Agency User Guide

STREAMLINE

Powered by

DATA MANAGEMENT SOLUTIONS

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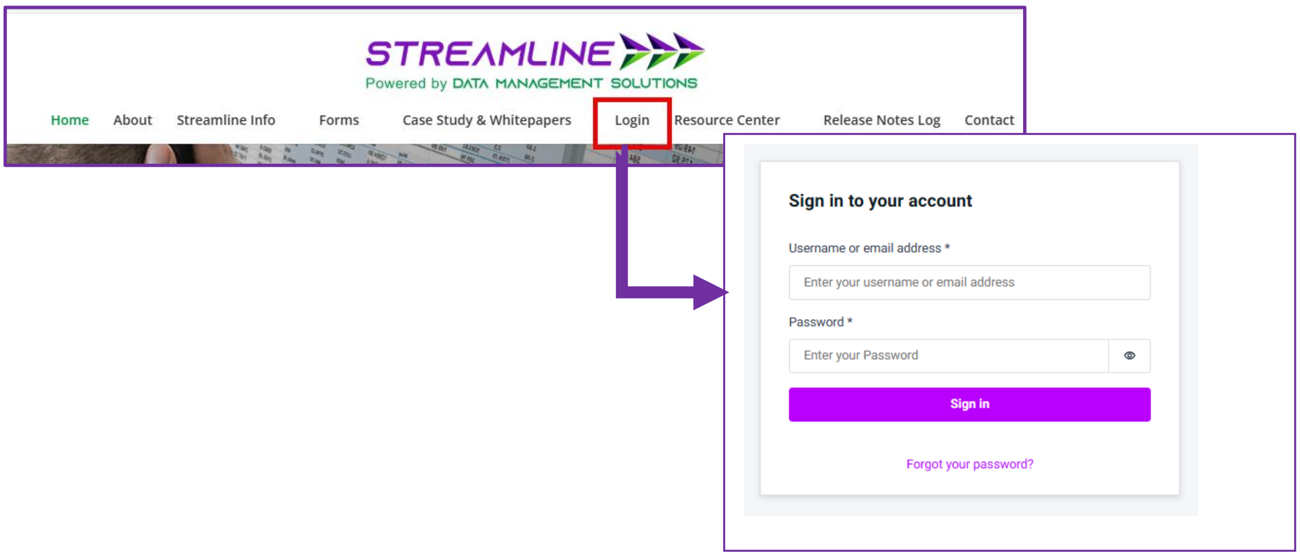
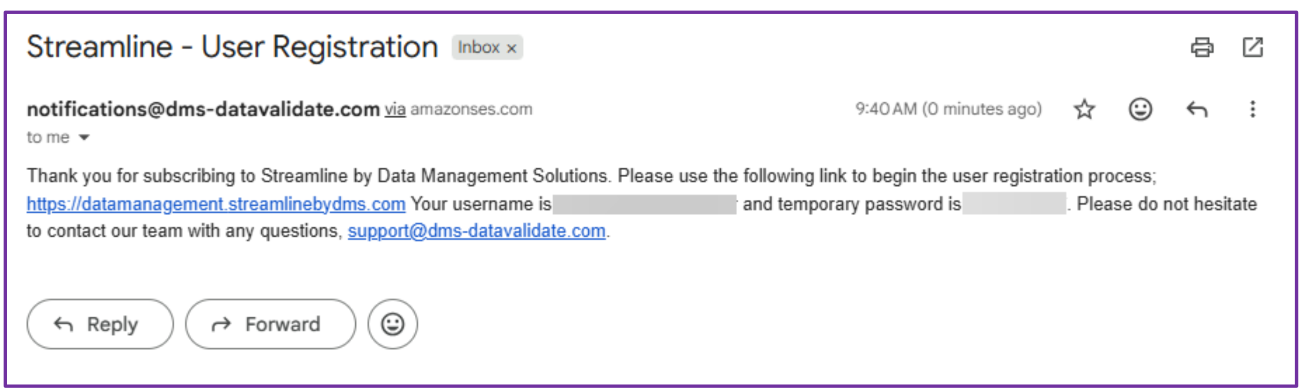
Login

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



Registration Email Example:



Users

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

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

2. **Agency Task Comparer** – **Limited Access**
   Allows full compare and merge functionality, but only for designated (whitelisted) organizations. This role has access to the Eligibility Management Tracking Module but with view only access to the Renewals and Carriers.

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

3. **Organization Admin – Full Access**
   Provides complete access to all features within the application, including the ability to add and deactivate users.

4. **Organization Comparer – Limited Access**
   Allows full compare and merge functionality, but only for designated (whitelisted) companies. This role does not have the ability to add new companies.

5. **Organization Task Manager – Limited Access**
   Grants the same permissions as the Organization-Level Comparer, excluding access to compare and merge functions.

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

6. **Organization Verifier – Partial Access**
   Permits verification of discrepancies and missing data for existing compares. Compare and merge functionality is not available for this role.

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

7. **Company-Level Admin – Limited Access** *(Platinum Elite Plan only)*
   Offers full compare and merge capabilities, but only for the specific company under which the user is created. This role is exclusive to the Platinum Elite subscription.

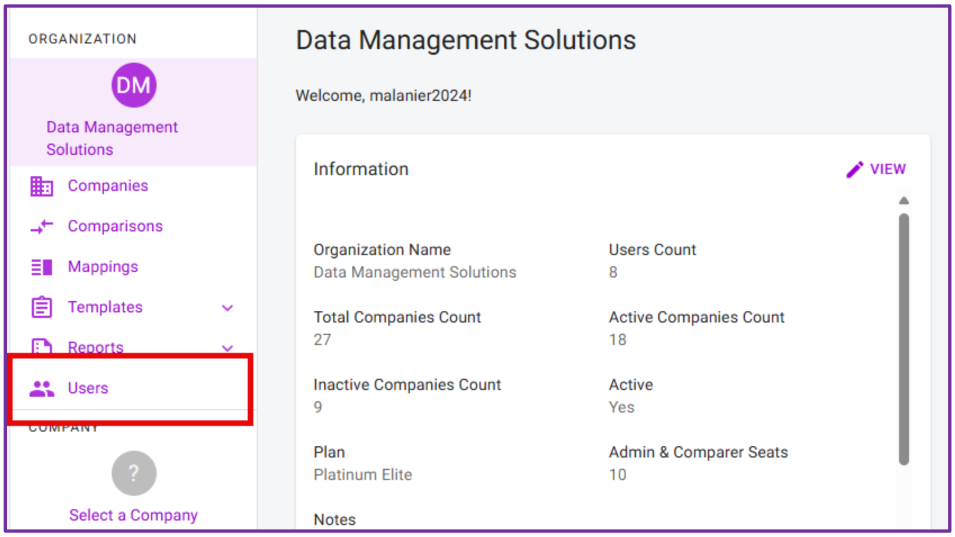
8. **Company-Level Verifier – Partial Access**
   Allows verification of discrepancies and missing data for existing compares within a single company. This role does not include compare and merge functionality.

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

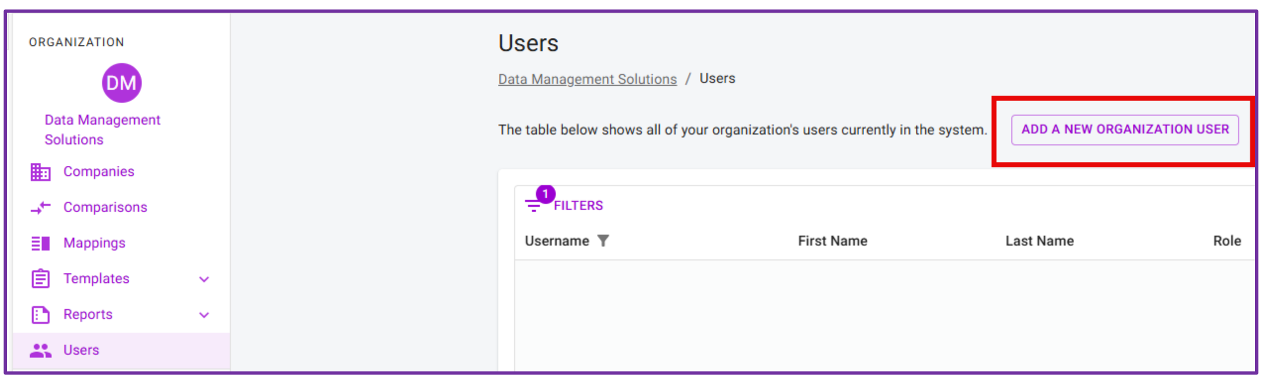
Only Agency level users are discussed in this set of instructions. Please reference the Organization and Company Level User process documents for information pertaining to those levels.

Adding an Organization Admin user

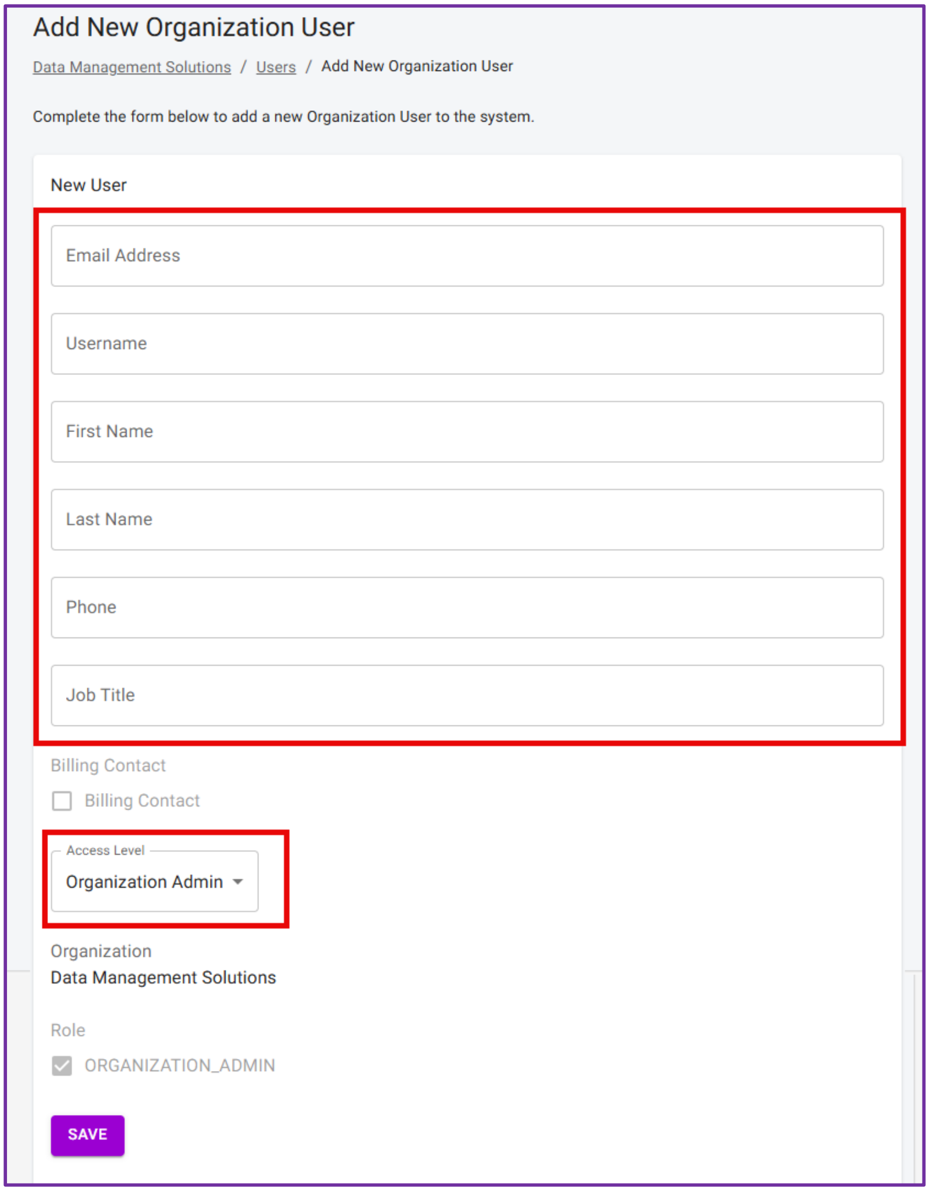
Select USERS under the desired organization.



Select ADD A NEW ORGANIZATION USER.



Enter all applicable information (Email, Username, First Name, Last Name, Phone, Job Title) for the newly created user. Please note that the email address and username CAN NOT be changed once saved.



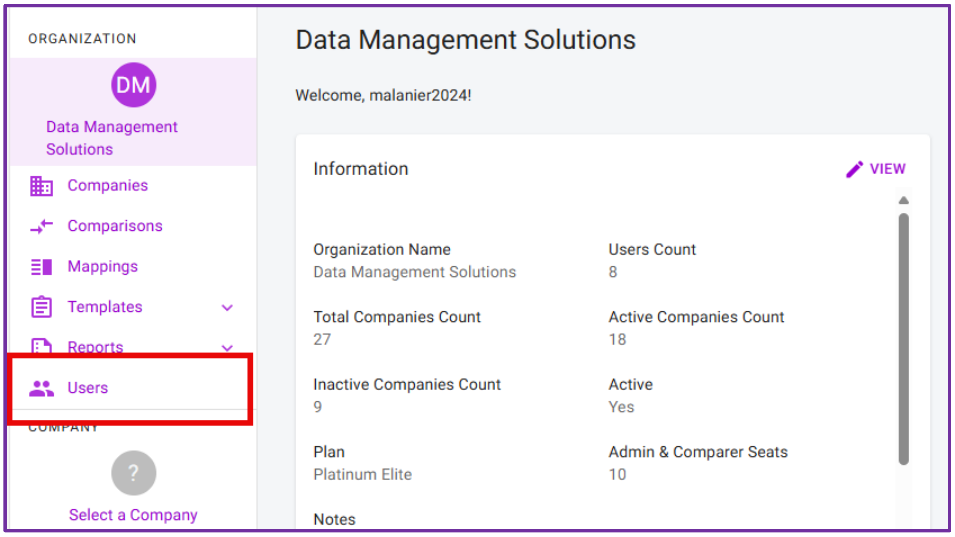
In the Access Level dropdown, select the user type: Organization Admin. This access level has full site functionality including adding and inactivating users.

Once all applicable information has been entered click Save. Whitelisted functionality is not available as the user has admin access.

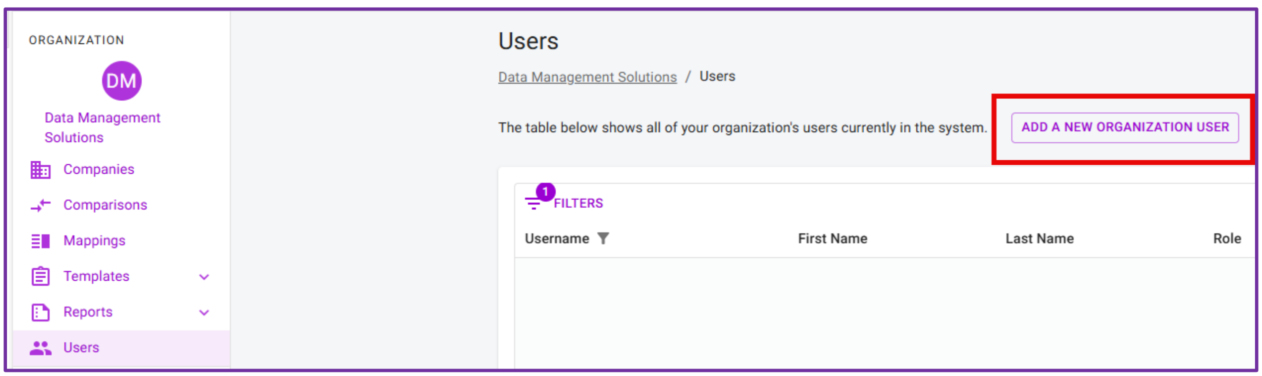
<u>The user will then receive an auto-generated email with a temporary password and a link to register their account.</u>

Adding an Organization Comparer user

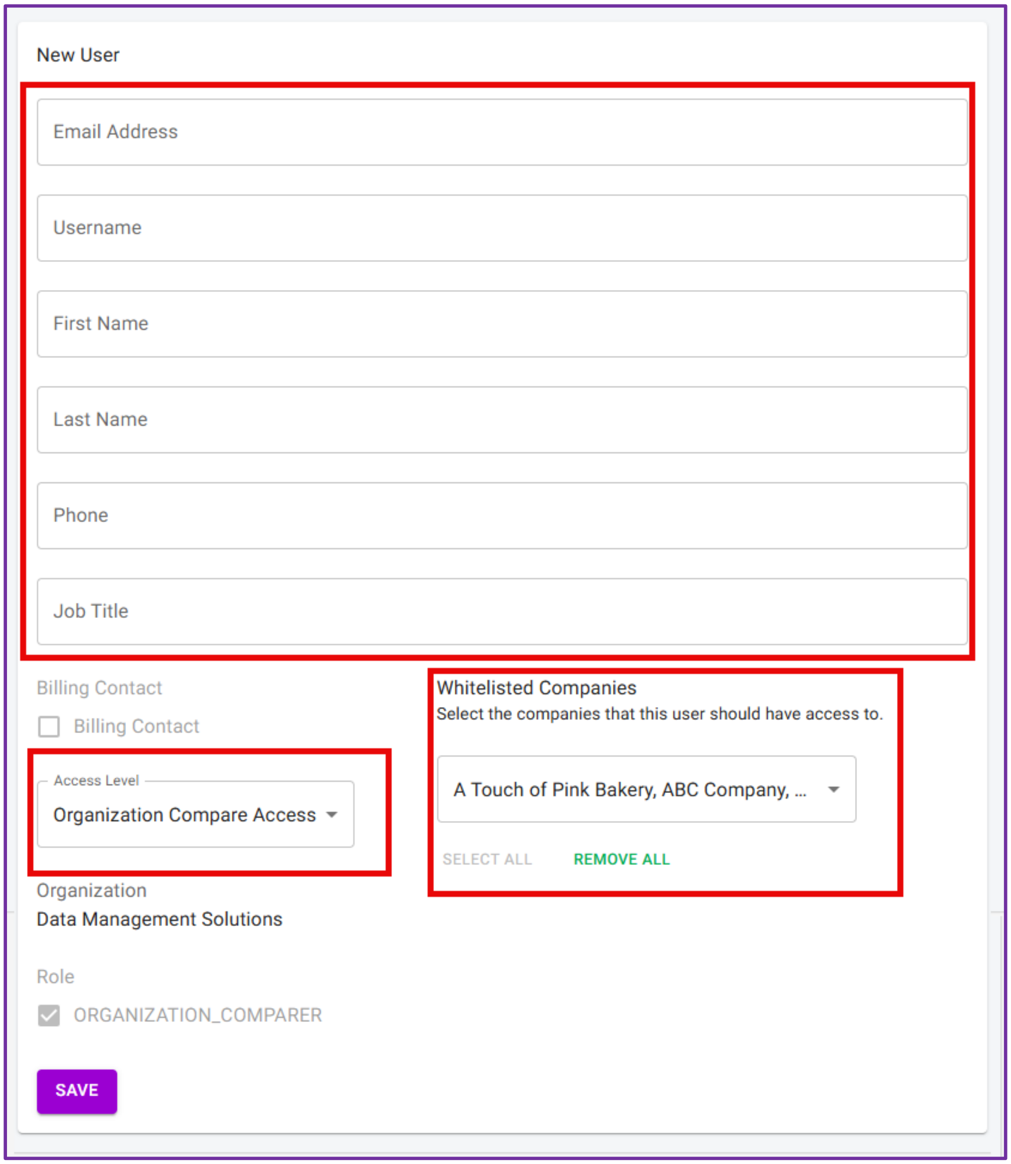
Select USERS under the desired organization.



