

Release Update – March 24th

Streamline (Data Management Solutions) is pleased to announce this week's enhancements and fixes to our application. Each enhancement/fix is separated by Applicable Users (subscribers who are directly affected by the enhancement or the fix) for easier viewing.

New + Improved

Applicable users: All Users

Unum Conversion

We have added support for Unum row-based invoices within the Carrier File Conversion module. The converted output is a column-based report that includes aggregated totals for key benefits, including Group Life, Group AD&D, Voluntary Life, and Voluntary AD&D.

This enhancement is designed to support benefits administration systems where coverages may be bundled or split by member (e.g., Critical Illness). For Employee Navigator (EN) users, the output closely aligns with the *Carrier Billing Employees by Plan* report format.

This update reduces the need for manual data manipulation, improving efficiency and minimizing the risk of errors.

Condensed View

All INFO cards have been updated to display only fields that contain values. Fields without values are now hidden from view but remain accessible in edit mode for users with the appropriate permissions.

This enhancement streamlines the interface by highlighting relevant data, improving readability, and enhancing the overall user experience.

Demo Organization and Company Designation

A new Demo checkbox has been added to both the organization and company levels to identify demo sites. When selected, these records will be excluded from exportable reports, including tasks and renewals.

This enhancement improves reporting accuracy by automatically filtering out demo data, eliminating the need for users to manually determine whether records are for demo purposes.

Additional Carriers Added

We have added new carriers to the platform, including Reliance and Solstice, expanding available carrier options for users.

Update Companies Table

The Companies table now defaults to displaying only active companies, eliminating the need to manually apply a filter. Inactive companies remain accessible by removing the pre-set filter. New columns have also been made visible to indicate active and demo status.

Applicable users: *Organization and Agency Users*

Upload File Name Character Limit Increase

The file name character limit has been increased from 80 to 100 characters, allowing for more descriptive file names. This update applies to all Upload File functionality across the BenOps solution areas.

Renewal Month Dropdown Update

An “N/A” option has been added to the Renewal Month dropdown within the carrier setup. This accommodates carriers or benefits, such as COBRA, that do not follow traditional renewal cycles like medical or dental plans.

Updated Branding Reference

References to Broker Builder Solutions (BBS) have been removed and replaced with more generic language for Broker Managed in the Renewal Wizard. This update ensures the platform can be more broadly utilized by agencies where Broker Builder Solutions is not a connected agency.

This change standardizes terminology across the application, creating a more neutral and adaptable experience for all users. It also supports multi-agency environments by removing system-specific references that may not apply universally, reducing confusion and improving overall usability.

By aligning the platform with more flexible branding, agencies can better tailor the system to their own identity while maintaining consistency across workflows, communications, and reporting.

Enhanced Benefit Mapping for Carrier Plan Imports

Additional benefit mapping has been added to the carrier plan import functionality to support variations in benefit naming. For example, “Parking Reimbursement” will now map to “Parking.”

This enhancement improves the system’s ability to recognize and standardize similar benefit types across different benefit administration systems, even when naming conventions differ. By automatically aligning these variations to a consistent set of benefit names, the platform reduces the need for manual intervention during the import process.

As a result, users can expect more accurate plan mapping, fewer import errors, and increased efficiency when onboarding or updating carrier data. This also supports better downstream reporting and consistency across workflows by ensuring benefits are categorized uniformly regardless of how they are labeled by the carrier.

Applicable users: *Agency Users*

Additional Support Email Field

A new support email field has been added to the Agency detail page, providing a centralized location to manage task-related communications. This email address is used for Issue Eligibility Management Tasks, Support Tasks, and Audit Tasks when they are created at the Organization level.

When any of these tasks are initiated, the system automatically sends a notification to the designated support email address, ensuring the appropriate team is immediately informed. This helps streamline communication, reduces the risk of missed requests, and improves response times.

By allowing agencies to define a default support contact, this enhancement supports better workflow management and accountability, especially in shared inbox environments or when multiple team members are responsible for handling incoming tasks.

Agency-Level Email Customization

Email customization has been enhanced to support Agency-level templates. Agencies can now create custom email templates for the following notifications:

1. Audit Task Assignment (New task module)
2. Comparison to Auditor (Existing)
3. Comparison to Verifier (Existing)
4. Eligibility Management Task Assignment
5. Eligibility Management Task Assignment – Error Report
6. Renewal Task Assignment
7. Renewal Task Broker Managed
8. Renewal Task Complete
9. Renewal Task Kickoff
10. Renewal Task Kickoff Follow Up
11. Support Task Assignment (New task module)

These templates are also available at the Organization and Company levels, with the following priority order:

- 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

This enhancement enables flexible, multi-level customization to better align communications with organizational needs.

