

Release Update – February 18th

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

AI-Assisted Data Point Matching

We are now leveraging artificial intelligence during Step 2 of the audit process to assist with matching data points. The AI Auto-Match feature reviews column names and automatically aligns them with the data points it determines to be the best match.

An AI Auto-Match icon will appear next to any fields matched using AI, allowing for quick identification.

While AI significantly improves efficiency, it is not 100% accurate. As a best practice, we recommend reviewing and confirming all AI-generated matches before proceeding to ensure accuracy.

Carrier Conversion Enhancements

We have expanded our list of supported carrier conversions to include the Mutual of Omaha row-based invoice. Previously, this invoice required extensive manual manipulation, which increased processing time and the potential for manual errors. The file can now be converted into a column-based report that closely mirrors the **Carrier Billing by Plan** report in EN, improving efficiency and accuracy.

We also updated the Guardian conversion to recognize the newly added invoice fields for Billing Period and Billing Due Date. Because these fields are not typically used during audits, they are excluded from the converted output.

Applicable users: Agency Users

Eligibility Management Commenting Enhancements

We have enhanced the Eligibility Management module to support task comments, improving communication and documentation within workflows. Comments are included in email notifications sent to the task assignee, helping ensure important updates are not missed.

The Notes section has been renamed to Supplemental Information to better reflect its purpose. This section is intended for storing task-related details and may be updated or overwritten as needed. In contrast, the Comments section is designed for communication. Comments capture the submitting user and timestamp and are locked once submitted.

Comments can also be designated as General Agent-only making them visible exclusively to the General Agent.

These changes were implemented to improve communication clarity, usability, and accountability within Streamline BenOps workflows.

Renewal Wizard Enhancements

We have enhanced the Renewal Wizard by adding **Close** and **Delete** options to the **Client Information** step. The **Close** option is intended for renewals marked as *Broker Managed*, allowing the agent to close the renewal without completing the remaining steps and avoiding the additional email communications triggered in later stages. When a renewal is closed, it will appear in the renewal list with a **Closed** status rather than the standard Completed status. Only agency users have permission to close a renewal, and once closed, it cannot be reopened.

If a renewal was created in error, it may be **deleted after it has been closed**. Deleting a renewal permanently removes it from the carrier page renewal list and it cannot be retrieved.

Within the Renewal Wizard, the comments section has been relocated to the bottom of the page for improved usability. Comments can also now be designated as **General Agent-only**, making them visible exclusively to the General Agent.

Carrier Termination Flow-Down Enhancement

Additional functionality has been introduced to automatically inactivate associated plans when a carrier is turned off. Previously, plans under a carrier had to be manually deactivated after the carrier was terminated. With this enhancement, once a carrier is termed, the deactivation will automatically flow down to all related plans, improving efficiency and reducing the risk of oversight.

Eligibility Management Task Module – OE Processing Type Update

We have removed the required field validation for Changes From Date and Changes To Date when using the Open Enrollment (OE) Processing Type within the Eligibility Management Task Module. While these fields remain available and may still be completed when applicable, they are no longer required in order to save or close a task.

This change reduces the time needed to complete OE-related tasks and streamlines the workflow during high-volume processing periods.

Expanded Carriers, Benefit Types, and Benefit Administration Systems Options

We continue to expand the carriers and benefit types supported within the application, as well as the Benefit Administration Systems available for selection. With this release, additional carriers, benefit types, and Benefit Administration Systems have been added to the available dropdown lists, providing greater flexibility and support for a wider range of client and system configurations.

Carriers	Benefit Types	Benefit Admin Systems
	Health & Wellness	
BBP Admin	Perks	Paycom
Ameriflex	Pet Care Discount	UKG Ready
AmFirst Insurance Company		UKG Pro
Assured Benefits Administrators		
BASIC		
Boston Mutual Life Insurance		

Imagine360
INOVA
Legal Resources
Optum
PetPartners
Pinnacle Financial Partners
Point 32Health
Reuro Health (formerly Competitive Health)
Sentara Health
The Standard - AHL
Tres Health (formerly IHPlans)
UPMC

Fixes

Applicable users: *Agency Users*

Task Completion

We have corrected an issue that prevented open tasks from being completed if the carrier associated with the task had been inactivated. With this fix, tasks that are already in progress can now be completed as expected, even if the carrier has been turned off.

Fix for Agency User Creation of Organization Users

We have corrected an issue that caused an error when an agency user attempted to create an organization user. Agency users can now successfully add organization users without encountering an application error.



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.

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