

Company User Guide



Powered by

DATA MANAGEMENT SOLUTIONS

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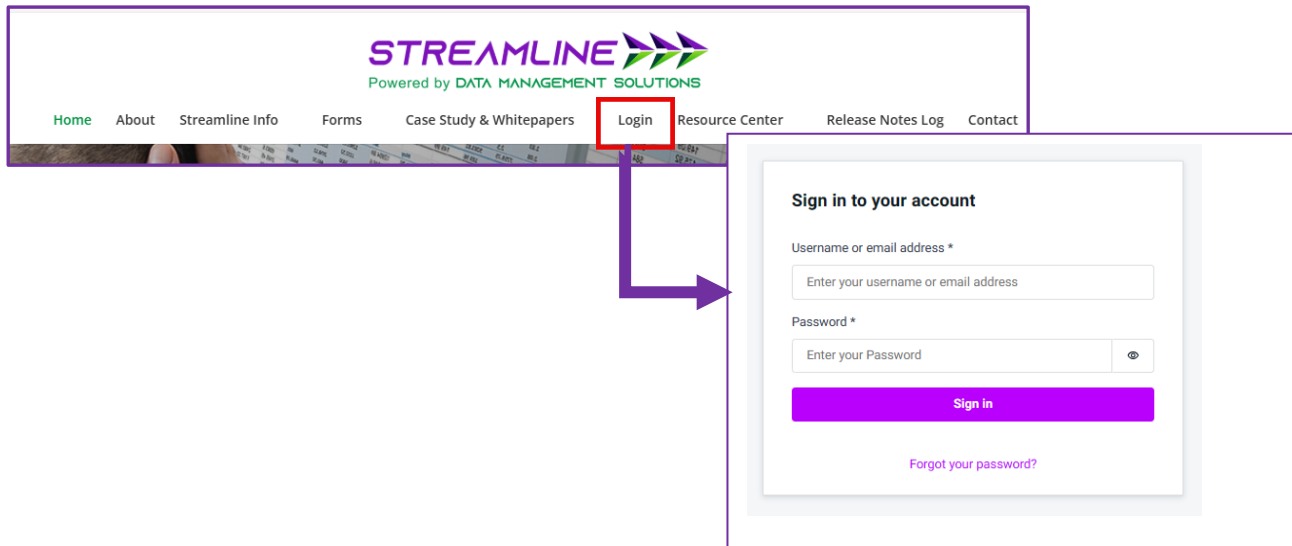
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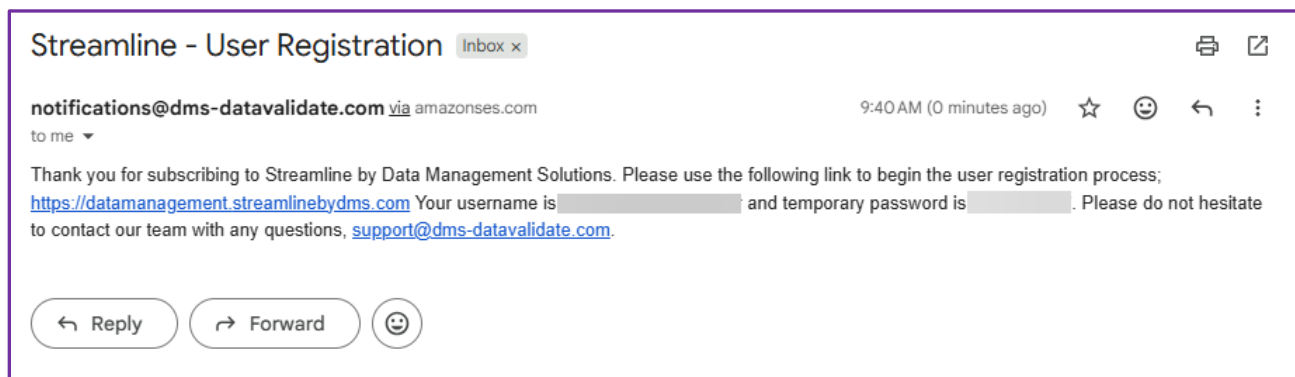
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Login

The Streamline application can be accessed from <https://streamlinebydms.com/> using supplied username or registered email address. A temporary password is provided in the registration email and requires an update during the registration process.



Registration Email Example:



Users

The Streamline application supports six (8) user types, each with varying levels of access and functionality:

1. **Agency User – Full Access**

Provides complete access to all features within the application, including the ability to add and deactivate users. Please note that currently only Streamline support staff have the ability to add Agency users.

2. **Agency Task Comparer – Limited Access**

Allows full compare and merge functionality, but only for designated (whitelisted) organizations. This role has access to the Eligibility Management Tracking Module but with view only access to the Renewals and Carriers.

*** Please note that currently only Streamline support staff have the ability to add Agency users.

3. **Organization Admin – Full Access**

Provides complete access to all features within the application, including the ability to add and deactivate users.

4. **Organization Comparer – Limited Access**

Allows full compare and merge functionality, but only for designated (whitelisted) companies. This role does not have the ability to add new companies.

5. **Organization Task Manager – Limited Access**

Grants the same permissions as the Organization-Level Comparer, excluding access to compare and merge functions.

Note: This user type does not count against your licensed user seats. You may create an unlimited number of Task Managers.

6. **Organization Verifier – Partial Access**

Permits verification of discrepancies and missing data for existing compares. Compare and merge functionality is not available for this role.

Note: This user type does not count against your licensed user seats. You may create an unlimited number of Organization Verifiers.

7. **Company-Level Admin – Limited Access (Platinum Elite Plan only)**

Offers full compare and merge capabilities, but only for the specific company under which the user is created. This role is exclusive to the Platinum Elite subscription.

8. **Company-Level Verifier – Partial Access**

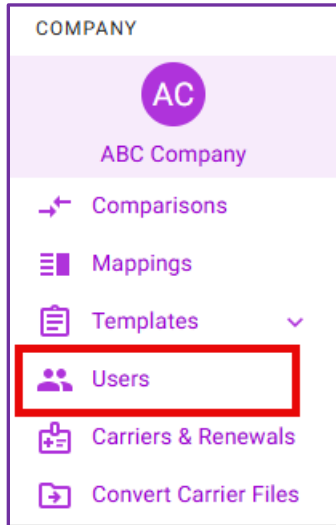
Allows verification of discrepancies and missing data for existing compares within a single company. This role does not include compare and merge functionality.

Note: This user type does not count against your licensed user seats. You may create an unlimited number of Company Verifiers.

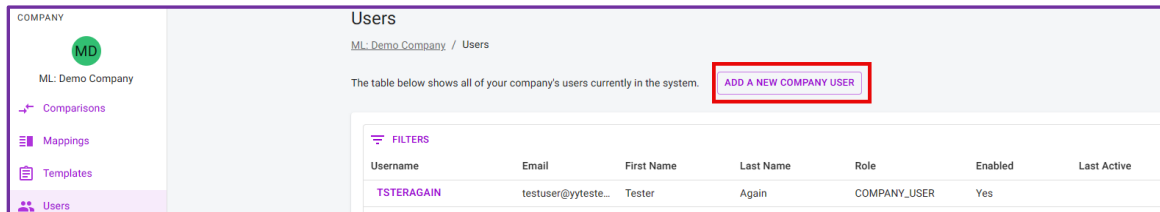
Only Company level users are discussed in this set of instructions. Please reference the Agency or Organization Level User process document for information pertaining to that level.

Adding a Company Level Verifier user

Select Users in the left menu bar.



Select ADD A NEW COMPANY USER.



Enter all applicable information for the newly created user. Company admin users are restricted to creating company level verifiers only. The verifier access is limited to verifying discrepancies and missing data for existing compares only. No compare and merge functionality exists for this level.

New User

Email Address

Username

First Name

Last Name

Phone

Job Title

Billing Contact

Billing Contact

Access Level

Company Verifier Access Only ▾

Role

COMPANY_USER

SAVE

Once all applicable information has been entered click Save.

The user will then receive an auto-generated email with a temporary password and a link to register their account.

Create the Compare Only

Please note audit creation is restricted to Company Admin users which are only available under the Platinum Elite Plan. The compare process consists of several steps from naming the compare up to the completion of the comparison. Each step must be completed to advance through the compare process. All steps beyond Step 5 - Compare can be ignored if not needed. Prior completed steps with the exclusion of the compare creation can be revisited and reset if desired.

Create New Compare

Select NEW to begin a new comparison

ML: Demo Company

Welcome, malanier2024!

| Information | EDIT | Comparisons | NEW |
|----------------------------------|--|------------------|-----|
| Company Name ML: Demo Company | Organization Name Data Management Solutions-DVP Internal Use | test Complete | |

Name the Compare

Enter the comparison name in the field provided. Select Audit Type from the dropdown and add Additional Notes if desired. Select Compare Only for the Comparison Type and click SAVE.

Please Note that once the comparison type is selected and saved, it cannot be changed.

New Comparison

Name

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Comparison Type

Compare Only

SAVE

Carrier Selection is only available under the Platinum Elite or Subscription Based Audits plans

Import Files

Import baseline and secondary files, select specific worksheets (if applicable), then click SAVE. If you use same file for both baseline and secondary, click USE BASELINE FILE. Rename file names using 31 characters or less, if desired.

Import Data

Select the files to be used for comparison.

Baseline File

Choose File Test Files for ...03.07.2024.xlsx

Select Worksheet

baseline

Baseline File Name

Base .xlsx

Secondary File

Choose File Test Files for ...03.07.2024.xlsx

USE BASELINE FILE

Select Worksheet

secondary

Secondary File Name

Secondary .xlsx

BACK SAVE

Select Data Points & Create Import Template

Streamline will automatically match data points that share the same name, as well as certain internally mapped keywords (e.g., DOB to Date of Birth). For any fields that are not matched, the corresponding data point can be selected from the dropdown in the Secondary column.

Data points, whether matched or not, can be removed by clicking the **X** to the right of the data point.


The option to use AI is available by selecting the **AI AUTO MATCH DATA POINTS** button. This will prompt the system to attempt to match any remaining data points. All AI-matched fields will display an AI icon beside the data point.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template

Use Streamline AI to automatically match any remaining unmatched columns present in both files.
AI Auto-Match is not 100% accurate. Please review all matches to ensure they are correct.

AI AUTO-MATCH DATA POINTS

Member First Name First Name Unique Identifier 

Please note that AI Auto Match is not 100% accurate. All matches should be reviewed to ensure accuracy.

At least **one (1) unique identifier** must be selected. To remove all data points, click **CLEAR ALL**.

If a masked SSN is used as one of multiple unique identifiers, only the **last four digits** will be considered.

Note: When using a masked SSN, it is strongly recommended to include additional unique identifiers (UIs) such as first name, last name, date of birth, or relationship (if applicable) to ensure the most accurate results.

Optionally, check **SHARE WITH ORGANIZATION** to add the template to your Organization-Level Template Library. Templates shared by an Organization Admin or Organization Compare User can be accessed across all companies within the same organization.

Company Admins (available under the Platinum Elite subscription) will only have access to templates created within their specific company.

Once all desired data points and unique identifiers have been selected, the configuration can be saved for future use by entering a **Template Name** and clicking **SAVE**.

Select Data Points

Select the data points from each file to be included in the comparison. One or more data point pairs must be specified as the unique identifier for the record.
When a masked SSN is used as one of multiple unique identifiers, only the last 4 digits will be considered.
Please note when using a masked SSN, it is recommended to use multiple unique identifiers (UI) to return optimal results. UI examples include but are not limited to first name, last name, date of birth, and relationship, if applicable.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template ▼

Use Streamline AI to automatically match any remaining unmatched columns present in both files.
AI Auto-Match is not 100% accurate. Please review all matches to ensure they are correct.

AI AUTO-MATCH COMPLETE

| base.xlsx base ssn | second.xlsx second ssn | | | |
|-----------------------|---------------------------|-------------------------------------|-------------------|--|
| SSN | SSN | <input checked="" type="checkbox"/> | Unique Identifier | |
| Middle Name | Middle Name | <input type="checkbox"/> | Unique Identifier | |
| Employment Status | Employment Status | <input type="checkbox"/> | Unique Identifier | |
| Gender | Sex | <input type="checkbox"/> | Unique Identifier | |
| Member First Name | First Name | <input checked="" type="checkbox"/> | Unique Identifier | AI |
| Member Last Name | Last Name | <input checked="" type="checkbox"/> | Unique Identifier | AI |
| Birthdate | DOB | <input type="checkbox"/> | Unique Identifier | AI |
| Medical Plan | Health Coverage | <input type="checkbox"/> | Unique Identifier | AI |

CLEAR ALL

+ ADD DATA POINT

Optionally, specify a name below if you wish to save these data points as a new Data Points Template, for re-use in later comparisons.

Data Points Template Name

Share with Organization

BACK SAVE

Select Data Points & Reuse Existing Template

Select a relevant data points template from the dropdown menu. Templates will only appear if the data points align with the column names in the import file.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template
User Guide Data Points Template

If no template is available, you can create one by selecting the desired data points and unique identifier(s), then entering a template name. Once saved, the template will be added to your library for future use and can optionally be shared with the organization for use across other companies.



NOTE: When using a saved template, any changes made during the audit—such as adding or removing data points—are temporary and will not modify the existing template.

To preserve changes, create a new template by entering a new template name and clicking **SAVE**.

For example, in the scenario below, the auditor used the Demo Import Template but removed the DOB data point. This modification is temporary and does not affect the original template. By saving with a new template name, a separate version is created without the DOB data point.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template

Use Streamline AI to automatically match any remaining unmatched columns present in both files.

AI Auto-Match is not 100% accurate. Please review all matches to ensure they are correct.

[+ AI AUTO-MATCH DATA POINTS](#)

| base.xlsx base ssn | second.xlsx second ssn | | |
|--|--|---|---|
| <input type="text" value="SSN"/> | <input type="text" value="SSN"/> | <input checked="" type="checkbox"/> Unique Identifier | × |
| <input type="text" value="Middle Name"/> | <input type="text" value="Middle Name"/> | <input type="checkbox"/> Unique Identifier | × |
| <input type="text" value="Employment Status"/> | <input type="text" value="Employment Status"/> | <input type="checkbox"/> Unique Identifier | × |
| <input type="text" value="Gender"/> | <input type="text" value="Sex"/> | <input type="checkbox"/> Unique Identifier | × |
| <input type="text" value="Member First Name"/> | <input type="text" value="First Name"/> | <input checked="" type="checkbox"/> Unique Identifier | × |
| <input type="text" value="Member Last Name"/> | <input type="text" value="Last Name"/> | <input checked="" type="checkbox"/> Unique Identifier | × |
| <input type="text" value="Medical Plan"/> | <input type="text" value="Health Coverage"/> | <input type="checkbox"/> Unique Identifier | × |

[CLEAR ALL](#)

[+ ADD DATA POINT](#)

Optionally, specify a name below if you wish to save these data points as a new Data Points Template, for re-use in later comparisons.

Data Points Template Name

Share with Organization

[BACK](#) [SAVE](#)

Mapping

Add customized mapping for data such as plans, tiers, or departments by utilizing the MAP buttons. Existing mappings for the company or created and shared at the Organization level can be re-used or new mappings can be created.

Mappings can be created several ways.

1. Manually create a mapping
2. Import a mapping
3. Copy and reuse an existing mapping

To Manually create a mapping:

To manually add a new mapping click NEW MAPPINGS. Add a mapping name and then enter the source value data as well as the target value by clicking ADD MAPPINGS. Multiple mapped values can be added.

Click SAVE MAPPINGS to newly created mapping to save.

Gender - Sex ✕

Select Mappings NEW MAPPINGS or

Data Mappings name

IMPORT

Excel file must have 2 columns: Source Value and Target Value

| Source Value | Target Value |
|---------------------------------------|---|
| Source <input type="text" value="F"/> | Target <input type="text" value="Female"/> ✕ |
| Source <input type="text" value="M"/> | Target <input type="text" value="Male"/> ✕ |

+ ADD MAPPING

SAVE MAPPINGS

If you use existing mapping, click SELECT MAPPINGS.

| | | | |
|-------------------|-------------------|--|---|
| Gender | Sex | MAP | none |
| Member First Name | First Name | MAP | |
| Member Last Name | Last Name | MAP | |
| Medical Plan | Medical | MAP | none |
| Monthly Cost | Monthly Plan Cost | MAP | none |

Gender - Sex ✕

Select Mappings Gender
or NEW MAPPINGS

COPY MAPPINGS

Source Value

Source

Source

Target Value

Target

Target

SELECT MAPPINGS

VIEW IN MAPPINGS LIBRARY

Gender
Sex
GENDER
none

To Import a mapping:

To add a new mapping, click **New Mappings**. Enter a mapping name, then select **Import**.

The import file may be a single-sheet Excel file or a CSV file. If you are using an Excel file with multiple sheets, the mapping **must** be on the first tab—otherwise, the import will fail.

After the data is imported, click **Save Mappings**. The mapping is now saved and ready to use.

Gender - Sex

Select Mappings or **NEW MAPPINGS**

Data Mappings name
Gender Import_01.05.2026

IMPORT

Excel file must have 2 columns: Source Value and Target Value

| Source Value | Target Value |
|--------------|--------------|
| F | Female |
| M | Male |
| N | Non-binary |

+ ADD MAPPING

SAVE MAPPINGS

To Copy and modify an existing mapping:

To reuse an existing mapping, search for it in the **Select Mappings** dropdown. Once selected, click **Copy Mappings**.

Medical Plan - Medical

Select Mappings
2025 BCBS Plans

or **NEW MAPPINGS**

COPY MAPPINGS

| Source Value | Target Value |
|--------------|--------------|
| Plan 1 | HSA |
| Plan 2 | PPO |

SELECT MAPPINGS

VIEW IN MAPPINGS LIBRARY

This creates a duplicate of the mapping with **(copy)** added to the name. You can then rename the mapping and add, update, or remove any source or target values as needed.

When your changes are complete, click **Save Mappings**. The updated mapping is now saved and ready to use.

Medical Plan - Medical

Select Mappings
2025 BCBS Plans or NEW MAPPINGS

Data Mappings name
2025 BCBS Plans (Copy)

IMPORT

Excel file must have 2 columns: Source Value and Target Value

| Source Value | Target Value |
|------------------|-------------------|
| Source Plan 1 | Target HSA |
| Source Plan 2 | Target PPO |
| Source Plan 3 | Target Limited |

+ ADD MAPPING

SAVE MAPPINGS



NOTE: The **SOURCE VALUE** in mapping must be unique. If the same value is used more than once under **SOURCE**, an error will occur. However, it is acceptable to use the same **TARGET VALUE** multiple times.

Data Mappings name
Deduction Code

| Source Value | Target Value |
|---------------|----------------------|
| Source STD | Target STD 14 day |
| Source STD | Target STD 30 day |

Data Mappings name
Deduction Code

| Source Value | Target Value |
|----------------------|---------------|
| Source STD 14 day | Target STD |
| Source STD 30 day | Target STD |

Mapping – Date Format

If the date is not formatted in the files as a date or a different formatting type, select the matching format to convert from text to date and then SAVE DATE FORMAT. If matching format is not available, the date must be corrected manually in the files and then re-imported. Click NEXT once the mapping is complete.

| 'Base' | 'Secondary' | Data Mappings | Date Format | Computation Function |
|-------------------|-------------------|--|-------------------------------------|--|
| DOB | DOB | <input type="button" value="MAP"/> | <input type="button" value="none"/> | DOB - DOB <input type="button" value="X"/> |
| Employment Status | Employment Status | <input type="button" value="EMPLOYMENT STATUS"/> | <input type="button" value="NONE"/> | |

If one of the file's cells are not formatted as a "Date" in Excel, select the format below and the system will attempt to convert it to a date during the comparison. For unsupported date formats, you may need to re-import your file after converting the cells to a date format.

Format:

Mapping – Computation

Add a computation (subtraction, addition, multiplication, division) to any numeric data point from the baseline file to any numeric data point in the secondary file. Add the computation by clicking the button under the Computation Function column for the desired data points and then selecting the function required.

| Computation Function |
|-------------------------------------|
| <input type="button" value="NONE"/> |
| <input type="button" value="NONE"/> |
| <input type="button" value="NONE"/> |

If both files contain a numeric value, and there is a discrepancy between the two values, the system will attempt to run the selected computation function on the values. If successful, the resulting discrepancy computation value will be included on the the Discrepancy Reports.

Format:

- NONE
- MINUS: BASELINE - SECONDARY
- MINUS: SECONDARY - BASELINE
- ADD
- MULTIPLY
- DIVIDE: BASELINE / SECONDARY
- DIVIDE: SECONDARY / BASELINE

An optional rounding variance can also be applied to the **Minus** computation. When used, any difference between the baseline and secondary values that falls within the selected range will not be flagged as a discrepancy. This option is typically used when a known or acceptable variance is expected.

Monthly Cost
Monthly Plan Cost
MAP
none

Monthly Cost - Monthly Plan Cost

If both files contain a numeric value, and there is a discrepancy between the two values, the system will attempt to run the selected computation function on the values. If successful, the resulting discrepancy computation value will be included on the the Discrepancy Reports.

Format: MINUS: BASELINE - SECONDARY

Optional: If the absolute difference is within the rounding range, it will not be flagged as a discrepancy.

Rounding Range: 0.03

SAVE COMPUTATION FUNCTION

The computation function generates a new column in the downloadable Discrepancy Report based on the calculated results, and these results are included in both the discrepancy counts and discrepancy report tables.

Comparison Details

Discrepancy Counts by Data Point

| 'Base' | 'Secondary' | Computation Function | Count |
|-------------------|-------------------|-----------------------------|-------|
| First Name | First Name | | 1 |
| Employment Status | Employment Status | | 1 |
| Monthly Premium | Monthly Premium | minus: baseline - secondary | 4 |

Missing Counts

No missing records found!