Select ADD A NEW ORGANIZATION USER.

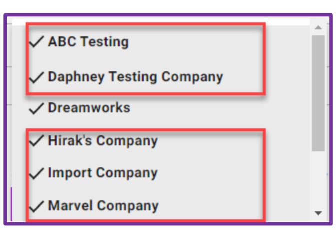


Enter all applicable information (Email, Username, First Name, Last Name, Phone, Job Title) for the newly created user. Please note that the email address and username CAN NOT be changed once saved.



In the Access Level dropdown, select the user type: Organization Compare Access. Organization Compare Access level has limited functionality. This level has full compare and merge functionality but only for whitelisted companies.

By default, this user will be whitelisted for all Companies under an Organization. Deselect all companies that the user should not have access to by selecting the dropdown and clicking the company.

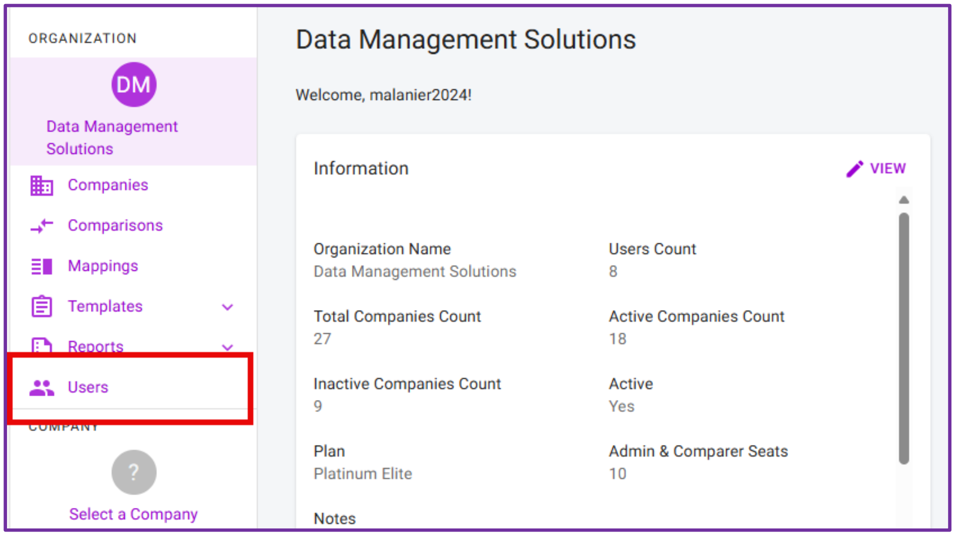


Once all applicable information has been entered and whitelisted companies selected/deselected, click Save.

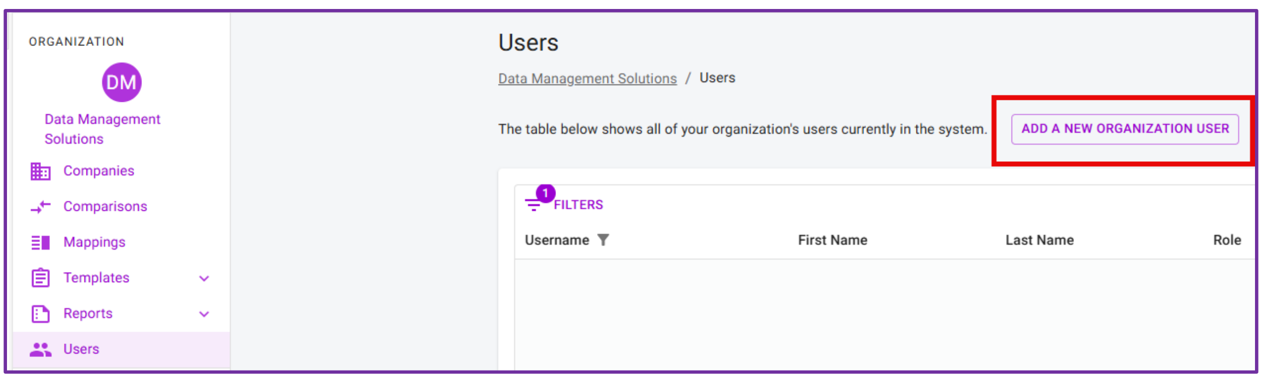
The user will then receive an auto-generated email with a temporary password and a link to register their account.

Adding an Organization Task Manager user

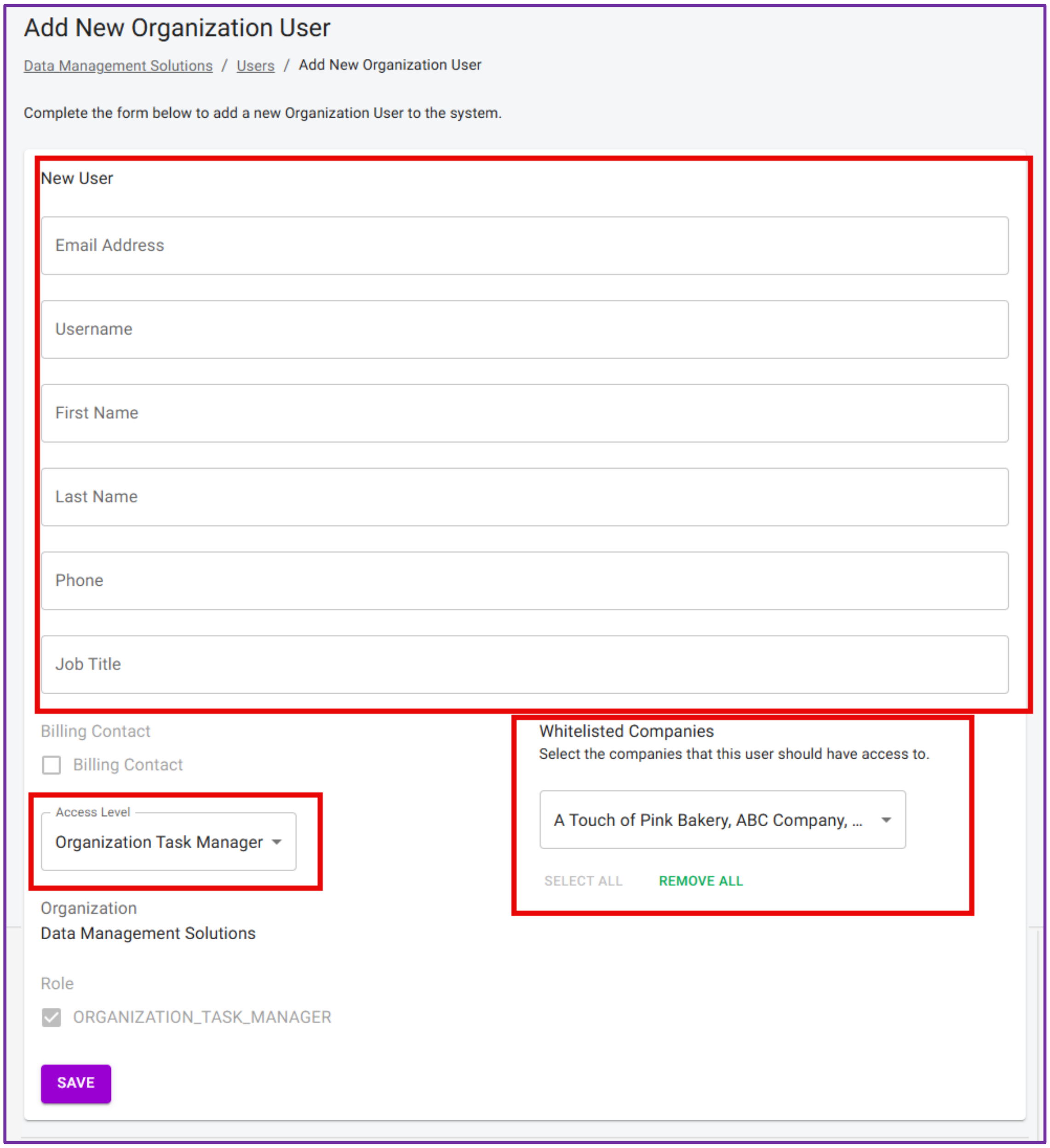
Select USERS under the desired organization.



Select ADD A NEW ORGANIZATION USER.

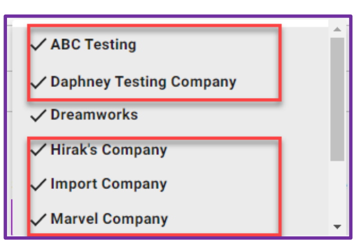


Enter all applicable information (Email, Username, First Name, Last Name, Phone, Job Title) for the newly created user. Please note that the email address and username CAN NOT be changed once saved.



In the Access Level dropdown, select the user type: Organization Task Manager. Organization Task Manager level has limited functionality. This level grants the same permissions as the Organization Comparer, excluding compare and merge functionality.

By default, this user will be whitelisted for all Companies under an Organization. Deselect all companies that the user should not have access to by selecting the dropdown and clicking the company.



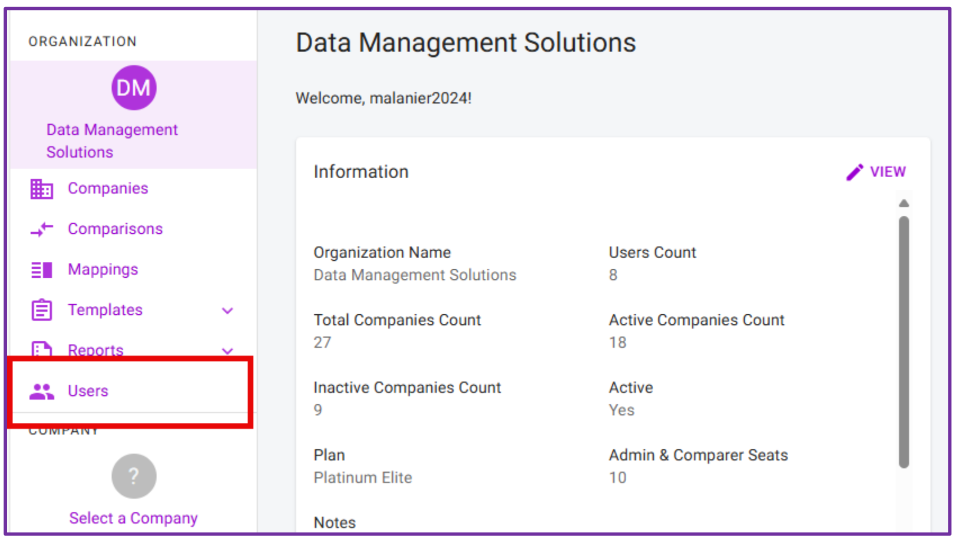
Once all applicable information has been entered and whitelisted companies selected/deselected, click Save.

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

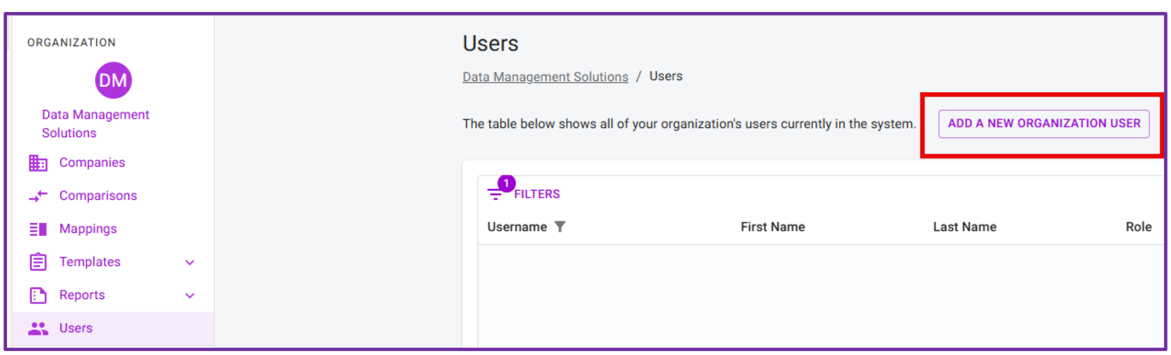
Note: This user type does not count against your licensed user seats. You may create an unlimited number of Task Managers.

Adding an Organization Verifier user

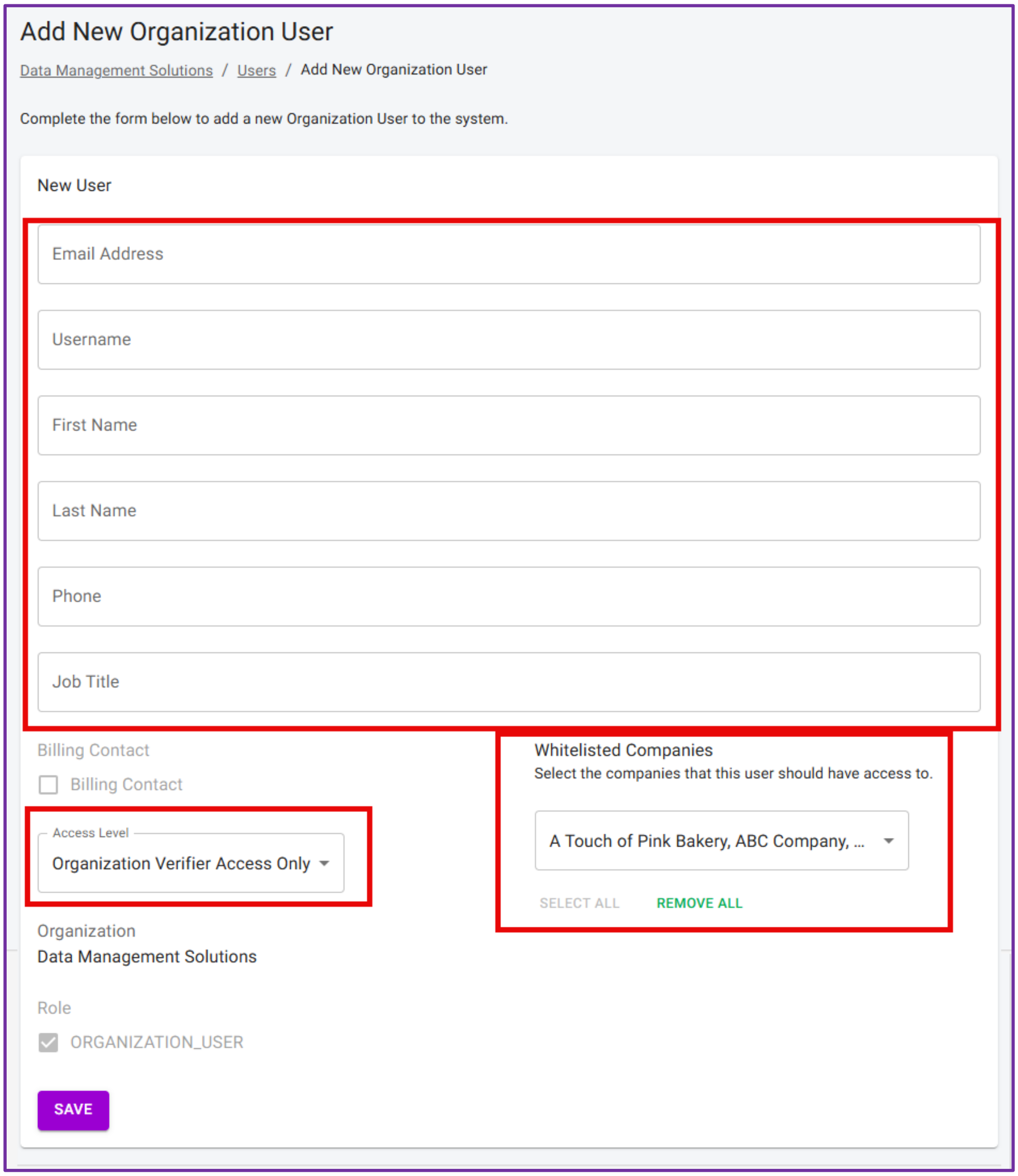
Select USERS under the desired organization.



Select ADD A NEW ORGANIZATION USER.

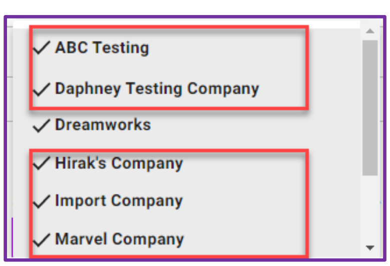


Enter all applicable information for the newly created user and check the VERIFIER ACCESS ONLY box.



In the Access Level dropdown, select the user type: Organization Verifier Access Only. Organization Verifier Access level has partial functionality. This level is limited to verifying discrepancies and missing data for existing compares only. No compare and merge functionality exists for this level.

By default, a Verifier user will be whitelisted for all Companies under an Organization. Deselect all companies that the user should not have access to by selecting the dropdown and clicking the company.



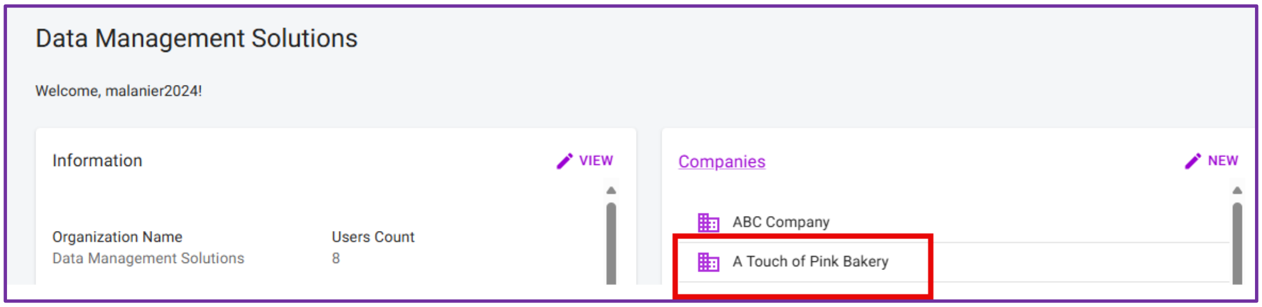
Once all applicable information has been entered and whitelisted companies selected/deselected, click Save.

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

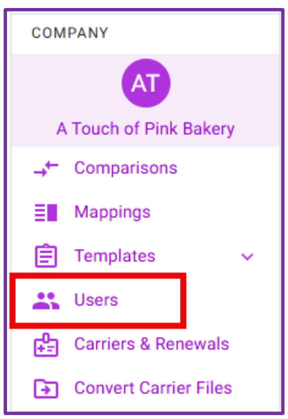
Note: This user type does not count against your licensed user seats. You may create an unlimited number of Organization Verifiers.

Adding a Company Admin user

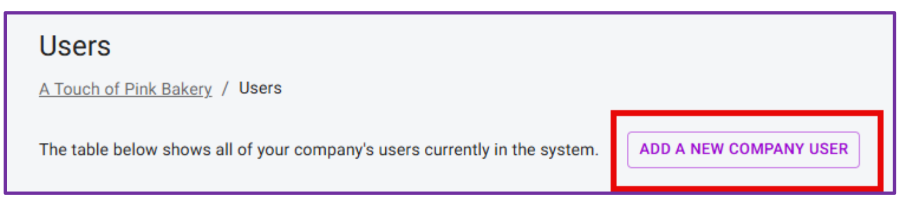
Select the Company where the new user will be added.



