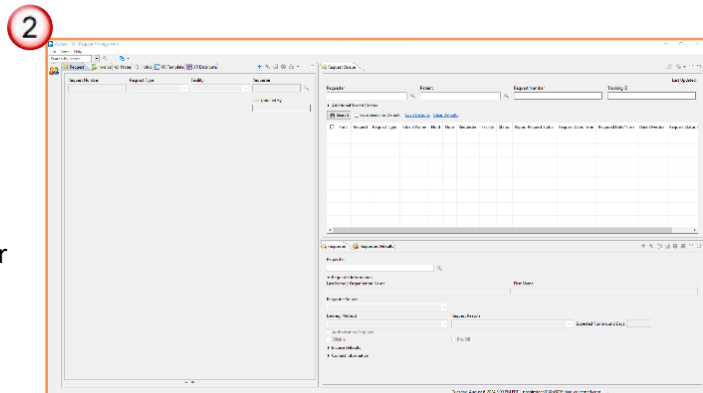HIM ROI ROLES

HIM - Release of Information: Request Management (Update Requester): steps to update an existing requester's information to ensure accuracy.

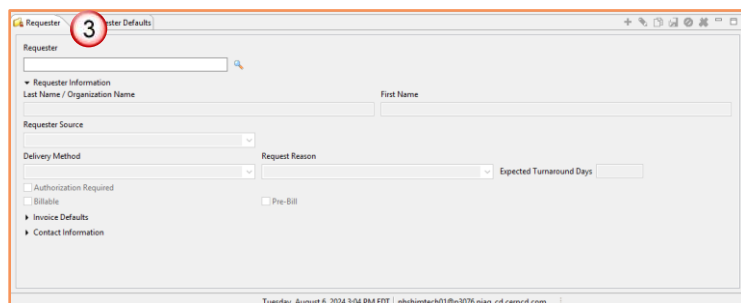1. Log in to **AccessHIM.exe**, Access HIM app.
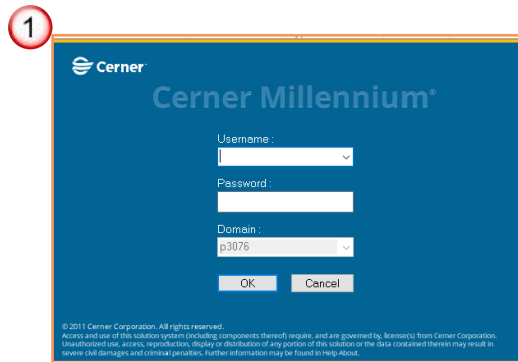
2. Request Management perspective opens automatically.
   (once default settings are defined)

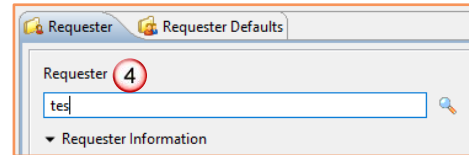**Note:** This default setting is recommended for all HIM ROI Specialists.

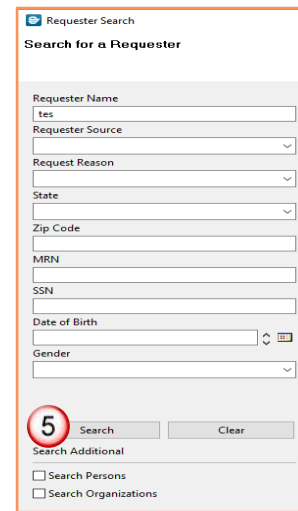3. Navigate to the **Requester** tab.

4. Type in the requester name using a "**minimum of 3 characters**."

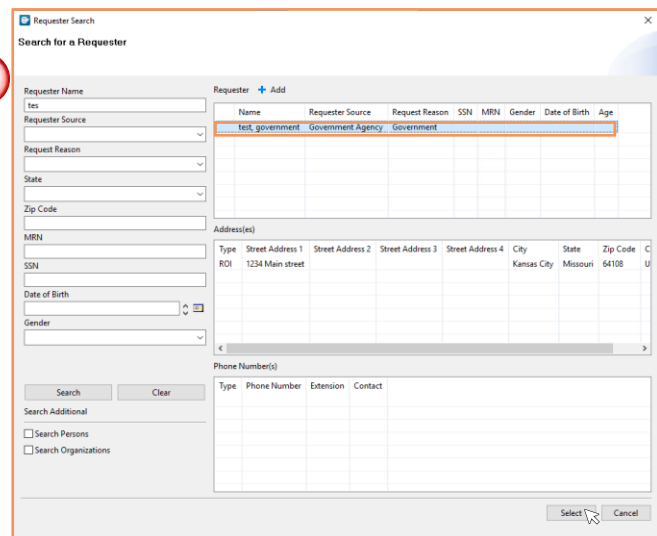**Note:** Using minimal characters helps to minimize requester duplicates.

