Company User Guide

STREAMLINE

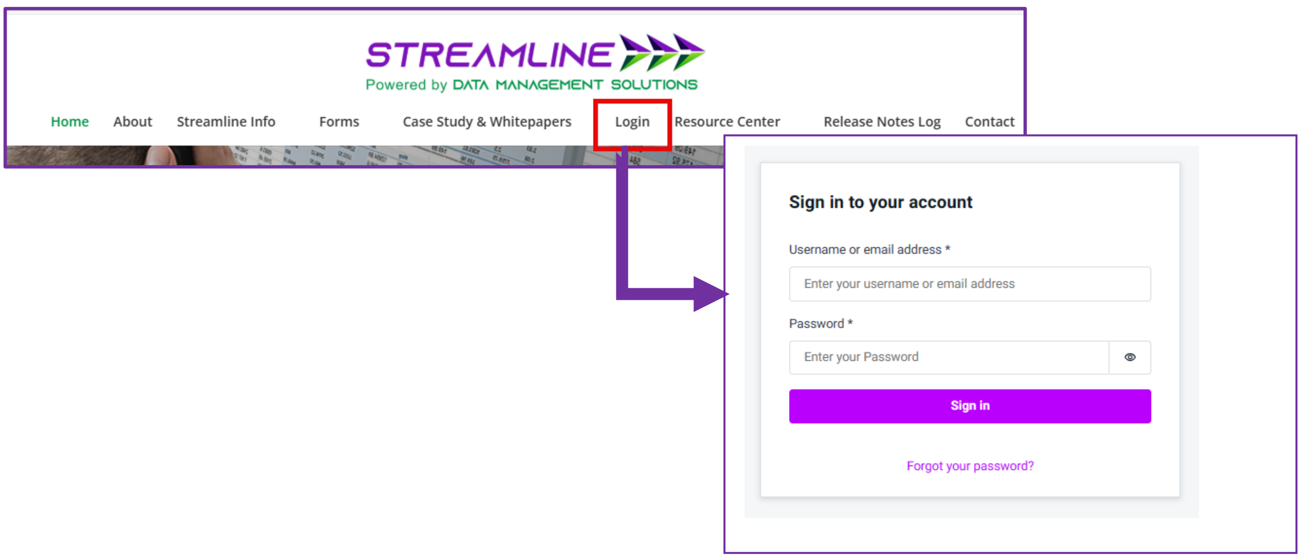
Powered by

DATA MANAGEMENT SOLUTIONS

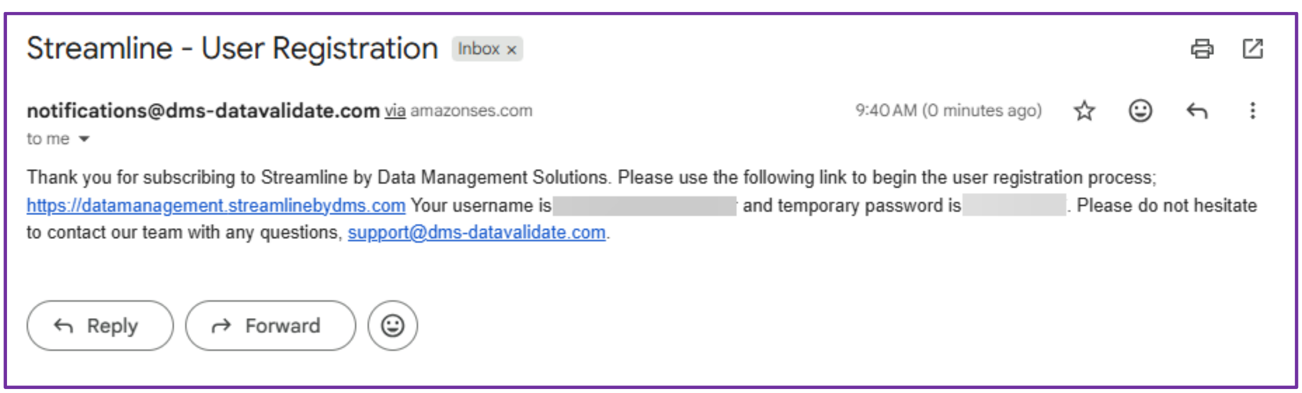
Table of Contents

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.

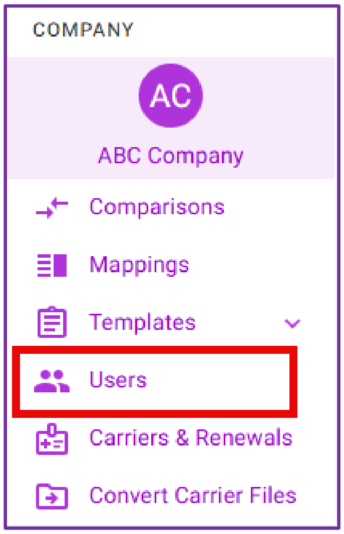
8. **Company-Level Verifier – Partial Access**
   Allows verification of discrepancies and missing data for existing compares within a single company. This role does not include compare and merge functionality.

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

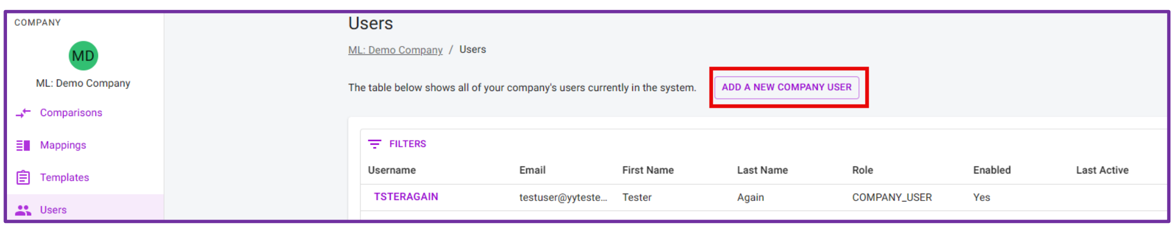
Only Company level users are discussed in this set of instructions. Please reference the Agency or Organization Level User process document for information pertaining to that level.

Adding a Company Level Verifier user

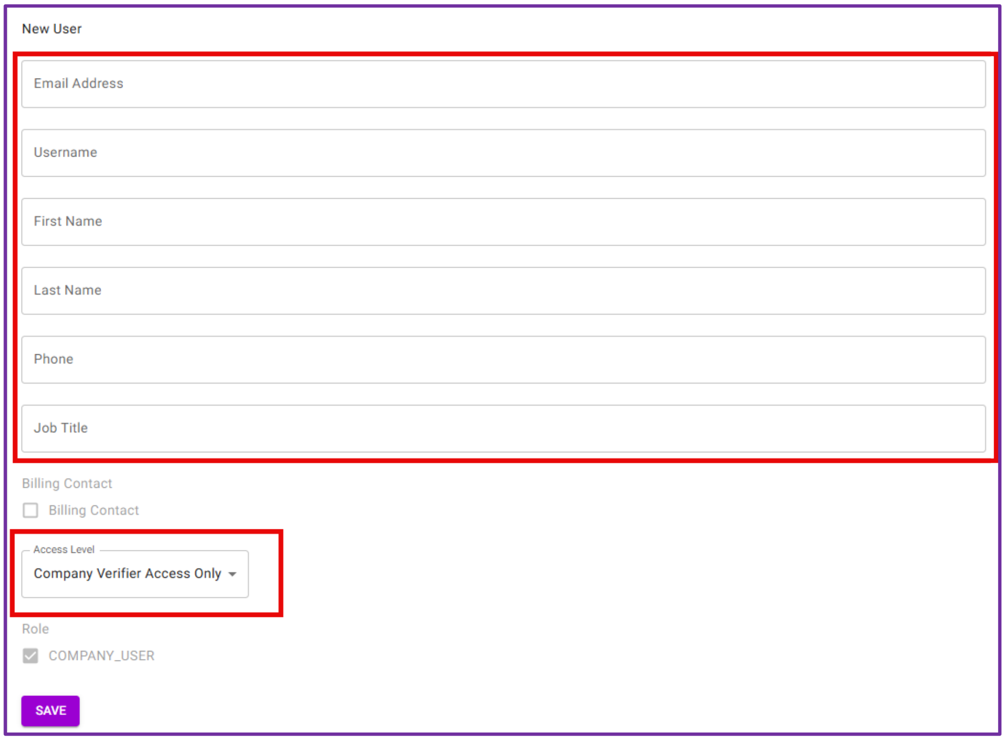
Select Users in the left menu bar.



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.



Once all applicable information has been entered click Save.

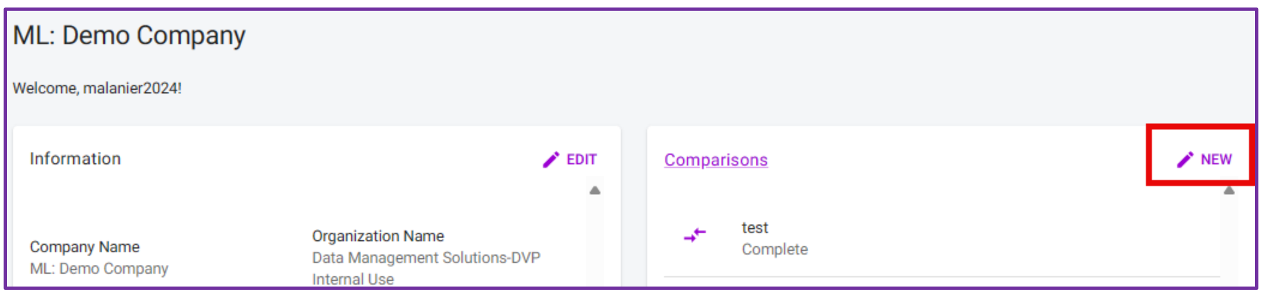
The user will then receive an auto-generated email with a temporary password and a link to register their account.

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

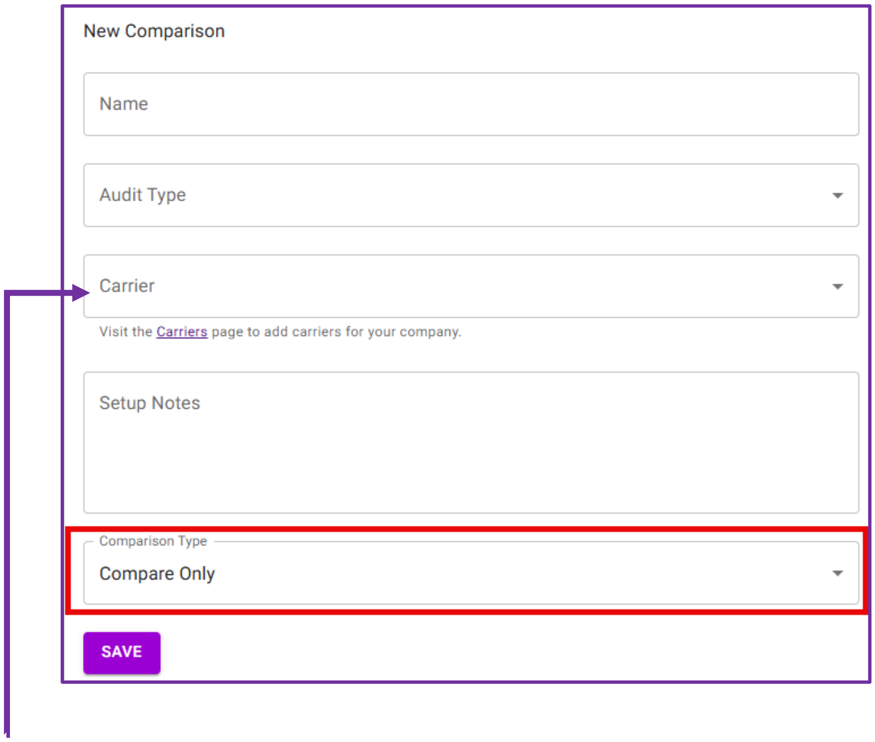
Select NEW to begin a new comparison



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.

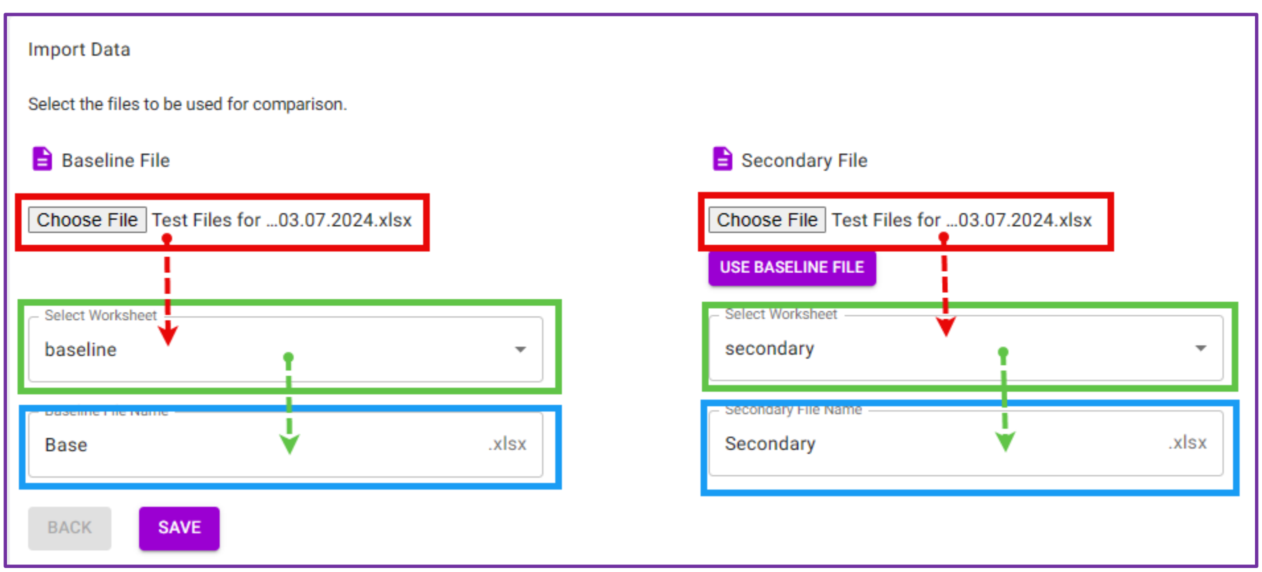
Please Note that once the comparison type is selected and saved, it cannot be changed.



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.

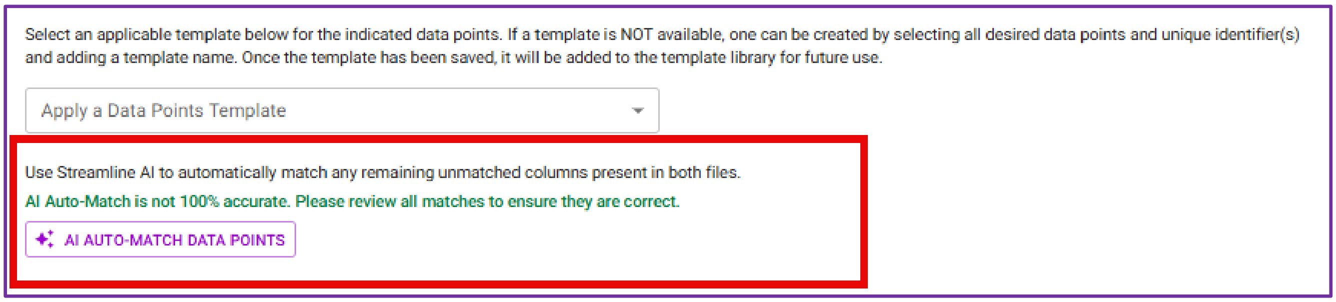


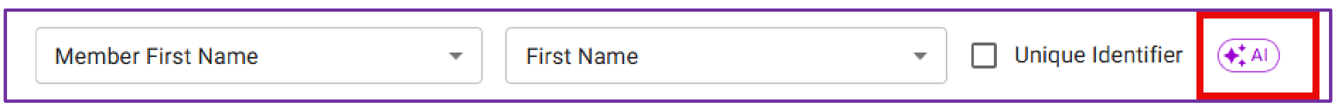
Select Data Points & Create Import Template

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.





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

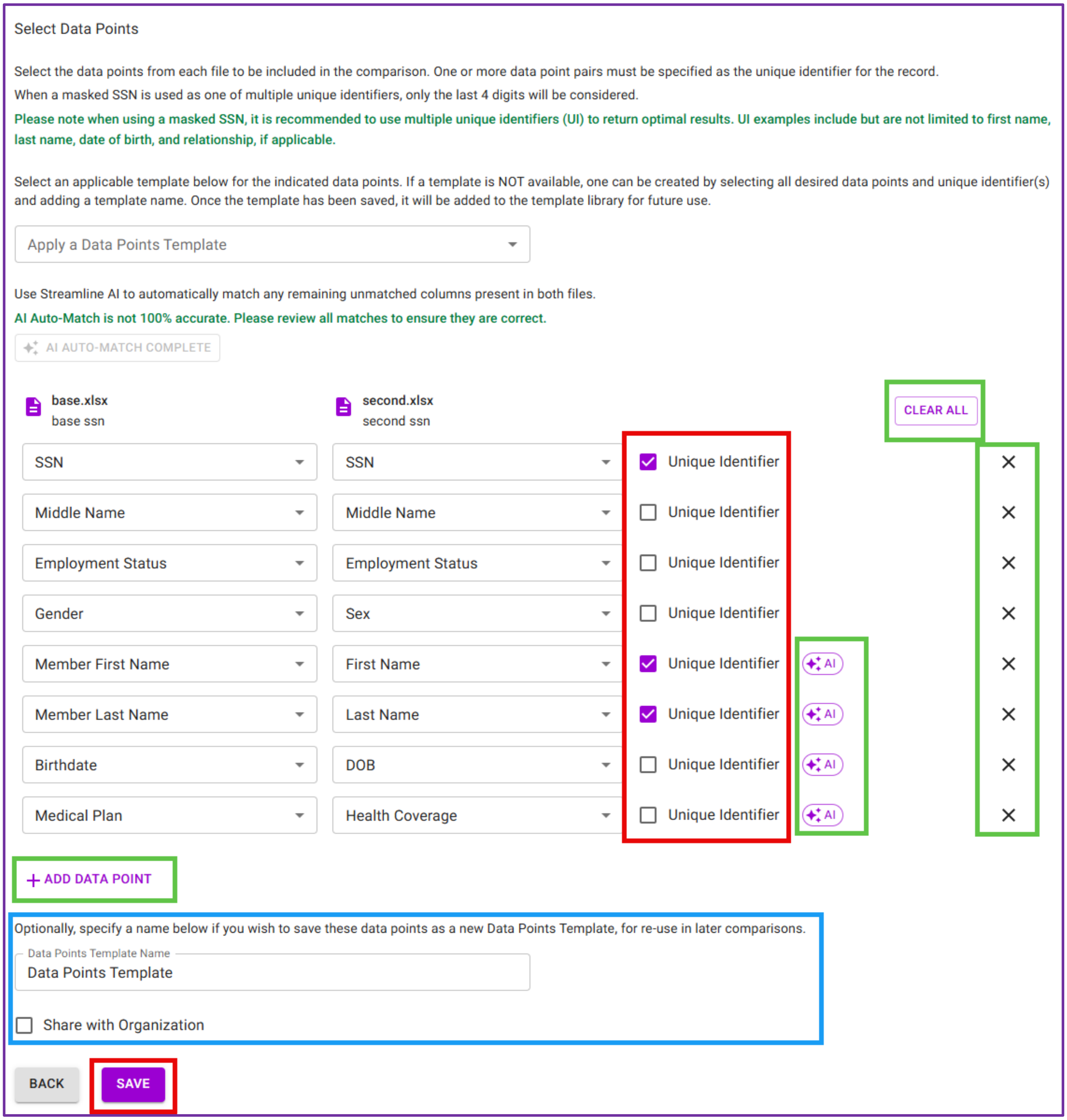
At least **one (1) unique identifier** must be selected. To remove all data points, click **CLEAR ALL**.

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.

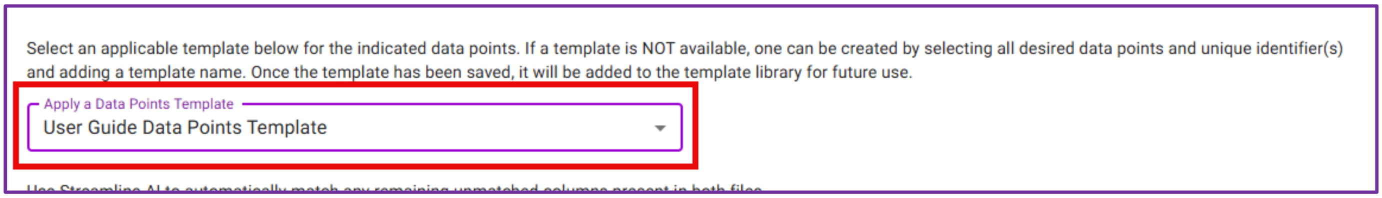
Company Admins (available under the Platinum Elite subscription) will only have access to templates created within their specific company.

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 & 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.

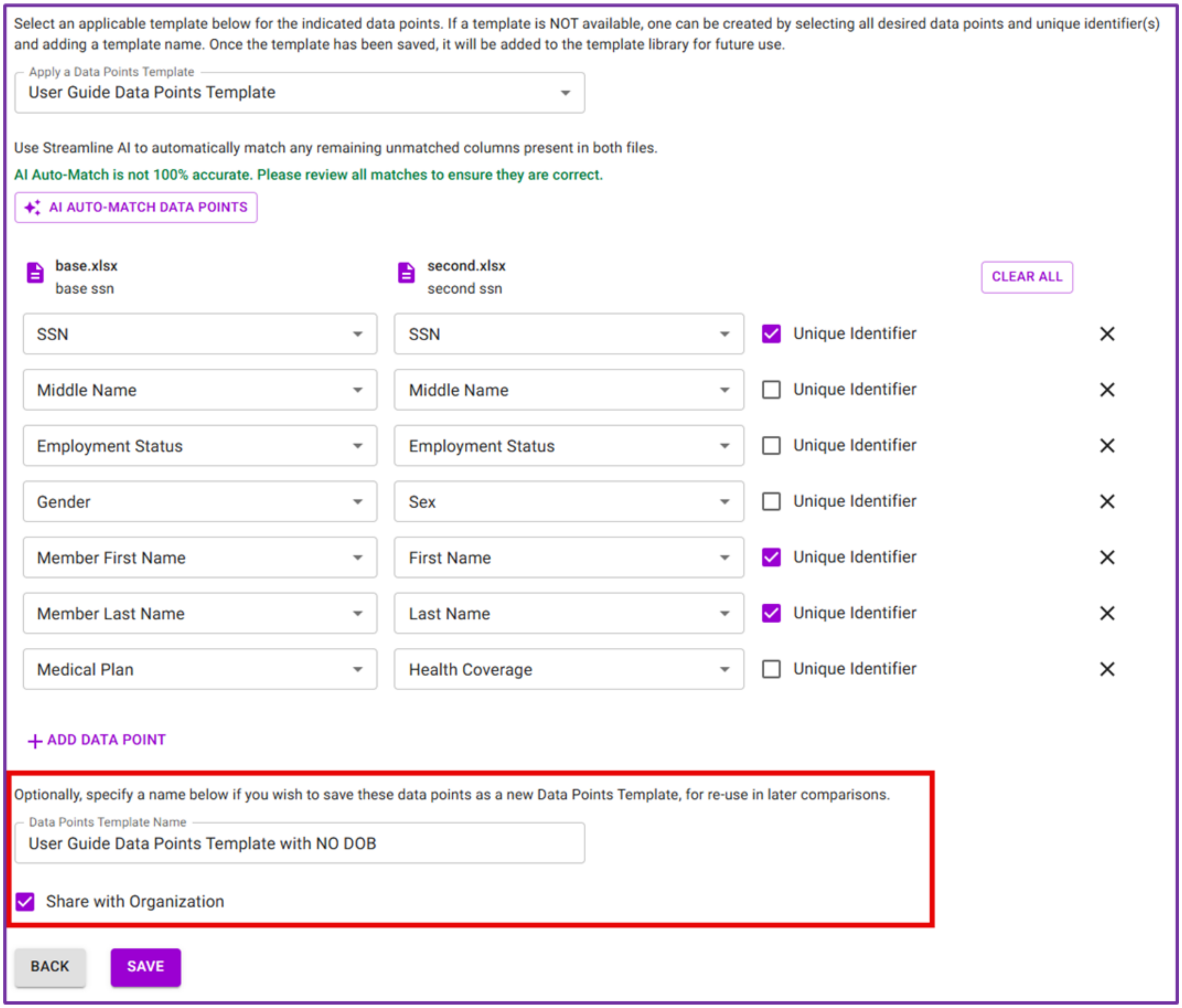


If no template is available, you can create one by selecting the desired data points and unique identifier(s), then entering a template name. Once saved, the template will be added to your library for future use and can optionally be shared with the organization for use across other companies.

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.



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.

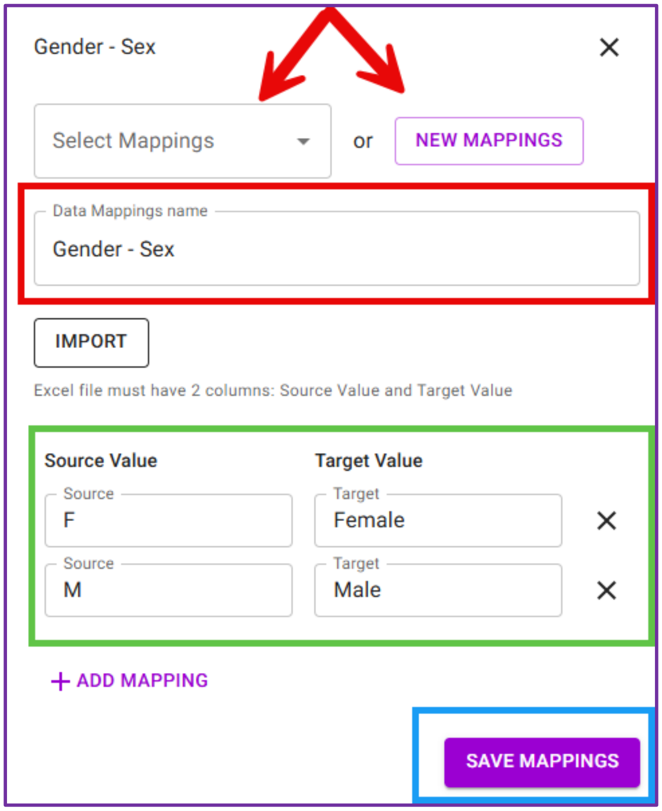
Mappings can be created several ways.

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

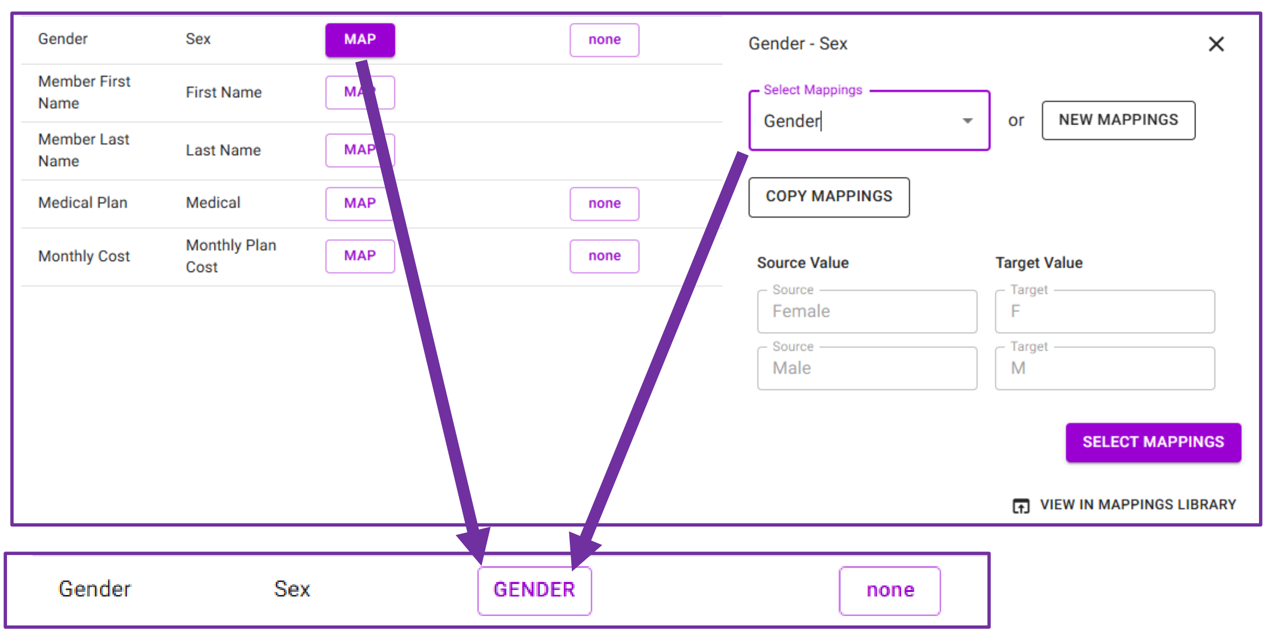
__To Manually create a mapping:__

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.



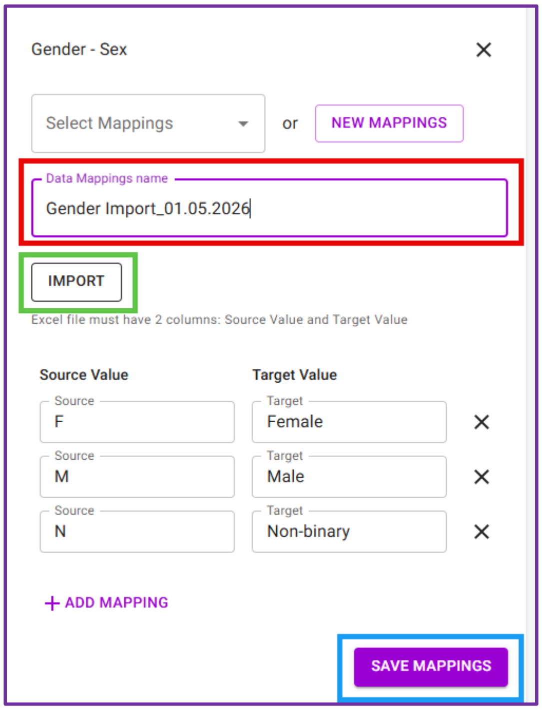
If you use existing mapping, click SELECT MAPPINGS.



To Import a mapping:

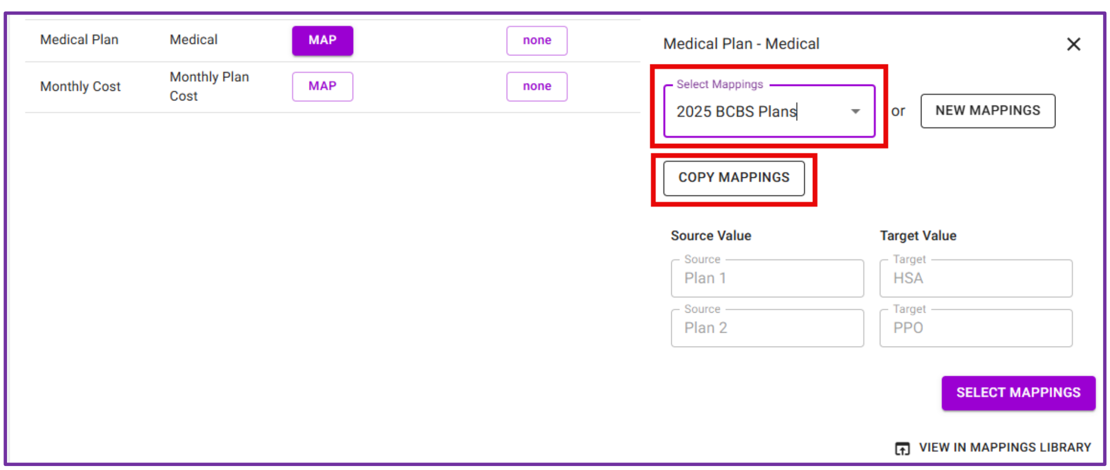
To add a new mapping, click **New Mappings**. Enter a mapping name, then select **Import**.
The import file may be a single-sheet Excel file or a CSV file. If you are using an Excel file with multiple sheets, the mapping **must** be on the first tab—otherwise, the import will fail.

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



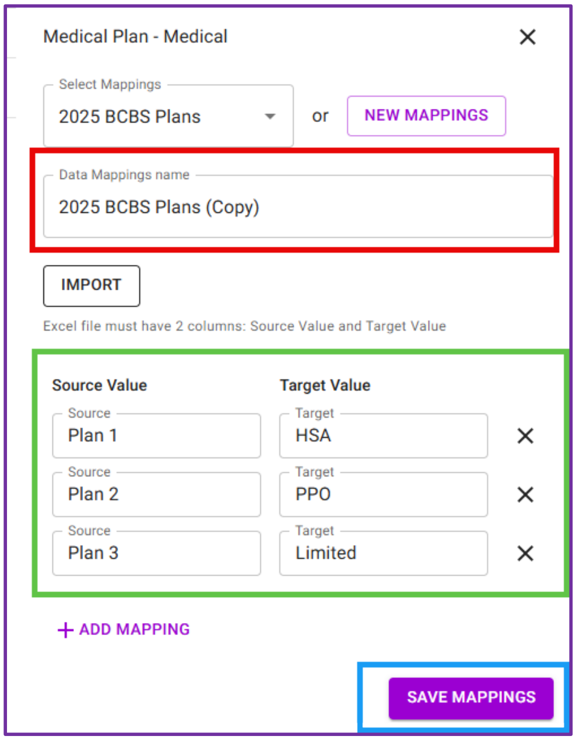
To Copy and modify an existing mapping:

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

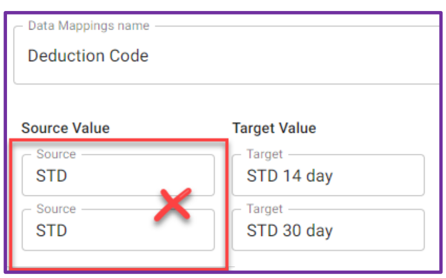


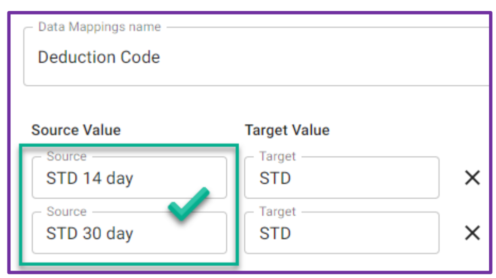
This creates a duplicate of the mapping with **(copy)** added to the name. You can then rename the mapping and add, update, or remove any source or target values as needed.

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



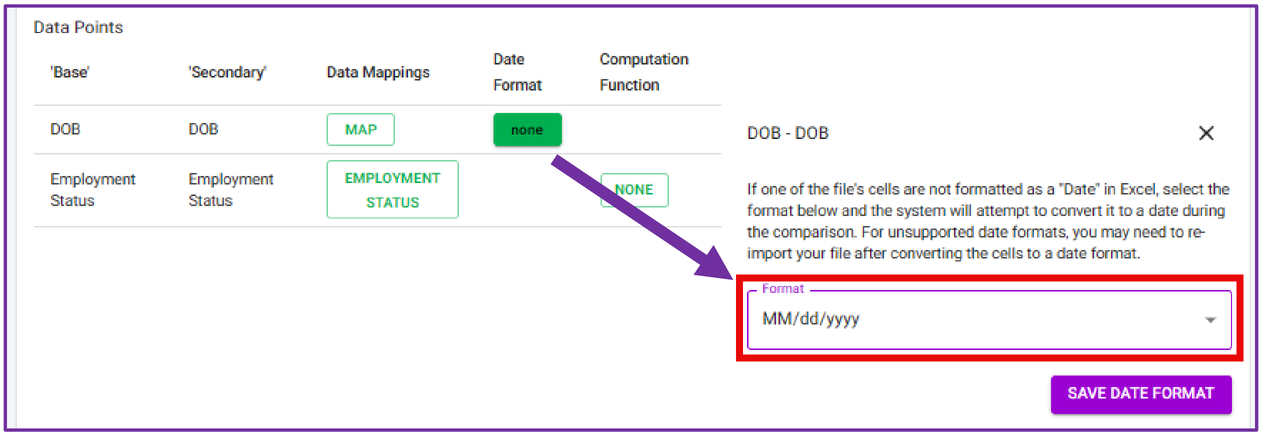
NOTE: The **SOURCE VALUE** in mapping must be unique. If the same value is used more than once under **SOURCE**, an error will occur. However, it is acceptable to use the same **TARGET VALUE** multiple times.





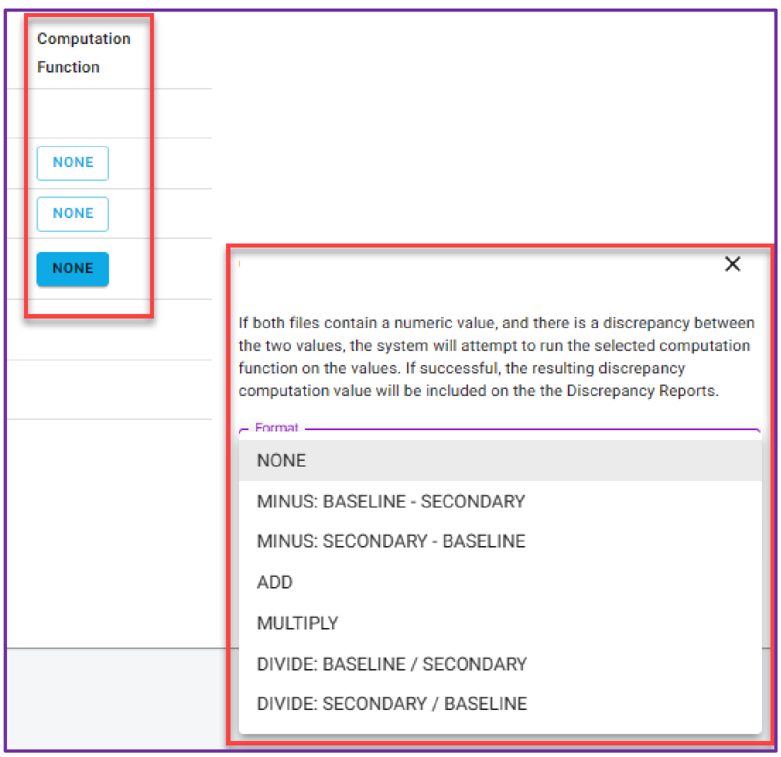
Mapping – Date Format

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.

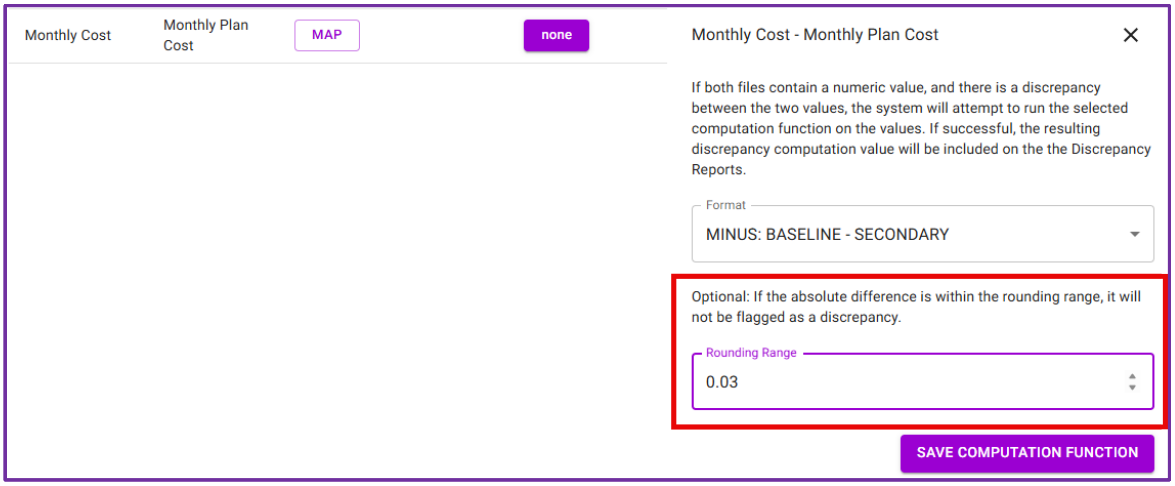


Mapping – Computation

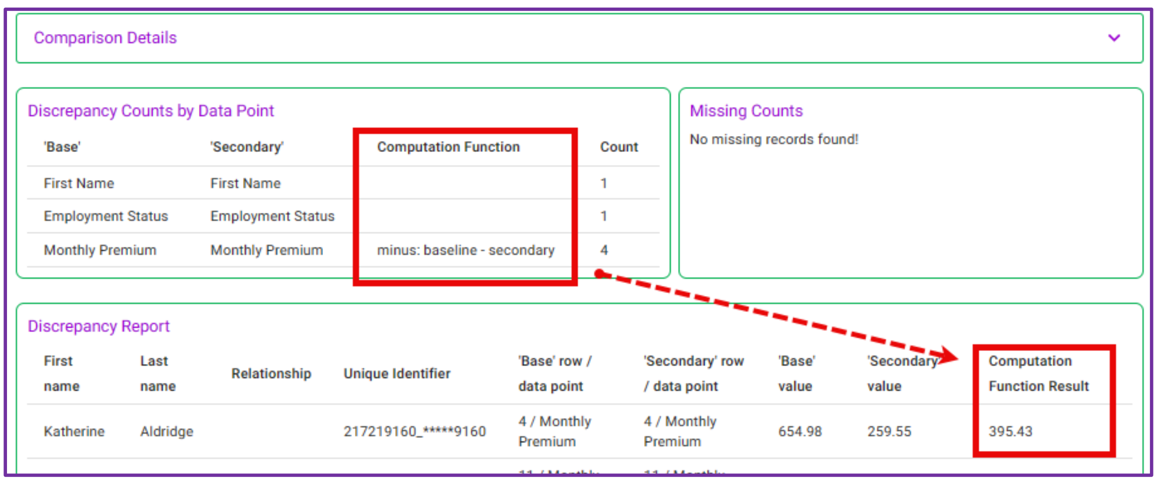
Add a computation (subtraction, addition, multiplication, division) to any numeric data point from the baseline file to any numeric data point in the secondary file. Add the computation by clicking the button under the Computation Function column for the desired data points and then selecting the function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



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.



