CASE AND CONFIGURATION VALIDATION CHECKLIST

All case data and configurations from your Convercent system have been migrated to your new Integrity Line. The table below outlines each Convercent Data point and where this can be found in your migrated cases and/or configuration.

Use the tables below to review and validate that your case data and configuration has been migrated appropriately. We suggest that you choose 3-5 cases that are representative of your existing cases, 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 of the configuration or data noted in the full list.

1.1.1. Case Validation

Convercent Data Point	EQS migrated Data Point	Validated	Issue
Issue ID	Each Integrity Line case was assigned a new ID. The Convercent Issue ID can be found in parenthesis next to the new assigned ID in the "Cases" tab in the column "Case ID & creation date".	☐	☐
Resolution Type	Substantiation **Note: Any cases with resolution type "Inquiry" will be migrated with a substantiation of "Other"**	☐	☐
Resolution Notes	Closure Summary	☐	☐
Customer Reference Number	If the customer reference number was present in Convercent, it can be found in parenthesis next to the new assigned ID in the "Cases" tab in the column "Case ID & creation date"	☐	☐
Issue Summary	Short Description	☐	☐
Date Opened	Created On	☐	☐
Date Closed	Closed On	☐	☐
Issue Status	Status **Note: In Review = In Progress** **If you are using a custom status, the status on the case will show as "In Progress" and the custom status will be reflected in the workflow stage at the top of the case.**	☐	☐

Issue Owner	Case Manager	☐	☐
Severity	Severity Attribute	☐	☐
Relationship to Organization	Case Tab → What is your relationship to this organization?	☐	☐
Issue Types	Primary issue type → Classification; Additional issue types see Allegation Data below	☐	☐
Involved Parties	Involved Parties Tab	☐	☐
Location	Location Attribute	☐	☐
Reported as Location (if present)	Case Tab → Please indicate where the issue occurred	☐	☐
Intake Method	Channel Call Center = Phone Web = Web Proxy = Manual Case	☐	☐
General Time Frame	Case Tab → Please indicate when the issue occurred	☐	☐
Submitted Date	Not Migrated – provided via extract This was not migrated as for most cases, the Submitted Date matched the Date Opened. If the Date Opened was backdated or changed, the original submitted date is documented in the extract provided.	☐	☐
Department	Department Attribute	☐	☐
Reported as Department (if present)	Case Tab → Please indicate if the issue being reported occurred in or is the responsibility of a specific department, division, or organizational unit	☐	☐
Intake Custom Field responses	Case tab → Questions and Responses	☐	☐
Description	Case Tab → Description	☐	☐
Related Issues	Linked Cases	☐	☐
View Activity Log	Click the three dots in the upper right hand corner of the case, select "Audit Trail"	☐	☐
Tags	Case Information Tab	☐	☐
Allowed/Denied Users per Case	Navigate to the ellipses at the top of the case and click "User Access" to view users with allowed access. **Note: Allowed/Denied access designations for each case are not being migrated from**	☐	☐

	Convercent. All active users assigned the Convercent roles "Admin," "Case Admin," and the user assigned as the case manager will have access to the migrated cases in Integrity Line. All other users will need to be explicitly granted access or granted a role that has access to the legacy case folders.		
Reporter Communications	Secure Inbox	☐	☐
Reporting Party Name	Case Tab → Contact Information	☐	☐
Reporting Party Preferred Contact Method	Not Migrated - Provided via extract	☐	☐
Reporting Party Access Number	This will not be migrated. New access credentials will be provided to the reporting party via their Convercent case. The reporter will be able to log into Convercent after migration to check the status of their case and access their new credentials.	☐	☐
Issue Types (associated to an involved party)	Involved Parties Tab → Allegations	☐	☐
Involved Parties	Involved Parties Tab	☐	☐
Role	Involved Parties Tab → Role	☐	☐
Determination	Involved Parties Tab → Determination	☐	☐
Sanction	Involved Parties Tab → Corrective Actions	☐	☐
Involved Party Custom Fields	Involved Parties Tab → Allegation Notes ***Note: These will no longer be reportable**	☐	☐
Intent	Involved Parties Tab → Allegation Notes	☐	☐
Outcome Notes	Involved Parties Tab → Allegation Notes	☐	☐
Case Cutom Fields	Case Information tab	☐	☐
Tasks	Notes Tab	☐	☐
Internal Team messages	Notes Tab	☐	☐
Attachments	Case Attachments - Case Tab → Notes Reporting Party Attachments - Secure Inbox	☐	☐
Investigations	Not Migrated – provided via extract	☐	☐
Retaliation Checks	Any messages sent to the reporting party via Retaliation checks will be migrated to the notes tab.	☐	☐

