APPROVAL REQUESTS VALIDATION CHECKLIST (CONVERCENT)

Disclosures data and configurations from Convercent Disclosures have been migrated to *EQS Approvals*. The tables below outline key Convercent Disclosure data points and where they can be found in *EQS Approvals*.

Use the tables below to review and validate that your case data and configuration have migrated appropriately. We suggest that you choose 3-5 disclosures that are representative of your program and use them to validate. If any data points need to be discussed, make a note and present it during our next call. Please note that depending on your configuration in Convercent, you may not have all the configuration or data noted in the full list.

General Metrics

Convercent Disclosures Result Values	EQS Approvals Status Values	Where to see the Final Approval or Rejection decisions from Convercent in EQS
Pending or In Review	Pending	N/A
In Review	Pending	N/A
Cleared	Approved	History Tab
Rejected	Rejected	History Tab
Cleared or Rejected with Conditions	Requests with Attestations	History Tab
Active	Active	N/A
Inactive	Deactivated	N/A

Templates

Convercent	EQS	Validated	Issue
Disclosure Template	Does each form in *EQS Approvals* match Disclosure templates in Convercent Disclosures? Including: Text, Multi select options, conditional question logic and attachments? Approvals → Forms	☐	☐
Disclosure Template Translations	Do form translations match those in Convercent? Approvals → Forms	☐	☐

Convercent	EQS	Validated	Issue
Historical disclosure templates	Not migrated. Disclosure form submissions related to archived versions are provided in Convercent data extraction.	N/A	N/A

Notification Profiles

Convercent	EQS	Validated	Issue
Notification Profiles	EQS Approvals Rules	☐	☐

Data Points within Requests

Are Convercent Disclosures data points mapped to an appropriate data point in *EQS Approvals*?

These data points can be found in *EQS Approvals* → Requests.

Convercent	EQS	Validated	Issue
Disclosure Id	Request Id Note: The first four digits of the Convercent ID correspond to the last four digits of the EQS ID. The last two digits of the year are represented by the two digits that follow 'AM.' Example: Convercent ID: 0014aa25 → EQS ID: AM-25-00014 Additionally, if your Convercent Disclosure module has more than 9999 disclosures per year, then you will see this: Convercent ID: 0222ab25 → EQS ID: AM-25-10222	☐	☐
First & Last Name Disclosing party	Employee	☐	☐
Disclosure Status	Status – Mapping in General Metrics table above	☐	☐
Date Created	Additional details: Created Date	☐	☐
Cleared On	Request → History	☐	☐
Clearance Conditions	Attestation Status and Attestation date	☐	☐

Convercent	EQS	Validated	Issue
Attestation to Clearance Conditions	Request requires attestation	☐	☐
Outcome By Approver	Progress panel on the right side of each disclosure	☐	☐
Clearance Message to Discloser	Request → History	☐	☐
Survey Responses	Question Responses	☐	☐
Survey Response Attachments	Notes	☐	☐
Internal Team Comments, Notes, Attachments	Notes Note: Notes are only visible to admins, not employees.	☐	☐
Messages – Reporting Party	Messages	☐	☐
Tasks	Notes	☐	☐
Disclosure activity log	Not migrated.	N/A	N/A
Campaigns	Not migrated.	N/A	N/A
Campaign data, e.g. completion rates, etc.	Not migrated.	N/A	N/A

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