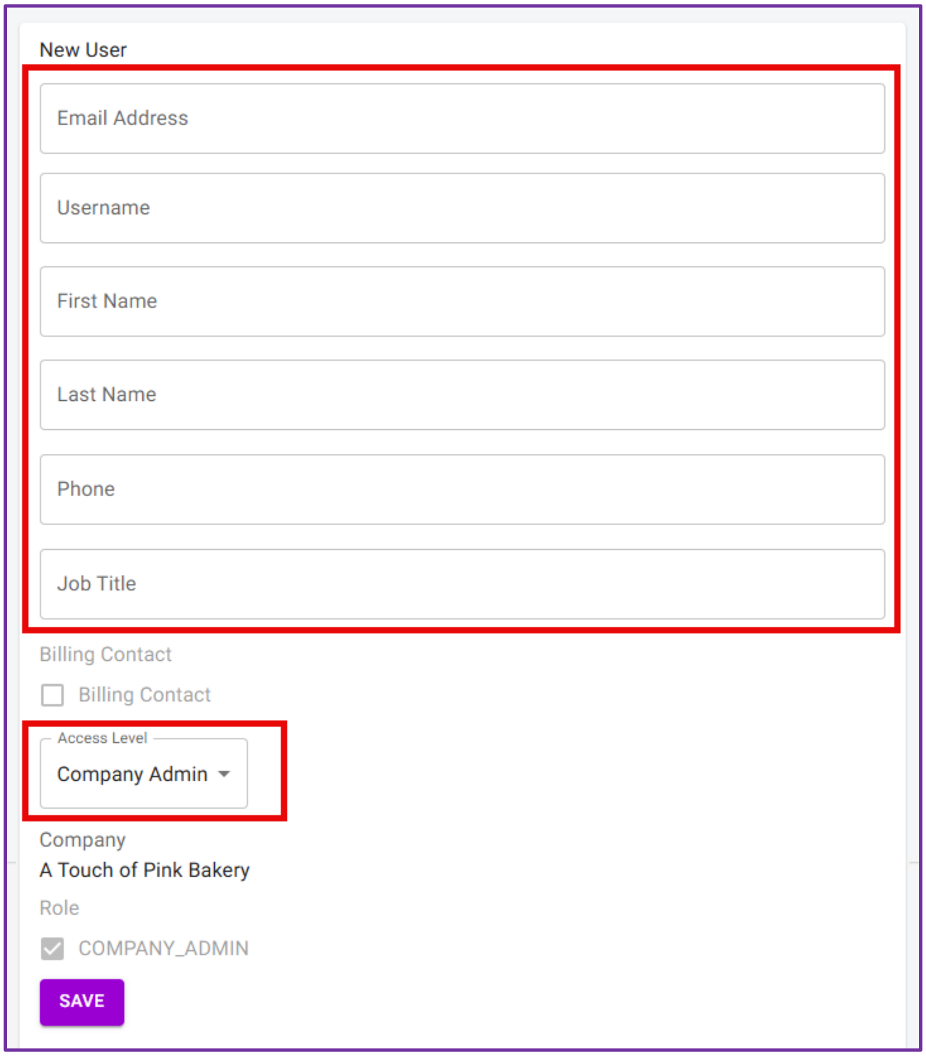
Click USERS under the desired company.



Click ADD A NEW COMPANY USER.



Enter all applicable information for the newly created user.



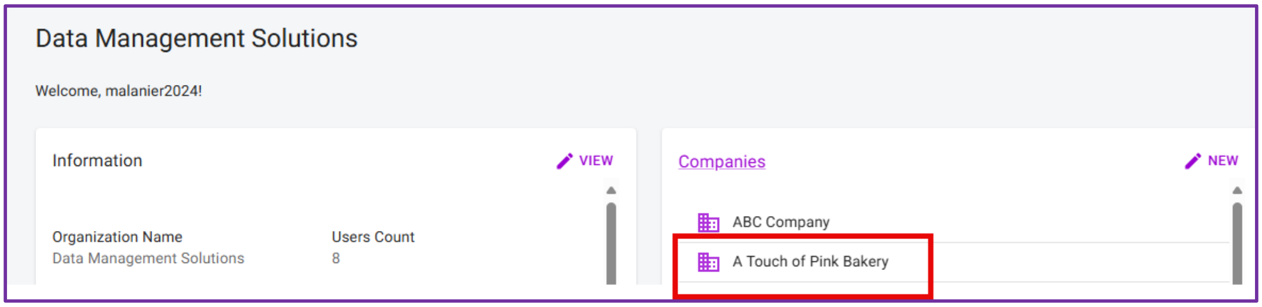
In the Access Level dropdown, select the user type: Company Admin. This access level has full compare and merge functionality for the specific company that the user was created under.

Once all applicable information has been entered click Save.

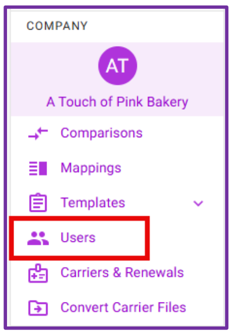
The user will then receive an auto-generated email with a temporary password and a link to register their account.

Adding a Company Verifier user

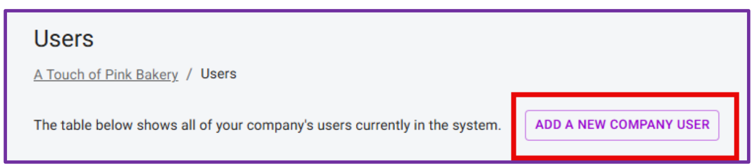
Select the Company where the new user will be added.



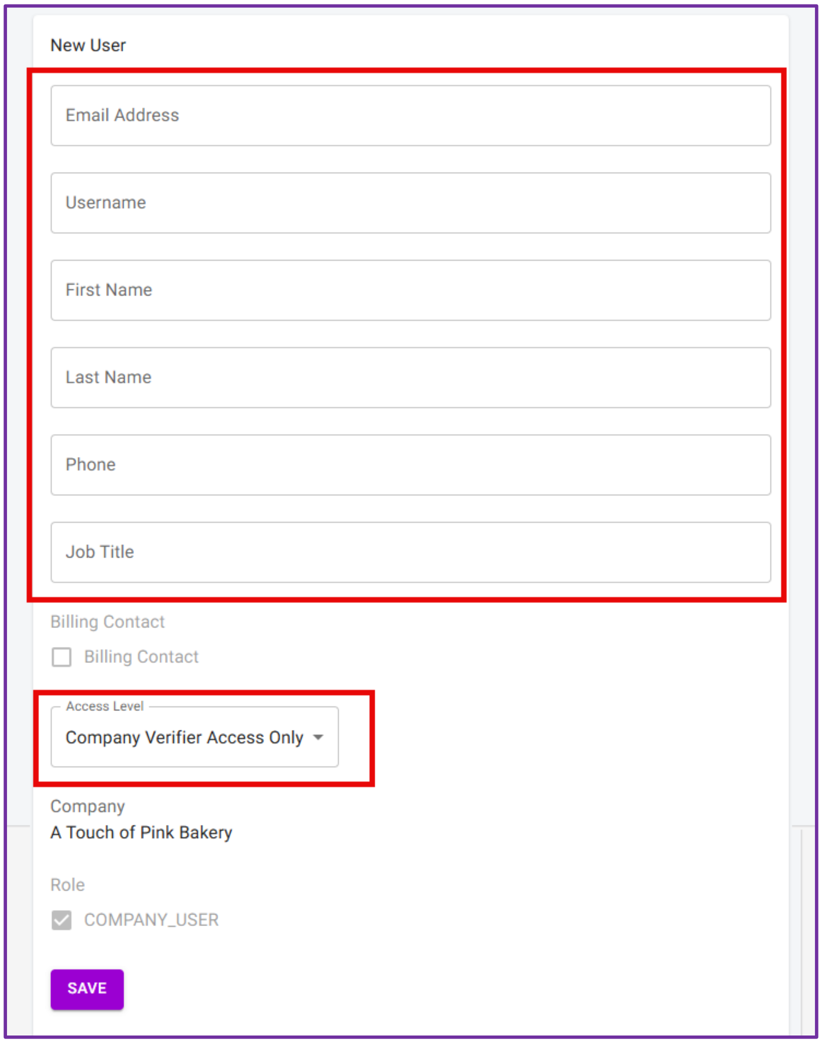
Click USERS under the desired company.



Click ADD A NEW COMPANY USER.



Enter all applicable information for the newly created user.



Once all applicable information has been entered click Save. Whitelisted functionality is not available as the user is limited to the company they were created under.

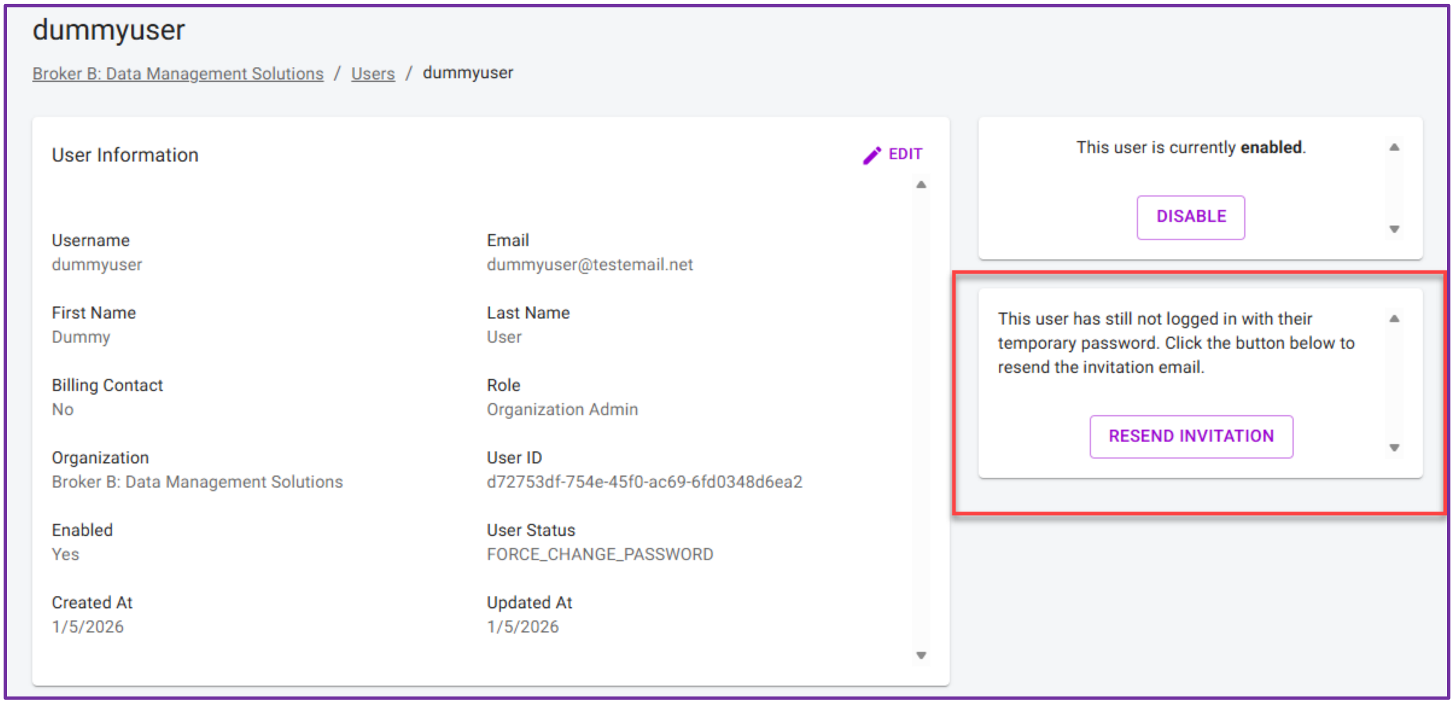
The user will then receive an auto-generated email with a temporary password and a link to register their account.

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

Resend User Registration

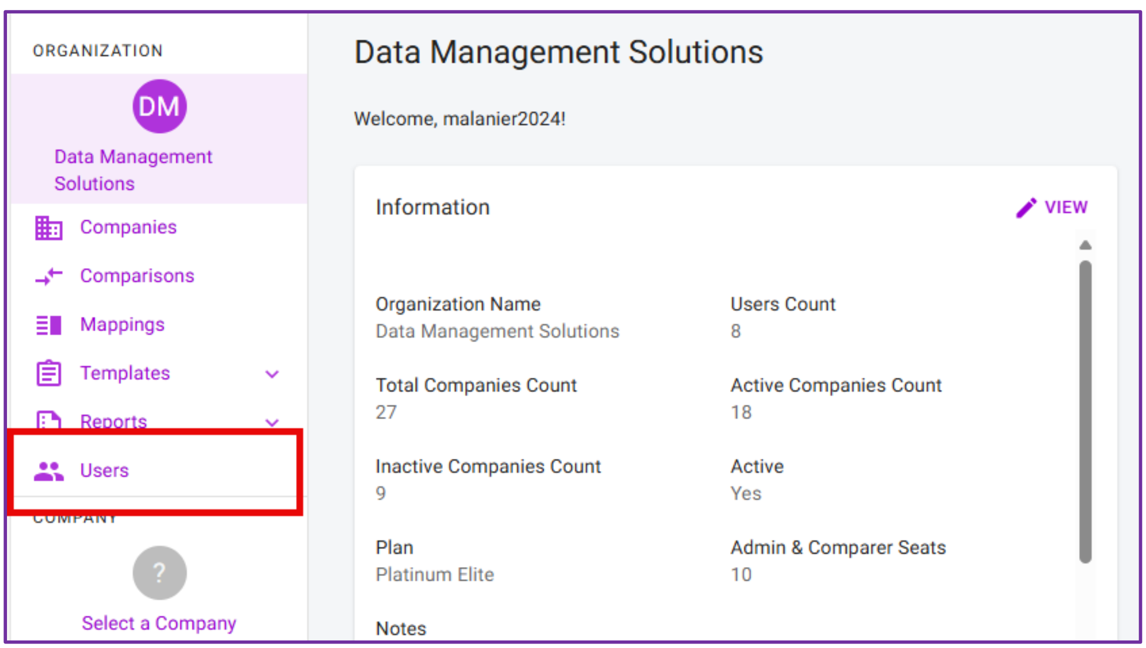
To resend a user registration invitation, locate the user in **Streamline** and click their username to open the **Edit User** screen. Then, click **Resend Invitation**.

The user will receive an automated email containing a temporary password and a link to complete their account registration.

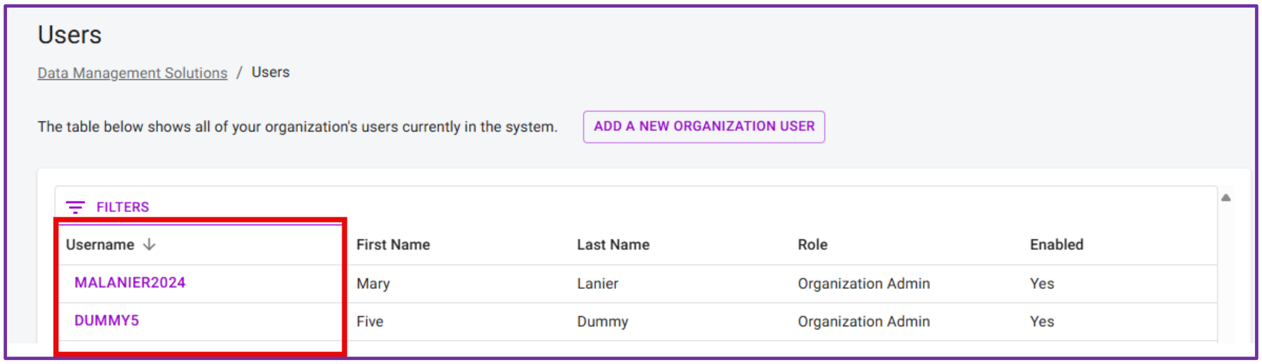


Inactivating / Reactivating a User

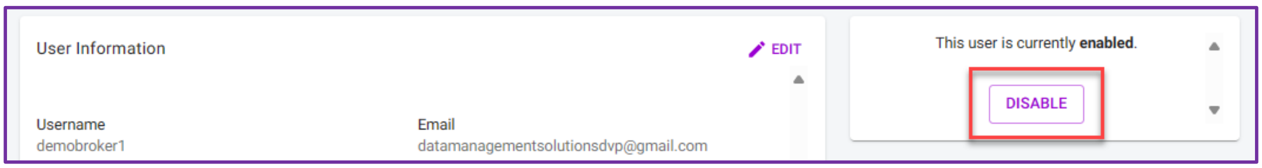
Select USERS under the organization.



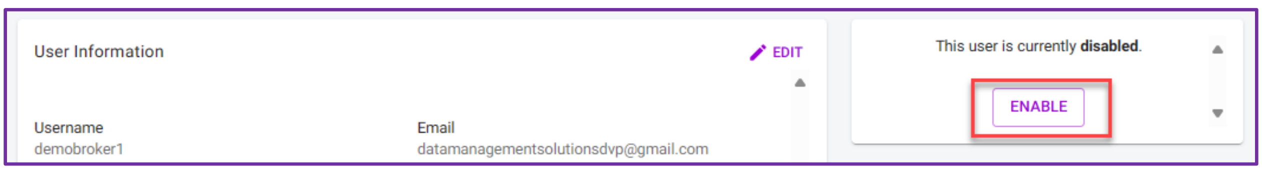
Select User to inactivate.



Click DISABLE in the user account. The button will change to ENABLE



To reverse the inactivation, click ENABLE.



Comparisons

All subscription plans include the **Streamline Data Solution**. This solution enables users to compare—or compare and merge—two Excel or CSV files, identifying discrepancies and missing records based on the fields selected during the audit process.

The Data Solution also includes a variety of audit reports, along with a **Comparison** table that displays all audits performed for each company within your organization. All reports can be downloaded for further review and analysis.

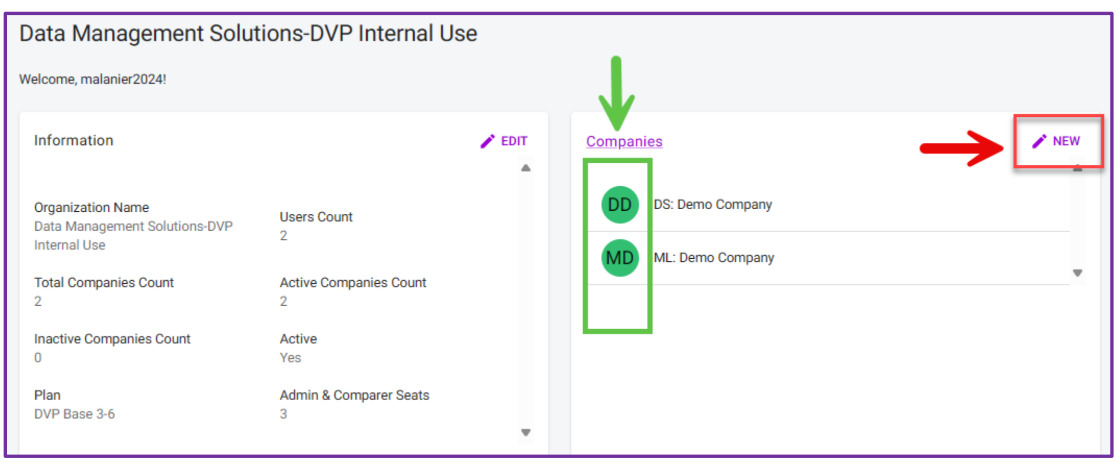
Note: The **Comparison** table export includes additional fields that are not displayed in the on-screen table but are available in the downloaded file.

