

Verifier User Guide



Powered by

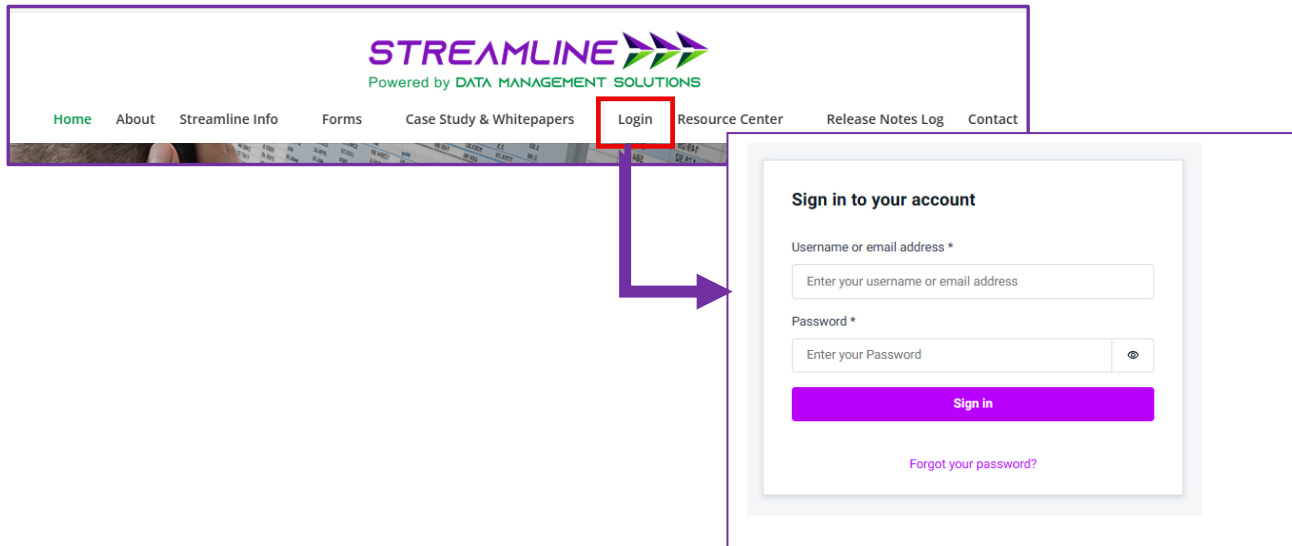
DATA MANAGEMENT SOLUTIONS

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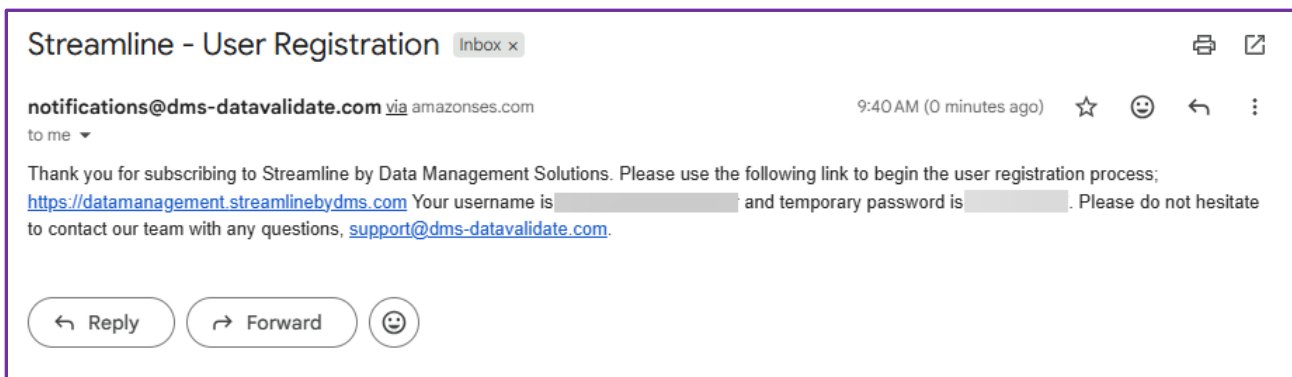
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Login

