



USER GUIDE, PART 2 – COMPLETING A MATCH

SECURELY UPLOAD DATA AND VIEW YOUR MATCH RESULT

This guide covers the types of file upload available to users, choosing a dataset and submitting a match, as well as viewing and understanding a match result.

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INTRODUCTION

Purpose

This guide explains how to use the Meridian application to securely upload data, submit match requests and review approved match results.

About

Meridian is a secure data matching platform that enables organisations to upload customer datasets for matching against authorized IMI datasets.

The application provides a streamlined workflow for file submission, validation, approval, and result retrieval while maintaining data privacy and security.

UPLOADING A FILE

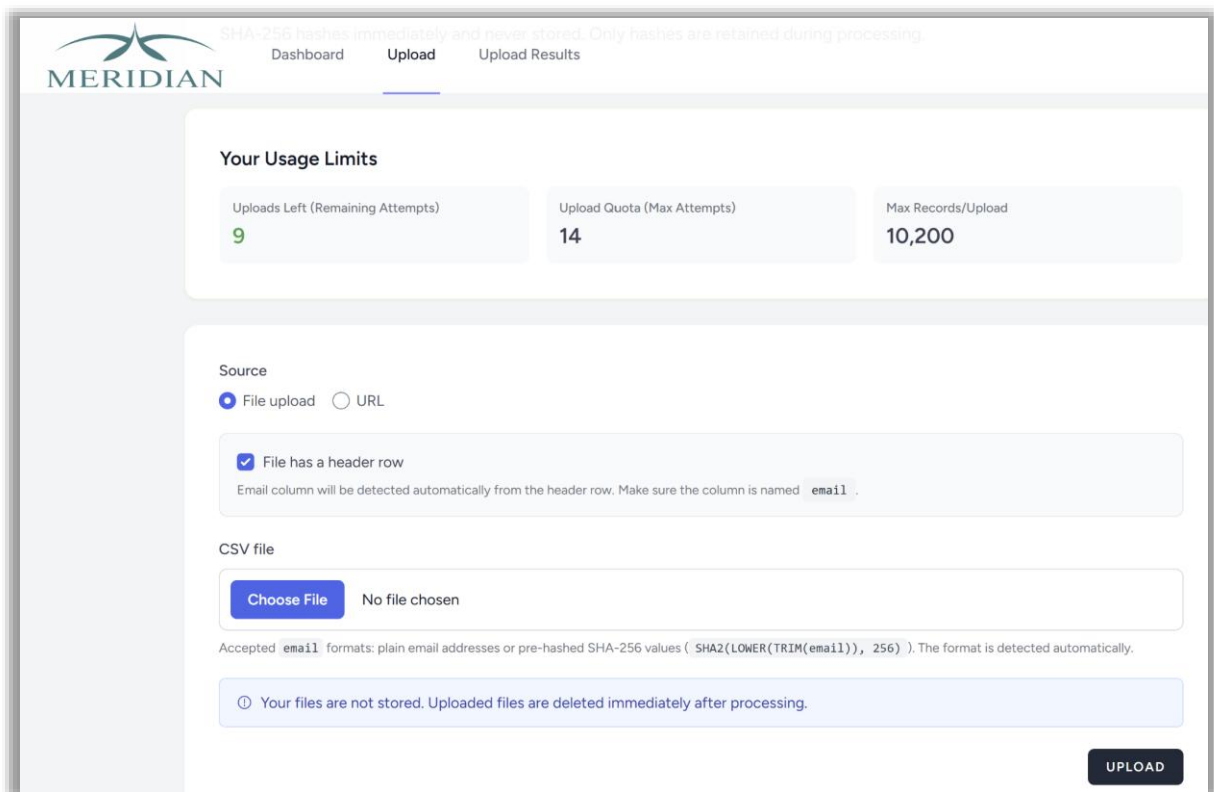
Overview

The upload portal allows users to securely upload records for matching. Datasets available to match against will be assigned by your account manager and outlined prior to release. Users will see their usage and upload limits, which will have been set by their account manager based on project details.

Before you begin

- Ensure your file format is .CSV.
- All required columns are present, including email address (hashed or raw).
- File contents and format comply with your Data Processing Agreement.
- If the .CSV file has a header, the email column will be detected automatically from the header row.
- If the .CSV file does not contain a header but user has selected 'file has a header', an error message will be displayed.
- If the CSV file has a header, select the row number before uploading the file.