Discrepancy Report

| First name | Last name | Relationship | Unique Identifier | 'Base' row / data point | 'Secondary' row / data point | 'Base' value | 'Secondary' value | Computation Function Result |
|------------|-----------|--------------|--------------------|-------------------------|------------------------------|--------------|-------------------|-----------------------------|
| Katherine | Aldridge | | 217219160_****9160 | 4 / Monthly Premium | 4 / Monthly Premium | 654.98 | 259.55 | 395.43 |



Note: This functionality applies **only to numeric fields**, and **only to data points that are *not* part of the unique identifier**.

Only results from the **subtraction (minus)** function will proceed through the full compare process. All other functions will stop at **Step 5**.

Compare

Verify selected information and click COMPARE. Comparison Name, Carrier (if applicable), Audit Type, Setup Notes, and Auditor Memo can be edited. [Please note that the Auditor Memo is automatically included in the email to the Verifier.](#)

Compare

Please review the details of this comparison below.

| | | | |
|--|---|--|---|
| <p>Comparison Name Demo</p> <p>Carrier</p> <p>Assigned Verifier Unassigned</p> <p>Created By / Auditor maryl</p> <p>Current Step Compare</p> <p>Baseline Worksheet baseline</p> <p>Secondary Worksheet secondary</p> <p>Unique Identifiers ('base' - 'second') First Name - First Name Last Name - Last Name Employee SSN - Social Security Number</p> <p>Data Point Mappings ('base' - 'second' -> Mapping Name) Gender - Gender -> Gender</p> | <p>EDIT</p> <p>EDIT</p> <p>EDIT</p> | <p>Audit Type</p> <p>Setup Notes</p> <p>Auditor Memo</p> <p>Verifier Memo</p> <p>Baseline File base.xlsx</p> <p>Secondary File second.xlsx</p> <p>Comparison Type Compare Only</p> <p>Data Points ('base' - 'second') Middle Name - Middle Name DOB - Date of Birth {date format:'MM/dd/yyyy'} Monthly Premium - Monthly Premium Gender - Gender</p> <p>Mappings (Source - Target) Gender F - Female M - Male</p> | <p>EDIT</p> <p>EDIT</p> <p>EDIT</p> |
|--|---|--|---|

[BACK](#)
[COMPARE](#)

Compare is complete. Comparison results are available for view and for download by clicking the **SELECT FILE TO DOWNLOAD**. The original files can also be accessed from the dropdown as well as another discrepancy report where all data points are included for the row where a discrepancy was identified. If Verification is not needed, Compare can be closed by clicking **OVERRIDE AS COMPLETE**.

View Reports

The comparison process has finished. You can download the discrepancy reports and original files below, or proceed to verify any discrepancies.

Select file to download

Comparison Details

| 'base' | 'second' | Computation Function | Count |
|-------------------|-------------------|-----------------------------|-------|
| First Name | First Name | | 2 |
| Last Name | Last Name | | 1 |
| Employment Status | Employment Status | | 1 |
| Monthly Premium | Monthly Premium | minus: baseline - secondary | 1 |

| Missing from 'base' | Missing from 'second' |
|---------------------|-----------------------|
| 0 | 1 |

Discrepancy Report

| First name | Last name | Relationship | Unique Identifier | 'base' row / data point | 'second' row / data point | 'base' value | 'second' value | Computation Function Result |
|------------|-----------|--------------|-------------------|-------------------------|---------------------------|--------------|----------------|-----------------------------|
| Katherine | Aldridge | | 9160_217219160 | 4 / Monthly Premium | 4 / Monthly Premium | 654.98 | 259.55 | 395.43 |
| | Benefits | | 1234_555661234 | 13 / First Name | 13 / First Name | Julia | JuliaAnne | |
| | Demo | | 9696_555129696 | 52 / First Name | 52 / First Name | Wednesday | Monday | |
| Eric | Fisherly | | 7840_217217840 | 67 / Employment Status | 67 / Employment Status | Termed | Active | |
| Jasmine | | | 1335_555421335 | 44 / Last Name | 44 / Last Name | Delete | Donald | |

Rows per page: 5 1-5 of 5 < >

Missing Report

| First name | Last name | Relationship | Unique Identifier | 'base' row | 'second' row | Duplicate unique identifier row |
|------------|-----------|--------------|-------------------|------------|--------------|---------------------------------|
| Tricia | Yang | | 0260_217220260 | 203 | | |

Rows per page: 5 1-1 of 1 < >



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 **Request Support** option provides quick and 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 teams stay focused and ensuring issues are addressed efficiently.

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

The **Request Support** button is available only on the Compare screen and can be selected once per audit. If another support request is needed for the same comparison, the audit must be reset to a previous step. If the audit still contains more than 30 discrepancies and/or missing items after reset, the **Request Support** option will become available again.

View Reports

The comparison process has finished. You can download the discrepancy reports and original files below, or proceed to verify any discrepancies.

Select file to download

Comparison Details

Discrepancy Counts by Data Point

| 'Ease' | ' Standard invoice' | Computation Function | Count |
|------------|---------------------|-----------------------------|-------|
| Total Rate | Total Cost | minus: baseline - secondary | 33 |

Missing Counts

| Missing from 'Ease' | Missing from ' Standard invoice' |
|---------------------|----------------------------------|
| 48 | 3 |

Need Help?

If you need assistance with this audit please click on the button below to request support from our team. A member of our team will reach out to you within 1 business day. For immediate assistance, email support@dms-datavalidate.com.

REQUEST SUPPORT

Verify Discrepancies

Verify Discrepancy Data entries are identified by the system when the unique identifier from one file is matched to an entry in the opposing file and one or more of the remaining data points do not match. Verify the data discrepancies by selecting the existing value, creating new, or ignoring. A discrepancy type can also be selected from the dropdown. Once ALL have been verified click SAVE and then NEXT. Auditor comments can be added to Discrepancy Type / Note in the Auditor Notes field. Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

Verify Discrepancies

Verify the discrepancies below by selecting the correct value for each discrepancy. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details ▼

| First name | Last name | Relationship | 'base' row / data point | 'second' row / data point | Verified Value (Baseline value appears first) | Last Verified By | Discrepancy Type / Notes |
|------------|-----------|--------------|-------------------------|---------------------------|--|------------------|---|
| Katherine | Aldridge | | 4 / Monthly Premium | 4 / Monthly Premium | <input type="radio"/> 654.98 <input type="radio"/> 259.55 <input type="text" value="Overwrite"/> <input type="radio"/> Ignore | -- | Discrepancy Type <input type="text"/> Auditor notes Premium not the same in carrier as the Ben Admin system. Verifier notes <input type="text"/> |

If the discrepancy is not a true discrepancy or if the verifier desires to ignore it, select IGNORE. Any discrepancy marked as IGNORE, can be minimized by clicking the caret (^)

Verify Discrepancies

Verify the discrepancies below by selecting the correct value for each discrepancy. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details ▼

| First name | Last name | Relationship | 'base' row / data point | 'second' row / data point | Verified Value (Baseline value appears first) | Last Verified By | Discrepancy Type / Notes |
|------------|-----------|--------------|-------------------------|---------------------------|---|------------------|---|
| Katherine | Aldridge | | 4 / Monthly Premium | 4 / Monthly Premium | <input type="radio"/> 654.98 <input type="radio"/> 259.55 <input type="text" value="Overwrite"/> <input checked="" type="radio"/> Ignore ^ | -- | Discrepancy Type <input type="text"/> Auditor notes <input type="text"/> Verifier notes <input type="text"/> |

| | | | | | | | |
|-----------|----------|--|---------------------|---------------------|----------|--|--|
| Katherine | Aldridge | | 4 / Monthly Premium | 4 / Monthly Premium | Ignore ▼ | | |
|-----------|----------|--|---------------------|---------------------|----------|--|--|

Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. [The Verifier Memo is automatically included in the email back to the Auditor.](#)

Verify Missing

Verify Missing Data entries are identified by the system when the unique identifier from one file cannot be found in the other. If the entry needs to be included, check Include? For a shortcut, click INCLUDE ALL or EXCLUDE ALL to select/deselect all entries. If INCLUDE is selected, the entry will be included in the export files. Once the Verify Missing Data has been verified, click SAVE and then NEXT. Auditor comments can be added to Discrepancy Type / Notes in the Auditor Notes field and a specific discrepancy type can be selected in the Discrepancy Type dropdown. Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

Verify Discrepancies

Verify the missing discrepancies below by selecting whether or not the missing records should be included or excluded in the verified output files. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details

| First name | Last name | Relationship | Unique Identifier | 'base' row | 'second' row | Duplicate unique identifier row | Verified Inclusion | Last Verified By | Discrepancy Type / Notes |
|------------|-----------|--------------|---------------------|------------|--------------|---------------------------------|--|------------------|---|
| Julia | Benefits | | julia_benefits_1234 | 13 | | | <input type="radio"/> Include <input type="radio"/> Exclude | | Discrepancy Type Auditor notes Verifier notes |

Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. [The Verifier Memo is automatically included in the email back to the Auditor.](#)

The screenshot shows a web interface with a 'Verifier Memo' dropdown menu. The dropdown is open, showing a text input field with the placeholder text 'Verifier Memo'. Below the input field, there is a small note: 'General purpose notes available to the assigned verifier, that (if a verifier is assigned) will be communicated back to the auditor via automated email.' To the left of the dropdown, there are three buttons: 'BACK', 'NEXT', and 'OVERRIDE AS COMPLETE'. At the top right of the page, there is a pagination control showing 'Rows per page: 5' and '1-2 of 2'.

Assign a Verifier to the Compare

A verifier can be assigned to complete the comparison. To assign a verifier, select the Verifier Details dropdown. In the Verifier Details section, select the EDIT option for Assigned Verifier.

The screenshot shows the 'Verify Discrepancies' section. It contains instructions on how to assign a verifier. A dropdown menu labeled 'Verifier Details' is highlighted with a red box. An arrow points from this dropdown to a detailed view of the 'Verifier Details' section. In this view, the 'Assigned Verifier' dropdown is highlighted with a red box and has an 'EDIT' button next to it. Other fields include 'Auditor Memo' with an 'EDIT' button, 'Setup Notes', 'Carrier', 'Audit Type', 'Created By / Auditor' (with the value 'maryl'), and 'Comparison Type' (with the value 'Compare + Merge').

This will open up the comparison edit section. In the Assigned Verifier dropdown, select an applicable user. **An audit can be assigned to anyone who has access to the specific company and only to users with the same level access. For example, a Company Admin user can only assign an audit to other Company Admins or Company Verifiers within the same company. An Org Level user can assign to other users within the same organization and all company level users.**

A notification email containing Auditor name, Organization/Company Name, Audit Name, and a link to the specific audit is generated once a verifier has been assigned.

Hello {Verifier First Name},

{Auditor First Name and Last Name} at {Organization Name if Org Level or Company Name if Company Level User} has finished auditing your data and has designated you as the verifier for this comparison: {Comparison Name} for {Company Name}.

Please [click here](#) below to log in and complete the verification process for any discrepancies.

{Auditor Memo}

Thank you,

On behalf of {Auditor First Name and last Name}, {Organization Name if Org Level or Company Name if Company Level User}

This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

Edit Comparison

Comparison Name
Demo for User Guides

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Comparison Type
Compare Only

Created By / Auditor
maryl

Auditor Memo

General purpose auditor notes that will be communicated to the verifier (assigned below) via automated email.

Assigned Verifier

Verifier Memo

General purpose notes available to the email.

SAVE

Unassigned

companyverifier-dms

demobroker1

malanier2024

The notification email can be sent from either the Verify Discrepancy Step or the Verify Missing Data step.

A notification email can be resent if the audit has not reached the completion step (Step 8). To resend the notification email, navigate to the Verifier Details and click EDIT for the Assigned Verifier. Click RESEND to resend the notification email to the currently assigned verifier.

Complete the form below to update this comparison's information.

Edit Comparison

Comparison Name
Demo - Compare and Merge

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Resend the notification email to the assigned verifier.

RESEND

Complete the Compare

Data verification is complete.

If the audit was assigned to a specific user within the application, the auditor will receive a notification email that the audit is complete.

Hello {Auditor First Name},

This is to inform you that the assigned verifier, {Verifier First Name and Last Name}, has finished verifying the discrepancies for your comparison: {Comparison Name} for {Company Name}.

Please [click here](#) below to log in and complete the audit process.

{Verifier Memo}

Thank you,

On behalf of {Verifier First Name and Last Name}, {Organization Name if Org Level or Company Name if Company Level User}

This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

The verified baseline and secondary files can be downloaded with all records including verified or verified records only by utilizing dropdown. If a discrepancy was ignored, the record **will not be included** in the Verified records only download. The ignored record will continue to show in the All records including verified download.

Complete

All discrepancies have been verified and this comparison is now completed! You may export the files containing the verified changes below.

Comparison Details

Select file to export

BACK GO TO ALL COMPARISONS

-- Select --

Base

Secondary

Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the application's key words. For a list of the keywords, please reference the Keys Words page.

Select file to export: Base

Customize Export - 'Base'

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

No applicable Export Templates

| Original Name | Rename To | Format Values |
|------------------------|----------------------|----------------------|
| Employee SSN | <input type="text"/> | <input type="text"/> |
| Social Security Number | <input type="text"/> | <input type="text"/> |
| First Name | <input type="text"/> | <input type="text"/> |
| Middle Name | <input type="text"/> | <input type="text"/> |
| Last Name | <input type="text"/> | <input type="text"/> |
| Display Name | <input type="text"/> | <input type="text"/> |
| DOB | <input type="text"/> | <input type="text"/> |
| Employment Status | <input type="text"/> | <input type="text"/> |
| Testing Scenario | <input type="text"/> | <input type="text"/> |
| Monthly Premium | <input type="text"/> | <input type="text"/> |

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name:

Share with Organization

[SAVE CUSTOMIZATIONS](#)

[EXPORT ALL RECORDS INCLUDING VERIFIED](#) [EXPORT VERIFIED RECORDS ONLY](#)

[BACK](#) [GO TO ALL COMPARISONS](#)

Column names can also be reordered by dragging and dropping data point in desired location.

Middle Name

DOB

Last Name

Click SAVE CUSTOMIZATIONS if desired. Customization is also automatically saved when the export files (All Records Including Verified and Verified Records Only) are downloaded.

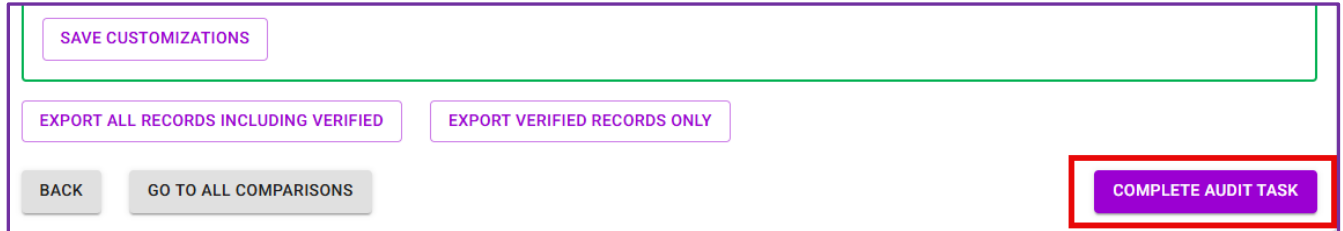
[SAVE CUSTOMIZATIONS](#)

[EXPORT ALL RECORDS INCLUDING VERIFIED](#) [EXPORT VERIFIED RECORDS ONLY](#)

[BACK](#) [GO TO ALL COMPARISONS](#) [COMPLETE AUDIT TASK](#)

If an audit was created through an **Audit Task**, Agency users can close the task directly from within the audit by selecting **COMPLETE AUDIT TASK**.

This reduces the need to navigate back to the Audit Task, streamlining the workflow.



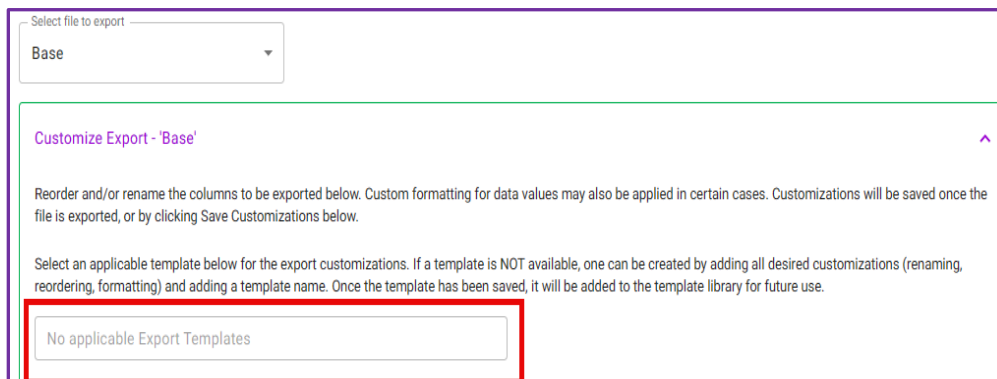
The screenshot shows a control panel with several buttons. At the top left is a purple button labeled 'SAVE CUSTOMIZATIONS'. Below it are two purple buttons: 'EXPORT ALL RECORDS INCLUDING VERIFIED' and 'EXPORT VERIFIED RECORDS ONLY'. At the bottom left are two grey buttons: 'BACK' and 'GO TO ALL COMPARISONS'. On the right side, there is a purple button labeled 'COMPLETE AUDIT TASK', which is highlighted with a red rectangular border.

Export Template

Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming and saving the template. Once the template has been saved, it will be added to the template library for future use.

Optionally, check **SHARE WITH ORGANIZATION** to add the template to the Organization Level Template library. **Any template shared with an organization and created by an organization administrator, or an organization compare user, can be utilized under any company within that specific organization. Company admins and company compare users which are available under our Platinum Elite subscription will only have access to the templates that are created under their specific company.**

Selecting export template:



The screenshot shows the 'Customize Export' interface. At the top, there is a dropdown menu labeled 'Select file to export' with 'Base' selected. Below the dropdown is a section titled 'Customize Export - 'Base'' with a collapse icon. The section contains instructions: 'Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. Customizations will be saved once the file is exported, or by clicking Save Customizations below.' and 'Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.' At the bottom of this section, there is a text box containing the message 'No applicable Export Templates', which is highlighted with a red rectangular border.

Saving New Export Template:

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

Export Template

Share with Organization

The data comparison and verification processes are complete. To see other comparisons or to begin a new, click GO TO ALL COMPARISONS.

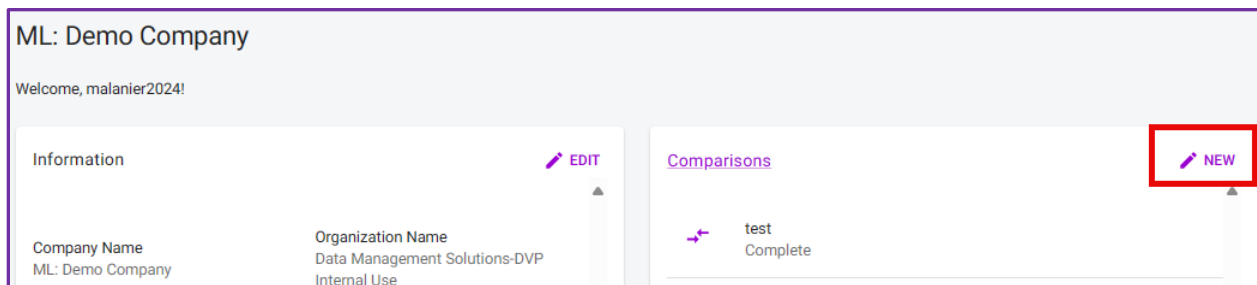
Questions: Contact Support@dms-datavalidate.com

Create the Compare and Merge

Please note audit creation is restricted to Company Admin users which are only available under the Platinum Elite Plan. The compare process consists of several steps from naming the compare up to the completion of the comparison. Each step must be completed to advance through the compare process. All steps beyond Step 5 - Compare can be ignored if not needed. Prior completed steps with the exclusion of the compare creation can be revisited and reset if desired.

Create New Compare

Select NEW to begin a new comparison.



The screenshot shows a user interface for a company named 'ML: Demo Company'. The user is logged in as 'malanier2024!'. There are two main sections: 'Information' and 'Comparisons'. The 'Information' section has an 'EDIT' button. The 'Comparisons' section has a 'NEW' button highlighted with a red box. Below the 'Information' section, there are two columns of data: 'Company Name' (ML: Demo Company) and 'Organization Name' (Data Management Solutions-DVP Internal Use). Below the 'Comparisons' section, there is a table with one row: 'test' and 'Complete'.

Name the Compare

Enter the comparison name in the field provided. Select Audit Type from the dropdown and add Additional Notes if desired. Select Compare & Merge for the Comparison Type and click SAVE.

Please Note that once the comparison type is selected and saved, it cannot be changed.

New Comparison

Name
Demo - Compare and Merge

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Comparison Type
Compare & Merge

SAVE

Carrier Selection is only available under the Platinum Elite or Subscription Based Audits plans

Import Files

Import baseline and secondary files, select specific worksheets (if applicable), then click SAVE. If you use same file for both baseline and secondary, click USE BASELINE FILE. Rename file names using 31 characters or less, if desired.

Import Data

Select the files to be used for comparison.