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.

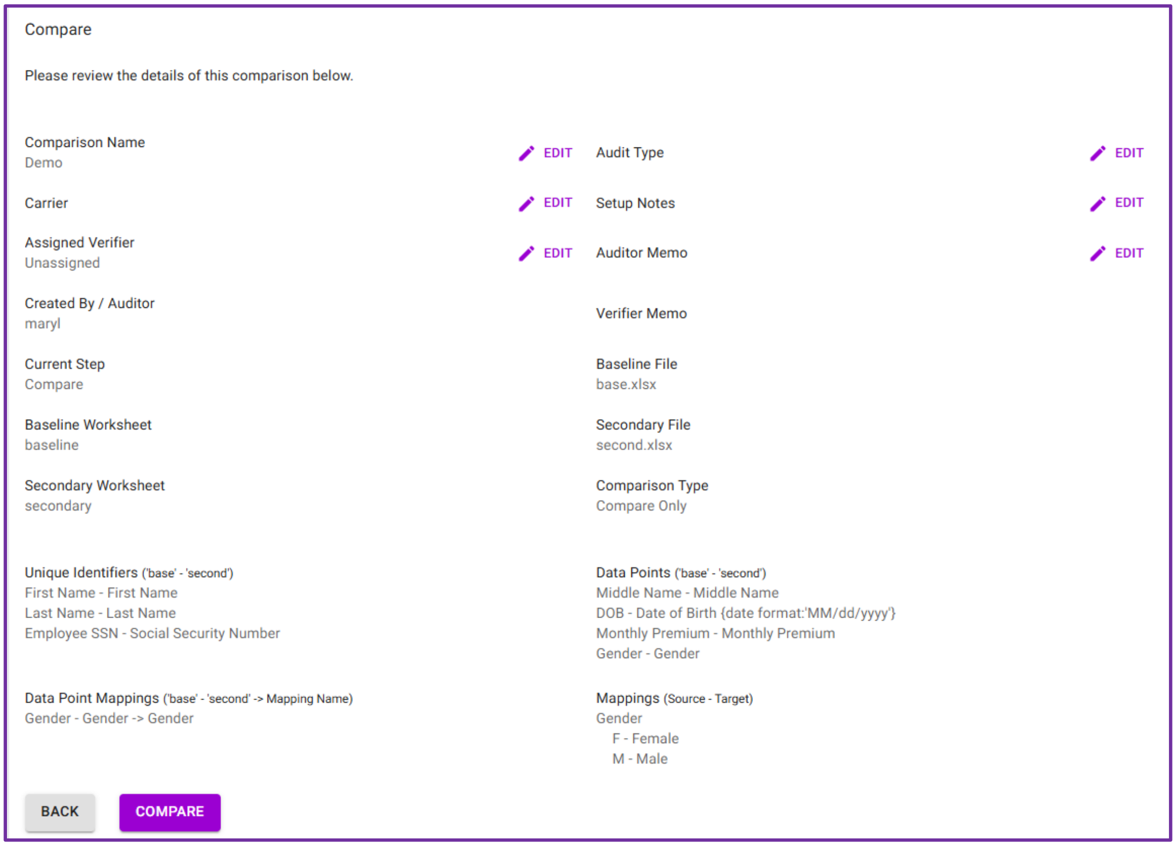


Note**:** This functionality applies **only to numeric fields**, and **only to data points that are *not* part of the unique identifier**.

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.

Comparison Name
Demo
EDIT

Audit Type
EDIT

Carrier
EDIT

Setup Notes
EDIT

Assigned Verifier
Unassigned
EDIT

Auditor Memo
EDIT

Created By / Auditor
maryl

Verifier Memo

Current Step
Compare

Baseline File
base.xlsx

Baseline Worksheet
baseline

Secondary File
second.xlsx

Secondary Worksheet
secondary

Comparison Type
Compare Only

Unique Identifiers ('base' - 'second')
First Name - First Name
Last Name - Last Name
Employee SSN - Social Security Number

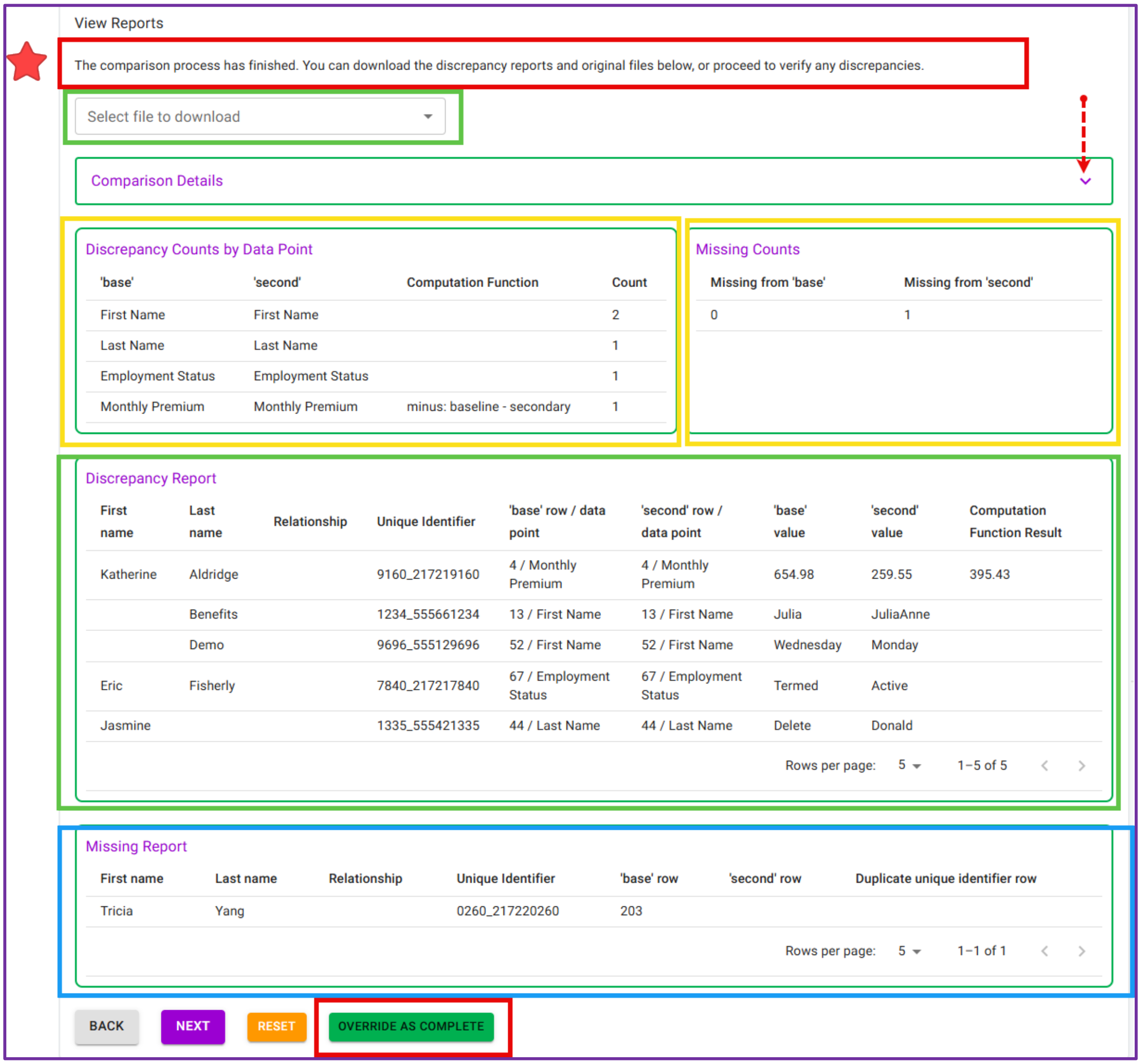
Data Points ('base' - 'second')
Middle Name - Middle Name
DOB - Date of Birth {date format:'MM/dd/yyyy'}
Monthly Premium - Monthly Premium
Gender - Gender

Data Point Mappings ('base' - 'second' -> Mapping Name)
Gender - Gender -> Gender

Mappings (Source - Target)
Gender
F - Female
M - Male

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.

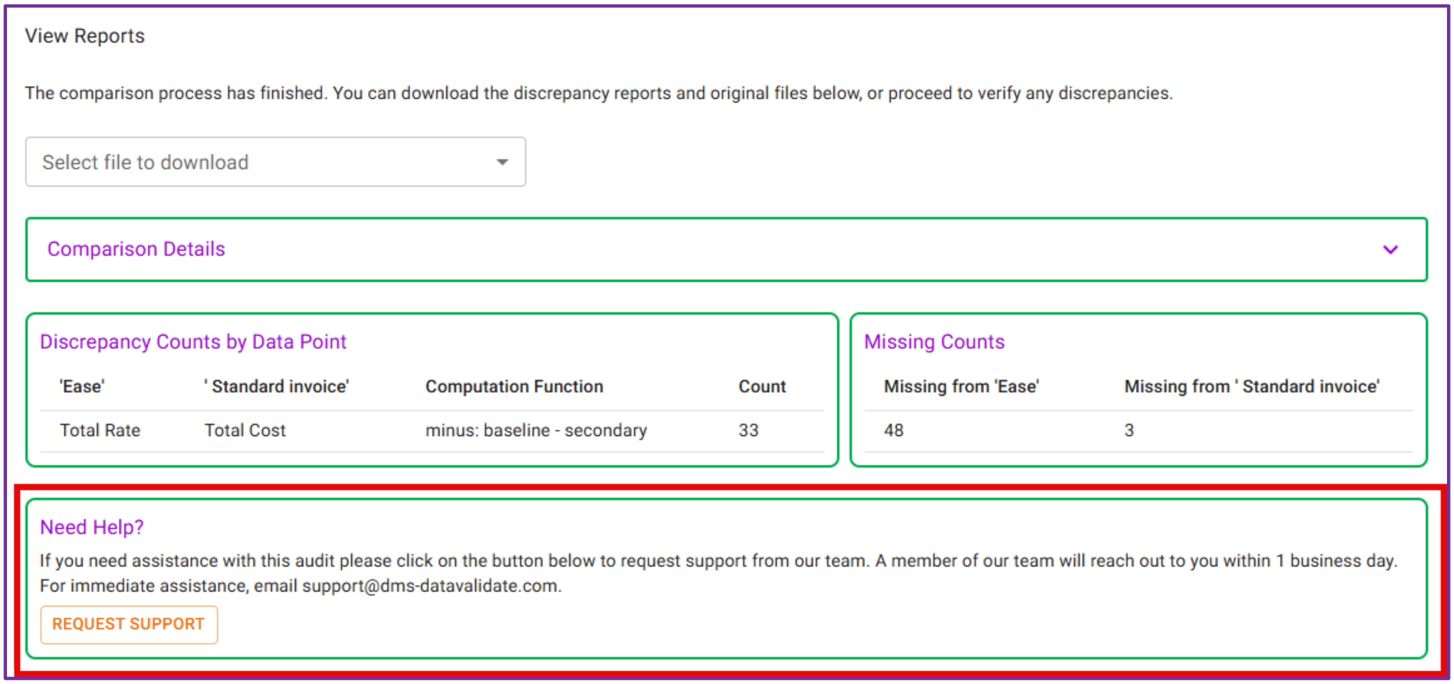


We've introduced a **Request Support** option on **Step 5 – Compare** for audits that return more than 30 discrepancies and/or missing items. This option appears only when that threshold is met.

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.

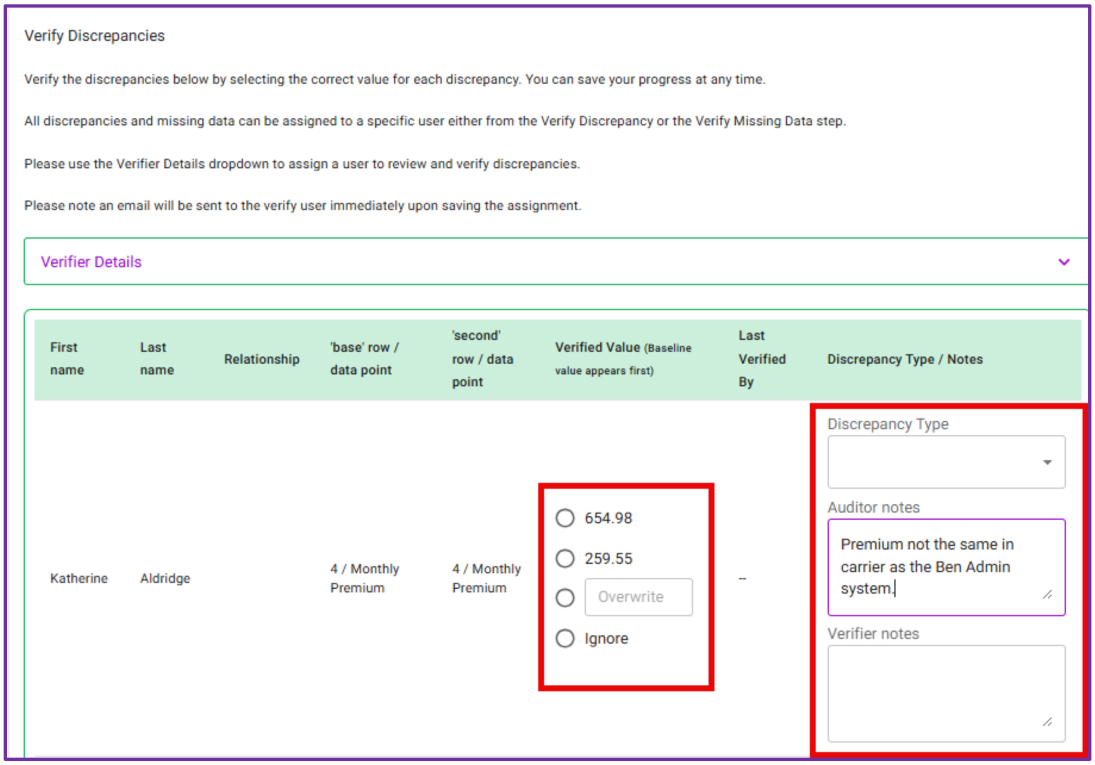
Please note that the **Streamline Support Team** is always available, regardless of audit results. If you need assistance at any time, you can contact us at **support@dms-datavalidate.com**.

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 comparision, 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.

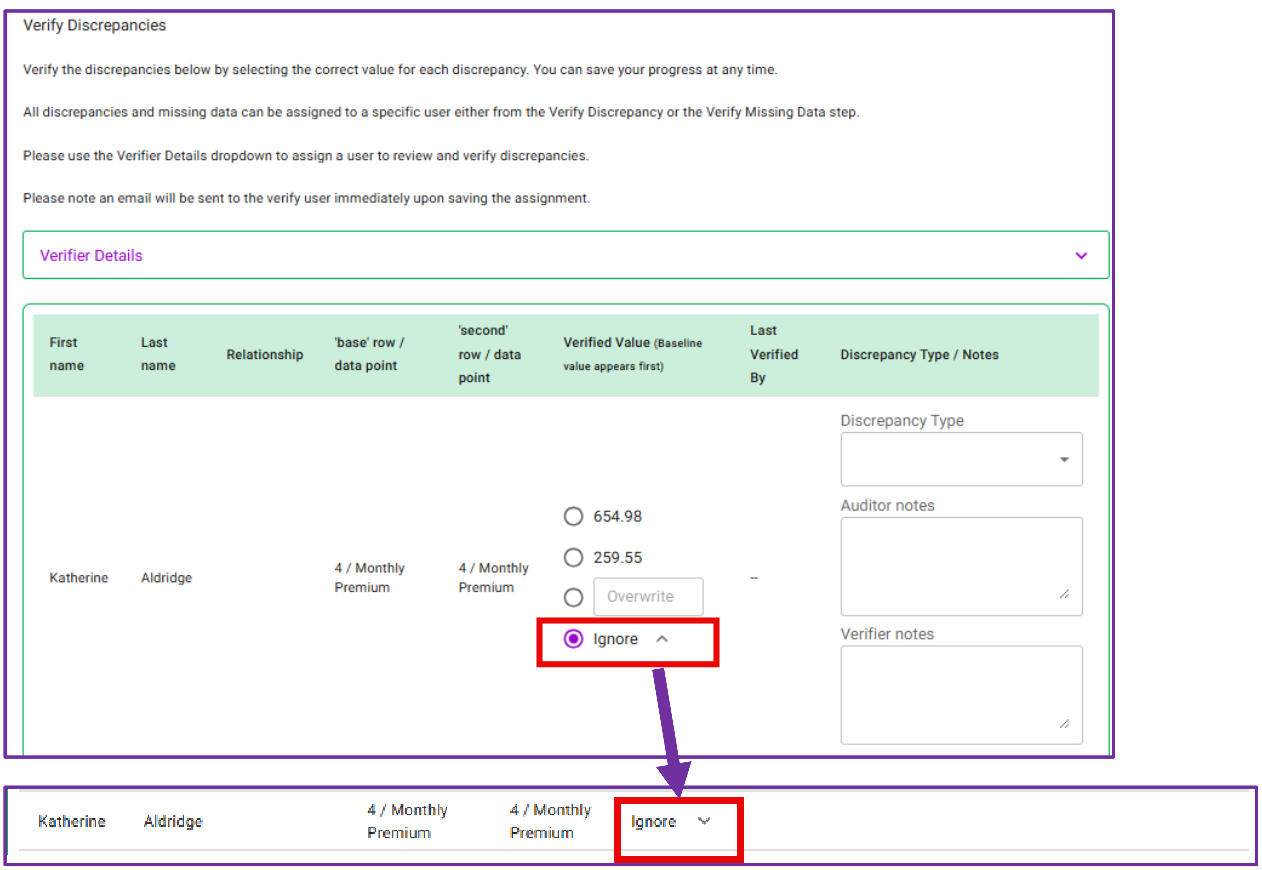


Verify Discrepancies

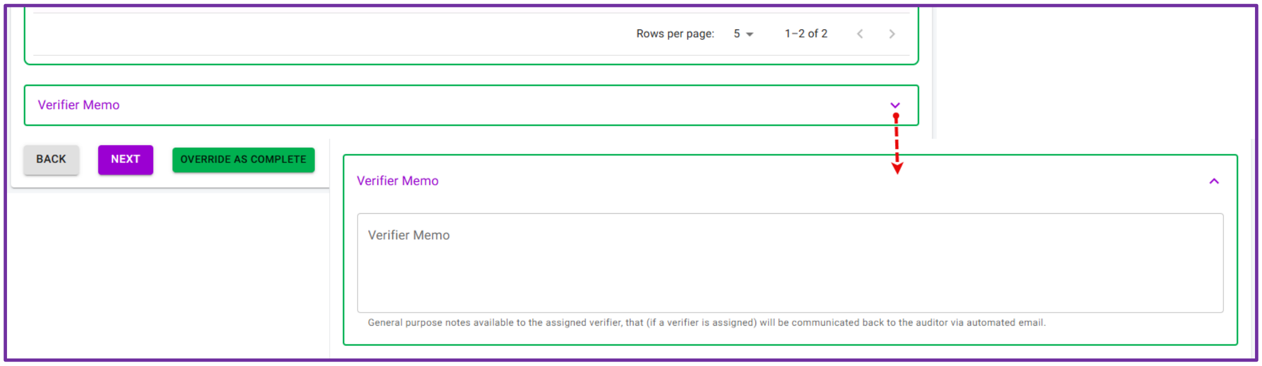
Verify Discrepancy Data entries are identified by the system when the unique identifier from one file is matched to an entry in the opposing file and one or more of the remaining data points do not match. Verify the data discrepancies by selecting the existing value, creating new, or ignoring. A discrepancy 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.



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 (^)

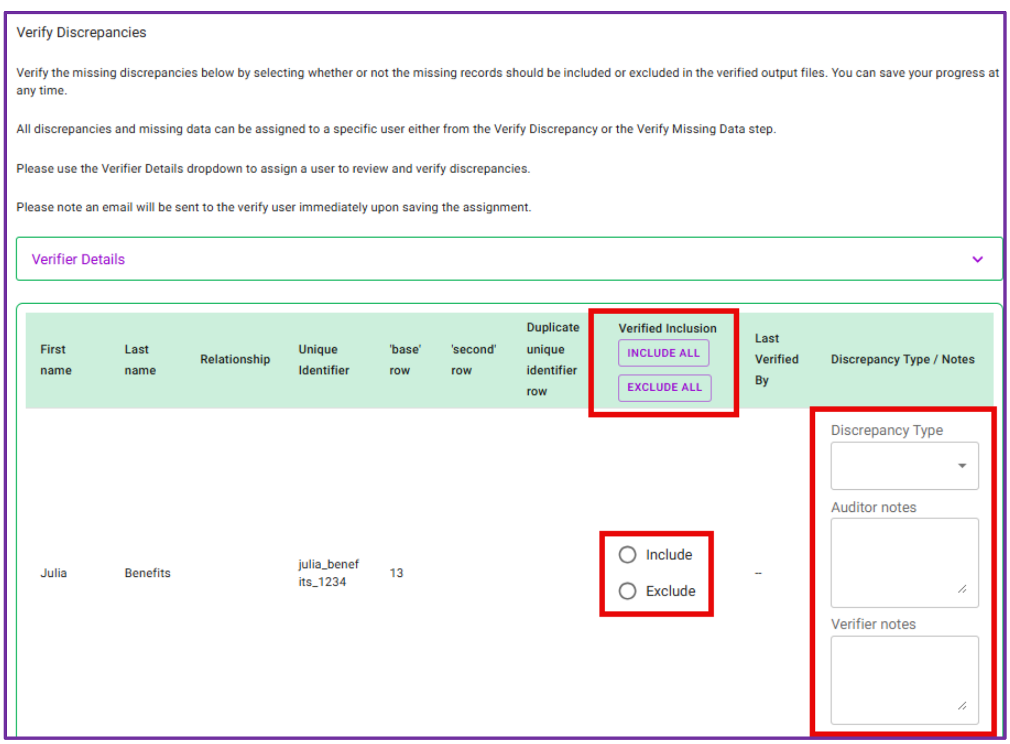


Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.

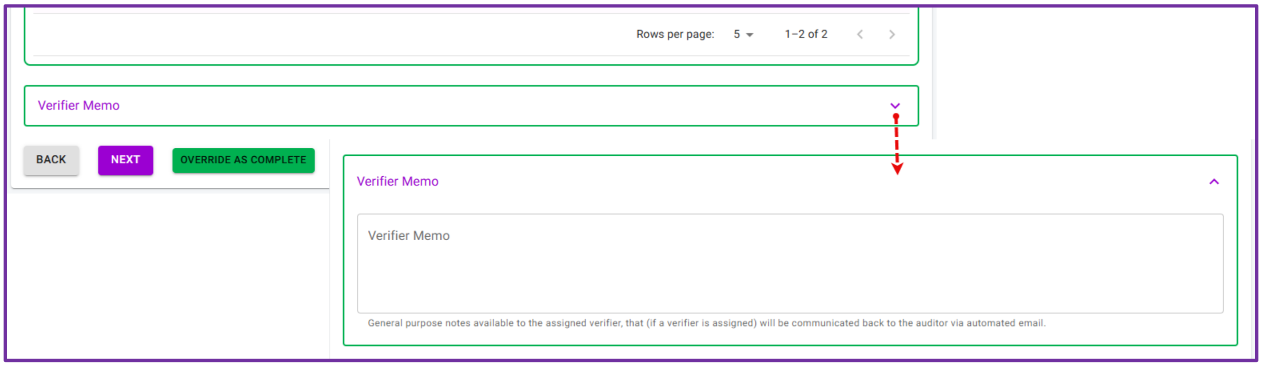


Verify Missing

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.

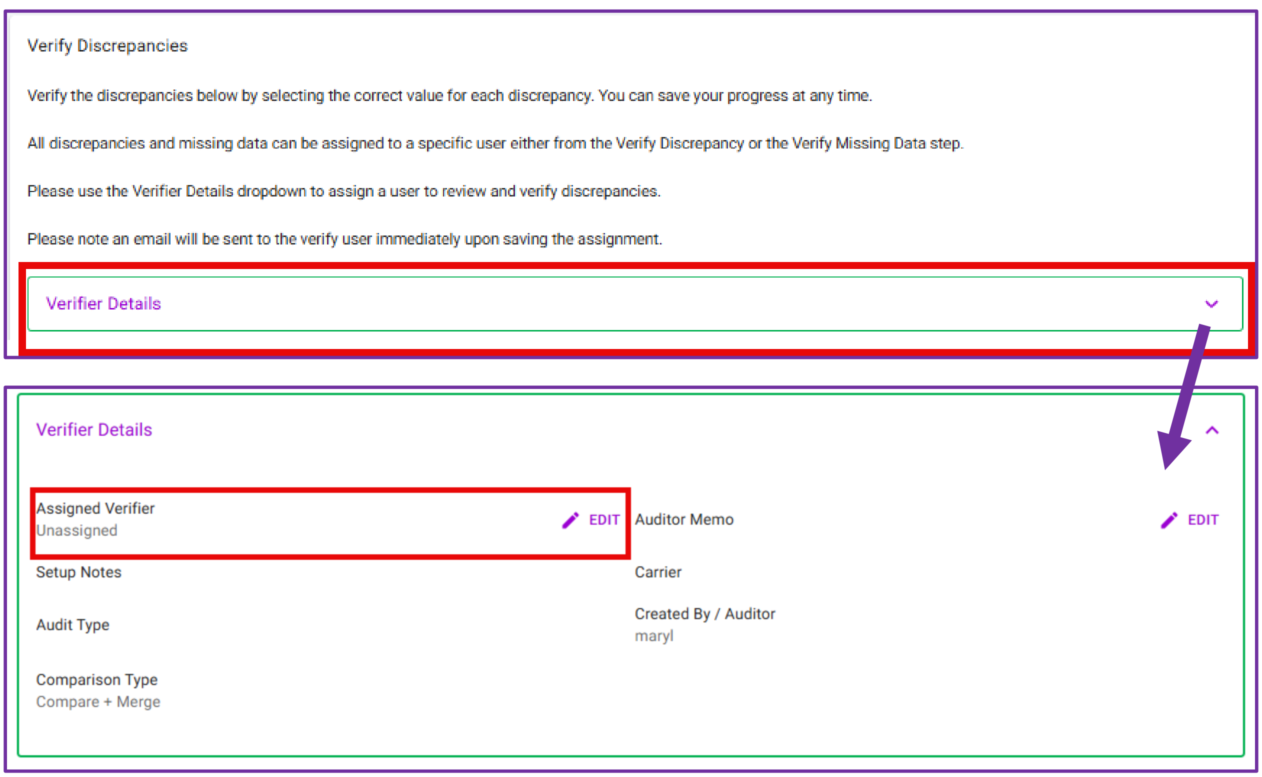


Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.



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.



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}.

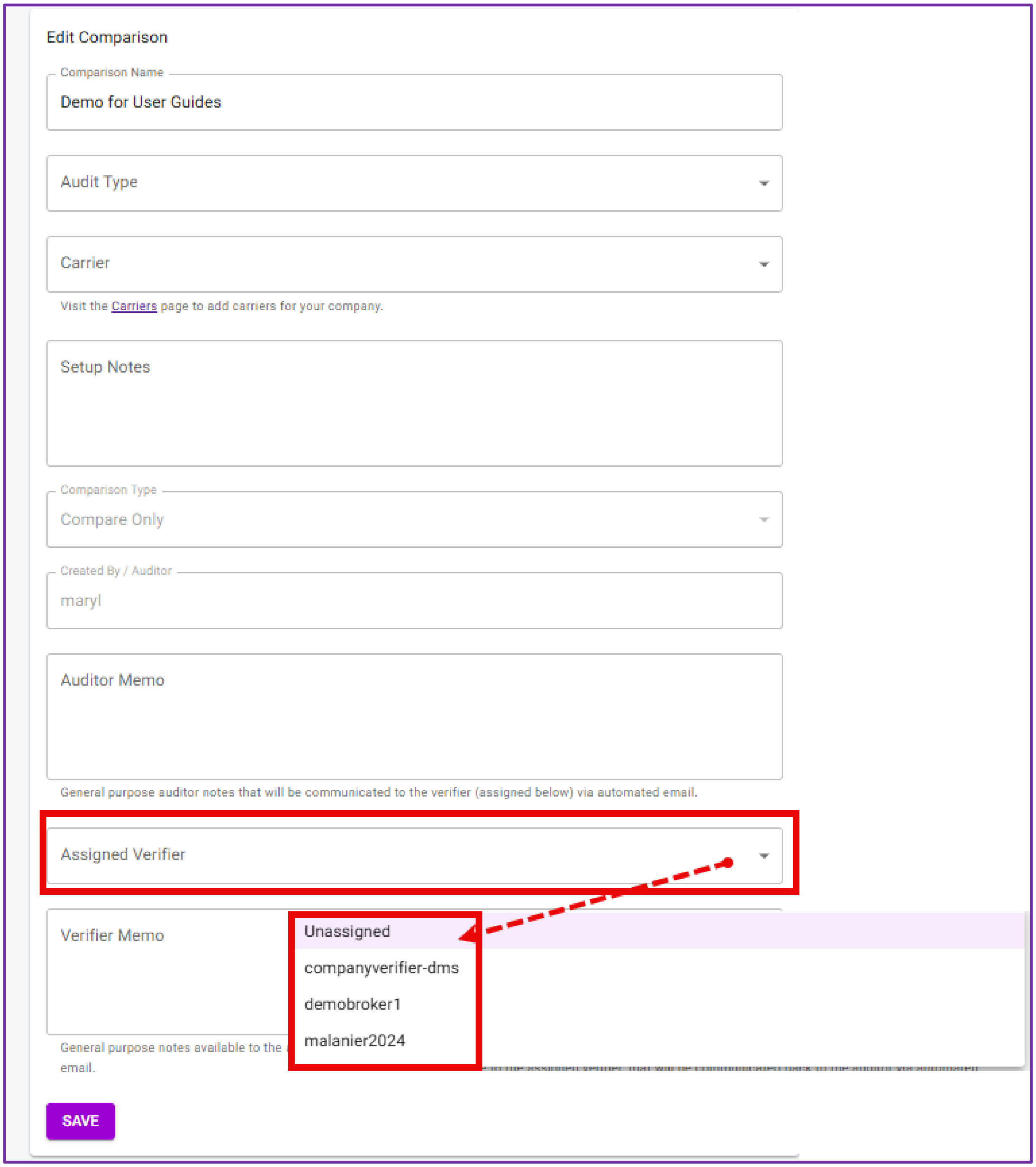
Please click here below to log in and complete the verification process for any discrepancies.

{Auditor Memo}

Thank you,

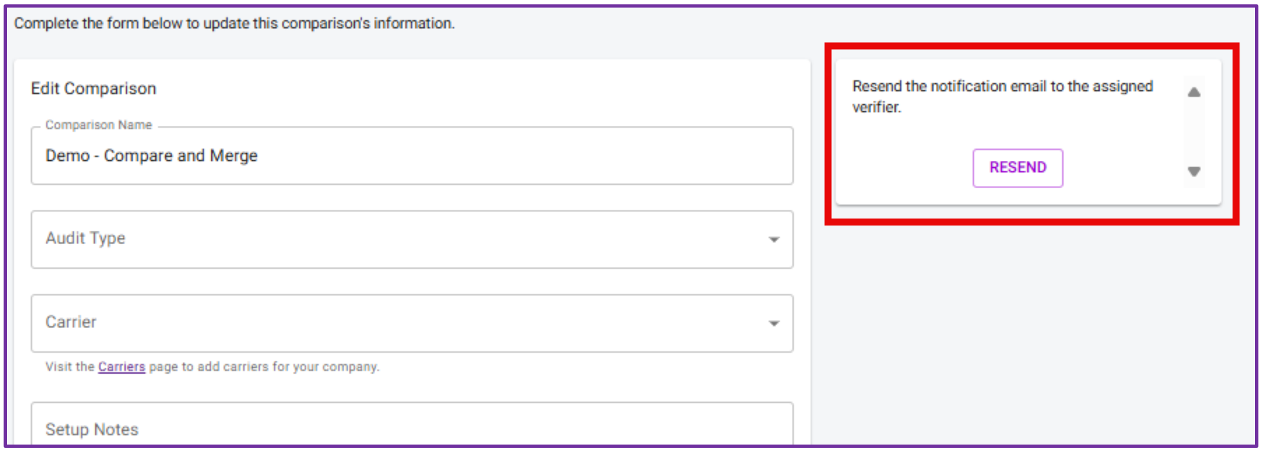
On behalf of {Auditor First Name and last Name}, {Organization Name if Org Level or Company Name if Company Level User}

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



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.



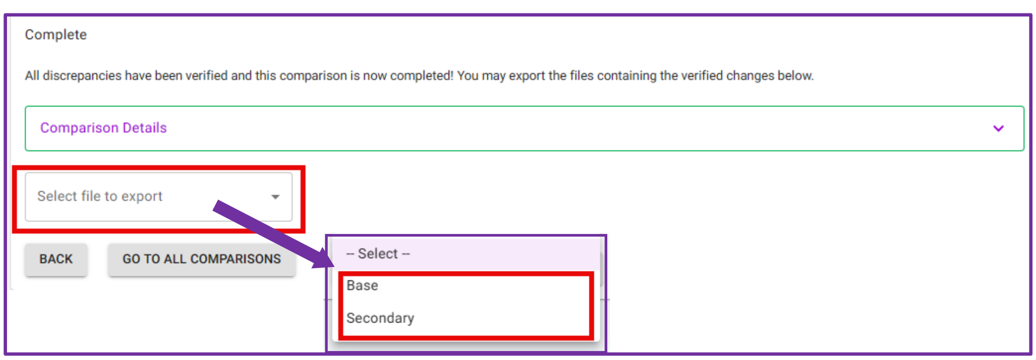
Complete the Compare

Data verification is complete.

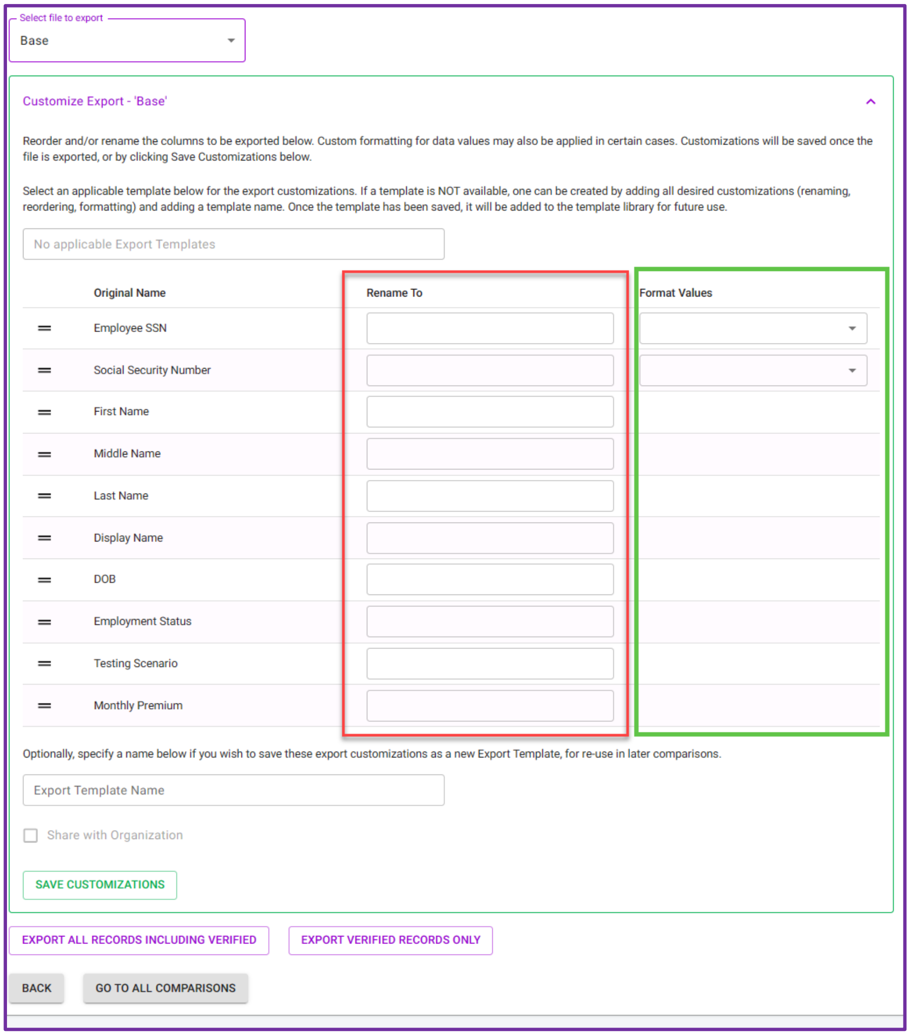
If the audit was assigned to a specific user within the application, the auditor will receive a notification email that the audit is complete.

> 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 **<u>will not be included</u>** in the Verified records only download. The ignored record will continue to show in the All records including verified download.

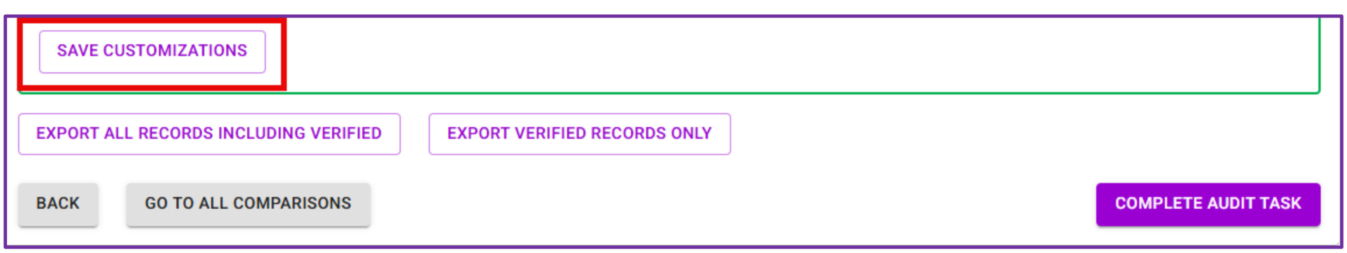


Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the application's key words. For a list of the keywords, please reference the Keys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



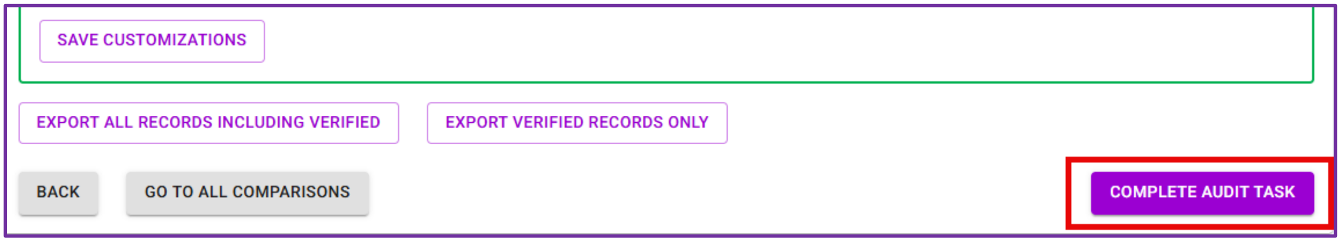
Column names can also be reordered by dragging and dropping data point in desired location.

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



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.