Create the **Compare Only**

The compare process involves multiple steps, beginning with naming the compare and continuing through to its completion. Each step must be completed in sequence to move forward. Steps beyond **Step 5 – Compare** are optional and can be skipped if not applicable. With the exception of the initial compare creation, previously completed steps can be revisited and reset if needed.

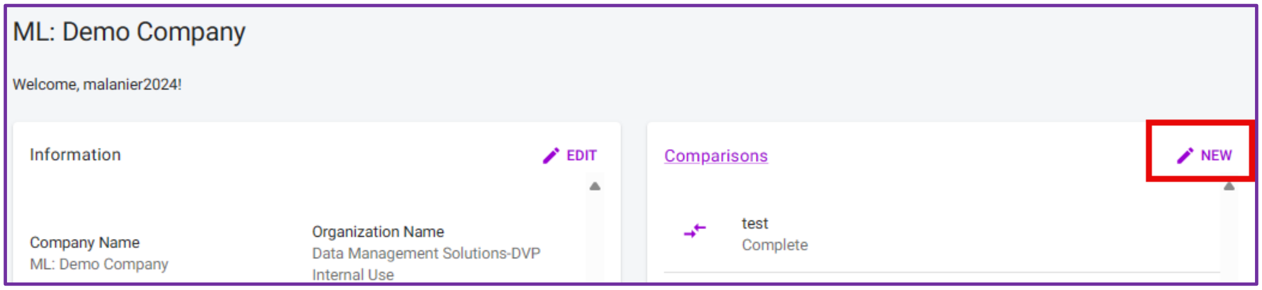
Select the Company

Select a Company or click NEW to create a new company.



Create New Compare

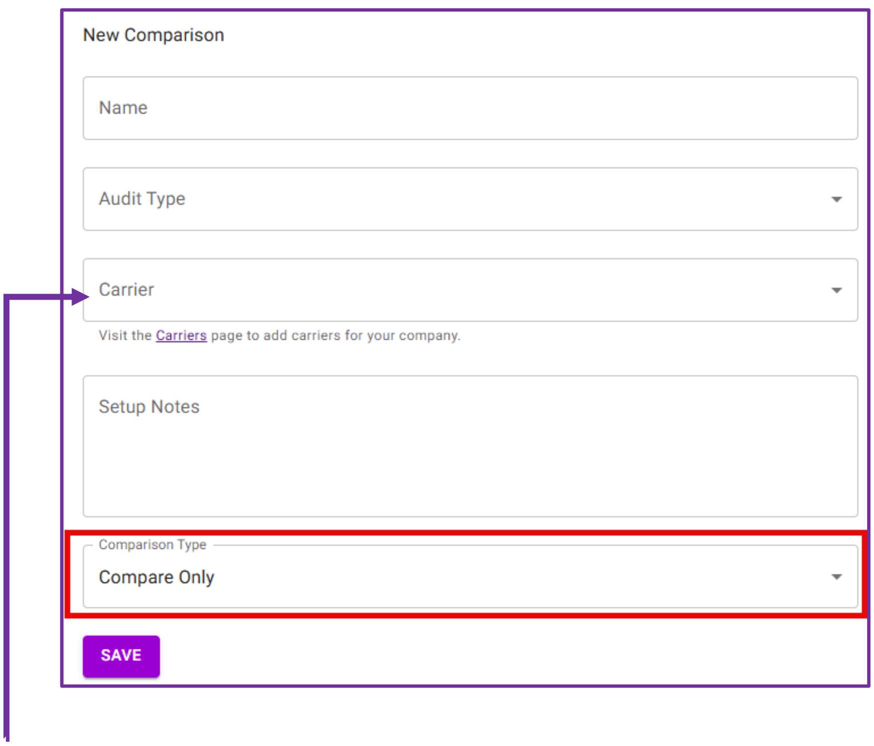
Select NEW to begin a new comparison



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

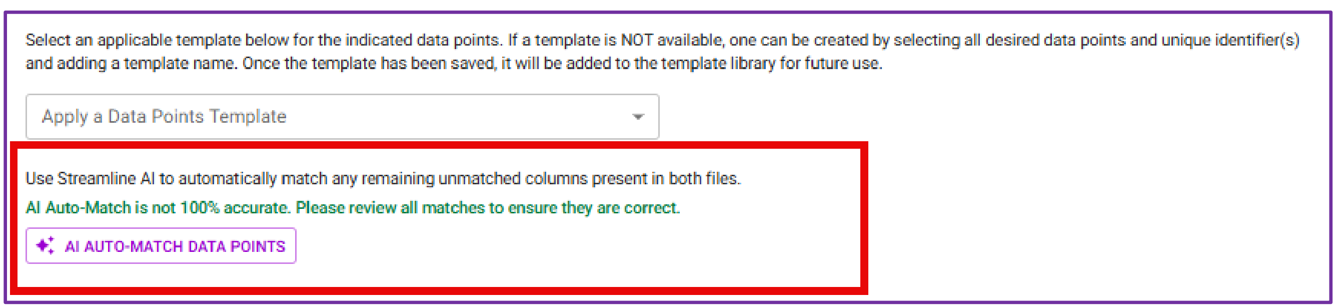
Import baseline and secondary files, select specific worksheets (if applicable), then click SAVE. If you use same file for both baseline and secondary, click USE BASELINE FILE. Rename file names using 31 characters or less, if desired.

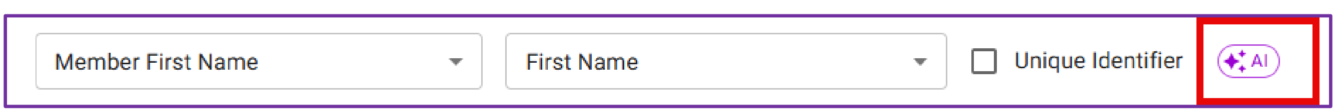
Select Data Points & Create Import Template

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.

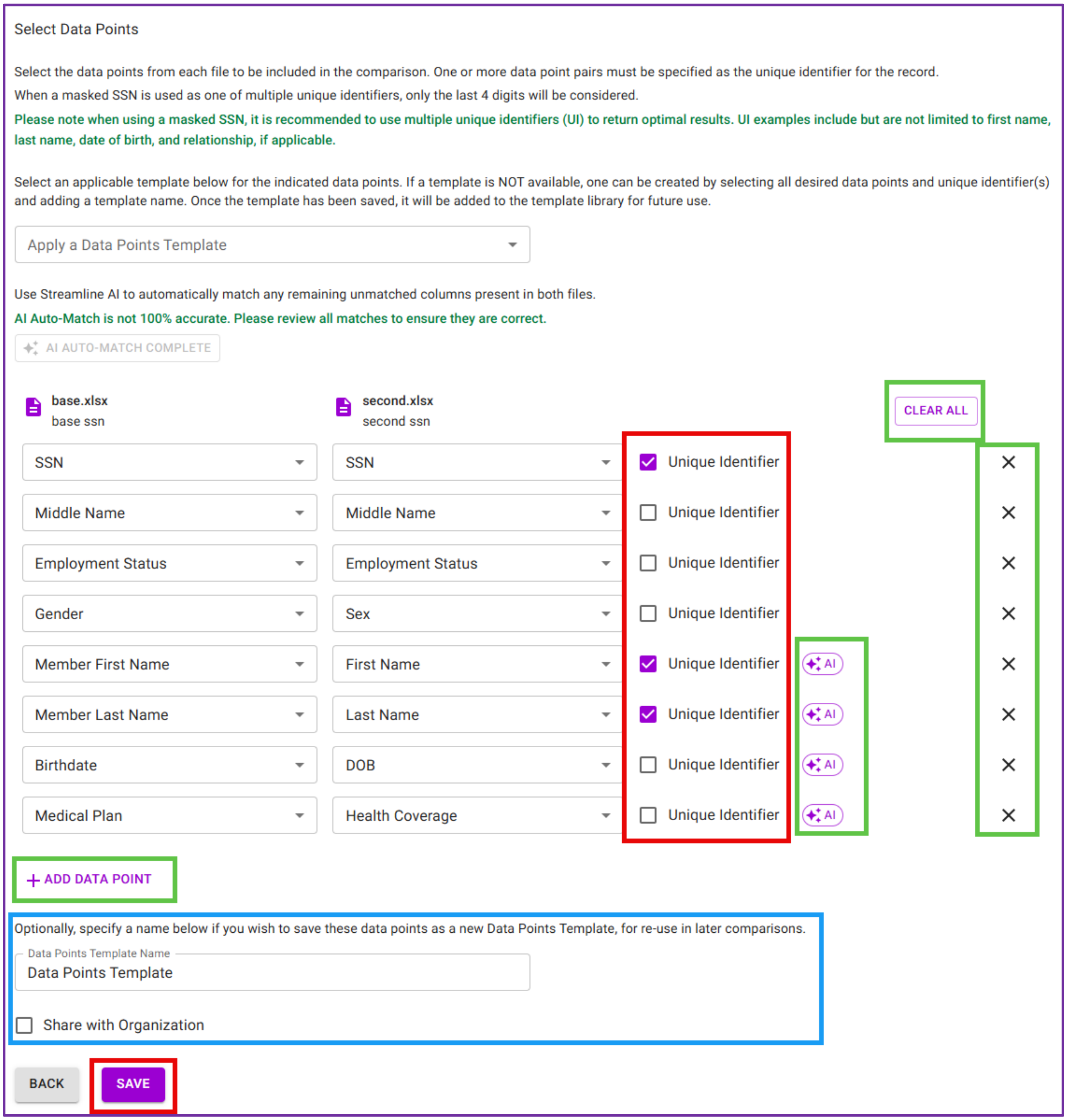
At least **one (1) unique identifier** must be selected. To remove all data points, click **CLEAR ALL**.

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.

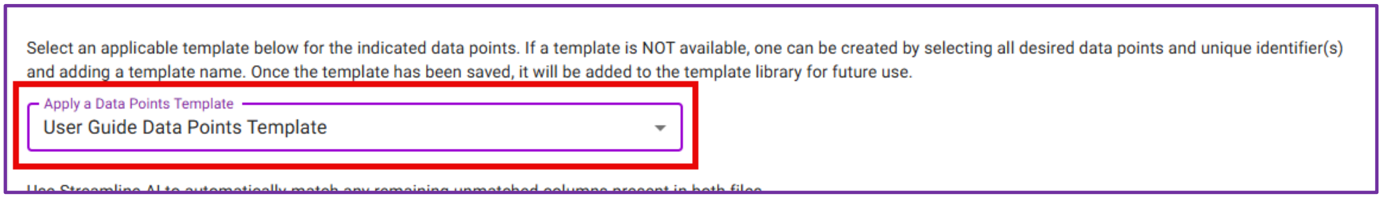
Company Admins (available under the Platinum Elite subscription) will only have access to templates created within their specific company.

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.

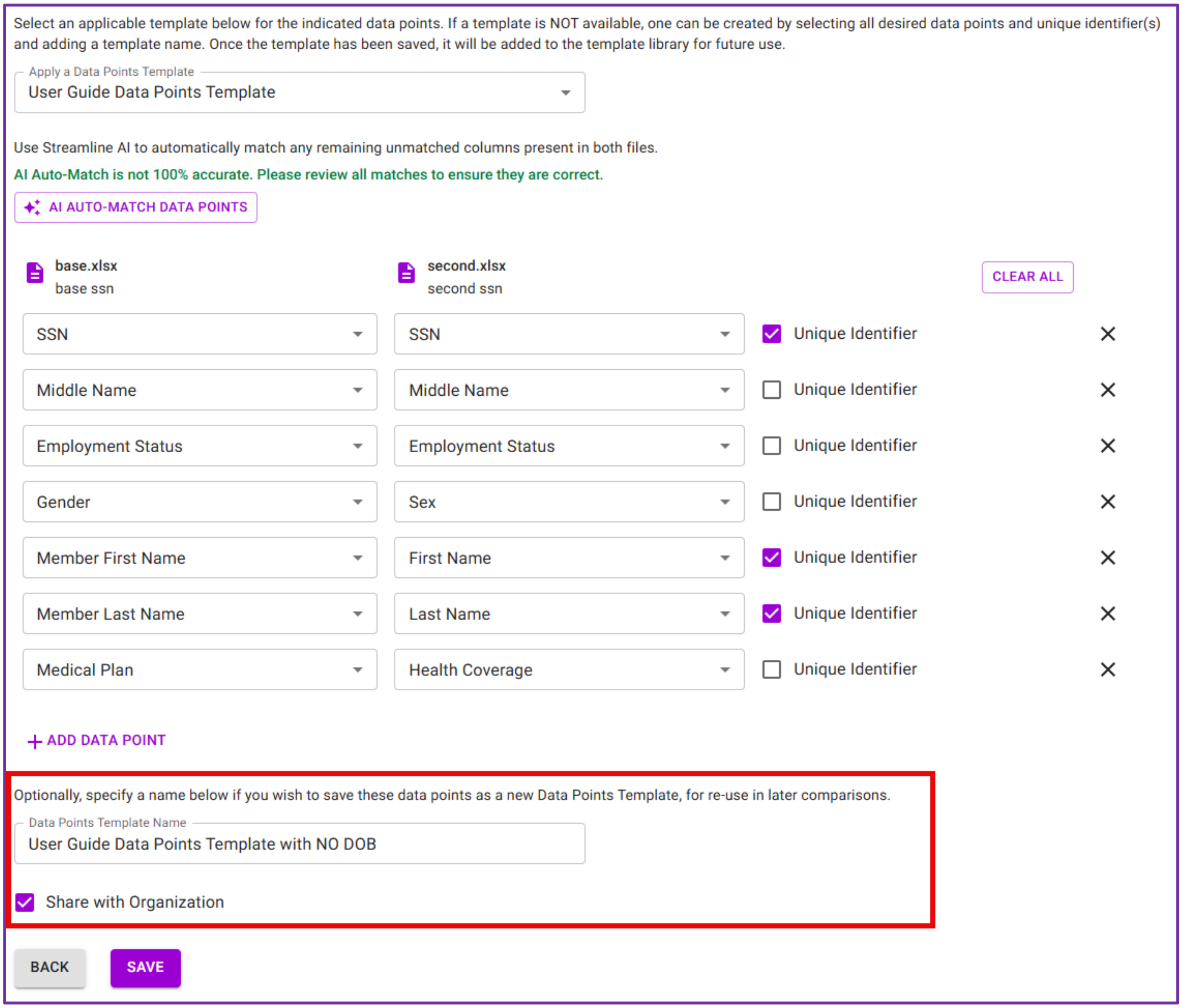


If no template is available, you can create one by selecting the desired data points and unique identifier(s), then entering a template name. Once saved, the template will be added to your library for future use and can optionally be shared with the organization for use across other companies.

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 User Guide Data Points 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.

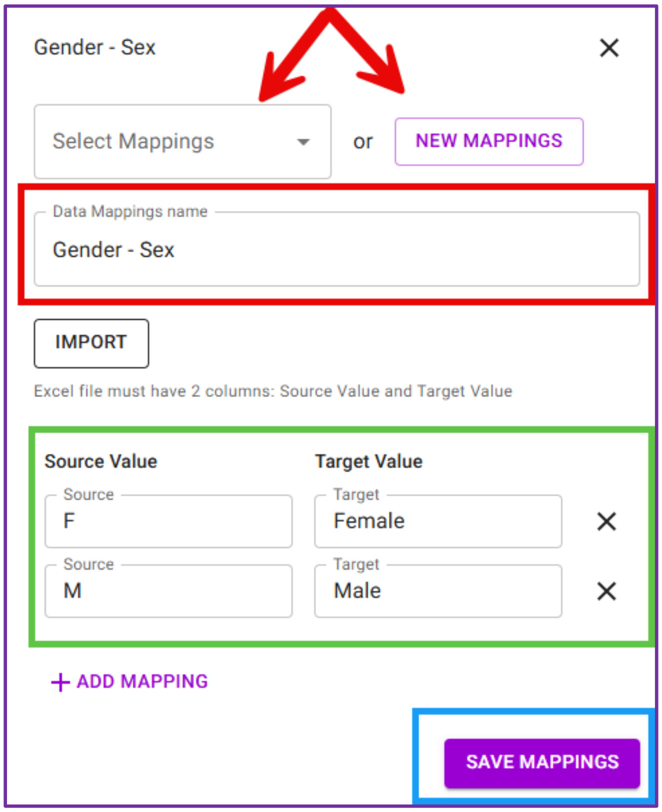
Mappings can be created several ways.

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

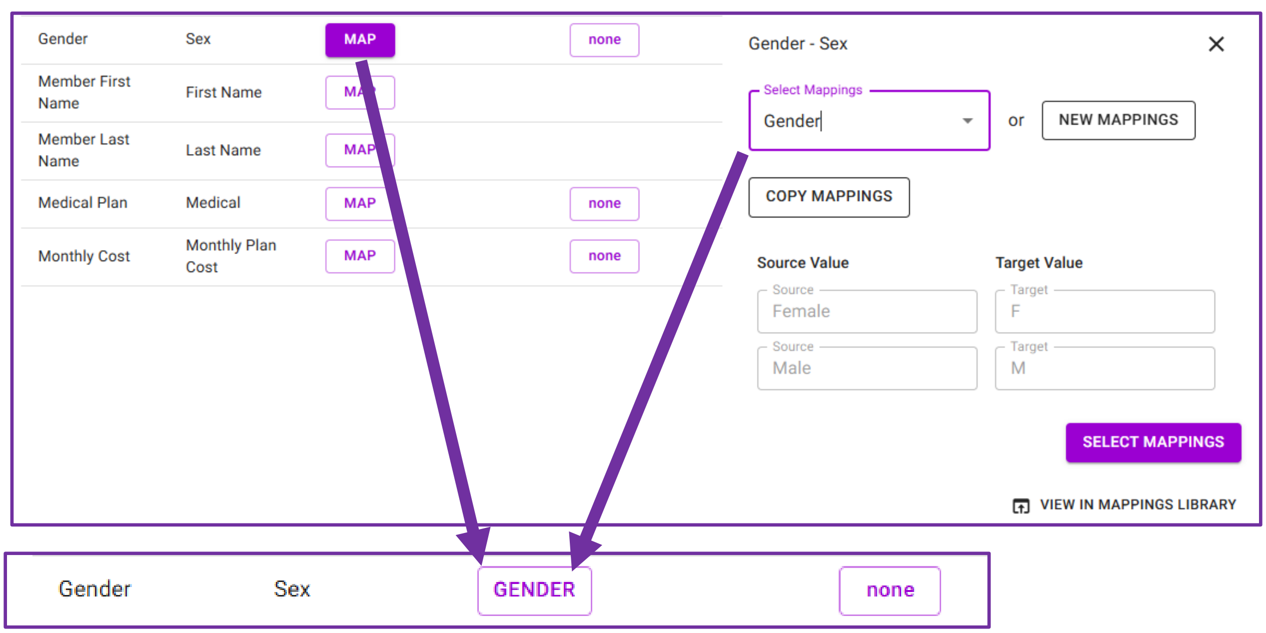
__To Manually create a mapping:__

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.