Service Type Functionality for Agencies:

Service Type functionality has been added at the Agency level, providing greater flexibility in how services are defined and managed across organizations. Agencies can now create custom service types for each Organization by assigning a unique name and selecting from a predefined list of service categories.

These service types can be reused across multiple organizations, while maintaining a unique name within each individual organization to prevent duplication or confusion. This allows agencies to standardize service categories while still tailoring naming conventions to fit each client's needs.

Service types can be leveraged to better organize workflows, reporting, and task management, making it easier to track services provided, align internal processes, and ensure consistency across teams. This enhancement improves overall visibility, organization, and scalability of service management within the platform.

Support Task Module:

A new Support Task module has been introduced to provide a structured way to manage requests that fall outside of Eligibility Management Tasks. This allows both Organization and Agency users to create support tasks for a selected Company, with optional Carrier and Carrier Plan selection, and a defined Task Type (Plan Build, Broker Support, HR Support, ACA, Compliance, Reporting, or Other).

This module is designed to capture and track items that are not part of recurring enrollment processing, open enrollment processing, error reports, or issue workflows, ensuring better organization and visibility of support-related activities.

Organization users with Admin, Comparer, or Task access can create Support Tasks to log non enrollment-related issues. At the Organization level, users are limited to selecting the task type and cannot assign the task. Instead, the task is automatically routed to the Agency's designated support email, as defined on the Agency Detail page.

Once created, Support Tasks can be reassigned by Agency users as needed, allowing for proper task routing and ownership. This enhancement improves task tracking, accountability, and communication between organizations and agencies while centralizing support-related requests within the platform.

Examples of Support Tasks include submitting an ACA-related question or reporting an incorrect plan build, providing a clear path for resolving issues that require agency support.

Audit Task Module:

A new Audit Task module has been added, allowing users to create audit tasks with the ability to upload up to three files to support the audit process. Once the task is created, the system automatically generates the associated comparison for the assigned user, streamlining audit setup and reducing manual steps.

When an audit task is created by an Organization user, the assignee will default to the designated Agency Support Email. Agency users can then reassign the task as needed to ensure proper ownership and workflow management.

Upon completion of the comparison, Agency users can close the Audit Task directly from within the audit. This eliminates the need to manually close both the audit task and the comparison separately, improving efficiency and simplifying the overall audit workflow.

Eligibility Management Tasks – Issue Type Enhancement

A new task type, **Issues**, has been added to the existing Eligibility Management Task module and is available to both Organization and Agency users. This enhancement introduces additional issue categories, including File Transmission Issue, File Structure Update, File Transmission Confirmation, File Mapping Issue, File Mapping Supplement, and Other.

This update is designed to more effectively capture, track, and manage issues related to existing file processes, such as Proprietary, EDI, and Data Exchange files. It provides a structured way to log and monitor file-related concerns that occur during ongoing operations.

This new task type is available to Organization users with Admin, Compare, or Task access. When created by an Organization user, the task is automatically routed to the designated Agency-level support email referenced earlier, ensuring prompt visibility and response by the appropriate team.

Examples of use include requesting new mapping for an 834 EDI file or reporting a file transmission failure to a carrier, helping ensure issues are quickly identified and resolved.

By incorporating these issue types directly into the Eligibility Management module, users can centralize communication, documentation, and resolution efforts within a single workflow. This reduces the need for external tracking methods, improves visibility across teams, and ensures that file-related issues are properly documented and addressed in a timely manner.

Additionally, this enhancement supports better accountability and auditability by maintaining a clear history of issues, updates, and resolutions tied to specific files and processes. It ultimately streamlines troubleshooting, enhances collaboration between Organization and Agency users, and improves overall efficiency in managing file-related exceptions.

Fixes

Applicable users: *Organization and Company Users*

Profile Navigation Fix

We have corrected an issue where the left-side menu items would become greyed out after a user accessed their profile. This fix ensures consistent navigation and usability throughout the application.



Reminder: Carrier, Carrier Plans, and ALL associated modules Availability

Please note that Carriers and Carrier Plans as well as our new Renewal and Eligibility Management Tracking Modules are only available to organizations on Streamline BenOps.

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