5. Click **Search** (or press Enter)

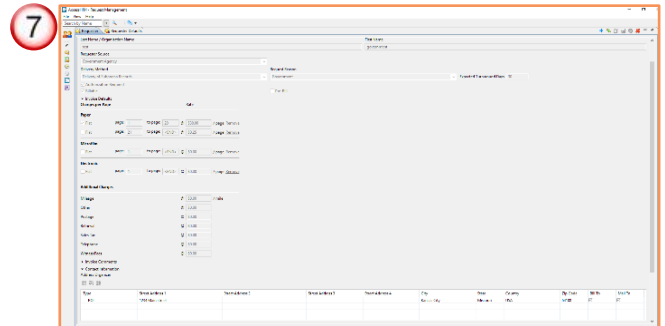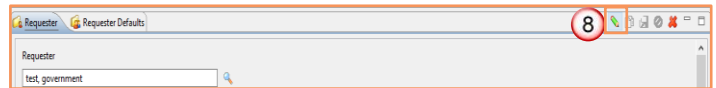6. Decide if the requester was found, click on the correct "**Requester**" name and click **Select.**
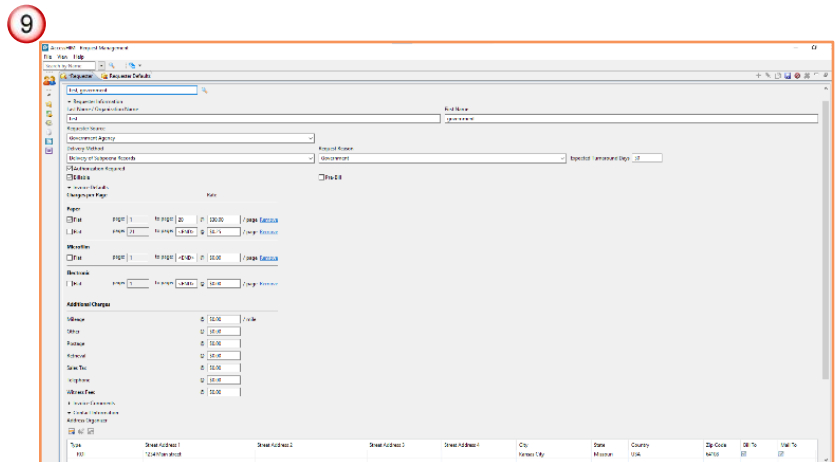
7. Previously saved requester data populates **(Requester Information, Invoice Defaults, and Contact Information)**
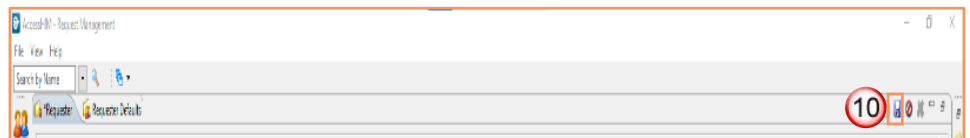

8. Click **Modify Requester.**

9. Update **Requester defaults** (Requester Information, Invoice Defaults, and Contact Information) as needed.
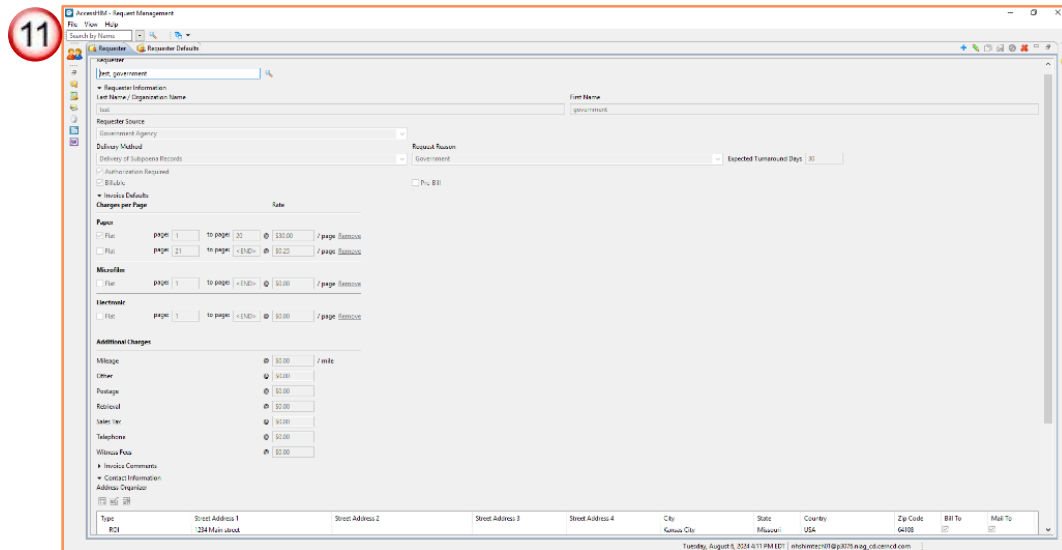

10. Click **Save.**

11. Review all saved requester information. Decide if there are any defaults that need to be adjusted.

Notes: Requester details specific to the request should not be made at this time. For example, delivery method of fax for this request only can be updated when logging and processing the request in the Request Tab.

Reference Workflow Link: *HIM - Release of Information: Request Management (Log Request)*