

.....

# Donate Life California

## Organ & Tissue Donor Registry

### User Guide



# Donate Life California Registry User Guide

## Index

Welcome to the Registry .....	Page 1
Setting Up Your New Account.....	Page 2
Future Logins to the Registry .....	Page 2
Searching .....	Page 3
Error Search Results .....	Page 4
Search Results.....	Page 5
Donor Profile.....	Page 6
Duplicates Profile .....	Page 7
Document of Gift.....	Page 7
Remove Donor.....	Page 7
Edit Profile .....	Page 8
Add Update.....	Page 9
eCampaigns.....	Page 10
Using Existing eCampaigns .....	Page 11
View Archived.....	Page 12
Add eCampaign .....	Page 13
Reports.....	Page 14
Contact Audit Log .....	Page 15
User Audit Report.....	Page 16
Custom Registry Reports .....	Page 17
Registrations by Time Period (Graph) .....	Page 21
Forms & Files.....	Page 23
Upload Registrations .....	Page 23
User Management.....	Page 24
Add New User.....	Page 27
User Permissions .....	Page 27
Audit Log.....	Page 28
Contact.....	Page 29

## ***THIS DOCUMENT IS CONFIDENTIAL***

*The following training materials are confidential and should only be distributed to users that require access to the Donate Life California Registry website in order to complete their ordinary job duties. Per IT Security best practices, please distribute these confidential materials sparingly, redacting information as necessary, and please take all reasonable measures to ensure these materials remain confidential. Thank you.*

# Donate Life California Registry User Guide

## Welcome to the New Donate Life California Registry

We are excited to launch our new registry site on January 22<sup>nd</sup>. This new registry has been designed to upgrade our user experience, increase functionality of the search engine, and add new features to our registry system.

Thank you to all of you who were involved in helping us develop and test this new system.

In order to help you learn the new system we have created a user guide that covers the various features of the site. We will continue to update this user guide as the system will continue to be improved.

For a chance try out what you've learned about the site before the launch, please visit the training site with the below instructions.

- We encourage you to visit the training site here: <https://demodladmin.ddweb.org>
  - This will allow you to practice creating a new password (note it will not save after the launch).
  - Also, this will give you the chance to get comfortable on the new site prior to using it.
  - *Note: The data in the training site is not up to date so do not use the information to determine if someone is a donor.*

Once the new site launches on January 22<sup>nd</sup>, the old registry will no longer be accessible. For this reason, we encourage you to try logging into the training site and reviewing the main features you use.

You will also receive a main contact for your OPO to help address any login in or system problems. Please feel free to also contact Megan MacNee, Donate Life California Program Manager at [megan@donatelifecalifornia.org](mailto:megan@donatelifecalifornia.org) or (916) 678-6006.

We'll also be collecting feedback at: <http://bit.ly/2SGQckR>

## ***THIS DOCUMENT IS CONFIDENTIAL***

*The following training materials are confidential and should only be distributed to users that require access to the Donate Life California Registry website in order to complete their ordinary job duties. Per IT Security best practices, please distribute these confidential materials sparingly, redacting information as necessary, and please take all reasonable measures to ensure these materials remain confidential. Thank you.*

# Donate Life California Registry User Guide

## Setting Up Your New Account:

- Do you have a username to the old system? Your username will continue to work, but you will need to request a new password to access the new registry.
  - Do so by visiting [admin.donatelifecalifornia.org](http://admin.donatelifecalifornia.org).
  - From here click “Request Password”.
  - You will be on a new page where you can enter your email and click the “Request Password” button.
  - You will now receive an email that will allow you to create a new password. You MUST use the link in this email.
- If you do not have a username for the new system, your administrator must create you a new account. Once this is done you will receive an email that includes a link where you can reset your password. Once you’ve done this, you’ll be able to access the registry.

## Future Logins to the Registry:

- Visit [admin.donatelifecalifornia.org](http://admin.donatelifecalifornia.org). Enter your username and password. Click the “Login” button.
- You can also click “Request Password” or “Contact Admin” if you have trouble logging in.




### Administrative Login

Username

Password

Remember my username

[Request Password](#) | [Contact Admin](#)



Total Registrants: 14,592,334  
As of September 28, 2018 - 02:10 PM

# Donate Life California Registry User Guide

## Searching

- Click “Search Donor” which will take you to the home screen and search page.
- Search by entering any of the fields either alone or in combination:
  - Date of Birth - Use when exact DOB is known.
    - Must include full date (month, day, year). Can not do a partial search.
  - Year of Birth
    - This can be used in place of DOB, if DOB is unclear or unknown.
    - You can check +/- 2 years for broader range OR use a wildcard \*.
    - If ran with DOB it will default to DOB results only.
  - Gender
    - X (non-binary) appears in both M and F searches.
  - Names
    - Wildcard \* permissible.
    - Can search by partial or full.
    - Can expand search by phonetic for similar names and alternative spellings.
    - Will search all possible combinations of name fields.
  - County
  - Zip Code - Wildcard \* is permissible.
  - DL / ID # - Use when exact DL# is known
  - Last 4 Digits of DL / ID #
    - Helpful particularly if you’re unsure of the letter that starts the #. Wildcard \* is permissible.