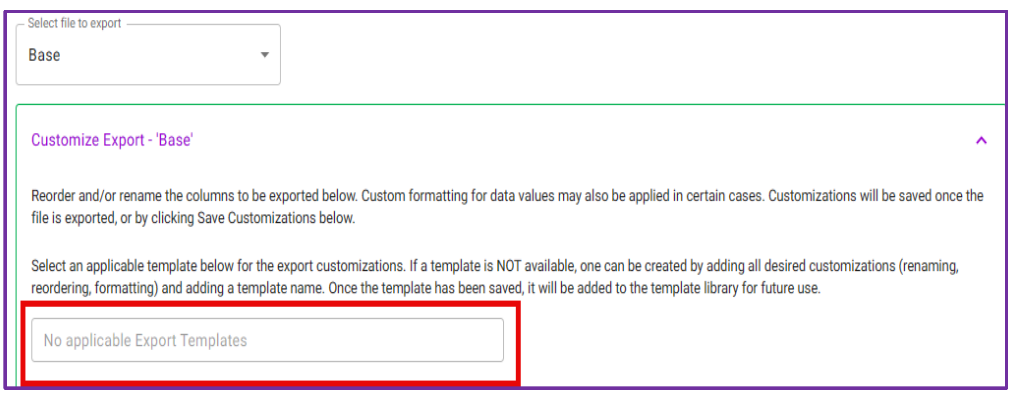


Export Template

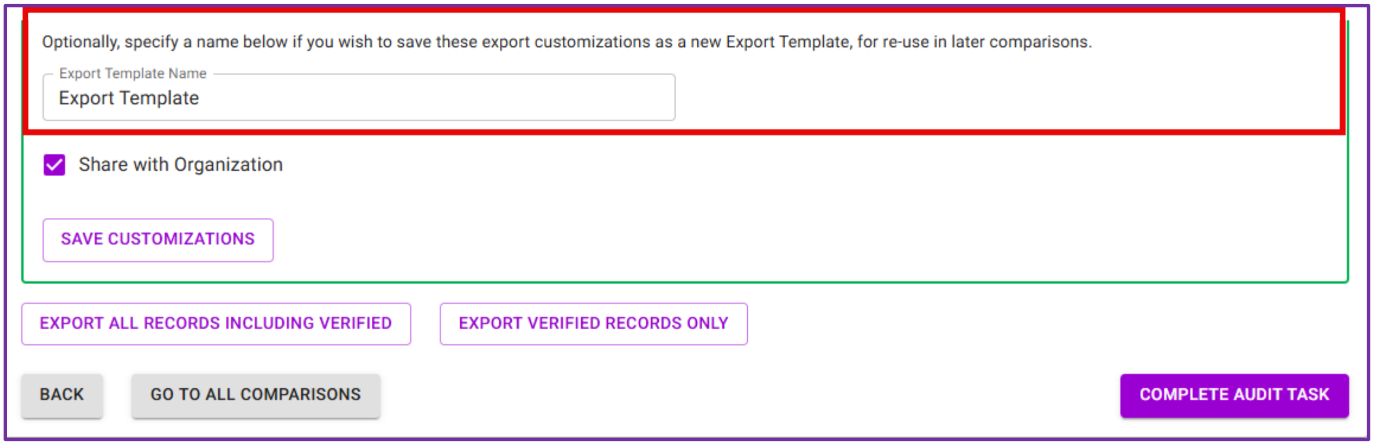
Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming 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:



Saving New Export Template:



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

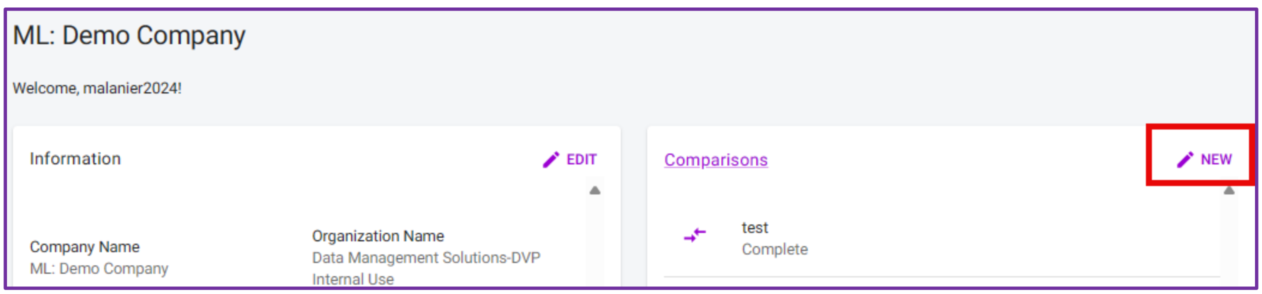
Questions: Contact Support@dms-datavalidate.com

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

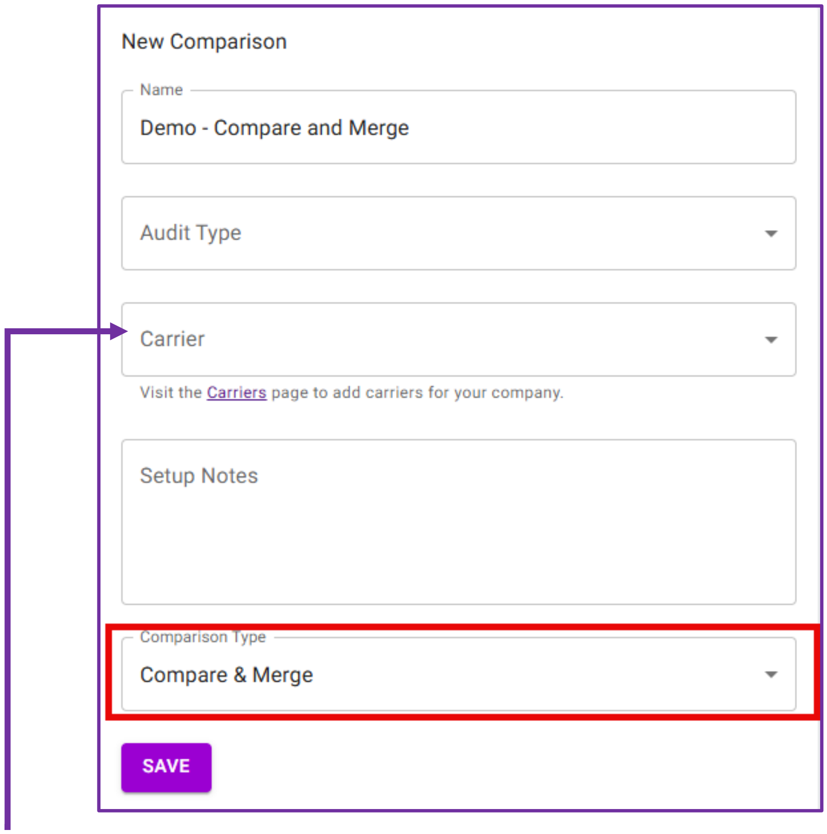
Select NEW to begin a new comparison.



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.

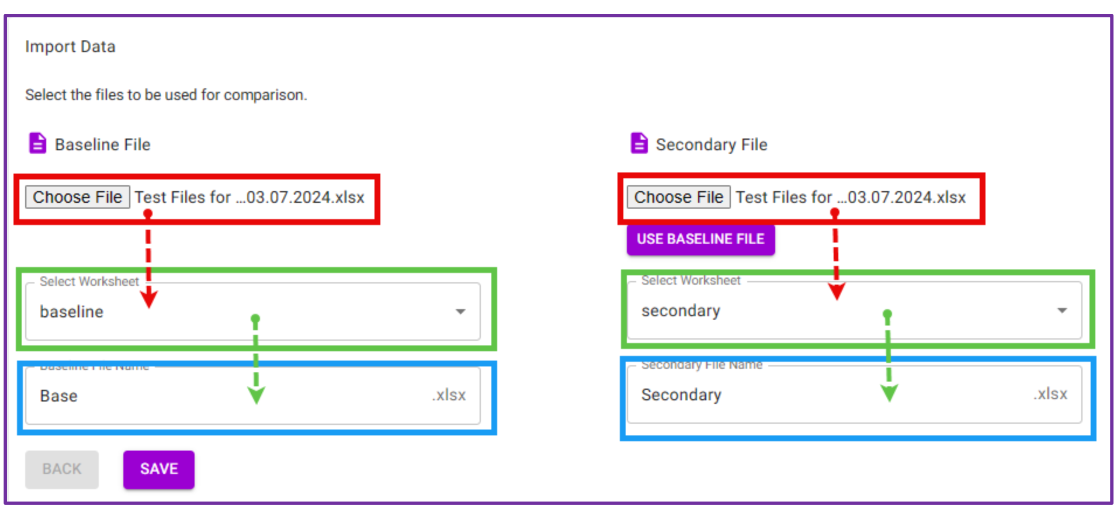
Please Note that once the comparison type is selected and saved, it cannot be changed.



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.

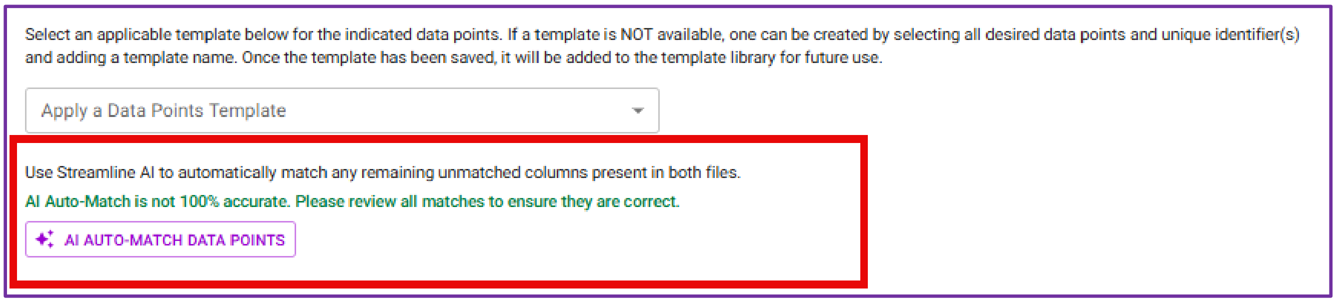


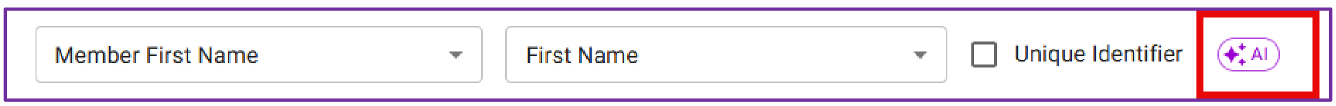
Select Data Points & Create Import Template

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.

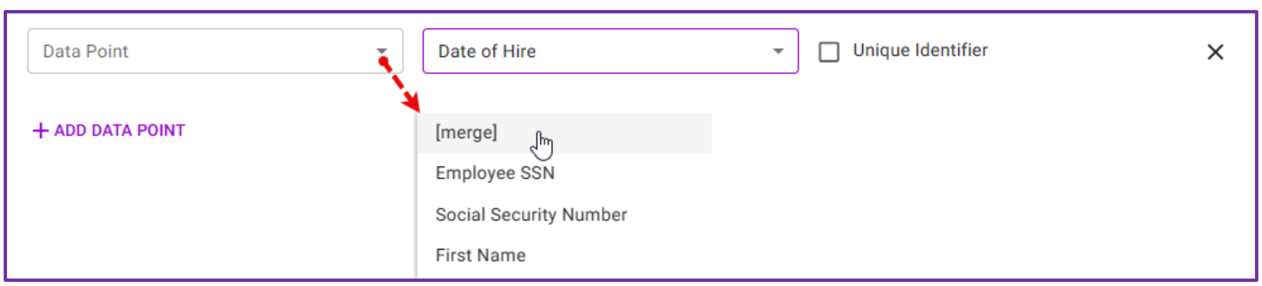
The option to use AI is available by selecting the **AI AUTO MATCH DATA POINTS** button. This will prompt the system to attempt to match any remaining data points. All AI-matched fields will display an AI icon beside the data point.





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



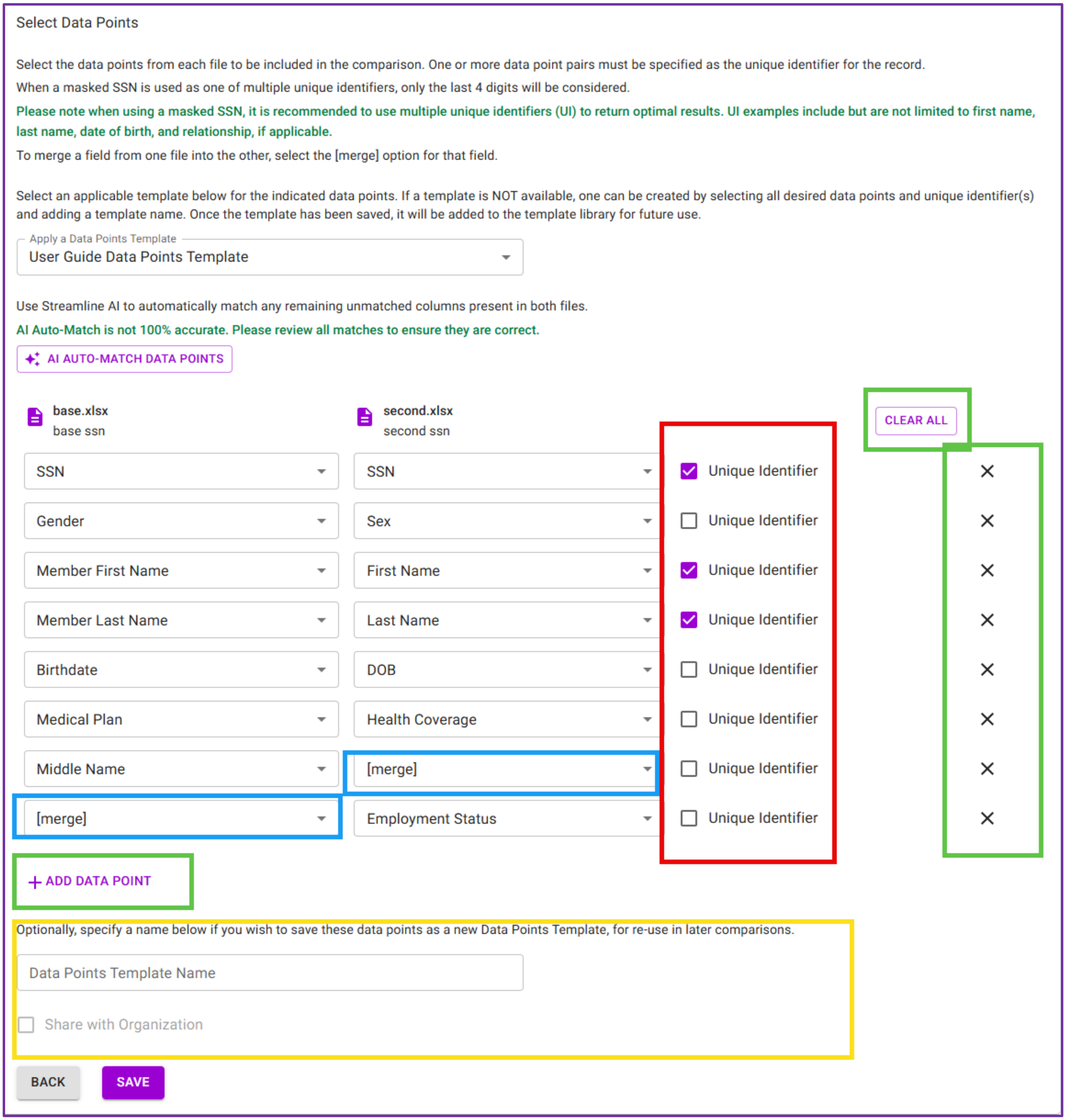
At least **one (1) unique identifier** must be selected. To remove all data points, click **CLEAR ALL**.

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.

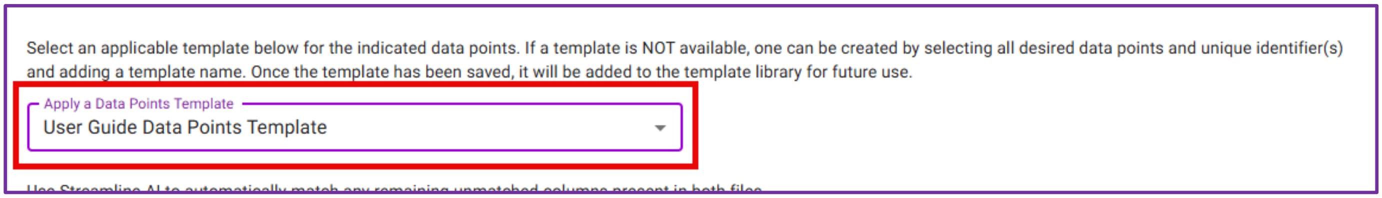
Company Admins (available under the Platinum Elite subscription) will only have access to templates created within their specific company.

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 & Reuse Existing Template

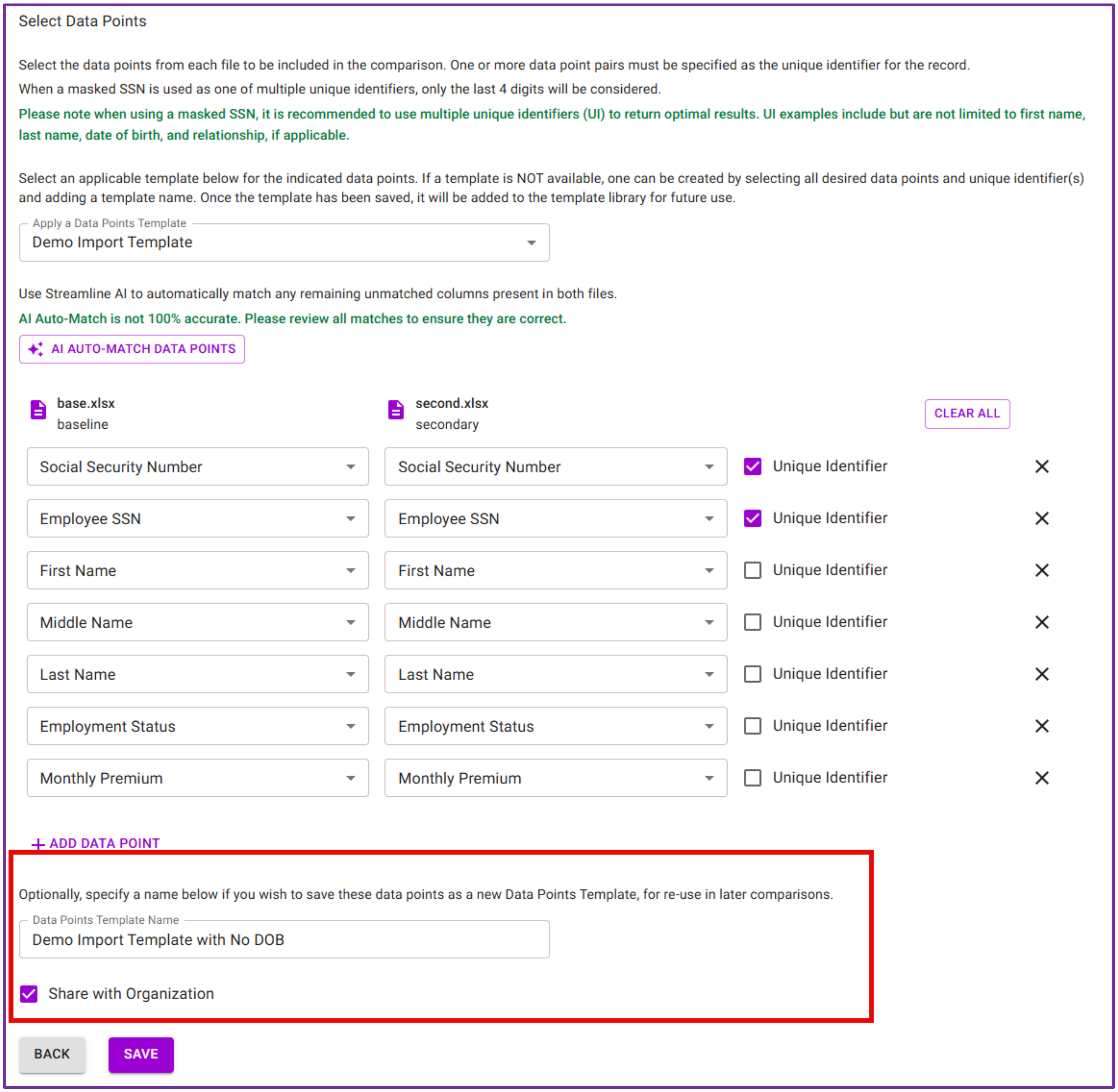
Select an applicable data points template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the import file column names. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding 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.



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.



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.

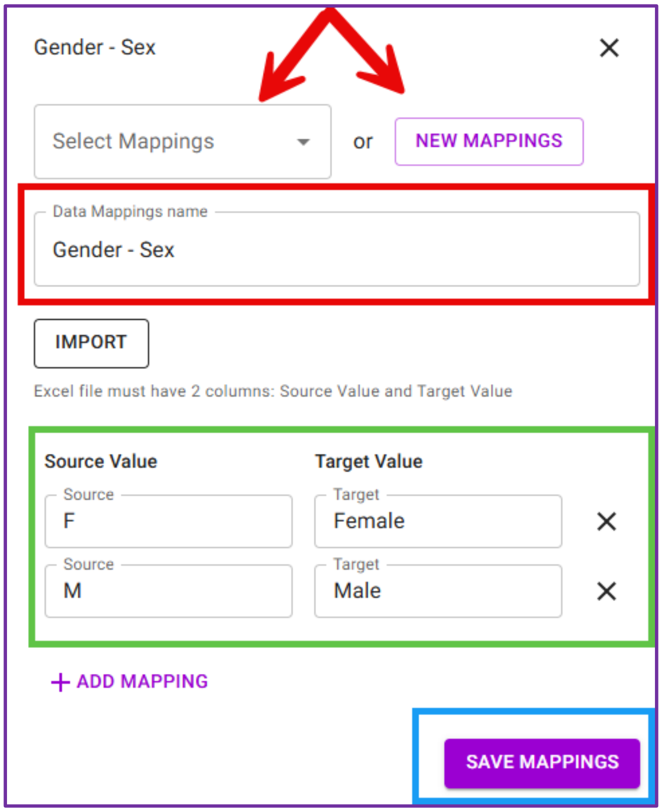
1. Manually create a mapping
2. Import a mapping

3. Copy and reuse an existing mapping

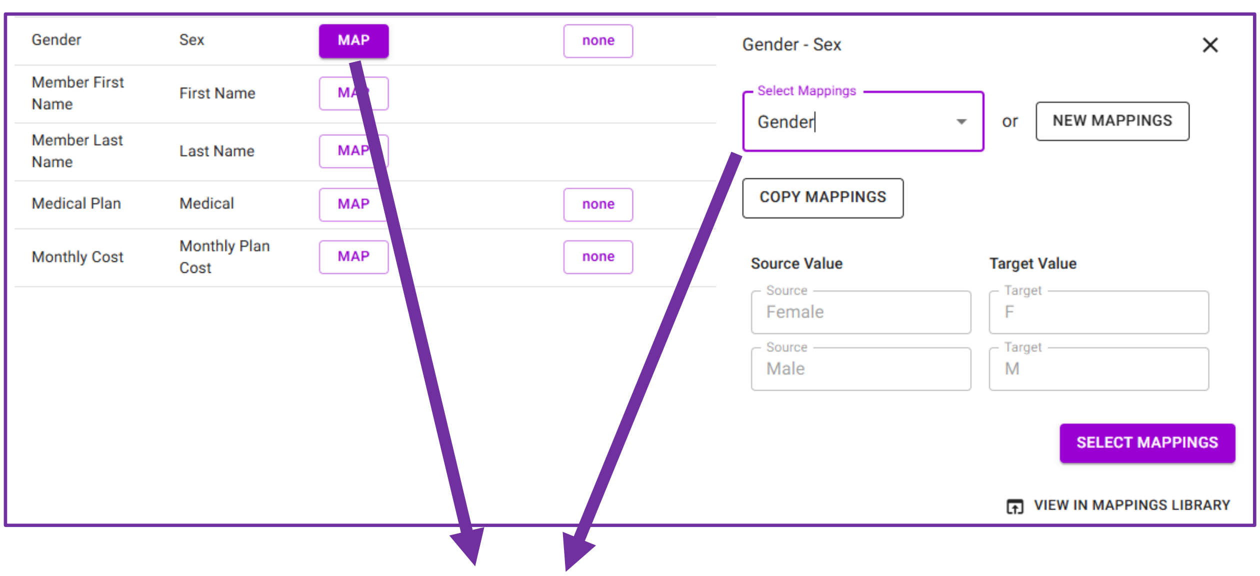
To Manually create a mapping:

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.



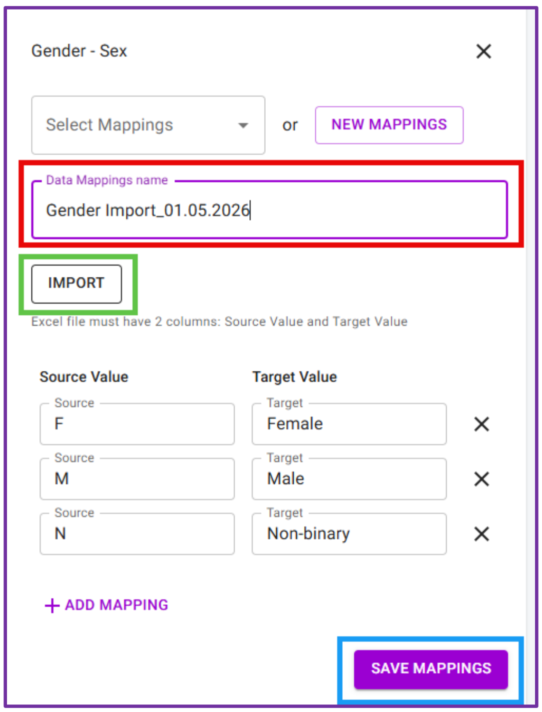
If you use existing mapping, click SELECT MAPPINGS.



To Import a mapping:

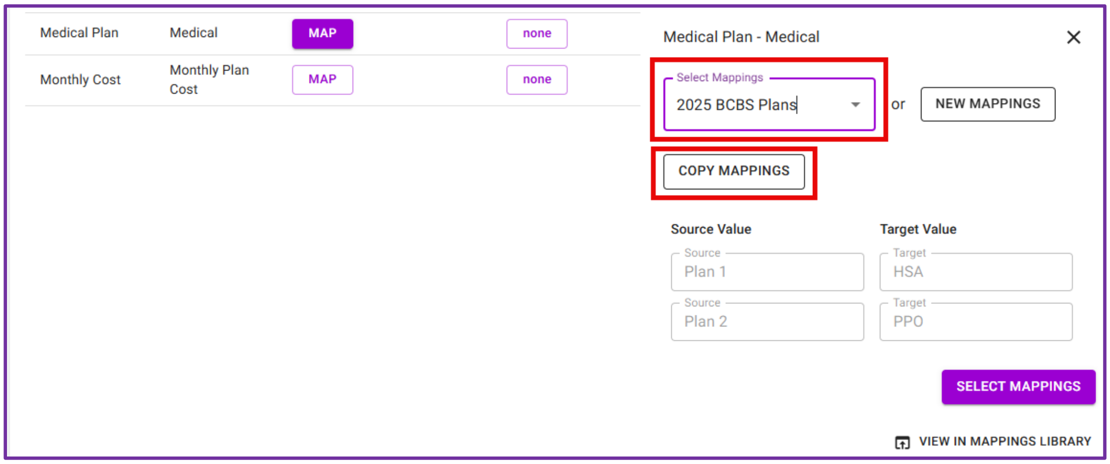
To add a new mapping, click **New Mappings**. Enter a mapping name, then select **Import**.
The import file may be a single-sheet Excel file or a CSV file. If you are using an Excel file with multiple sheets, the mapping **must** be on the first tab—otherwise, the import will fail.

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



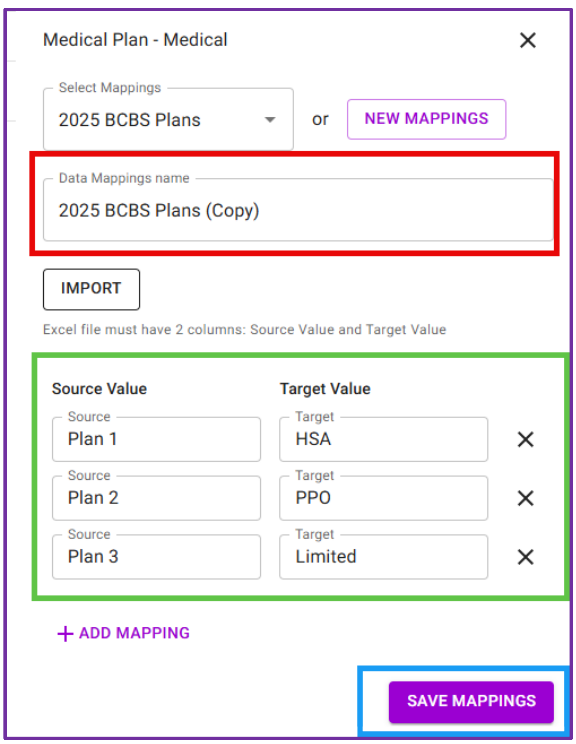
To Copy and modify an existing mapping:

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

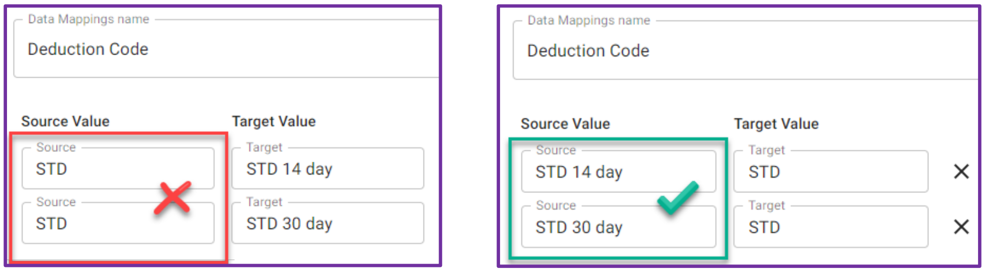


This creates a duplicate of the mapping with **(copy)** added to the name. You can then rename the mapping and add, update, or remove any source or target values as needed.

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

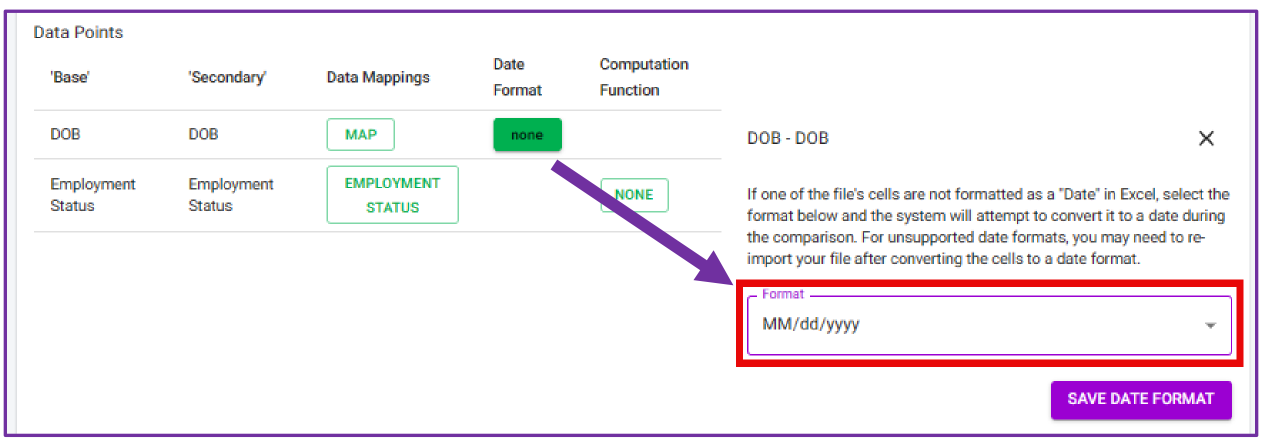


NOTE: The **SOURCE VALUE** in mapping must be unique. If the same value is used more than once under **SOURCE**, an error will occur. However, it is acceptable to use the same **TARGET VALUE** multiple times.



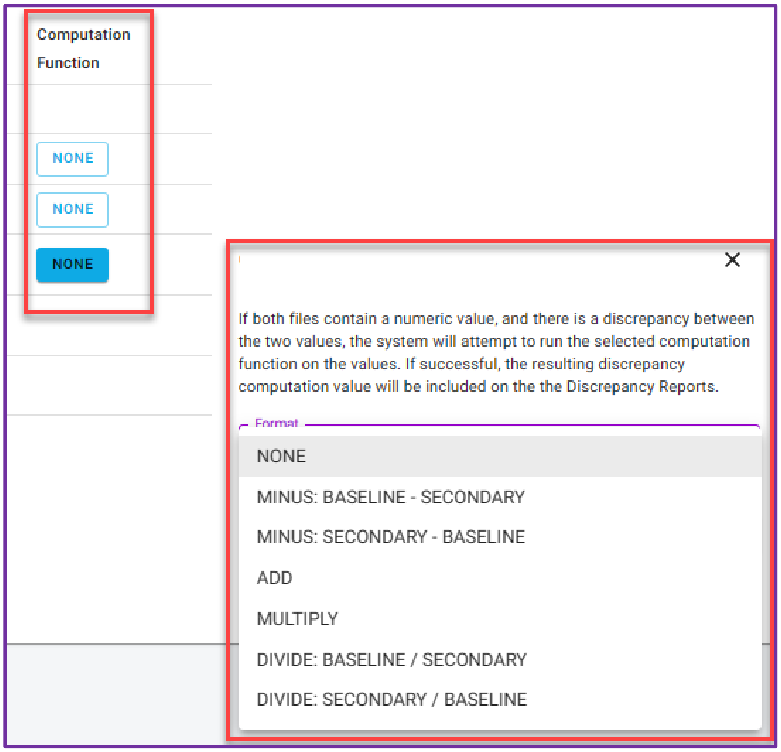
Mapping – Date Format

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.



Mapping – Computation

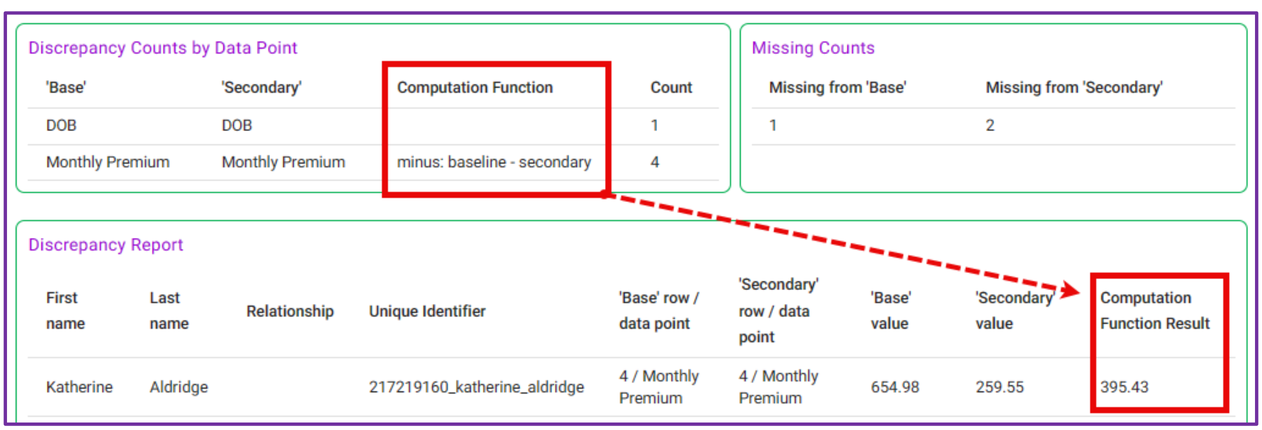
Add a computation (subtraction, addition, multiplication, division) to any numeric data point from the baseline file to any numeric data point in the secondary file. Add the computation by clicking the button under the Computation Function column for the desired data points and then selecting the function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

'Base'	'Secondary'	Computation Function	Count
DOB	DOB		1
Monthly Premium	Monthly Premium	minus: baseline - secondary	4

Missing Counts

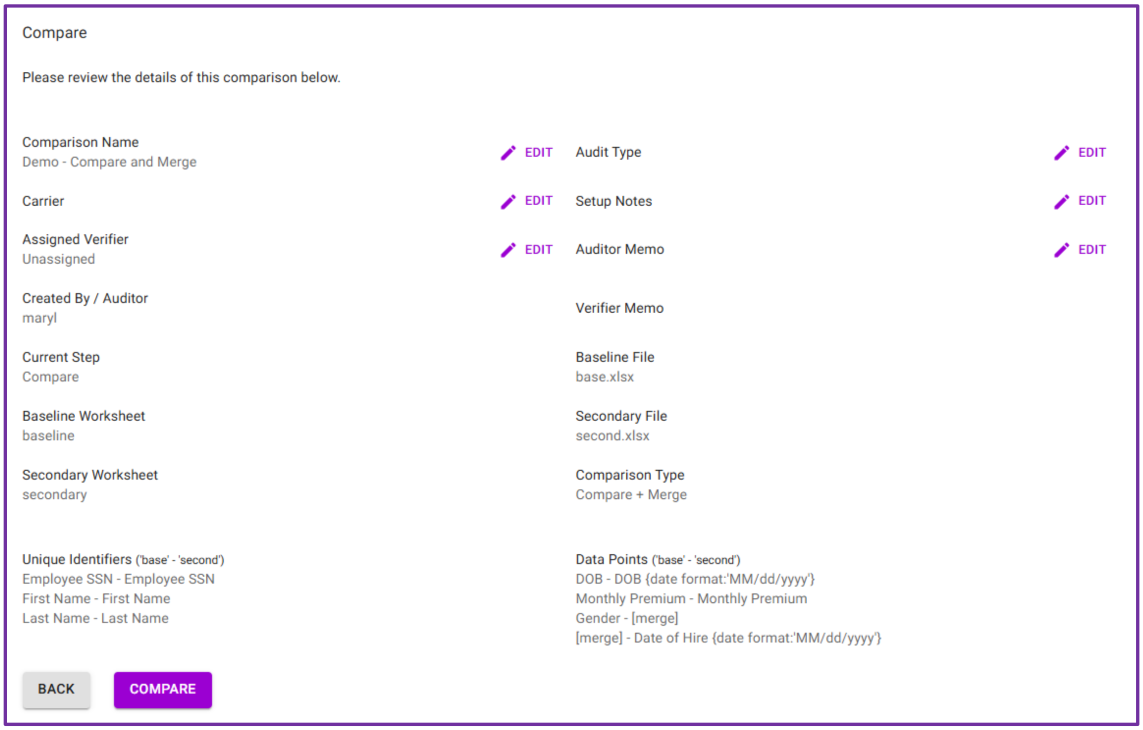
Missing from 'Base'	Missing from 'Secondary'
1	2

Discrepancy Report

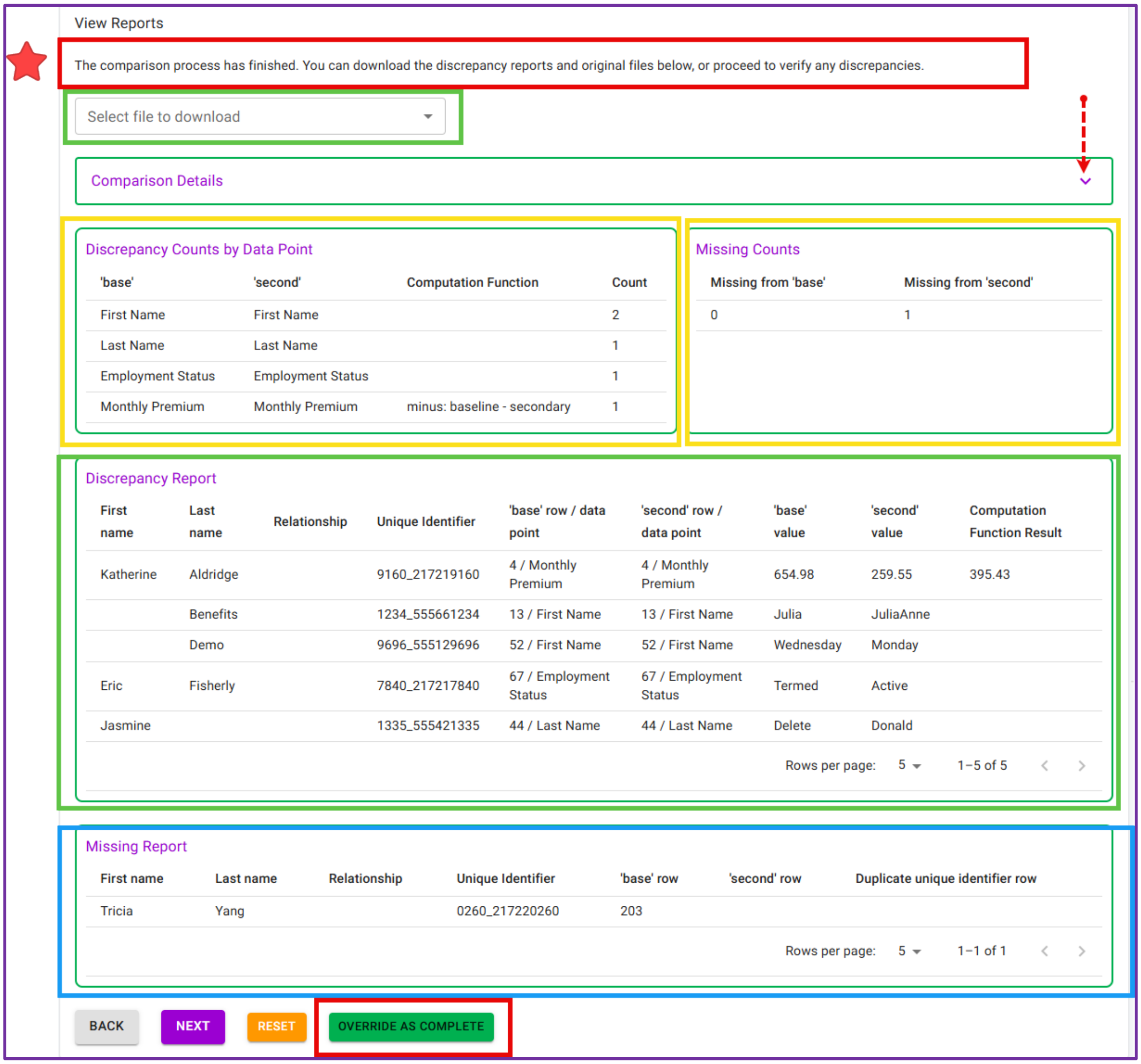
First name	Last name	Relationship	Unique Identifier	'Base' row / data point	'Secondary' row / data point	'Base' value	'Secondary' value	Computation Function Result
Katherine	Aldridge		217219160_katherine_aldridge	4 / Monthly Premium	4 / Monthly Premium	654.98	259.55	395.43

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 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.