Baseline File

Choose File Test Files for ...03.07.2024.xlsx

Select Worksheet
baseline

Baseline File Name
Base .xlsx

Secondary File

Choose File Test Files for ...03.07.2024.xlsx

USE BASELINE FILE

Select Worksheet
secondary

Secondary File Name
Secondary .xlsx

BACK SAVE

Select Data Points & Create Import Template

Streamline will automatically match data points that share the same name, as well as certain internally mapped keywords (e.g., DOB to Date of Birth). For any fields that are not matched, the corresponding data point can be selected from the dropdown in the Secondary column.

Data points, whether matched or not, can be removed by clicking the **X** to the right of the data point.

The option to use AI is available by selecting the **AI AUTO MATCH DATA POINTS** button. This will prompt the system to attempt to match any remaining data points. All AI-matched fields will display an AI icon beside the data point.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template

Use Streamline AI to automatically match any remaining unmatched columns present in both files.
AI Auto-Match is not 100% accurate. Please review all matches to ensure they are correct.

AI AUTO-MATCH DATA POINTS

Member First Name First Name Unique Identifier **AI**

Please note that AI Auto Match is not 100% accurate. All matches should be reviewed to ensure accuracy.

To Merge a data point without comparing, select [merge] in the corresponding dropdown

Data Point Date of Hire Unique Identifier X

+ ADD DATA POINT

[merge] Employee SSN Social Security Number First Name

At least **one (1) unique identifier** must be selected. To remove all data points, click **CLEAR ALL**.

If a masked SSN is used as one of multiple unique identifiers, only the **last four digits** will be considered.

Note: When using a masked SSN, it is strongly recommended to include additional unique identifiers (UIs) such as first name, last name, date of birth, or relationship (if applicable) to ensure the most accurate results.

Optionally, check **SHARE WITH ORGANIZATION** to add the template to your Organization-Level Template Library. Templates shared by an Organization Admin or Organization Compare User can be accessed across all companies within the same organization.

Company Admins (available under the Platinum Elite subscription) will only have access to templates created within their specific company.

Once all desired data points and unique identifiers have been selected, the configuration can be saved for future use by entering a **Template Name** and clicking **SAVE**.

Select Data Points

Select the data points from each file to be included in the comparison. One or more data point pairs must be specified as the unique identifier for the record.

When a masked SSN is used as one of multiple unique identifiers, only the last 4 digits will be considered.

Please note when using a masked SSN, it is recommended to use multiple unique identifiers (UI) to return optimal results. UI examples include but are not limited to first name, last name, date of birth, and relationship, if applicable.

To merge a field from one file into the other, select the [merge] option for that field.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template

User Guide Data Points Template

Use Streamline AI to automatically match any remaining unmatched columns present in both files.

AI Auto-Match is not 100% accurate. Please review all matches to ensure they are correct.

AI AUTO-MATCH DATA POINTS

base.xlsx
base ssn

second.xlsx
second ssn

| |
|-------------------|
| SSN |
| Gender |
| Member First Name |
| Member Last Name |
| Birthdate |
| Medical Plan |
| Middle Name |
| [merge] |

| |
|-------------------|
| SSN |
| Sex |
| First Name |
| Last Name |
| DOB |
| Health Coverage |
| [merge] |
| Employment Status |

- Unique Identifier
- Unique Identifier
- Unique Identifier
- Unique Identifier
- Unique Identifier
- Unique Identifier
- Unique Identifier
- Unique Identifier

CLEAR ALL

- X
- X
- X
- X
- X
- X
- X
- X

+ ADD DATA POINT

Optionally, specify a name below if you wish to save these data points as a new Data Points Template, for re-use in later comparisons.

Data Points Template Name

Share with Organization

BACK

SAVE

Select Data Points & Reuse Existing Template

Select an applicable data points template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the import file column names. If a template is NOT available, one can be created by

selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use and can optionally be shared with the organization for reuse under other companies.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template
User Guide Data Points Template

Use Streamline AI to automatically match any remaining unmatched columns present in both files.



NOTE: When using a saved template, any changes made during the audit—such as adding or removing data points—are temporary and will not modify the existing template.

To preserve changes, create a new template by entering a new template name and clicking SAVE.

For example, in the scenario below, the auditor used the Demo Import Template but removed the DOB data point. This modification is temporary and does not affect the original template. By saving with a new template name, a separate version is created without the DOB data point.

Select Data Points

Select the data points from each file to be included in the comparison. One or more data point pairs must be specified as the unique identifier for the record.

When a masked SSN is used as one of multiple unique identifiers, only the last 4 digits will be considered.

Please note when using a masked SSN, it is recommended to use multiple unique identifiers (UI) to return optimal results. UI examples include but are not limited to first name, last name, date of birth, and relationship, if applicable.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template

Use Streamline AI to automatically match any remaining unmatched columns present in both files.

AI Auto-Match is not 100% accurate. Please review all matches to ensure they are correct.

[+ AI AUTO-MATCH DATA POINTS](#)

| base.xlsx baseline | second.xlsx secondary | | |
|---|---|---|---|
| <input type="text" value="Social Security Number"/> | <input type="text" value="Social Security Number"/> | <input checked="" type="checkbox"/> Unique Identifier | × |
| <input type="text" value="Employee SSN"/> | <input type="text" value="Employee SSN"/> | <input checked="" type="checkbox"/> Unique Identifier | × |
| <input type="text" value="First Name"/> | <input type="text" value="First Name"/> | <input type="checkbox"/> Unique Identifier | × |
| <input type="text" value="Middle Name"/> | <input type="text" value="Middle Name"/> | <input type="checkbox"/> Unique Identifier | × |
| <input type="text" value="Last Name"/> | <input type="text" value="Last Name"/> | <input type="checkbox"/> Unique Identifier | × |
| <input type="text" value="Employment Status"/> | <input type="text" value="Employment Status"/> | <input type="checkbox"/> Unique Identifier | × |
| <input type="text" value="Monthly Premium"/> | <input type="text" value="Monthly Premium"/> | <input type="checkbox"/> Unique Identifier | × |

[CLEAR ALL](#)

[+ ADD DATA POINT](#)

Optionally, specify a name below if you wish to save these data points as a new Data Points Template, for re-use in later comparisons.

Data Points Template Name

Share with Organization

[BACK](#)

[SAVE](#)

Mapping

Add customized mapping for data such as plans, tiers, or departments by utilizing the MAP buttons. Existing mappings for the company or created and shared at the Organization level can be re-used or new mappings can be created.

Mappings can be created several ways.

1. Manually create a mapping
2. Import a mapping

3. Copy and reuse an existing mapping

To Manually create a mapping:

To manually add a new mapping click NEW MAPPINGS. Add a mapping name and then enter the source value data as well as the target value by clicking ADD MAPPINGS. Multiple mapped values can be added.

Click SAVE MAPPINGS to newly created mapping to save.

Gender - Sex

Select Mappings or **NEW MAPPINGS**

Data Mappings name
Gender - Sex

IMPORT

Excel file must have 2 columns: Source Value and Target Value

| Source Value | Target Value |
|--------------|------------------|
| Source F | Target Female |
| Source M | Target Male |

+ ADD MAPPING

SAVE MAPPINGS

If you use existing mapping, click SELECT MAPPINGS.

| Gender | Sex | MAP | none |
|-------------------|-------------------|-----|------|
| Member First Name | First Name | MAP | |
| Member Last Name | Last Name | MAP | |
| Medical Plan | Medical | MAP | none |
| Monthly Cost | Monthly Plan Cost | MAP | none |

Gender - Sex

Select Mappings
Gender or **NEW MAPPINGS**

COPY MAPPINGS

| Source Value | Target Value |
|------------------|--------------|
| Source Female | Target F |
| Source Male | Target M |

SELECT MAPPINGS

VIEW IN MAPPINGS LIBRARY

| | | | |
|--------|-----|--------|------|
| Gender | Sex | GENDER | none |
|--------|-----|--------|------|

To Import a mapping:

To add a new mapping, click **New Mappings**. Enter a mapping name, then select **Import**.

The import file may be a single-sheet Excel file or a CSV file. If you are using an Excel file with multiple sheets, the mapping **must** be on the first tab—otherwise, the import will fail.

After the data is imported, click **Save Mappings**. The mapping is now saved and ready to use.

Gender - Sex ×

Select Mappings ▼ or **NEW MAPPINGS**

Data Mappings name
Gender Import_01.05.2026

IMPORT

Excel file must have 2 columns: Source Value and Target Value

| Source Value | Target Value |
|--------------|-----------------------------------|
| Source: F | Target: Female × |
| Source: M | Target: Male × |
| Source: N | Target: Non-binary × |

+ ADD MAPPING

SAVE MAPPINGS

To Copy and modify an existing mapping:

To reuse an existing mapping, search for it in the **Select Mappings** dropdown. Once selected, click **Copy Mappings**.

This creates a duplicate of the mapping with **(copy)** added to the name. You can then rename the mapping and add, update, or remove any source or target values as needed.

When your changes are complete, click **Save Mappings**. The updated mapping is now saved and ready to use.



NOTE: The **SOURCE VALUE** in mapping must be unique. If the same value is used more than once under **SOURCE**, an error will occur. However, it is acceptable to use the same **TARGET VALUE** multiple times.

Mapping – Date Format

If the date is not formatted in the files as a date or a different formatting type, select the matching format to convert from text to date and then SAVE DATE FORMAT. If matching format is not available, the date must be corrected manually in the files and then re-imported. Click NEXT once the mapping is complete.

| 'Base' | 'Secondary' | Data Mappings | Date Format | Computation Function |
|-------------------|-------------------|-------------------|-------------|----------------------|
| DOB | DOB | MAP | none | DOB - DOB |
| Employment Status | Employment Status | EMPLOYMENT STATUS | NONE | |

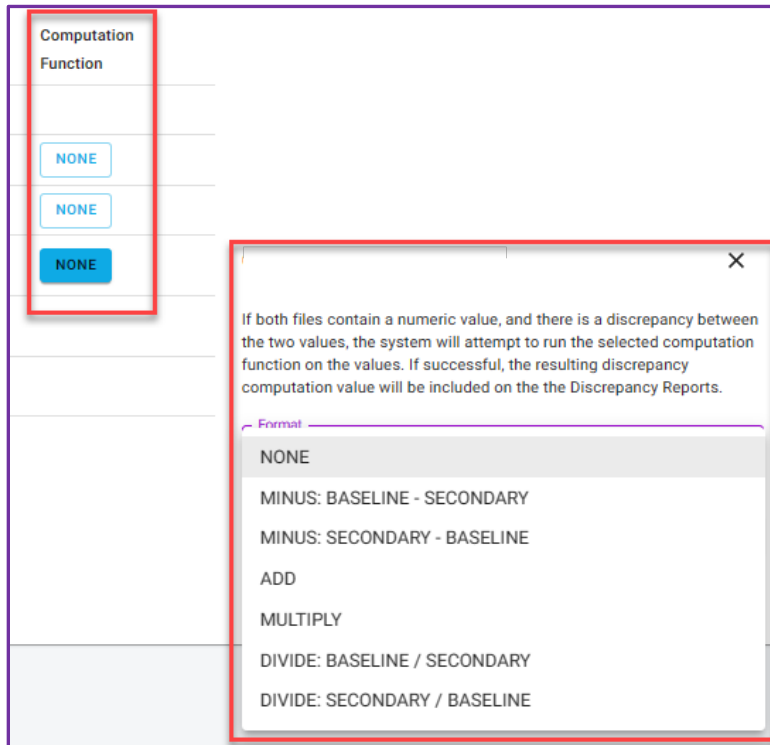
If one of the file's cells are not formatted as a "Date" in Excel, select the format below and the system will attempt to convert it to a date during the comparison. For unsupported date formats, you may need to re-import your file after converting the cells to a date format.

Format:

SAVE DATE FORMAT

Mapping – Computation

Add a computation (subtraction, addition, multiplication, division) to any numeric data point from the baseline file to any numeric data point in the secondary file. Add the computation by clicking the button under the Computation Function column for the desired data points and then selecting the function required.



The computation function will create a new column as a result of the computation in the downloadable Discrepancy Report and will be reflected in the discrepancy counts and discrepancy report tables.

Please note that this functionality will **ONLY** apply to numeric fields and then **ONLY** to data points that have **NOT** been selected as part of the unique identifier.

Only the subtraction (minus) results will continue through the remainder of the compare process. All other functions will end at Step 5.

| Discrepancy Counts by Data Point | | | | Missing Counts | |
|----------------------------------|-----------------|-----------------------------|-------|---------------------|--------------------------|
| 'Base' | 'Secondary' | Computation Function | Count | Missing from 'Base' | Missing from 'Secondary' |
| DOB | DOB | | 1 | 1 | 2 |
| Monthly Premium | Monthly Premium | minus: baseline - secondary | 4 | | |

| Discrepancy Report | | | | | | | | |
|--------------------|-----------|--------------|-----------------------------|-------------------------|------------------------------|--------------|-------------------|-----------------------------|
| First name | Last name | Relationship | Unique Identifier | 'Base' row / data point | 'Secondary' row / data point | 'Base' value | 'Secondary' value | Computation Function Result |
| Katherine | Aldridge | | 217219160_katherine_aldrige | 4 / Monthly Premium | 4 / Monthly Premium | 654.98 | 259.55 | 395.43 |

Compare

Verify selected information and click COMPARE. Comparison Name, Carrier (if applicable), Audit Type, Setup Notes, and Auditor Memo can be edited. [The Auditor Memo is automatically included in the email to the Verifier.](#)

Compare

Please review the details of this comparison below.

| | |
|--|--|
| <p>Comparison Name Demo - Compare and Merge</p> <p>Carrier</p> <p>Assigned Verifier Unassigned</p> <p>Created By / Auditor maryl</p> <p>Current Step Compare</p> <p>Baseline Worksheet baseline</p> <p>Secondary Worksheet secondary</p> <p>Unique Identifiers ('base' - 'second') Employee SSN - Employee SSN First Name - First Name Last Name - Last Name</p> | <p style="text-align: right;">EDIT</p> <p>Audit Type</p> <p style="text-align: right;">EDIT</p> <p>Setup Notes</p> <p style="text-align: right;">EDIT</p> <p>Auditor Memo</p> <p style="text-align: right;">EDIT</p> <p>Verifier Memo</p> <p>Baseline File base.xlsx</p> <p>Secondary File second.xlsx</p> <p>Comparison Type Compare + Merge</p> <p>Data Points ('base' - 'second') DOB - DOB (date format:'MM/dd/yyyy') Monthly Premium - Monthly Premium Gender - [merge] [merge] - Date of Hire (date format:'MM/dd/yyyy')</p> |
|--|--|

[BACK](#)
[COMPARE](#)

Compare is complete. Comparison results are available for view and for download by clicking the **SELECT FILE TO DOWNLOAD**. The original files can also be accessed from the dropdown as well as another discrepancy report where all data points are included for the row where a discrepancy was identified. If Verification is not needed, Compare can be closed by clicking **OVERRIDE AS COMPLETE**.

View Reports

The comparison process has finished. You can download the discrepancy reports and original files below, or proceed to verify any discrepancies.

Select file to download

Comparison Details

| 'base' | 'second' | Computation Function | Count |
|-------------------|-------------------|-----------------------------|-------|
| First Name | First Name | | 2 |
| Last Name | Last Name | | 1 |
| Employment Status | Employment Status | | 1 |
| Monthly Premium | Monthly Premium | minus: baseline - secondary | 1 |

| Missing from 'base' | Missing from 'second' |
|---------------------|-----------------------|
| 0 | 1 |

Discrepancy Report

| First name | Last name | Relationship | Unique Identifier | 'base' row / data point | 'second' row / data point | 'base' value | 'second' value | Computation Function Result |
|------------|-----------|--------------|-------------------|-------------------------|---------------------------|--------------|----------------|-----------------------------|
| Katherine | Aldridge | | 9160_217219160 | 4 / Monthly Premium | 4 / Monthly Premium | 654.98 | 259.55 | 395.43 |
| | Benefits | | 1234_555661234 | 13 / First Name | 13 / First Name | Julia | JuliaAnne | |
| | Demo | | 9696_555129696 | 52 / First Name | 52 / First Name | Wednesday | Monday | |
| Eric | Fisherly | | 7840_217217840 | 67 / Employment Status | 67 / Employment Status | Termed | Active | |
| Jasmine | | | 1335_555421335 | 44 / Last Name | 44 / Last Name | Delete | Donald | |

Rows per page: 5 1-5 of 5

Missing Report

| First name | Last name | Relationship | Unique Identifier | 'base' row | 'second' row | Duplicate unique identifier row |
|------------|-----------|--------------|-------------------|------------|--------------|---------------------------------|
| Tricia | Yang | | 0260_217220260 | 203 | | |

Rows per page: 5 1-1 of 1



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 **Request Support** option provides quick and 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 teams stay focused and ensuring issues are addressed efficiently.

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

The **Request Support** button is available only on the Compare screen and can be selected once per audit. If another support request is needed for the same comparison, the audit must be reset to a previous step. If the audit still contains more than 30 discrepancies and/or missing items after reset, the **Request Support** option will become available again.

View Reports

The comparison process has finished. You can download the discrepancy reports and original files below, or proceed to verify any discrepancies.

Select file to download

Comparison Details

Discrepancy Counts by Data Point

| 'Ease' | ' Standard invoice' | Computation Function | Count |
|------------|---------------------|-----------------------------|-------|
| Total Rate | Total Cost | minus: baseline - secondary | 33 |

Missing Counts

| Missing from 'Ease' | Missing from ' Standard invoice' |
|---------------------|----------------------------------|
| 48 | 3 |

Need Help?

If you need assistance with this audit please click on the button below to request support from our team. A member of our team will reach out to you within 1 business day. For immediate assistance, email support@dms-datavalidate.com.

REQUEST SUPPORT

Verify Discrepancies

Verify Discrepancy Data entries are identified by the system when the unique identifier from one file is matched to an entry in the opposing file and one or more of the remaining data points do not match. Verify the data discrepancies by selecting the existing value, creating new, or ignoring. A discrepancy type can also be selected from the dropdown. Once ALL have been verified click SAVE and then NEXT. Auditor comments can be added to Discrepancy Type / Note in the Auditor Notes field. Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

Verify Discrepancies

Verify the discrepancies below by selecting the correct value for each discrepancy. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details ▼

| First name | Last name | Relationship | 'base' row / data point | 'second' row / data point | Verified Value (Baseline value appears first) | Last Verified By | Discrepancy Type / Notes |
|------------|-----------|---------------------|-------------------------|---------------------------|---|------------------|--|
| Katherine | Aldridge | 4 / Monthly Premium | 4 / Monthly Premium | 4 / Monthly Premium | <input type="radio"/> 654.98 <input type="radio"/> 259.55 <input type="radio"/> Overwrite <input type="radio"/> Ignore | - | Discrepancy Type <input type="text"/> Auditor notes Premium not the same in carrier as the Ben Admin system.] Verifier notes <input type="text"/> |

If the discrepancy is not a true discrepancy or if the verifier desires to ignore it, select IGNORE. Any discrepancy marked as IGNORE, can be minimized by clicking the caret (^)

Verify Discrepancies

Verify the discrepancies below by selecting the correct value for each discrepancy. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details ▼

| First name | Last name | Relationship | 'base' row / data point | 'second' row / data point | Verified Value (Baseline value appears first) | Last Verified By | Discrepancy Type / Notes |
|------------|-----------|---------------------|-------------------------|--|---|------------------|---|
| Katherine | Aldridge | 4 / Monthly Premium | 4 / Monthly Premium | <input type="radio"/> 654.98 <input type="radio"/> 259.55 <input type="button" value="Overwrite"/> <input checked="" type="radio"/> Ignore ^ | | | Discrepancy Type <input type="text"/> Auditor notes <input type="text"/> Verifier notes <input type="text"/> |

| | | | | | | | |
|-----------|----------|---------------------|---------------------|-----------------------|--|--|--|
| Katherine | Aldridge | 4 / Monthly Premium | 4 / Monthly Premium | Ignore ▼ | | | |
|-----------|----------|---------------------|---------------------|-----------------------|--|--|--|

Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. **The Verifier Memo is automatically included in the email back to the Auditor.**

Rows per page: 5 1-2 of 2 < >

Verifier Memo ▼

BACK NEXT **OVERWRITE AS COMPLETE**

Verifier Memo ^

Verifier Memo

General purpose notes available to the assigned verifier, that (if a verifier is assigned) will be communicated back to the auditor via automated email.

Verify Missing

Verify Missing Data entries are identified by the system when the unique identifier from one file cannot be found in the other. If the entry needs to be included, check Include? For a shortcut, click INCLUDE ALL or EXCLUDE ALL to select/deselect all entries. If INCLUDE is selected, the entry will be included in the export files. Once the Verify Missing Data has been verified, click SAVE and then NEXT. Auditor comments can be added to Discrepancy Type / Notes in the

Auditor Notes field and a specific discrepancy type can be selected in the Discrepancy Type dropdown. Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

Verify Discrepancies

Verify the missing discrepancies below by selecting whether or not the missing records should be included or excluded in the verified output files. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details

| First name | Last name | Relationship | Unique Identifier | 'base' row | 'second' row | Duplicate unique identifier row | Verified Inclusion INCLUDE ALL EXCLUDE ALL | Last Verified By | Discrepancy Type / Notes |
|------------|-----------|--------------|---------------------|------------|--------------|---------------------------------|--|------------------|---|
| Julia | Benefits | | julia_benefits_1234 | 13 | | | <input type="radio"/> Include <input type="radio"/> Exclude | | Discrepancy Type Auditor notes Verifier notes |

Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.

Rows per page: 5 1-2 of 2

Verifier Memo

BACK NEXT OVERRIDE AS COMPLETE

Verifier Memo

Verifier Memo

General purpose notes available to the assigned verifier, that (if a verifier is assigned) will be communicated back to the auditor via automated email.