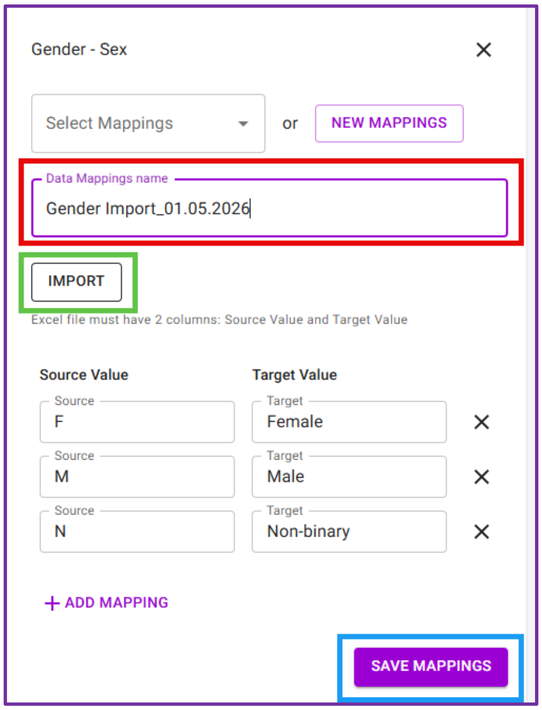
If you use existing mapping, click SELECT MAPPINGS.



To Import a mapping:

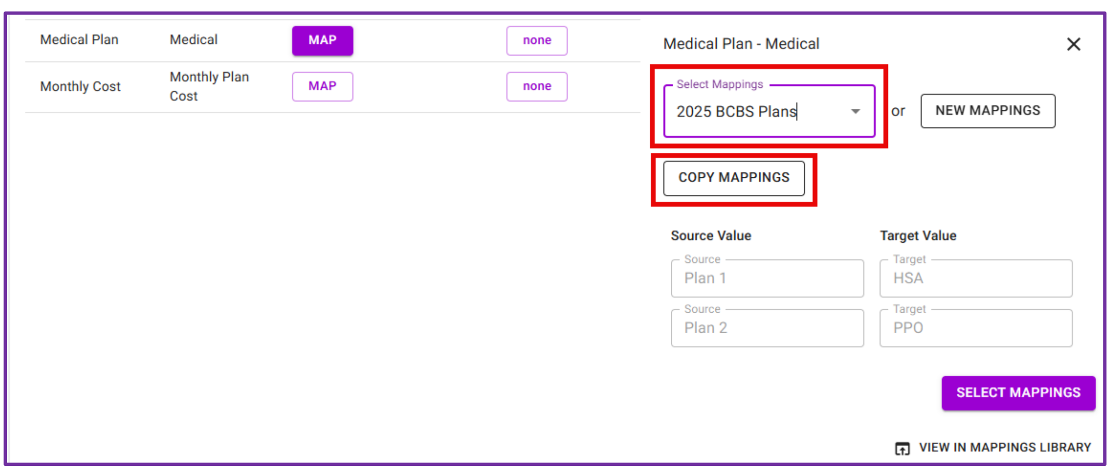
To add a new mapping, click **New Mappings**. Enter a mapping name, then select **Import**.
The import file may be a single-sheet Excel file or a CSV file. If you are using an Excel file with multiple sheets, the mapping **must** be on the first tab—otherwise, the import will fail.

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



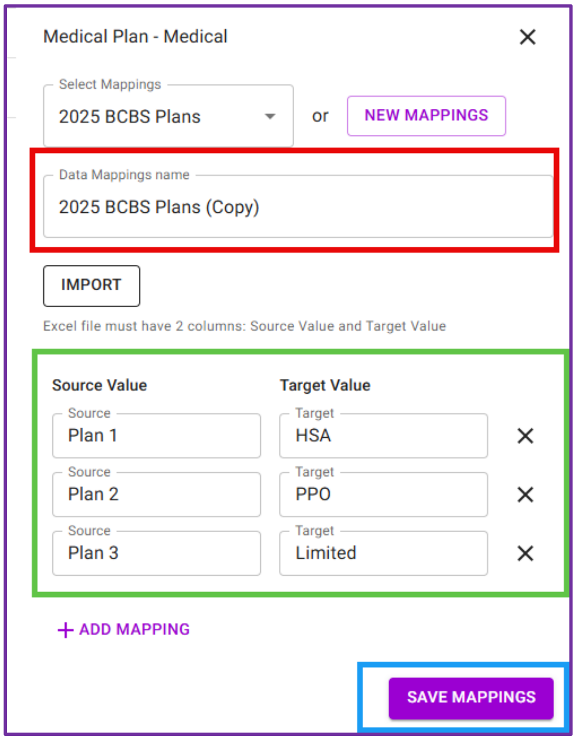
To Copy and modify an existing mapping:

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

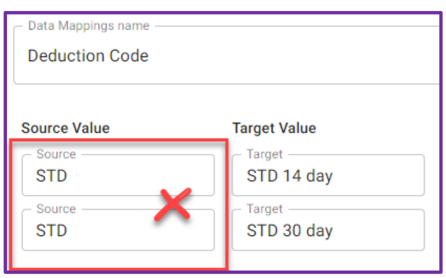


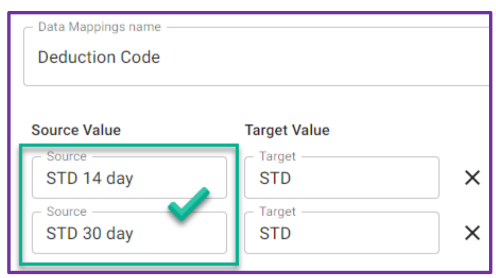
This creates a duplicate of the mapping with **(copy)** added to the name. You can then rename the mapping and add, update, or remove any source or target values as needed.

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



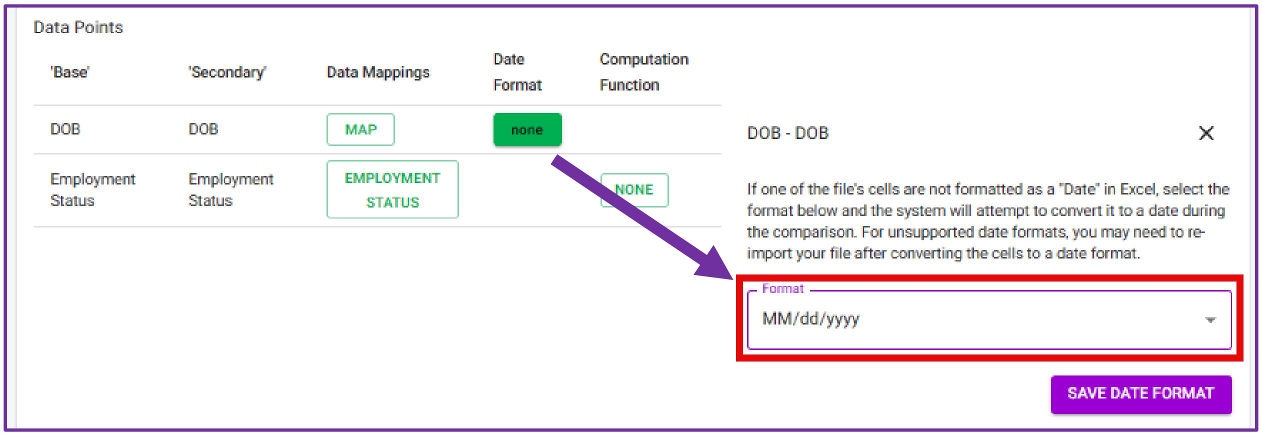
NOTE: The **SOURCE VALUE** in mapping must be unique. If the same value is used more than once under **SOURCE**, an error will occur. However, it is acceptable to use the same **TARGET VALUE** multiple times.





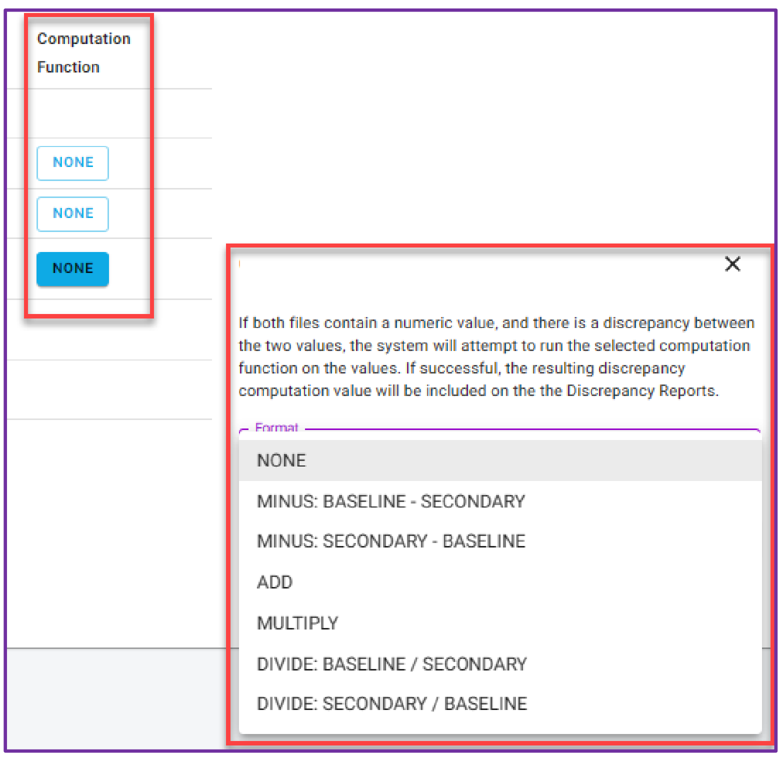
Mapping – Date Format

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.

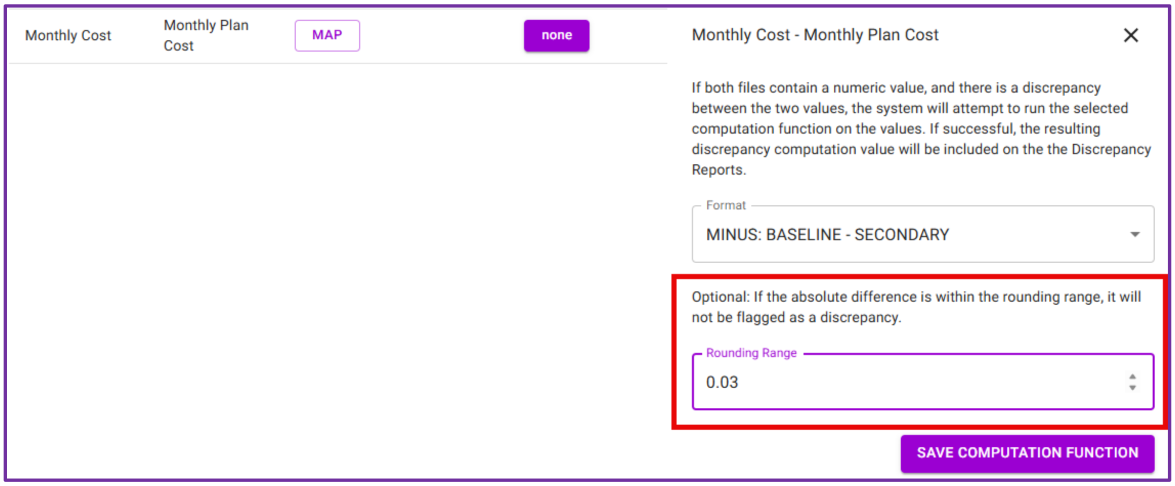


Mapping – Computation

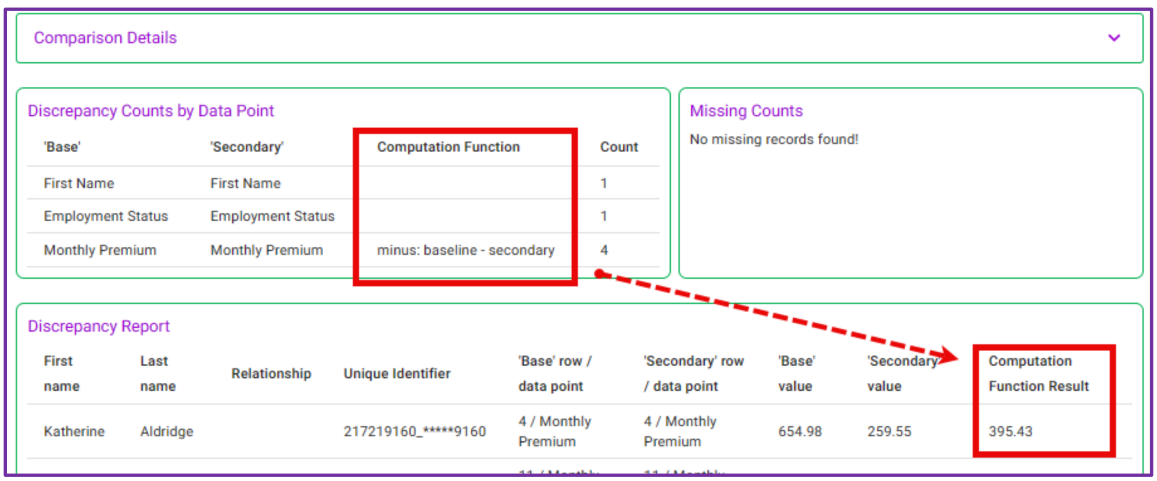
Add a computation (subtraction, addition, multiplication, division) to any numeric data point from the baseline file to any numeric data point in the secondary file. Add the computation by clicking the button under the Computation Function column for the desired data points and then selecting the function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

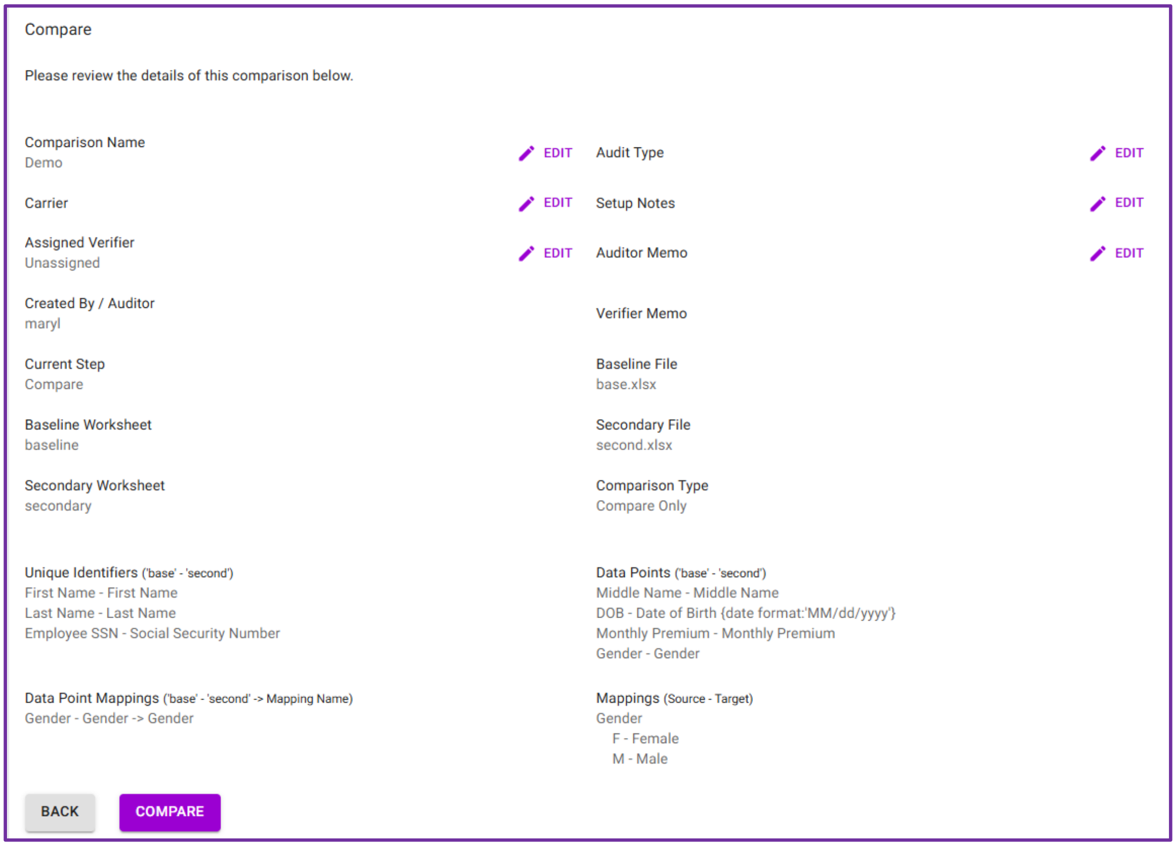


Note**:** This functionality applies **only to numeric fields**, and **only to data points that are *not* part of the unique identifier**.

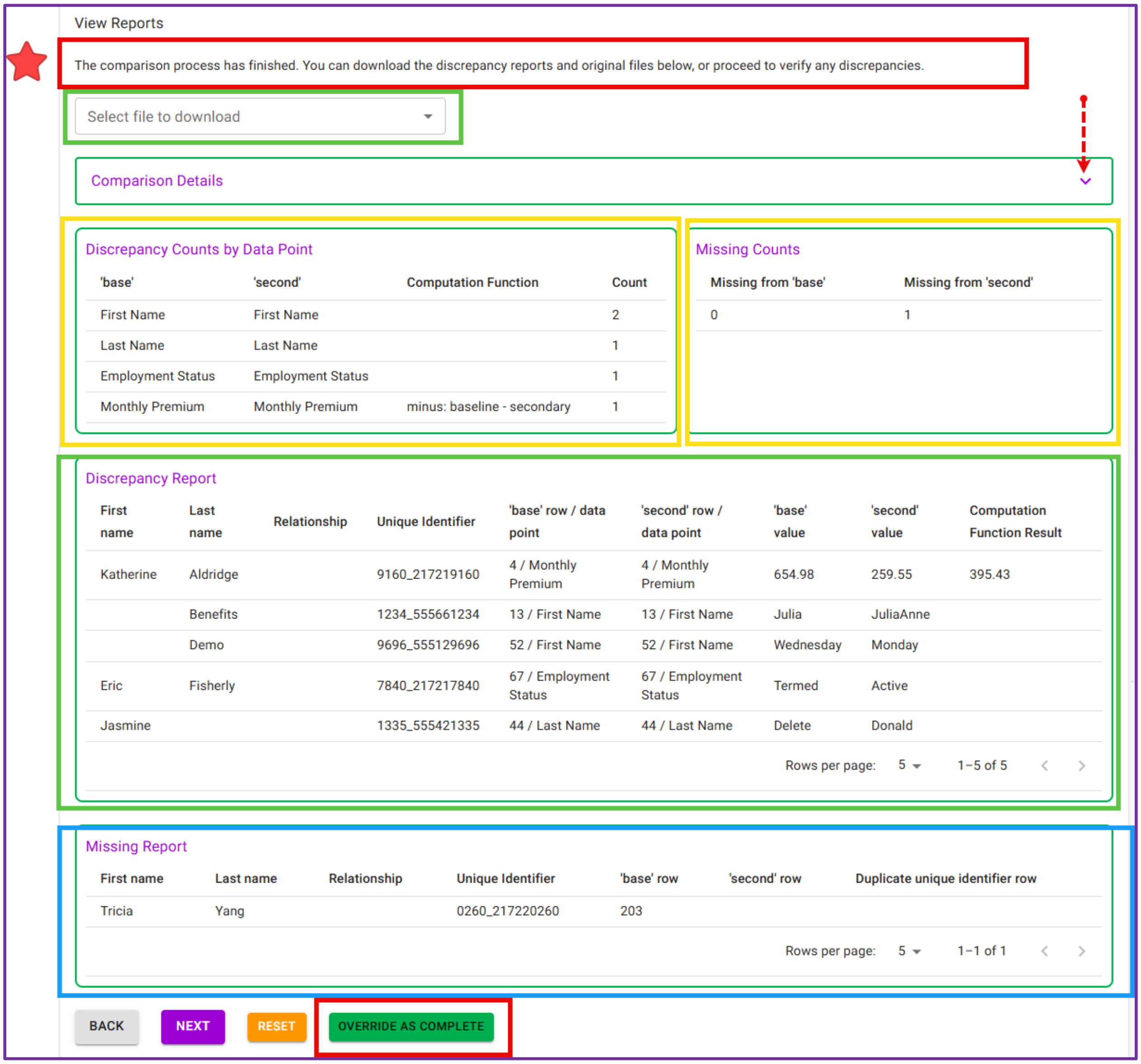
Only results from the **subtraction (minus)** function will proceed through the full compare process. All other functions will stop at **Step 5**.