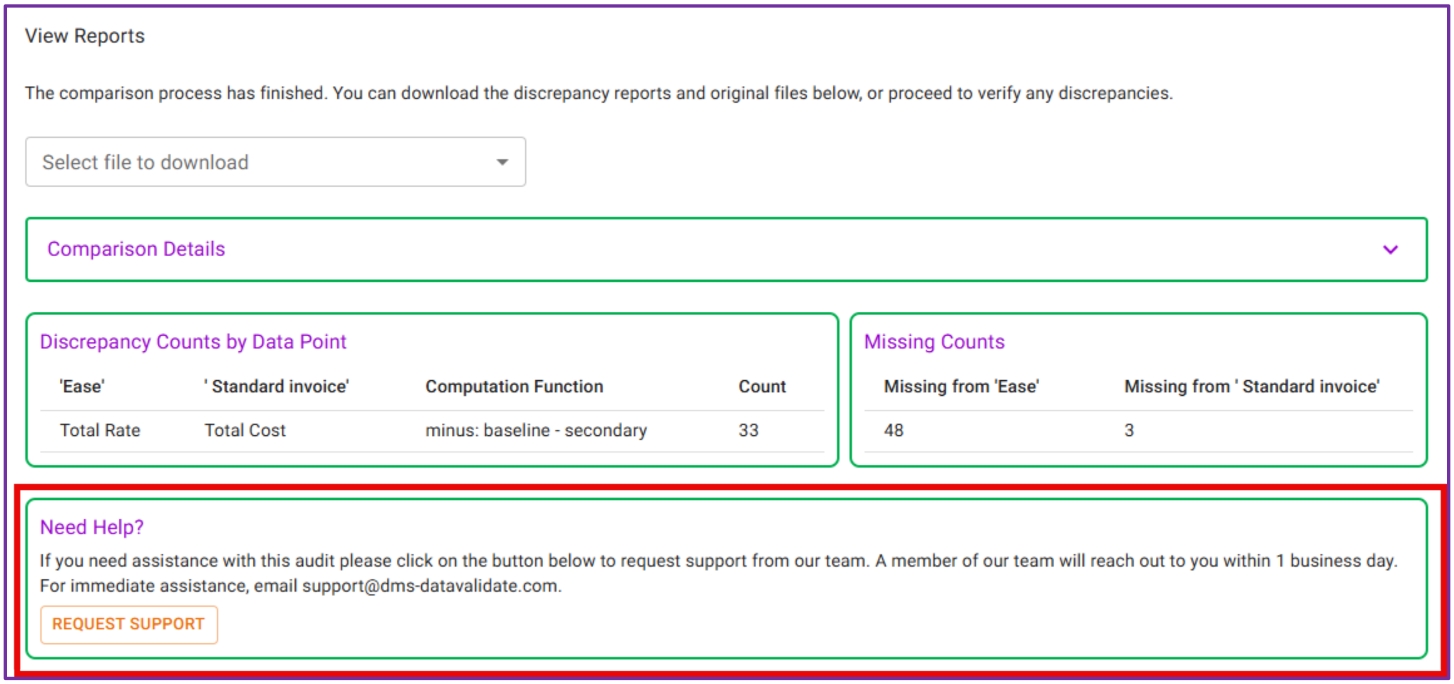


We've introduced a **Request Support** option on **Step 5 – Compare** for audits that return more than 30 discrepancies and/or missing items. This option appears only when that threshold is met.

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.

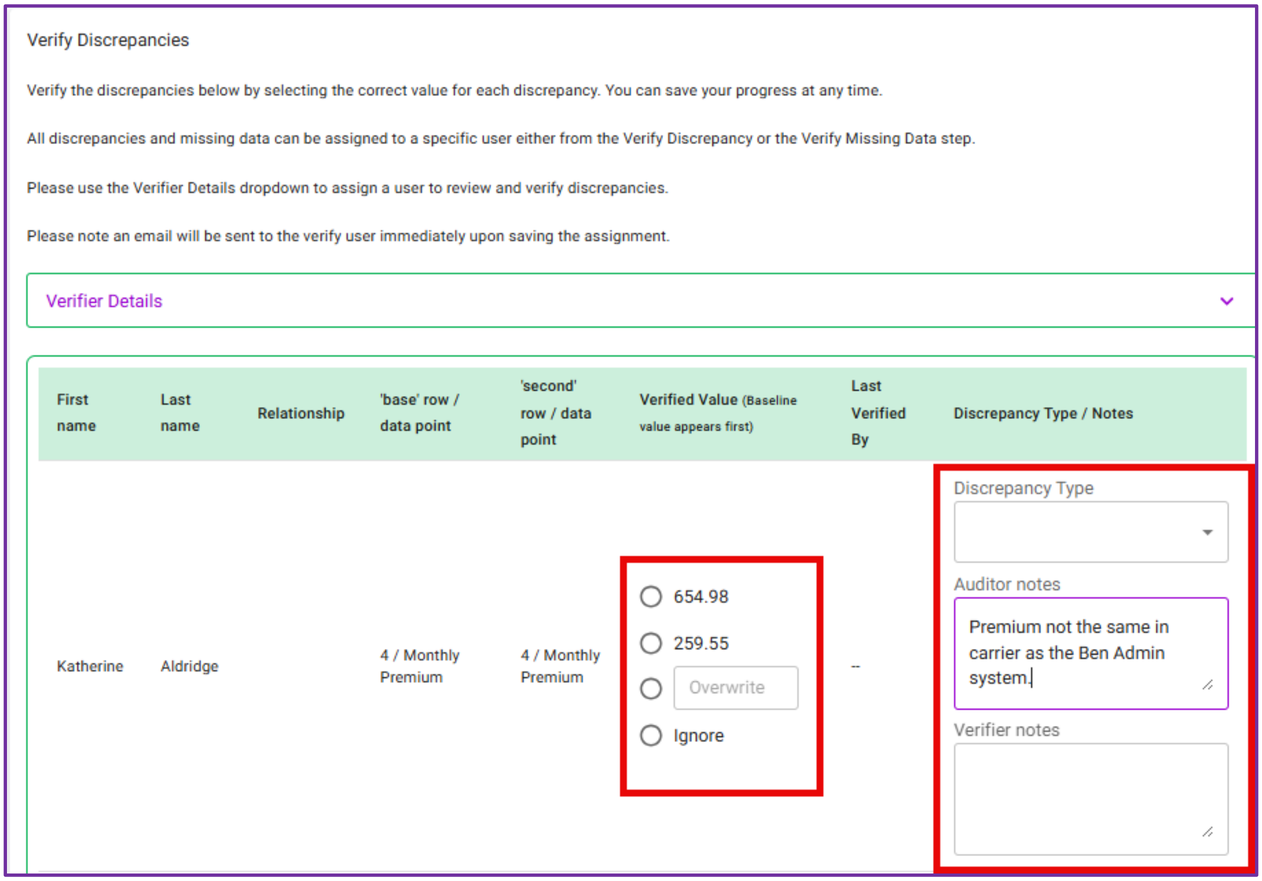
Please note that the **Streamline Support Team** is always available, regardless of audit results. If you need assistance at any time, you can contact us at **support@dms-datavalidate.com**.

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 comparision, 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.

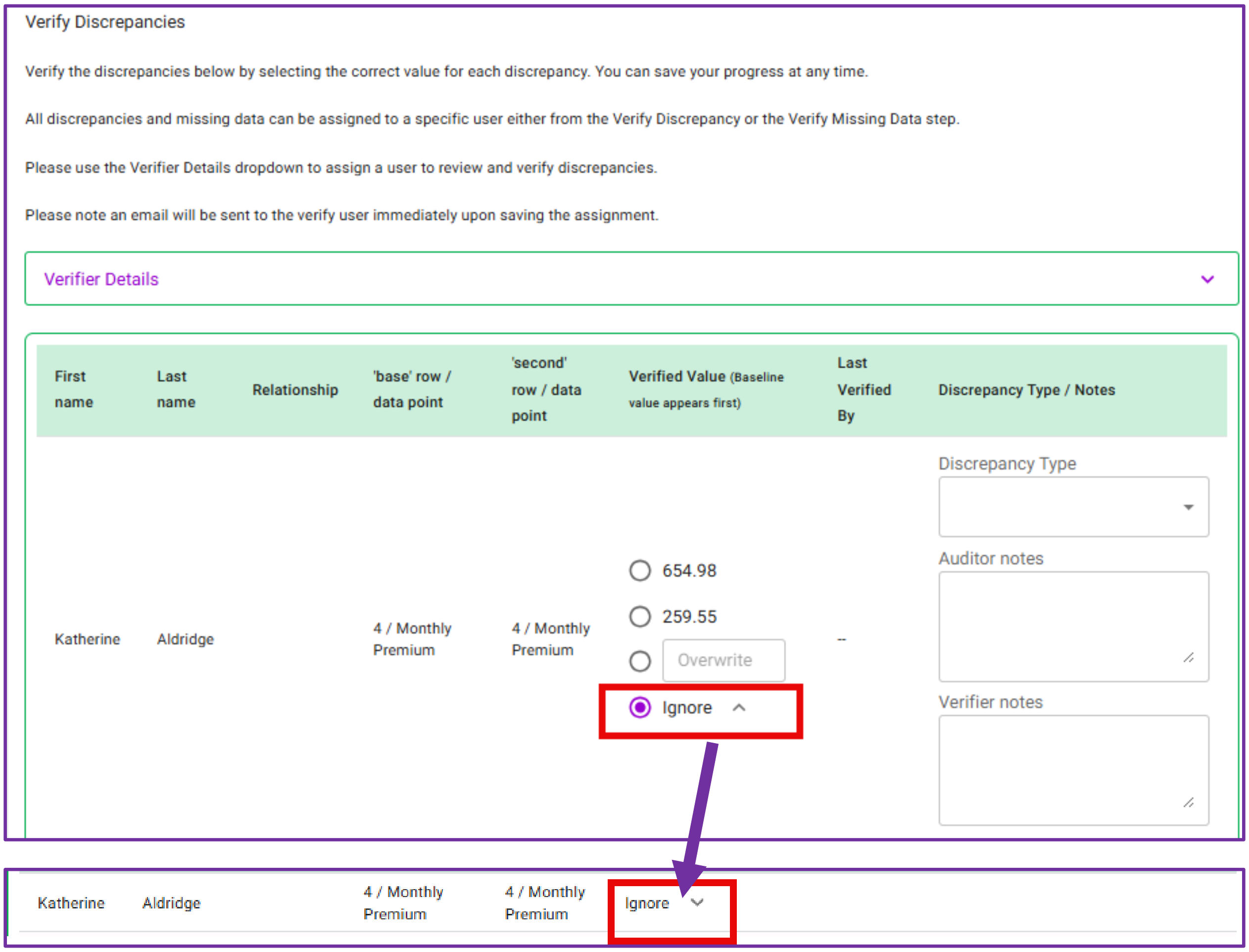


Verify Discrepancies

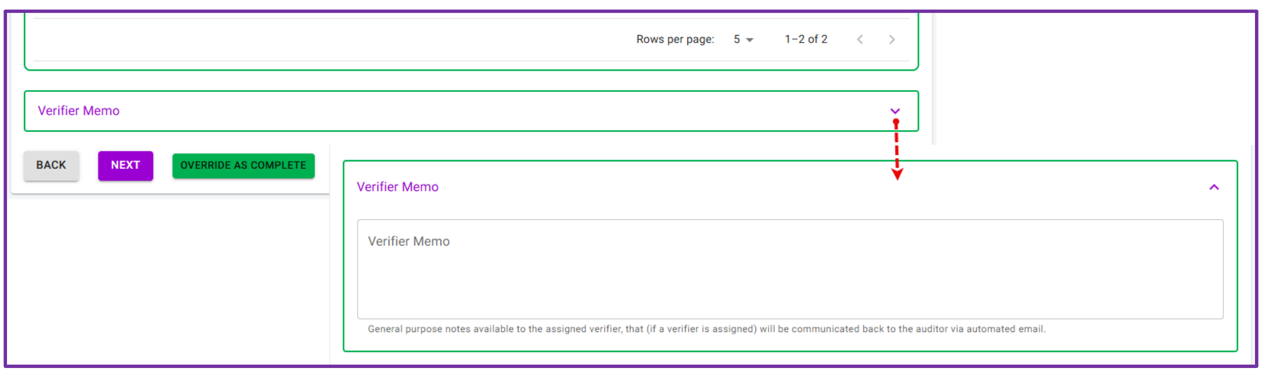
Verify Discrepancy Data entries are identified by the system when the unique identifier from one file is matched to an entry in the opposing file and one or more of the remaining data points do not match. Verify the data discrepancies by selecting the existing value, creating new, or ignoring. A discrepancy 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.



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 (^)



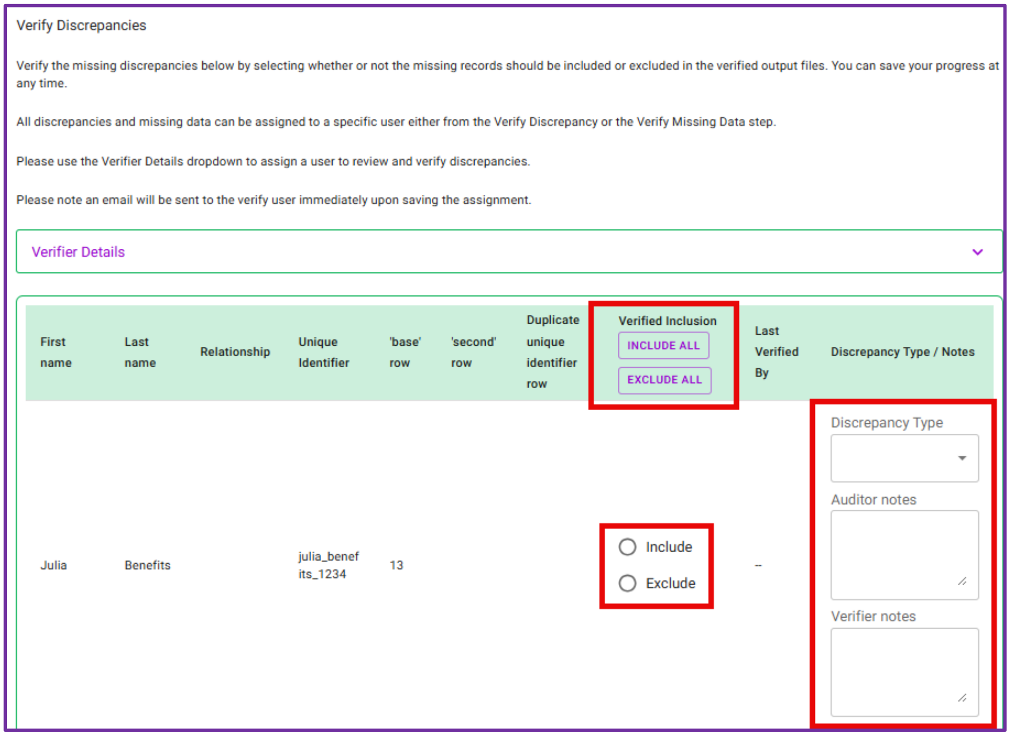
Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.



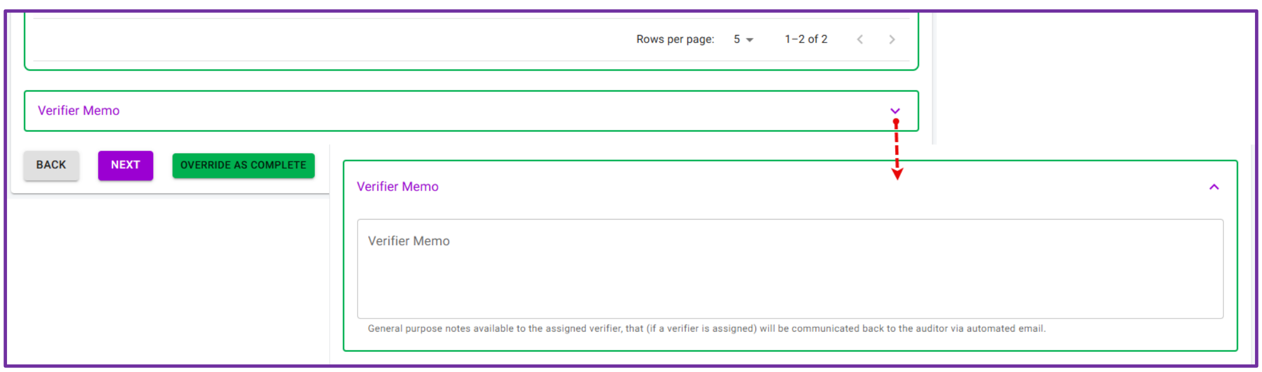
Verify Missing

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.

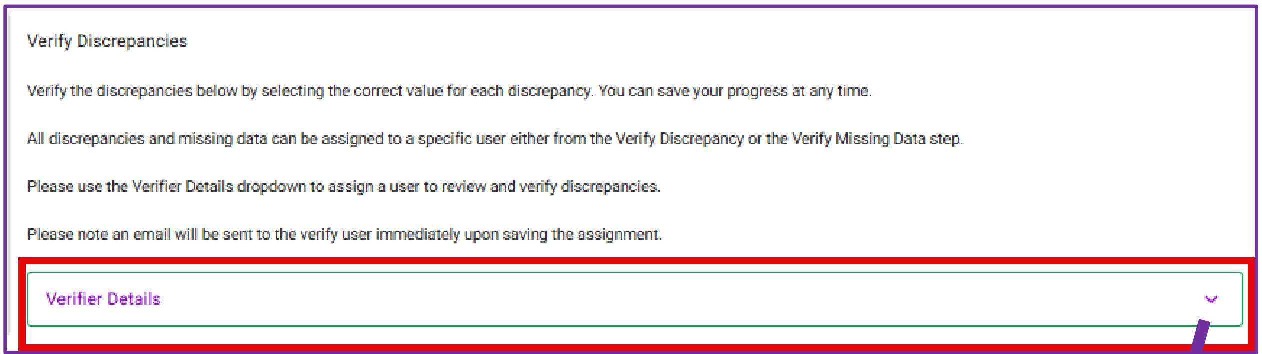


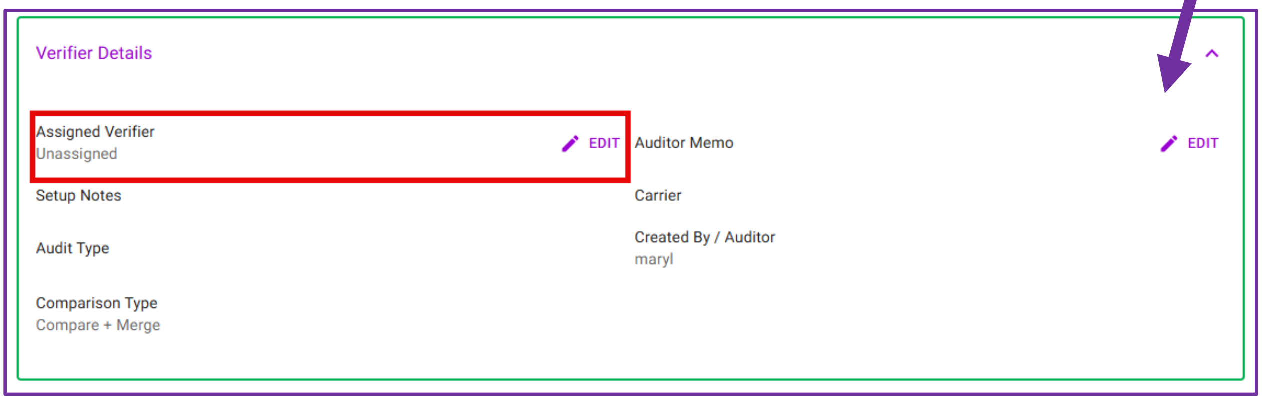
Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.



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.





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}.

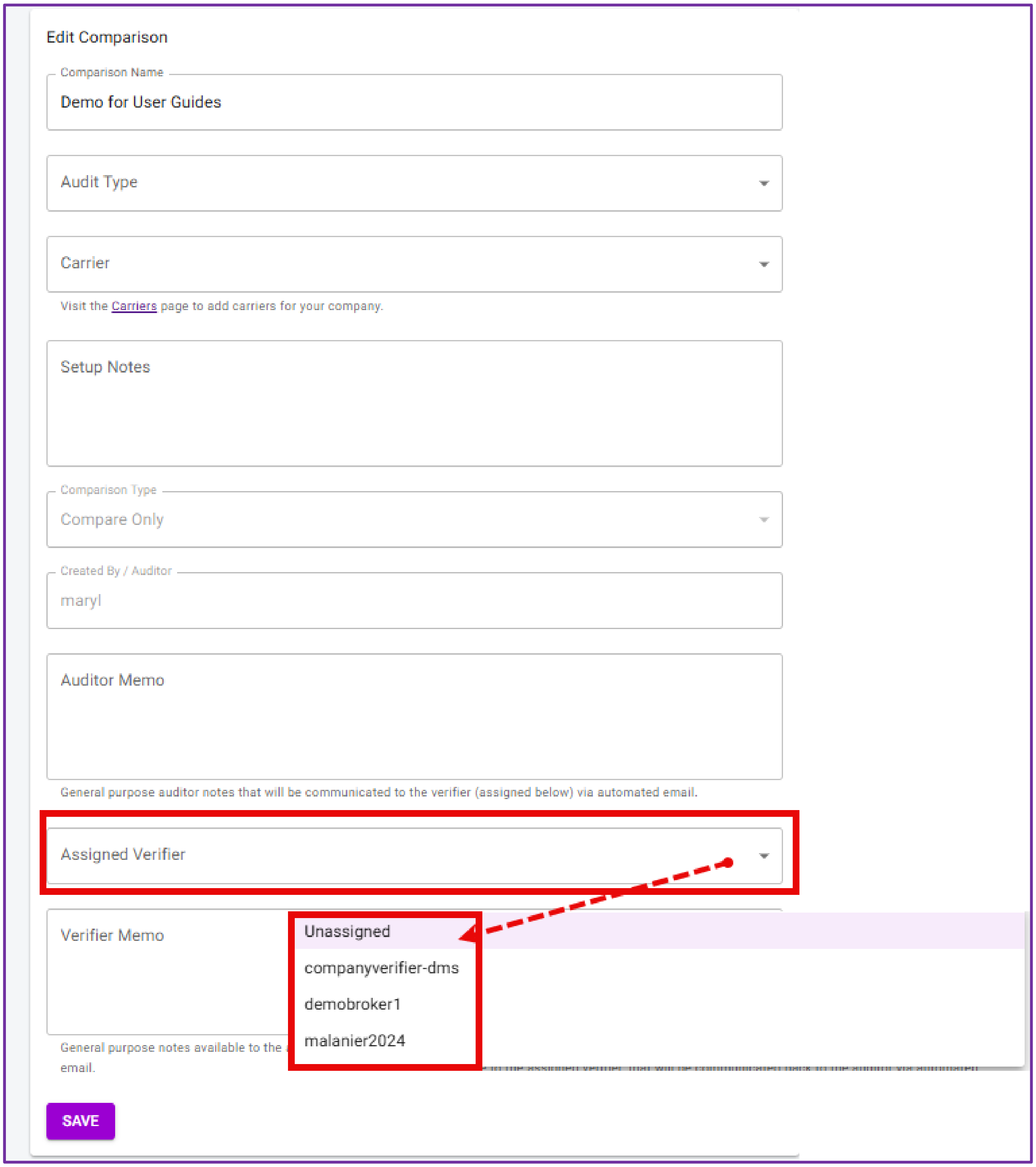
Please click here below to log in and complete the verification process for any discrepancies.

{Auditor Memo}

Thank you,

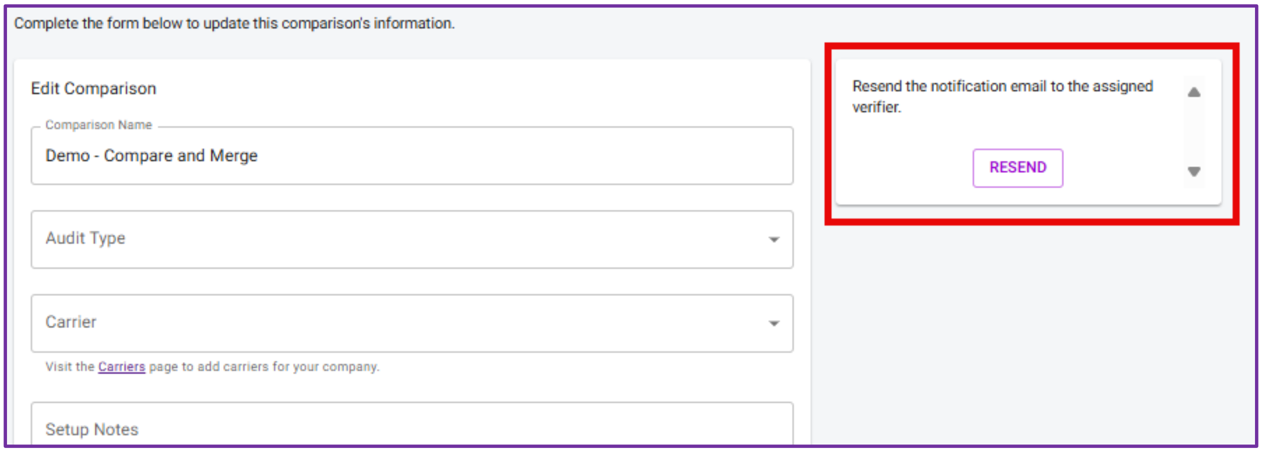
On behalf of {Auditor First Name and last Name}, {Organization Name if Org Level or Company Name if Company Level User}

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



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 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.

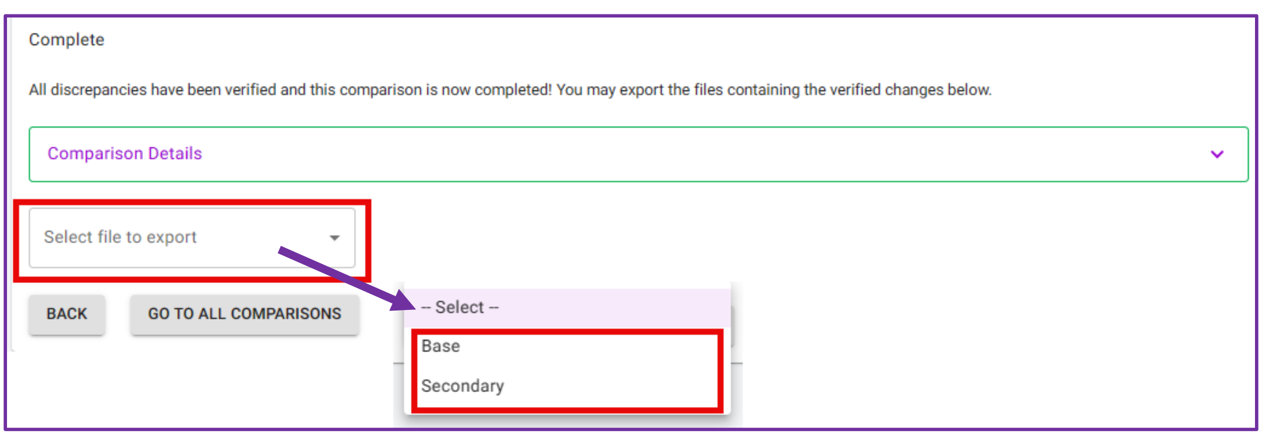
{Verifier Memo}

Thank you,

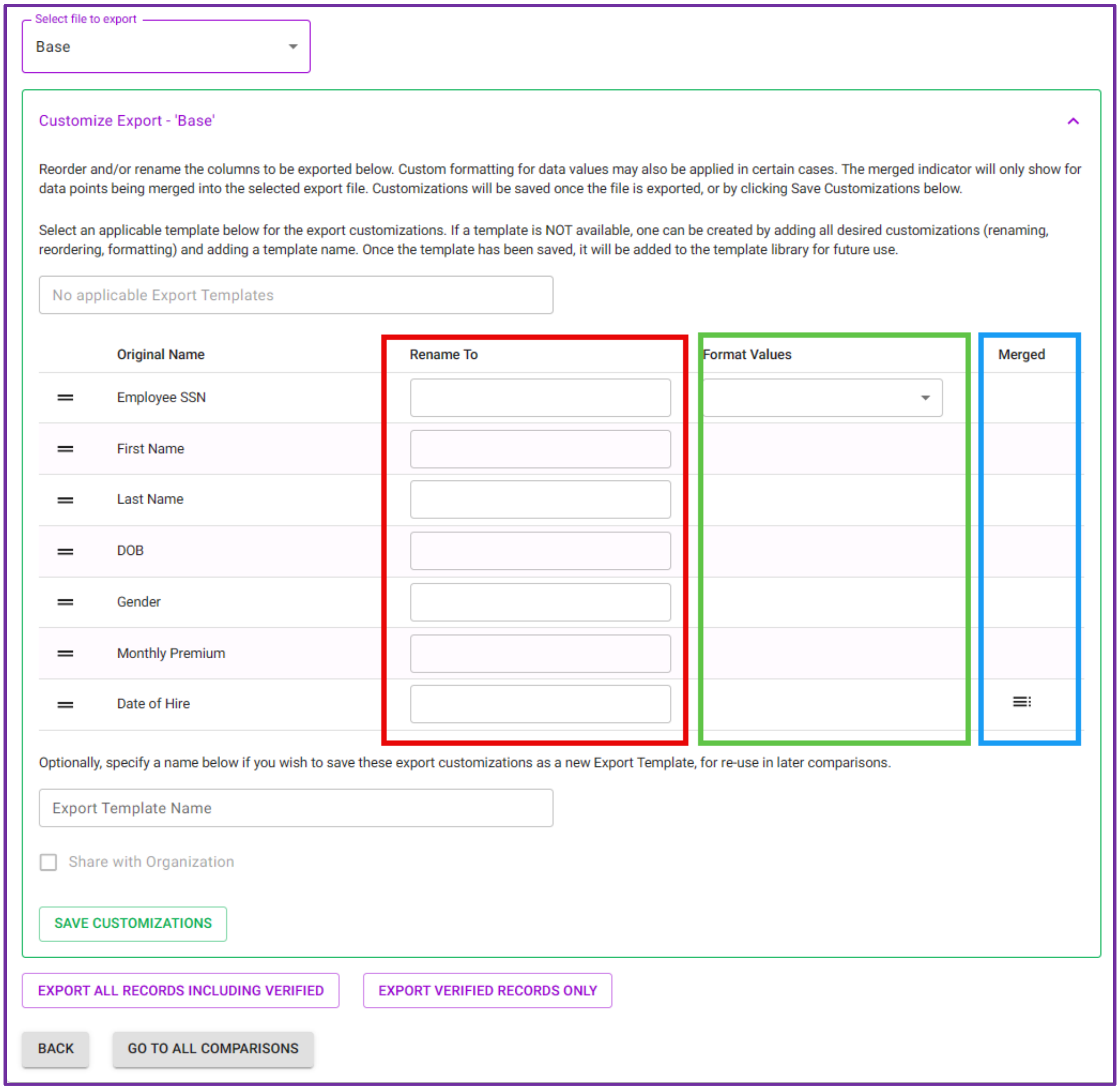
On behalf of {Verifier First Name and Last Name}, {Organization Name if Org Level or Company Name if Company Level User}

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.

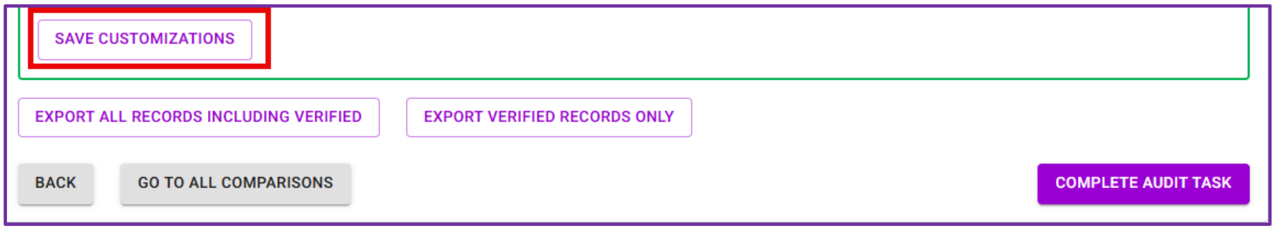


Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the application's key words. For a list of the keywords, please reference the Key Words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



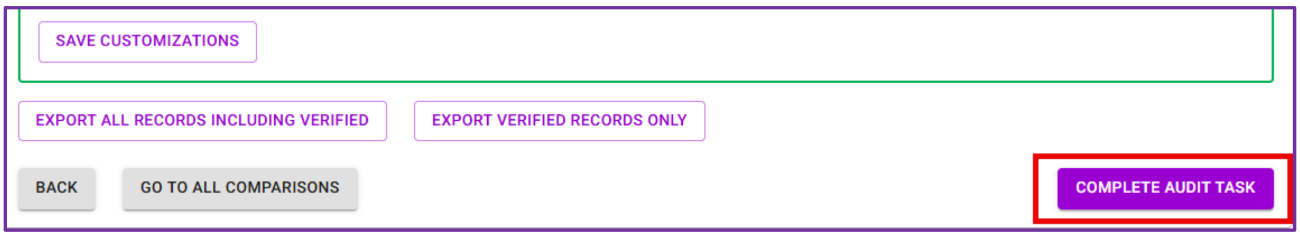
Column names can also be reordered by dragging and dropping data point in desired location.

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



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.

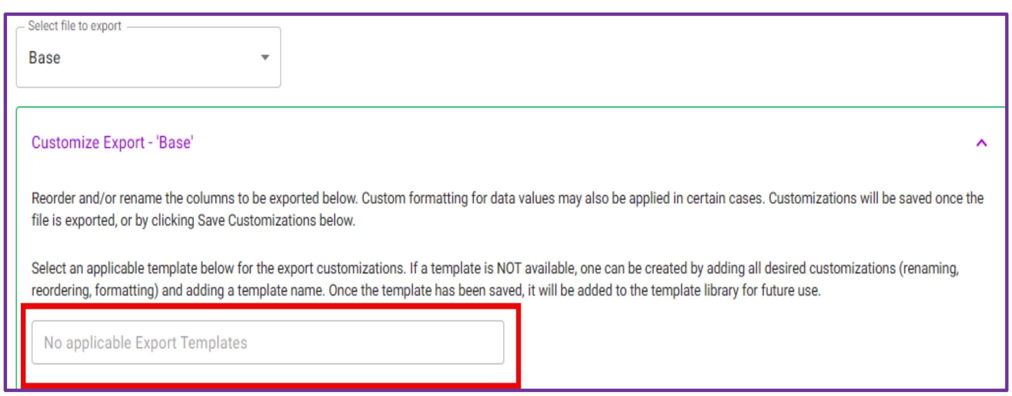


Export Template

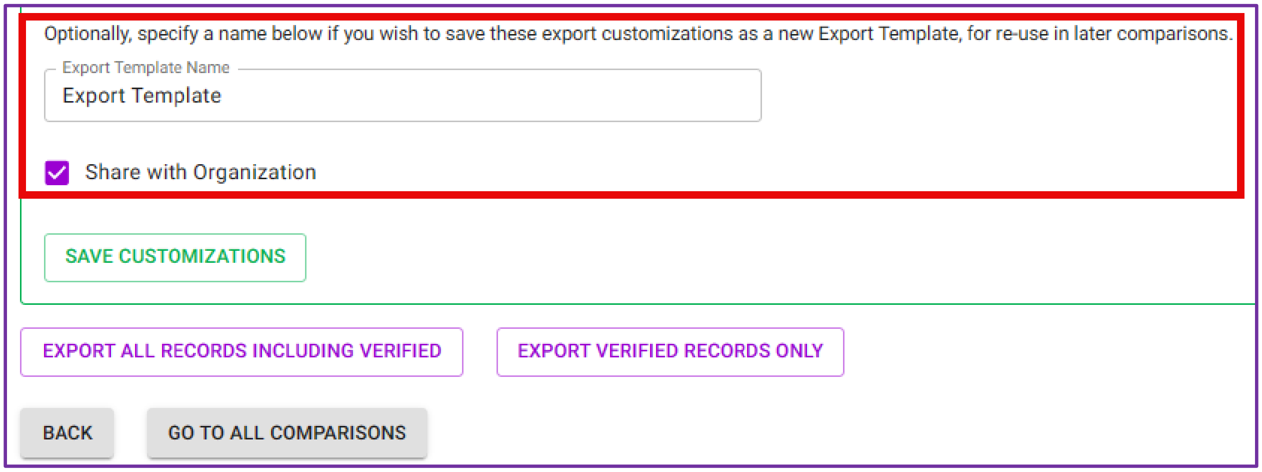
Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming 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:



Saving New Export Template:



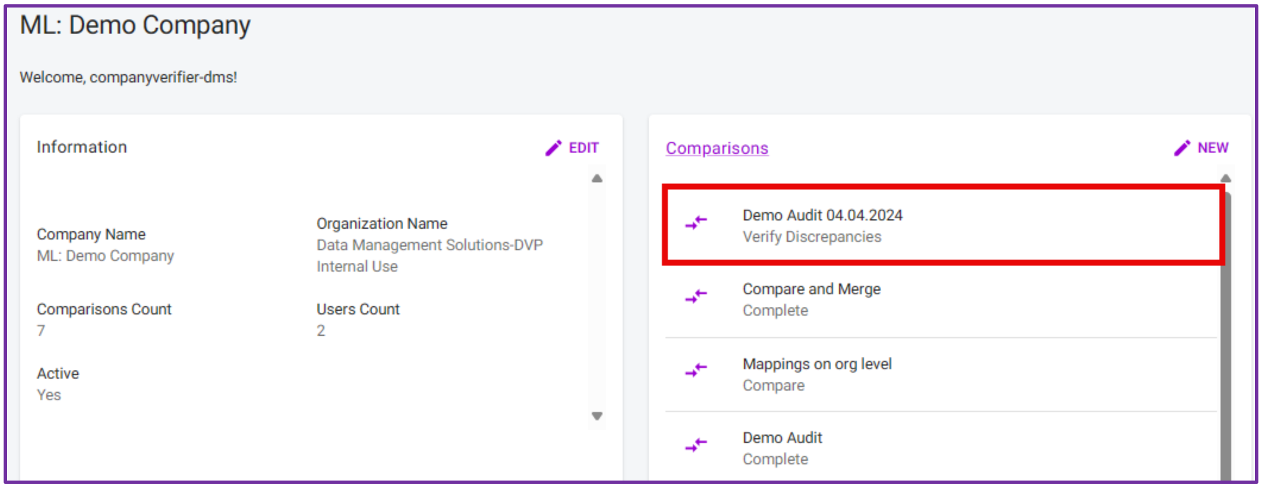
The data comparison and verification processes are complete. To see other comparisons or to begin a new, click GO TO ALL COMPARISONS.

Questions: Contact Support@dms-datavalidate.com

Company Verifier Process

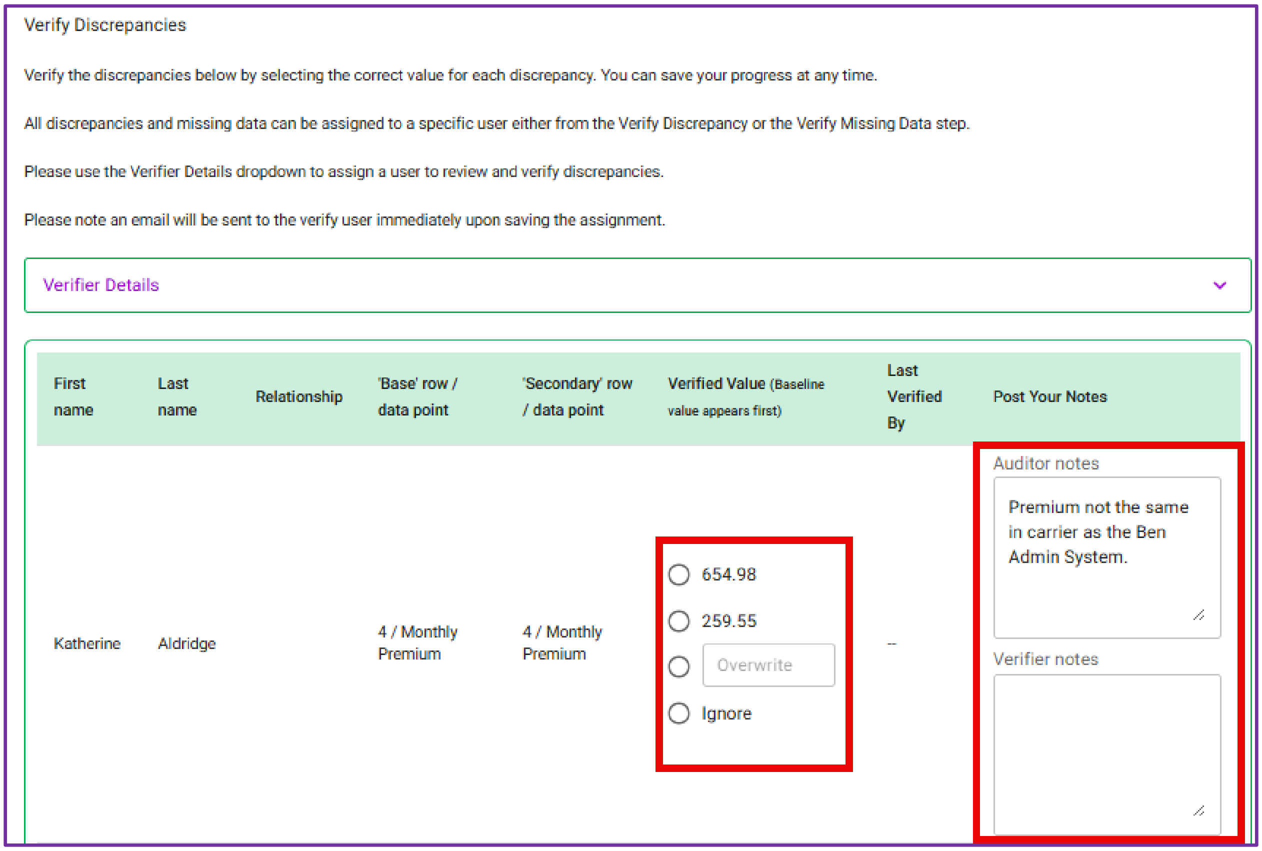
Select company

Select the comparison to verify the audit.