The screenshot shows the 'Search Donor' interface. At the top is a navigation bar with links for Search Donor, eCampaigns, Reports, Forms & Files, Users, and Contact, along with a Sign Out button. The main form is titled 'Search Donor' and includes a 'Reset search' link. The form contains several input fields: Date of Birth (text), Year (text with a '+/- 2 years' option), Gender (radio buttons for M, F, X), First Name (text), Last Name (text), Middle Name (text), County (dropdown menu), Zip Code (text with a placeholder '00000 or 00000-0000'), DL/ID # (text), and Last 4 DL/ID # (text). There are checkboxes for 'Run Phonetic Search' and 'Search Donate Life America Registry'. A blue 'Search' button is located at the bottom right of the form.

# Donate Life California Registry User Guide

## Error Search Results

- If your search brings back over 100 entries, you will get an error page.
- If you'd still like to see all results you can click "View All Results".
- Or you can add additional information to your search and it will provide more refined results to help you bring it under 100 entries.



## Search Donor

[Reset search](#)

### Error Found

There were too many results found in this search (85462 records found). Please provide additional search parameters to refine your search.

Date of Birth	Year	Gender	
<input type="text"/>	<input type="text" value="YYYY"/> <input type="checkbox"/> +/- 2 years	<input type="checkbox"/> M	<input type="checkbox"/> F <input type="checkbox"/> X
First Name	Last Name	Middle Name	
<input type="text" value="Megan"/>	<input type="text" value="MacNee"/>	<input type="text"/>	
<input checked="" type="checkbox"/> Run Phonetic Search			
County	Zip Code	DL/ID #	Last 4 DL/ID #
<input type="text" value="Select"/>	<input type="text" value="00000 or 00000-0000"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Search Donate Life America Registry		<input type="button" value="Search"/>	

# Donate Life California Registry User Guide

## Search Results

- You can sort your relevant results by name, city, source, etc. by clicking the arrows next to the categories.
- Hover over the profile and click to access the “Donor Profile”.
- If result is not found, you can:
  - Click “Run Phonetic Search” on the top right-hand corner to find similar names.
  - Or you can hit back on your back button on your browser or “Return to Search” on the top right-hand corner to add new information to refine your search.
  - You may find profiles that have duplicate records, these most commonly will be DMV and Online profiles. They have the same name and DL/ID#.
    - Click the blue number to see all duplicate profiles.

## Search Results

[← Return to Search](#) [⚙ Run Phonetic Search](#)

Name ▲	City ⇅	Source ⇅	DOB ⇅	Mod. Date ⇅	Status ⇅	Duplicates ⇅
MacNee, Megan	Sacramento	FRM	<del>10/21/1988</del>	09/25/2018	Donor	1
MacNee, Megan <del>Katharine</del>	Sacramento	ONL	<del>10/21/1988</del>	09/20/2018	Donor	2
MacNee, Megan <del>Katharine</del>	Sacramento	ONL	<del>10/21/1988</del>	09/18/2018	Removed From Registry	1

1 - 4 of 4 items

Total Registrations: 14,592,334

As of September 26, 2018 - 02:10 PM

# Donate Life California Registry User Guide

## Donor Profile

- Here you will see all donor information, any past contact, and limitations.
- Additionally, you have access to the document of gift in English and Spanish.
- Depending on permission levels you will also be able to edit donor information or remove the donor from the registry.
- You may see “Registration Upload” as part of the top menu, this is only if a donor registered through a paper form. If they did clicking registration upload will download the pdf of the form signed by the donor.

### Donor Profile

[Removal Letter](#) [Edit Profile](#)

Megan ~~MacNee~~ MacNee

<b>Donor Status:</b>	Removed From Registry	<b>Record Creation Date:</b>	11/09/2017
<b>Gender:</b>	Female	<b>Record Modification Date:</b>	01/04/2019
<b>Date of Birth:</b>	01/01/1911	<b>Registration ID #:</b>	HCZDWNG3XHEXU7Z
<b>Address:</b>	3940 Industrial Blvd, West Sacramento, Yolo	<b>Registration Source:</b>	Online Registry
<b>Phone:</b>	9163403352	<b>Password:</b>	*****
<b>Email:</b>	firstname.lastname@gmail.com		
<b>Mother's Maiden Name:</b>	LastName		
<b>Driver's License (or ID#):</b>	D1234567		
<b>Place of Birth:</b>	Sacramento, CA		

### Limitations

**Organs:**  
Lungs

**Tissues:**

**Other:**

Add Update

Contact Name	Contact Info	Contact D/T	Record Created	Created By	Contact Type	Changes Reques...	Action Taken
Megan Katherine MacNee	9163403352	01/02/2019 02:11	01/04/2019 14:12	Megan MacNee	Phone	Added limitations of lungs.	Limitation of lungs added.



# Donate Life California Registry User Guide

## Duplicate Profiles

- If a profile has a potential duplicate record you will see it noted on the donor profile. Please be sure to use the profile with the most recent modification for reference.

Search Donor eCampaigns Reports Forms & Files Users Contact Q Sign Out

### Donor Profile

[Remove Donor](#) [Edit Profile](#) [Document of Gift](#) [Spanish Document of Gift](#)

Megan ~~Katherine~~ MacNee

This may be a duplicate profile. Click [here](#) to see additional results.

Donor Status:	Donor	Record Creation Date:	09/20/2018
Gender:	Female	Record Modification Date:	09/26/2018
Date of Birth:	<del>10-15-1988</del>	Registration ID #:	J642M4UIC0VZEGS

## Document of Gift

- Click on Document of Gift or Document of Gift Spanish to download document.

