

Release Update – January 5th

Streamline (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: All Users

Product Rebrand Announcement

What's Changing:

We're excited to announce that Data Management Solutions – Data Validation Platform is now branded as Streamline, powered by Data Management Solutions.

New website address: <https://streamlinebydms.com>

As part of this rebrand, the application is now organized into clearly defined solution areas that reflect how teams use the platform.

Streamline Solution Areas:

- Streamline Data -
Designed for auditing and data validation, Streamline Data supports carrier audits, invoice reviews, eligibility comparisons, and discrepancy verification. This is the evolution of the original Data Validation Platform and remains the core solution for ensuring data accuracy and compliance.
- Streamline BenOps -
Streamline BenOps focuses on benefits administration operations and task management, providing visibility and tracking for renewals, eligibility management tasks, carrier file processing, and operational workflows handled outside of automated integrations.
- Streamline Quoting (In Development) -
Streamline Quoting is currently under development and will support quoting and pre-implementation workflows, further expanding the platform's ability to manage benefit data throughout the full lifecycle.

Why We're Making This Change:

As the platform has expanded beyond validation alone, the previous name no longer reflected the full scope or day-to-day experience of the product. The Streamline brand better represents how the platform is used—helping teams work more efficiently by simplifying audits, task management, renewals, eligibility processing, and data workflows.

- Streamline highlights the outcome users experience: faster processes, fewer manual steps, and clearer workflows
- Powered by Data Management Solutions preserves the trust, data expertise, and reliability behind the platform

This update allows the product name to clearly communicate value while supporting continued expansion of features and functionality.

What's Not Changing:

- No changes to data, or security
- No changes to how you use the application
- The same Data Management Solutions team, support, and standards you rely on

What This Means for You:

You'll begin seeing the Streamline name and product areas reflected throughout the application, documentation, training materials, and communications. All existing workflows, permissions, and integrations remain exactly the same.

This rebrand ensures the product structure and name match the experience—simplifying complex data and benefits operations while continuing to be backed by the trusted foundation of Data Management Solutions.

Enhanced Mapping Functionality

We've significantly improved our mapping functionality to make the audit mapping process faster, more intuitive, and far more efficient.

Our first improvement is **advanced mapping search**. Previously, typing a letter in the dropdown would only jump to the first matching entry that begins with that letter. Now, you can search for *any* character or string of characters, and the system will return all matching values anywhere within the mapping name.

Example: Searching "gen" will return every entry containing "gen," regardless of its position in the name.

This greatly reduces the time needed to locate existing mapping values.

Our second enhancement is **copying existing mappings**. Users can now duplicate a mapping, rename it, and add, change, or remove mapping values as needed. This is particularly helpful when plan-year values change but the core plan remains the same. For example, if a medical plan is identical to last year except for the plan year, you can simply copy the previous mapping and update that one field—instead of rebuilding it from scratch.

The final enhancement is **importing mapping values**. This eliminates the need to manually key or copy/paste each value into the system, reducing both time and errors. The import requires only a single Excel file with two columns: Source Value and Target Value. The application will automatically read the first column as the Source and the second as the Target, regardless of the column header names.

Updated Subscription Level

We've expanded the DVP Base 3–6 subscription level to support **1 to 100 user seats**, providing greater flexibility for organizations of all sizes. As part of our rebranding and to better reflect the broad functionality the application now offers, this subscription has also been renamed to **"Data."**

Added additional Discrepancy Types

We've added two new discrepancy types to the audit verification process: **Global Issue** and **SSN Mismatch**. These additions provide greater clarity and accuracy when reviewing and categorizing audit discrepancies.

Request Support Option

We've introduced a **Request Support** option on **Step 5 – Compare** for audits that return **more than 30 discrepancies and/or missing items**. This option appears only when that threshold is met.

The purpose of the Request Support option is to provide quick, easy access to assistance when an audit produces a high volume of results. It allows users to flag the audit for additional review and support, helping prevent teams from feeling overwhelmed and ensuring issues are addressed efficiently.

Please note, the **Streamline Support Team** is always available—regardless of audit results. If you need assistance at any time, you can reach us at support@dms-datavalidate.com.

Enhanced Rounding (Variance) Functionality added

We've introduced new optional rounding (variance) functionality to allow users to exclude a defined range of discrepancies when using the **Minus** computation method. This enhancement was added to account for scenarios where numeric values are calculated in one or both import files.

Common examples include situations where a benefits administration system combines **Life and AD&D** amounts while the carrier file lists them separately, requiring the values to be added together for comparison. Another example is when a **bi-weekly deduction** is converted to a **monthly amount** to align with a carrier invoice.

This enhancement helps minimize false discrepancies caused by calculation differences and provides more accurate, meaningful audit results.

New Processing Type Added to Eligibility Management Tasks

We've added a new processing type called **Error Report** to the **Eligibility Management Task** module to help track **error reports received from carriers** as a result of submitted files.

This processing type includes a **different set of fields** tailored to capturing carrier-reported errors, allowing teams to accurately document the issue, track carrier feedback, and monitor resolution progress related to file processing errors.

In addition, we've expanded the availability of the **Eligibility Management Task** module. Tasks can now be created for **any applicable carrier and/or plan** that has any eligibility type populated (not blank).

Previously, task creation was restricted to specific eligibility management types. With this update, **all three Eligibility Management Task types are now available regardless of the eligibility management type**, providing greater flexibility and more consistent tracking across carriers and plans.



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 Streamline BenOps.



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If you're interested in upgrading your current subscription, please contact our Business Development Team at sales@brokerbuildersolutions.com.