Assign a Verifier to the Compare

A verifier can be assigned to complete the comparison. To assign a verifier, select the Verifier Details dropdown. In the Verifier Details section, select the EDIT option for Assigned Verifier.

Verify Discrepancies

Verify the discrepancies below by selecting the correct value for each discrepancy. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details v

Verifier Details

| | |
|--|---|
| Assigned Verifier Unassigned ✎ EDIT | Auditor Memo ✎ EDIT |
| Setup Notes | Carrier |
| Audit Type | Created By / Auditor maryl |
| Comparison Type Compare + Merge | |

This will open up the comparison edit section. In the Assigned Verifier dropdown, select an applicable user. **An audit can be assigned to anyone who has access to the specific company and only to users with the same level access. For example, a Company Admin user can only assign an audit to other Company Admins or Company Verifiers within the same company. An Org Level user can assign to other users within the same organization and all company level users.**

A notification email containing Auditor name, Organization/Company Name, Audit Name, and a link to the specific audit is generated once a verifier has been assigned.

Hello {Verifier First Name},

{Auditor First Name and Last Name} at {Organization Name if Org Level or Company Name if Company Level User} has finished auditing your data and has designated you as the verifier for this comparison: {Comparison Name} for {Company Name}.

Please [click here](#) below to log in and complete the verification process for any discrepancies.

{Auditor Memo}

Thank you,

On behalf of {Auditor First Name and last Name}, {Organization Name if Org Level or Company Name if Company Level User}

This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

Edit Comparison

Comparison Name
Demo for User Guides

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Comparison Type
Compare Only

Created By / Auditor
maryl

Auditor Memo

General purpose auditor notes that will be communicated to the verifier (assigned below) via automated email.

Assigned Verifier

Verifier Memo

General purpose notes available to the email.

SAVE

Unassigned

companyverifier-dms

demobroker1

malanier2024

The notification email can be sent from either the Verify Discrepancy Step or the Verify Missing Data step.

A notification email can be resent if the audit has not reached the completion step (Step 8). To resend the notification email. Navigate to the Verifier Details and click EDIT for the Assigned Verifier. Click RESEND to resend the notification email to the currently assigned verifier.

Complete the form below to update this comparison's information.

Edit Comparison

Comparison Name
Demo - Compare and Merge

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Resend the notification email to the assigned verifier.

RESEND

Complete the Compare

Data verification is complete.

If the audit was assigned to a specific user within the application, the auditor will receive a notification email that the audit is complete.

Hello {Auditor First Name},

This is to inform you that the assigned verifier, {Verifier First Name and Last Name}, has finished verifying the discrepancies for your comparison: {Comparison Name} for {Company Name}.

Please [click here](#) below to log in and complete the audit process.

{Verifier Memo}

Thank you,

On behalf of {Verifier First Name and Last Name}, {Organization Name if Org Level or Company Name if Company Level User}

This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

The verified baseline and secondary files can be downloaded with all records including verified or verified records only by utilizing dropdown. If a discrepancy was ignored, the record **will not be included** in the Verified records only download. The ignored record will continue to show in the All records including verified download.

Complete

All discrepancies have been verified and this comparison is now completed! You may export the files containing the verified changes below.

Comparison Details

Select file to export

BACK GO TO ALL COMPARISONS

-- Select --

Base

Secondary

Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the application's key words. For a list of the keywords, please reference the Key Words page.

Select file to export
 Base

Customize Export - 'Base'

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. The merged indicator will only show for data points being merged into the selected export file. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

No applicable Export Templates

| Original Name | Rename To | Format Values | Merged |
|-----------------|----------------------|----------------------|--------|
| Employee SSN | <input type="text"/> | <input type="text"/> | |
| First Name | <input type="text"/> | <input type="text"/> | |
| Last Name | <input type="text"/> | <input type="text"/> | |
| DOB | <input type="text"/> | <input type="text"/> | |
| Gender | <input type="text"/> | <input type="text"/> | |
| Monthly Premium | <input type="text"/> | <input type="text"/> | |
| Date of Hire | <input type="text"/> | <input type="text"/> | |

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

Share with Organization

[SAVE CUSTOMIZATIONS](#)

EXPORT ALL RECORDS INCLUDING VERIFIED

EXPORT VERIFIED RECORDS ONLY

BACK

GO TO ALL COMPARISONS

Column names can also be reordered by dragging and dropping data point in desired location.

| | | | |
|-------------|--|----------------------|----------------------|
| Middle Name | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| | <div style="border: 2px solid red; padding: 5px; display: flex; align-items: center; gap: 10px;"> ☰ DOB 🔄 <input type="text"/> </div> | | |
| Last Name | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Click SAVE CUSTOMIZATIONS if desired. Customization is also automatically saved when the export files (All Records Including Verified and Verified Records Only) are downloaded.

A screenshot of a software interface for an audit task. At the top, there is a purple button labeled 'SAVE CUSTOMIZATIONS' which is highlighted with a red rectangular box. Below this, there are two more purple buttons: 'EXPORT ALL RECORDS INCLUDING VERIFIED' and 'EXPORT VERIFIED RECORDS ONLY'. At the bottom left, there are two grey buttons: 'BACK' and 'GO TO ALL COMPARISONS'. At the bottom right, there is a purple button labeled 'COMPLETE AUDIT TASK'.

If an audit was created through an **Audit Task**, Agency users can close the task directly from within the audit by selecting **COMPLETE AUDIT TASK**.

This reduces the need to navigate back to the Audit Task, streamlining the workflow.

A screenshot of the same software interface as above. In this version, the purple button labeled 'COMPLETE AUDIT TASK' at the bottom right is highlighted with a red rectangular box. The other buttons and layout remain the same.

Export Template

Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming and saving the template. Once the template has been saved, it will be added to the template library for future use.

Optionally, check SHARE WITH ORGANIZATION to add the template to the Organization Level Template library. **Any template shared with an organization and created by an organization administrator, or an organization compare user, can be utilized under any company within that specific organization. Company admins which are available under our Platinum Elite subscription will only have access to the templates that are created under their specific company.**

Selecting export template:

A screenshot of the 'Export Template' selection interface. At the top, there is a dropdown menu labeled 'Select file to export' with 'Base' selected. Below this is a section titled 'Customize Export - 'Base'' with an upward-pointing arrow. The section contains instructions: 'Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. Customizations will be saved once the file is exported, or by clicking Save Customizations below.' and 'Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.' At the bottom of this section, there is a text box containing the message 'No applicable Export Templates', which is highlighted with a red rectangular box.

Saving New Export Template:

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

Share with Organization

[SAVE CUSTOMIZATIONS](#)

[EXPORT ALL RECORDS INCLUDING VERIFIED](#) [EXPORT VERIFIED RECORDS ONLY](#)

[BACK](#) [GO TO ALL COMPARISONS](#)

The data comparison and verification processes are complete. To see other comparisons or to begin a new, click [GO TO ALL COMPARISONS](#).

Questions: Contact Support@dms-datavalidate.com

Company Verifier Process

Select company

Select the comparison to verify the audit.

The screenshot displays the 'ML: Demo Company' interface. It features a header with the company name and a welcome message. Below this, there are two main sections: 'Information' and 'Comparisons'. The 'Information' section includes fields for Company Name, Organization Name, Comparisons Count, Users Count, and Active status. The 'Comparisons' section lists several audit tasks, with the first one, 'Demo Audit 04.04.2024 Verify Discrepancies', highlighted by a red box.

| ML: Demo Company | |
|--------------------------------------|--|
| Welcome, companyverifier-dms! | |
| Information EDIT | Comparisons NEW |
| Company Name ML: Demo Company | Organization Name Data Management Solutions-DVP Internal Use |
| Comparisons Count 7 | Users Count 2 |
| Active Yes | |
| | → Demo Audit 04.04.2024 Verify Discrepancies |
| | → Compare and Merge Complete |
| | → Mappings on org level Compare |
| | → Demo Audit Complete |

Verify Discrepancies

Verify Discrepancy Data entries are identified by the system when the unique identifier from one file is matched to an entry in the opposing file and one or more of the remaining data points do not match. Verify the data discrepancies by selecting the existing value, creating new, or ignoring. Once ALL have been verified click SAVE and then NEXT. Auditor comments can be added to POST YOUR NOTES in the Auditor Notes field. Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

Verify Discrepancies

Verify the discrepancies below by selecting the correct value for each discrepancy. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details ▼

| First name | Last name | Relationship | 'Base' row / data point | 'Secondary' row / data point | Verified Value (Baseline value appears first) | Last Verified By | Post Your Notes |
|------------|-----------|--------------|-------------------------|------------------------------|---|------------------|---|
| Katherine | Aldridge | | 4 / Monthly Premium | 4 / Monthly Premium | <input type="radio"/> 654.98 <input type="radio"/> 259.55 <input type="radio"/> Overwrite <input type="radio"/> Ignore | -- | Auditor notes Premium not the same in carrier as the Ben Admin System. |

Verifier notes

If the discrepancy is not a true discrepancy or if the verifier desires to ignore it, select IGNORE. Any discrepancy marked as IGNORE, can be minimized by clicking the caret (^)

Verify Discrepancies

Verify the discrepancies below by selecting the correct value for each discrepancy. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details ▼

| First name | Last name | Relationship | 'Base' row / data point | 'Secondary' row / data point | Verified Value (Baseline value appears first) | Last Verified By | Post Your Notes |
|------------|-----------|--------------|-------------------------|------------------------------|--|------------------|--|
| | | | | | <input type="radio"/> Julia <input type="radio"/> JuliaAnne <input type="button" value="Overwrite"/> <input checked="" type="radio"/> Ignore ^ | - | Auditor notes <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> Verifier notes <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> |

Note: A red box highlights the 'Ignore' dropdown in the table row below, with an arrow pointing to the 'Ignore' option in the main interface above.

| | | | | | | | |
|----------|--|--|-----------------|-----------------|--------|--|--|
| Benefits | | | 13 / First Name | 13 / First Name | Ignore | | |
|----------|--|--|-----------------|-----------------|--------|--|--|

Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. **The Verifier Memo is automatically included in the email back to the Auditor.**

Rows per page: 5 1-2 of 2 < >

Verifier Memo ▼

BACK NEXT OVERRIDE AS COMPLETE

Verifier Memo ^

Verifier Memo

General purpose notes available to the assigned verifier, that (if a verifier is assigned) will be communicated back to the auditor via automated email.

Note: A red dashed arrow points from the 'Verifier Memo' dropdown to the memo input area.

Verify Missing

Verify Missing Data entries are identified by the system when the unique identifier from one file cannot be found in the other. If the entry needs to be included, check Include? For a shortcut, click INCLUDE ALL or EXCLUDE ALL to

select/deselect all entries. If INCLUDE is selected, the entry will be included in the export files. Once the Verify Missing Data has been verified, click SAVE and then NEXT. Auditor comments can be added to POST YOUR NOTES in the Auditor Notes field. Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

Verify Discrepancies

Verify the missing discrepancies below by selecting whether or not the missing records should be included or excluded in the verified output files. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details ▼

| First name | Last name | Relationship | Unique Identifier | 'Base' row | 'Secondary' row | Duplicate unique identifier row | Verified Inclusion | Last Verified By | Post Your Notes |
|------------|-----------|--------------|--------------------|------------|-----------------|---------------------------------|--|------------------|---|
| Tricia | Yang | | 0260_21722 0260 | 203 | | | <input type="radio"/> Include <input type="radio"/> Exclude | - | Auditor notes Please add to the export Verifier notes |

Rows per page: 5 ▼ 1-1 of 1

1/1 records have changes and need to be updated SAVE

BACK
NEXT

Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. [The Verifier Memo](#) is automatically included in the email back to the Auditor.

Rows per page: 5 ▼ 1-2 of 2 < >

Verifier Memo ▼

BACK
NEXT
OVERRIDE AS COMPLETE

Verifier Memo ▲

General purpose notes available to the assigned verifier, that (if a verifier is assigned) will be communicated back to the auditor via automated email.

Complete the Compare

Data verification is complete.

If the audit was assigned to a specific user within the Platform, the auditor will receive a notification email that the audit is complete.

Hello {Auditor First Name},

This is to inform you that the assigned verifier, {Verifier First Name and Last Name}, has finished verifying the discrepancies for your comparison: {Comparison Name} for {Company Name}.

Please [click here](#) below to log in and complete the audit process.

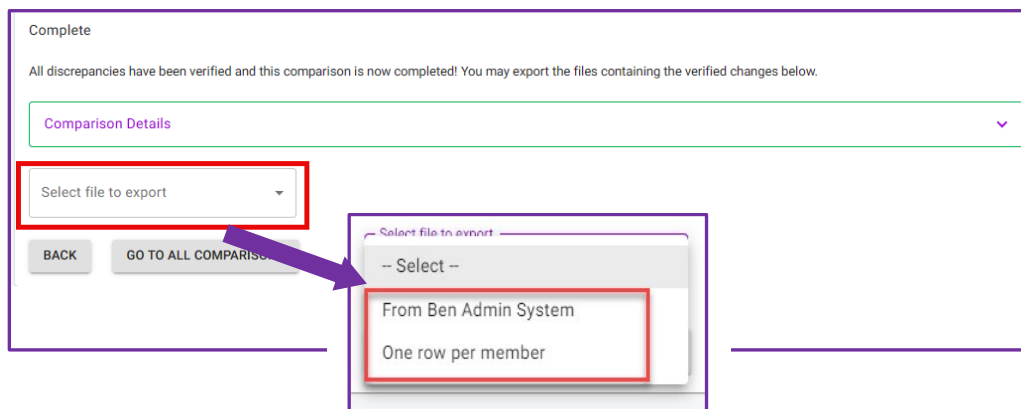
{Verifier Memo}

Thank you,

On behalf of {Verifier First Name and Last Name}, {Organization Name if Org Level or Company Name if Company Level User}

This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

The verified baseline and secondary files can be downloaded with all records including verified or verified records only by utilizing dropdown. If a discrepancy was ignored, the record **will not be included** in the Verified records only download. The ignored record will continue to show in the All records including verified download.



Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the Platforms key words. For a list of the keywords, please reference the Keys Words page.

Select file to export
Base

Customize Export - 'Base'

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

No applicable Export Templates

| Original Name | Rename To | Format Values |
|------------------------|----------------------|----------------------|
| Employee SSN | <input type="text"/> | <input type="text"/> |
| Social Security Number | <input type="text"/> | <input type="text"/> |
| First Name | <input type="text"/> | <input type="text"/> |
| Middle Name | <input type="text"/> | <input type="text"/> |
| Last Name | <input type="text"/> | <input type="text"/> |
| Display Name | <input type="text"/> | <input type="text"/> |
| DOB | <input type="text"/> | <input type="text"/> |
| Employment Status | <input type="text"/> | <input type="text"/> |
| Testing Scenario | <input type="text"/> | <input type="text"/> |
| Monthly Premium | <input type="text"/> | <input type="text"/> |

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

Share with Organization

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED **EXPORT VERIFIED RECORDS ONLY**

BACK **GO TO ALL COMPARISONS**

Column names can also be reordered by dragging and dropping data point in desired location.

| | | |
|----|-------------|----------------------|
| == | Middle Name | <input type="text"/> |
| ≡ | DOB | <input type="text"/> |
| == | Last Name | <input type="text"/> |

Click **SAVE CUSTOMIZATIONS** if desired. Customization is also automatically saved when the export files (All Records Including Verified and Verified Records Only) are downloaded.

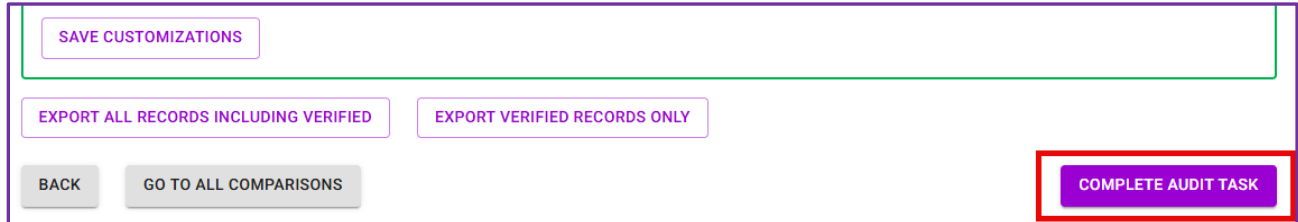
SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED **EXPORT VERIFIED RECORDS ONLY**

BACK **GO TO ALL COMPARISONS** **COMPLETE AUDIT TASK**

If an audit was created through an **Audit Task**, Agency users can close the task directly from within the audit by selecting **COMPLETE AUDIT TASK**.

This reduces the need to navigate back to the Audit Task, streamlining the workflow.



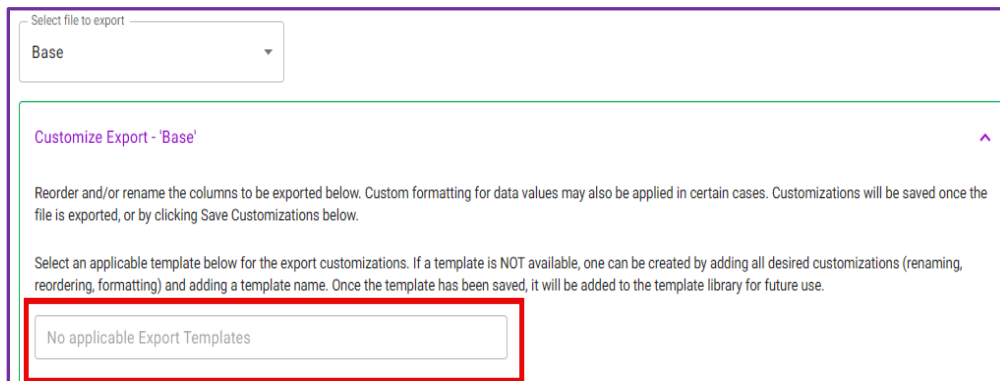
The screenshot shows a control panel with several buttons. At the top left is a purple button labeled 'SAVE CUSTOMIZATIONS'. Below it are two purple buttons: 'EXPORT ALL RECORDS INCLUDING VERIFIED' and 'EXPORT VERIFIED RECORDS ONLY'. At the bottom left are two grey buttons: 'BACK' and 'GO TO ALL COMPARISONS'. On the right side, there is a purple button labeled 'COMPLETE AUDIT TASK' which is highlighted with a red rectangular border.

Export Template

Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming and saving the template. Once the template has been saved, it will be added to the template library for future use.

Company admins which are available under our Platinum Elite subscription will only have access to the templates that are created under their specific company.

Selecting export template:



The screenshot shows a 'Customize Export' interface. At the top, there is a dropdown menu labeled 'Select file to export' with 'Base' selected. Below the dropdown is a section titled 'Customize Export - 'Base'' with a collapse icon. The section contains instructions: 'Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. Customizations will be saved once the file is exported, or by clicking Save Customizations below.' and 'Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.' At the bottom, there is a text box containing the message 'No applicable Export Templates', which is highlighted with a red rectangular border.

Saving New Export Template:

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

Share with Organization

[SAVE CUSTOMIZATIONS](#)

[EXPORT ALL RECORDS INCLUDING VERIFIED](#) [EXPORT VERIFIED RECORDS ONLY](#)

[BACK](#) [GO TO ALL COMPARISONS](#)

The data comparison and verification processes are complete. To see other comparisons, click **GO TO ALL COMPARISONS**.

Questions: Contact Support@dms-datavalidate.com

BenOps: Renewal Wizard

The Renewal Wizard in the Streamline application is a shared workspace where a General Agent (GA) can start a group's renewal and collaborate with designated Organization contact(s) to complete the renewal information checklist—covering items such as Open Enrollment dates and plan details.

Who Does What?

GA (General Agent) → Starts the renewal, reviews/approves, enters testing details, closes task.

Organization Contacts → Provides client information, completes plans checklist, tests, and approves the renewal to Go Live.

How It Works

Step 1: GA Initiates a Renewal

- GA logs into the **Streamline application**.
- Navigate to the company with the upcoming renewal.
- Click **Carriers & Renewals** → **New** under the Renewal section.

The screenshot displays the Streamline application interface. On the left, a navigation menu includes 'Reports', 'Agency', 'ORGANIZATION', 'Data Management Solutions', 'Companies', 'Comparisons', 'Mappings', 'Templates', 'Reports', 'Users', 'COMPANY', 'A Touch of Pink Bakery', 'Comparisons', 'Mappings', 'Templates', 'Users', 'Carriers & Renewals' (highlighted with a red box), and 'Convert Carrier Files'. The main content area is divided into three sections: 'Carriers', 'Renewals', and a 'NEW' button. The 'Carriers' section contains a table with the following data:

| Carrier | Group Number | Renewal Month | Active |
|-----------------------------------|--------------|---------------|--------|
| ADMIN AMERICA | 7841 | November | Yes |
| AMERITAS GROUP | AMG-123 | December | Yes |
| ANTHEM BLUE CROSS BLUE SHIELD | 9874 | December | Yes |
| BLUE CROSS BLUE SHIELD | BC 784 | November | Yes |
| BRIGHT BENEFITS | 789522 | January | Yes |
| LIBERTY UNION LIFE ASSURANCE C... | M987ZZ | November | Yes |

The 'Renewals' section shows a list of renewal tasks with a 'NEW' button highlighted in a red box. The tasks listed are:

- 2025, January Client Information
- 2025, November Completed
- 2025, December Completed
- 2026, November Review Demo Environment
- 2026, December Live

- Select the **Renewal Month** and **Renewal Beginning Plan Year**, then click **Save**.

New Renewal

Renewal Month ▼

Renewal Beginning Plan Year ▼

SAVE

- An **automated email** notifies the designated Primary and Secondary Organization that a renewal has been created. The designated GA Renewal Contact will also receive this email.