	The configuration for retaliation checks is not available in Integrity Line and has not been migrated.		
Contributing Factors	Factors associated to an issue type or person → Corrective actions. Notes about contributing factors associated at the case level → Notes Tab	☐	☐

1.1.2. *Configuration Validation*

Convercent Data Point	EQS migrated Data Point	Validated	Issue
Navigate to Data Center to validate the data points below			
User Profiles	Users are found in the Data Center. Users will be assigned a role that provides equivalent access to their Convercent permissions.	☐	☐
Locations	Attributes are found in the Data Center and Form Questions (if applicable) - If you used Locations in Convercent, these locations migrated to the "Location" attribute. If locations were surfaced on your intake page, all applicable locations are surfaced on your new EQS form also.	☐	☐
Departments	Attributes are found in the Data Center and Form Questions (if applicable) - If you used Departments in Convercent, these Departments migrated to the "Department" attribute. If departments were surfaced on your intake page, all applicable departments are surfaced on your new EQS form also.	☐	☐
Navigate to Integrity Line -> Configuration to verify the data points below			
Landing Page	Text Editor → Click the URL to navigate to the Web Intake Review Logo (top left corner) Click into each tile to confirm custom content was migrated. Click the Call Us tile to confirm phone lines if using dedicated lines. Click into Header and Footer links to verify.	☐	☐
Intake Channel	Form Bundles and Forms - We created your Intake Channel based on your Convercent intake configurations. Note: If you use Guided Intake in Convercent, survey questions tied to standard issue types are not replicated. For any custom	☐	☐

	issue types with questions, those have been recreated. If you used Geography Rules in Convercent, we created forms to reflect the applicable countries and/or regions. Additionally if you use custom intake questions these will be present on all forms.		
Terms and Conditions	Country Disclaimers	☐	☐
Geography Rules	Replicated by applying Countries to Forms in Form Settings	☐	☐
Notification Profiles	User Role settings found in the Data Center & Folders (if needed) - We replicated the Notification Profiles you had in Convercent with User Roles. You can view the custom roles within the Data Center and the view the role assigned to each user under their profile.	☐	☐
User roles have been assigned to migrated users to mirror Convercent roles & permissions:			
Admin	Default EQS Admin	☐	☐
CVT Organizational Admin	EQS Organizational Admin	☐	☐
CVT Issues and Questions Admin	EQS Case Admin	☐	☐
CVT Issues and Questions Moderator	EQS Case Moderator	☐	☐
Issue Types	Classifications and Allegation Types All active issue types or issue types associated to legacy cases will be migrated, while any applicable issue types from Convercent will be reflected in the intake forms.	☐	☐
Sanctions	Allegations - Corrective Actions and Conclusions Sanctions are migrated into both fields to support either of two recommended use cases for managing allegations.	☐	☐
Contributing Factors	Allegations - Contributing Factors	☐	☐

Custom Issue Status	Workflow - If you used Custom Issue Status, in Convercent, these have been migrated as steps within a workflow .	☐	☐
Resolution Type	Substantiation	☐	☐
Escalation Rules	Case Screening	☐	☐
Case Custom fields	Case Tabs	☐	☐
Issue Required Fields	Case Tabs **Note: Department, Involved Party, Issue Owner, Issue Type, and Issue Summary fields are system attributes, therefore could not be recreated as required. If additional required fields were recreated in a new case tab, they have been marked as required.**	☐	☐
Case Management Message Board Templates	Message Templates All message templates from Convercent were recreated in EQS as "Message to a reporter" templates. If you used message templates for internal notes in Convercent, flag with your consultant to discuss EQS functionality.	☐	☐
Automated Response to Reporter	General Settings - Auto-Reply when a Report is Submitted	☐	☐