Bulk Upload Conversion Tool
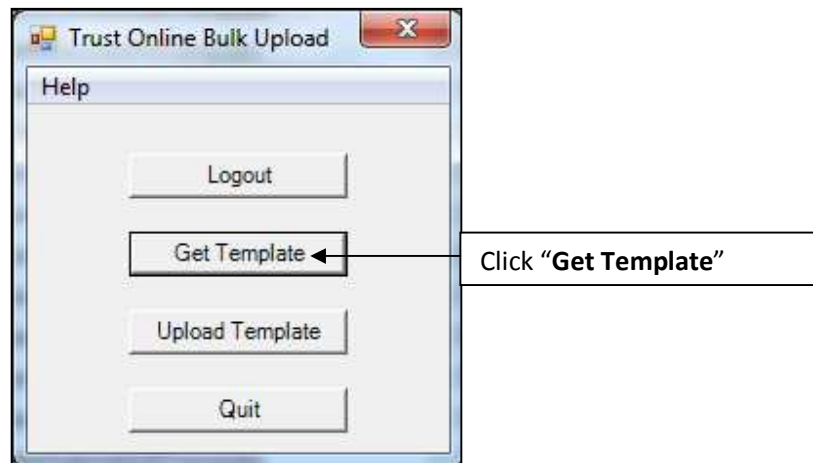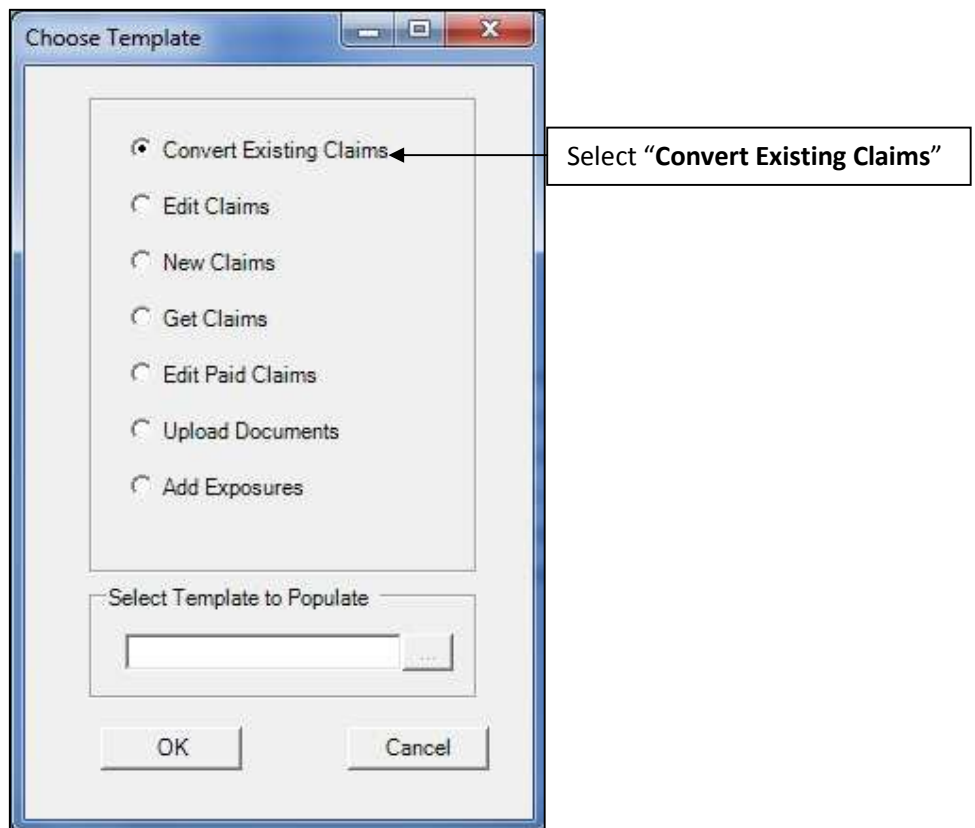
1. To begin converting claims, first log into the Bulk Upload tool and click on the Get Template button.

Click "**Get Template**"

2. The "**Choose Template**" box will appear with a list of templates that are available for downloading. Click on the "**Convert Existing Claims**" template to download it.