BBS: Renewal Notification. You have been assigned to Full Stack Pancake Diner renewal: 2025, July. Please complete step: Client Information and Plans Checklist - Initial

N notifications@dms-datavalidate.com ← ↶ ↷ → 🗪 ⋮
To: You Thu 10/23/2025 9:46 AM

Hello [REDACTED]

The 2025, July renewal for your client, Full Stack Pancake Diner, is quickly approaching. To ensure their employee benefits enrollment portal is ready for re-enrollment, a few key steps require your attention.


Please [click here](#) to log in and complete both the Client Information and Renewal Plans Checklist.


Within the portal, you can upload all relevant plan materials, including (but not limited to) plan documents, rate sheets, and notes on any plan changes.

The client information and plans checklist should be completed at least 10 business days before your desired site open date. Updating plans for renewal, which also includes our internal QA process, takes approximately 5-7 business days. After our internal QA is complete, this allows an additional 1-2 business days for your review and feedback before the site is made available to employees.

We look forward to partnering with you to ensure a smooth and timely renewal for Full Stack Pancake Diner. If this request should be directed to another contact, please provide their information in the comments. We'll be happy to reassign the task accordingly.

Thank you,
on behalf of Mary Lanier, Broker Builder Solutions | Data Management Solutions

 **Broker Builder Solutions**
Your Trusted Partner for Benefits Administration

 **Data Management Solutions**
Validate • Create • Convert

Note: Organization contacts and GA Renewal Contact can be found on the Company Detail page.

Information ✎ EDIT

| | |
|--|---|
| <p>Company Name Fire Solutions Data Management</p> <p>Comparisons Count 2</p> <p>Carriers Count 1</p> <div style="border: 2px solid red; padding: 2px; margin-bottom: 5px;"> <p>Primary Org Contact marytester (Mary Lanier)</p> </div> <p>Primary Org Contact Phone</p> <div style="border: 2px solid red; padding: 2px; margin-bottom: 5px;"> <p>GA Renewal Contact mlanier (Mary Lanier)</p> </div> <p>Notes</p> | <p>Organization Name Data Management Solutions: Testing</p> <p>Users Count 3</p> <p>Active Yes</p> <p>Primary Org Contact Email</p> <div style="border: 2px solid red; padding: 2px; margin-bottom: 5px;"> <p>Secondary Org Contact</p> </div> <p>GA Renewal Contact Email support@dms-datavalidate.com</p> |
|--|---|

Step 2: Organization Completes Client Information

- The Organization will receive a Renewal Kickoff email outlining the next required actions. This email includes a link that, once logged into the application, allows the Organization user to easily access the renewal and begin **Step 1: Client Information**.
- If the Organization wants to take the lead instead of the GA, they can choose Broker Managed and assign an organization contact from the dropdown.
- The user will then complete the Required fields:
 - **Enrollment Start Date** – date the open enrollment is open to the employees
 - **Open Enrollment End Date** - date the open enrollment closes for the employee
 - **Administration End Date** – date the open enrollment closes for admin users such as the HR team or Benefits Administrator
 - **Enrollment Type (Active/Passive)**

- Optional (recommended) fields:
 - COBRA Enrollment Type (Active/Passive)
 - Passive Enrollment Button Enabled (Before, After, Both)
 - Send Deductions Date (if payroll integration is present)
 - Custom Enrollment Welcome & Email Language
 - Comments – **Please note that a comment can be added without submitting the Client Information for GA Review. The comment can also be marked as an Internal Comment and restricted to GA user view only.**

The screenshot shows a text input area for adding a comment. At the top, it says "Add a comment if you'd like to provide any additional context or information." Below this is a rich text editor toolbar with options for Paragraph, Bold (B), Italic (I), Bulleted List, and Numbered List. A large empty text box is provided for the comment. At the bottom of the form, there is a checkbox labeled "GA Internal Comment", which is highlighted with a red rectangular border.

- Close Renewal
- Click **Submit Client Information** → GA is notified for review.

Note: The **Close** and **Delete Renewal** options are available only on the **Client Information** step of the Renewal Wizard.

The **Close** option is designed for renewals marked as *Broker Managed*. It allows agents to close a renewal without completing the remaining steps, preventing any additional email notifications that would typically be triggered later in the process.

Once a renewal is closed:

- It will appear in the renewal list with a **Closed** status instead of **Completed**
- Only **Agency users** have permission to perform this action
- The renewal **cannot be reopened**

If a renewal was created in error, it can be deleted after being closed. Deleting a renewal will:

- Permanently remove it from the carrier page renewal list
- Prevent it from being recovered

Client Information

Complete the form below to submit information for this renewal to the GA Renewal Contact for review.

Broker Managed Details

If the Agency Contact is not managing this renewal please select the Broker Managed checkbox below and optionally select the user who will be managing this renewal.

Broker Managed

Enrollment Start Date



Enrollment End Date



Administration End Date



Enrollment Type



COBRA Enrollment Type



Passive Enrollment Button Enabled



Send Deductions Date



Applicable for payroll integrations

Enrollment Welcome Language

If welcome language varies by classification please specify for each

Enrollment Email Language

If email language varies by classification please specify for each

Comments



SKIP

SUBMIT CLIENT INFORMATION

CLOSE RENEWAL

Step 3: Organization Completes Plans Checklist

- For each listed plan click the **Plan Name** or **Status** to review:

Plans Checklist

Each plan requires it's renewal details to be submitted before the entire plans checklist can be submitted to the GA Renewal Contact for review.

! If a new plan needs to be added please indicate in the comments when submitting the plans checklist.

Comments ▼

SUBMIT PLANS CHECKLIST

| Plan Name | Carrier | Benefit Type | Status | Renewing? |
|--------------------------------|---------------|--------------|---------------|-----------|
| 2025 DENTAL HIGH | Admin America | Dental | ! IN PROGRESS | |
| 2025 MEDICAL OPTION 2-PPO PLAN | Admin America | Dental | ! IN PROGRESS | |

- If **not renewing** →
 - Select **NO** and add additional information to the General Plan Renewal Notes and/or Comments to indicate if the carrier is being replaced by another or any other pertinent information for the GA contact.
 - Click **Submit Plan Information** (status changes to Submitted).

Plan Name
2025 Dental High (Admin America) ▼

Plan Details ▼

Renewal Details ^

Is this plan renewing? ▼
 No

General Plan Renewal Notes

Comments ▼

BACK

SUBMIT PLAN INFORMATION

- If **renewing** →

- Answer additional questions for the rates, rounding, limits, contributions section, and the eligibility section.
- Upload supporting documents as needed
- Add additional pertinent information in the Comment section

The screenshot shows a web form titled "Renewal Details" with a purple border. The form is divided into several sections, each with a green border and a dropdown arrow in the top right corner. The sections are: 1. "Is this plan renewing?" with a dropdown menu showing "Yes". 2. "General Plan Renewal Notes" with a yellow border and a text input area. 3. "General Plan Documents" with a blue border, containing the text "No General Plan Documents found." and a purple "ADD FILE" button with a cloud icon. 4. "Are Rates, Rounding, Contributions, or Plan Limits Changing?" with a dropdown menu. 5. "Rates, Rounding, Contributions, or Plan Limits Changing Notes" with a yellow border and a text input area. 6. "Rates, Rounding, Contributions, or Plan Limits Documents" with a blue border, containing the text "No Rates, Rounding, Contributions, or Plan Limits Documents found." and a purple "ADD FILE" button with a cloud icon. 7. "Is eligibility changing?" with a dropdown menu. 8. "Eligibility Changing Notes" with a yellow border and a text input area. 9. "Eligibility Documents" with a blue border, containing the text "No Eligibility Documents found." and a purple "ADD FILE" button with a cloud icon. At the bottom of the form, there is a "Comments" section with a dropdown arrow, a grey "BACK" button, and a purple "SUBMIT PLAN INFORMATION" button.

- Click **SUBMIT PLAN INFORMATION** once all selections have been made for the specific plan.

- Repeat the process above for each plan listed until all statuses have been changed from IN PROGRESS to SUBMITTED.

Plans Checklist

Each plan requires it's renewal details to be submitted before the entire plans checklist can be submitted to the GA Renewal Contact for review.

! If a new plan needs to be added please indicate in the comments when submitting the plans checklist.

Comments

SUBMIT PLANS CHECKLIST

| Plan Name | Carrier | Benefit Type | Status | Renewing? |
|--------------------------------|---------------|--------------|---------------|-----------|
| 2025 DENTAL HIGH | Admin America | Dental | ✓ SUBMITTED | Yes |
| 2025 MEDICAL OPTION 2-PPO PLAN | Admin America | Dental | ! IN PROGRESS | |

- Once all plans are submitted, click **Submit Plans Checklist** → GA is notified by an email.

Plans Checklist

Each plan requires it's renewal details to be submitted before the entire plans checklist can be submitted to the GA Renewal Contact for review.

! If a new plan needs to be added please indicate in the comments when submitting the plans checklist.

Comments

SUBMIT PLANS CHECKLIST

| Plan Name | Carrier | Benefit Type | Status | Renewing? |
|--------------------------------|---------------|--------------|-------------|-----------|
| 2025 DENTAL HIGH | Admin America | Dental | ✓ SUBMITTED | Yes |
| 2025 MEDICAL OPTION 2-PPO PLAN | Admin America | Dental | ✓ SUBMITTED | Yes |

Step 4: GA Reviews & Collaborates

- GA will receive an email when the Organization contact completes the Client Information and/or Plans Checklist.
 - GA Review Client Information – Approval**

After the organization contacts have entered all required information, and no further details are needed, the GA should add any desired comments and then click **APPROVE CLIENT INFORMATION**.

- **GA Review Client Information – Request Changes**

If additional information or clarification is needed, the GA should add a comment and then click **REQUEST CHANGES**. This will send an email with the comment to the organization contacts

- **GA Review Plans Checklist – Approval**

For each listed plan, click the Plan Name or Status to review.

REQUEST CHANGES TO PLANS CHECKLIST

| Plan Name | Carrier | Benefit Type | Status | Renewing? |
|--------------------------------|---------------|--------------|-------------|-----------|
| 2025 DENTAL HIGH | Admin America | Dental | ! GA REVIEW | Yes |
| 2025 MEDICAL OPTION 2-PPO PLAN | Admin America | Dental | ! GA REVIEW | Yes |

If all required information and documents have been provided by the organization contacts and no further details are needed, the GA should add any desired comments and then click **APPROVE PLAN INFORMATION**.

- **GA Review Plans Checklist – Request Changes**

If additional information or clarification is needed, the GA should add a comment and then click **REQUEST CHANGES**. This will send an email with the comment to the organization contacts

- When all plans have been approved, click **APPROVE PLANS CHECKLIST**.

- Collaboration continues until both steps are approved.

Steps 5 & 6: Testing & Go Live

- Once the Client Information and the Plans Checklist have been approved, it is time to set up the Demo Environment in the Benefit Administration System. On Step 5, the GA enters **testing details** such as demo users and instructions in the Demo Environment Notes section as well as any additional comments or files and then clicks SUBMIT DEMO ENVIRONMENT INFORMATION.

GA Setup Demo Environment

Please provide the demo environment information below and submit it for review by the Organization Contacts.

Demo Environment Notes

Comments

SUBMIT DEMO ENVIRONMENT INFORMATION

- Organization is notified by automated email and begins testing in the **Benefit Administration System**.
- Request Changes:
 - If changes are needed, the Organization user will add a comment and/or files requesting the change to the Benefit Administration system and click **Request Change**.
- After successful testing:
 - Organization checks all acknowledgment boxes if all testing was successful.

- Clicks **Go Live** (button activates only when all boxes are checked).

Review Demo Environment

The Organization Contacts will review the submitted demo environment information below and either approve or request changes.

Demo Environment Information

Demo Environment Notes

Demo Users:
username: Demo
password: Testing

Please check that all plans are visible with correct rates.

Demo Environment Review Checklist

The following items must be reviewed and verified before the demo environment can be approved and the Go Live button becomes available. If there is an issue with any of the below items please use the comments section to provide details and request changes.

- Are the benefit plans associated with each class and/ or business unit showing in the open enrollment engine?
- Do ALL employee per pay deductions reflect as expected in the open enrollment engine (Medical, Dental, Flex, Voluntary Life, Voluntary STD, Voluntary LTD, etc...?)
- Do the plan limits for any applicable H.S.A, FSA, Limited Purpose FSA, Parking, Transit, or Dependent Care FSA reflect as expected?
- Do all plan documents associated with each plan reflect as expected?
- Does all plan communication language reflect as expected?
- Are all onboarding/employee tasks showing as expected (if applicable)?
- Are all required demographic fields showing as expected for employees and dependents?

Comments

GO LIVE REQUEST CHANGES

Demo Environment Review Checklist

The following items must be reviewed and verified before the demo environment can be approved and the Go Live button becomes available. If there is an issue with any of the below items please use the comments section to provide details and request changes.

- Are the benefit plans associated with each class and/ or business unit showing in the open enrollment engine?
- Do ALL employee per pay deductions reflect as expected in the open enrollment engine (Medical, Dental, Flex, Voluntary Life, Voluntary STD, Voluntary LTD, etc...?)
- Do the plan limits for any applicable H.S.A, FSA, Limited Purpose FSA, Parking, Transit, or Dependent Care FSA reflect as expected?
- Do all plan documents associated with each plan reflect as expected?
- Does all plan communication language reflect as expected?
- Are all onboarding/employee tasks showing as expected (if applicable)?
- Are all required demographic fields showing as expected for employees and dependents?

Comments

GO LIVE **REQUEST CHANGES**

Step 7: Renewal Completion

- Once live, the renewal is **locked**—previous steps cannot be reopened.
- Post-Go Live:

Organization Contacts: The renewal is complete, and no further action is required. However, if changes are requested after the renewal has gone live, the organization may still add comments or upload documents linked to specific plans.

Renewal: 2025, October

[Fire Solutions Data Management](#) / [Renewals](#) / 2025, October - Live


- Client Information
- Plans Checklist
- GA Review Client Information
- GA Review Plans Checklist
- GA Setup Demo Environment
- Review Demo Environment
- Live

Live

This renewal is marked to go live! You can view the details of this renewal by viewing the information on the prior steps.

If you have any questions, or need to make changes or upload documents pertaining to this renewal, please submit a comment with this information below.

Comments



The screenshot shows a task interface with a checklist at the top: Client Information, Plans Checklist, GA Review Client Information, GA Review Plans Checklist, GA Setup Demo Environment, Review Demo Environment, and Live. Below the checklist, the 'Live' status is confirmed with a message: 'This renewal is marked to go live! You can view the details of this renewal by viewing the information on the prior steps.' A comment section is highlighted with a red box, containing a text area with a rich text editor (Paragraph, Bold, Italic, Bulleted List, Numbered List) and a dropdown menu for selecting a Plan. Below the comment section is an 'Attachments' area with an 'ADD FILE' button. At the bottom, a 'SUBMIT COMMENT' button is also highlighted with a red box.

- GA closes the renewal task in the system. **Please notice that the Complete & Close Task is only available on the GA Contact access.**

The screenshot shows a task interface for 'Renewal: 2025, October'. The breadcrumb trail is 'Fire Solutions Data Management / Renewals / 2025, October - Live'. The checklist at the top is identical to the previous screenshot, with all items checked. Below the checklist, the 'Live' status is confirmed with a message: 'This renewal is marked to go live! You can view the details of this renewal by viewing the information on the prior steps.' A comment section is visible with a dropdown arrow. At the bottom right, a 'COMPLETE & CLOSE TASK' button is highlighted with a red box.

- A **final closeout email** is sent, marking the renewal complete and ready for the next cycle.

✓ With this new Renewal Wizard, GAs and Organizations have a streamlined, collaborative, and transparent process to ensure smooth renewals every year.

Companies Table for Renewals

We've added a new feature to the Companies table at the organization level. A new column now displays whether a company has an active renewal in progress.

The screenshot shows a web application interface for 'Data Management Solutions'. The left sidebar contains navigation options: 'ORGANIZATION' (highlighted with a red box), 'Companies' (highlighted with a red box), 'Comparisons', 'Mappings', 'Templates', 'Reports', 'Eligibility Management', and 'Users'. The main content area is titled 'Companies' and displays a table with the following data:

| Company Name | In Renewal | Org Contact 1 | Org Contact 2 |
|--------------------------------|------------|---------------|---------------|
| ABC COMPANY | ✓ | malanier2024 | malanier2024 |
| A TOUCH OF PINK BAKERY | ✓ | malanier2024 | |
| BRITTANY DEMO | ✓ | brokerverfier | |
| CARLA DEMO | ✓ | brokerverfier | |
| CAULIFLOWER TESTING (INACTIVE) | | | |
| CITY OF BRIDGERTON (INACTIVE) | | | |
| DECEMBER DEMO COMPANY | ✓ | brokerverfier | |
| DEMO COMP-08082024 (INACTIVE) | | | |

The 'In Renewal' column is highlighted with a red box, indicating that companies with a green checkmark have an active renewal in progress. The table also includes 'FILTERS' and 'EXPORT' options at the top, and a pagination indicator '1-8 of 29' at the bottom right.

Eligibility Management Tracking

The Eligibility Management Tracking module is designed to streamline and record all manual enrollment handling activities. This module supports tracking for recurring eligibility management, open enrollment (OE) manual processing and carrier error reports.

To ensure complete visibility, users can log the method of processing, timeframes, assigned staff, and relevant enrollment counts.

Creating a new Eligibility Management Task is straightforward, but there are a few rules to keep in mind. **Tasks can only be created by an Agency User** and may be created at **three levels**:

- **Organization level**
- **Company Level**
- **Company Carrier level**

Tasks **cannot** be created at the Agency level, although they **can be viewed and exported** there.

Eligibility Management Tracking Tables:

Agency:

The screenshot shows the 'Eligibility Management' interface. On the left is a sidebar with navigation options: AGENCY, Organizations, Reports, Carriers & Plans, Renewals, Renewal Planning, Eligibility Management (highlighted with a red box), Support Tasks, Audit Tasks, Email Templates, and Agency. The main content area is titled 'Eligibility Management' and includes the BENOPS logo. Below the title, it states: 'The table below shows all of the eligibility management tasks that have been created under your agency.' A table titled 'Eligibility Management Tasks' is displayed with columns: Organization, Company, Carrier Name, Task Name, Changes Date Range, and Task T. The table contains five rows of data.

| Organization | Company | Carrier Name | Task Name | Changes Date Range | Task T |
|----------------|------------------|-------------------------------|------------------------------|--------------------|--------|
| DATA MANAGE... | A TOUCH OF PI... | BLUE CROSS BLUE SHIELD | FILE FAILED | (n/a) | Issue |
| DATA MANAGE... | ABC COMPANY | BLUE CROSS BLUE SHIELD OF ... | JSDF;LKASJDF;LJAS;KDLFJ;A... | (n/a) | Issue |
| DATA MANAGE... | ACME COMPANY | GUARDIAN | ISSUES FOR 03/19/2026 | (n/a) | Issue |
| DATA MANAGE... | WHAT'S THIS ... | GUARDIAN | TESTING REASSIGN AND COM... | (n/a) | Issue |
| DATA MANAGE... | A TOUCH OF PI... | BLUE CROSS BLUE SHIELD | EMT ISSUE 1 | (n/a) | Issue |

Organization:

ORGANIZATION

DM

- Data Management Solutions
- Companies
- Comparisons
- Mappings
- Templates
- Reports
- Tasks
- Eligibility Management
- Support Tasks
- Audit Tasks
- Users

Eligibility Management

Data Management Solutions / Eligibility Management

NEW

Eligibility Management Tasks

[FILTERS](#) [EXPORT](#)

| Company | Carrier Name | Task Name | Changes Date Range | Task Type |
|------------------|-------------------------------|-----------------------------|--------------------|-----------|
| A TOUCH OF PL... | BLUE CROSS BLUE SHIELD | FILE FAILED | (n/a) | Issue |
| ABC COMPANY | BLUE CROSS BLUE SHIELD OF ... | JSDFLKASJDF;LJAS;KDLFJ;A... | (n/a) | Issue |
| ACME COMPANY | GUARDIAN | ISSUES FOR 03/19/2026 | (n/a) | Issue |
| WHAT'S THIS ... | GUARDIAN | TESTING REASSIGN AND COM... | (n/a) | Issue |
| A TOUCH OF PL... | BLUE CROSS BLUE SHIELD | EMT ISSUE 1 | (n/a) | Issue |
| A TOUCH OF PL... | BLUE CROSS BLUE SHIELD | ISSUE I@##\$ | (n/a) | Issue |
| A TOUCH OF PL... | BLUE CROSS BLUE SHIELD | TESTING 03.17.2026 | (n/a) | Issue |

Company:

COMPANY

AT

- Data Management Solutions
- Companies
- Comparisons
- Mappings
- Templates
- Reports
- Tasks
- Eligibility Management
- Support Tasks
- Audit Tasks
- Convert Carrier Files
- Users

Eligibility Management

A Touch of Pink Bakery / Eligibility Management

NEW

Eligibility Management Tasks

[FILTERS](#) [EXPORT](#)

| Carrier Name | Task Name | Changes Date Range | Task Type | Processing/Err |
|------------------------|---------------------------|--------------------|-----------|------------------|
| BLUE CROSS BLUE SHIELD | FILE FAILED | (n/a) | Issue | File Transmiss |
| BLUE CROSS BLUE SHIELD | EMT ISSUE 1 | (n/a) | Issue | File Transmiss |
| BLUE CROSS BLUE SHIELD | ISSUE I@##\$ | (n/a) | Issue | File Structure U |
| BLUE CROSS BLUE SHIELD | TESTING 03.17.2026 | (n/a) | Issue | File Transmiss |
| BLUE CROSS BLUE SHIELD | OR USER 03.17.2026 | (n/a) | Issue | File Structure U |
| BLUE CROSS BLUE SHIELD | SKLDFJALKSJDFKASJDFLKA... | (n/a) | Issue | File Transmiss |
| BLUE CROSS BLUE SHIELD | WHAT IN THE WORLD!!! | (n/a) | Issue | |
| BLUE CROSS BLUE SHIELD | BCBS FILE ERROR | (n/a) | Issue | File Transmiss |

1-8 of 25 < >

Company Carrier Level:

The screenshot displays the 'Blue Cross Blue Shield' carrier information page. The breadcrumb path 'A Touch of Pink Bakery / Carriers / Blue Cross Blue Shield' is highlighted in red. The left sidebar shows the 'Carriers & Renewals' menu item highlighted in red. The main content area includes a 'Carrier Information' card with the following details:

| | | | |
|---------------------------------|-----------------------------------|------------------------------|--------|
| Carrier | Blue Cross Blue Shield | Group Number | 123456 |
| Renewal Kickoff Days In Advance | 45 | Carrier Invoice Day Of Month | 15 |
| Eligibility Management Type | Agency Managed Manual Eligibility | Disable Renewals | No |
| Active | Yes | Audit Service | No |

Below the carrier information is a 'Carrier Plans' table with the following data:

| Plan Name | Benefit | Eligibility Management Type |
|---------------------|---------------------|------------------------------|
| BLUE OPTIONS PLAN 1 | Medical | Agency Managed Manual Eli... |
| HP | Group Long Term ... | Agency Managed Manual Eli... |
| SDASDASDASD | Group Long Term ... | Agency Managed Manual Eli... |

The 'Eligibility Management Tasks' section at the bottom features a 'NEW' button highlighted in red.