## Remove Donor - For Admin Accounts

- Check address is correct. If not, click “Edit Donor” (top right), and update address.
- Click “Remove Donor” on top right.
- Add email address if provided.
- Confirm removal.
- Click “Add Update” button and note type of contact, contact information, request made and action taken.
- If email confirmation not sent, click “Removal Letter” (now on top right). Letter will download.
- Print letter and mail to removed donor.

# Donate Life California Registry User Guide

## Edit Profile - For Admin Accounts

- Click “Edit Profile” on top right.
- Make any requested changes.
- Ensure all \* required fields are filled.
- Click “Save Donor Information” button.
- Click “Add Update” button and note type of contact, contact information, request made and action taken.

The screenshot shows the 'Edit Profile' form for Megan Katherine MacNee. The form is organized into several sections:

- Header:** Search Donor, eCampaigns, Reports, Forms & Files, Users, Contact, Sign Out.
- Profile Summary:** Megan Katherine MacNee, with links for Remove Donor, Edit Profile, Document of Gift, and Spanish Document of Gift.
- Personal Information:** First Name (Megan), Middle Name, Last Name (MacNee), Donor Status (Donor), Gender (M, F, X), Date of Birth, Record Creation Date (09/20/2018), Record Modification Date (09/26/2018), Registration ID # (J542MAUIC0VZEGS).
- Contact Information:** Address, City (Sacramento), State (California), Zip Code (95616), Email, Phone, Driver's License (or ID) #, Mother's Maiden Name, Place of Birth, Password.
- Limitations:** Organs (Heart, Lungs, Kidneys, Liver, Pancreas, Small bowel intestine, Pancreas for islet cells, Spleen & lymph nodes, For Research\*), Tissues (Heart valves, Skin grafts, Eyes/Corneas, Bones, Soft tissue, Pericardium, Vertebral bodies, For Research\*), Other (My gift of tissues may be donated only to non-profit organizations, My gift of skin may be used for life-saving and reconstructive purposes only, My gift of tissues may be used in the United States only).
- Notes:** I don't want to give my brain if that ever becomes scientifically possible.
- Buttons:** Save Donor Information, Cancel.

## Donate Life California Registry User Guide

### Add Update

- Click “Add Update” button.
- Fill out form with information including type of contact, contact information, request made and action taken.
- This should be done whenever a profile is edited or removed, or a donor has been contacted.
- Click “Save”.

**Add Update**

Contact D/T

Contact Type

Changes Requested

Action Taken

**Save** **Cancel**

Contact Name	Contact Info	Contact D/T	Record Created	Created By	Contact Type	Changes Reques...	Action Taken
No records available.							

# Donate Life California Registry User Guide

## eCampaigns (Available based on permissions)

- Click the “eCampaigns” tab on the top menu. This takes you to all the active eCampaigns associated with your OPO.
- Find an existing eCampaign by:
  - Scrolling through the list.
  - Sorting columns with the arrows next to the column titles.
  - Use the search in the top right-hand of the menu within the eCampaigns page.
- Once you’ve found your campaign on this page you can see its registration numbers, edit the eCampaign page, delete the campaign or move to archives.



## Active eCampaigns

[+ Add New eCampaign](#) [View Archived](#) [Search](#)

Event Title ↕	OPO ↕	Start Date ↕	End Date ↕	Count ↕	Delete	Archive
<a href="#">A Second Life Time</a>	OneLegacy	01/01/2013	12/31/2022	4	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">A Story of Love and Loss Allan DeSmith</a>	OneLegacy	01/01/2017	12/31/2022	1	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">AAC Supports Earl - PKD Awareness</a>	Donor Network West	11/11/2017	12/19/2022	0	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">ABC7</a>	OneLegacy	12/27/2013	12/31/2022	12	<input type="checkbox"/>	<input type="checkbox"/>

# Donate Life California Registry User Guide

## Using Existing eCampaign

- Adjust title, dates, URL, delete or archive the existing campaign details by editing fields.
- View sign ups and page views.
- Edit eCampaign public page by using web editor. Add text, format text, insert images, insert links.
  - *Note: All eCampaigns existing prior to the new registry will transfer for tracking purposes but the public pages are still handled on the WordPress pages. These pages will link to the new registry for tracking.*
- Can also make all same changes on Spanish (Done Vida) version of the page, do so by clicking the “Spanish” button.

## eCampaign Profile

[View eCampaigns](#) [View Archived](#) [Search](#)

<b>Event Title</b>	<input type="text" value="Rose Parade Honoree"/>	<b>English</b> <b>Spanish</b>	<b>Start Date</b>	<input type="text" value="10/09/2018"/>	<b>End Date</b>	<input type="text" value="10/09/2023"/>
<b>Webpage URL</b>	<input type="text" value="https://demodlcregister.ddweb.org/roseparadehonoree"/>	<b>Archive</b>	<b>Save</b>			
Number of sign ups: 1 Number of sign ups minus duplicates: 1 Page views: 0						


eCampaign Content **English** **Spanish**

**B I U** **H1 H2** **x<sub>2</sub> x<sup>2</sup>** **Normal** **Normal**

Sans Serif

### *Learn About This Year's Rose Parade Honoree*

Steve Sepulveda was born January 10, 1969, in El Paso TX. He was raised in and lived in Los Angeles until his passing on July 7, 2013 at the age of 44. Steve was a great son, a wonderful father and an amazing husband. He left behind two daughters, his wife, his mother and two siblings. As a kid, Steve had a lot of energy and loved to play sports. He played high school football and basketball and attended Humboldt University after graduating. Steve and his spouse were school friends while in elementary



# Donate Life California Registry User Guide

## View Archived

- Operates same as the active campaigns but allows you to organize past campaigns versus existing. These still track from their links.
- Will automatically move over to this page when its end date occurs.
- Or will be moved when manually marked as archived.
- Can edit same as above eCampaigns. Can also unarchive.