Upload from computer



The screenshot shows the 'Upload' tab of the Meridian interface. At the top, a message states: 'SHA-256 hashes immediately and never stored. Only hashes are retained during processing.' Below this is a navigation bar with 'Dashboard', 'Upload', and 'Upload Results'. The 'Your Usage Limits' section displays three metrics: 'Uploads Left (Remaining Attempts)' at 9, 'Upload Quota (Max Attempts)' at 14, and 'Max Records/Upload' at 10,200. The 'Source' section has two radio buttons: 'File upload' (selected) and 'URL'. Below this is a checkbox 'File has a header row' which is checked, with a note: 'Email column will be detected automatically from the header row. Make sure the column is named email.' The 'CSV file' section features a 'Choose File' button and the text 'No file chosen'. A note below states: 'Accepted email formats: plain email addresses or pre-hashed SHA-256 values (SHA2(LOWER(TRIM(email))), 256). The format is detected automatically.' A light blue box at the bottom contains a warning: 'Your files are not stored. Uploaded files are deleted immediately after processing.' An 'UPLOAD' button is located in the bottom right corner.

1. Navigate to Upload
2. Click Choose File
3. Select the .CSV file
4. Click **Upload**

Only .CSV files are accepted; other formats will generate an error and cannot be processed.

Upload from URL

Instead of uploading a local file, users can provide a .CSV URL.

Supported locations include:

- Amazon (AWS) S3 presigned URL
- Dropbox

Source

☐ File upload
☒ URL

☒ File has a header row

Email column will be detected automatically from the header row. Make sure the column is named `email`.

CSV URL

https://example.com/path/to/data.csv

Need help getting a URL?

From an Amazon S3 bucket

1. Open the AWS S3 console and go to your bucket.
2. Select your CSV object.
3. Choose Object actions → Share with a presigned URL.
4. Set an expiry that covers processing (e.g. 1 hour), then Create presigned URL.
5. Copy the URL and paste it into the field above.

Amazon S3 › your-bucket

Object actions ▾

Share with a presigned URL

☒ contacts.csv

Presigned URLs expire — generate the link right before uploading. Your bucket can stay **private**; you don't need to make the file public.

From Dropbox

1. In Dropbox, hover the file and click Copy link (or Share → Copy link).
2. Paste the link into the field above.

☒ contacts.csv

Share

https://www.dropbox.com/s/ab12cd/contacts.csv?dl=0

Your files are not stored. Uploaded files are deleted immediately after processing.

UPLOAD

Select a file or enter a URL to proceed.

Upload Steps

1. Select Upload via URL
2. Paste the .CSV URL
3. Enable Header Row if applicable
4. Click **Upload**

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Upload from URL (Amazon (AWS) S3 presigned URL)

1. Open the AWS S3 console and go to your bucket
2. Select your .CSV object
3. Choose Object actions → Share with a presigned URL
4. Set an expiry that covers processing (e.g. 1 hour), then Create presigned URL
5. Copy the URL and paste it in the .CSV URL box
6. Click on **Upload**

Upload from URL (Dropbox)

1. Open Dropbox in web view
2. Select the .CSV file
3. Hover over the file and click on the copy link
4. Paste the link in the .CSV URL box
5. Click on **Upload**

MATCH PROCESSING

Once uploaded:

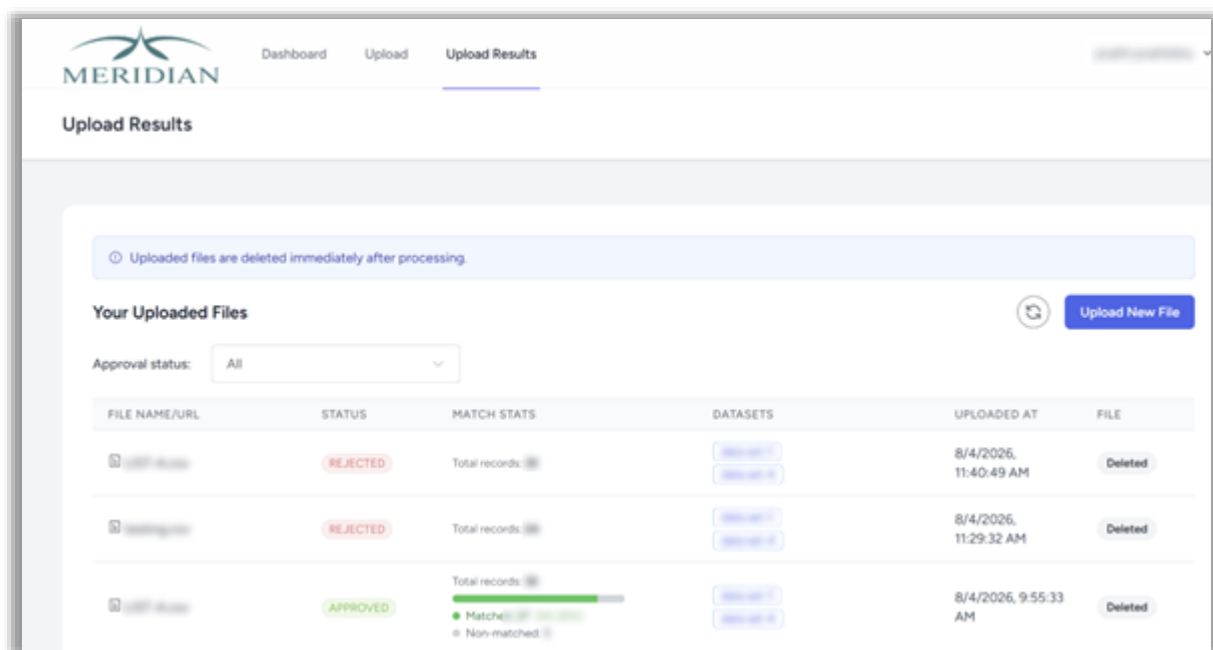
1. File Validation
2. Secure Processing
3. Pending Approval
4. Match Approved or Rejected

Uploaded files are deleted immediately after processing for security.

VIEWING YOUR MATCH RESULT

Once your match result is approved:

1. Open the Upload Results page in the Meridian Dashboard
2. Select the completed request
3. Review the match results



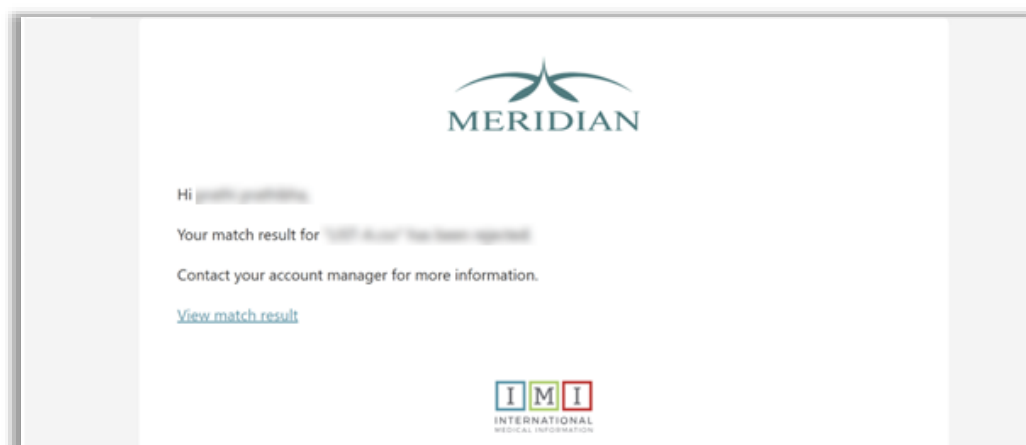
EMAIL NOTIFICATIONS

Users can receive notifications for:

- Account registration
- Match Request Approved and is available for view
- Match Request Rejected

For approved requests:

1. Open the email
2. Click View Match Results
3. Sign in if prompted
4. View the results



TROUBLESHOOTING & SUPPORT

Error	Possible Cause	Resolution
Unable to login	Invalid credentials or authentication code.	Verify credentials and authentication code.
CSV rejected	Incorrect file format.	Upload a valid CSV file.
URL upload failed	URL inaccessible.	Verify the URL and ensure it is publicly accessible if required.
Upload pending	Awaiting administrator review.	Check the status later or contact your account manager for further information.

For further support and information please contact your account manager.