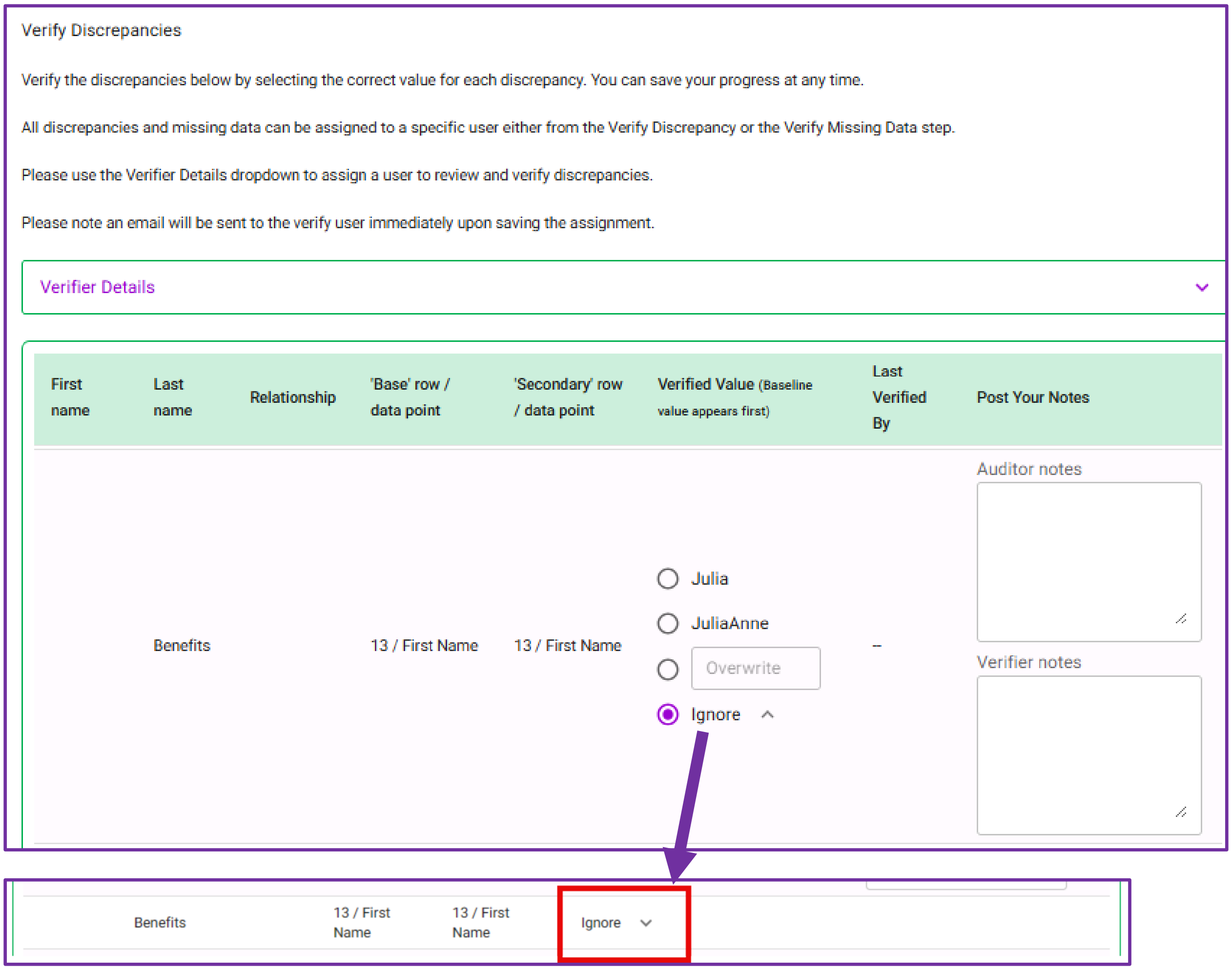


Verify Discrepancies

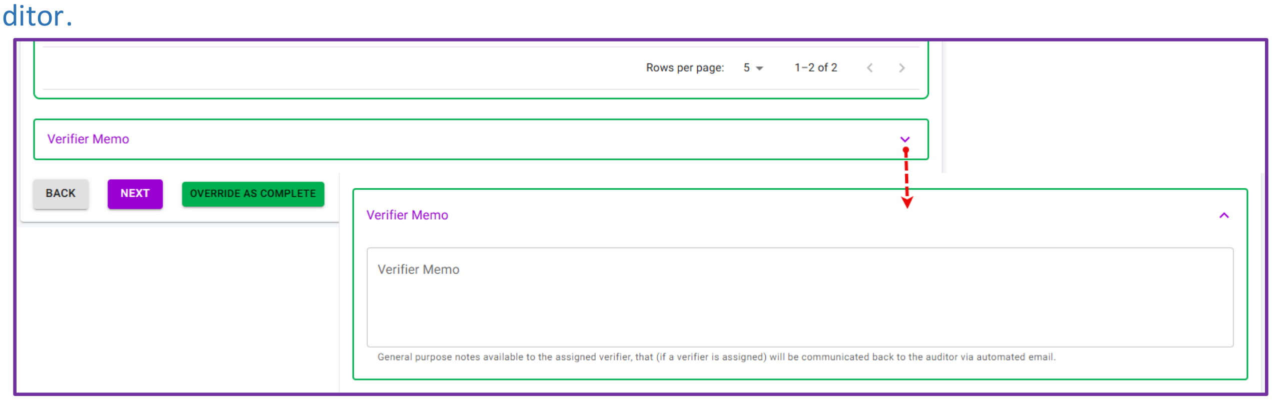
Verify Discrepancy Data entries are identified by the system when the unique identifier from one file is matched to an entry in the opposing file and one or more of the remaining data points do not match. Verify the data discrepancies by selecting the existing value, creating new, or ignoring. Once ALL 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.



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 (^)

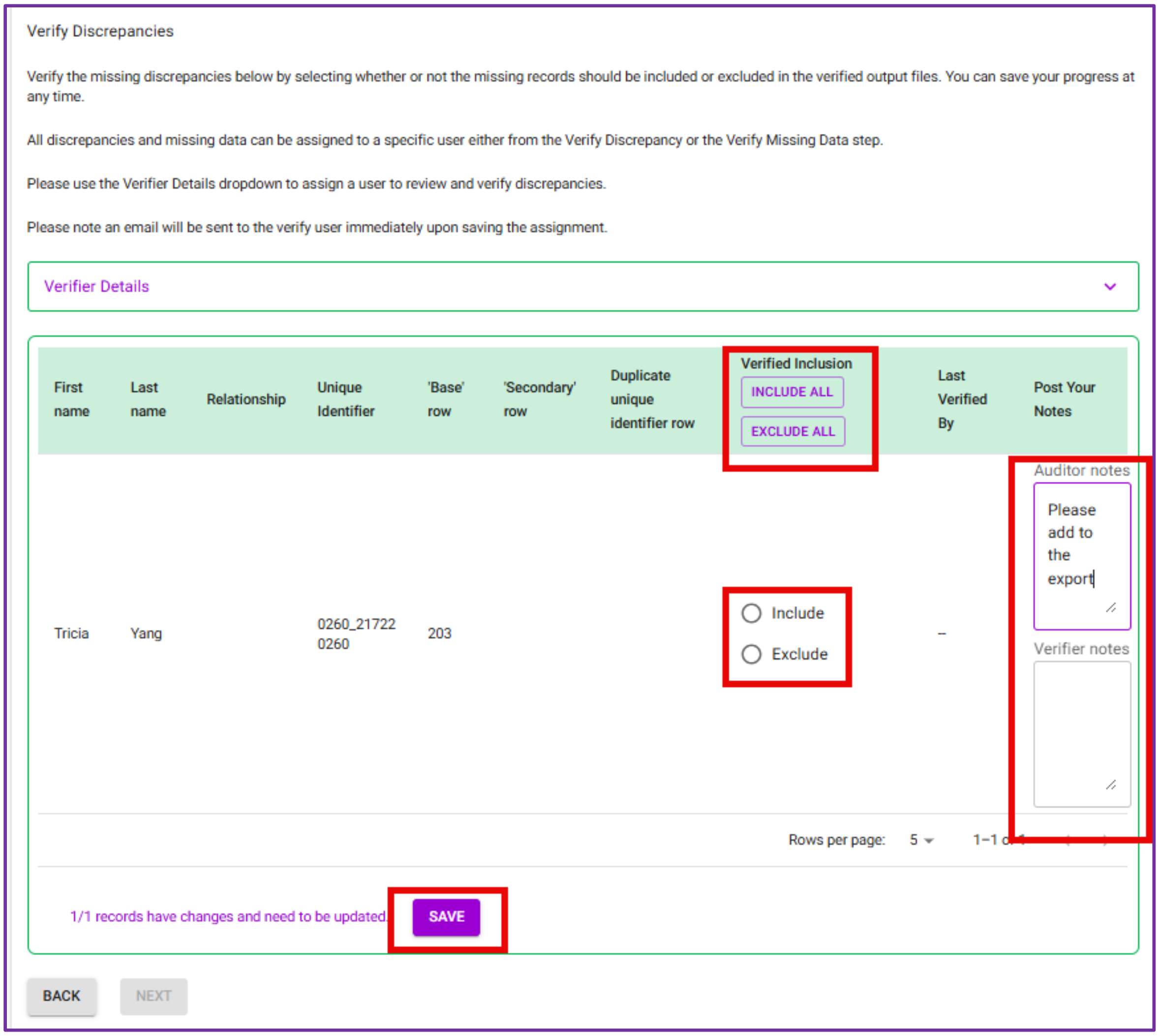


Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.

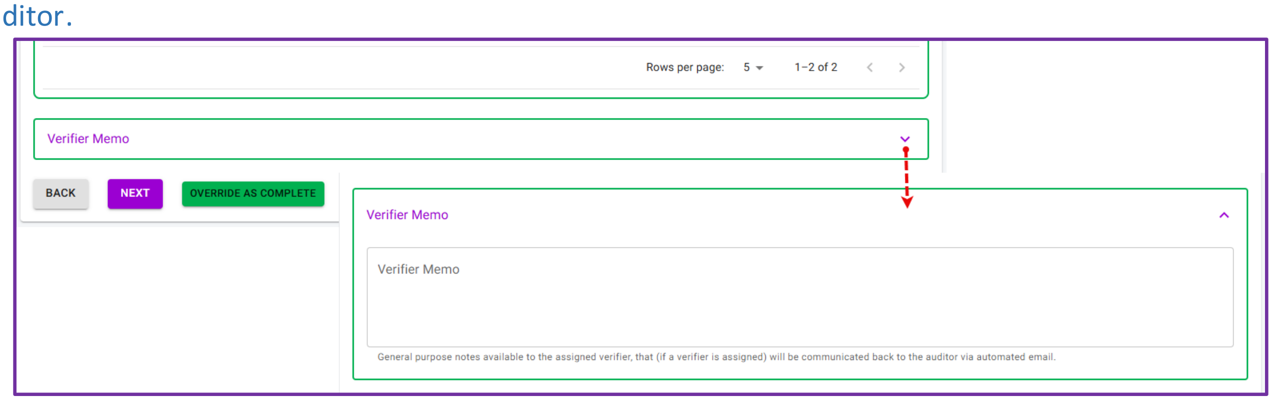


Verify Missing

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 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.



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.



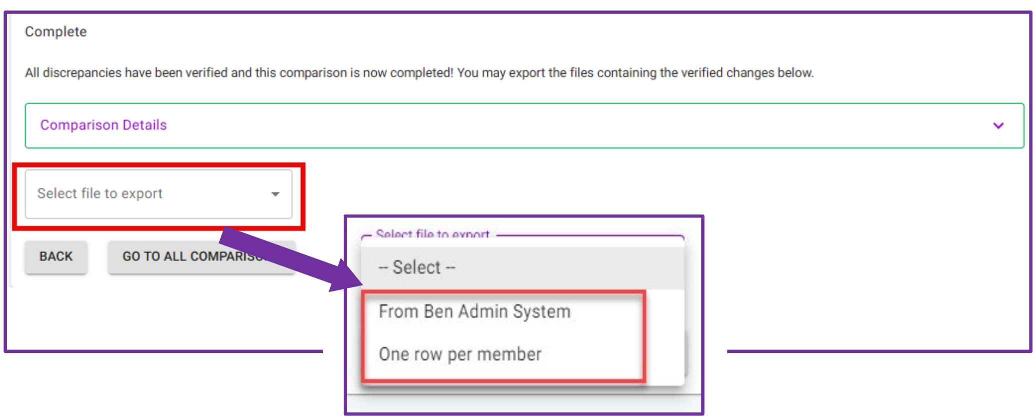
Complete the Compare

Data verification is complete.

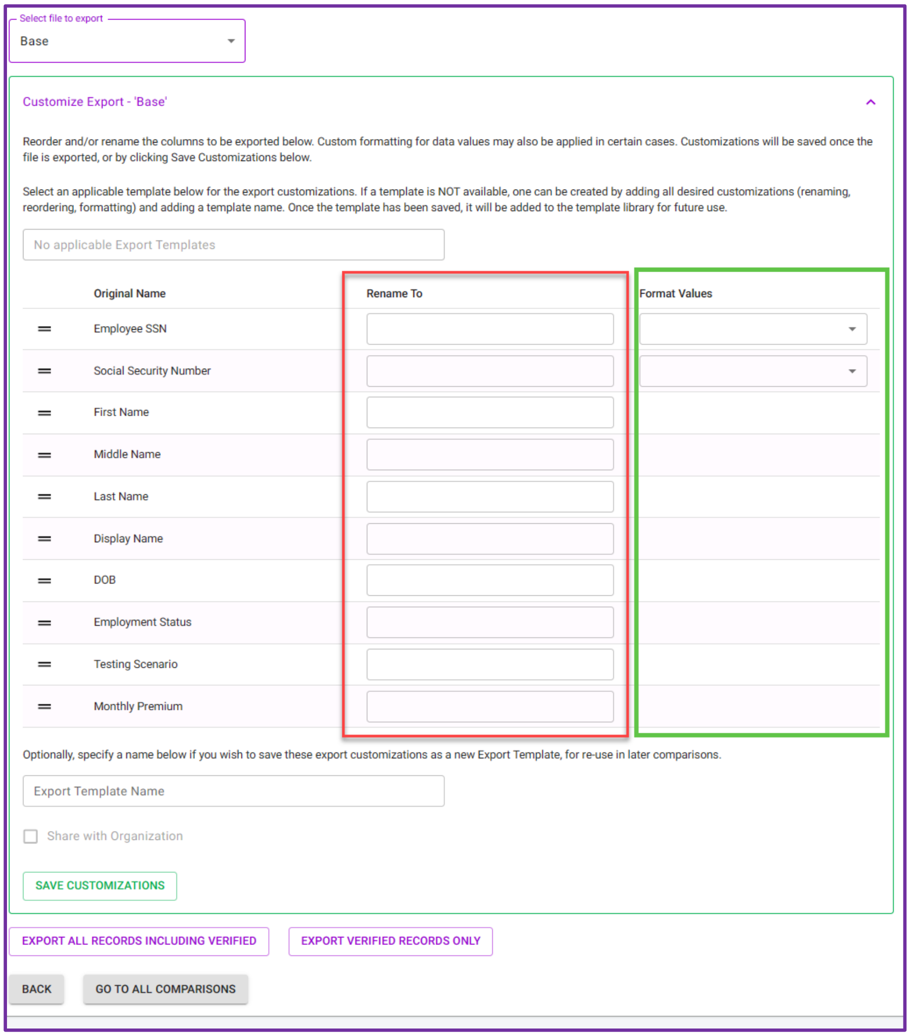
If the audit was assigned to a specific user within the Platform, the auditor will receive a notification email that the audit is complete.

> 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.

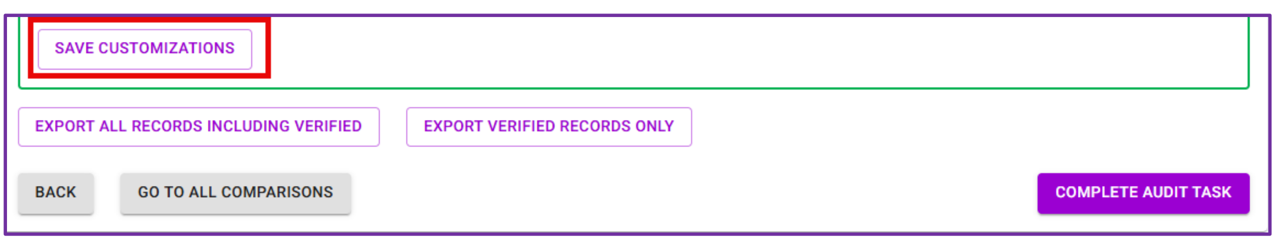


Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the Platforms key words. For a list of the keywords, please reference the Keys Words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



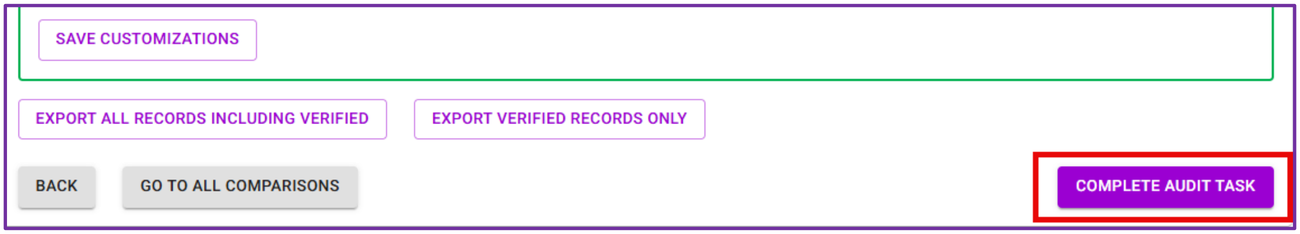
Column names can also be reordered by dragging and dropping data point in desired location.

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



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.

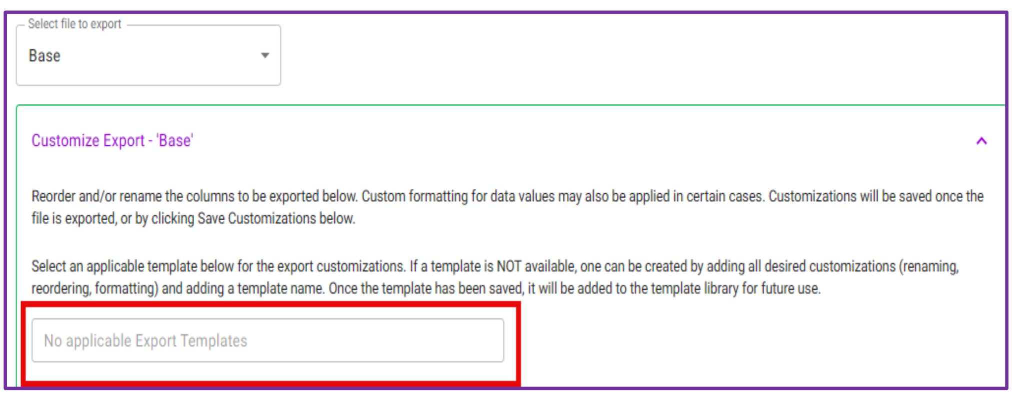


Export Template

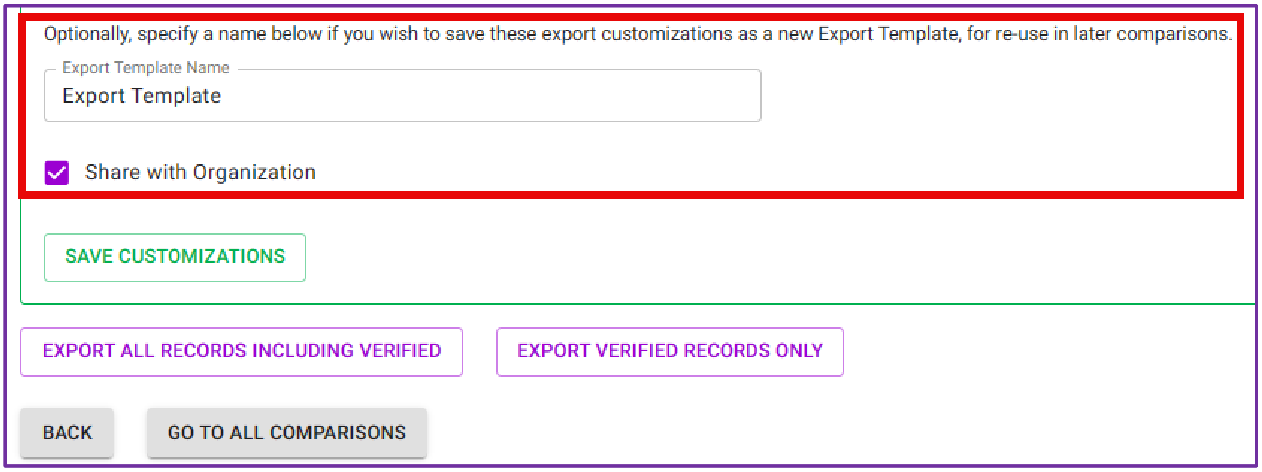
Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming 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:



Saving New Export Template:



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?

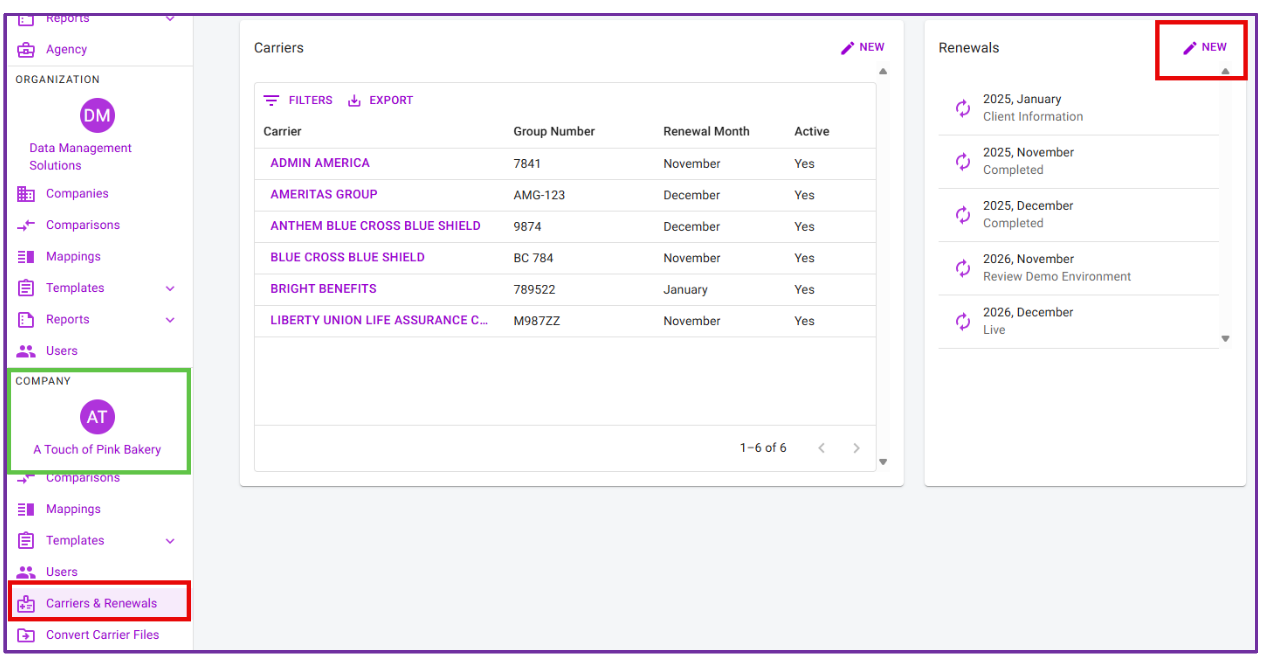
GA (General Agent) → Starts the renewal, reviews/approves, enters testing details, closes task.

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.



- 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

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.

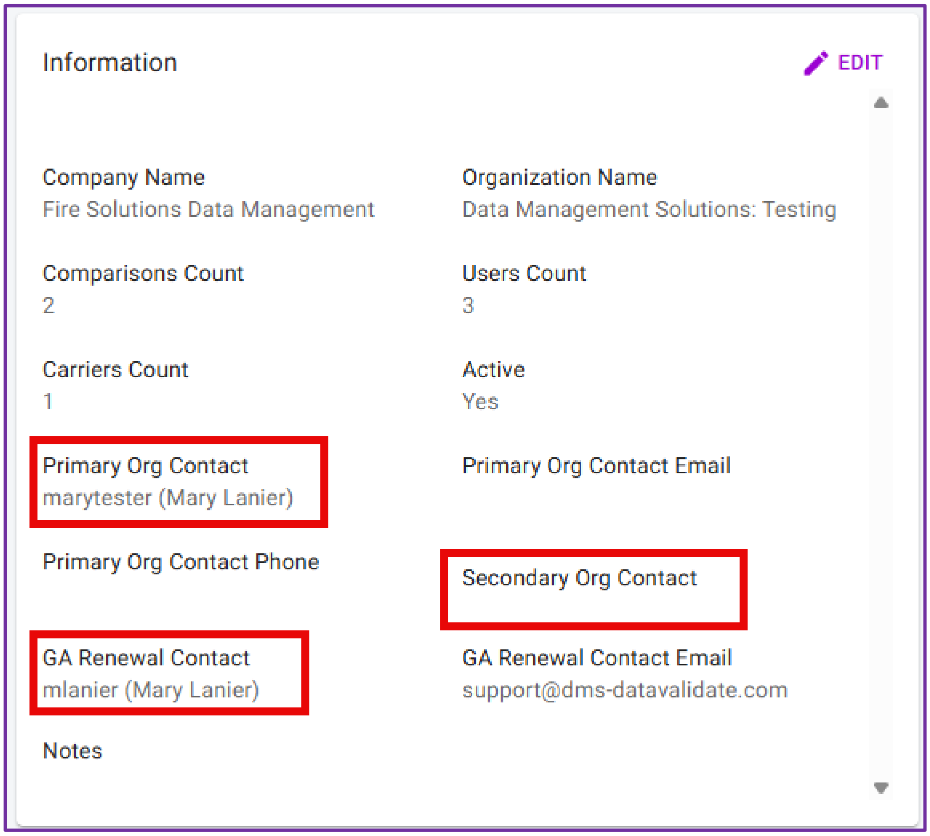
We look forward to partnering with you to ensure a smooth and timely renewal for Full Stack Pancake Diner. If this request should be directed to another contact, please provide their information in the comments. We'll be happy to reassign the task accordingly.

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

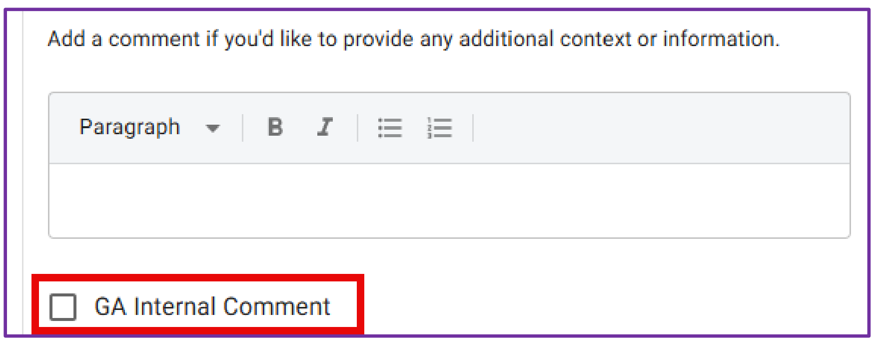
Note: Organization contacts and GA Renewal Contact can be found on the Company Detail page.



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.



    - 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

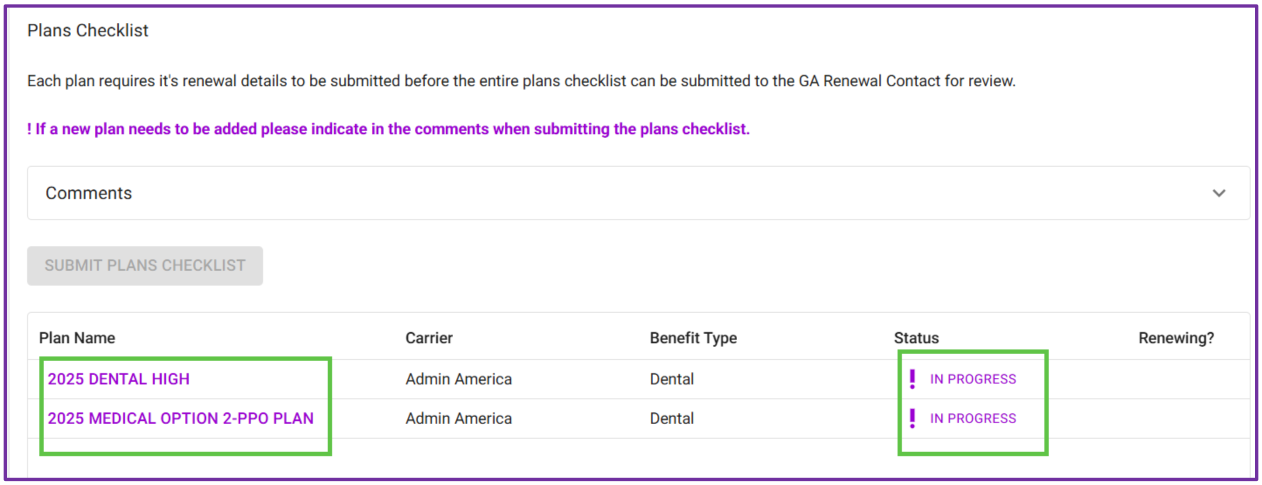
SKIP

SUBMIT CLIENT INFORMATION

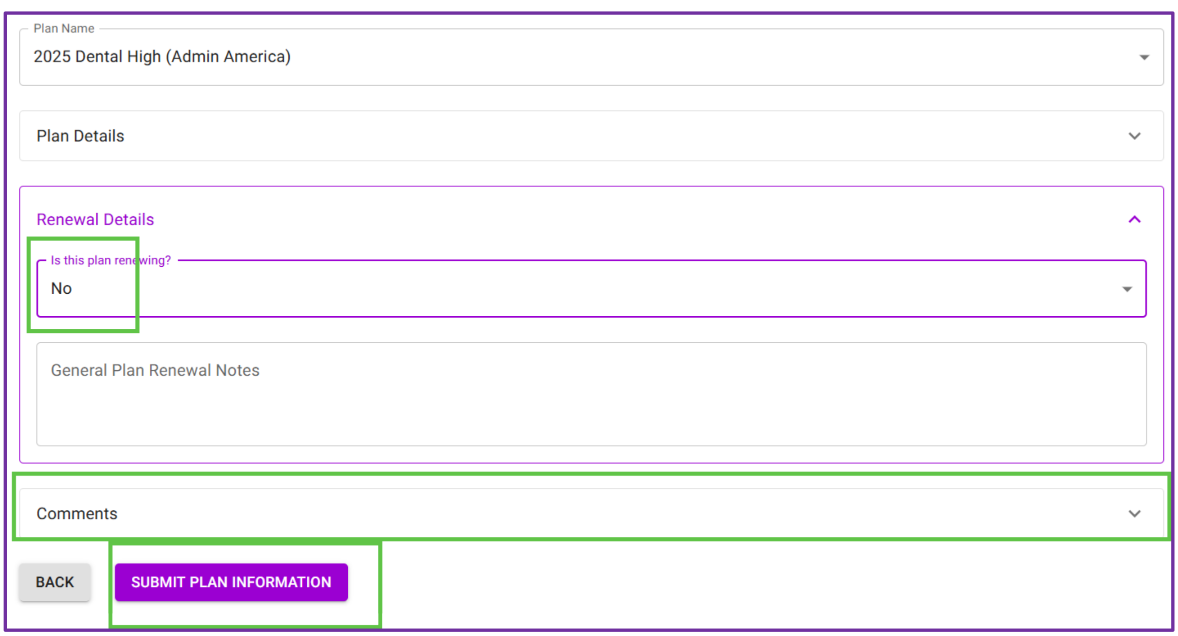
CLOSE RENEWAL

Step 3: Organization Completes Plans Checklist

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

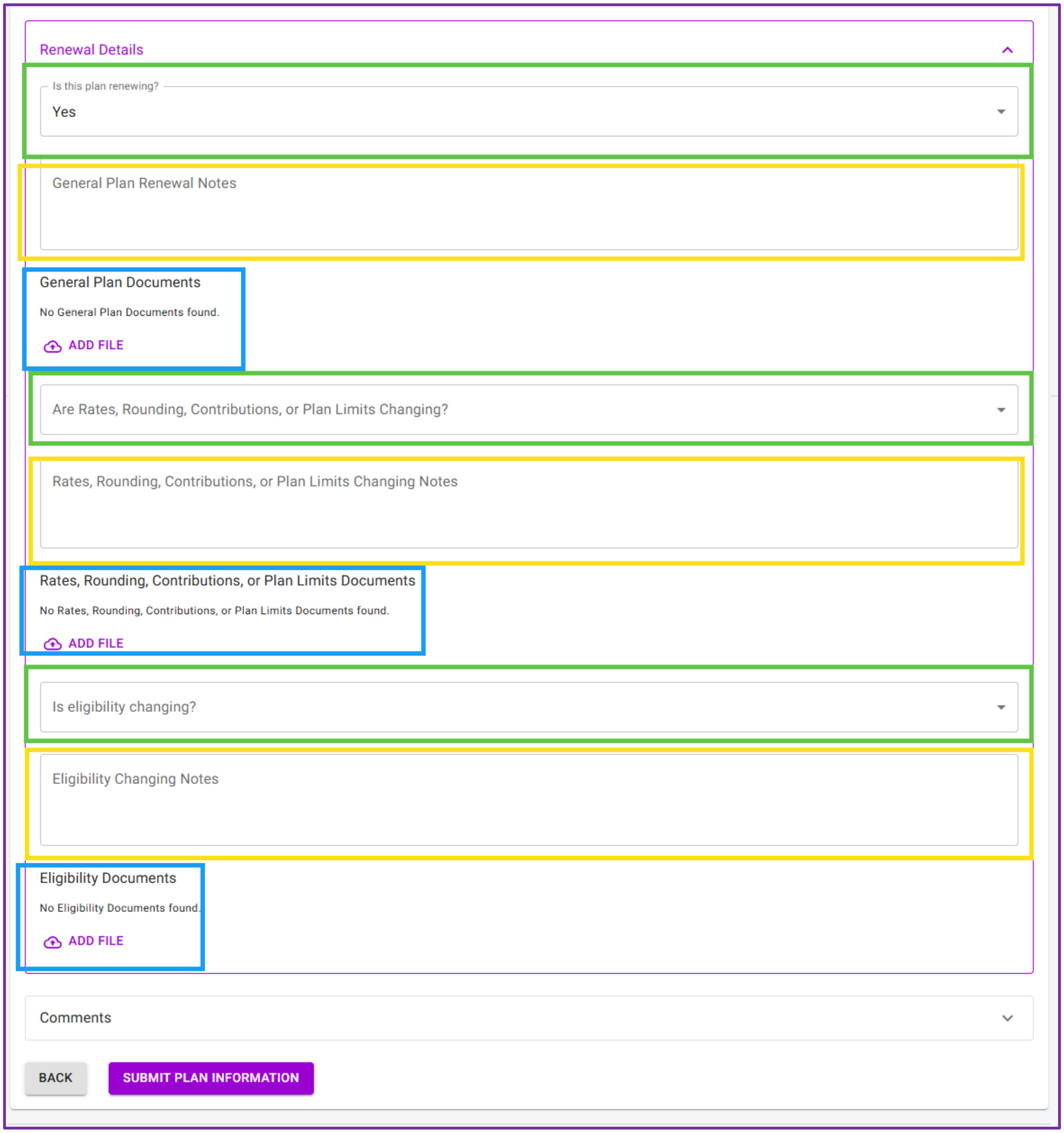


  - If **not renewing** →
    - Select NO and add additional information to the General Plan Renewal Notes and/or Comments to indicate if the carrier is being replaced by another or any other pertinent information for the GA contact.
    - Click **Submit Plan Information** (status changes to Submitted).



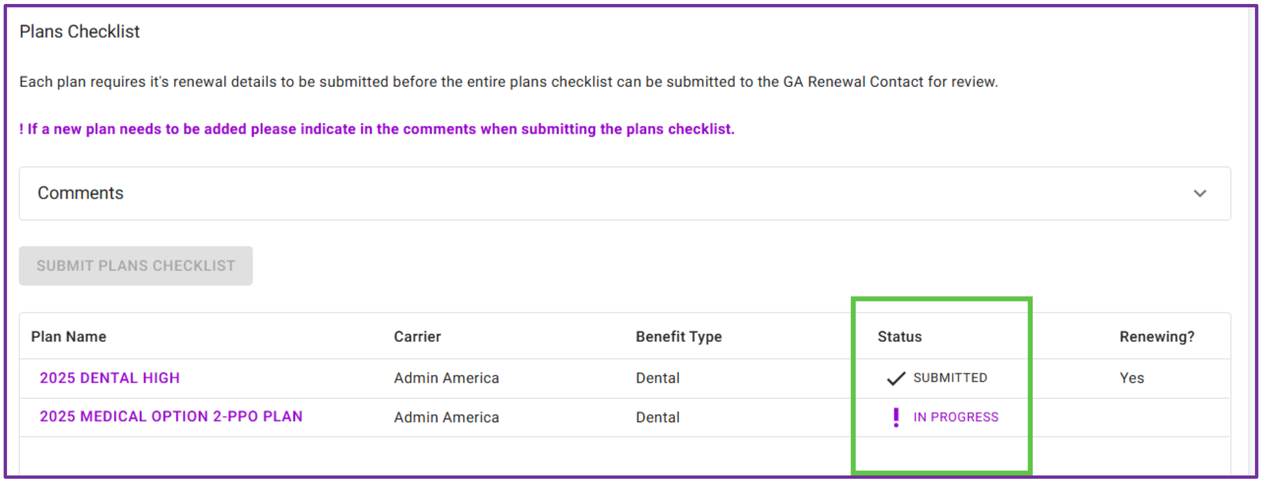
  - If **renewing** →

  - 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

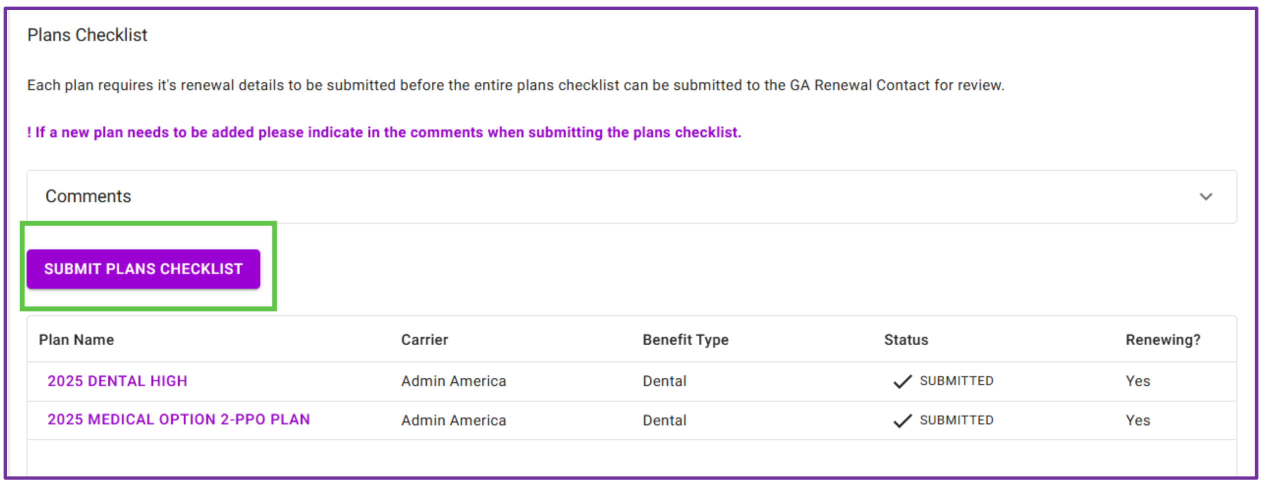


- Click **SUBMIT PLAN INFORMATION** once all selections have been made for the specific plan.

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



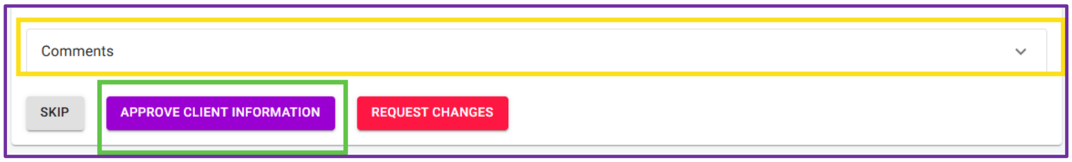
- Once all plans are submitted, click **Submit Plans Checklist** → GA is notified by an email.



Step 4: GA Reviews & Collaborates

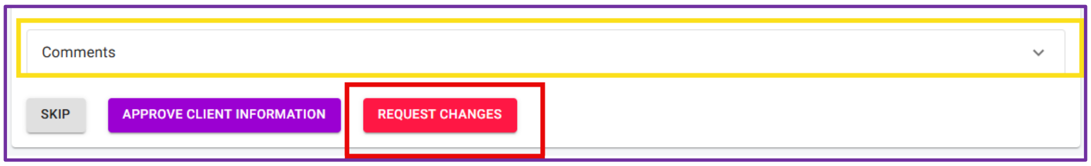
- GA will receive an email when the Organization contact completes the Client Information and/or Plans Checklist.
    - **GA Review Client Information – Approval**

      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**.