## Archived eCampaigns

[+ Add New eCampaign](#) [View Unarchived](#) [Search](#)

Event Title ↕	OPO ↕	Start Date ↕	End Date ↕	Count ↕	Delete	Unarchive
<a href="#">Alex Guedea Memorial Campaign</a>	OneLegacy	01/01/2013	12/31/2022	0	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Bulldogs</a>	Donate Life California	03/24/2018	03/24/2019	2	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">DonateLifeRoseParadeFloat</a>	Donate Life California	01/03/2018	01/03/2019	1	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Gavin's eCampaign</a>	OneLegacy	11/11/2017	12/31/2022	0	<input type="checkbox"/>	<input type="checkbox"/>

# Donate Life California Registry User Guide

## Add eCampaign

- Click “Add New eCampaign” link
- Add event title.
  - This will auto create a URL which you can then edit.
- Dates will populate start date of current date and end date as five years from now. You can edit by scrolling through the pop out calendars.
- Click the “Spanish” tab to also create a page for the Done Vida site.
- Edit auto filled URL if needed.
- Edit eCampaign public page in web editor.
  - Type and format text.
  - Insert images or videos.
  - Add any links.
- Click “Add eCampaign”.
- Click the hyperlink to view new public eCampaign page.

## Add eCampaign

[View eCampaigns](#) [View Archived](#) [Search](#)

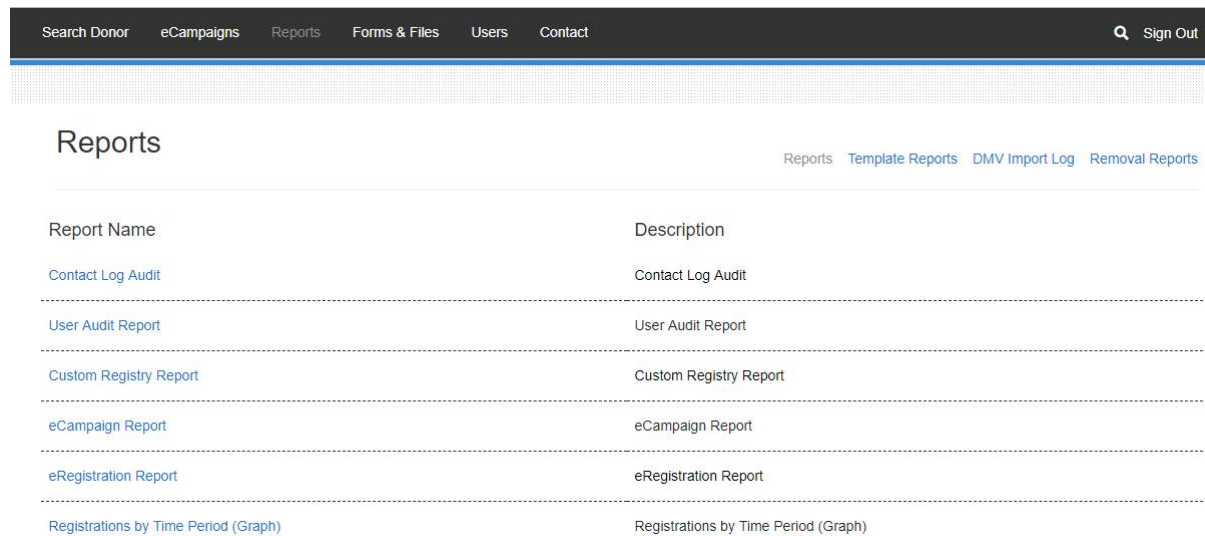
Event Title	<input type="text"/>	<a href="#">English</a> <a href="#">Spanish</a>	Start Date	<input type="text" value="10/26/2018"/>	End Date	<input type="text" value="10/26/2023"/>
Webpage URL	<a href="https://demodlcregister.ddweb.org/">https://demodlcregister.ddweb.org/</a>	<input type="text"/>	<input type="button" value="Cancel"/>	<input type="button" value="Add eCampaign"/>		
eCampaign Content	<a href="#">English</a> <a href="#">Spanish</a>					
<p><b>B I U</b>    H<sub>1</sub> H<sub>2</sub>   x<sub>2</sub> x<sup>2</sup>    Normal  Normal    Sans Serif   </p> <p> </p> <p>Insert text here ...</p>						

# Donate Life California Registry User Guide

## Reports (Available based on permissions)

The reports section is the area of the site that will differ the most from the old registry. With that, once you take a few minutes to learn it, you'll find additional abilities and we hope you will find it user friendly in the long run. With that, please do provide us feedback. You'll also note that while basic reporting is now available, some of the features are still in development. We will update you as they are added.

- To access, click "Reports" in top menu. This will take you to a list of available reports (the reports listed may differ based on permission level).
  - Contact Audit Log: Tracks contacts by donors for changes, updates, removals, etc.
  - User Audit Log: Tracks all users of the registry including last login.
  - Custom Report Registry: Search donor data for statistics and trends.
  - eCampaign Report: Track eCampaigns registrations.
  - Registration by Time Period (Graph): Creates graphs of a filtered selection of donors by day, week, month and year.
  - Removal Reports: Tracks all removals from the registry.