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



Registration Email Example:



Select Comparison

Select the comparison to verify

A Touch of Pink Bakery

Information EDIT

Company Name A Touch of Pink Bakery	Organization Name Broker B: Data Management Solutions
Comparisons Count 4	Users Count 0
Carriers Count 8	Active Yes
Primary Org Contact malanier2024 (Mary Lanier)	Primary Org Contact Email malanier2024@outlook.com
Primary Org Contact Phone 9193532492	Secondary Org Contact
GA Renewal Contact maryl (Mary Lanier)	GA Renewal Contact Email support@dms-datavalidate.com
Notes	Benefit Admin System Employee Navigator

Comparisons NEW

- Test
Map Data

- Demo Audit to Test GA Agent
Map Data

- Carrier to Payroll Audit for June 2025
Complete

- Merge Payroll and Carrier Files
Complete

Verify Discrepancies

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

Verify Discrepancies

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

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

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

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

Verifier Details

First name	Last name	Relationship	'base' row / data point	'second' row / data point	Verified Value (Baseline value appears first)	Last Verified By	Discrepancy Type / Notes
Katherine	Aldridge		4 / Monthly Premium	4 / Monthly Premium	<input type="radio"/> 654.98 <input type="radio"/> 259.55 <input type="radio"/> Overwrite <input type="radio"/> Ignore	-	<p>Discrepancy Type</p> <div style="border: 1px solid gray; height: 20px; width: 100%;"></div> <p>Auditor notes</p> <div style="border: 1px solid gray; padding: 2px;">Premium not the same in carrier as the Ben Admin system.</div> <p>Verifier notes</p> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div>

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

Verify Discrepancies

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

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

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

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

Verifier Details

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

Katherine Aldridge 4 / Monthly Premium 4 / Monthly Premium Ignore

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

Rows per page: 5 1-2 of 2

Verifier Memo

BACK NEXT OVERRIDE AS COMPLETE

Verifier Memo

Verifier Memo

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

Verify Missing

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

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

Verify Discrepancies

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

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

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

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

Verifier Details

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

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

Rows per page: 5 1-2 of 2

Verifier Memo

BACK NEXT OVERRIDE AS COMPLETE

Verifier Memo

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

Complete the Compare

Data verification is complete.

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

Hello {Auditor First Name},

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

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

{Verifier Memo}

Thank you,

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

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

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

Complete

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

Comparison Details

Select file to export

BACK GO TO ALL COMPARISONS

-- Select --

Base

Secondary

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

Select file to export
Base

Customize Export - 'Base'

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

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

No applicable Export Templates

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

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

Export Template Name

Share with Organization

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED EXPORT VERIFIED RECORDS ONLY

BACK GO TO ALL COMPARISONS

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

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

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

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED EXPORT VERIFIED RECORDS ONLY

BACK GO TO ALL COMPARISONS

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:

Select file to export
Base

Customize Export - 'Base'

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

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

No applicable Export Templates

Saving New Export Template:

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

Export Template Name
Export Template

Share with Organization

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED

EXPORT VERIFIED RECORDS ONLY

BACK

GO TO ALL COMPARISONS

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

Questions: Contact Support@dms-datavalidate.com

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 but can be shared with the organization. To access the library, click on TEMPLATES under the company menu and then select the type of template.