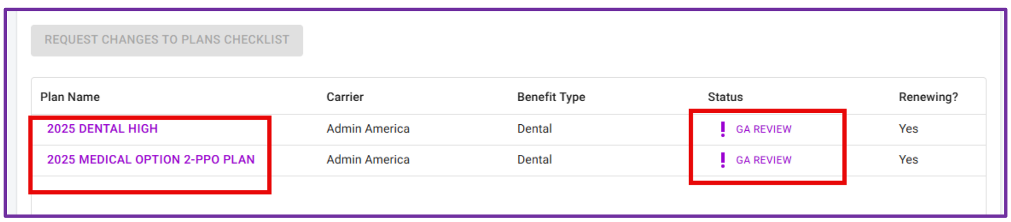
- ### GA Review Client Information – Request Changes

  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

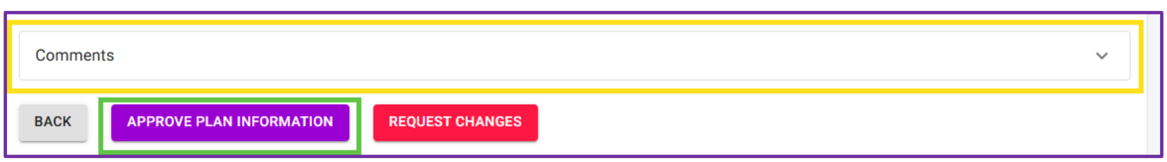


- ### GA Review Plans Checklist – Approval

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

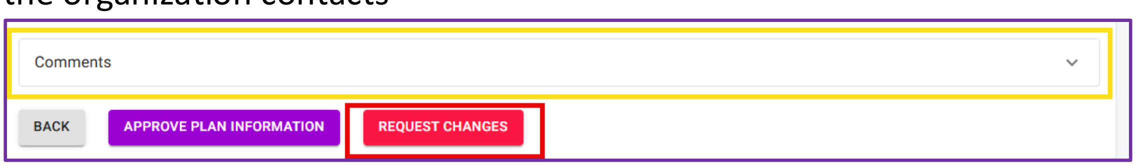


  If all required information and documents have been provided by the organization contacts and no further details are needed, the GA should add any desired comments and then click **APPROVE PLAN INFORMATION.**



- ### 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

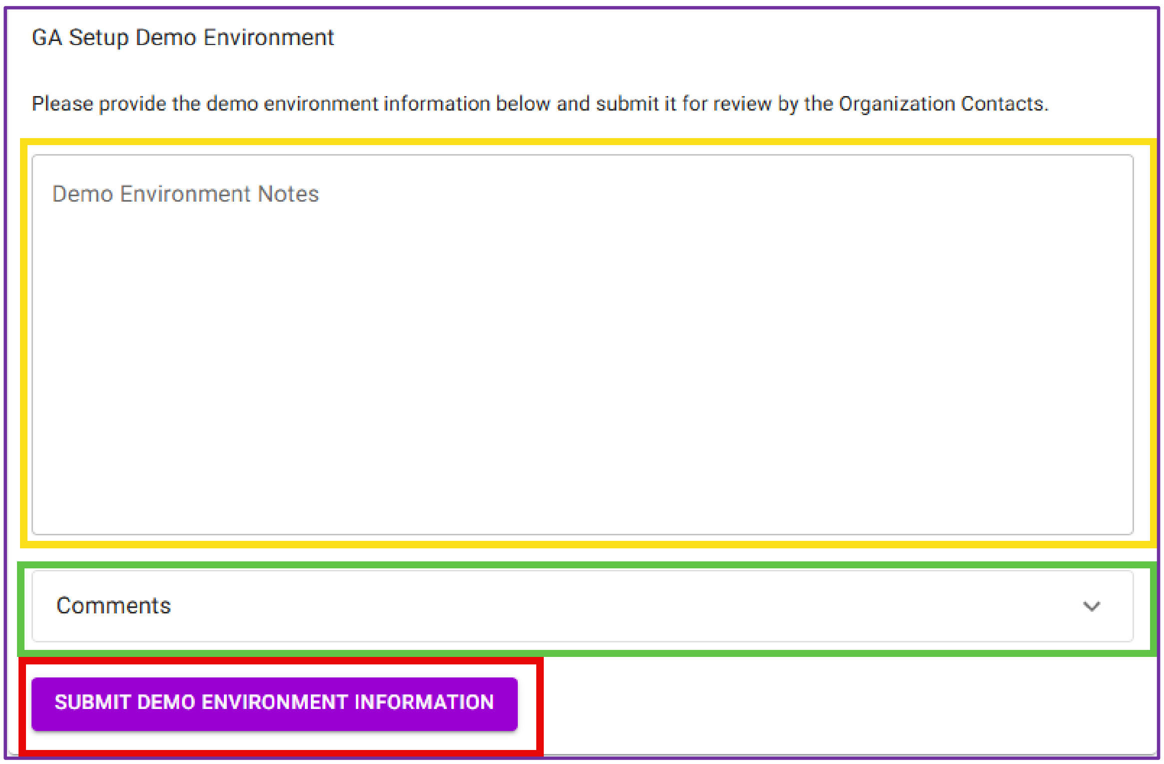


- When all plans have been approved, click **APPROVE PLANS CHECKLIST**.

- Collaboration continues until both steps are approved.

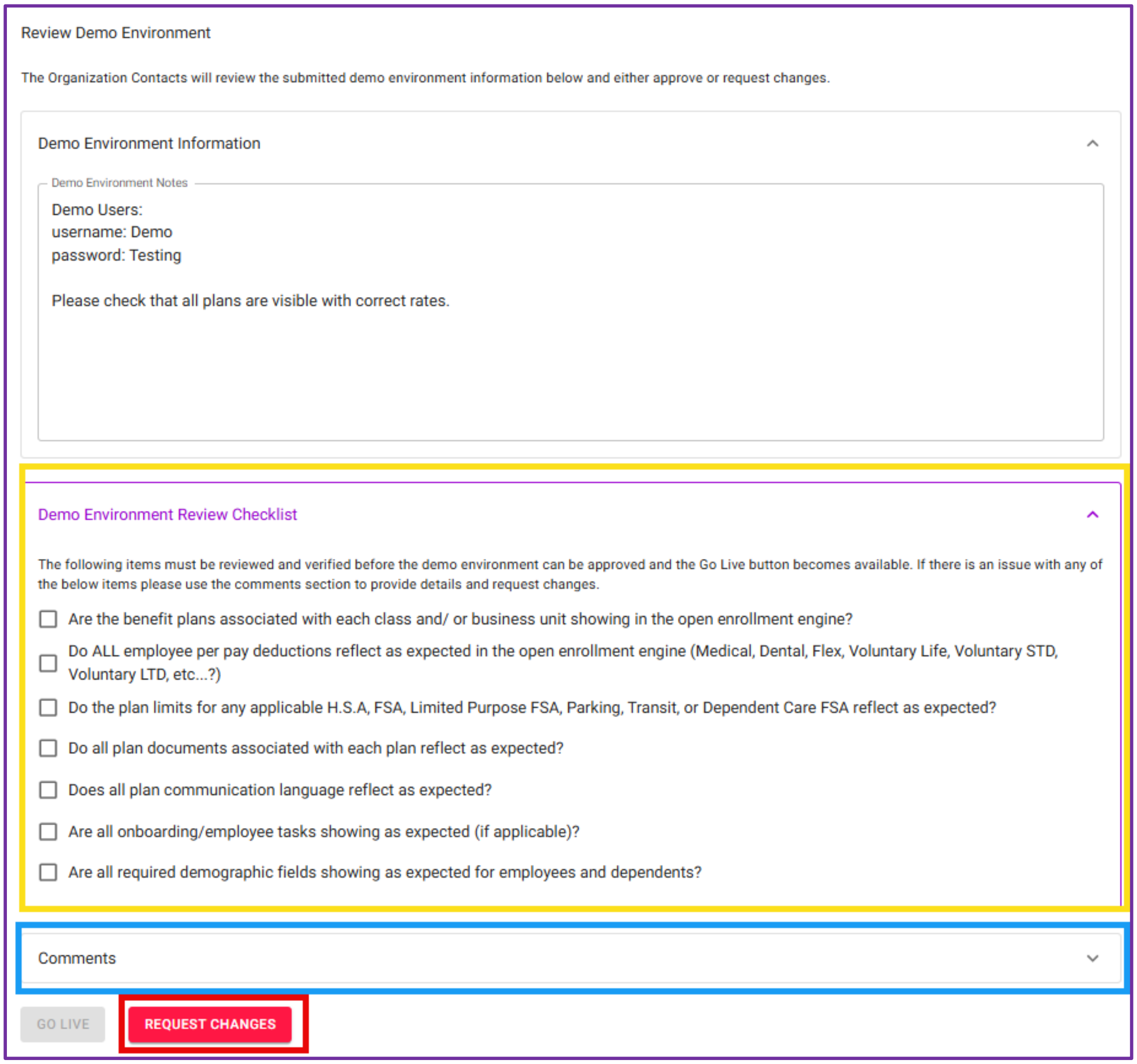
Steps 5 & 6: Testing & Go Live

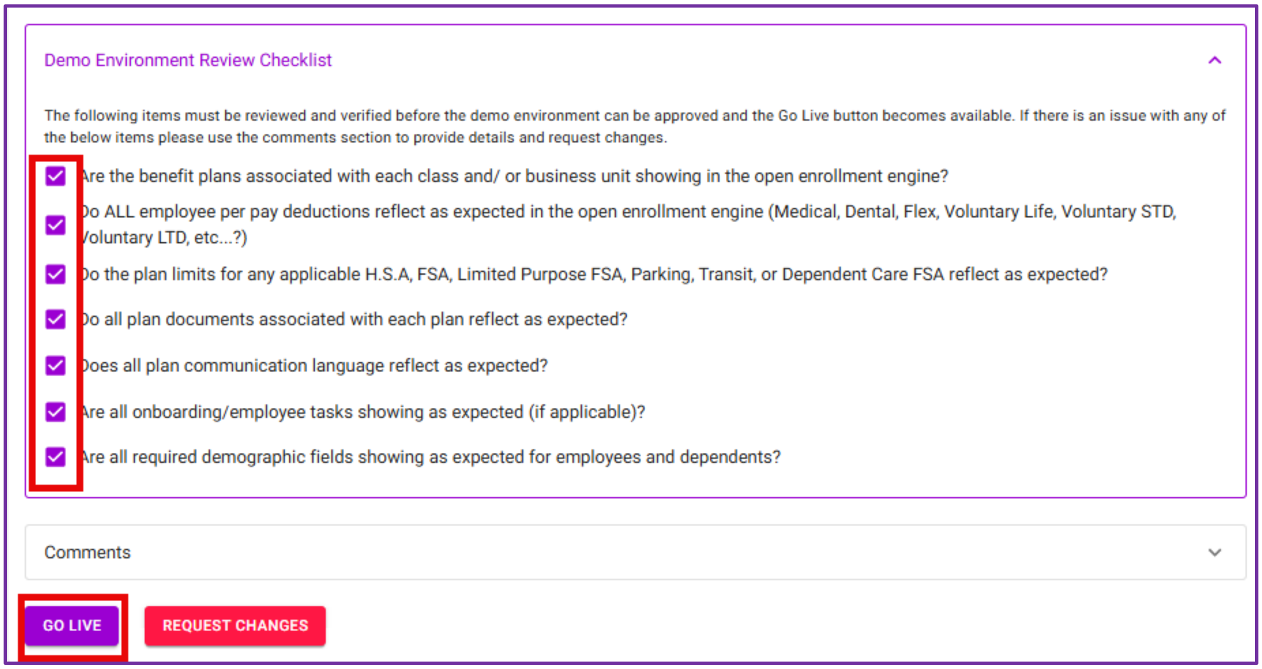
- Once the Client Information and the Plans Checklist have been approved, it is time to set up the Demo Environment in the Benefit Administration System. On Step 5, the GA enters **testing details** such as demo users and instructions in the Demo Environment Notes section as well as any additional comments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



- 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).

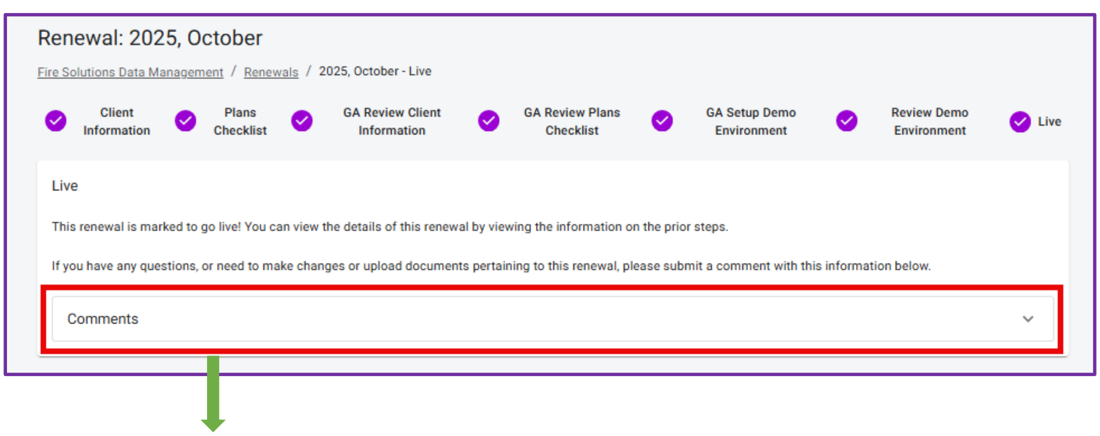


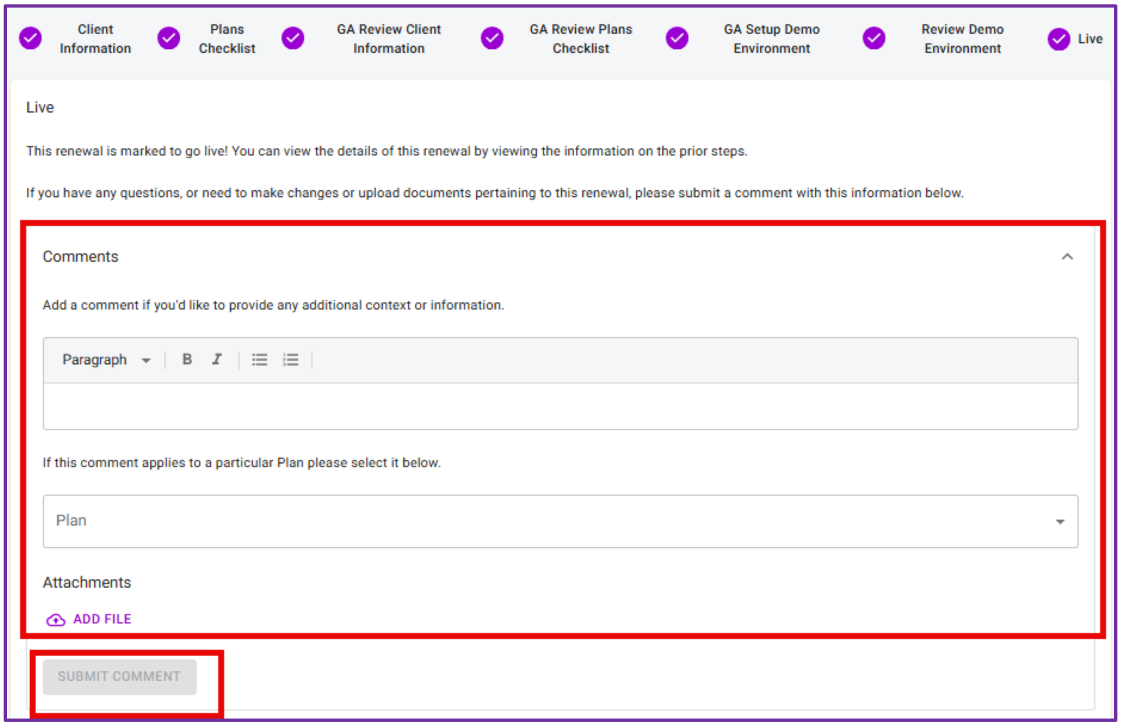


Step 7: Renewal Completion

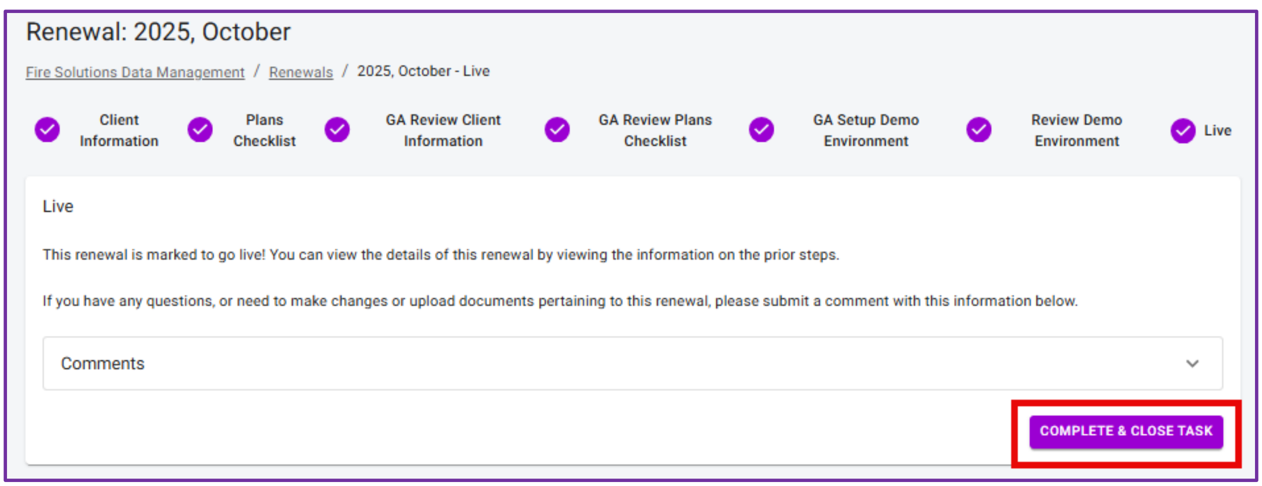
- Once live, the renewal is **locked**—previous steps cannot be reopened.
- Post-Go Live:

  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.





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

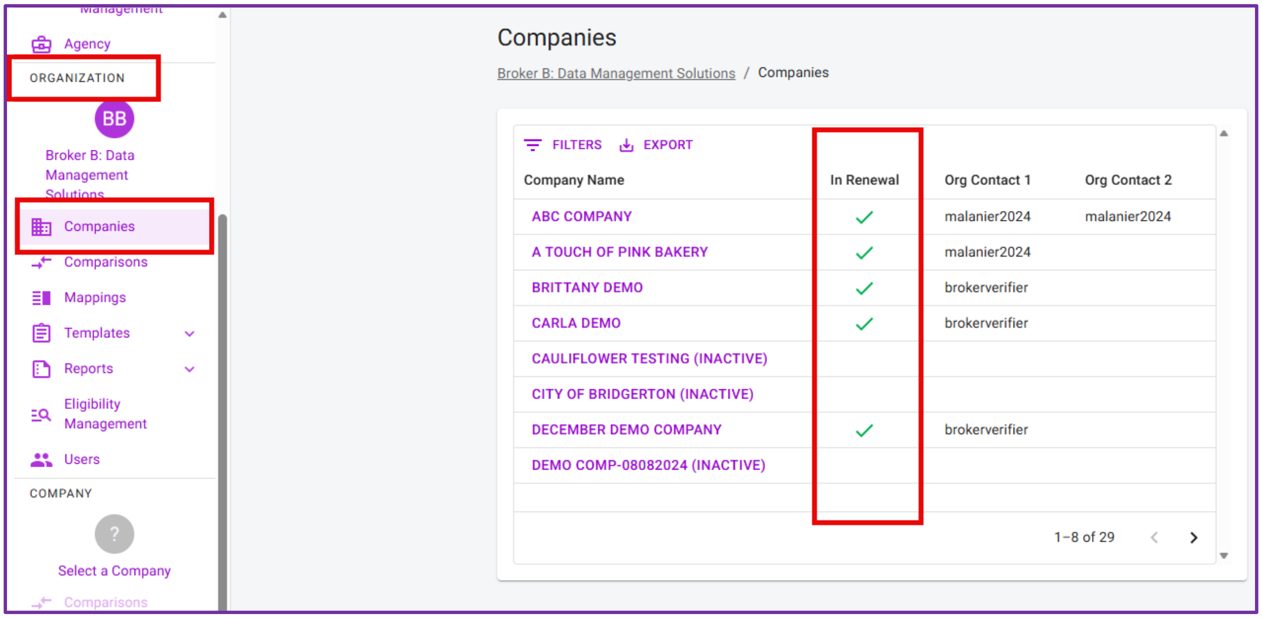


- A **final closeout email** is sent, marking the renewal complete and ready for the next cycle.

✅ 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.



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.

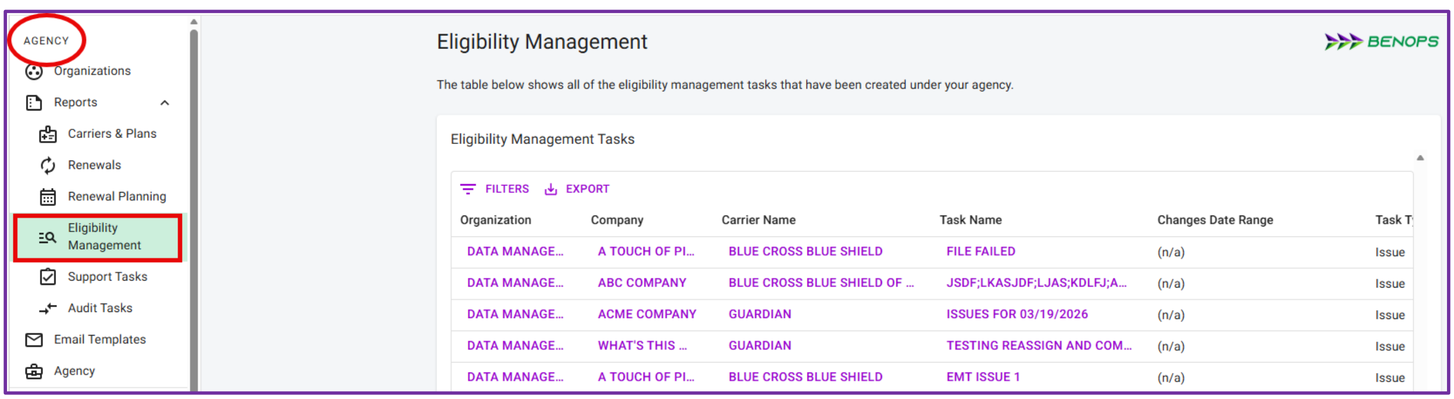
Creating a new Eligibility Management Task is straightforward, but there are a few rules to keep in mind. **Tasks can only be created by an Agency User** and may be created at **three levels**:

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

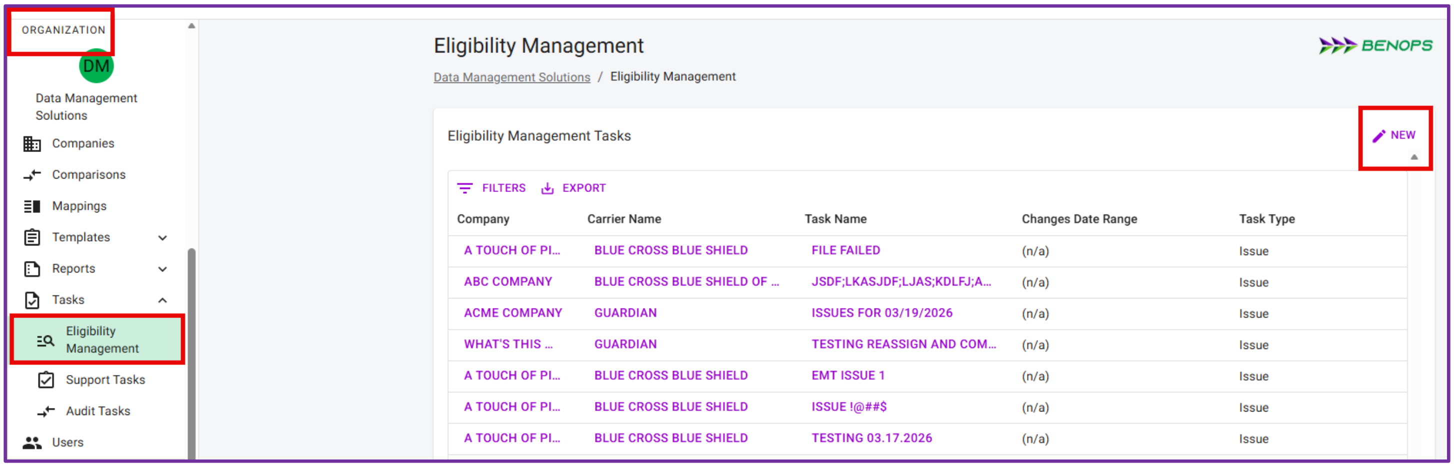
Tasks **cannot** be created at the Agency level, although they **can be viewed and exported** there.

Eligibility Management Tracking Tables:

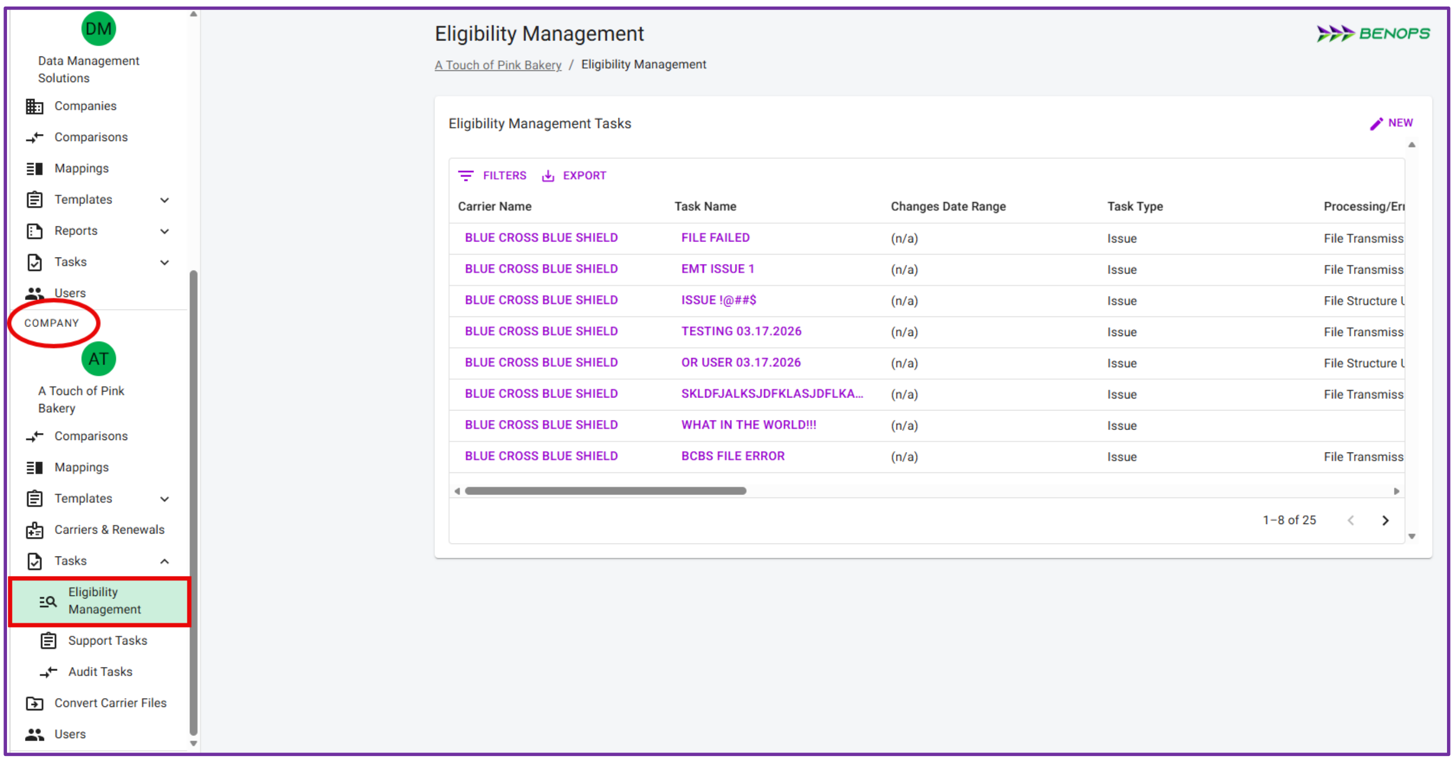
Agency:



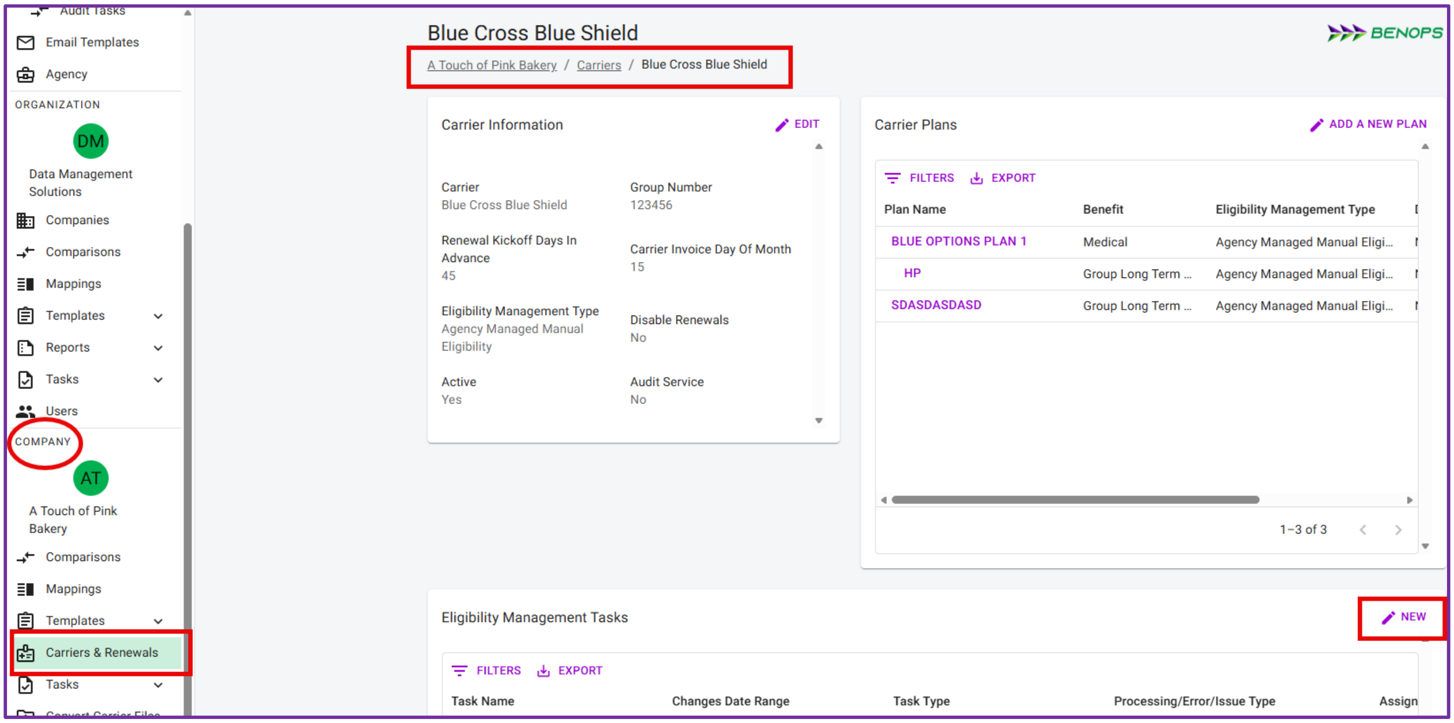
Organization:


ORGANIZATION
DM
Data Management Solutions
Companies
Comparisons
Mappings
Templates
Reports
Tasks
Eligibility Management
Support Tasks
Audit Tasks
Users
Eligibility Management
BENOPS
Data Management Solutions / Eligibility Management
Eligibility Management Tasks
NEW
FILTERS
EXPORT
Company
Carrier Name
Task Name
Changes Date Range
Task Type
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
A TOUCH OF PI...
BLUE CROSS BLUE SHIELD
TESTING 03.17.2026
(n/a)
Issue

Company:


DM
Data Management Solutions
Companies
Comparisons
Mappings
Templates
Reports
Tasks
Users
COMPANY
AT
A Touch of Pink Bakery
Comparisons
Mappings
Templates
Carriers & Renewals
Tasks
Eligibility Management
Support Tasks
Audit Tasks
Convert Carrier Files
Users
Eligibility Management
BENOPS
A Touch of Pink Bakery / Eligibility Management
Eligibility Management Tasks
NEW
FILTERS
EXPORT
Carrier Name
Task Name
Changes Date Range
Task Type
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
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
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

Company Carrier Level:



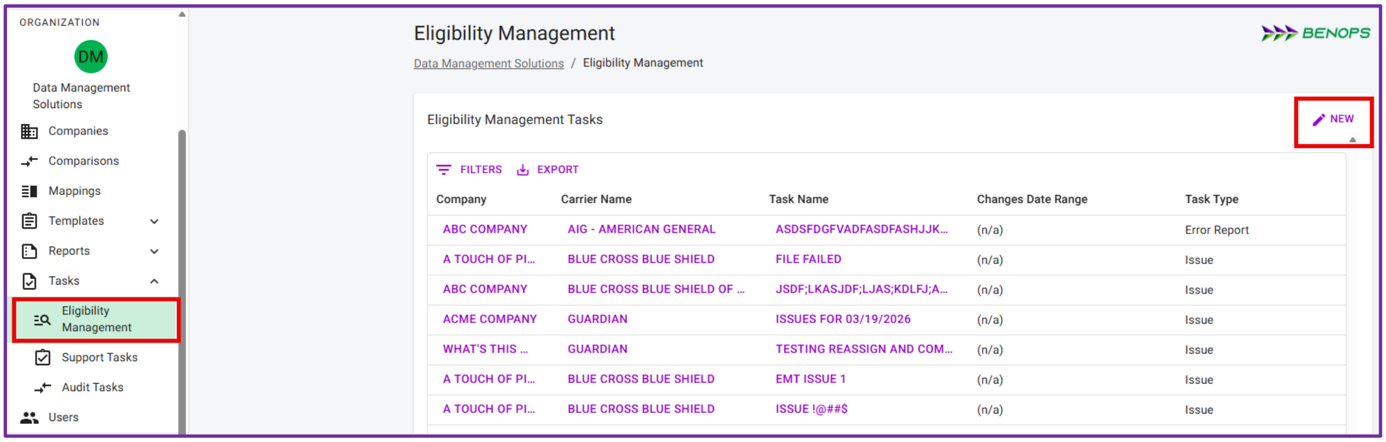
The fields presented will vary slightly depending on where the task is created and what task is selected.

- 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

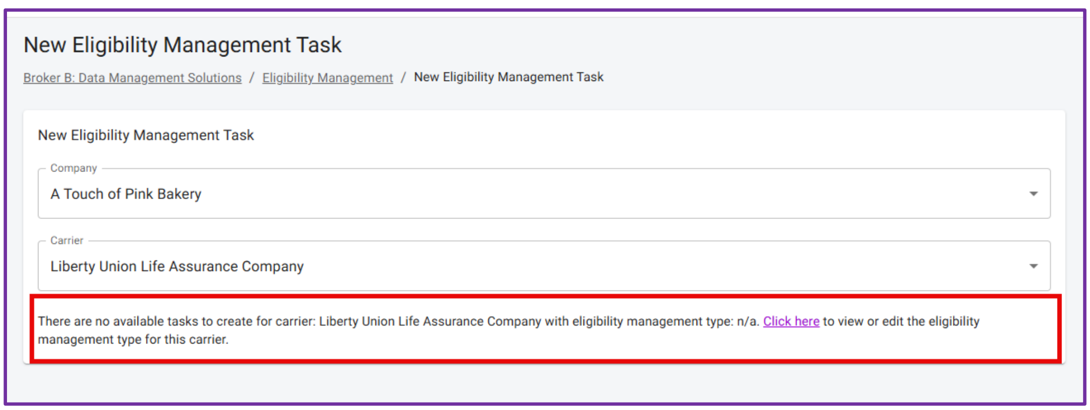
1. **Navigate to the organization or company** where the task will be created.
2. Select **Eligibility Management** from the left menu under **TASKS**, then click **NEW**.



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.

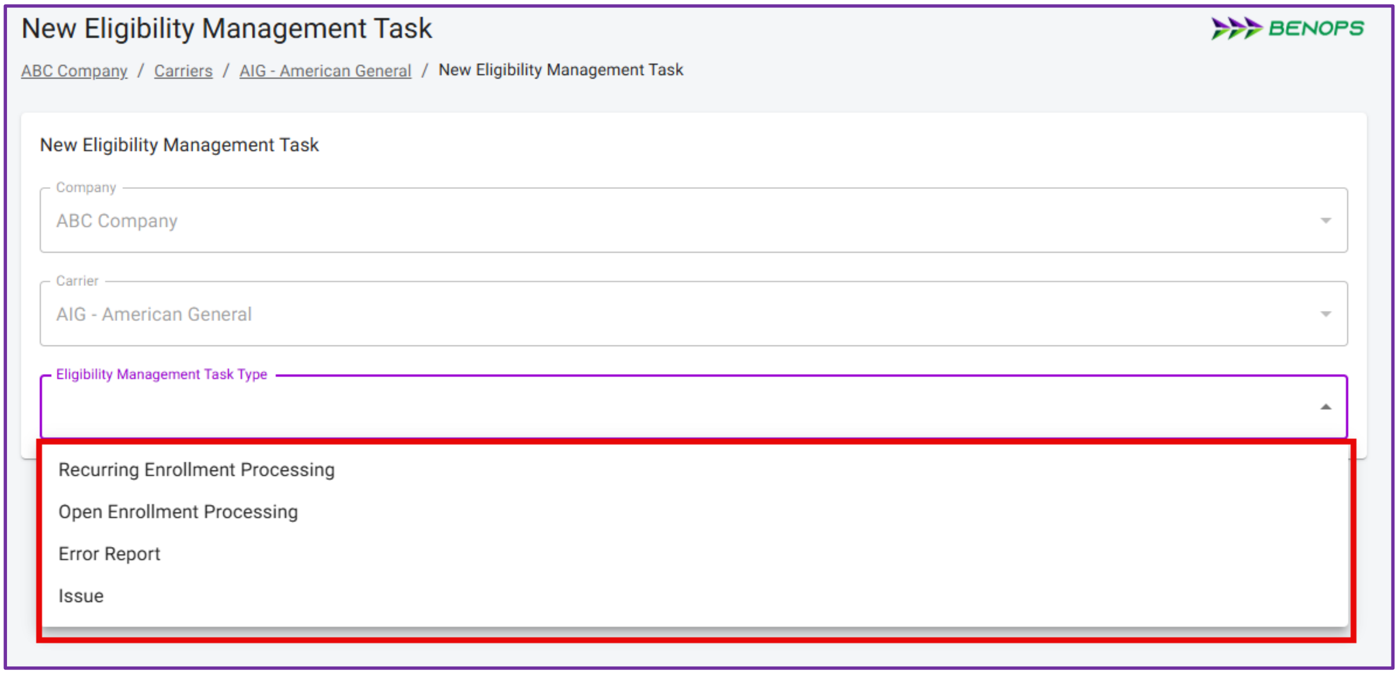
If you see the highlighted message indicating the eligibility type is not supported, the type must be updated before a task can be created. This typically indicates that the field is blank.



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



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**.

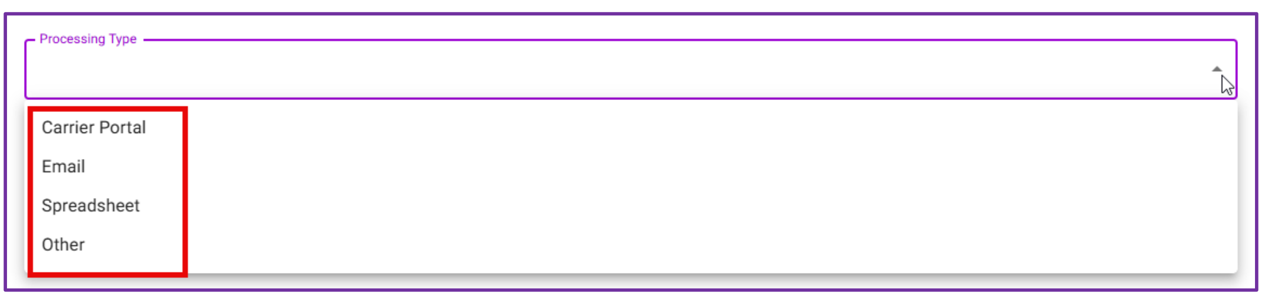
CHANGES TO DATE: Enter or select the ending date of the change window.
Example: **12/21/2025**

***** 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.**

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



Required Counts for Completion:

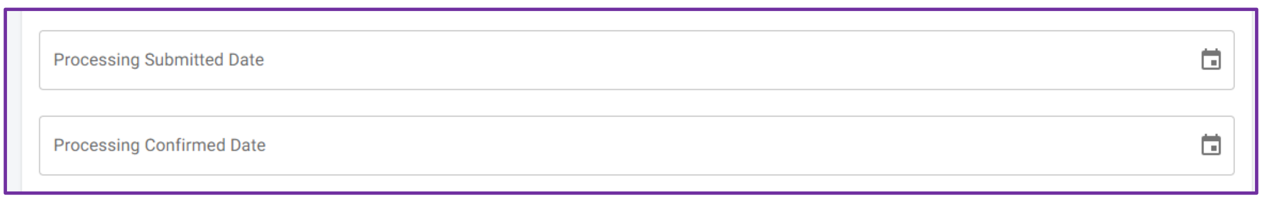
These fields are required for all processing types.
The task may be saved with these fields blank, but **cannot be completed** until they are filled in.