The screenshot shows the 'Reports' section of the user interface. At the top, there is a navigation bar with links for 'Search Donor', 'eCampaigns', 'Reports', 'Forms & Files', 'Users', and 'Contact'. A search icon and 'Sign Out' link are also present. Below the navigation bar, the 'Reports' title is displayed, followed by a breadcrumb trail: 'Reports > Template Reports > DMV Import Log > Removal Reports'. The main content area contains a table with two columns: 'Report Name' and 'Description'. The table lists several reports, each with a link to its details page.

Report Name	Description
<a href="#">Contact Log Audit</a>	Contact Log Audit
<a href="#">User Audit Report</a>	User Audit Report
<a href="#">Custom Registry Report</a>	Custom Registry Report
<a href="#">eCampaign Report</a>	eCampaign Report
<a href="#">eRegistration Report</a>	eRegistration Report
<a href="#">Registrations by Time Period (Graph)</a>	Registrations by Time Period (Graph)



## Donate Life California Registry User Guide

### Contact Log Audit

This report displays contact by donors to registry users including the request they made, and action taken. This includes changes to donor profiles and removals.

- Click on “Contact Log Audit” to access report.
- To run the report, select:
  - Start and End Dates.
  - Organization.
  - Contact Type.
  - Click the “View Report” button on the top right.
- Use the menu bar to:
  - Move from various pages of the report.
  - Search results (this works similar to the “find” function in Word or your browser).
  - Download the report in a variety of formats.
  - Refresh the report.

The screenshot shows a web interface for generating a report. It includes the following elements:

- Start Date:** A text input field with a calendar icon, followed by a checked checkbox and the text "NULL".
- End Date:** A text input field containing "1/9/2019" with a calendar icon.
- Organization:** A dropdown menu currently set to "All".
- Contact Type:** A dropdown menu currently set to "All".
- View Report:** A button located on the right side of the filter area.
- Navigation Bar:** Located below the filters, it contains navigation icons (back, forward, search), a page indicator showing "1 of 1", and a search box with the text "Find | Next".

### Contact Log Audit Report

Donor Name	Contact Info	Contact Date Time	Created Date Time	Created By	Contact Type	Changes
------------	--------------	-------------------	-------------------	------------	--------------	---------

# Donate Life California Registry User Guide

## User Audit Report

This report shows all users, their permission levels, contact information, agreement status and last login.

- Click on “User Audit Report” to access report.
- To run the report, select:
  - Organization.
  - User Type.
  - Deleted Users (Yes or No).
  - Click the “View Report” button on the top right.
- Use the menu bar to:
  - Move from various pages of the report.
  - Search results (this works similar to the “find” function in Word or your browser).
  - Download the report in a variety of formats.
  - Refresh the report.

Organization:  User Type:  Deleted Users:

1 of 2 ? Find | Next

## User Audit Report

Username	Full Name	OPO	User Type	Permission Level	Email	Phone
<del>abraham</del>		Donate Life California	Basic	10		
<del>abraham</del>		Donate Life California	Basic	10		
<del>abraham</del>		Donate Life California	Basic	10		
<del>BPago</del>		Donate Life California	Basic	10		
<del>hmad</del>		Donate Life California	Super Admin	30		
<del>breson</del>		Donate Life California	Basic	10		
<del>Comer</del>		Donate Life California	Basic	10		
<del>dolan</del>		Donate Life California	Basic	10		
<del>DLGuest</del>		Donate Life California	Admin	20		
<del>EBurch</del>		Donate Life California	Basic	10		
<del>efinkelstein</del>		Donate Life California	Basic	10		
<del>eromero</del>		Donate Life California	Admin	20		

## Donate Life California Registry User Guide



### *Custom Registry Reports*

Here you can find total numbers of donors as well as the number of donors filtered by time ranges, demographics and geographic parameters.

- Click on “Custom Registry Report” to access report.
- When you open the report, all filters default to ALL.
- To run the report, select:
  - Time range by typing X/X/XX, selecting dates in the calendar or by checking the NULL box.
  - Then select any additional filters you’d like to narrow your data.
    - Geographic Filters:
      - By OPO: Service areas for each OPO.
      - By Counties:
        - Select All or some counties in the County dropdown  
OR
        - You may enter county names as free-text using the “Enter County Name(s)” field. To include multiple counties, hit the “Enter” key on your keyboard before typing the next county. Then you can enter as many counties as you would like to include. Once your list is complete, click outside of the Enter County Name(s) field to save the list.
          - NOTE: To switch back to ALL counties, delete the counties typed and replace by typing ALL. You can then search by ALL or select ones in the dropdown.
      - By Cities:
        - Select All or some cities in the City dropdown  
OR
        - You may enter city names as free-text using the “Enter City Name(s)” field. To include multiple cities, hit the “Enter” key on your keyboard before typing the next city. Then you can enter as many cities as you would like to include. Once your list is complete, click outside of the Enter City Name(s) field to save the list.
          - NOTE: To switch back to ALL cities, delete the cities typed and replace by typing ALL. You can then search by ALL or select ones in the dropdown.
      - By Zip Code:
        - Select All or some zip codes in the Zip Code dropdown  
OR

## Donate Life California Registry User Guide

- You may enter zip codes as free-text using the “Enter Zip Code(s)” field. To include multiple zip codes, hit the “Enter” key on your keyboard before typing the next zip code. Then you can enter as many as zip codes as you would like to include. Once your list is complete, click outside of the Enter Zip Code(s) field to save the list.
  - NOTE: To switch back to ALL zip codes, delete the zip codes typed and replace by typing ALL. You can then search by ALL or select ones in the dropdown.
- Demographic Filters:
  - Age: Broken down by census categories for age.
  - Gender: Options are M, F & X. X is a new, non-binary option made available by the DMV.
  - Ethnicity: Ethnicity data is only available for County-Level or Statewide data (due to the limitations of census data). Note that the breakdown reflects the ethnicity of the total population of the given area, *not* the ethnic breakdown of the donor-designated population, since that data is not widely collected.
- Registration Type:
  - You MUST select one option to run the report. Select ALL to get all forms of registration.
  - Or select the specific type: paper, mobile, eCampaign, etc. you’d like to search.
- Click the “View Report” button on the top right.

