

APPROVALS 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 disclosure 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	Pending	N/A
In Review	Pending	N/A
Cleared	Approved	History Tab
Rejected	Rejected	History Tab
Clearance Condition = Yes	Attestation Pending / Completed	If a "Clearance Message" is associated with the attestation, that can be found in the History Tab
Attestation Completed	Attestation Completed	
Active	Active	N/A
Inactive	Deactivated	N/A

Templates

Convercent	EQS	Validated	Issue
Disclosure Template	Does each form in <i>EQS Approvals</i> match Disclosure templates in Convercent Disclosures? Including: Text, Multi select options, conditional question logic, and attachments? Configuration → Forms	<input type="checkbox"/>	<input type="checkbox"/>

Convercent	EQS	Validated	Issue
Disclosure Template Translations	Do form translations match those in Convercent? Configuration → Forms Note: We recommend focusing on EQS translations to ensure they are up to date. Your project team will train you on making revisions as needed.	<input type="checkbox"/>	<input type="checkbox"/>
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	<input type="checkbox"/>	<input type="checkbox"/>

Data Points within Disclosures

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

These data points can be found in EQS Approvals → Disclosures.

Convercent	EQS	Validated	Issue
Disclosure Id	Disclosure 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	<input type="checkbox"/>	<input type="checkbox"/>
First & Last Name Disclosing party	Employee	<input type="checkbox"/>	<input type="checkbox"/>
Disclosure Status	Status - Mapping in General Metrics table above	<input type="checkbox"/>	<input type="checkbox"/>
Date Created	Additional details: Created Date	<input type="checkbox"/>	<input type="checkbox"/>

Convercent	EQS	Validated	Issue
Cleared On	Disclosure → History	<input type="checkbox"/>	<input type="checkbox"/>
Clearance Conditions	Attestation Status and Attestation date	<input type="checkbox"/>	<input type="checkbox"/>
Attestation to Clearance Conditions	Disclosure requires attestation	<input type="checkbox"/>	<input type="checkbox"/>
Outcome By Approver	Progress panel on the right side of each disclosure Note: Approver users' names will not show up until they have a Compliance Cockpit role with Approvals module permissions.	<input type="checkbox"/>	<input type="checkbox"/>
Clearance Message to Discloser	Disclosure → History	<input type="checkbox"/>	<input type="checkbox"/>
Survey Responses	Disclosure details	<input type="checkbox"/>	<input type="checkbox"/>
Survey Response Attachments	Notes	<input type="checkbox"/>	<input type="checkbox"/>
Internal Team Comments, Notes, Attachments	Notes Note: Notes are only visible to admins, not employees.	<input type="checkbox"/>	<input type="checkbox"/>
Messages - Reporting Party	Messages	<input type="checkbox"/>	<input type="checkbox"/>
Tasks	Notes	<input type="checkbox"/>	<input type="checkbox"/>
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

Last updated: April 23, 2026