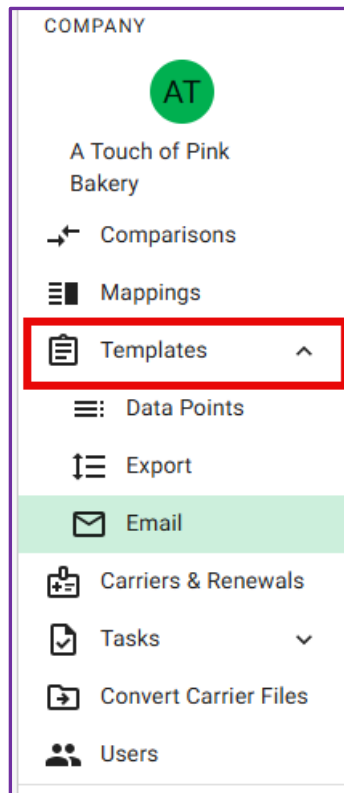
PLEASE NOTE: Any data point and export template shared with an organization and created by an organization administrator, or an organization compare user can be utilized under any company within that specific organization. Company admins which are available under our Platinum Elite subscription will only have access to the templates that are created under their specific company.

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

✓ Create — ✓ Import Data — ✓ Select Data Points — ✓ Map Data — 5 Compare — 6 Verify Discrepancies — 7 Verify Missing Data — 8 Complete

View Reports

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

Select file to download

Comparison Details

Discrepancy Counts by Data Point Missing Counts

The second set of reports are available on Step 8 Complete

- All Records Including Verified
- Verified Records Only

✓ Create — ✓ Import Data — ✓ Select Data Points — ✓ Map Data — ✓ Compare — ✓ Verify Discrepancies — ✓ Verify Missing Data — 8 Complete

