

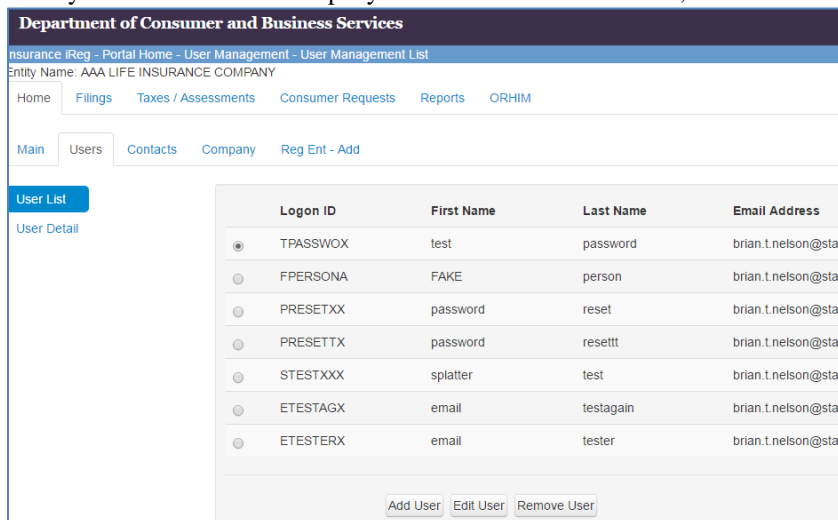
# DEMOGRAPHIC UPLOAD TRAINING GUIDE

## ORHIM DEMOGRAPHIC COLLECTION PROJECT

### Internal Staff

#### Adding a new user to the system (or upgrading an existing user)

- Log into the IREG portal
- Add an external user by first selecting an insurance company.
- Add an internal user by clicking the “Administration” button.
- After you have selected a company or clicked the admin button, click the Users tab



Logon ID	First Name	Last Name	Email Address
TPASSWOX	test	password	brian.t.nelson@stat
FPERSONA	FAKE	person	brian.t.nelson@stat
PRESETXX	password	reset	brian.t.nelson@stat
PRESETTX	password	resettt	brian.t.nelson@stat
STESTXXX	splatter	test	brian.t.nelson@stat
ETESTAGX	email	testagain	brian.t.nelson@stat
ETESTERX	email	tester	brian.t.nelson@stat

- You can click on a user name from the list and then click the “Edit User” button or click the “Add User” button to create a new user account.

- Complete fields at the top of the screen as needed. Some fields may not show or may not be editable by internal users.

- Make sure the “ORHIM External [or Internal] Demographics” box is checked. Then, click the “SAVE” button. The options displayed depend on which type of user you are adding. When adding an individual to a company, the individual is considered an “External” user. If you are in Administration mode, the user is considered “Internal”

- The new user should receive an email within a few minutes, informing them of the new access.

### Downloading the data

- From the home screen, select Administration mode.
- Click the “Reports” tab in the top row.
- Click the “ORHIM Demographics” link.
  - This will take you to the download page within the Report Catalog.
- Follow the on-screen prompts.

## Internal or External Staff

### Uploading a data file or downloading a template

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

- 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.

- 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	Unapprove
01/2016	03/2016	06/28/2016	Pending	Approve

Showing 1 to 2 of 2 entries

← Previous 1 Next →

- 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.