

Job Aid: Copy Claim Office Profile

Purpose This job aid describes the multiple ways to duplicate a Claim Office Profile.

Copy Claim Office Profile Use the following steps to duplicate a Claim Office Profile.

Step	Action
1	Go to Configure > Profiles . The Profiles screen displays.



Note: This copies all rates and settings except for Company information so that you can copy from one Insurance Company to another.

2	Select New Profile . The New Profile screen opens.
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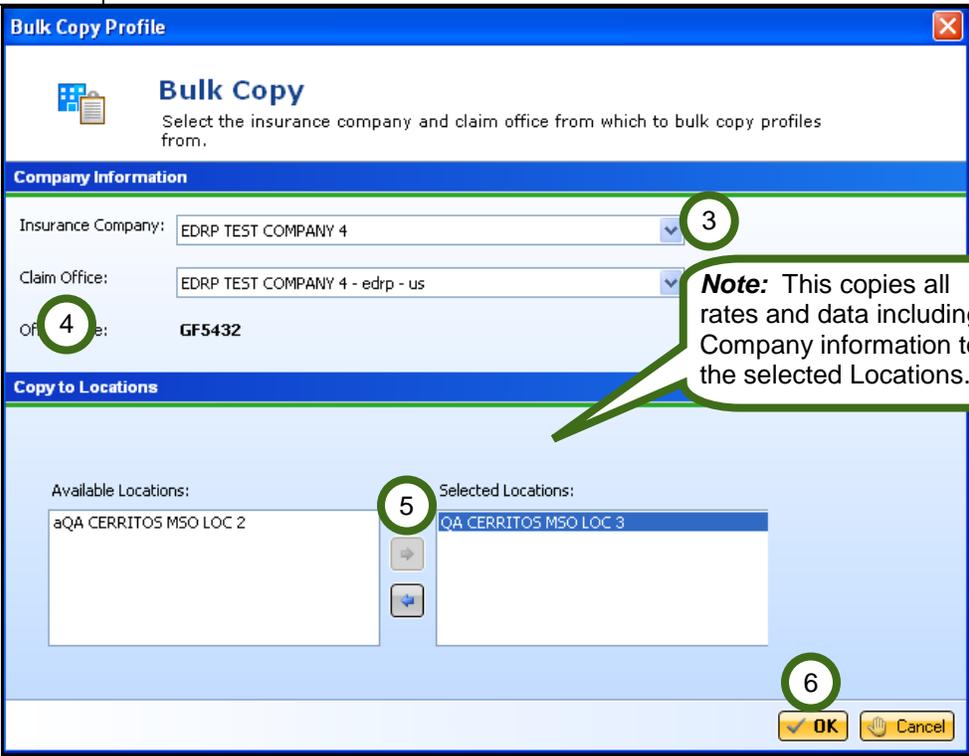
3	Enter the Insurance Company name or select from droplist.
4	Enter the office code in the Office Code field
5	Click in the checkbox to select the Copy data from existing profile . The Claim Office field becomes available.
6	Select the Claim Office Profile whose data you want to copy.
7	Click OK . The 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.

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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 . The Profiles screen displays. 
2	Select Bulk Copy . The Bulk Copy screen opens. 
3	Select the Insurance Company from the droplist.
4	Select the Claim Office to copy from the droplist
5	Choose Locations to send the bulk Claim Office copies from the Available Locations and move them to Selected Locations using the arrow keys.
6	Click OK . Those profiles now appear for the selected Locations for you to update or change as needed.