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

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



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

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:

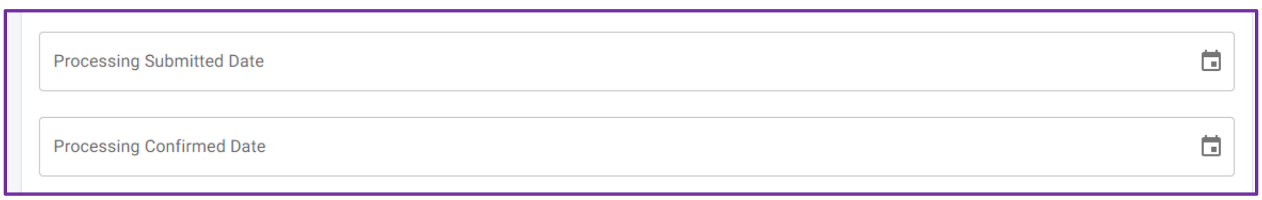
ERROR REPORT RECEIPT TYPE: Select how the error report was provided.

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



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

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.

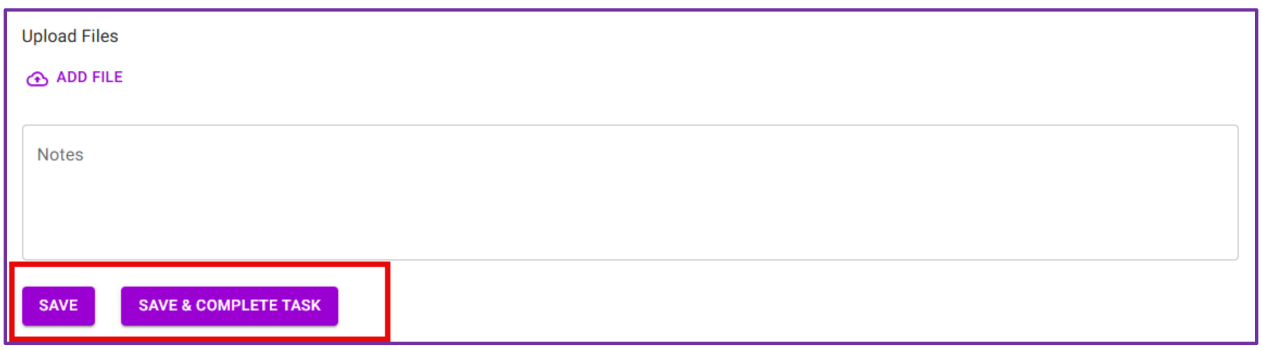
ISSUE TYPE: Select the issue for this task.

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

Final Steps for all Task Types

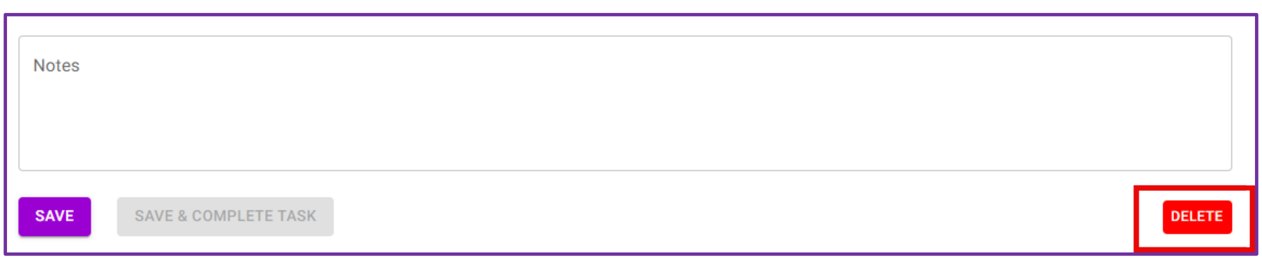
- Add any relevant details in the Comments and/or Supplemental Information sections.
- Click **SAVE** or **SAVE & COMPLETE TASK**.

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



Important Notes

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



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:

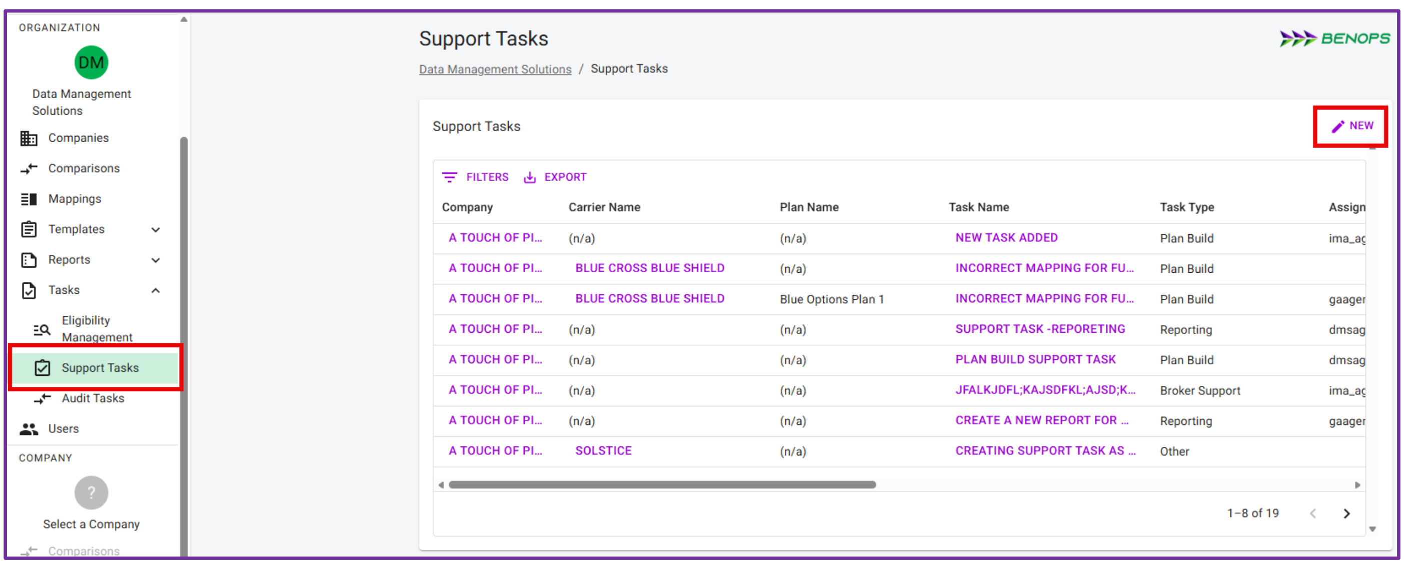
- Submitting an ACA-related question
- Reporting an incorrect plan build
- Requesting general broker or HR support

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.

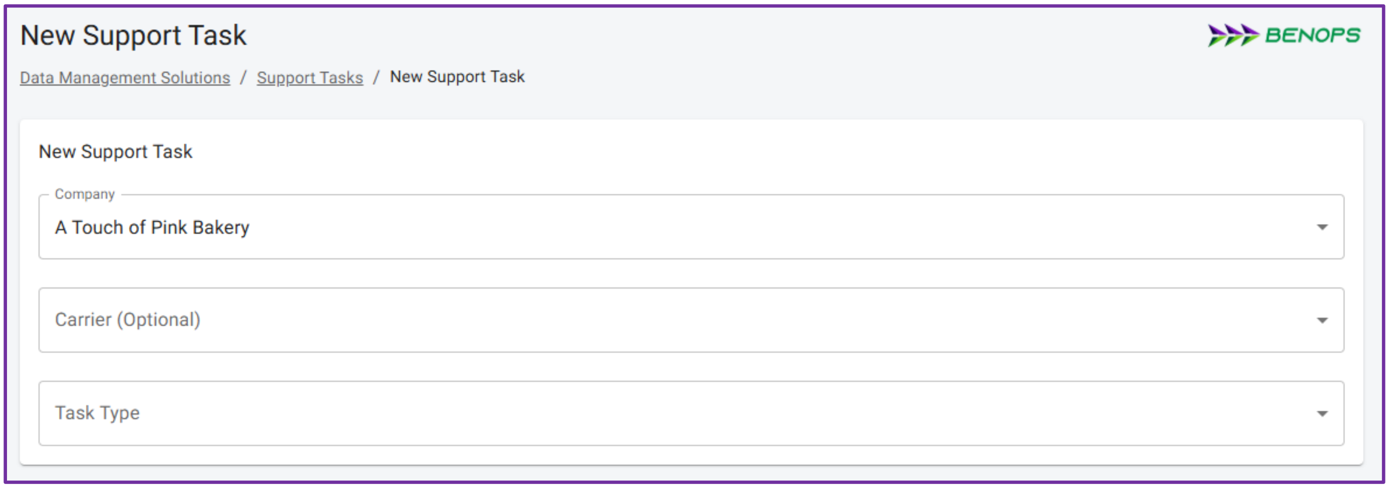
- When created at the **organization level**, you will need to manually select both the company and the carrier (optional).
- When created at the **company level**, the company is pre-populated for you.
- When created at the **company carrier level**, the company and carrier information is pre-populated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



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.



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.

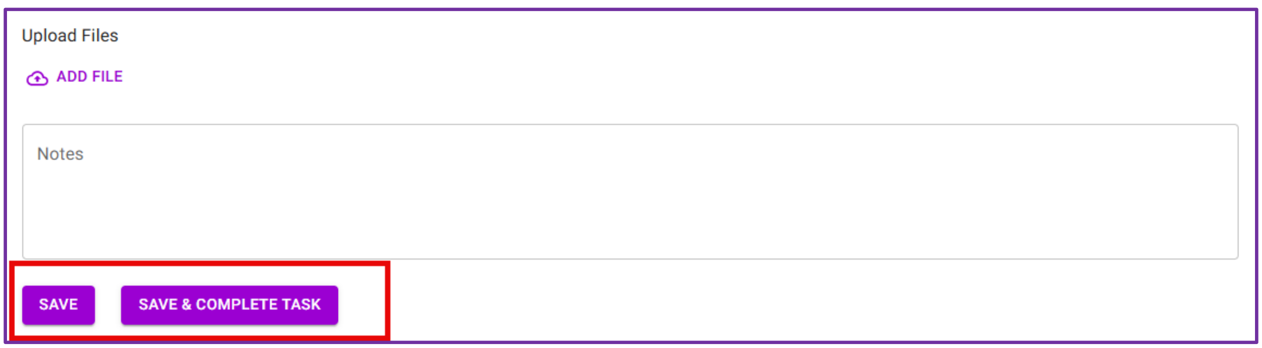
The assigned user will receive an email notification indicating that a new task has been assigned to them, along with a direct link to the task so they can access it without navigating through the application. If the assignee is changed after the task has been created—but before it is completed—the newly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

Final Steps for all Task Types

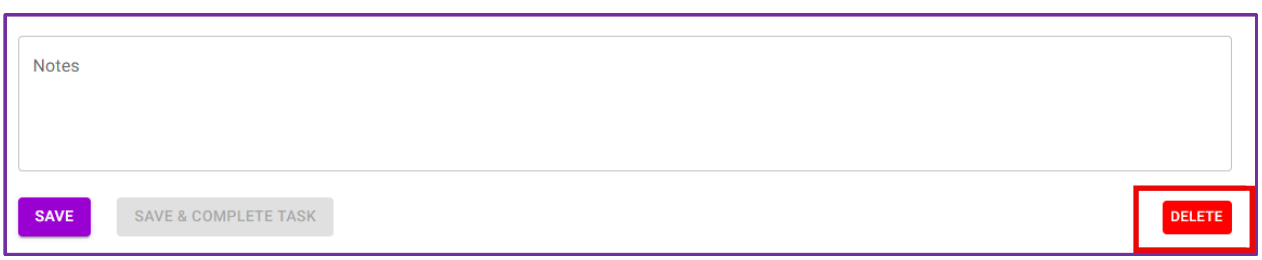
- Add any relevant details in the Comments and/or Supplemental Information sections.
- Click **SAVE** or **SAVE & COMPLETE TASK**.

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



Important Notes

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



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**:

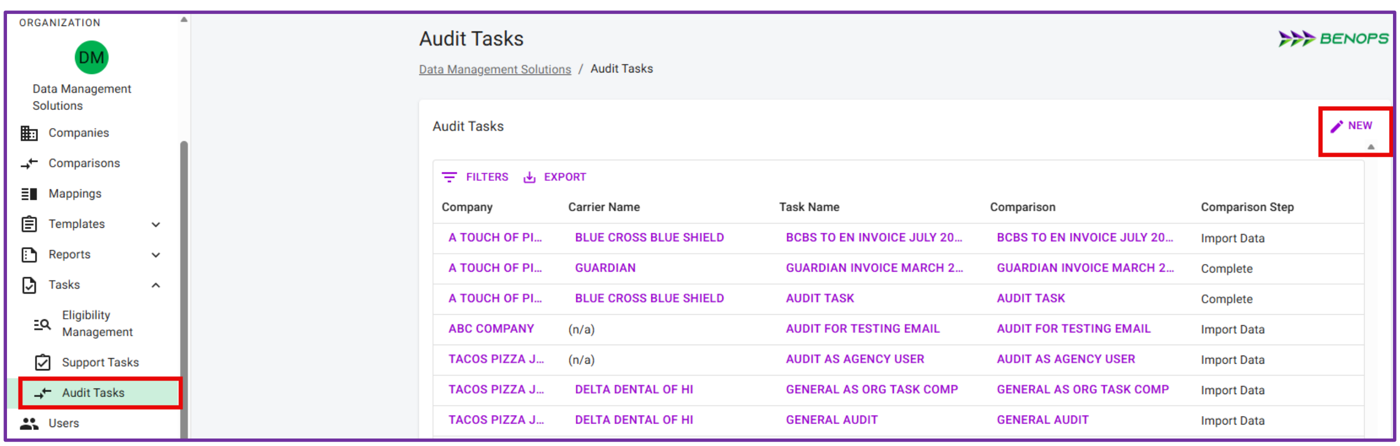
- The task is automatically assigned to the **designated Agency Support Email**
- **Agency users** can reassign the task as needed to ensure proper ownership and workflow management

After the comparison is completed:

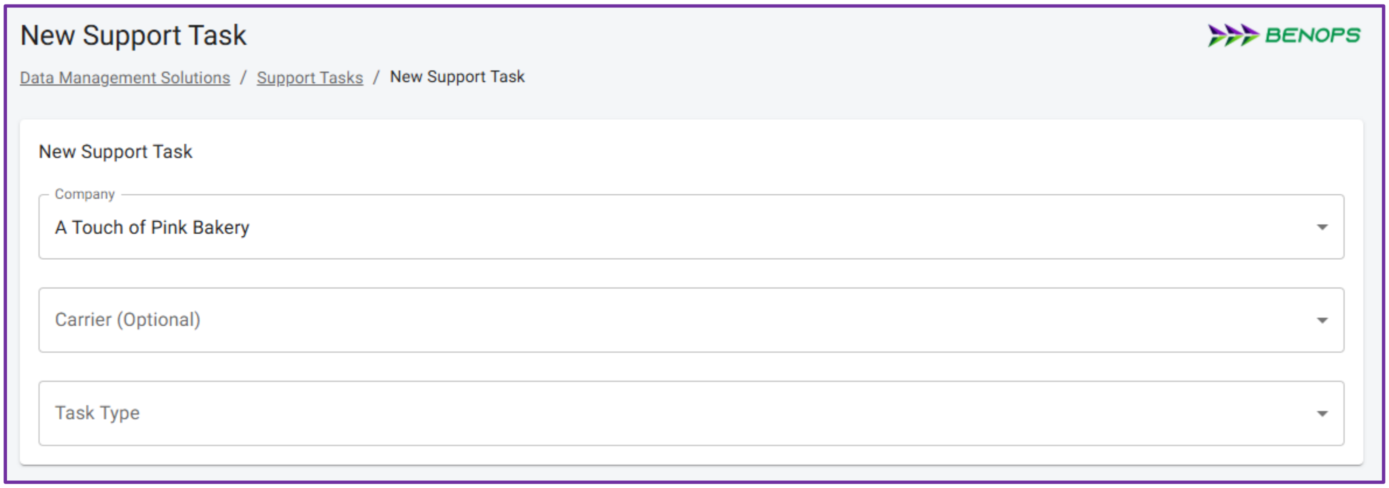
- **Agency users** can close the Audit Task directly within the audit

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**.



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.



4. **Audit Type**
   a. Select from the dropdown:
      - General Audit
      - Enrollment Audit
      - Post Open Enrollment Audit
      - Pre-Production Audit
      - Post Production Audit
      - Invoice Reconciliation

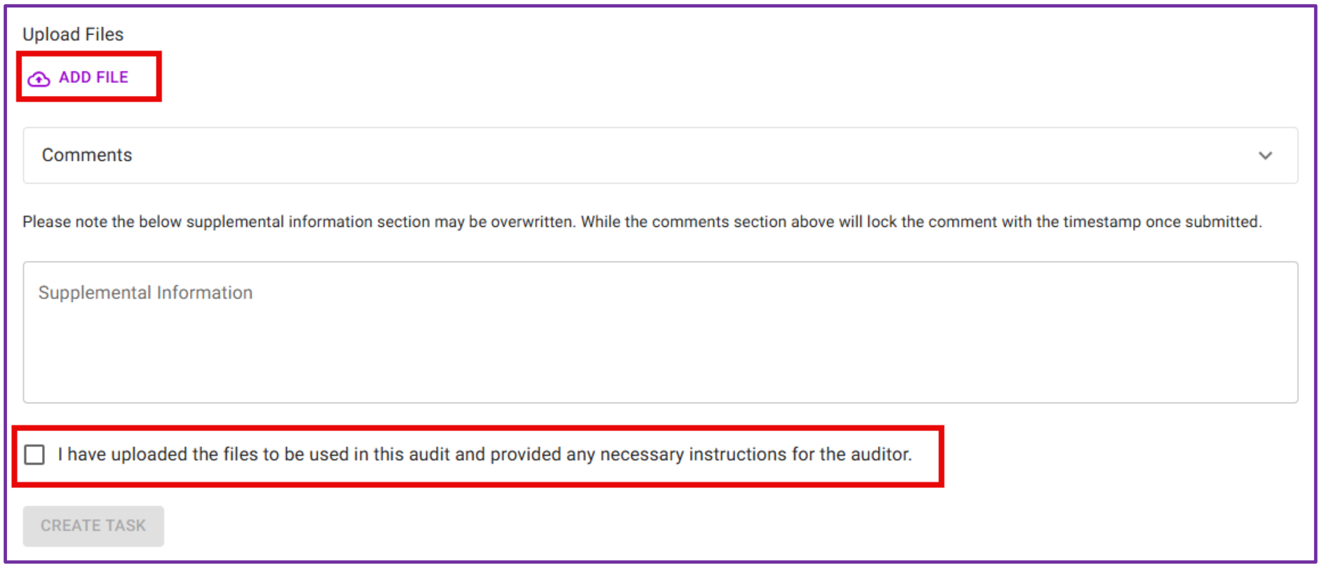
Required Fields for Creating an Audit Task

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.

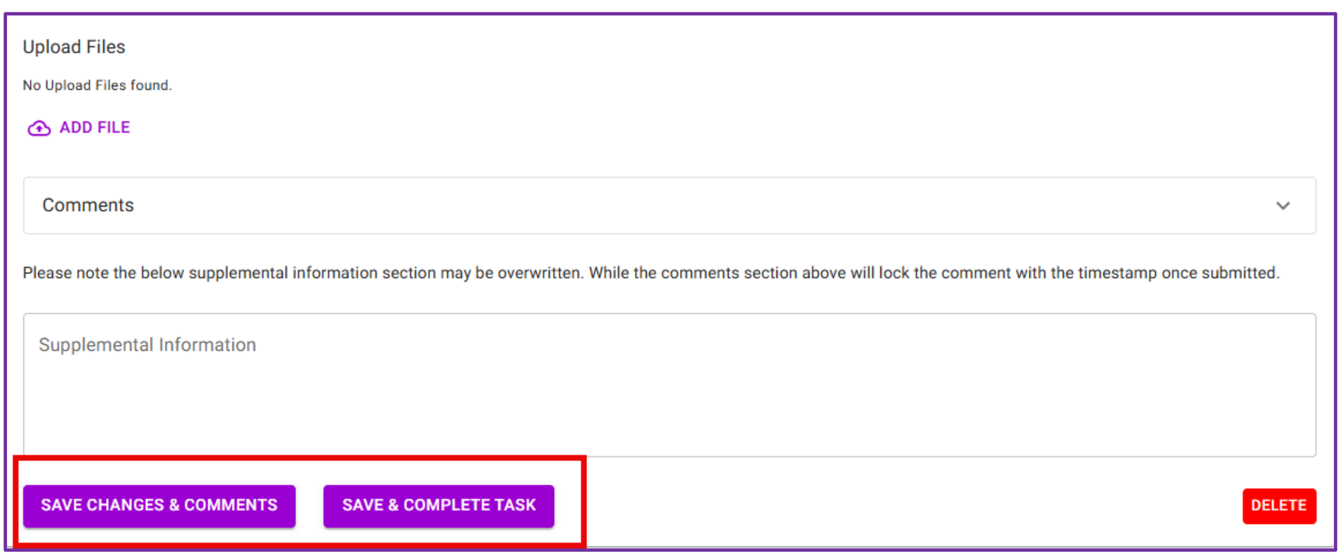
Please note: If the Audit Task is created by an **Organization user**, all supporting files must be uploaded during the task creation process.



Final Steps for all Task Types

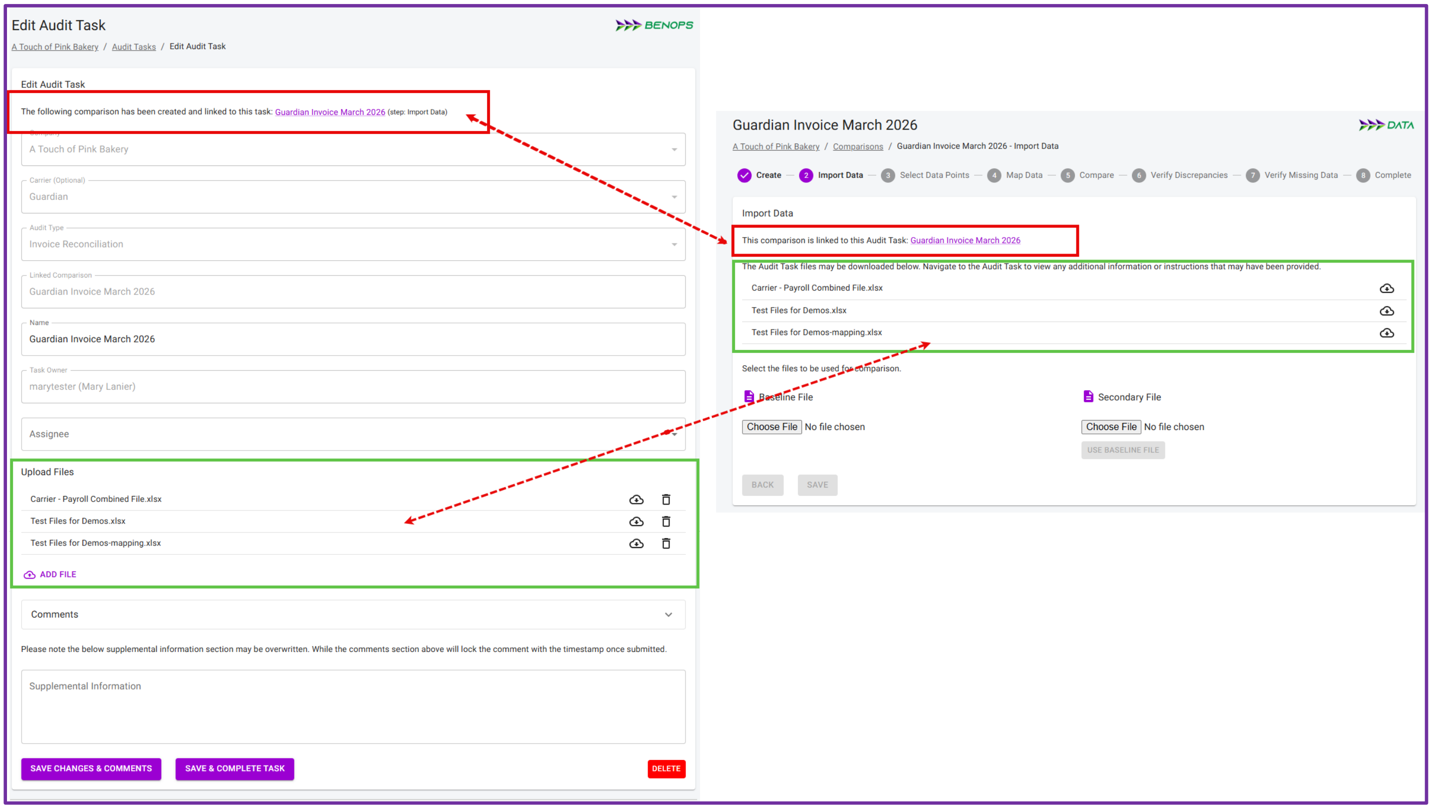
- Add any relevant details in the Comments and/or Supplemental Information sections.
- Click **SAVE CHANGES & COMMENTS** or **SAVE & COMPLETE TASK**.

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.

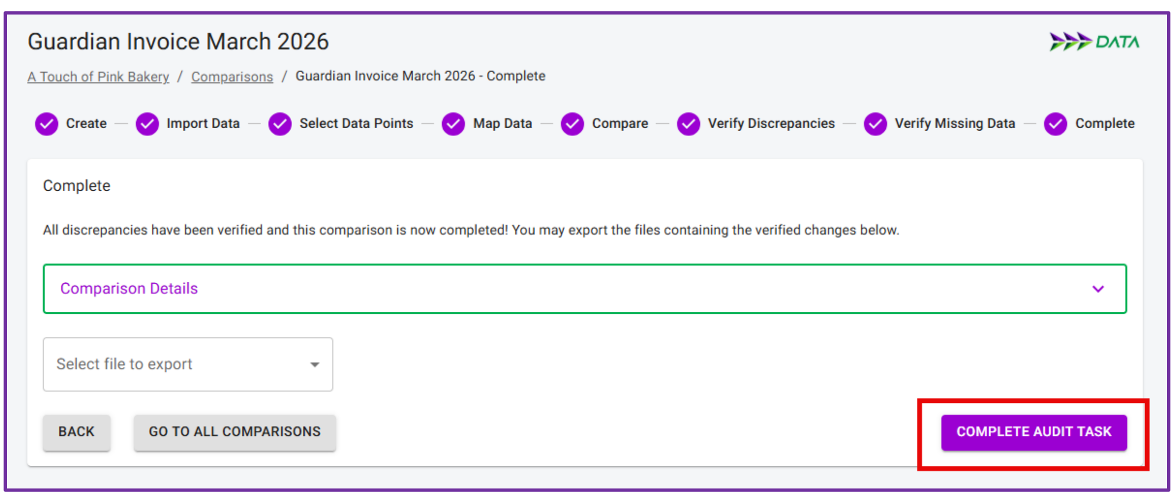


Important Notes:

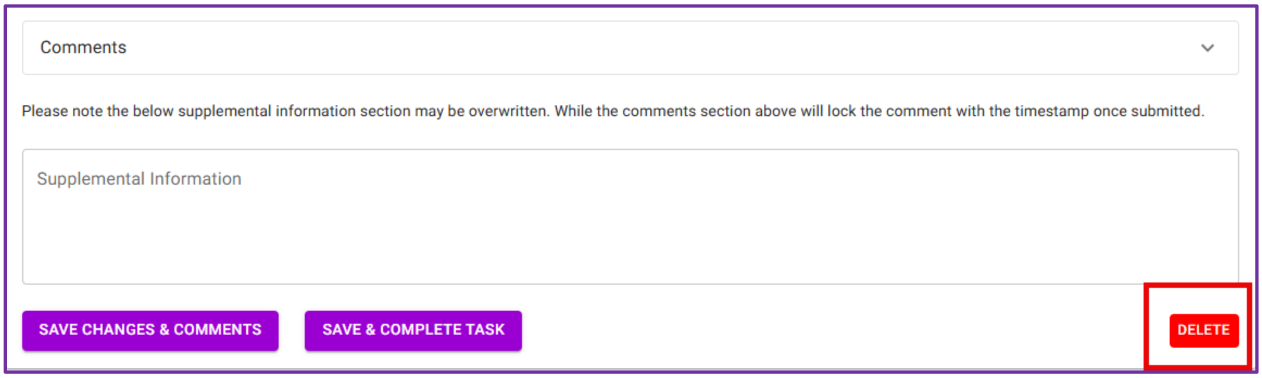
- Links to both the **Task** and the **Audit** are available within their respective views. From within the audit, users can navigate directly to the associated task. From within the task, users can access the related audit. This allows users to easily toggle between the task and the audit for efficient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



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



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



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:

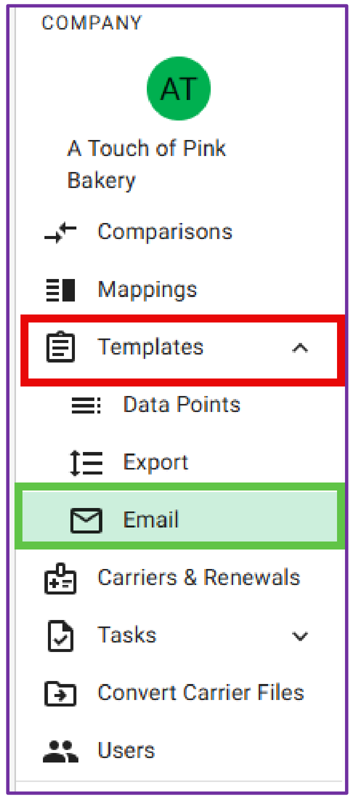
- Audit Task Assignment
- Comparison to Auditor
- Comparison to Verifier
- Eligibility Management Task Assignment
- Eligibility Management Task Assignment – Error Report
- Renewal Task Assignment
- Renewal Task Broker Managed
- Renewal Task Complete
- Renewal Task Kickoff
- Renewal Task Kickoff Follow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

Key Features:

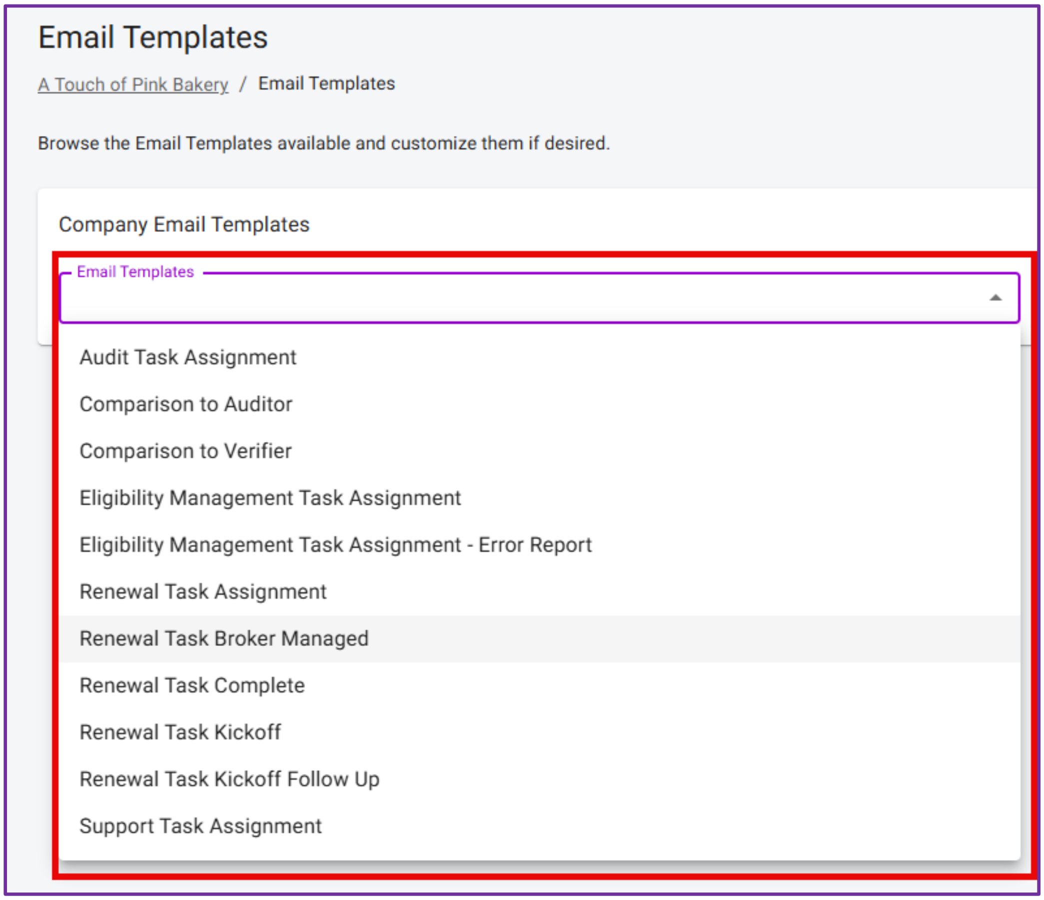
1. Customizable Templates:
   - Email templates can be found in the template library at both the organization and company levels.
   - Default language can be fully customized to suit user preferences.
2. Additional Tokens:
   - Include dynamic data like carrier name, discrepancy counts, and missing 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

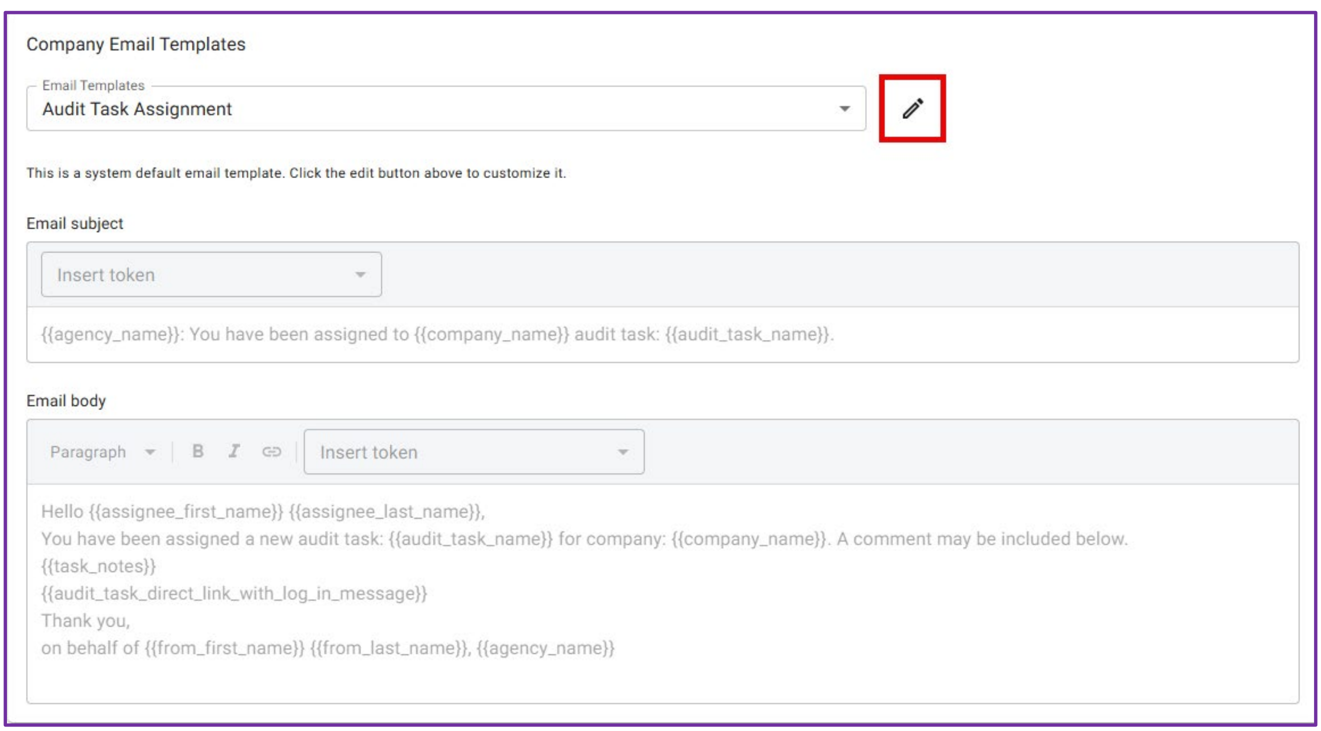
1. To customize an email, navigate to the **Template Library** at the **Company** level, then select **EMAIL**.
   - At the **Company** levels, a dropdown will be available for selection.

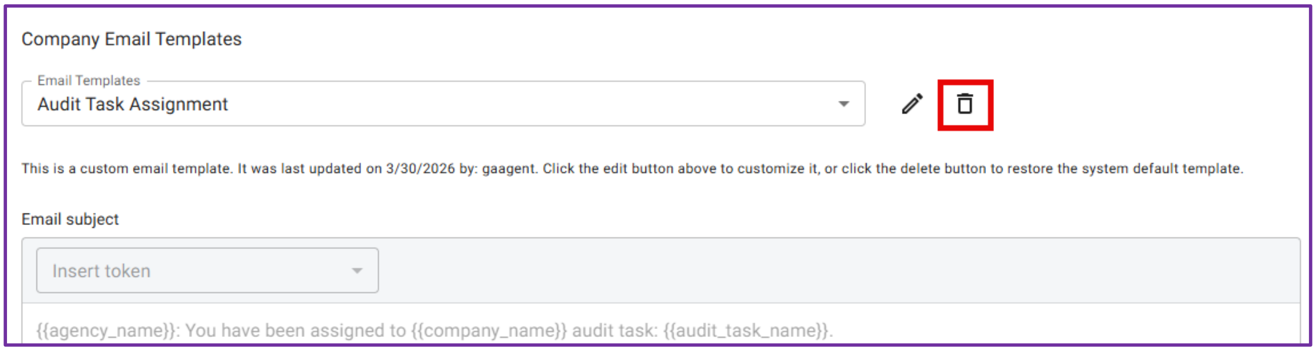


2. From the Email templates dropdown, select the desired template to customize.



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





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.

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.

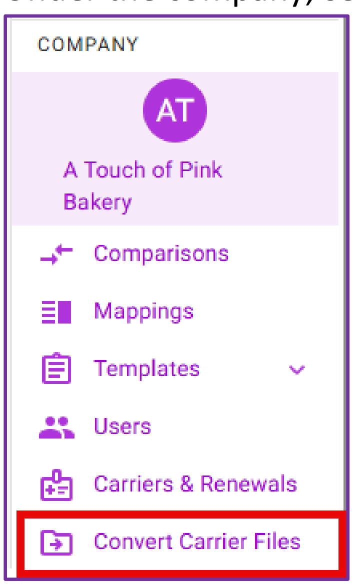
What This Functionality Does:

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.

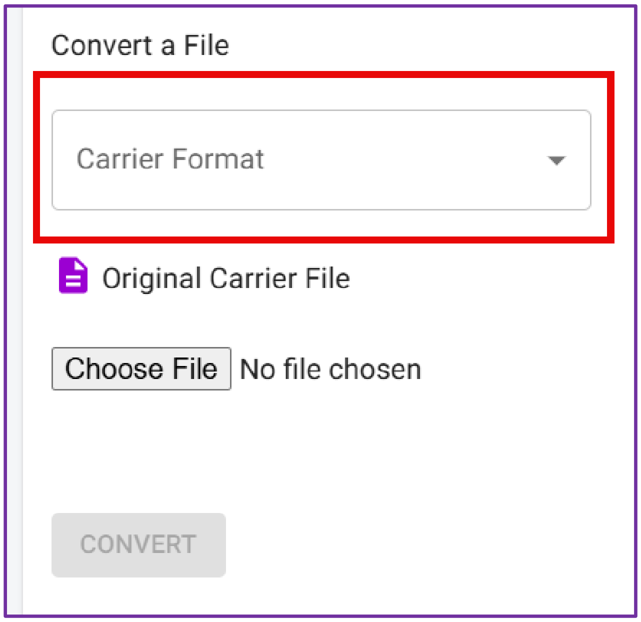
The converted file is then ready for audit use, significantly reducing manual effort and improving efficiency.

To convert a carrier invoice:

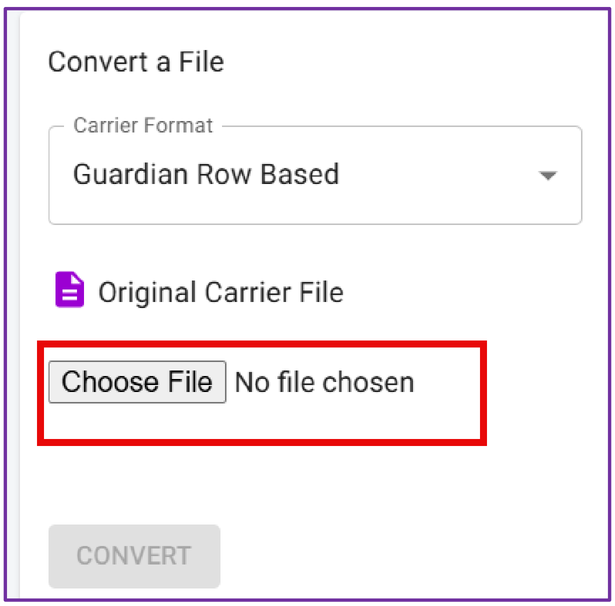
1. Navigate to a company if organization user.
2. Under the company, select Convert Carrier Files in the left-hand menu.



