

Release Update – November 25

Data Management Solutions is pleased to announce this week's enhancements and fixes to our application. Each enhancement/fix is separated by Applicable Users (subscribers who are directly affected by the enhancement or the fix) for easier viewing.

New + Improved

Applicable users: Agency and Organization Users

New Module: Eligibility Management Tracking

We have introduced a new module called Eligibility Management Tracking, designed to streamline and record all manual enrollment handling activities. This module supports tracking for both recurring eligibility management and open enrollment (OE) manual processing.

The Eligibility Management Tracking module captures when enrollment changes are handled manually outside of automated integrations. To ensure complete visibility, users can log the method of processing, timeframes, assigned staff, and relevant enrollment counts.

Creating a new eligibility management tracking task is only available to General Agents and may be added at the Organization and Company level.

The Eligibility Management reporting which supports filtering and exporting is available:

1. At the Agency level
2. At the Organization level
3. At the Company level under each carrier

Available Fields

This module includes the following fields:

- **Company** (Required)
- **Carrier** (Required)
- **Eligibility Management Task Type** (Required)
- **Name** (Required)
- **Assignee** (Required)
- **Change From Date** (Required)
- **Change To Date** (Required)
- **Processing Type**
- **Changed Enrollment Count**
- **Verified Enrollment Count**

- **Demographic Changes Count**
- **Processing Submitted Date**
- **Process Confirmed Date**
- **Upload File** (optional attachment capability)
- **Notes**

Tasks may also be **saved and resumed later**. However, once a task is marked **Saved & Completed**, it becomes **locked** and can no longer be edited.

New Agency User Role added

We've have introduced a new agency-level user role called **Agency Task Comparer**. This role retains the same **compare access** available to an Agency Admin User, while providing more controlled permissions where needed.

Key Capabilities

- **Access to the new Eligibility Management Tracking module**
- **View-only access to Renewals and Carriers**
- Can be assigned as **GA Eligibility** and **GA Audit Contacts** on both **Carriers** and **Plans**
- Can be **whitelisted to specific organizations** for controlled access
- Maintains the ability to perform **comparison tasks** consistent with Agency Admin User functionality

The Agency Task Comparer role was created to provide agencies with a more controlled, permission-specific user type at an Agency level that supports operational needs without granting full administrative access. Many agencies require team members who can review, compare, and track eligibility or audit tasks, but do not need the broader system permissions that come with the Agency Admin role.

Updated Naming Convention for Eligibility Management Dropdown on the Carrier and Plans

We updated the Eligibility Management dropdown on both **Carriers** and **Plans** to ensure clearer and more accurate labeling across GA-licensed environments.

What Changed

- The previous prefix "**BBS**" has been replaced with "**Agency.**"
When a General Agent (GA) licenses the system, the old naming convention did not clearly indicate that the GA—not BBS—is managing Eligibility. Updating the prefix ensures accurate representation across all environments.

- We have also updated terminology from “Carrier Key” to “Manual Eligibility.” This provides clearer wording that better reflects the purpose of the task—tracking manually handled eligibility processes rather than carrier file keys.

These updates create consistent, GA-appropriate language and improve clarity for users managing eligibility tasks within the system.

Enhanced Agency-Level Administrator

We’ve enhanced Agency-level access to allow one Agency-level administrator connection other than Broker Builder Solutions. Only a single administrator connection is permitted.

This update supports licensing scenarios where Broker Builder Solutions is not the administering agency, ensuring proper access and control for GA-managed organizations.

Updated Renewal Email Subject Line and Signature

We’ve updated the renewal email configuration to better support GA-licensed environments:

- The default sender is now the assigned Agency Administrator.
 - If no administrator exists, the sender defaults to “Agency.”
- The email subject line has been updated to use the GA name as the prefix, instead of “BBS,” ensuring accuracy when BBS is not the GA.
- The email signature now also reflects the GA name.

Enhanced Renewal Comments: Email Copy Support

Renewal comments in the wizard now support copying and pasting full email content (excluding images), including attributes such as From, Sent, To, and Subject.

This update makes it easier to document email communications directly within the renewal process. Many renewal decisions and confirmations occur via email, and previously, users could not paste the full email header details into the comments. Adding this capability ensures:

- **Accurate recordkeeping** of important communications
- **Improved auditability** by capturing sender, timestamps, and recipients
- **Better context** for anyone reviewing the renewal history later

Overall, it strengthens documentation quality and supports clearer communication trails within renewals.

Enhanced Company Table at the Organization Level

We've added a new "In Renewal" column to the Company table on the Organization page. This column displays a check mark for any company with an active renewal in progress, providing quick visibility into renewal activity.

This enhancement provides administrators with quick, at-a-glance insight into which companies currently have renewals in progress. By surfacing this information directly in the Company table, users can more easily monitor renewal activity, prioritize work, and navigate to active renewals without needing to open each company individually.

Updated Import Functionality

We've enhanced the import process for Company, Carrier, and Plan records to prevent blank values in an import file from overwriting existing data.

- Blank fields in the import will no longer replace populated values.
- To clear a value, the field must be updated manually.
- To add or change a value, include a non-blank value in the import file and the system will update it accordingly.

Why This Change?

This update improves data protection and import accuracy. Previously, blank values could unintentionally overwrite valid data, leading to data loss and cleanup work. By preventing blank-to-blank overwrites, the system now:

- Protects existing data from accidental deletion
- Preserves data integrity during bulk updates
- Reduces user errors and unexpected changes
- Ensures only intentional, non-blank updates are applied

This creates a safer, more predictable import experience for all users.



Reminder: Carrier, Carrier Plans, and ALL associated modules Availability

Please note that Carriers and Carrier Plans as well as our new Renewal and Eligibility Management Tracking Modules are only available to organizations on the Platinum Elite and Subscription-Based Plans.

If you're interested in upgrading your current subscription, please contact our Business Development Team at sales@brokerbuildersolutions.com or complete the online form here:



[DVP Platinum Elite Subscription Form - DMS Data Validate](#)
