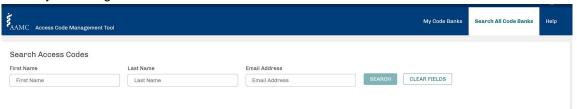


#### Re-issue

- If you need to re-issue an access code to a recipient because their original code expired or was
  previously revoked, follow the steps for issuing an access code to an individual.
- When a code is Revoked or Expired, it has been added back to your total of remaining access codes. You can then issue a new code to the same recipient or another recipient.

# **Searching Across Multiple Code Banks**

If you have only one code bank, sorting and filtering the Code Bank Details table to find a specific recipient is simple. If you have multiple code banks, use the "Search All Code Banks" option in the top menu bar. You can simultaneously search by first name/last name or email address across all code banks you manage.



See the section about managing ACMT tables for more information about filtering and sorting the Search Results table.



From the Search Results table you can open the entire bank by selecting "View Bank," or "Review" the Access Code Details, which will allow you to resend or revoke an access code that is in Issued or Resent status.

# **ACMT Support**

For additional assistance, please contact us at <a href="mailto:acmtsupport@aamc.org">acmtsupport@aamc.org</a>. The AAMC typically responds within one business day. Code banks for MCAT Official Prep and MSAR products are available for purchase, to eligible buyers, in the AAMC Store (store.aamc.org).



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