

# DEMOGRAPHIC UPLOAD TRAINING GUIDE

## ORHIM DEMOGRAPHIC COLLECTION PROJECT

### Uploading a data file or downloading a template

- After logging in, an external user can access the upload page by clicking on the top tab labeled “ORHIM” and the secondary tab titled “Demographics”

To upload:

1. Be sure the correct NAIC number is displayed.
2. Click the "Browse" button below.
3. Use the file selector to choose the file to be uploaded.
4. Once the file is selected, the name of the file should appear in the textbox below.
5. Click the "Upload CSV File" button.

Once the file has been uploaded, it will automatically be processed for errors. If your file is found to have errors, you will need to re-upload the file. At present, there is no way to correct a submitted file.

NAIC Number

Upload File

- To upload a data file, click the “Browse” button and select the file. Then click the “Upload CSV File” button. The system will validate the upload and report any errors. If the file is error-free, the system will display a success message.
- If a template is needed to create the upload file, it can be downloaded by using the template section to the right of the upload section on the Demographics tab.

Assessment Upload Instructions

All uploads for this application must be in CSV (Comma Separated Value) format. Use the button below to download a template.

Rules for submitting CSV format files for this service:

- No commas in numbers.
- All values will be whole numbers.
- First column must match the template.
- The file must contain a header and 3 data rows.

- The history of all uploaded data can be found at the bottom of the Demographics tab. Once a file is uploaded, it is automatically approved by the system and cannot be overwritten. If the file needs to be replaced, an internal user can use the “Unapprove” button to the left of any given row to unlock the data and allow a new file to be uploaded. Only internal users will see the “Unapprove” or “Approve” buttons.

HISTORY

10 records per page

Quarter Start	Quarter End	Uploaded	Status	
04/2016	06/2016	07/25/2016	Approved 07/25/2016	<input type="button" value="Unapprove"/>
01/2016	03/2016	06/28/2016	Pending	<input type="button" value="Approve"/>

Showing 1 to 2 of 2 entries

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- If an internal user disapproves a data row, that row can be approved if it is not overwritten with an upload. The upload history is displayed in reverse order, with the most current data at the beginning of the list.