The fields presented will vary slightly depending on where the task is created and what task is selected.

- When created at the **organization level**, you will need to manually select both the company and the carrier.
- When created at the **company level**, the company is pre-populated for you.
- When created at the **company carrier level**, the company and carrier information is pre-populated for you.

How It Works

Creating a Task at the Organization Level

1. **Navigate to the organization or company** where the task will be created.
2. Select **Eligibility Management** from the left menu under **TASKS**, then click **NEW**.

The screenshot shows the 'Eligibility Management' page. On the left is a sidebar with navigation options: ORGANIZATION, Data Management Solutions, Companies, Comparisons, Mappings, Templates, Reports, Tasks, Eligibility Management (highlighted), Support Tasks, Audit Tasks, and Users. The main content area is titled 'Eligibility Management' and contains a table of 'Eligibility Management Tasks'. A 'NEW' button is visible in the top right corner of the table area.

| Company | Carrier Name | Task Name | Changes Date Range | Task Type |
|------------------|-------------------------------|------------------------------|--------------------|--------------|
| ABC COMPANY | AIG - AMERICAN GENERAL | ASDSFDGFDVADFASDFASHJK... | (n/a) | Error Report |
| A TOUCH OF PI... | BLUE CROSS BLUE SHIELD | FILE FAILED | (n/a) | Issue |
| ABC COMPANY | BLUE CROSS BLUE SHIELD OF ... | JSDF;LKASJDF;LJAS;KDLFJ;A... | (n/a) | Issue |
| ACME COMPANY | GUARDIAN | ISSUES FOR 03/19/2026 | (n/a) | Issue |
| WHAT'S THIS ... | GUARDIAN | TESTING REASSIGN AND COM... | (n/a) | Issue |
| A TOUCH OF PI... | BLUE CROSS BLUE SHIELD | EMT ISSUE 1 | (n/a) | Issue |
| A TOUCH OF PI... | BLUE CROSS BLUE SHIELD | ISSUE !@##\$ | (n/a) | Issue |

Company & Carrier Selection

- Choose the **company** from the dropdown if creating on the organization level. If the task is created on company level, the company will be preselected.
- Choose the **carrier** for that company.

If you see the highlighted message indicating the eligibility type is not supported, the type must be updated before a task can be created. This typically indicates that the field is blank.

The screenshot shows the 'New Eligibility Management Task' form. It has two dropdown menus: 'Company' (selected: A Touch of Pink Bakery) and 'Carrier' (selected: Liberty Union Life Assurance Company). Below the dropdowns, a red-bordered box contains the following message: 'There are no available tasks to create for carrier: Liberty Union Life Assurance Company with eligibility management type: n/a. [Click here](#) to view or edit the eligibility management type for this carrier.'

Select the Eligibility Management Task Type

Choose from the dropdown:

1. **Recurring Enrollment Processing** – for tasks performed on a set schedule (e.g., weekly updates).
2. **Open Enrollment Processing** – for tasks related to once-per-plan-year OE changes.
3. **Error Report** – for tasks related to error reports received from carriers as a result of submitted files.
4. **Issue** – for tasks related to carrier files such as file transmissions, or file mapping issues

New Eligibility Management Task

[ABC Company](#) / [Carriers](#) / [AIG - American General](#) / New Eligibility Management Task

New Eligibility Management Task

Company

Carrier

Eligibility Management Task Type

Recurring Enrollment Processing

Open Enrollment Processing

Error Report

Issue

Required Fields for Creating an Enrollment Processing Task

NAME: Enter a unique task name (required per company).

Best practice is to include both the **carrier's name** and the **date range** of the changes or other information to create a unique name that is not repeatable for the specific company.

Examples:

- *Blue Cross: Weekly 12/15/25 – 12/21/25*
- *Blue Cross: November 2025 OE*

ASSIGNEE: Select the user responsible for completing the task.

The assigned user will receive an email notification indicating that a new task has been assigned to them, along with a direct link to the task so they can access it without navigating through the application. If the assignee is changed after the task has been created—but before it is completed—the newly assigned user will also receive an email notification.

Note: The assignee may be changed after creation, but not after task completion.

CHANGES FROM DATE: Enter or select the beginning date of the change window.

Example: For changes from 12/15/2025 to 12/21/2025, the “From Date” is **12/15/2025**.

CHANGES TO DATE: Enter or select the ending date of the change window.

Example: **12/21/2025**

***** If open enrollment changes, the changes from and to ARE OPTIONAL. However, it is recommended to use the first day of the new plan year. Example: November 2025 open enrollment will reflect 11/01/2025 as both the from and to date.**

A form with four input fields. The first field is labeled 'Name'. The second field is labeled 'Assignee' and has a dropdown arrow. The third field is labeled 'Changes From Date' and has a calendar icon. The fourth field is labeled 'Changes To Date' and has a calendar icon.

Processing Type

Choose how the changes were processed:

1. **Carrier Portal** – changes keyed directly in the carrier portal
2. **Email** – changes submitted in the body of an email
3. **Spreadsheet** – changes submitted via an attached spreadsheet
4. **Other** – any method not covered above

A dropdown menu titled 'Processing Type'. The menu is open, showing four options: 'Carrier Portal', 'Email', 'Spreadsheet', and 'Other'. The 'Carrier Portal' option is highlighted with a red border.

Required Counts for Completion:

These fields are required for all processing types.

The task may be saved with these fields blank, but **cannot be completed** until they are filled in.



1. **Changed Enrollment Count** – number of enrollment changes; enter **0** if none
2. **Verified Enrollment Count** – number of items verified; enter **0** if none

3. Demographic Changes Count – number of demographic-only changes; enter 0 if none


| |
|---------------------------|
| Changed Enrollment Count |
| Verified Enrollment Count |
| Demographic Changes Count |

Additional Required Fields for Completion (If Processing Type is NOT Carrier Portal):

- **Processing Submitted Date** – date changes were sent to the carrier or responsible party
- **Processing Confirmed Date** – date confirmation was received that changes were processed

| | |
|---------------------------|---|
| Processing Submitted Date |  |
| Processing Confirmed Date |  |

If a spreadsheet was used, upload it via **ADD FILES**.

| |
|---|
| Upload Files |
|  ADD FILE |

Required Fields for Creating an Error Report Task

NAME: Enter a unique task name (required per company).

Best practice is to include both the **carrier's name** and the **date range** of the changes or other information to create a unique name that is not repeatable for the specific company.

Examples:

- *Blue Cross: Weekly 12/15/25 – 12/21/25*
- *Blue Cross: November 2025 OE*

ASSIGNEE: Select the user responsible for completing the task.

The assigned user will receive an email notification indicating that a new task has been assigned to them, along with a direct link to the task so they can access it without navigating through the application. If the assignee is changed after the task has been created—but before it is completed—the newly assigned user will also receive an email notification.

Note: The assignee may be changed after creation, but not after task completion.

Additional Required Fields for Completion:

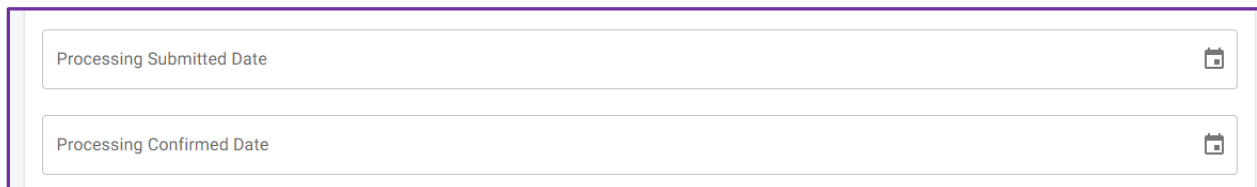
ERROR REPORT RECEIPT TYPE: Select how the error report was provided.

ERROR REPORT RECEIVED DATE: Select when the error report was received.

ERROR RECEIVED: Select Yes or No to indicate that the carrier error report contained errors.

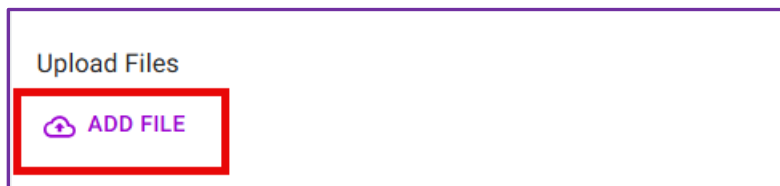
Processing Submitted Date – date error resolutions were sent to the carrier or responsible party

Processing Confirmed Date – date error resolution confirmation was received



The image shows two date selection fields stacked vertically. The top field is labeled 'Processing Submitted Date' and the bottom field is labeled 'Processing Confirmed Date'. Both fields have a small calendar icon on the right side, indicating they are date pickers.

If a spreadsheet was used, upload it via **ADD FILES**.



The image shows a section titled 'Upload Files'. Below the title is a button with a cloud icon and the text 'ADD FILE'. The button is highlighted with a red rectangular box.

Required Fields for Creating an Issue Task

NAME: Enter a unique task name (required per company).

Best practice is to include both the **carrier's name** and the **date of the issue** or other information to create a unique name that is not repeatable for the specific company.

ASSIGNEE: Select the user responsible for completing the task.

ISSUE TYPE: Select the issue for this task.

If supporting files or documentation is available, upload it via **ADD FILES**.



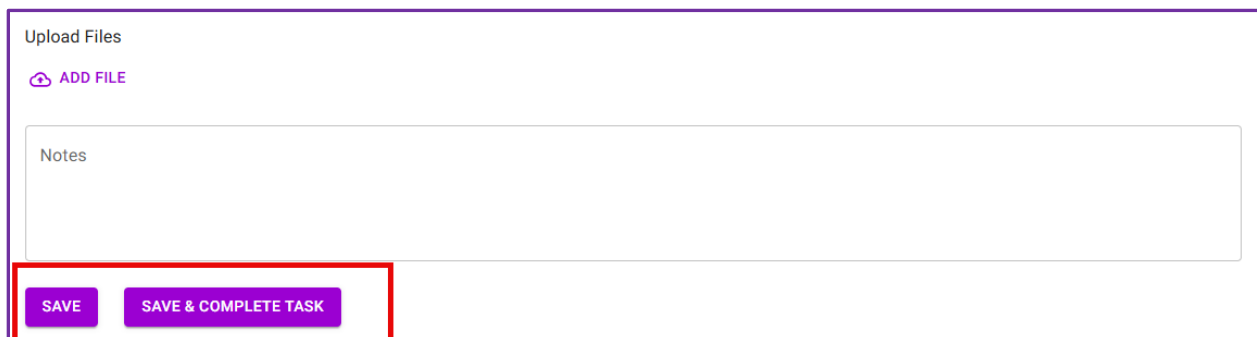
Upload Files

 **ADD FILE**


Final Steps for all Task Types

- Add any relevant details in the Comments and/or Supplemental Information sections.
- Click **SAVE** or **SAVE & COMPLETE TASK**.

The **SAVE & COMPLETE TASK** button becomes enabled only when all required fields are completed based on the selected processing type.



Upload Files

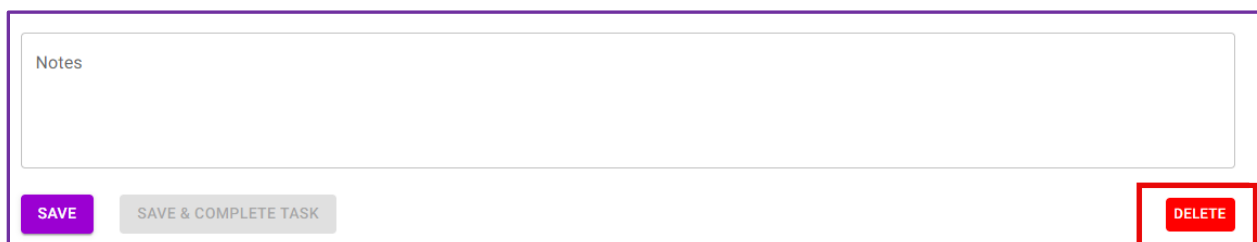
 **ADD FILE**

Notes

SAVE **SAVE & COMPLETE TASK**

Important Notes

- A completed task can be deleted but ONLY by an agency user.
- ***The deletion is permanent and the task cannot be restored!***



Notes

SAVE **SAVE & COMPLETE TASK** **DELETE**

Support Tasks

The Support Task module is designed to streamline and to provide a structured way to manage requests that fall outside of Eligibility Management Tasks.

This module allows both **Organization** and **Agency** users to create support tasks for a selected Company, with optional selection of a **Carrier** and **Carrier Plan**, along with a defined **Task Type**.

Available task types include:

- Plan Build
- Broker Support
- HR Support
- ACA
- Compliance
- Reporting
- Other

The Support Task module is designed to capture and track items that are not related to recurring enrollment processing, open enrollment, error reports, or issue workflows—helping improve organization and visibility of support-related activities.

Organization User Access

Organization users with **Admin, Comparer, or Task access** can create Support Tasks to log non-enrollment-related requests. When creating a task, Organization users can select the task type but **cannot assign the task**.

Instead, the task is automatically routed to the Agency's designated support email, as defined on the **Agency Detail** page.

Agency User Access

Once a Support Task is created, **Agency users** can review and reassign the task as needed. This ensures proper routing, ownership, and follow-up.

Benefits

- Centralizes support-related requests within the platform
- Improves visibility and tracking of non-enrollment tasks
- Enhances accountability and communication between organizations and agencies

Examples

Common uses for Support Tasks include:

- Submitting an ACA-related question
- Reporting an incorrect plan build
- Requesting general broker or HR support

The fields presented will vary slightly depending on where the task is created and what task and issue type is selected the same as the Eligibility Management tasks from earlier.

- When created at the **organization level**, you will need to manually select both the company and the carrier (optional).
- When created at the **company level**, the company is pre-populated for you.
- When created at the **company carrier level**, the company and carrier information is pre-populated for you.

How It Works

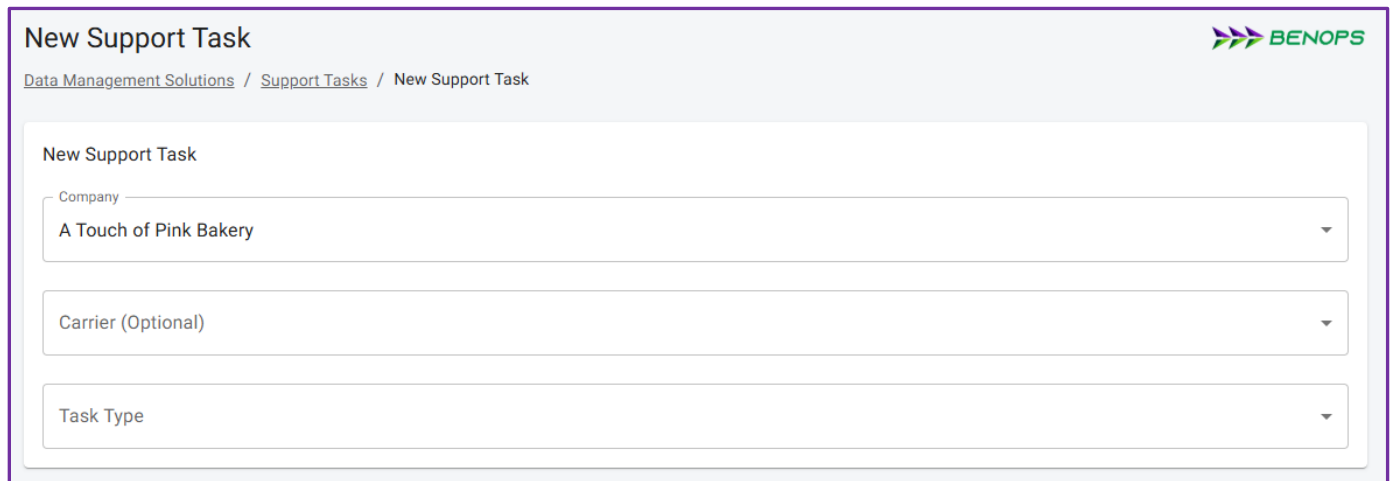
1. **Navigate to the organization or company** where the task will be created.
2. Select **Support Tasks** from the left menu under **TASKS**, then click **NEW**.

The screenshot shows the 'Support Tasks' page in the Streamline application. The left-hand navigation menu is visible, with 'Support Tasks' selected under the 'TASKS' category. The main area displays a table of existing support tasks. A 'NEW' button is highlighted in the top right corner of the table area.

| Company | Carrier Name | Plan Name | Task Name | Task Type | Assign |
|------------------|------------------------|---------------------|------------------------------|----------------|--------|
| A TOUCH OF PL... | (n/a) | (n/a) | NEW TASK ADDED | Plan Build | ima_aç |
| A TOUCH OF PL... | BLUE CROSS BLUE SHIELD | (n/a) | INCORRECT MAPPING FOR FU... | Plan Build | |
| A TOUCH OF PL... | BLUE CROSS BLUE SHIELD | Blue Options Plan 1 | INCORRECT MAPPING FOR FU... | Plan Build | gaager |
| A TOUCH OF PL... | (n/a) | (n/a) | SUPPORT TASK -REPORETING | Reporting | dmsag |
| A TOUCH OF PL... | (n/a) | (n/a) | PLAN BUILD SUPPORT TASK | Plan Build | dmsag |
| A TOUCH OF PL... | (n/a) | (n/a) | JFALKJDFL;KAJSDFKL;AJSD;K... | Broker Support | ima_aç |
| A TOUCH OF PL... | (n/a) | (n/a) | CREATE A NEW REPORT FOR ... | Reporting | gaager |
| A TOUCH OF PL... | SOLSTICE | (n/a) | CREATING SUPPORT TASK AS ... | Other | |

3. Company & Carrier Selection

- Choose the **company** from the dropdown if creating on the organization level. If the task is created on company level, the company will be preselected.
- OPTIONAL: Choose the **carrier** for that company.



New Support Task

Data Management Solutions / Support Tasks / New Support Task

New Support Task

Company
A Touch of Pink Bakery

Carrier (Optional)

Task Type

4. Task Type

- Select from the dropdown:
 - Plan Build
 - Broker Support
 - HR Support
 - ACA
 - Compliance
 - Reporting
 - Other

Required Fields for Creating a Support Task

NAME: Enter a unique task name (required per company).

ASSIGNEE: Select the user responsible for completing the task.

The assigned user will receive an email notification indicating that a new task has been assigned to them, along with a direct link to the task so they can access it without navigating through the application. If the assignee is changed after the task has been created—but before it is completed—the newly assigned user will also receive an email notification.

Note: The assignee may be changed after creation, but not after task completion.

If supporting files or documentation is available, upload it via **ADD FILES**.



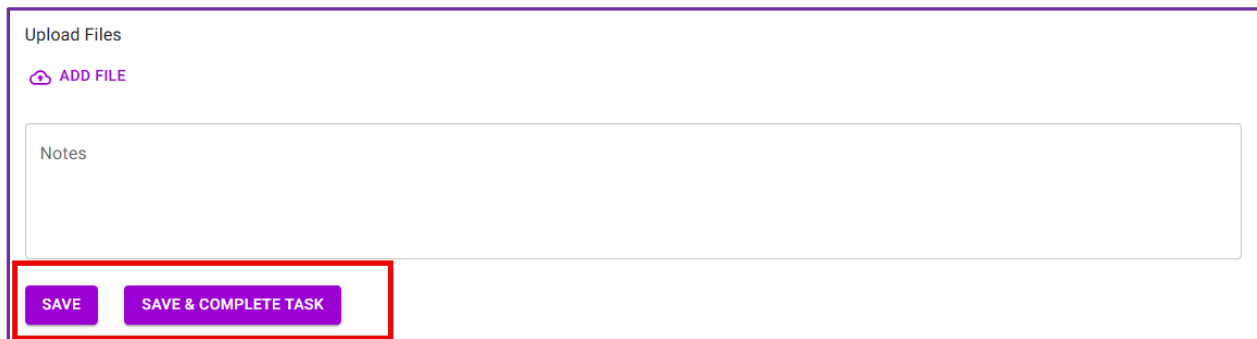
Upload Files

 **ADD FILE**


Final Steps for all Task Types

- Add any relevant details in the Comments and/or Supplemental Information sections.
- Click **SAVE** or **SAVE & COMPLETE TASK**.