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 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.

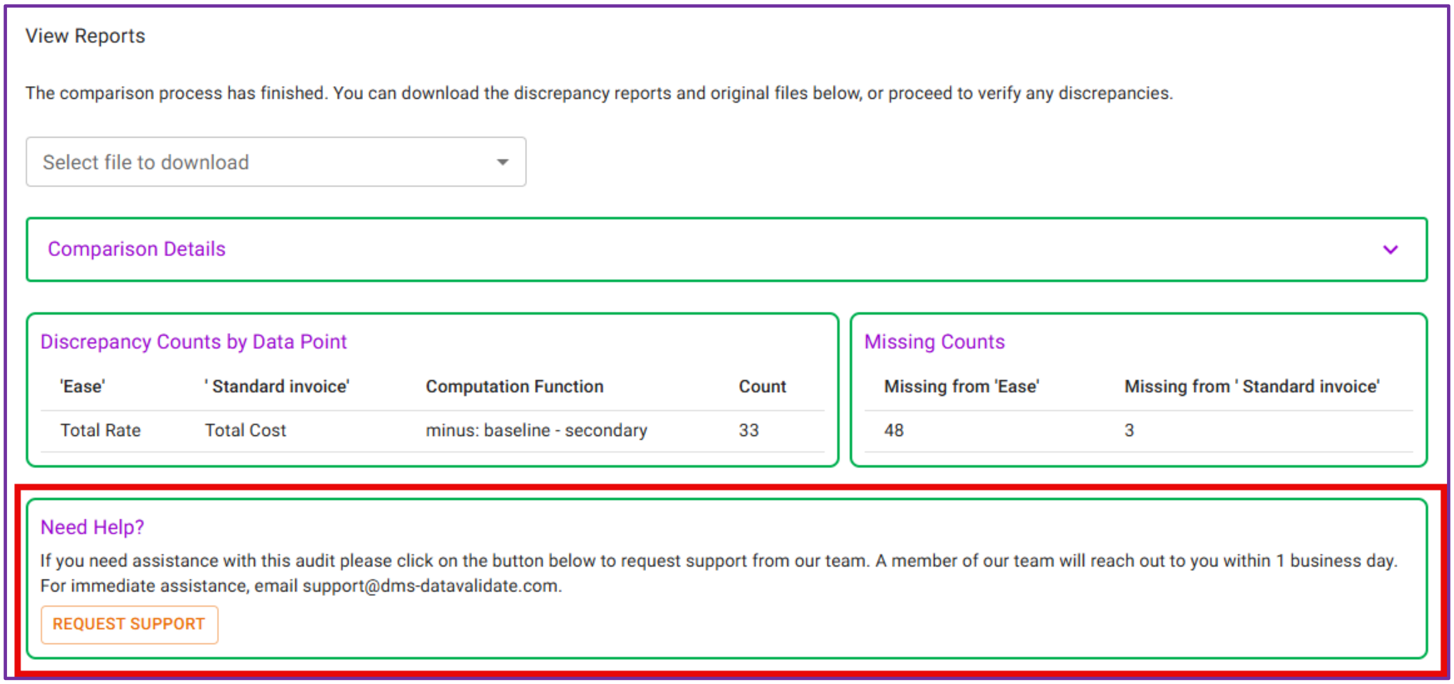


We've introduced a **Request Support** option on **Step 5 – Compare** for audits that return more than 30 discrepancies and/or missing items. This option appears only when that threshold is met.

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.

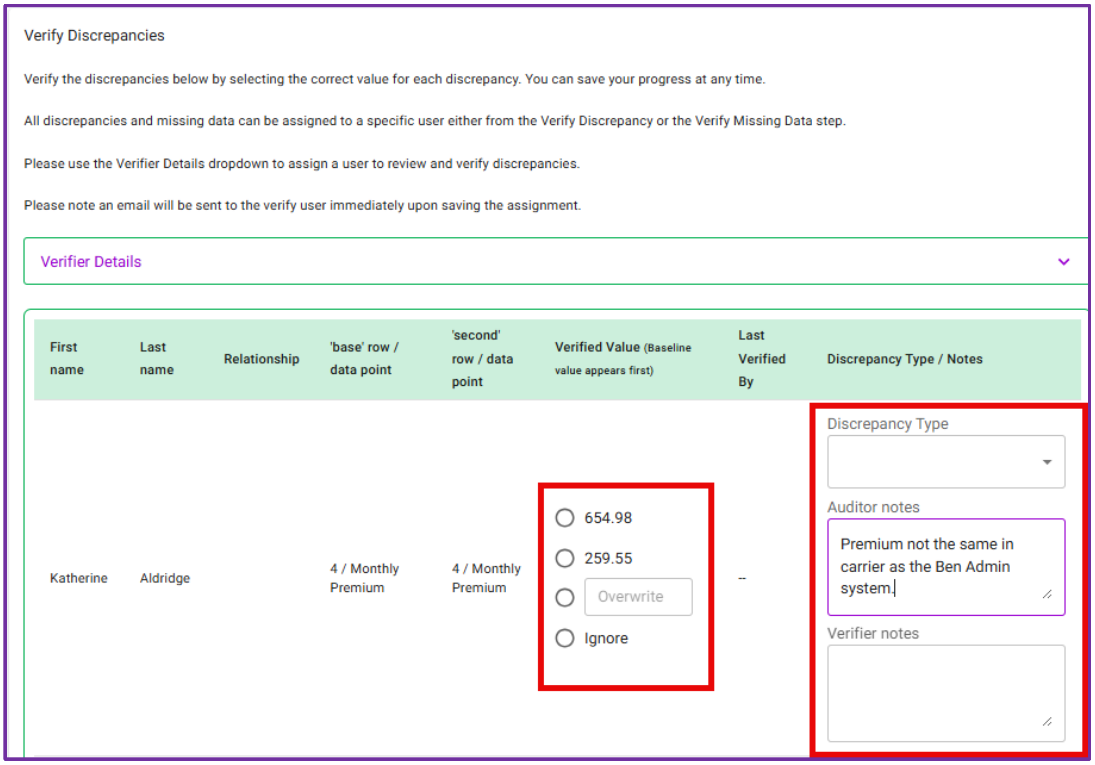
Please note that the **Streamline Support Team** is always available, regardless of audit results. If you need assistance at any time, you can contact us at **support@dms-datavalidate.com**.

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 comparison, the audit must be reset to a previous step. If the audit still contains more than 30 discrepancies and/or missing items after reset, the **Request Support** option will become available again.

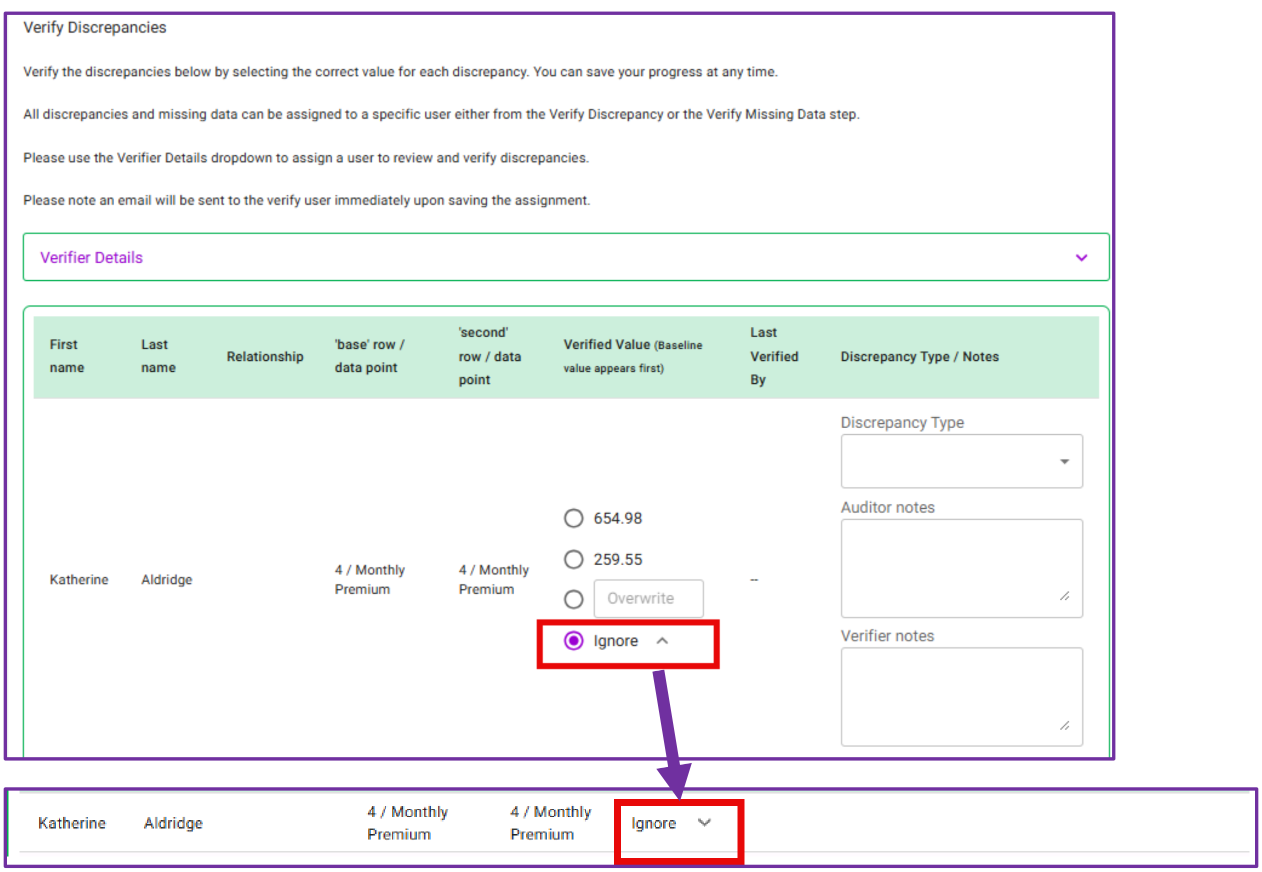


Verify Discrepancies

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.

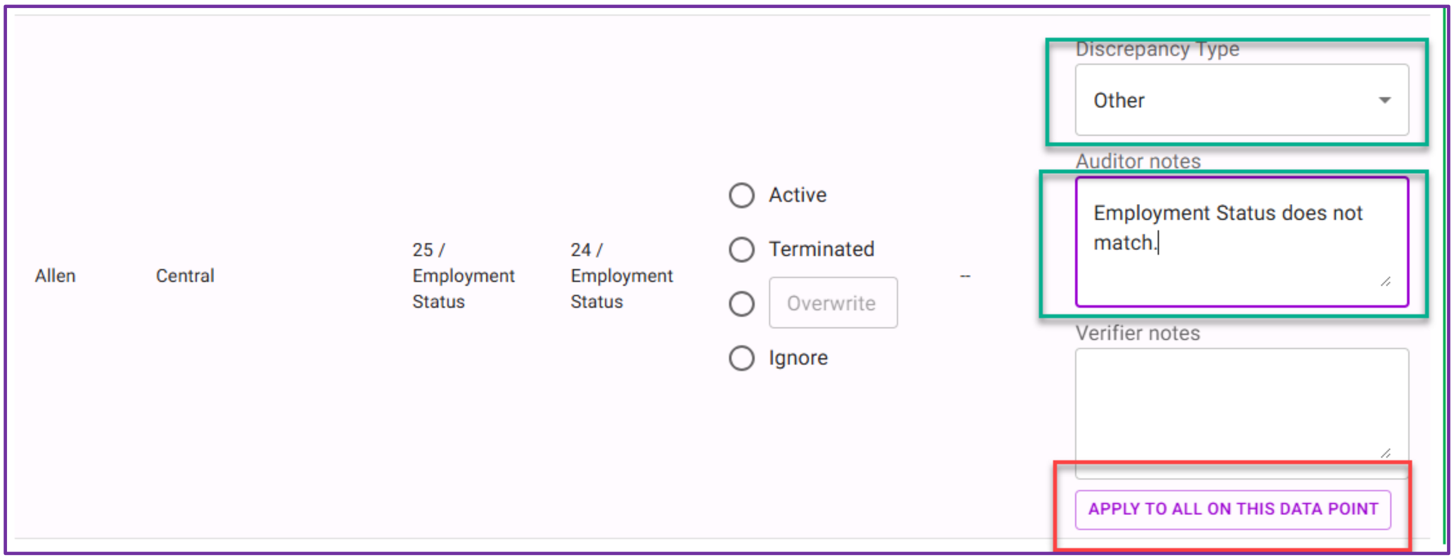


If the discrepancy is not a true discrepancy or if the verifier desires to ignore it, select IGNORE. Any discrepancy marked as IGNORE, can be minimized by clicking the caret (^)

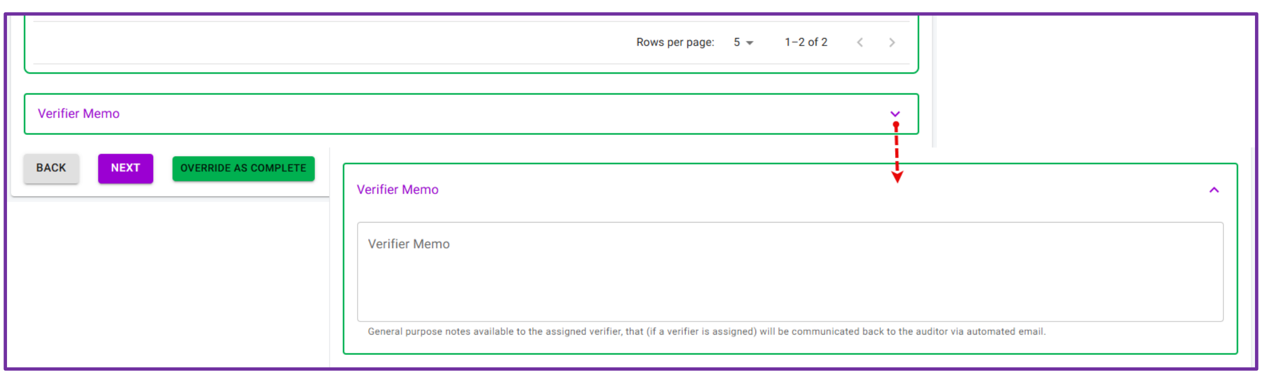


You can now use the **Apply To All On This Data Point** feature to update matching data points. When selected, the chosen discrepancy type and any auditor notes will automatically be applied to all occurrences of the same data point. Please note that the **Apply To All** will overwrite any existing discrepancy types or notes for those matching occurrences. **This feature is available only in Step 6: Verify Discrepancies.**

In the example below, the Apply To All feature is used on the Employment Status data point. As a result, the Discrepancy Type of Other and the Auditor Note, *"Employment Status does not match,"* will be applied to every Employment Status data point in the comparison.

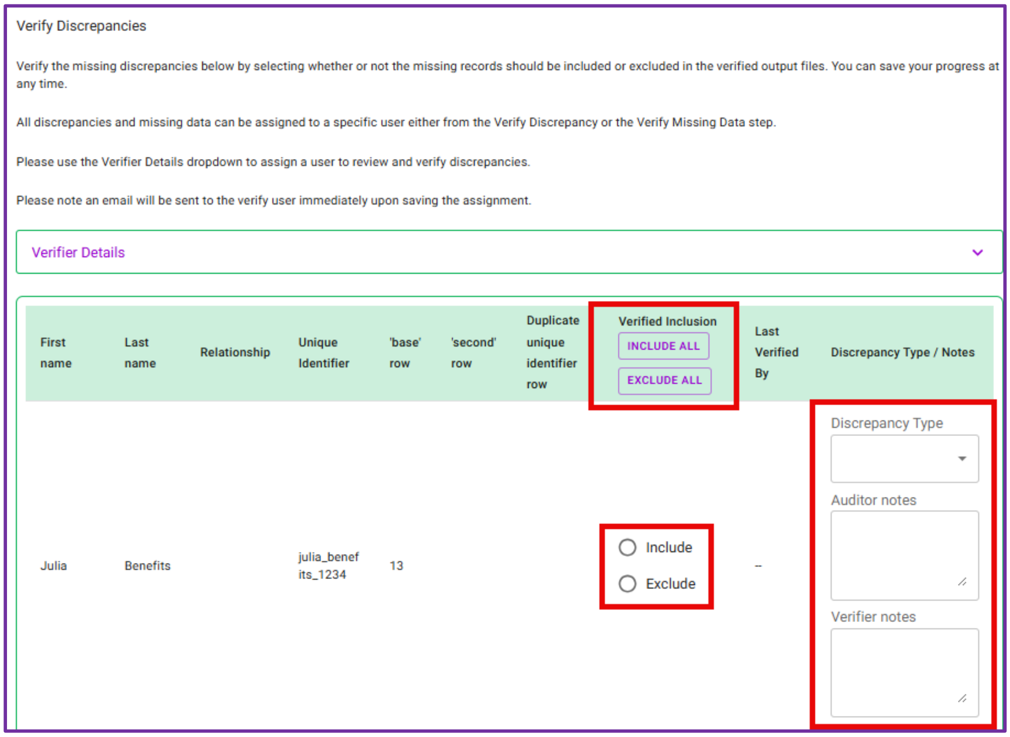


Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.

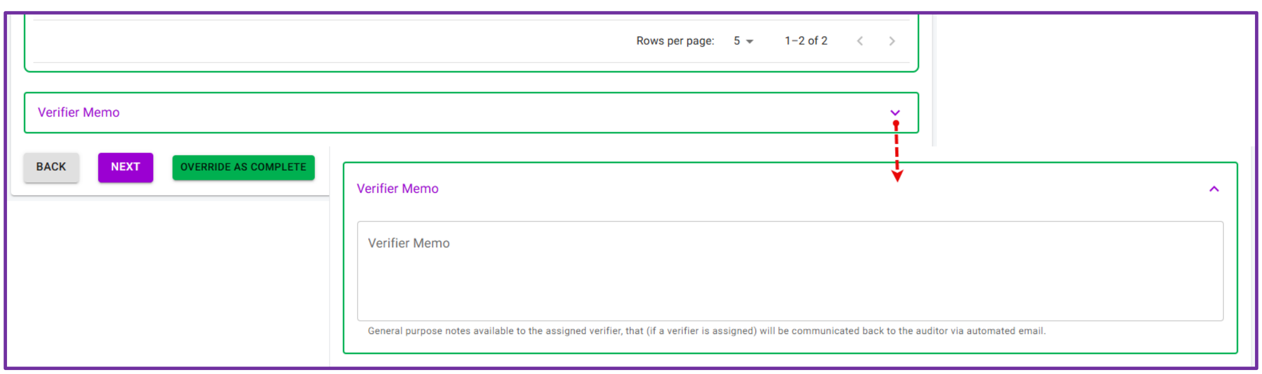


Verify Missing

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.