Start Date	<input type="text" value="1/1/2019"/>  <input type="checkbox"/> NULL	End Date	<input type="text" value="1/9/2019"/>  <input type="checkbox"/> NULL	<input type="button" value="View Report"/>
OPO	<input type="text" value="DNW, LS, OL, SDS"/>	Enter County Name(s):	<input type="text" value="All"/>	
Enter City Name(s):	<input type="text" value="All"/>	County	<input type="text" value="Alameda, Alpine, Amador, Butte, C"/>	
City	<input type="text" value="Adelanto, Agoura Hills, Alameda, A"/>	Enter Zip Code(s):	<input type="text" value="All"/>	
Age	<input type="text" value="13-18 yrs, 19-24 yrs, 25-44 yrs, 4"/>	Zip Code	<input type="text" value="90001, 90002, 90003, 90004, 900"/>	
Gender	<input type="text" value="Male, Female, X"/>	Ethnicity	<input type="text" value="Hispanic, White, Asian, Black or A"/>	
Registration Type	<input type="text"/>			

## Donate Life California Registry User Guide

- Use the menu bar to:
  - Move from various pages of the report.
  - Search results (this works similar to the “find” function in Word or your browser).
  - Download the report in a variety of formats.
  - Refresh the report.
- The Results of the “Custom Registry Report”
  - Total Donors: The number of donors according to your selected filters.
  - Total Population: This is available for statewide and county-based searches. The data comes from the updated census estimates.
  - Donor Designation: This is available for statewide and county-based searches. This compares the above Total Donors and Total Population to create a Donor Designation for the specified filters.
  - Ethnicity: This is available for statewide and county-based searches. The data comes from the updated census estimates. This is NOT the representation of the donor database but instead the geographic area’s ethnicity.
  - eCampaigns Total: How many were registered by all eCampaigns based on your filters.
  - Graph: The number of donors listed and represented visually by month of the above Total Donors.
    - *Note: More options for graphs by days, weeks, months and years are available under the Registrations by Time Periods (Graph) Report.*

# Donate Life California Registry User Guide

## Custom Registry Report



**Total Donors:** 853,754

**Total Population of Areas:** 39,027,296  
 Population Data available for County-Level or Statewide data.

**Donor Designation:** 38.4%  
 Donor Designation Rate available for County-Level or Statewide data.  
 Donor Designation Rate includes entire population of designated geographic area.

**Gender Split of Donors:** 49% Male      51% Female      0% X

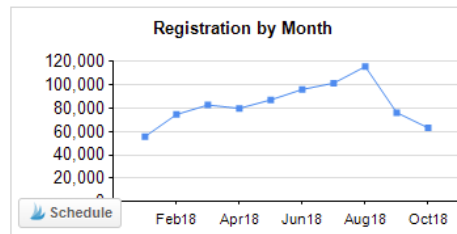
**Age Range of Donors:** 8% 13-18 yrs      18% 19-24 yrs      36% 25-44 yrs  
 25% 45-64 yrs      12% Over 65 yrs

**Ethnicity:** Ethnicity Data available for County-Level or Statewide data. Breakdown reflects ethnicity of the total population of the given area.

39.3% Hispanic	58.3% White
14.8% Asian	5.8% Black or African American
0.4% Native Hawaiian or Other Pacific Islander	0.8% American Indian or Native Alaskan

**eCampaigns Total:** 1,995

Data by Month	Registration
January 2018	55,827
February 2018	74,660
March 2018	82,822
April 2018	79,921
May 2018	87,235
June 2018	96,141
July 2018	101,559
August 2018	115,722
September 2018	76,297
October 2018	63,261

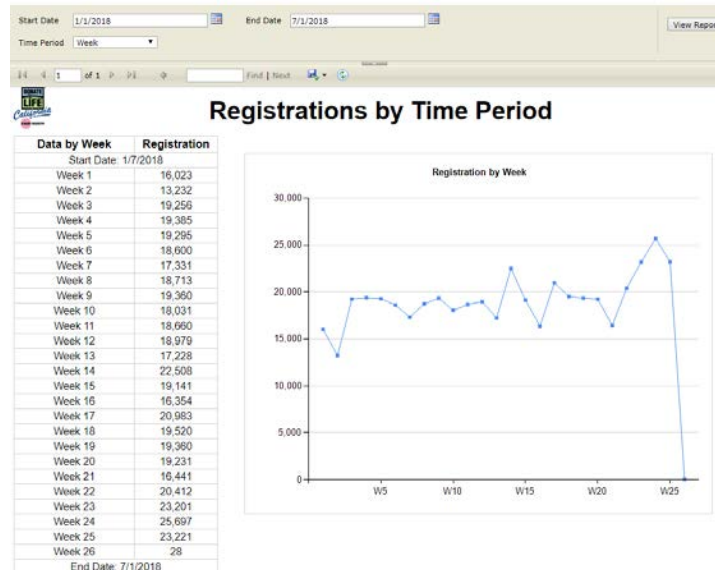


# Donate Life California Registry User Guide

## Registrations by Time Period (Graph)

This report will create a graph of the total donors by a selected time range including days, weeks, months and years. This will also provide a breakout of the number of donors over each of those time periods.

