

Download These Files First

Note: You may **skip** this step if you **do not** plan to **import** your data into a spreadsheet such as Microsoft Excel.

You will need these “column header templates” from the L&I website to utilize your electronic Retro report(s) effectively. The “templates” are available on our [Retro Resources](#) web page:

<http://www.Lni.wa.gov/ClaimsIns/Insurance/Reduce/Qualify/Resources/> (or) <https://go.USA.gov/xQqXn>

The screenshot shows the website's navigation menu with 'Claims & Insurance' selected. The breadcrumb trail is: Home > Claims & Insurance > Insurance for Business > Reducing Rates > Qualify for Refunds with Retro > Retro Resources. The main content area is titled 'Retro Resources' and lists several resources. A red arrow points to the first file under the 'Resources available for electronic report users' section: 'Column headers template and data element definitions for the adjustment report (618 KB PDF)'. Other files listed include templates for monthly, quarterly, and master reports, as well as PDF guides for downloading and formatting reports.

There are five (5) files to choose from, depending on the report you are working with:

1. Column headers template and data element definitions for the **adjustment** report.
2. Column headers template for the **monthly** report.
3. Column headers template for the **Early Case Reserve monthly** report*
4. Column headers template for the **Early Case Reserve quarterly** report*

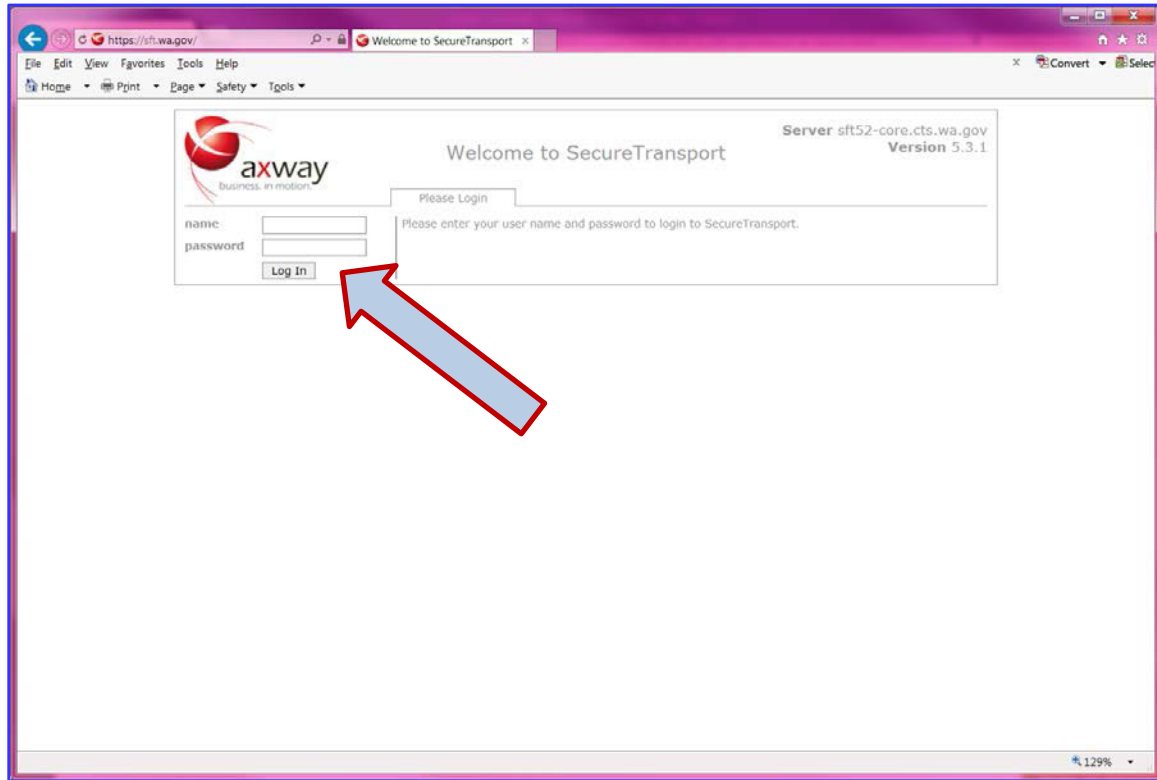
*Note: these are “parallel” reports that are currently being provided as a comparison tool. In the near future, L&I will likely move away from human reserving of claims and these early case reserves (ECR) will be applied.

5. Column headers master template for **quarterly report** and data files (includes data element definitions for factors & premium report).