The **SAVE & COMPLETE TASK** button becomes enabled only when all required fields are completed based on the selected processing type.



Upload Files

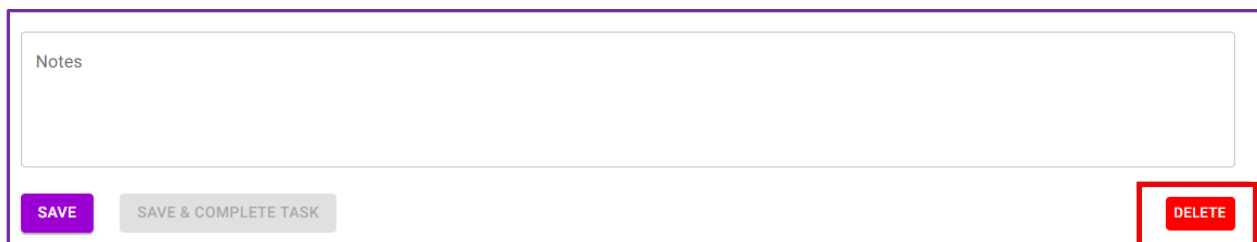
 **ADD FILE**

Notes

SAVE **SAVE & COMPLETE TASK**

Important Notes

- A completed task can be deleted but ONLY by an agency user.
- ***The deletion is permanent and the task cannot be restored!***



Notes

SAVE **SAVE & COMPLETE TASK** **DELETE**

Audit Tasks

The **Audit Task** module is designed to streamline the creation and management of audit-related tasks. Users can upload up to **three files** to support the audit process, allowing for a more efficient and organized workflow.

Once an Audit Task is created:

- The system automatically generates the associated **comparison** for the assigned user
- This reduces manual setup and simplifies the audit process

When an Audit Task is created by an **Organization user**:

- The task is automatically assigned to the **designated Agency Support Email**
- **Agency users** can reassign the task as needed to ensure proper ownership and workflow management

After the comparison is completed:

- **Agency users** can close the Audit Task directly within the audit

How It Works

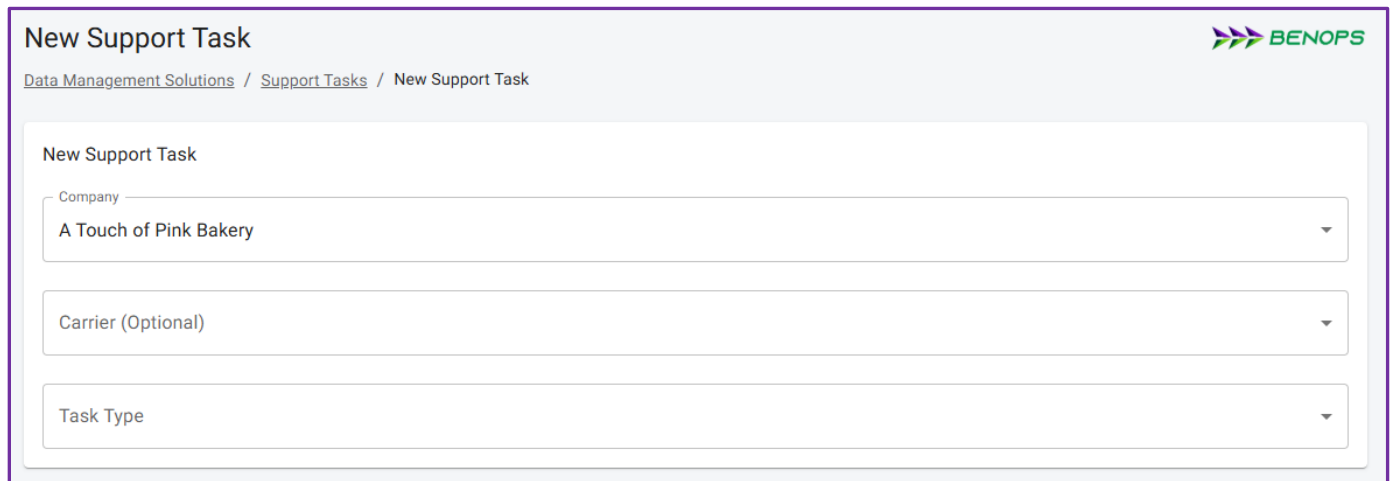
1. **Navigate to the organization or company** where the task will be created.
2. Select **Audit Tasks** from the left menu under **TASKS**, then click **NEW**.

The screenshot shows the 'Audit Tasks' page in the Streamline application. On the left, a navigation sidebar lists various menu items, with 'Audit Tasks' highlighted in green. The main area displays a table of audit tasks. The table has the following columns: Company, Carrier Name, Task Name, Comparison, and Comparison Step. A 'NEW' button with a plus icon is located in the top right corner of the table area.

| Company | Carrier Name | Task Name | Comparison | Comparison Step |
|------------------|------------------------|-------------------------------|-------------------------------|-----------------|
| A TOUCH OF PL... | BLUE CROSS BLUE SHIELD | BCBS TO EN INVOICE JULY 20... | BCBS TO EN INVOICE JULY 20... | Import Data |
| A TOUCH OF PL... | GUARDIAN | GUARDIAN INVOICE MARCH 2... | GUARDIAN INVOICE MARCH 2... | Complete |
| A TOUCH OF PL... | BLUE CROSS BLUE SHIELD | AUDIT TASK | AUDIT TASK | Complete |
| ABC COMPANY | (n/a) | AUDIT FOR TESTING EMAIL | AUDIT FOR TESTING EMAIL | Import Data |
| TACOS PIZZA J.. | (n/a) | AUDIT AS AGENCY USER | AUDIT AS AGENCY USER | Import Data |
| TACOS PIZZA J.. | DELTA DENTAL OF HI | GENERAL AS ORG TASK COMP | GENERAL AS ORG TASK COMP | Import Data |
| TACOS PIZZA J.. | DELTA DENTAL OF HI | GENERAL AUDIT | GENERAL AUDIT | Import Data |

3. Company & Carrier Selection

- Choose the **company** from the dropdown if creating on the organization level. If the task is created on company level, the company will be preselected.
- OPTIONAL: Choose the **carrier** for that company.



New Support Task

Data Management Solutions / Support Tasks / New Support Task

New Support Task

Company
A Touch of Pink Bakery

Carrier (Optional)

Task Type

4. Audit Type

a. Select from the dropdown:

- General Audit
- Enrollment Audit
- Post Open Enrollment Audit
- Pre-Production Audit
- Post Production Audit
- Invoice Reconciliation

Required Fields for Creating an Audit Task

NAME: Enter a unique audit task name (required per company).

ASSIGNEE: Select the user responsible for completing the task.

The assigned user will receive an email notification indicating that a new task has been assigned to them, along with a direct link to the task so they can access it without navigating through the application. If the assignee is changed after the task has been created—but before it is completed—the newly assigned user will also receive an email notification.

Note: The assignee may be changed after creation, but not after task completion.

If supporting files or documentation are available, they can be uploaded using the **ADD FILES** option.

Please note: If the Audit Task is created by an **Organization user**, all supporting files must be uploaded during the task creation process.

Upload Files

[ADD FILE](#)

Comments

Please note the below supplemental information section may be overwritten. While the comments section above will lock the comment with the timestamp once submitted.

Supplemental Information

I have uploaded the files to be used in this audit and provided any necessary instructions for the auditor.

CREATE TASK

Final Steps for all Task Types

- Add any relevant details in the Comments and/or Supplemental Information sections.
- Click **SAVE CHANGES & COMMENTS** or **SAVE & COMPLETE TASK**.

The **SAVE & COMPLETE TASK** button becomes enabled only when all required fields are completed based on the selected processing type and only for an Agency user.

Upload Files

No Upload Files found.

[ADD FILE](#)

Comments

Please note the below supplemental information section may be overwritten. While the comments section above will lock the comment with the timestamp once submitted.

Supplemental Information

SAVE CHANGES & COMMENTS **SAVE & COMPLETE TASK** **DELETE**

Important Notes:

- Links to both the **Task** and the **Audit** are available within their respective views. From within the audit, users can navigate directly to the associated task. From within the task, users can access the related audit. This allows users to easily toggle between the task and the audit for efficient navigation. Users also have the ability to **download any files** uploaded during the task creation process.

The screenshot shows two side-by-side views. The left view is 'Edit Audit Task' for 'Guardian Invoice March 2026'. It includes fields for Carrier (Guardian), Audit Type (Invoice Reconciliation), Name (Guardian Invoice March 2026), and Task Owner (marytester). Below these is an 'Upload Files' section with a table of files: 'Carrier - Payroll Combined File.xlsx', 'Test Files for Demos.xlsx', and 'Test Files for Demos-mapping.xlsx'. A red dashed arrow points from the 'Guardian Invoice March 2026' link in the 'The following comparison has been created and linked to this task' message to the 'Import Data' view on the right. The right view is 'Guardian Invoice March 2026 - Import Data'. It shows a progress bar with steps: Create, Import Data (active), Select Data Points, Map Data, Compare, Verify Discrepancies, Verify Missing Data, and Complete. Below the progress bar, a message states 'This comparison is linked to this Audit Task: Guardian Invoice March 2026'. A green box highlights the 'Upload Files' section in the task view, and a red dashed arrow points from the 'Test Files for Demos-mapping.xlsx' file in the task view to the 'Secondary File' section in the import data view.

- An Agency user can close the task from the audit once complete by clicking **COMPLETE AUDIT TASK**.

The screenshot shows the 'Guardian Invoice March 2026 - Complete' screen. The progress bar at the top indicates that all steps from 'Create' to 'Complete' are finished. Below the progress bar, a message states 'All discrepancies have been verified and this comparison is now completed! You may export the files containing the verified changes below.' There is a 'Comparison Details' dropdown menu and a 'Select file to export' dropdown menu. At the bottom, there are three buttons: 'BACK', 'GO TO ALL COMPARISONS', and 'COMPLETE AUDIT TASK'. The 'COMPLETE AUDIT TASK' button is highlighted with a red box.

- A completed task can be deleted but ONLY by an agency user.
- ***The deletion is permanent and the task cannot be restored!***

Comments ▼

Please note the below supplemental information section may be overwritten. While the comments section above will lock the comment with the timestamp once submitted.

Supplemental Information

[SAVE CHANGES & COMMENTS](#) [SAVE & COMPLETE TASK](#) [DELETE](#)

Email Customization

The Streamline application has customized emails at the company levels. **Please note that Email customization is only available on the Platinum Elite and Subscription Based Audits plans.**

Customization is available for the following:

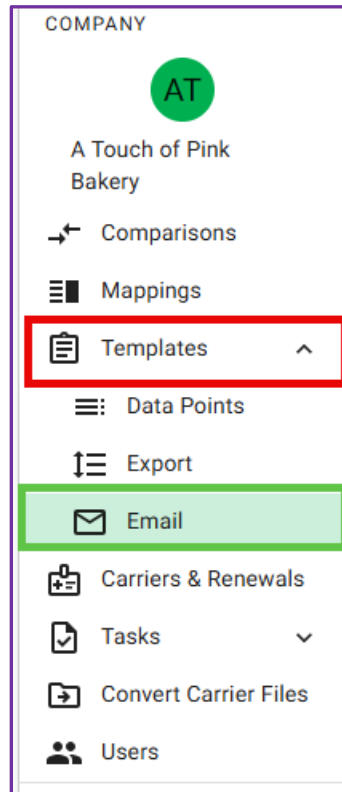
- Audit Task Assignment
- Comparison to Auditor
- Comparison to Verifier
- Eligibility Management Task Assignment
- Eligibility Management Task Assignment – Error Report
- Renewal Task Assignment
- Renewal Task Broker Managed
- Renewal Task Complete
- Renewal Task Kickoff
- Renewal Task Kickoff Follow Up
- Support Task Assignment

Key Features:

1. Customizable Templates:
 - Email templates can be found in the template library at both the organization and company levels.
 - Default language can be fully customized to suit user preferences.
2. Additional Tokens:
 - Include dynamic data like carrier name, discrepancy counts, and missing counts in your emails for more personalized and informative communication.
3. Priority Rules:
 - Company-Level Priority: If email templates are customized at both the organization and company levels, the company-level template will take precedence.
 - Fallback to Organization-Level: If no company customization is present, the application will use the organization-level customization.
 - Default System Emails: If no customization is made at either level, the application will default to the system-generated email.
 -

How to Customize an Email

1. To customize an email, navigate to the **Template Library** at the **Company** level, then select **EMAIL**.
 - At the **Company** levels, a dropdown will be available for selection.



2. From the Email templates dropdown, select the desired template to customize.

Email Templates

[A Touch of Pink Bakery](#) / Email Templates

Browse the Email Templates available and customize them if desired.

Company Email Templates


Email Templates

- Audit Task Assignment
- Comparison to Auditor
- Comparison to Verifier
- Eligibility Management Task Assignment
- Eligibility Management Task Assignment - Error Report
- Renewal Task Assignment
- Renewal Task Broker Managed
- Renewal Task Complete
- Renewal Task Kickoff
- Renewal Task Kickoff Follow Up
- Support Task Assignment

- Click the edit icon (✎). Please note that if a trashcan icon (🗑️) is available, there is current customization in place for this email.

Company Email Templates

Email Templates

Audit Task Assignment 

This is a system default email template. Click the edit button above to customize it.

Email subject

Insert token

{{agency_name}}: You have been assigned to {{company_name}} audit task: {{audit_task_name}}.

Email body

Paragraph | B I ↻ | Insert token

Hello {{assignee_first_name}} {{assignee_last_name}},
 You have been assigned a new audit task: {{audit_task_name}} for company: {{company_name}}. A comment may be included below.
 {{task_notes}}
 {{audit_task_direct_link_with_log_in_message}}
 Thank you,
 on behalf of {{from_first_name}} {{from_last_name}}, {{agency_name}}

Company Email Templates

Email Templates
Audit Task Assignment

This is a custom email template. It was last updated on 3/30/2026 by: gaagent. Click the edit button above to customize it, or click the delete button to restore the system default template.

Email subject

Insert token

{{agency_name}}: You have been assigned to {{company_name}} audit task: {{audit_task_name}}.

4. Add customized language to the subject line as well as the body. Tokens are available as well and can be added to the email. Tokens vary by email.
5. Click SAVE once customized.

CANCEL SAVE

Carrier Invoice Conversion

The Data Validation Platform has functionality to convert carrier invoices that are not platform-friendly and require significant manual adjustments before they can be used for auditing. This conversion functionality is available to all compare users but can only be converted on the company level.

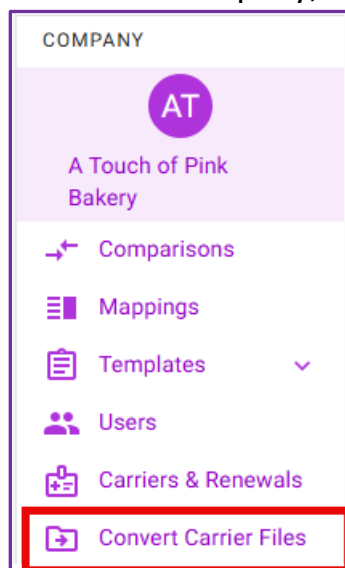
What This Functionality Does:

1. Removes adjustments and blank rows to streamline data processing.
2. Expands member names into separate columns for First Name, Last Name, and Middle Initial (MI).
3. Totals costs where benefits have separate charges on separate rows for spouse and child, such as Critical Illness and Voluntary Life.
4. Adds additional total columns for benefits that are separated in one file but combined in another. This applies to Group Life and AD&D, as well as Voluntary Life and AD&D.

The converted file is then ready for audit use, significantly reducing manual effort and improving efficiency.

To convert a carrier invoice:

1. Navigate to a company if organization user.
2. Under the company, select Convert Carrier Files in the left-hand menu.



3. Select Carrier Format dropdown and then the applicable carrier file.

Convert a File

Carrier Format ▼

Original Carrier File

Choose File No file chosen

CONVERT

4. Click Choose File and select the carrier invoice

Convert a File

Carrier Format
Guardian Row Based ▼

Original Carrier File

Choose File No file chosen

CONVERT

5. If multiple tabs, select the one to be converted and then rename if desired.

Convert a File

Carrier Format
Guardian Row Based

Original Carrier File

Choose File Guardian Row ...sed Invoice.xls

Select Worksheet
Download Bill

File Name
Guardian Row Based Invoice .xls

CONVERT

6. Click **CONVERT**. A successful message will show no conversion errors.

 **File converted and downloaded successfully!** 

7. The converted file is automatically downloaded to the user's computer and is not saved in the Platform.
8. The file is now ready to be used in a comparison.

Carrier Tracking

The Streamline application provides the option to import or to manually add carrier information for a company. Using the provided template the following information can be imported into the application:

- Company Name (**Required** and must match company name in application)
- Carrier Name (**Required** and must match carrier name found in Import Template)
- Group Number (**Required**)
- Renewal Month (**Required**)
- Renewal Kickoff Days in Advance (Can choose between 30 to 90 days)
- Carrier Invoice Day of Month (Optional)
- Eligibility Management Type (Optional)
- Carrier Inception Date (Optional)
- Carrier End Date (Optional)
- Disable Renewals (Optional Checkbox)
- Carrier Contact Name (Optional)
- Carrier Contact Email (Optional)
- Carrier Contact Phone Number (Optional)
- Notes (Optional)
- Secondary Carrier Contact Name (Optional)
- Secondary Carrier Contact Email (Optional)
- Secondary Carrier Contact Phone Number (Optional)
- Audit Service (Optional Checkbox)
- Organization Eligibility Contact (Optional – select from available dropdown)
- Organization Audit Contact (Optional – select from available dropdown)

Carrier Information can only be imported under the organization but can be manually added under on the Company level.

Carrier information tracking, however, is only available through the Platinum Elite or Subscription Based Audits subscription plans.

Manually Add Carrier

Carrier information can be added on the Company level by selecting Carriers & Renewals from the left menu.

COMPANY

AT

A Touch of Pink Bakery

- ↩ Comparisons
- ≡ Mappings
- 📄 Templates ▼
- 👤 Users
- ➕ Carriers & Renewals
- 📁 Convert Carrier Files

Click ADD A NEW CARRIER

Carriers

ML: Demo Company / Carriers

The table below shows the carriers that have been added for your company.

ADD A NEW CARRIER

| Carrier | Benefit | Group Number | Renewal Month | Email | Active | Notes |
|------------------|-----------------------|--------------|---------------|--------------------|--------|-------|
| CIGNA | Medical | C123456 | February | donaldduck@g... | Yes | Demo |
| CVS CAREMARK | Prescription | PIU-9874 | August | allison@cvcs-ca... | Yes | |
| UNITEDHEALTHCARE | Group Life/ADD | UH98745 | January | parker@marvel... | Yes | |
| USABLE LIFE | Critical Illness, ... | Z-7410 | January | cdanvers@mor... | Yes | |

Complete all required fields highlighted in red and any optional fields highlighted in yellow, if applicable.

- Carrier Name: The available carriers are provided. If a desired carrier is not listed, a request can be made to add through our enhancement request form: [Enhancement Request Form - DMS Data Validate \(dms-datavalidate.com\)](https://dms-datavalidate.com)
- Renewal Month: Please select the company's annual benefit renewal month.

New Carrier

Carrier

Please contact us to add a carrier not in this list

Group Number

Renewal Month

Renewal Kickoff Days In Advance

Carrier Invoice Day Of Month

Eligibility Management Type

Carrier Inception Date

Carrier End Date

Disable Renewals

Disable Renewals

Carrier Contact Name

Carrier Contact Email

Carrier Contact Phone

Secondary Carrier Contact Name

Secondary Carrier Contact Email

Secondary Carrier Contact Phone

Audit Service

Audit Service

Organization Eligibility Contact

Organization Audit Contact

Notes

SAVE

Click SAVE once all information has been added.

Once a carrier has been added to the company carrier library, it can then be selected during the audit creation process or updated at a later date.

Carrier Plan Tracking

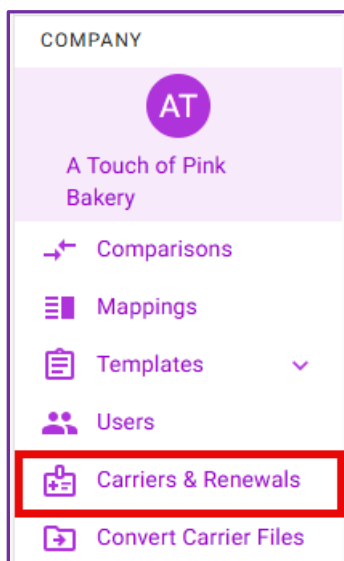
The Streamline application provides the option to manually add carrier plan information for a company and a specific carrier as well as an import option. The following information can be added to the application:

- Carrier (Required and auto defaults to selected carrier)
- Plan Name (Required)
- Benefit Type (Required – select from available dropdown options)
- Group Number (Optional – If Group Number was added at Carrier Level, it will default to the Plan level. However, this field can be overwritten at the plan level)
- Eligibility Management Type (Optional – If Type was added at Carrier Level, it will default to the Plan level. However, this field can be overwritten at the plan level)
- Disable Renewals (Optional Checkbox)
- Notes (Optional)

Carrier plan information tracking, however, is only available through the Platinum Elite or Subscription Based Audits subscription plans.

