

## Job Aid: Copy Claim Office Profile

Purpose	This job aid describes the multiple ways to duplicate a Claim Office Profile. Use the following steps to duplicate a Claim Office Profile.		
Copy Claim Office Profile			
	Step	Action	
	1	Go <b>to Configure &gt; Profiles</b> . The Profiles screen displays.	
Search Results		Tipl You can use the	
🛅 New Profile 🖉 Refre	esh 🛛 🛅 Bulk Copy	Copy link instead!	
h	Name	Company Code City	
Nata: This series all	PANY 7 - CLAIM (	DFFICE TIN7 Claim Office Chin 2	
rates and settings	NY 7 -	TIN7 Claim Office	
except for Company	2 Select <b>New Profile</b> . The New Profile screen opens.		
information so that	New Prof		
you can copy from	I ISW PTO		
Company to another.		New Profile	
	<u> </u>	Please enter the details for the new claim office profile.	
	Company	Information	
	Insurance	Company: EDRP TEST COMPANY 4	
	Office Cod		
		5 🔽 Copy data from existing profile	
	Copy From:		
		EDRP TEST COMPANY 4 - edrp - us	
		V OK Cancel	
	3	Enter the Insurance Company name or select from droplist.	
	4	Enter the office code in the Office Code field	
	5	Click in the checkbox to select the <b>Copy data from existing</b>	
		profile. The Claim Office field becomes available.	
	6	Select the Claim Office Profile whose data you want to copy.	
	7	Click <b>OK</b> . The Claim Office Profile screen displays with the data	
		copied over from the other Profile.	
	8	Update the data as needed for the new Claim Office Profile.	
	9	Click Save or Save and Close when finished.	

Continued on next page



One. True. Partner.

## Job Aid: Copy Claim Office Profile, Continued

**Bulk Copy** You can also bulk copy a Claim Office Profile to other locations instead of remaking the Profile at each location.

Step	Action			
1	Go to Configure > Profiles.	Search Results		
	The Profiles screen displays.	👘 New Profile  🕃 Refresh 👘 Bulk Copy		
		Name <sup>VS</sup>		
		EDRP TEST INS COMPANY 7		
2				
2	Select Bulk Copy. The Bulk Copy screen	opens.		
Bulk Copy	Profile	$\mathbf{X}$		
	Bully Comy			
	Select the insurance company and claim office from which	to bulk copy profiles		
	from.			
Company I	nformation			
Insurance (	Company: EDRP TEST COMPANY 4	<b>3</b>		
Claim Office	EDRP TEST COMPANY 4 - edrp - us	Note: This copies all		
of 4	GF5432	rates and data including		
		Company information to		
Copy to Lo	cations			
Availat	le Locations:			
aQA C	ERRITOS MSO LOC 2 OA CERRITOS MSO LOC 3			
	<u>ب</u>			
		6		
		6 V OK Cancel		
3	Select the <b>Insurance Company</b> from the	6 Cancel droplist		
34	Select the <b>Insurance Company</b> from the Select the <b>Claim Office</b> to copy from the	droplist.		
3 4 5	Select the <b>Insurance Company</b> from the Select the <b>Claim Office</b> to copy from the Choose <b>Locations</b> to send the bulk Claim	droplist. Office copies from the		
3 4 5	Select the <b>Insurance Company</b> from the Select the <b>Claim Office</b> to copy from the Choose <b>Locations</b> to send the bulk Claim Available Locations and move them to Se	droplist. droplist 0 Office copies from the elected Locations using		
3 4 5	Select the <b>Insurance Company</b> from the Select the <b>Claim Office</b> to copy from the Choose <b>Locations</b> to send the bulk Claim Available Locations and move them to Se the arrow keys.	droplist. droplist 0 Office copies from the elected Locations using		
3 4 5 6	Select the <b>Insurance Company</b> from the Select the <b>Claim Office</b> to copy from the Choose <b>Locations</b> to send the bulk Claim Available Locations and move them to Se the arrow keys. Click <b>OK</b> . Those profiles now appear for	6 ✓ 0K @ Cancel droplist. droplist a Office copies from the elected Locations using r the selected Locations		