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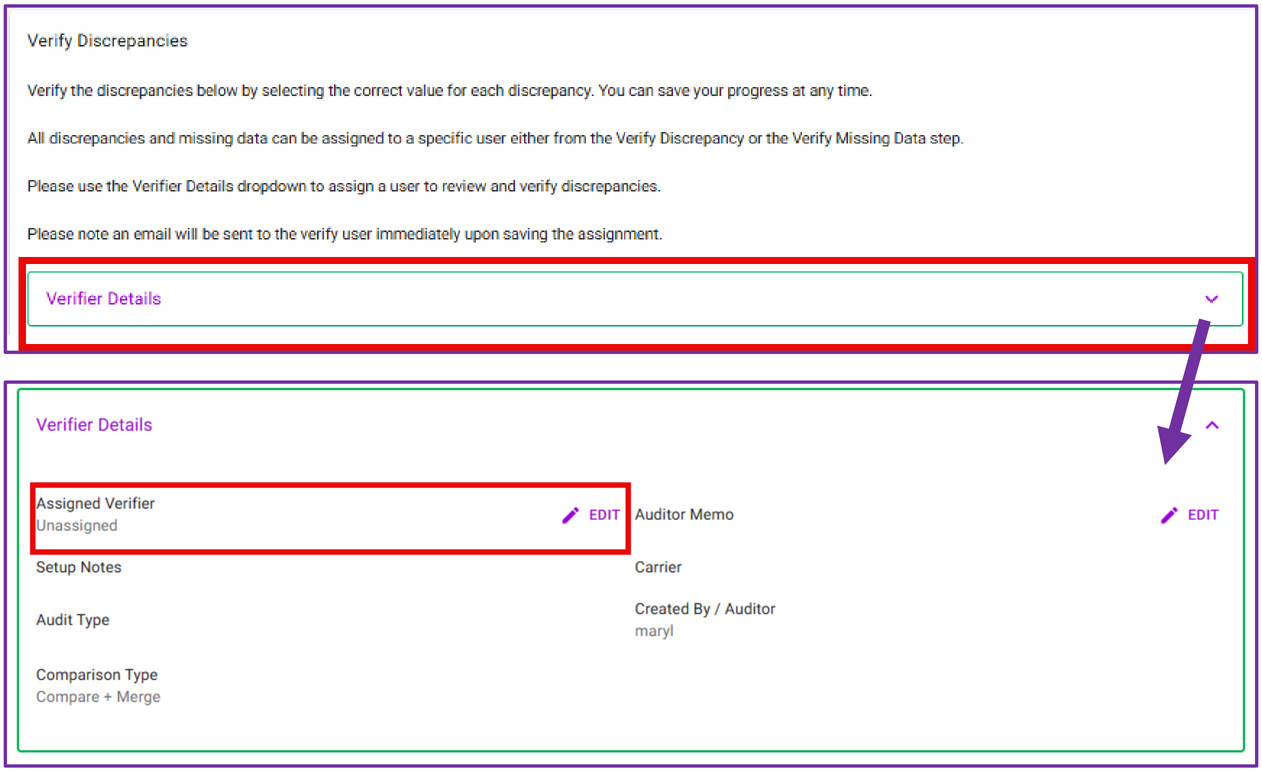


This will open up the comparison edit section. In the Assigned Verifier dropdown, select an applicable user. **An audit can be assigned to anyone who has access to the specific company and only to users with the same level access. For example, a Company Admin user can only assign an audit to other Company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

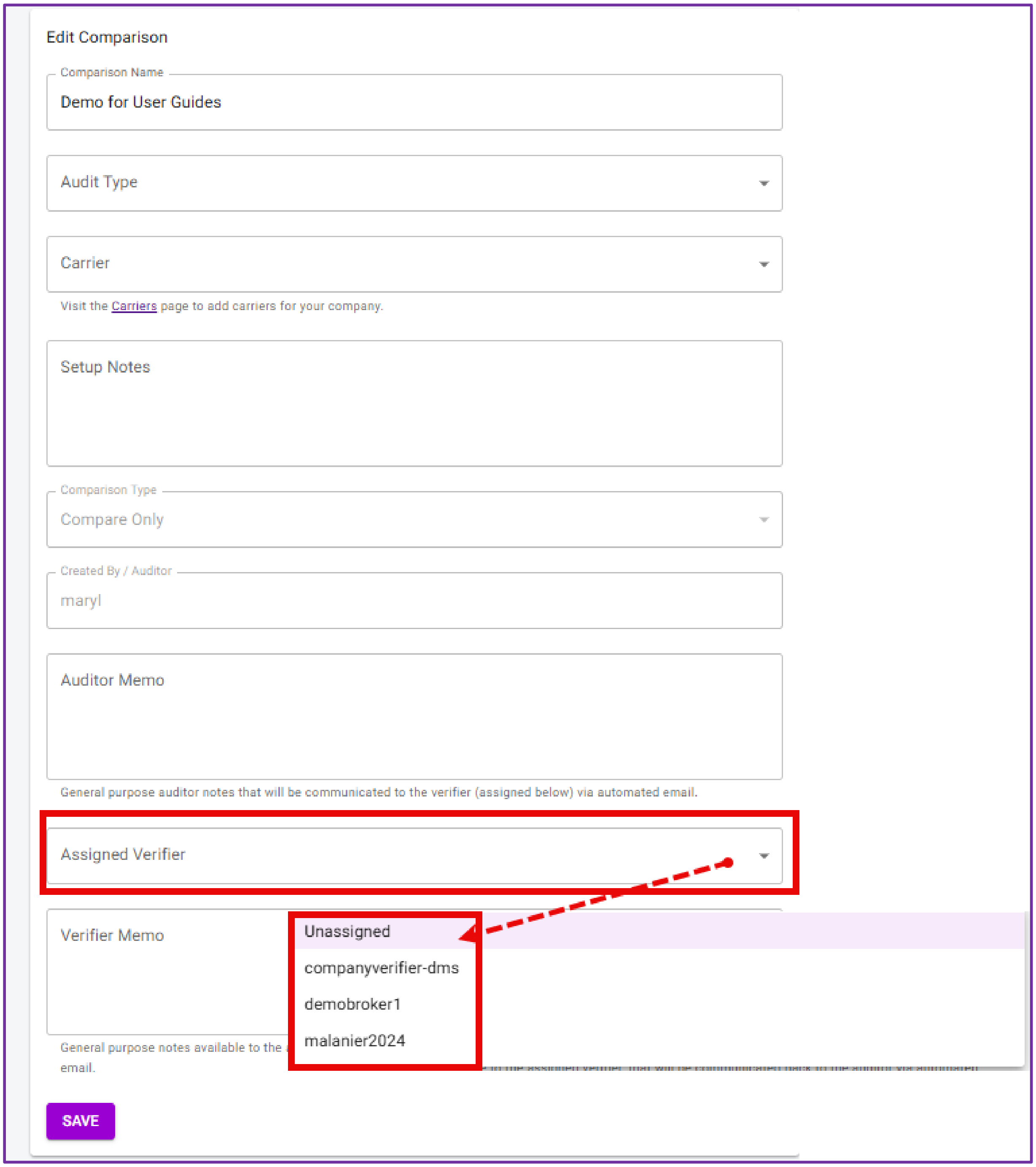
Please click here below to log in and complete the verification process for any discrepancies.

{Auditor Memo}

Thank you,

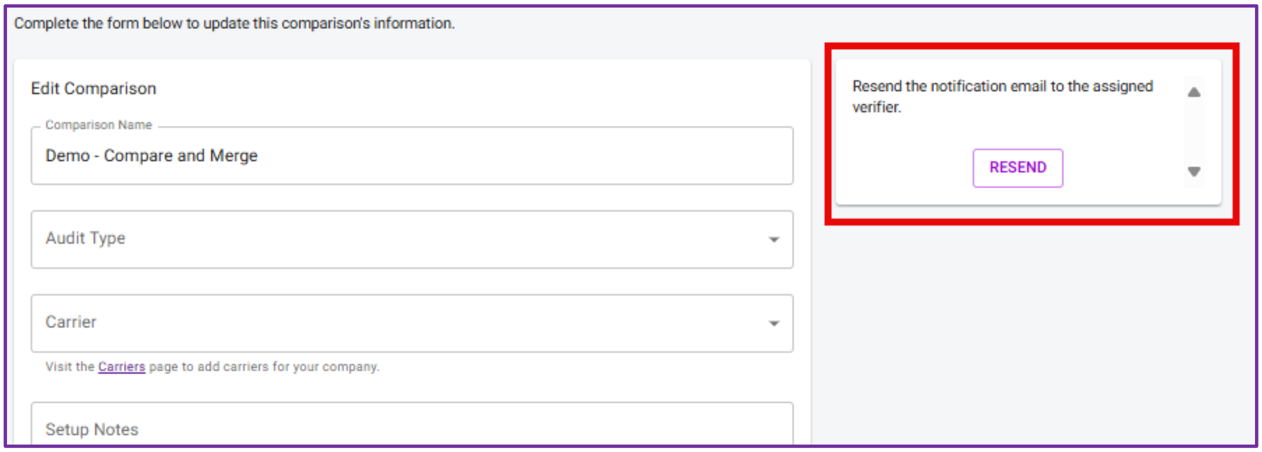
On behalf of {Auditor First Name and last Name}, {Organization Name if Org Level or Company Name if Company Level User}

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.



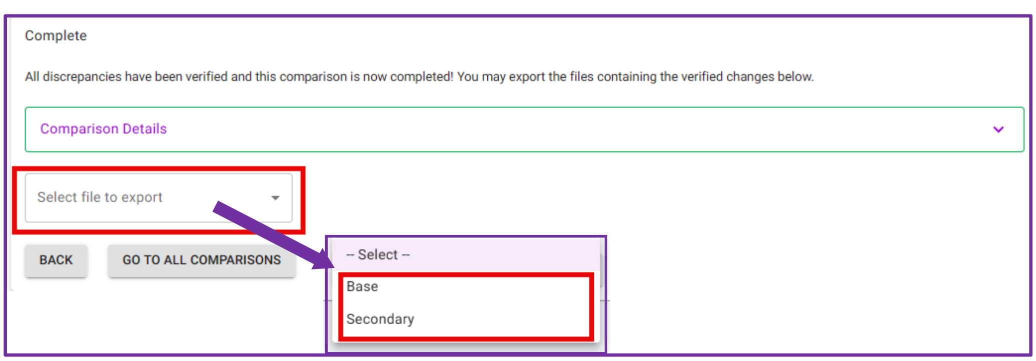
Complete the Compare

Data verification is complete.

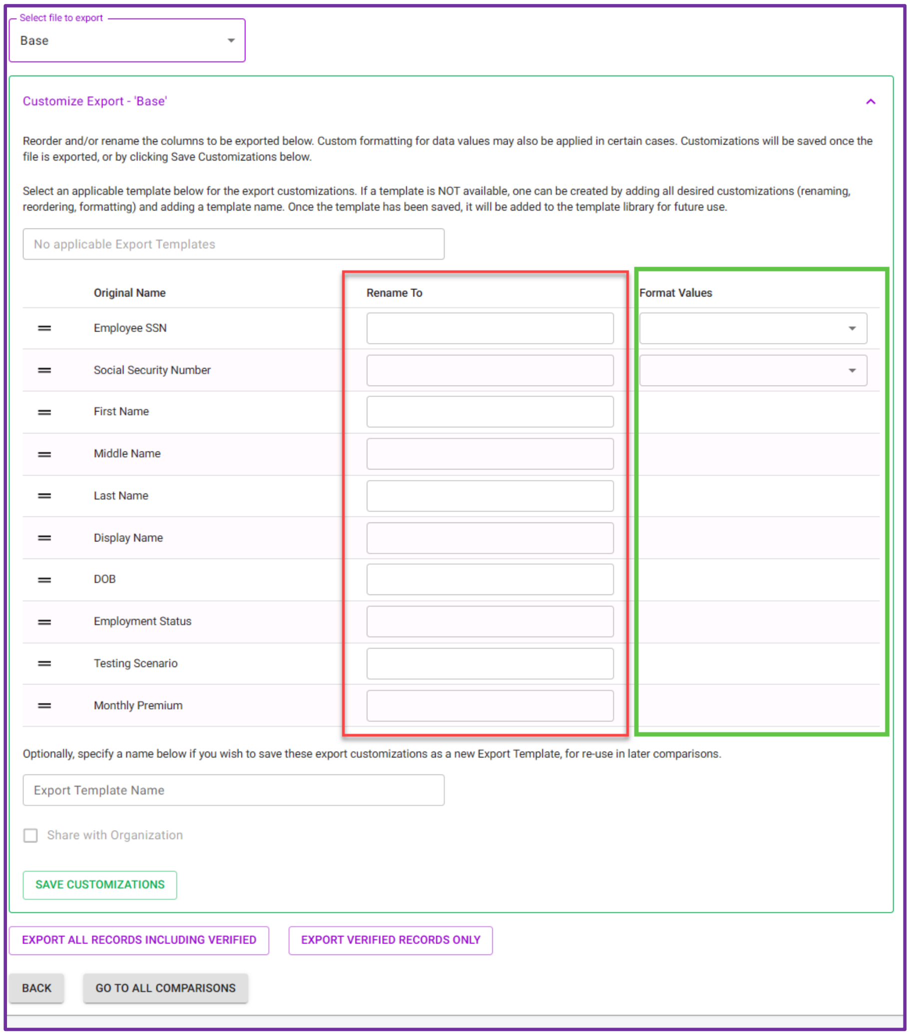
If the audit was assigned to a specific user within the application, the auditor will receive a notification email that the audit is complete.

> 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.

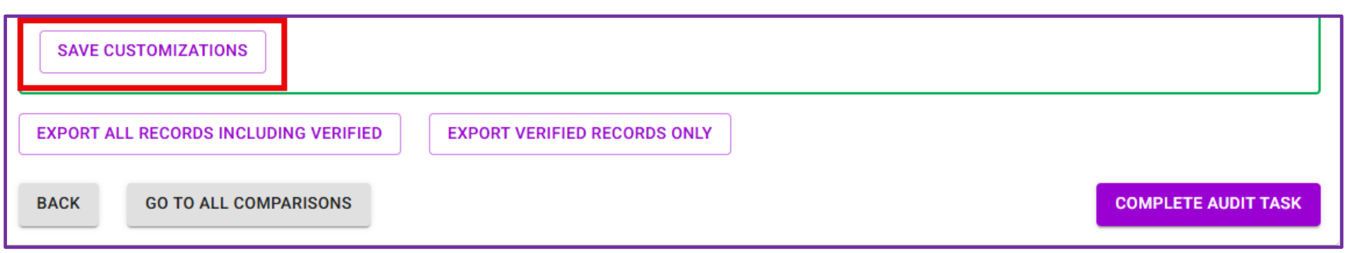


Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the application's key words. For a list of the keywords, please reference the Keys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



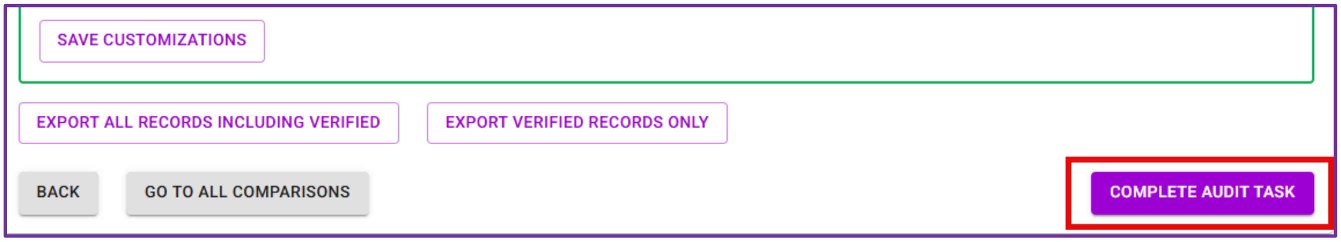
Column names can also be reordered by dragging and dropping data point in desired location.

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.

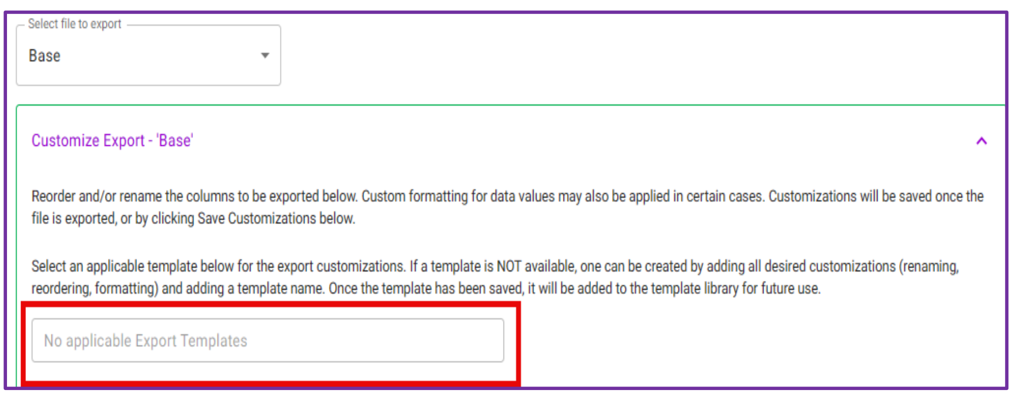


Export Template

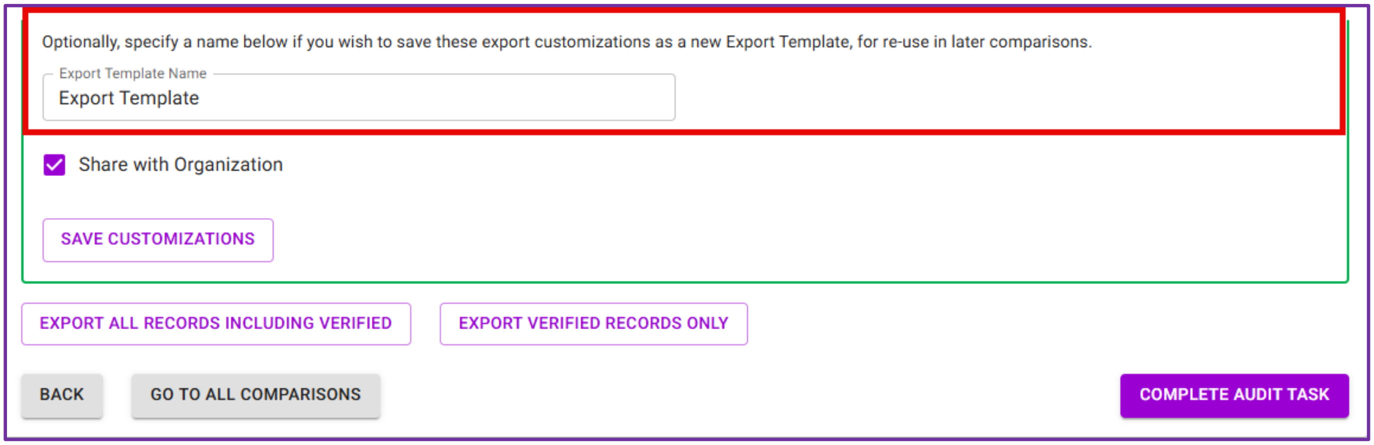
Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming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

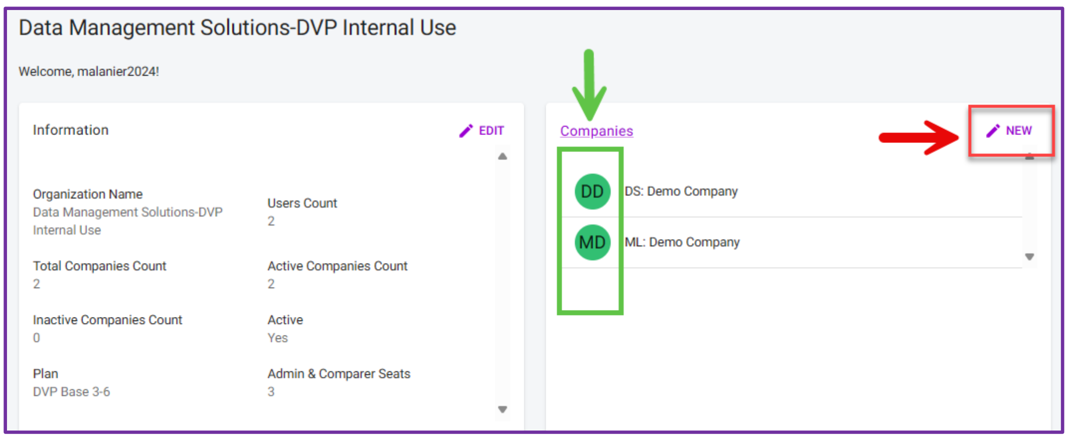
Questions: Contact Support@dms-datavalidate.com

Create the **Compare and Merge**

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.