- Click on “Registrations by Time Period” to access report.
- To run the report, select:
  - Fill out filters just as in the “Custom Registry Report”.
  - Then, also select the “Time Period” you’d like to have the chart broken up as.
  - Click the “View Report” button on the top right.
- Use the menu bar to:
  - Move from various pages of the report.
  - Search results (this works similar to the “find” function in Word or your browser).
  - Download the report in a variety of formats.
  - Refresh the report.



## Removal Report

## Donate Life California Registry User Guide

This report shows all removals during a selected time period. This is only available to Super Users.

- Click on “Removal Report” to access report.
- To run the report, select Start and End Dates.
- Click the “View Report” button on the top right.
- Use the menu bar to:
  - Move from various pages of the report.
  - Search results (this works similar to the “find” function in Word or your browser).
  - Download the report in a variety of formats.
  - Refresh the report.

### *Functions in Development*

- Personalized reports.
- eRegistration reports (mobile app).



# Donate Life California Registry User Guide

## Forms & Files (Available based on permissions)

### Upload Registration - Paper Forms

- Click “Forms & Files” or Click “Registration Upload” in dropdown menu.
  - Click “Registration Upload”
    - Here are all paper forms that have been uploaded.
  - Click “Registration Upload”
  - Type in all information on the paper form. Review to ensure all information is correct.
  - Click “Upload Form” button to attach PDF to the profile.
  - Once uploaded click the “Submit” button.
  - Donor is now added. Their profile will reflect entered details and the pdf of the form will be included.

Registration Upload [Registration Upload](#) [Content Editor](#) [Template Files](#)

First Name*	Middle Name	Last Name*
<input type="text"/>	<input type="text"/>	<input type="text"/>
Gender*	Date of Birth*	Place of Birth
<input type="radio"/> M <input type="radio"/> F <input type="radio"/> X	<input type="text" value="mm/dd/yyyy"/>	<input type="text"/>
Address*	City*	State* Zip Code*
<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>
Driver's License (or ID) #*	Phone Number	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>

**Limitations**

<b>Organs</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Heart</li><li><input type="checkbox"/> Lungs</li><li><input type="checkbox"/> Kidneys</li><li><input type="checkbox"/> Liver</li><li><input type="checkbox"/> Pancreas</li><li><input type="checkbox"/> Small bowel intestine</li><li><input type="checkbox"/> Pancreas for islet cells</li><li><input type="checkbox"/> Spleen &amp; lymph nodes</li><li><input type="checkbox"/> For Research*</li></ul>	<b>Tissues</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Heart valves</li><li><input type="checkbox"/> Skin grafts</li><li><input type="checkbox"/> Eyes/Corneas</li><li><input type="checkbox"/> Bones</li><li><input type="checkbox"/> Soft tissue (including ligaments, tendons, blood vessels)</li><li><input type="checkbox"/> Pericardium</li><li><input type="checkbox"/> Vertebral bodies</li><li><input type="checkbox"/> For Research*</li></ul>	<b>Other</b> <ul style="list-style-type: none"><li><input type="checkbox"/> My gift of tissues may be donated only to non-profit organizations</li><li><input type="checkbox"/> My gift of skin may be used for life-saving and reconstructive purposes only</li><li><input type="checkbox"/> My gift of tissues may be used in the United States only</li></ul>
---	---	--

Notes

# Donate Life California Registry User Guide

## User Management (Available based on permissions)

- Click on “Users” on the tab or the “User Management” tab on the drop down.
  - This tab will show all users in your OPO.
- Find existing users by:
  - Scrolling through the list.
  - Sorting columns with the arrows next to the column titles.
  - Use the search in the top right-hand of the menu within the User Management page.

## User Management

[+ Add New User](#) [Audit Log](#) [My Profile](#) [Search User](#)

Registered User ↕	OPO ↕	Permission Level ↕	Last Login ↕	Delete
<a href="#">aalvarez</a>	OneLegacy		08/18/2018 15:54:43	<input type="checkbox"/>
<a href="#">aalvarez2</a>	OneLegacy		08/18/2018 15:51:28	<input type="checkbox"/>
<a href="#">aanderson</a>	Donor Network West		07/13/2017 10:18:37	<input type="checkbox"/>
<a href="#">abolaris</a>	OneLegacy		08/06/2018 11:36:04	<input type="checkbox"/>
<a href="#">Abraham, Ametta</a>	Donor Network West	Donor Search		<input type="checkbox"/>
<a href="#">abucholtz</a>	OneLegacy		04/03/2018 05:51:31	<input type="checkbox"/>

# Donate Life California Registry User Guide

- Click on your desired user.
  - Here you can update information and permissions.
  - Must have \* (required fields).
  - Only enter password if you want to change it.
  - Click “Save” to save changes.