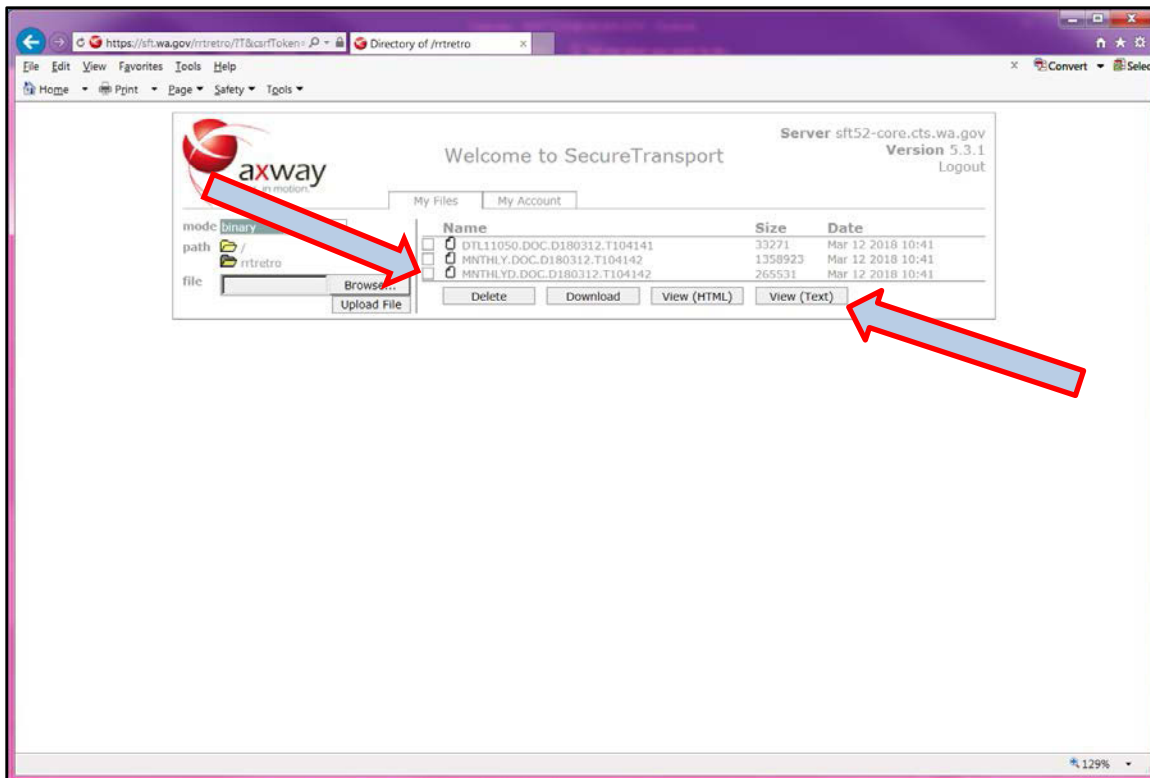
For ease of use, we suggest you save the column header template file(s) to your computer's **Desktop** (or other location of your choice) using the file name(s) given.

Log into the SFT Secure Server

Next, log into the SFT (*secure file transfer*) Server at <https://sft.wa.gov/>, and enter your **username** and **password**.

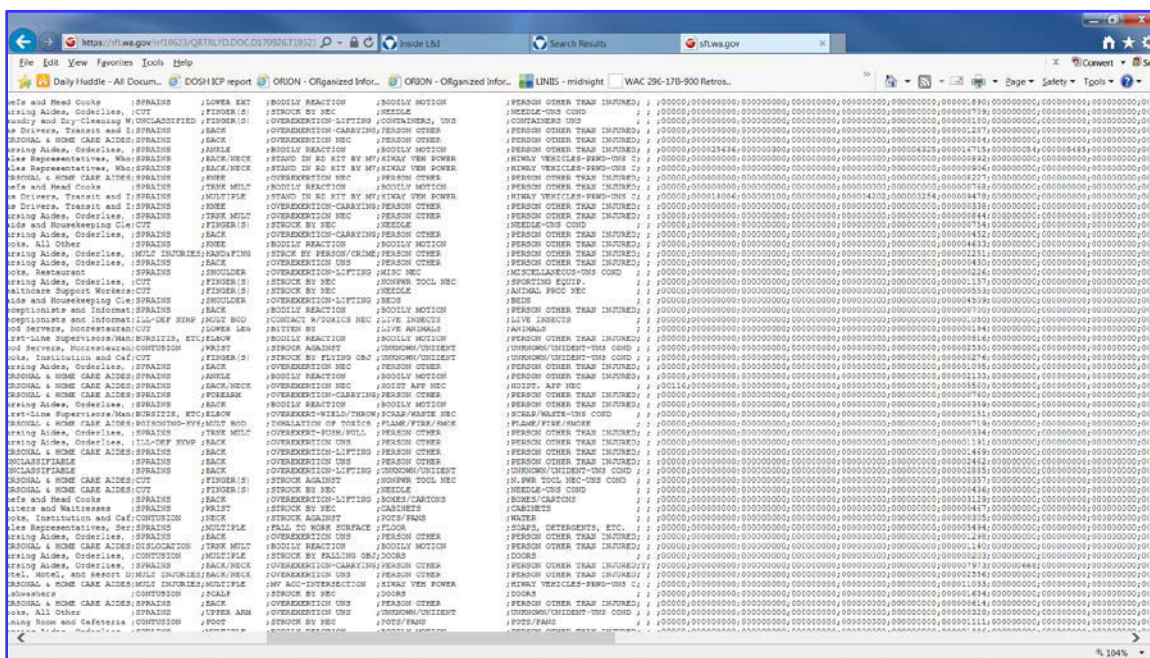


*Because of differences in web browsers and operating systems, what you see on your computer **may vary slightly** from these illustrations.*



In order to import your report data into Excel, you will need to select the appropriate **data file** (such as MONTHLY.DOC). Any report without a 'D' in the name (like MONTHLY.DOC) is intended for printing/viewing only, and **not** for manipulation via spreadsheet. This holds true for your quarterly and adjustment report(s), as well.