Select "**Convert Existing Claims**"

3. The "**Choose Primary Trust**" box will appear with a drop-down of Trust that the user has access too. Select the Trust for the new claims submissions.
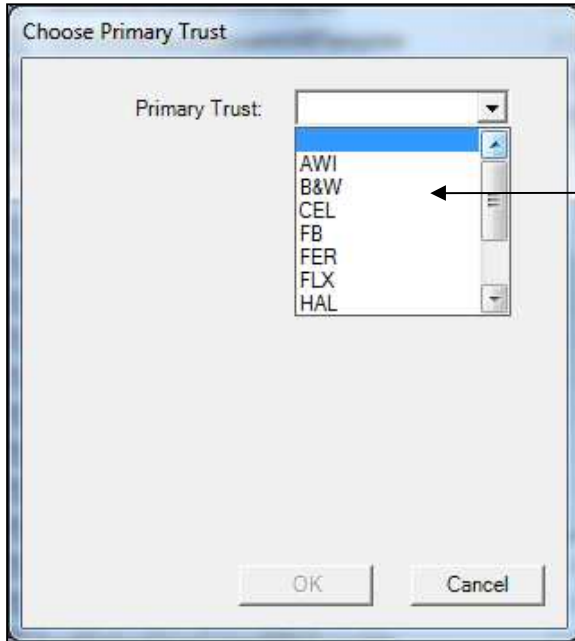
Select a "**Trust**"

Note: You may only select one Trust when downloading the "**Convert Existing Claims**" template.

4. After selecting the Trust and clicking the OK button. A "**Save BulkUpload Template**" box will appear prompting the user to save the new template. At this point the user may rename the file or leave the default name and select the directory where the new template will be stored.
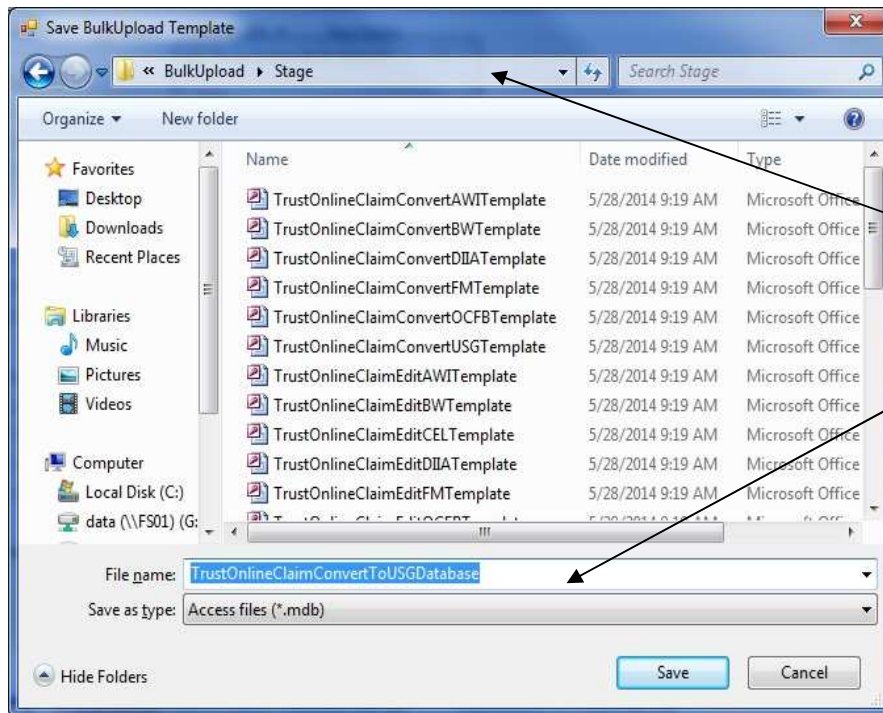
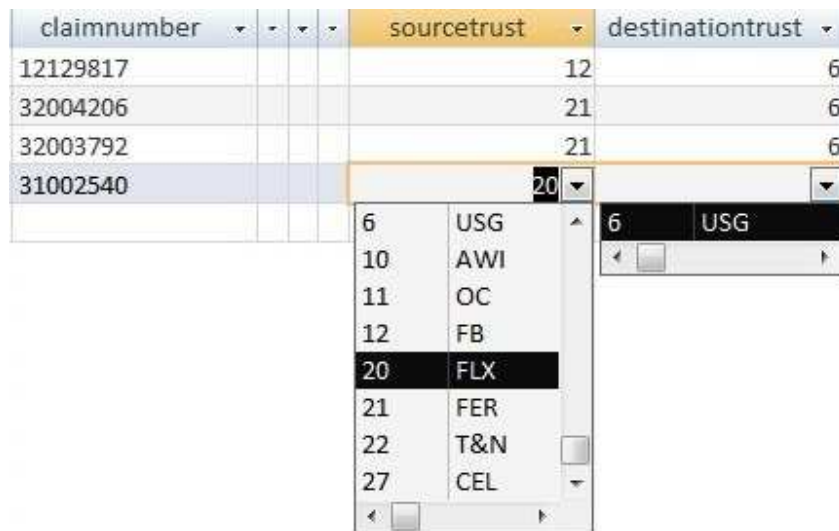Select the directory where the new template will be saved and stored.