Complete

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

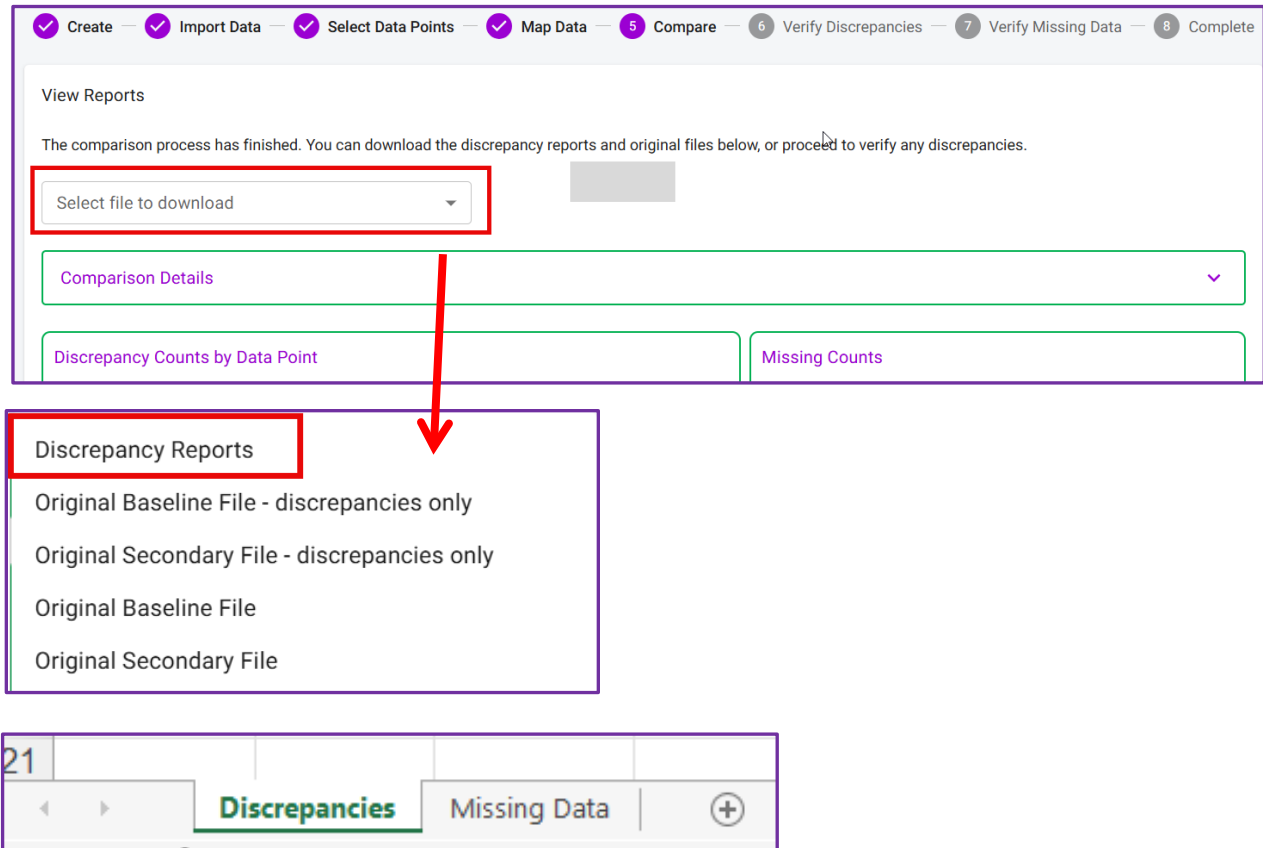
Comparison Details

Select file to export

BACK GO TO ALL COMPARISONS

Discrepancy Report

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



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

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

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

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

Original Baseline File / Original Secondary File

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

All Records Including Verified

This is a downloadable report located in Step 8 - Complete that contains all records from either the baseline or secondary file including the verified records (discrepancies and missing).

The *All Records Including Verified* report also includes 5 additional columns added to the original files:

- DMS_Verified_By
- DMS_Auditor_Notes
- DMS_Verifier_Notes
- DMS_Discrepancy_Type
- DMS_Ignored_Discrepancies

Select file to export
 Base

Customize Export - 'Base'

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

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

No applicable Export Templates

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

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

Export Template Name

 Share with Organization

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED

EXPORT V

BACK
GO TO ALL COMPARISONS

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

Verified Records only

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

- DMS_Verified_By
- DMS_Auditor_Notes
- DMS_Verifier_Notes
- DMS_Discrepancy_Type

- Select file to export -
 Base

Customize Export - 'Base'

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

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

No applicable Export Templates

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

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

Export Template Name

Share with Organization

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED

EXPORT VERIFIED RECORDS ONLY

BACK

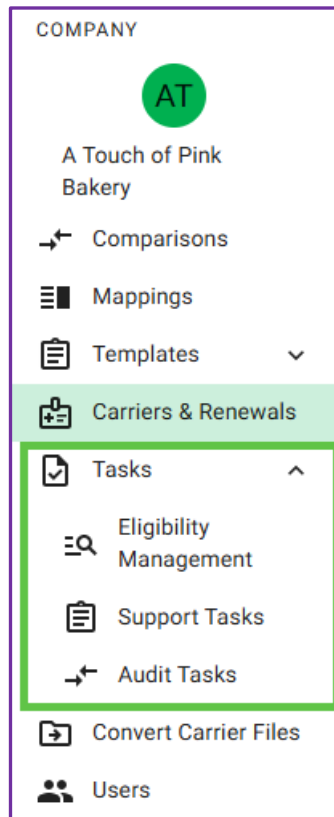
GO TO ALL COMPARISONS

	A	B	C	D	E	F	G	H	I	J
1	Employee	First Nam	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 not show in the *Verified Records only* report.

Company Reports

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



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

Eligibility Management Tasks NEW

FILTERS EXPORT

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

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

Support Tasks NEW

FILTERS EXPORT


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

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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

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Key Words

The application 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 Streamline application provides a knowledge base for frequently asked questions.

[Streamline Knowledge Base | Streamline by DMS](#)

Benefit Systems



The Streamline application provides instructional videos for various carrier files for enrollments and invoices.

[Streamline Data Frequently Used Systems | Streamline by DMS](#)

Release Notes



The Streamline application release notes are available through our website for reference.

[Release Notes Log | Streamline by DMS](#)