## Edit User

[User Management](#) [Audit Log](#) [My Profile](#) [Confidentiality Agreement](#)

<b>Username*</b> <input type="text" value="ruy.laredo"/>	<b>First Name*</b> <input type="text" value="Ruy"/>	<b>Last Name*</b> <input type="text" value="Laredo"/>	
<b>OPO*</b> <input type="text" value="Donate Life California"/>	<b>Password</b> <input type="password"/> <small>Password is only reset if specified, otherwise leave blank.</small>		
<b>Address*</b> <input type="text" value="3940 Industrial Blvd."/>	<b>City*</b> <input type="text" value="West Sacramento"/>	<b>State*</b> <input type="text" value="California"/>	<b>Zip Code*</b> <input type="text" value="95691"/>
<b>Email*</b> <input type="text" value="ruy@donatelifecalifornia.org"/>	<b>Phone*</b> <input type="text" value="9166786046"/>	<input type="button" value="Save"/>	
<b>Mobile Permission Level*</b> <input type="checkbox"/> <input type="text" value="Select"/>	<b>Web Permission Level*</b> <input checked="" type="checkbox"/> <input type="text" value="Super User"/>		

# Donate Life California Registry User Guide

- To see all actions taken by user click “Audit Log” link.
  - Here you can see all type of actions. Click on individual action to see further details.

## User Log

[User Management](#)

Action Type	Count
<a href="#">Login</a>	20
<a href="#">Admin Profile Saved Auth</a>	5
<a href="#">Admin Viewed</a>	9
<a href="#">Donor Limitations Saved</a>	4
<a href="#">Donor Saved</a>	6
<a href="#">Donor Search</a>	67

Drill down to action completed:

## Donor Viewed

[User Management](#)

	Old Values	New Values
01/04/2019 15:27		
First Name		
Middle Name		
Last Name		
Full Name		
Donor Status	Donor	
Gender	M	
Address		
City		
State	CA	
Zip Code	92548	
Date of Birth	f072c1c51c69f68ce96eaefe90049e1c	
Year of Birth	1992	
Driver's License (or ID #)	e1d09e55b54aaeea5383edbeb972d4cc	
Driver's License Last 4	2204	

Note: Date of Birth and DL are encrypted

## Donate Life California Registry User Guide

### Add New User

- Click “Add User” on right hand corner.
- Fill out all information, especially fields marked with \*.
- Username and password will auto populate. (Only edit username if error occurs).
- Set permission levels. (See below).
- Click the “Submit User” button to create new user.
  - This sends an email with instructions to login and change password.

### User Permissions:

- Super User – Full access to the site/database. Ability to edit donor profiles.
- Lead Administrator – Full access other than removal report. Linked to a specific OPO, can only see/modify users in their respective OPO. Ability to edit donor profiles.
- Administrator – Access only to donor search, reports, eCampaigns, registration upload and mobile app.
- Donor Search Lead – Access only to donor search. Also has ability to create Donor Search users that they can manage. Linked to an OPO, but can only edit their users.
- Donor Search – Access only to donor search

### Add User

[User Management](#) [My Profile](#)

<b>First Name*</b>	<b>Last Name*</b>	<b>Username*</b>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
<b>Password*</b>	<b>OPO*</b>		
<input type="password"/>	<input type="text" value="Select"/>		
<b>Address*</b>	<b>City*</b>	<b>State*</b>	<b>Zip Code*</b>
<input type="text"/>	<input type="text"/>	<input type="text" value="Select"/>	<input type="text"/>
<b>Email*</b>	<b>Phone*</b>	<input type="button" value="Submit User"/>	
<input type="text"/>	<input type="text"/>		
<b>Mobile Permission Level*</b>	<b>Web Permission Level*</b>		
<input type="checkbox"/> <input type="text" value="Select"/>	<input type="checkbox"/> <input type="text" value="Select"/>		

# Donate Life California Registry User Guide

## Audit Log

- This section tracks all actions on the site by all users. You can review actions by type or by user.
- To view a user’s audit log head to the “User Management” page and click on that user. Then click “Audit Log” from their profile.
- Click “Audit Log” to select.
- Click on type of action you’d like to review. Here you’ll have all actions by users.

## Audit Log

[User Management](#)

Action Type	Count
<a href="#">Login</a>	297
<a href="#">Admin Deleted</a>	0
<a href="#">Admin Forgot Password</a>	22
<a href="#">Admin Saved Auth</a>	0
<a href="#">Admin Saved Details</a>	3
<a href="#">Admin Donor Removal Report</a>	0
<a href="#">Admin Profile Saved Auth</a>	34
<a href="#">Admin Profile Saved Details</a>	0
<a href="#">Admin Viewed</a>	88

# Donate Life California Registry User Guide

## Contact

- Here you'll find your OPO's contact to reach out to for any problems, login issues, etc.
  - DLC staff is also available when needed for troubleshooting.
- 

## Contact Us

---

### Donate Life California

Jim Martin

Chief Executive Officer

Phone: 916-678-6044

Email: [jim.martin@donatelifecalifornia.org](mailto:jim.martin@donatelifecalifornia.org)

### Donate Life California

Megan MacNee

Program Manager

Phone: 916-678-6006

Email: [megan@donatelifecalifornia.org](mailto:megan@donatelifecalifornia.org)

### Sierra Donor Services

Deanna Santana

Work: 916-678-6015

Email: [dsantana@dcids.org](mailto:dsantana@dcids.org)

### Donor Network West

Work: 888-570-9400

Email: [info@dnwest.org](mailto:info@dnwest.org)

### Lifesharing

Samantha Blaz

Work: 619-543-4965

Email: [sblaz@ad.ucsd.edu](mailto:sblaz@ad.ucsd.edu)

### OneLegacy

OneLegacy Helpdesk

Work: 213-356-5250