5. After downloading the new template, double click on the file to open it. Find the tables located in the Tables view of the Access database and open the conversion table to begin entering data. The conversion table is the only table in this template that must be populated. If you have additional documents and exposures pertaining to the new claims, you may enter them in the tables provided.

Open "**conversion**" table.
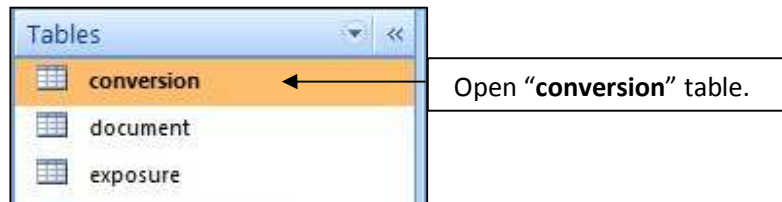
6. To convert claims, the user will need only the Source claim numbers that will be used in the conversion process. The **attorneyid**, **injuryid** and **injurydate** do not have to be entered unless the values are changing from what they were on the original source claim. For example, you may convert a non-malignant claim to a new claim and upgrade the disease to a malignancy by entering the new disease in the injuryid.

conversionid	claimnumber	attorneyid	injuryid	injurydate	sourcetrust	destinationtrust	linked
1	12129817				12	6	☐

7. The claims used as the Source claim can be any claim that the user has access too. Although any claim can be used as the source, you may only convert to one Trust at a time.

claimnumber				sourcetrust	destinationtrust
12129817				12	6
32004206				21	6
32003792				21	6
31002540				20 ▼	▼

6	USG	6	USG
10	AWI		
11	OC		
12	FB		
20	FLX		
21	FER		
22	T&N		
27	CEL		

8. After entering all of the necessary data in the conversion table, you may supplement the new claims with additional exposure and documents. As you can see, the claim numbers only appear in the '**conversionid**' once they have been entered in the conversion table.

The '**claimnumber**' field is used to link to the other table.

Notice that the '**conversionid**' drop-down in these tables correspond directly to the claim number in the conversion table.

9. After entering all of the information into the necessary tables, close the template. Log back into the Bulk Upload Tool and click on the Upload Template Button.

Click "**Upload Template**"

10. The "**Upload BulkUpload Database**" box will open, prompting the user to select the "**Convert Existing Claims**" template. After selecting the correct template, click "**Open**" to begin conversion process..

```
Converting Claims

        Total Claims Processed:     4 of 4

                   Succeeded:     4

                      Failed:     0

        Total Exposures Added:     2 of 2

                   Succeeded:     2

                      Failed:     0


     Total Documents Processed     2 of 2

                   Succeeded:     0

                      Failed:     2


                      [  OK  ]
```

11. The "**Converting Claims**" box will display the total number of claims that were successfully converted as well as the ones that failed.   The next two sections display the number of exposures and documents that were successful and the number of exposures and documents that failed.

    For the failed *exposures* and *documents*, open the template and their respective tables and check the message field which will provide a brief description of why they failed. On each of the documents table, you will see the following fields. After correcting the failed uploads, log back into the Bulk Upload tool and re-upload the conversion template with the corrections.

success ▾	message ▾
False	File <C:\Files\document\document.pdf> was not found.
False	File <C:\Files\document\document.pdf> was not found.