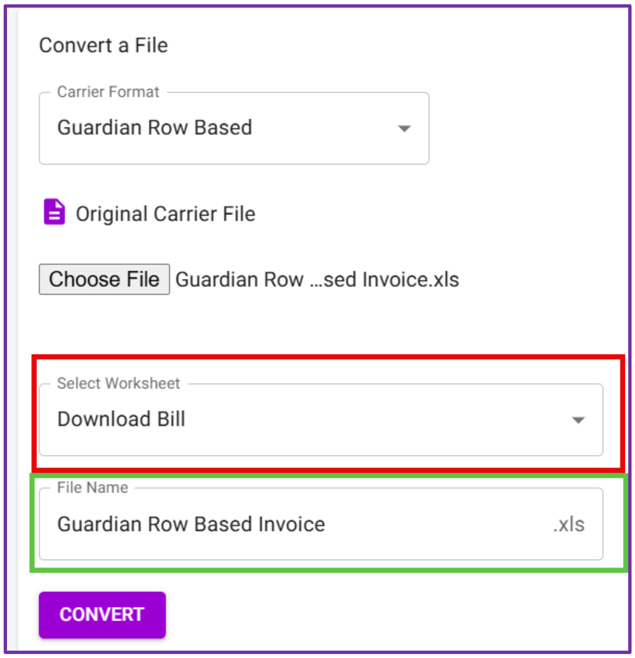
3. Select Carrier Format dropdown and then the applicable carrier file.



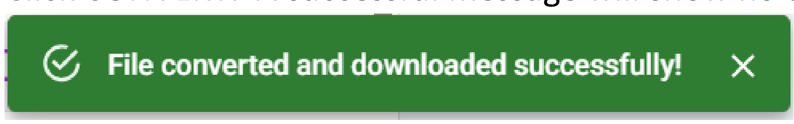
4. Click Choose File and select the carrier invoice



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



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



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:

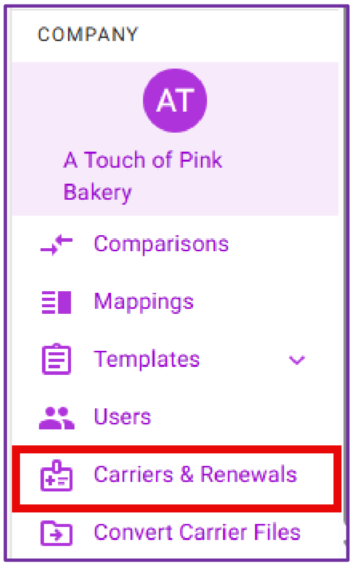
- Company Name (Required and must match company name in application)
- Carrier Name (Required and must match carrier name found in Import Template)
- Group Number (Required)
- Renewal Month (Required)
- Renewal Kickoff Days in Advance (Can choose between 30 to 90 days)
- Carrier Invoice Day of Month (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.

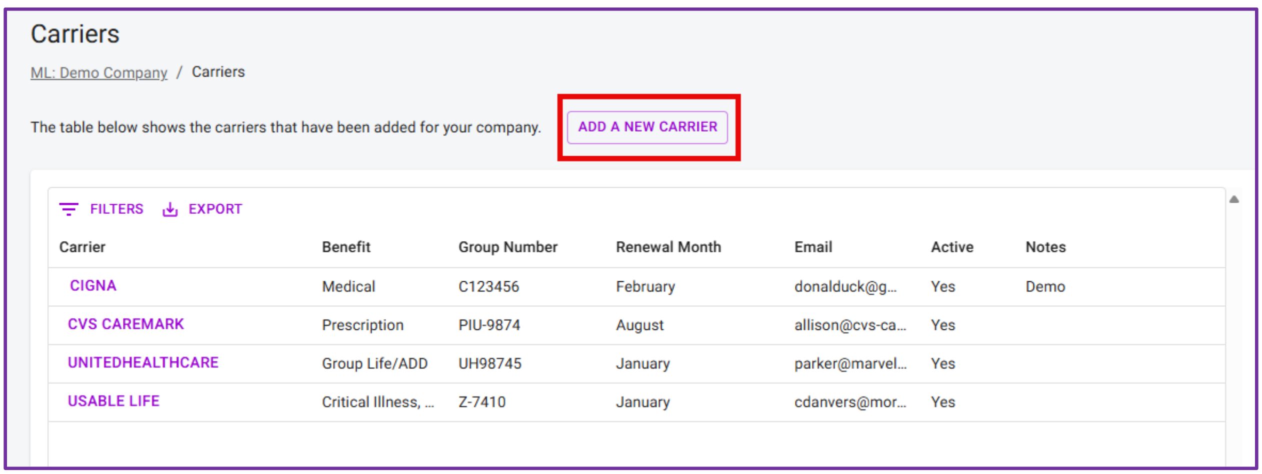
Carrier information tracking, however, is only available through the Platinum Elite or Subscription Based Audits subscription plans.

Manually Add Carrier

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

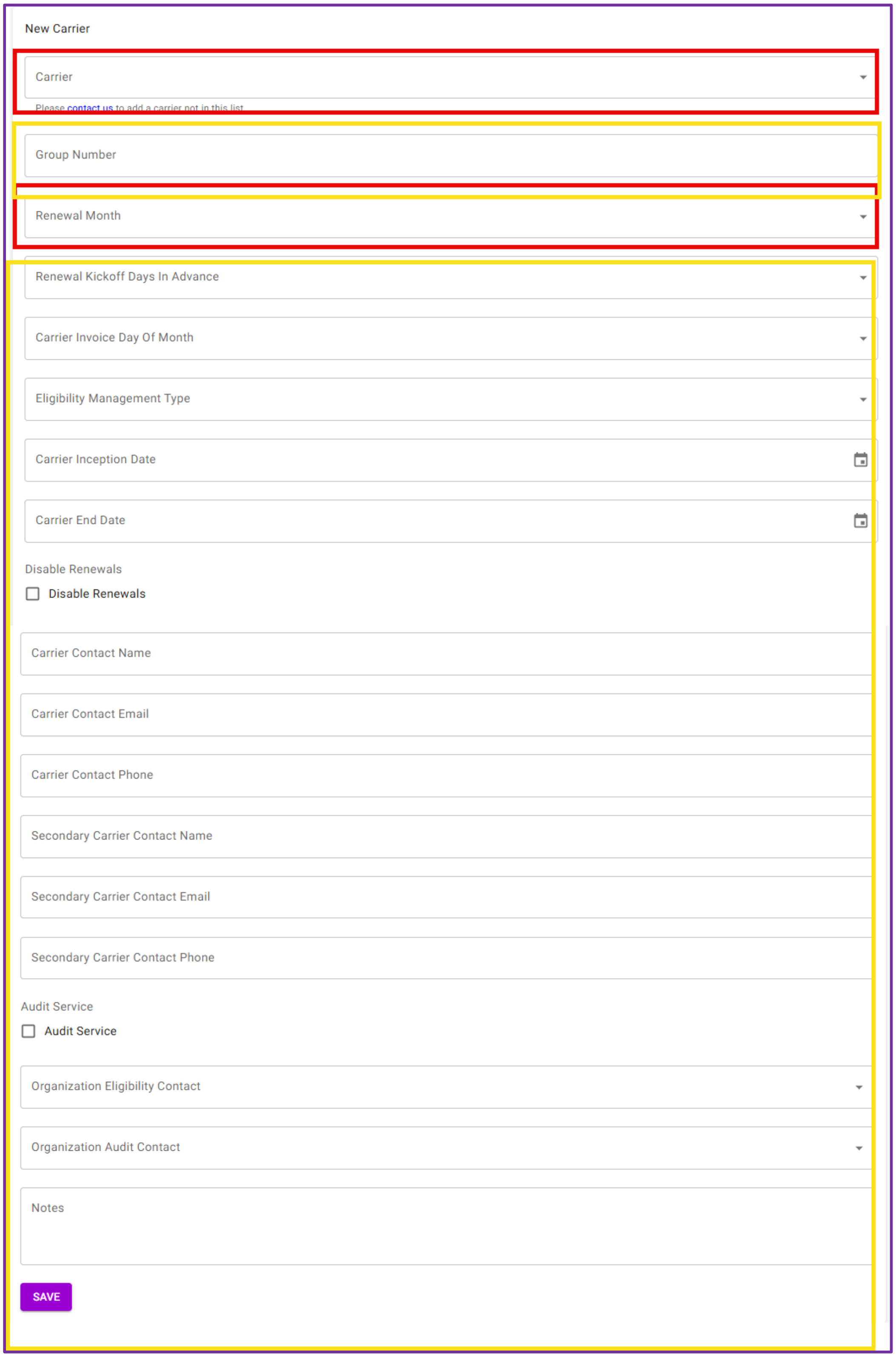


Click ADD A NEW CARRIER



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)]
- 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

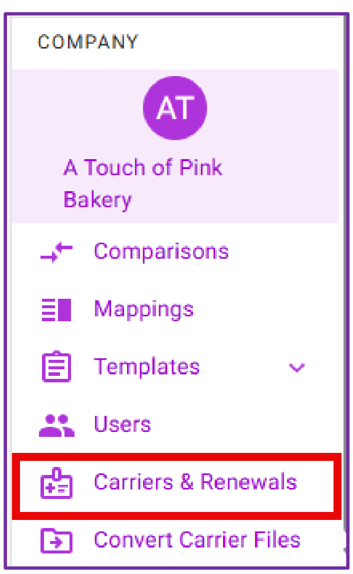
The Streamline application provides the option to manually add carrier plan information for a company and a specific carrier as well as an import option. The following information can be added to the application:

- 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)

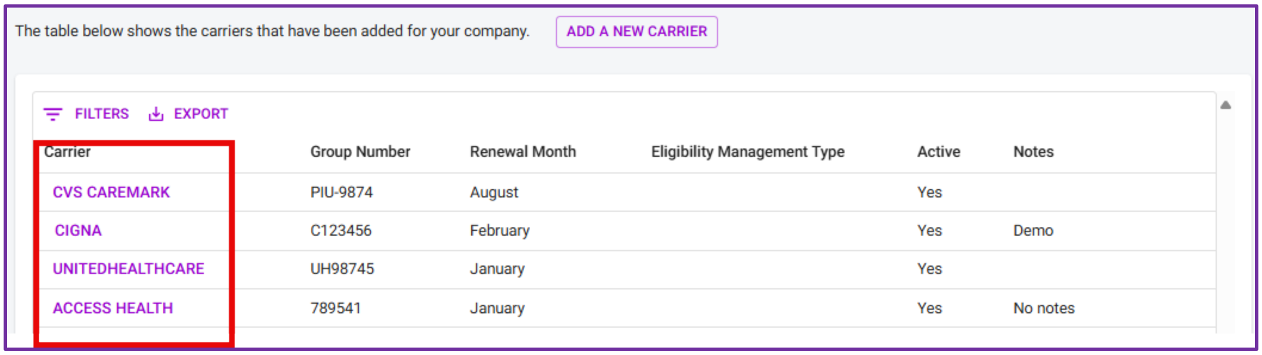
Carrier plan information tracking, however, is only available through the Platinum Elite or Subscription Based Audits subscription plans.

Manually Add Plan

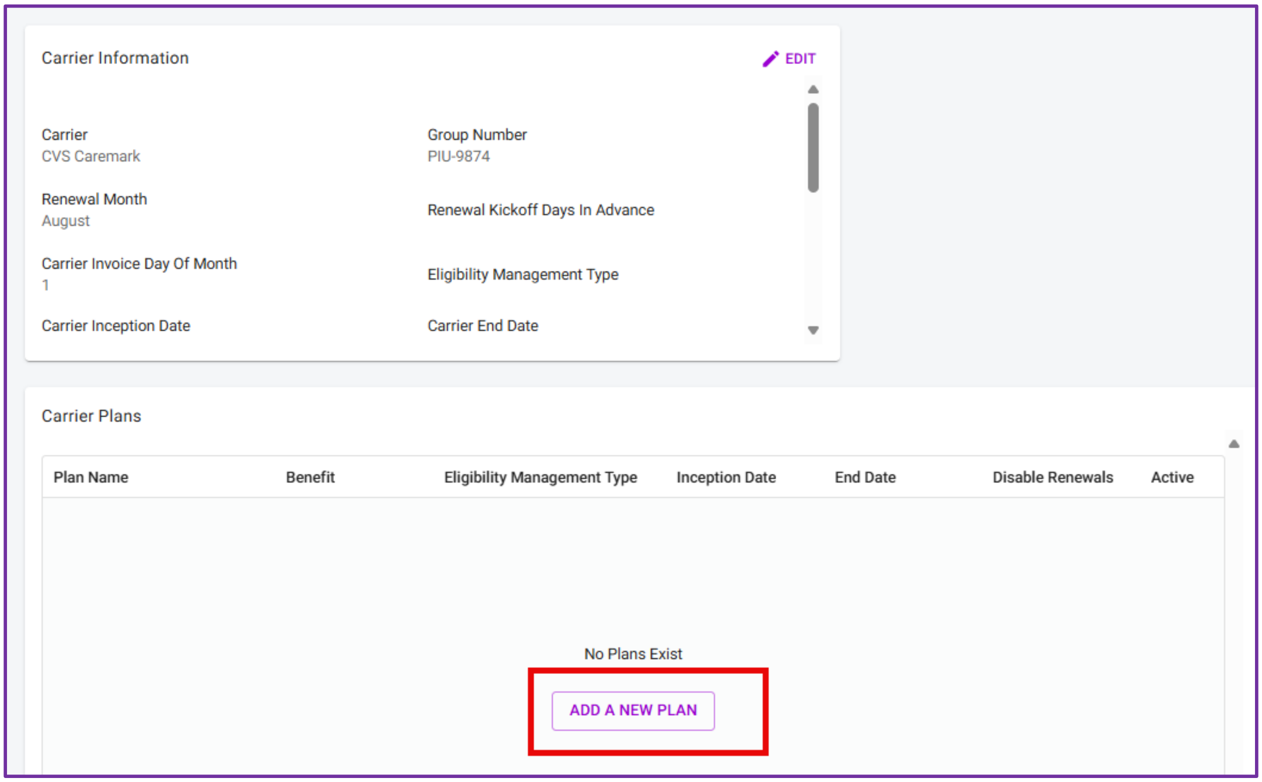
Plan information can be manually added on the Company level by selecting Carriers from the left menu.

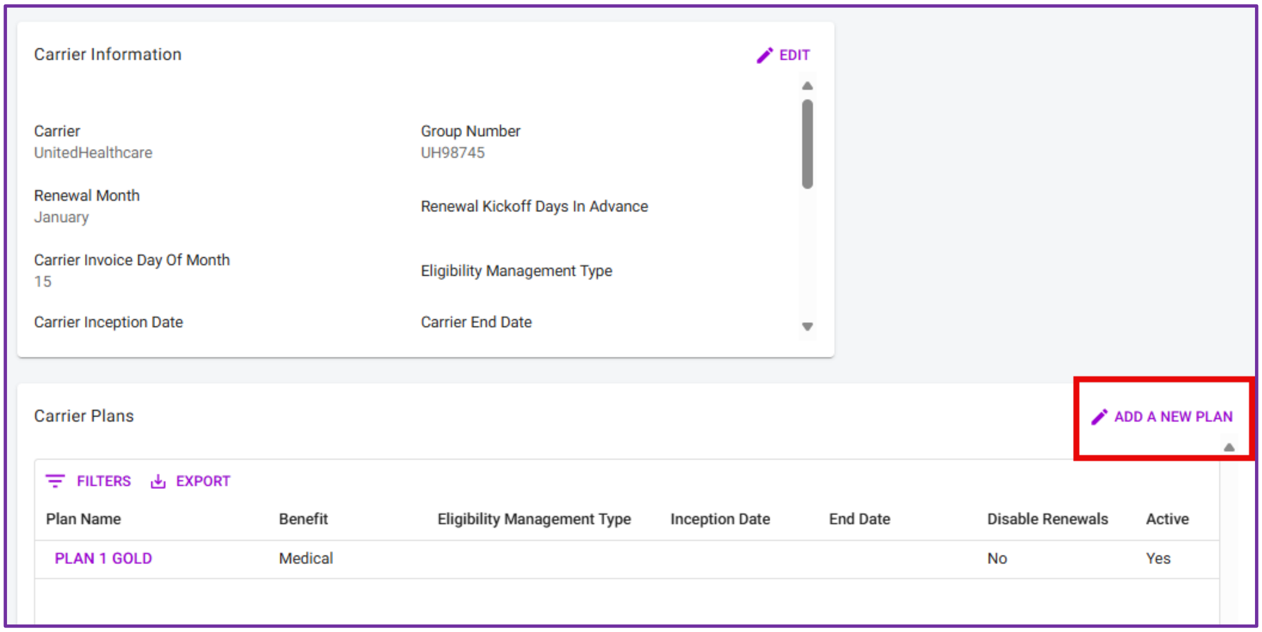


Select the carrier that you would like to add a plan to. Please note that the carrier has to be added prior to adding a plan.

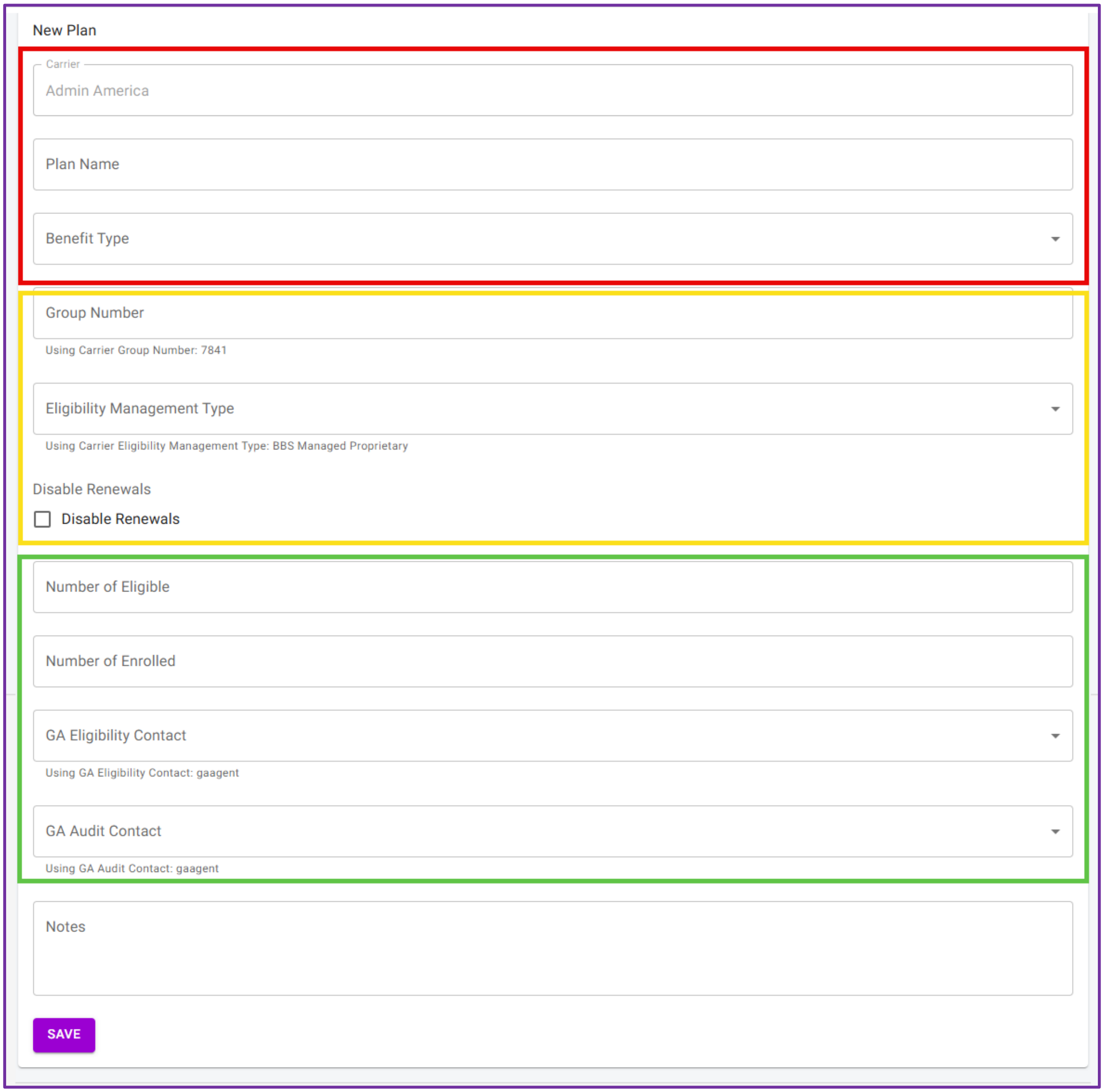


Click ADD A NEW PLAN. The location of ADD A NEW PLAN will vary if there are existing plans under the carrier.





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.

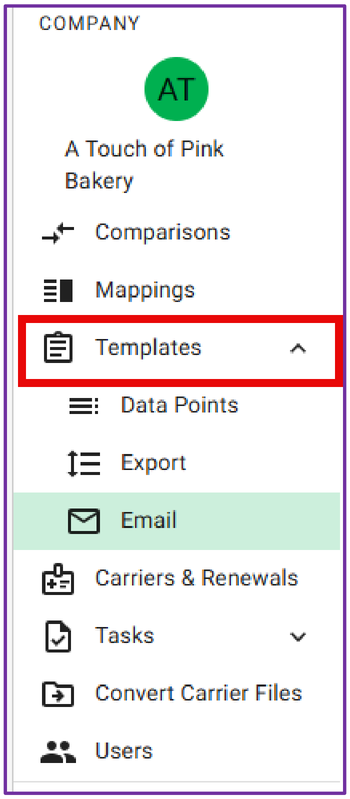
PLEASE NOTE: Company admins which are available under our Platinum Elite subscription will only have access to the templates that are created under their specific company.

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.

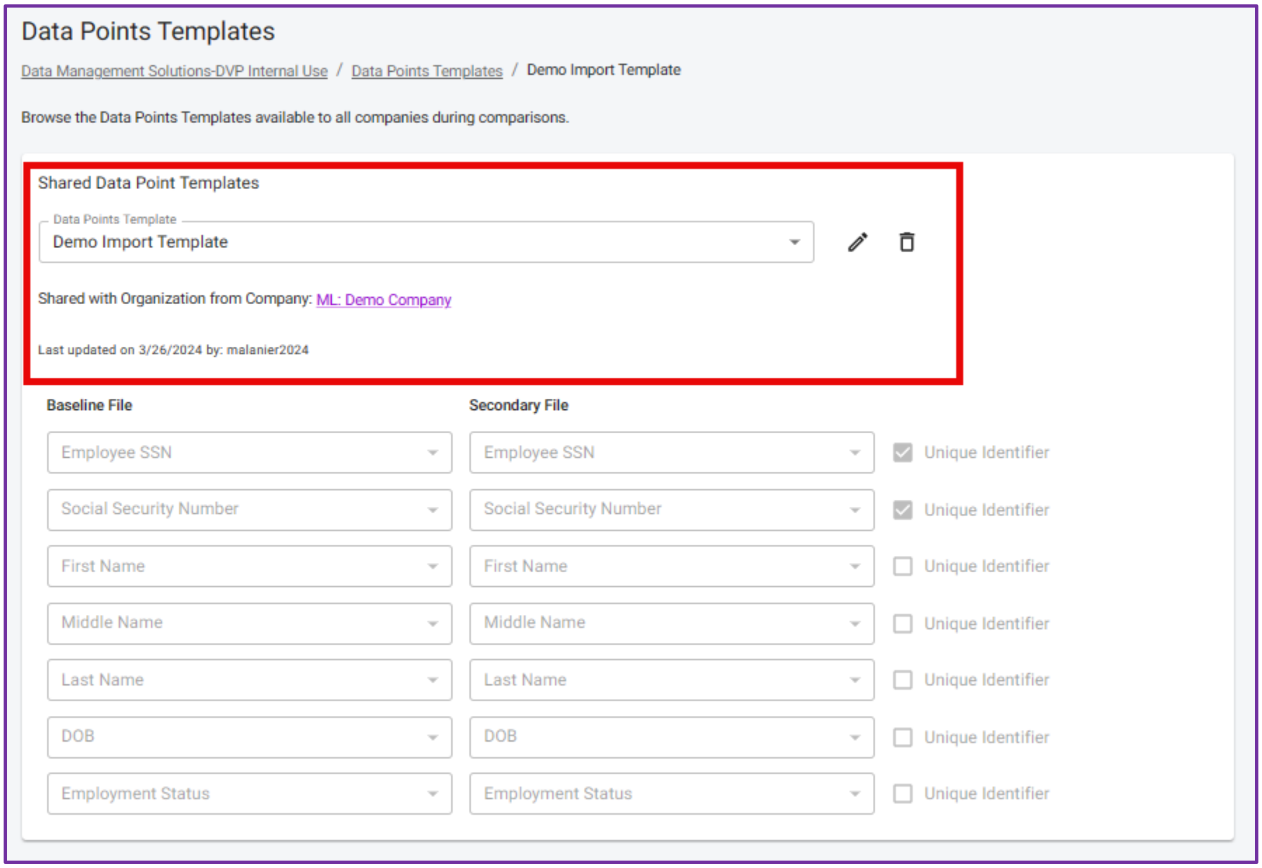
The email template library contains the default system generated emails on the company level. Please note that Email customization is only available on the Platinum Elite and Subscription Based Audits plans.

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

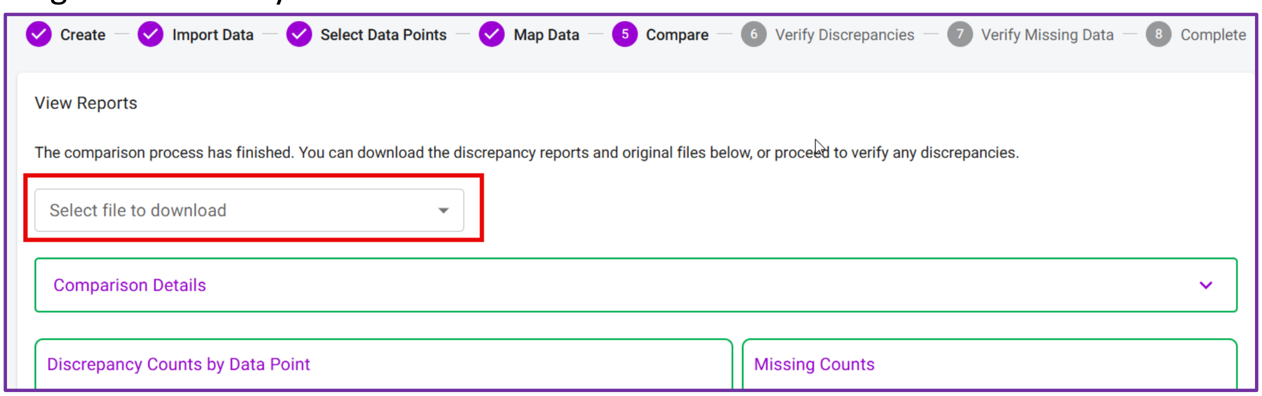
The Streamline application provides several downloadable reports:

Audit Reports

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

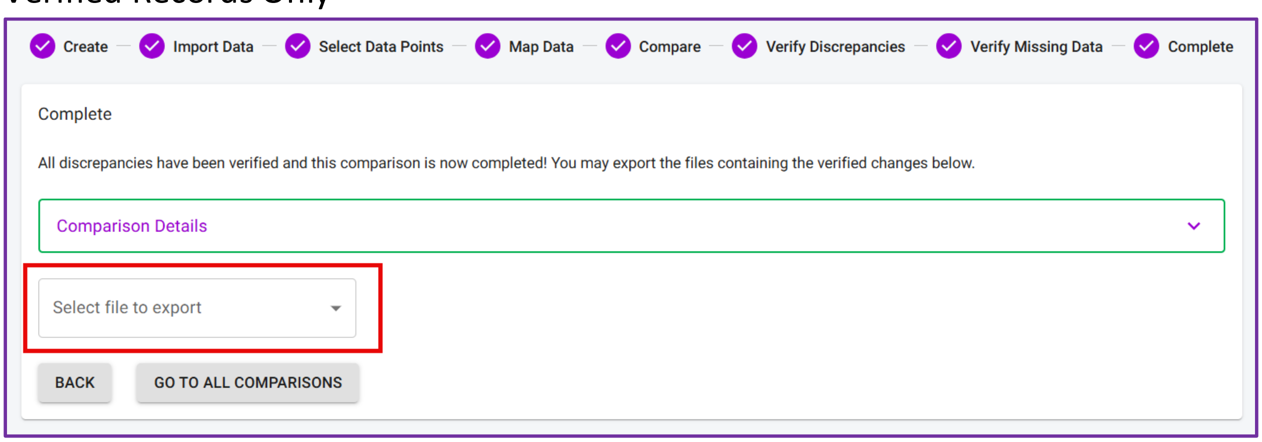
The first set of reports are available on Step 5 Compare:

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



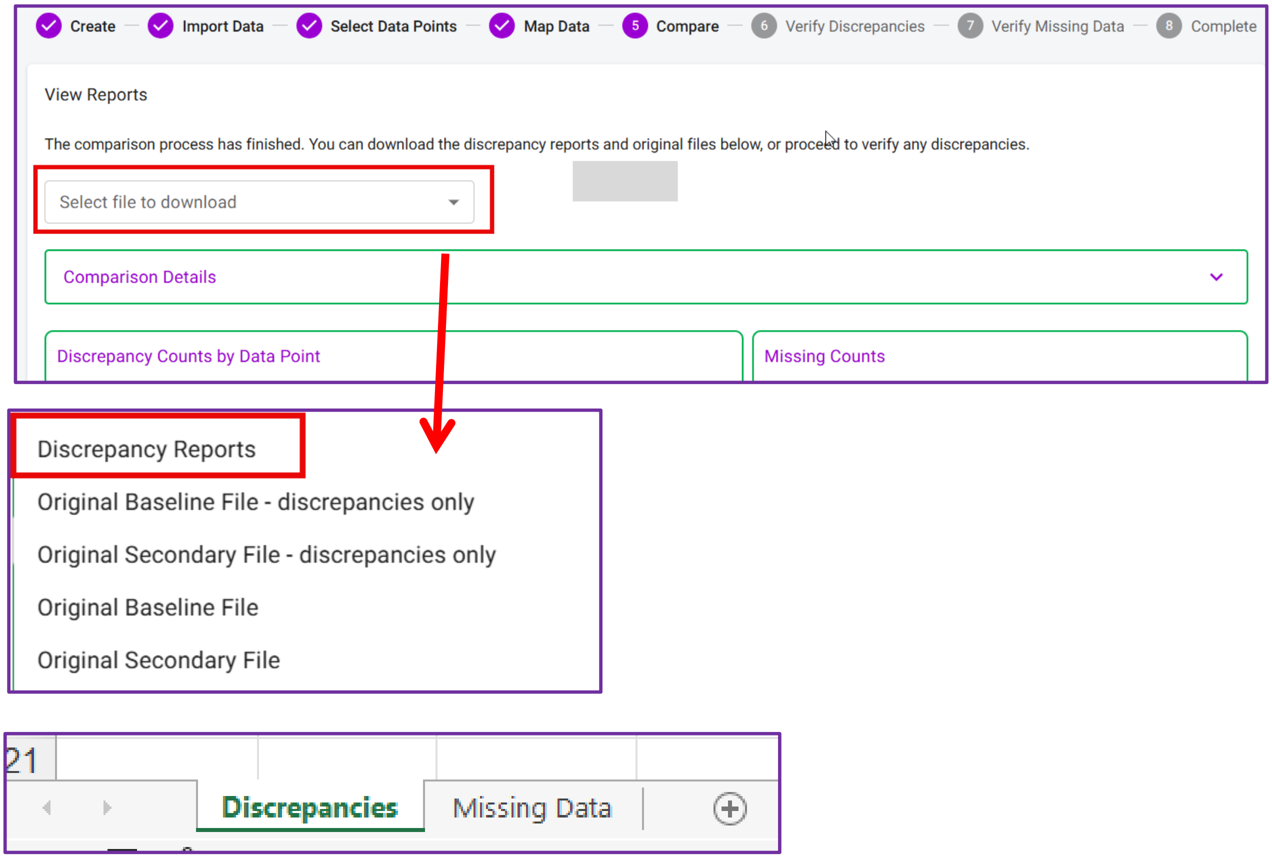
The second set of reports are available on Step 8 Complete

- All Records Including Verified
- Verified Records Only



<u>Discrepancy Report</u>

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.



<u>Original Baseline File – discrepancies only / Original Secondary File – discrepancies only</u>

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.

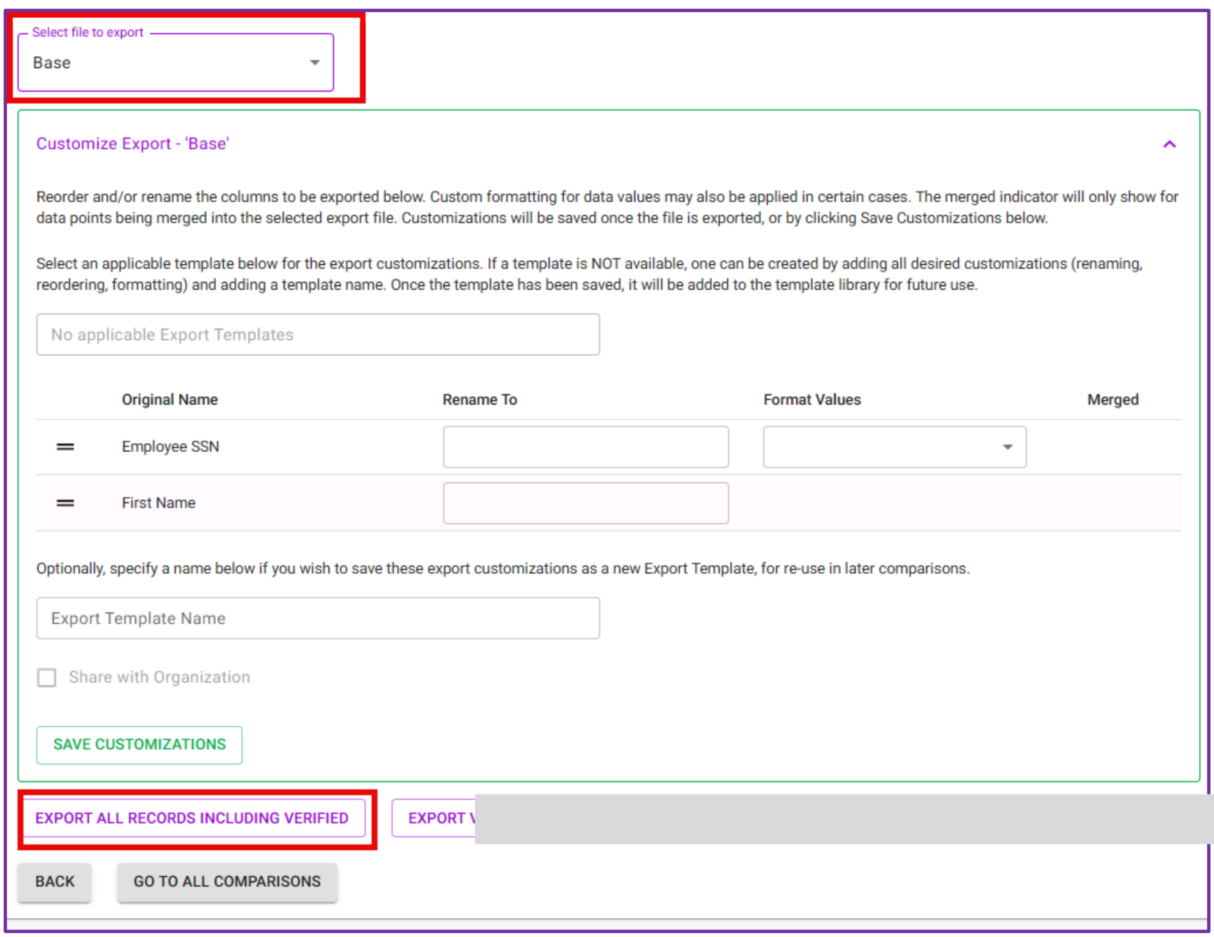
Original Baseline File / Original Secondary File

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

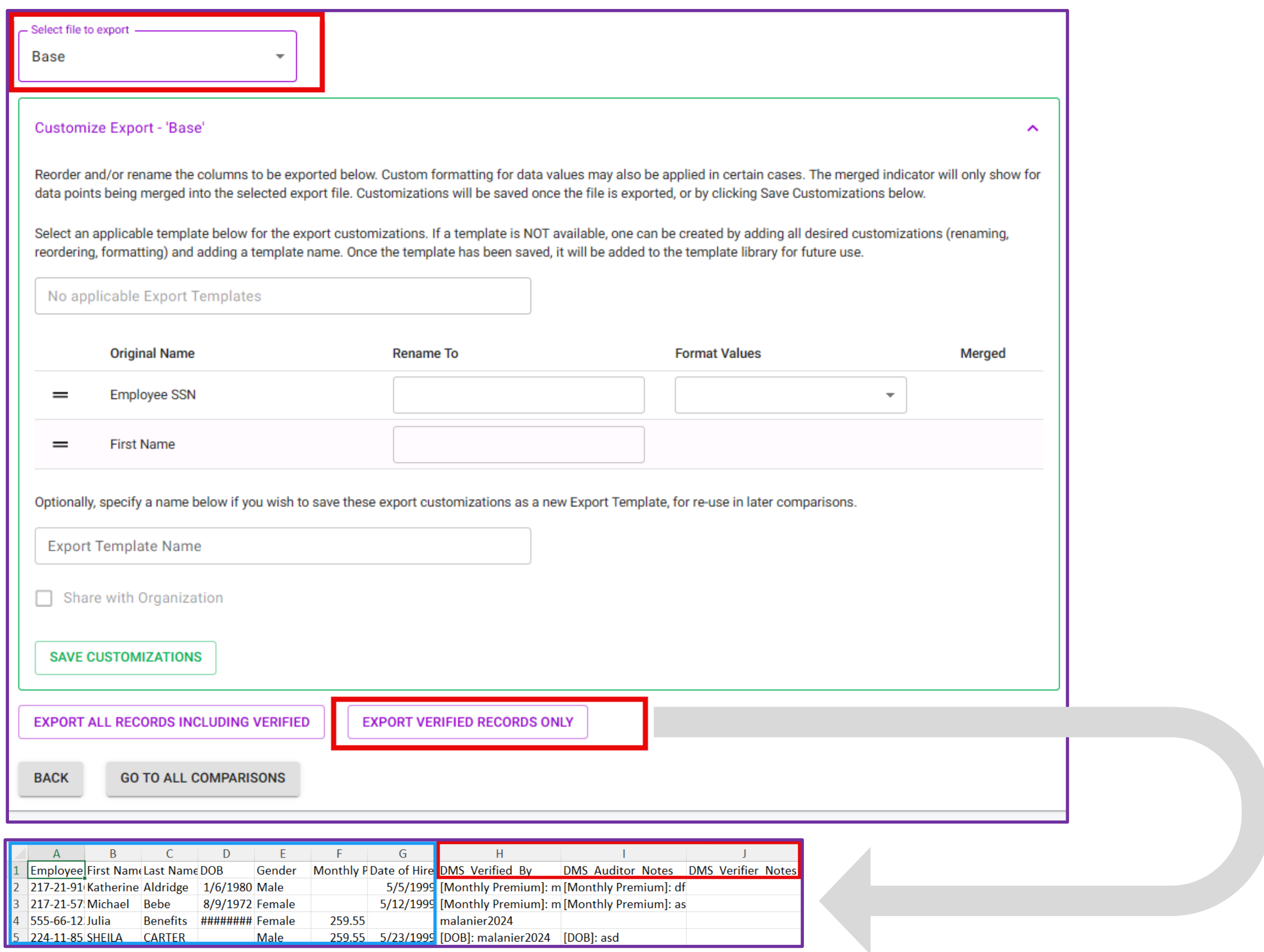


	D	E	F	G	H	I	J	K
1	DOB	Gender	Monthly Premium	Date of Hire	DMS_Verified_By	DMS_Auditor_Notes	DMS_Verifier_Notes	DMS_Ignored_Discrepancies
2	2/18/1989	Male	259.55	5/1/2024				
3	1/3/1975	Female	259.55	5/4/1999				
4	1/6/1980	Male		5/5/1999	[Monthly Premium]: malanier2024	[Monthly Premium]: dfasdfas		

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

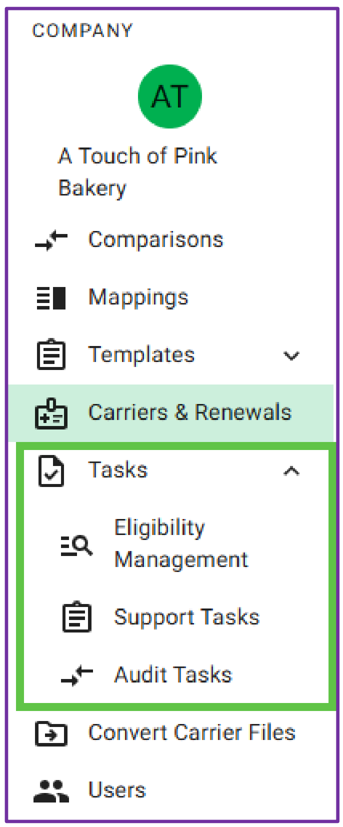


	A	B	C	D	E	F	G	H	I	J
1	Employee	First Name	Last Name	DOB	Gender	Monthly P	Date of Hire	DMS_Verified_By	DMS_Auditor_Notes	DMS_Verifier_Notes
2	217-21-91	Katherine	Aldridge	1/6/1980	Male		5/5/1999	[Monthly Premium]: m	[Monthly Premium]: df	
3	217-21-57	Michael	Bebe	8/9/1972	Female		5/12/1999	[Monthly Premium]: m	[Monthly Premium]: as	
4	555-66-12	Julia	Benefits	########	Female	259.55		malanier2024		
5	224-11-85	SHEILA	CARTER		Male	259.55	5/23/1999	[DOB]: malanier2024	[DOB]: asd	

Ignored Records will **<u>not</u>** 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 -REPORETING	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)]

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)]

Release Notes

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

[Release Notes Log - DMS Data Validate (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