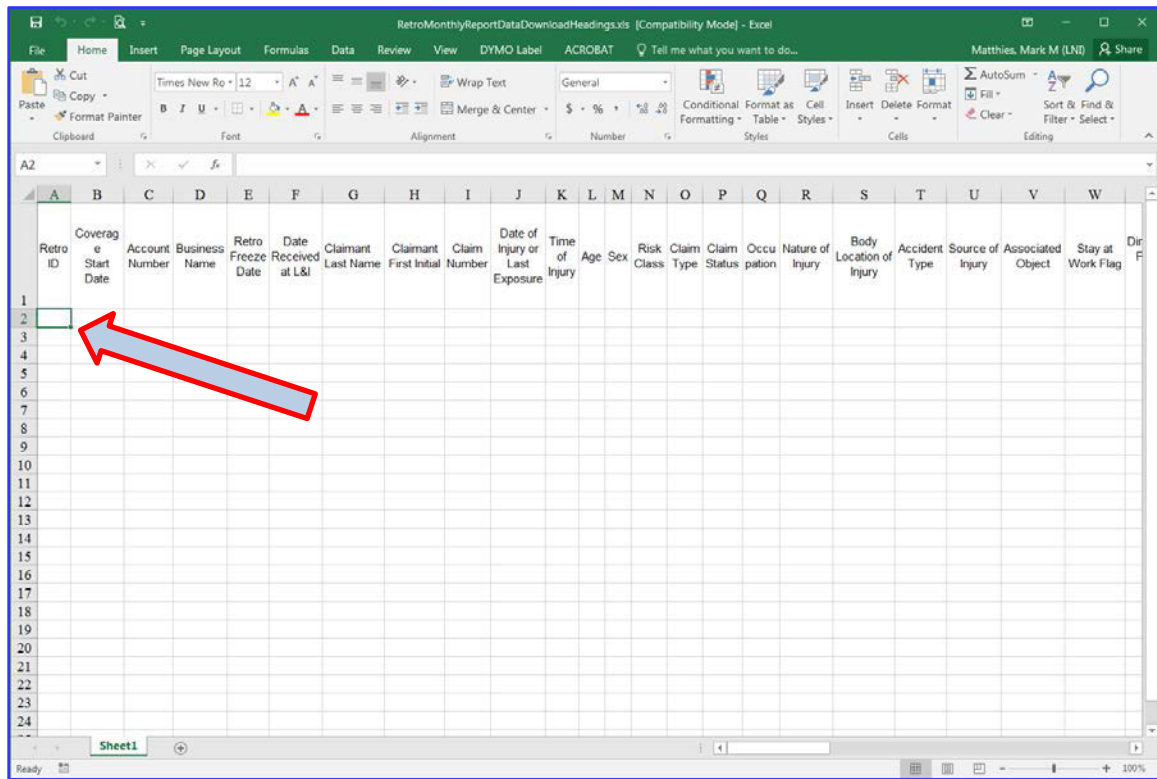
Choose your file by **checking the box** next to the report name and clicking on the **View (Text)** button (see above). Your data will then be displayed **within** your web browser window (*illustrated below*).



Type **CTRL+A** on your keyboard (or use the Edit Menu command "Select All"), followed by **CTRL+C** ("Copy").

Open the relevant column header template

Open the (previously downloaded) *column header template* file for the report you want to work with. For example, if you are importing **monthly** report data (labeled as **MNTHLYD.DOC.D180312.T104142** in the *above example*), open the file you downloaded called **RetroMonthlyReportDataDownloadHeadings.xls**:



Make sure that cell **A2** is selected; then, use the Edit Menu and choose **"Paste"** (or type **CTRL+V**). The data from your web browser should now appear in your Excel program.

Next, click on **Data** in the Excel 'ribbon' and:

- select **Text to Columns**,
- then **Delimited**,
- then click **(Next)**,
- **Unselect Tab** and
- choose **Semicolon**,
- then click **(Finish)**.

Congratulations! You have now imported your data into Excel for further study and review.

Thinking Ahead

Make sure you **"Save As..."** with a unique (and memorable) file name. This should preserve the original *column headers template* in its original state for future use.

Repeat these steps for each data file type that you wish to export to Excel. With practice comes speed.

Please send email to Retro@Lni.wa.gov (or call **360-902-4851**) with any questions, comments, or concerns.