Manually Add Plan

Plan information can be manually added on the Company level by selecting Carriers from the left menu.



Select the carrier that you would like to add a plan to. Please note that the carrier has to be added prior to adding a plan.

The table below shows the carriers that have been added for your company. [ADD A NEW CARRIER](#)

| Carrier | Group Number | Renewal Month | Eligibility Management Type | Active | Notes |
|------------------|--------------|---------------|-----------------------------|--------|----------|
| CVS CAREMARK | PIU-9874 | August | | Yes | |
| CIGNA | C123456 | February | | Yes | Demo |
| UNITEDHEALTHCARE | UH98745 | January | | Yes | |
| ACCESS HEALTH | 789541 | January | | Yes | No notes |

Click ADD A NEW PLAN. The location of ADD A NEW PLAN will vary if there are existing plans under the carrier.

Carrier Information [EDIT](#)

| | |
|------------------------------|---------------------------------|
| Carrier | Group Number |
| CVS Caremark | PIU-9874 |
| Renewal Month | Renewal Kickoff Days In Advance |
| August | |
| Carrier Invoice Day Of Month | Eligibility Management Type |
| 1 | |
| Carrier Inception Date | Carrier End Date |
| | |

Carrier Plans

| Plan Name | Benefit | Eligibility Management Type | Inception Date | End Date | Disable Renewals | Active |
|----------------|---------|-----------------------------|----------------|----------|------------------|--------|
| No Plans Exist | | | | | | |

[ADD A NEW PLAN](#)

Carrier Information

[EDIT](#)

| | |
|------------------------------------|---------------------------------|
| Carrier UnitedHealthcare | Group Number UH98745 |
| Renewal Month January | Renewal Kickoff Days In Advance |
| Carrier Invoice Day Of Month 15 | Eligibility Management Type |
| Carrier Inception Date | Carrier End Date |

Carrier Plans

[ADD A NEW PLAN](#)

[FILTERS](#) [EXPORT](#)

| Plan Name | Benefit | Eligibility Management Type | Inception Date | End Date | Disable Renewals | Active |
|-------------|---------|-----------------------------|----------------|----------|------------------|--------|
| PLAN 1 GOLD | Medical | | | | No | Yes |

Complete all required fields highlighted in red and any optional fields highlighted in yellow, if applicable. The fields highlighted in Green are for Agency use only and are not editable to the company user. Click SAVE once all information has been added.

New Plan

Carrier
Admin America

Plan Name

Benefit Type

Group Number
Using Carrier Group Number: 7841

Eligibility Management Type
Using Carrier Eligibility Management Type: BBS Managed Proprietary

Disable Renewals
 Disable Renewals

Number of Eligible

Number of Enrolled

GA Eligibility Contact
Using GA Eligibility Contact: gaagent

GA Audit Contact
Using GA Audit Contact: gaagent

Notes

SAVE

Template Library

The Streamline application template library contains three individual libraries:

1. Data Points templates
2. Export templates
3. Email templates

Both data points and export templates can be created and re-used during a compare. These two templates are created at the company level and are restricted to the specific company. To access the library, click on TEMPLATES under the company left side menu and then select the type of template.

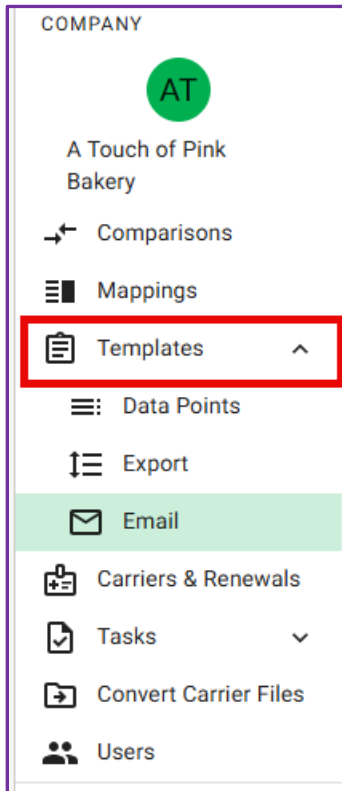
PLEASE NOTE: Company admins which are available under our Platinum Elite subscription will only have access to the templates that are created under their specific company.

The data points and export templates are not editable other than the name. However, they can be deleted. Please be aware that a deleted template cannot be recovered, and the deletion is permanent. If deleted in error, the template will need to be recreated during the compare.

The email template library contains the default system generated emails on the company level. **Please note that Email customization is only available on the Platinum Elite and Subscription Based Audits plans.**

If customization is present the priority is

- Company-level templates take highest precedence
- Organization-level templates are used if no Company template exists
- Agency-level templates are used if neither Company nor Organization templates are available
- If no custom templates are configured, the system defaults to the standard system-generated template



A shared data point or export template will also contain the user who created/last updated the template as well as which company the template originated from.

Data Points Templates

[Data Management Solutions-DVP Internal Use](#) / [Data Points Templates](#) / [Demo Import Template](#)

Browse the Data Points Templates available to all companies during comparisons.

Shared Data Point Templates

-- Data Points Template

Demo Import Template



Shared with Organization from Company: [ML: Demo Company](#)

Last updated on 3/26/2024 by: malanier2024

Baseline File

Secondary File

Employee SSN

Employee SSN

Unique Identifier

Social Security Number

Social Security Number

Unique Identifier

First Name

First Name

Unique Identifier

Middle Name

Middle Name

Unique Identifier

Last Name

Last Name

Unique Identifier

DOB

DOB

Unique Identifier

Employment Status

Employment Status

Unique Identifier

Reports

The Streamline application provides several downloadable reports:

Audit Reports

These reports are available for all audits once Step 5 Compare and/or Step 8 Complete have been reached.

The first set of reports are available on Step 5 Compare:

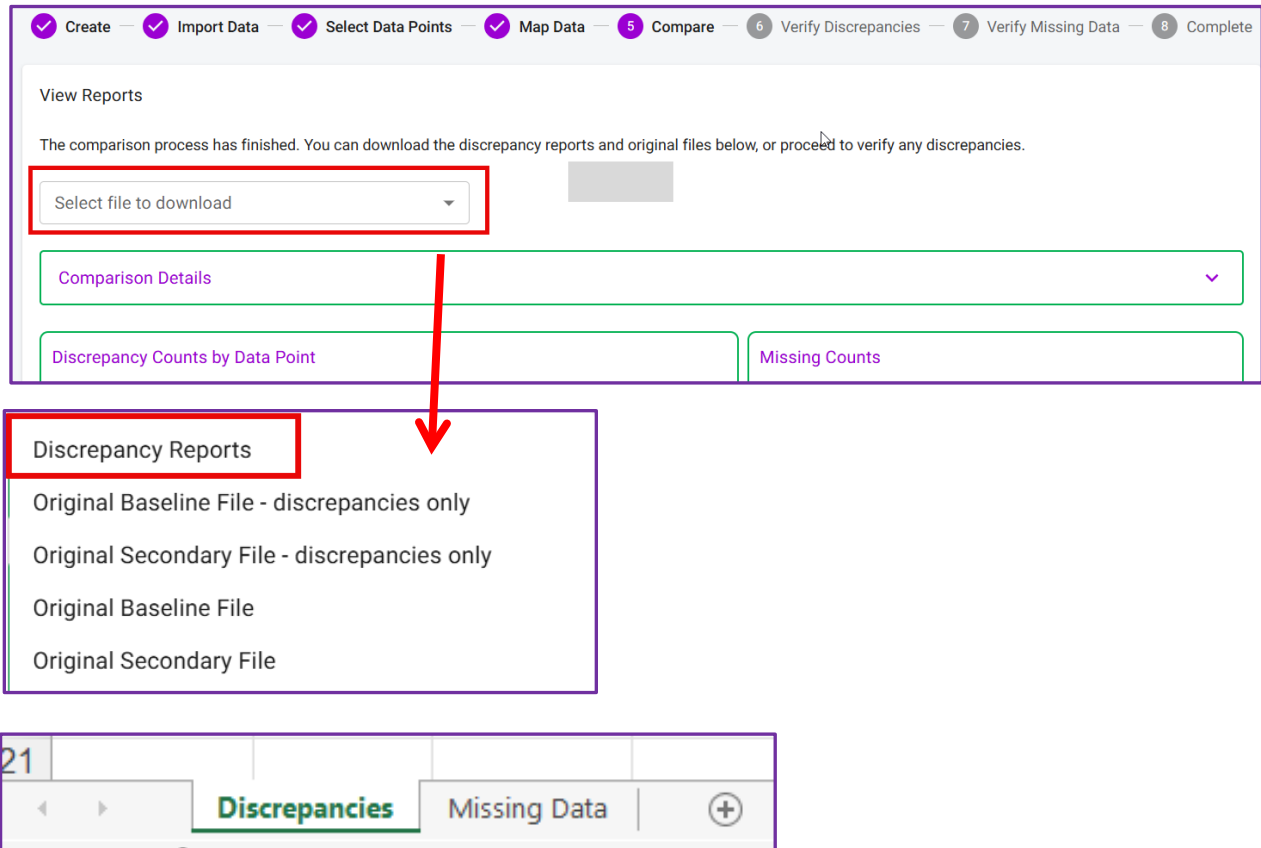
- Discrepancy Report
- Original Baseline File- discrepancies only
- Original Secondary File – discrepancies only
- Original Baseline File
- Original Secondary File

The second set of reports are available on Step 8 Complete

- All Records Including Verified
- Verified Records Only

Discrepancy Report

This is a downloadable report located on Step 5 - Compare that contains all data discrepancies and missing data identified during the compare process. The report will include a results column along with the discrepancy function column IF this functionality was selected during the mapping process.



Original Baseline File – discrepancies only / Original Secondary File – discrepancies only

These are downloadable reports located on Step 5 – Compare. These reports display all data points within a row from either the baseline or secondary file, regardless of where the discrepancy occurs.

A dedicated discrepancy column is included that highlights the specific data point where the mismatch is found. This additional report is designed for scenarios like imports, and it ensures all relevant data points—alongside the discrepancy—are readily available for further processing.

The new Discrepancy Report can now be accessed in Step 5 Compare within the updated Download Reports dropdown. They are named: Original Baseline File – discrepancies only and Original Secondary File – discrepancies only.

Original Baseline File / Original Secondary File

This is a downloadable report located on Step 5 - Compare that contains all data from the original import files prior to mapping and is available for either the baseline or the secondary.

All Records Including Verified

This is a downloadable report located in Step 8 - Complete that contains all records from either the baseline or secondary file including the verified records (discrepancies and missing). The *All Records Including Verified* report also includes 5 additional columns added to the original files:

- DMS_Verified_By
- DMS_Auditor_Notes
- DMS_Verifier_Notes
- DMS_Discrepancy_Type
- DMS_Ignored_Discrepancies

Select file to export

Base

Customize Export - 'Base'

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. The merged indicator will only show for data points being merged into the selected export file. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

No applicable Export Templates

| | Original Name | Rename To | Format Values | Merged |
|---|---------------|----------------------|----------------------|--------------------------|
| = | Employee SSN | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> |
| = | First Name | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> |

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

Share with Organization

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED

EXPORT V

BACK

GO TO ALL COMPARISONS

| | D | E | F | G | H | I | J | K |
|---|-----------|--------|-----------------|--------------|---------------------------------|-----------------------------|--------------------|---------------------------|
| 1 | DOB | Gender | Monthly Premium | Date of Hire | DMS_Verified_By | DMS_Auditor_Notes | DMS_Verifier_Notes | DMS_Ignored_Discrepancies |
| 2 | 2/18/1989 | Male | 259.55 | 5/1/2024 | | | | |
| 3 | 1/3/1975 | Female | 259.55 | 5/4/1995 | | | | |
| 4 | 1/6/1980 | Male | | 5/5/1995 | [Monthly Premium]: malanier2024 | [Monthly Premium]: dfasdfas | | |

Verified Records only

This is a downloadable report located in Step 8 - Complete that contains **only** records from either the baseline or secondary file that have been verified (discrepancies and missing). The *Verified Records only* report also includes 4 additional columns added to the original files:

- DMS_Verified_By
- DMS_Auditor_Notes
- DMS_Verifier_Notes
- DMS_Discrepancy_Type

Select file to export
 Base

Customize Export - 'Base'

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. The merged indicator will only show for data points being merged into the selected export file. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

No applicable Export Templates

| Original Name | Rename To | Format Values | Merged |
|---------------|----------------------|----------------------|--------------------------|
| Employee SSN | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> |
| First Name | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> |

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

Share with Organization

[SAVE CUSTOMIZATIONS](#)

EXPORT ALL RECORDS INCLUDING VERIFIED

EXPORT VERIFIED RECORDS ONLY

BACK

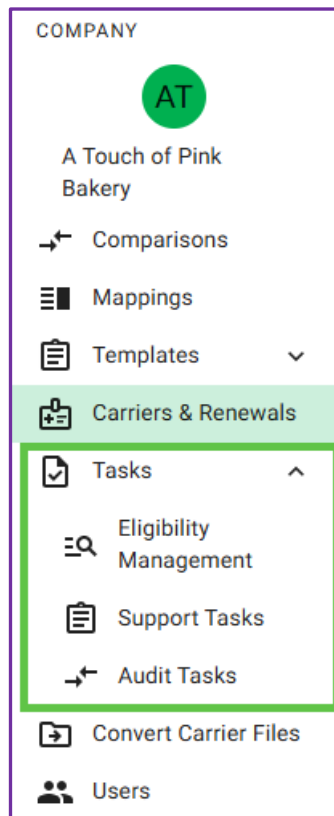
GO TO ALL COMPARISONS

| | A | B | C | D | E | F | G | H | I | J |
|---|-----------|------------|-----------|----------|--------|-----------|--------------|----------------------|-----------------------|--------------------|
| 1 | Employee | First Name | Last Name | DOB | Gender | Monthly P | Date of Hire | DMS_Verified_By | DMS_Auditor_Notes | DMS_Verifier_Notes |
| 2 | 217-21-91 | Katherine | Aldridge | 1/6/1980 | Male | | 5/5/1995 | [Monthly Premium]: m | [Monthly Premium]: df | |
| 3 | 217-21-57 | Michael | Bebe | 8/9/1972 | Female | | 5/12/1995 | [Monthly Premium]: m | [Monthly Premium]: as | |
| 4 | 555-66-12 | Julia | Benefits | ##### | Female | 259.55 | | malanier2024 | | |
| 5 | 224-11-85 | SHEILA | CARTER | | Male | 259.55 | 5/23/1995 | [DOB]: malanier2024 | [DOB]: asd | |

Ignored Records will **not** show in the *Verified Records only* report.

Company Reports

There are several reports that live on the Company level: Eligibility Management, Support Tasks, and Audit Tasks. This new section provides visibility into tasks—all in one central location. Reports can be filtered by various columns and exported to CSV or printed.



Eligibility Management: This table provides a view of all Eligibility Management tasks created for the organizations and companies available to the user. The report can be easily exported for additional review or sharing.

Eligibility Management Tasks NEW

FILTERS EXPORT

| Carrier Name | Task Name | Changes Date Range | Task Type | Processing/Err |
|------------------------|----------------------------|--------------------|-----------|------------------|
| BLUE CROSS BLUE SHIELD | FILE FAILED | (n/a) | Issue | File Transmiss |
| BLUE CROSS BLUE SHIELD | EMT ISSUE 1 | (n/a) | Issue | File Transmiss |
| BLUE CROSS BLUE SHIELD | ISSUE !@##\$ | (n/a) | Issue | File Structure U |
| BLUE CROSS BLUE SHIELD | TESTING 03.17.2026 | (n/a) | Issue | File Transmiss |
| BLUE CROSS BLUE SHIELD | OR USER 03.17.2026 | (n/a) | Issue | File Structure U |
| BLUE CROSS BLUE SHIELD | SKLDFJALKSJDFKLASJDFLKA... | (n/a) | Issue | File Transmiss |
| BLUE CROSS BLUE SHIELD | WHAT IN THE WORLD!!! | (n/a) | Issue | |
| BLUE CROSS BLUE SHIELD | BCBS FILE ERROR | (n/a) | Issue | File Transmiss |

1-8 of 25

Support Tasks: This table provides a view of all Support tasks created for the organizations and companies available to the user. The report can be easily exported for additional review or sharing.

Support Tasks NEW

FILTERS EXPORT

| Carrier Name | Plan Name | Task Name | Task Type | Assignee |
|------------------------|---------------------|------------------------------|----------------|-----------------|
| (n/a) | (n/a) | NEW TASK ADDED | Plan Build | ima_agency_user |
| BLUE CROSS BLUE SHIELD | (n/a) | INCORRECT MAPPING FOR FU... | Plan Build | |
| BLUE CROSS BLUE SHIELD | Blue Options Plan 1 | INCORRECT MAPPING FOR FU... | Plan Build | gaagent |
| (n/a) | (n/a) | SUPPORT TASK -REPRETING | Reporting | dmsagency |
| (n/a) | (n/a) | PLAN BUILD SUPPORT TASK | Plan Build | dmsagency |
| (n/a) | (n/a) | JFALKJDFL;KAJSDFKL;AJSD;K... | Broker Support | ima_agency_user |
| (n/a) | (n/a) | CREATE A NEW REPORT FOR ... | Reporting | gaagent |
| SOLSTICE | (n/a) | CREATING SUPPORT TASK AS ... | Other | |

1-8 of 13

Audit Tasks: This table provides a view of all Audits tasks created for the organizations and companies available to the user. The report can be easily exported for additional review or sharing.

Audit Tasks

 NEW

 FILTERS  EXPORT

| Carrier Name | Task Name | Comparison | Comparison Step | Assignee |
|------------------------|-------------------------------|-------------------------------|----------------------|-----------|
| (n/a) | 2025-2026 MEDICAL - GOLD | 2025-2026 MEDICAL - GOLD | Import Data | gaagent |
| BLUE CROSS BLUE SHIELD | BCBS TO EN INVOICE JULY 20... | BCBS TO EN INVOICE JULY 20... | Import Data | dmsagency |
| GUARDIAN | GUARDIAN INVOICE MARCH 2... | GUARDIAN INVOICE MARCH 2... | Select Data Points | |
| BLUE CROSS BLUE SHIELD | AUDIT TASK | AUDIT TASK | Complete | dmsagency |
| BLUE CROSS BLUE SHIELD | BCBS POST OE ENROLLMENT ... | BCBS POST OE ENROLLMENT ... | Complete | |
| GUARDIAN | GUARDIAN: DENTAL POST OE ... | GUARDIAN: DENTAL POST OE ... | Import Data | gaagent |
| BLUE CROSS BLUE SHIELD | BCBS 2026 Q2 CK AUDITS | BCBS 2026 Q2 CK AUDITS | Import Data | gaagent |
| BLUE CROSS BLUE SHIELD | BCBS 2026 Q1 CK AUDIT | BCBS 2026 Q1 CK AUDIT | Verify Discrepancies | gaagent |

1-8 of 9



Key Words

The Platform has key words that it utilizes to determine a match between columns. These key words are:

SSN:

- ssn
- social security number
- socialsecuritynumber
- ss#
- social security #
- ee id
- social security no
- memberid

First Name:

- first name
- firstname
- first_name
- fname

Last Name:

- last name
- lastname

Address:

- Address
- Address 1
- Address 2
- Address
- ADDRESS LINE 1
- ADDRESS LINE 2
- Street Address

Date of Hire:

- doh
- date of hire
- hire date

Date of Birth:

- dob
- date of birth
- birth date

Termination Date

- dot
- term date
- termination date

Zip

- Zip
- Zip code

Knowledge Base



The Data Validation Platform provides a knowledge base for frequently asked questions.

[DV Platform Knowledge Base - DMS Data Validate \(dms-datavalidate.com\)](https://dms-datavalidate.com)

Benefit Systems



The Data Validation Platform provides instructional videos for various carrier files for enrollments and invoices.

[DV Platform Benefit Systems - DMS Data Validate \(dms-datavalidate.com\)](https://dms-datavalidate.com)

Release Notes



The Data Validation Platform release notes are available through our website for reference.

[Release Notes Log - DMS Data Validate \(dms-datavalidate.com\)](https://dms-datavalidate.com)

Revision History

| VERSION | DATE | DESCRIPTION | AUTHOR |
|---------|------------|--|-------------|
| Draft 1 | 06/01/2021 | New document | Mary Lanier |
| 1.0 | 06/01/2021 | Approved document | Mary Lanier |
| 2.0 | 06/23/2023 | Updated instructions | Mary Lanier |
| 3.0 | 04/04/2024 | Updated instructions to include new color scheme, website, and enhancements. | Mary Lanier |
| 4.0 | 05/24/2024 | Updated verbiage to include masked social security number and how to assign a verifier. Also included notification emails to verifier and to auditor | Mary Lanier |
| 5.0 | 07/09/2024 | Updated to include carrier tracking enhancement | Mary Lanier |
| 6.0 | 10/15/2024 | Added verbiage to include discrepancy type dropdown and additional field to the carrier tracking information | Mary Lanier |
| 7.0 | 12/05/2024 | Updated with new enhancements including additional discrepancy reports and customized emails | Mary Lanier |
| 8.0 | 02/19/2025 | Updated with new enhancement for Carrier Invoice Conversion | Mary Lanier |
| 9.0 | 05/20/2025 | Updated with new carrier plan feature and additional user fields | Mary Lanier |
| 10.0 | 06/12/2025 | Updated carrier and plan fields | Mary Lanier |
| 11.0 | 10/23/2025 | Updated images | Mary Lanier |
| 12.0 | 03/30/2026 | Audit and Support tasks – Release Notes 03-24-2026 and 02/18/2026 | Mary Lanier |
| | | | |
| | | | |