

Essentially the steps for usage are:

1. Upload/Manage Files > Upload a file
 - a. You will upload a copy of your UDS C and D records. The preferred method is to use the UDS text file, but you may also use a CSV export as long as it contains the same fields in the same order as UDS.
 - b. C Record: We prefer a "roll up" which combines all your C Records for the year into one per NAIC, Coverage, etc.
 - c. D Record: We only need the final YTD D Record. (Typically dated 12/31.)
2. Load UDS Records
 - a. Click "Choose or add a different file" to select the file you just uploaded, if it is not automatically there.
 - b. Use the dropdowns to select the options that match your file.
 - c. Click the Test UDS button. It will confirm if the options you select match your file and allow you to Submit the file for processing. If there are no errors, please do.
3. You can then check the processing job status under Job Errors > C/D Record Job Errors. It will display a yellow box while the job is still running, or a green or red one when finished.
 - a. Red indicates that some lines did not process, and will give you the option to download a file of only the problematic lines. (Lines not included in this errors file were loaded successfully and do not need to be resubmitted.)
 - b. If you can, fix the problems in the error lines and feed that file back in through the Load UDS Records steps.
 - c. If you need help fixing the errors, you can reach out to support@guarantysupportinc.com and we will examine the issues.
4. Once all lines from the file have been processed, you're all set! You can examine a summary of your records in View My Records in the top navigation.

Some states use reconciliation and expense breakdown forms, which you can access and fill out (per year) under the Templates navigation menu.