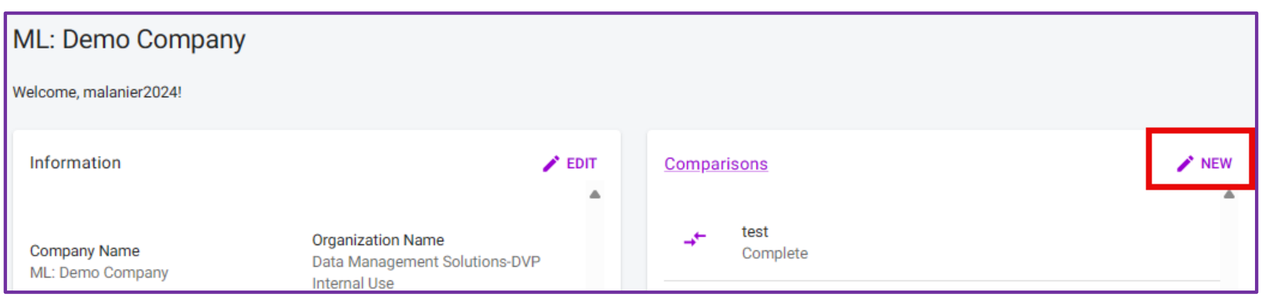
Select the Company

Select Company or click NEW to create a new company.



Create New Compare

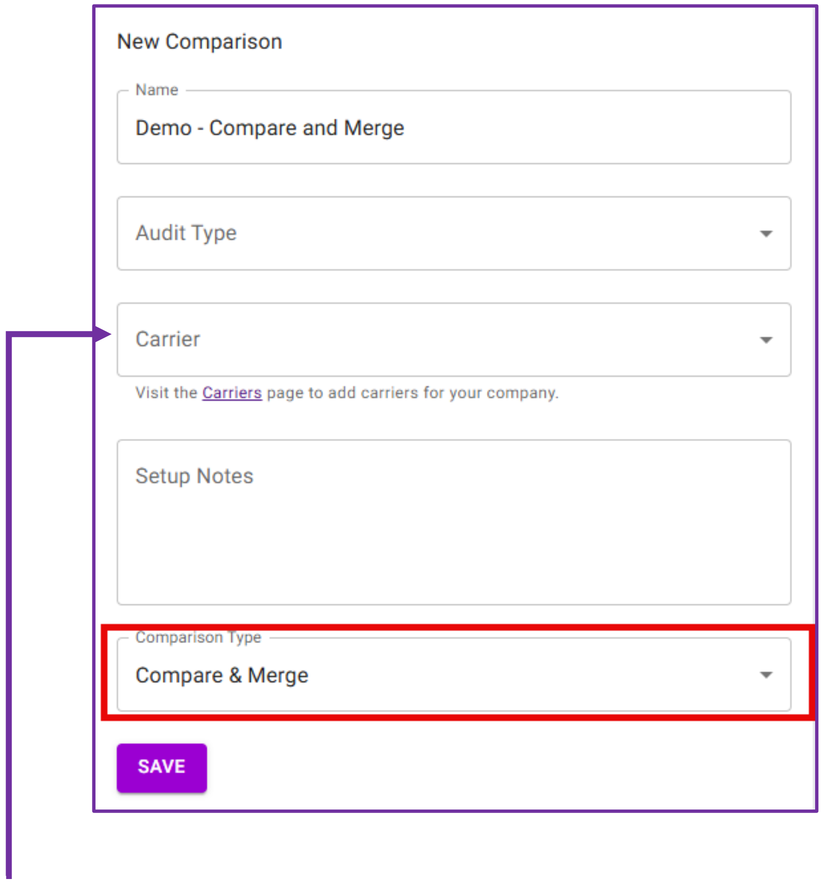
Select NEW to begin a new comparison



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.

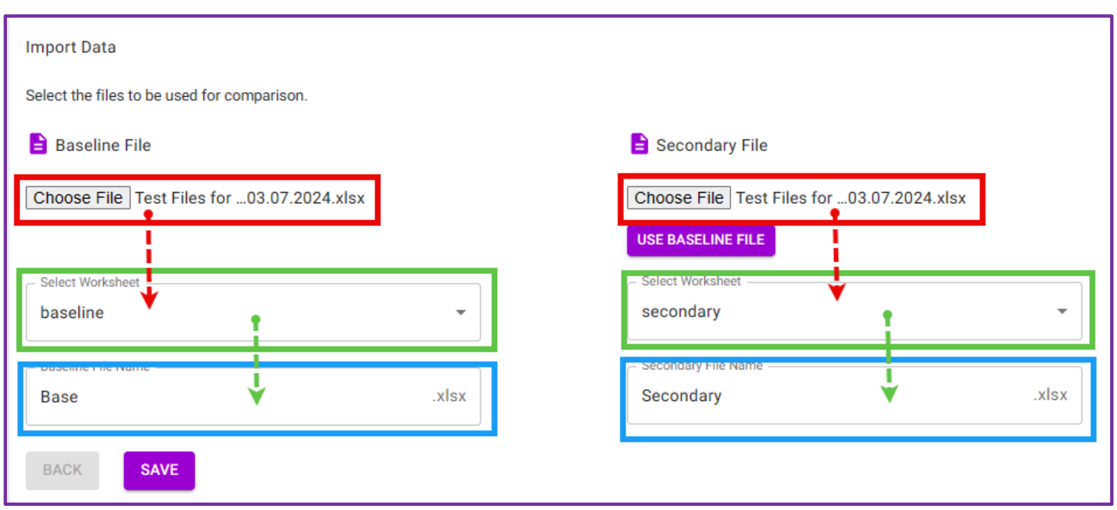
Please Note that once the comparison type is selected and saved, it cannot be changed.



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 using same file for both baseline and secondary, click USE BASELINE FILE. Rename file names using 31 characters or less, if desired.

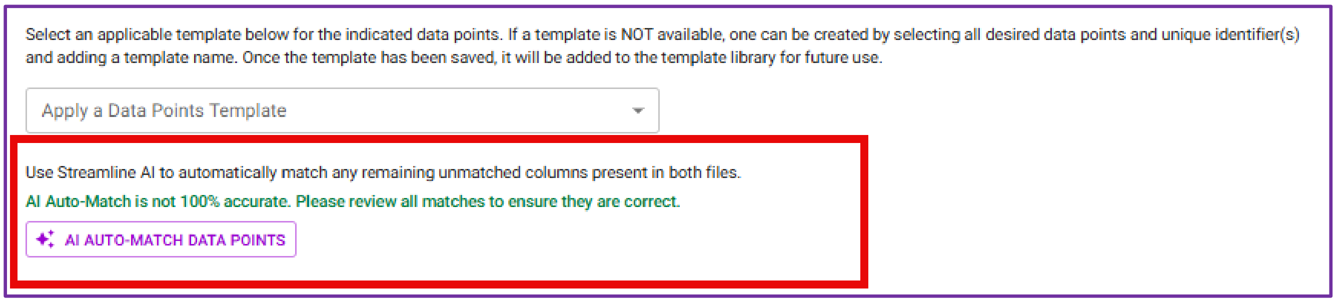


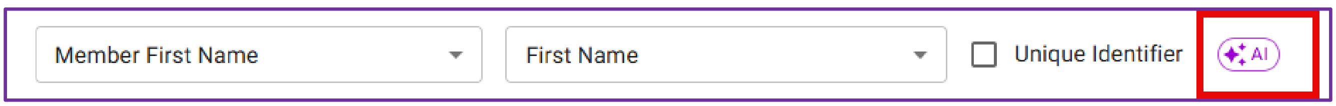
Select Data Points & Create Import Template

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.

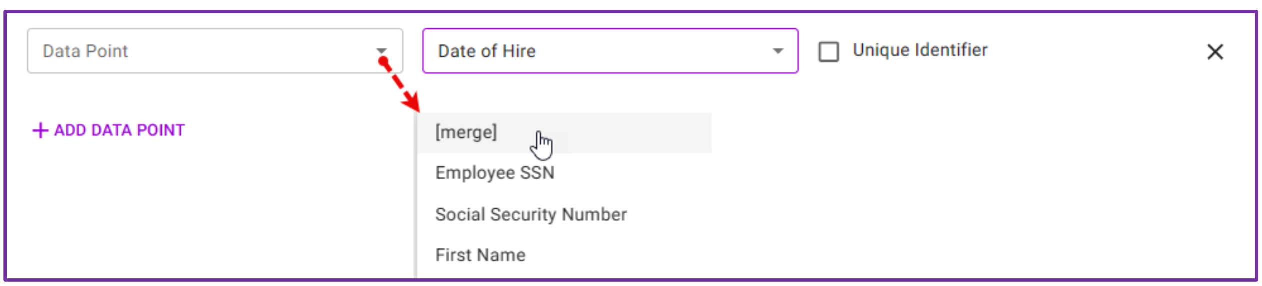
The option to use AI is available by selecting the **AI AUTO MATCH DATA POINTS** button. This will prompt the system to attempt to match any remaining data points. All AI-matched fields will display an AI icon beside the data point.





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



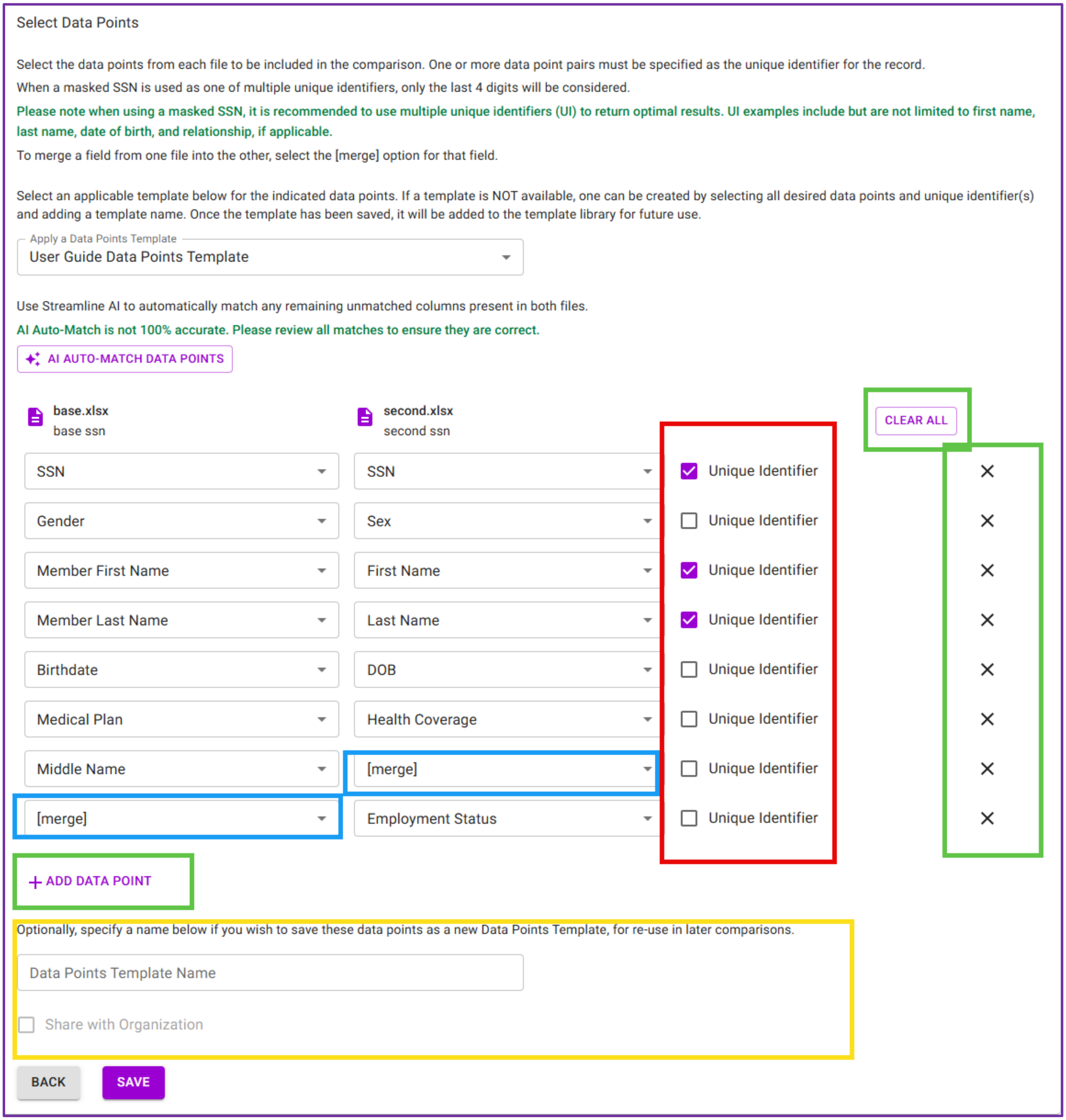
At least **one (1) unique identifier** must be selected. To remove all data points, click **CLEAR ALL**.

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.

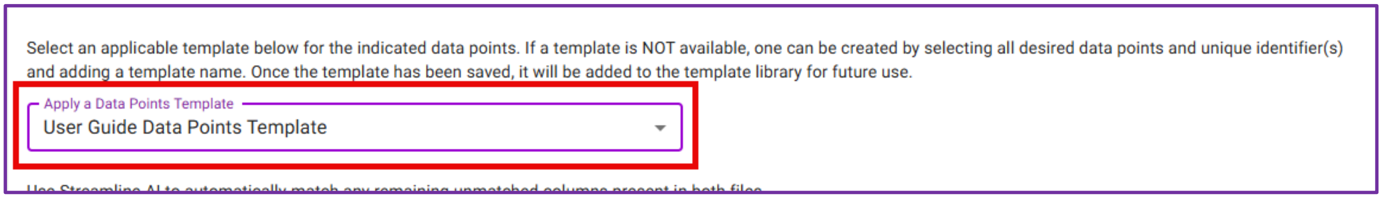
Company Admins (available under the Platinum Elite subscription) will only have access to templates created within their specific company.

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

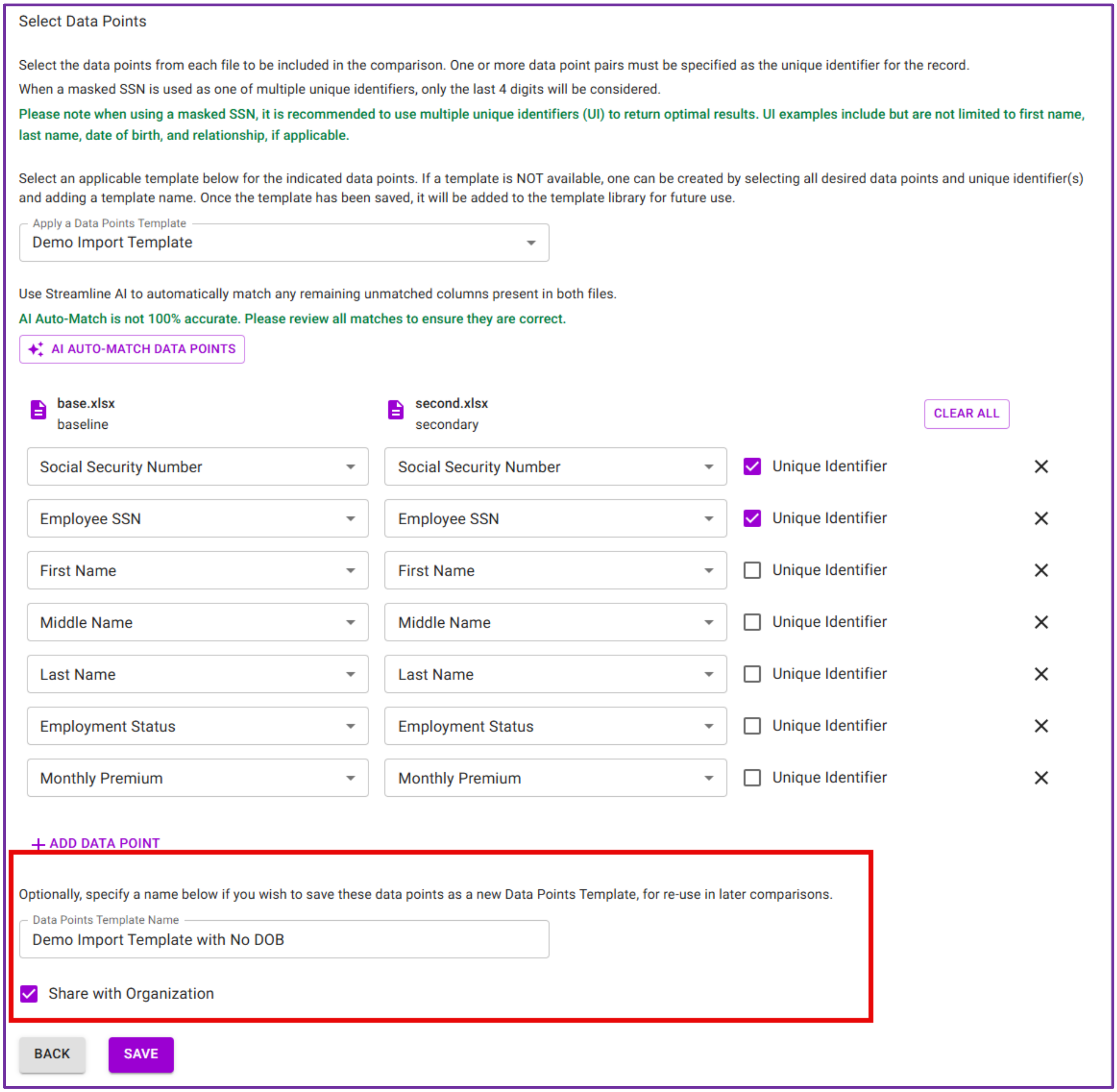
Select an applicable data points template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the import file column names. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding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

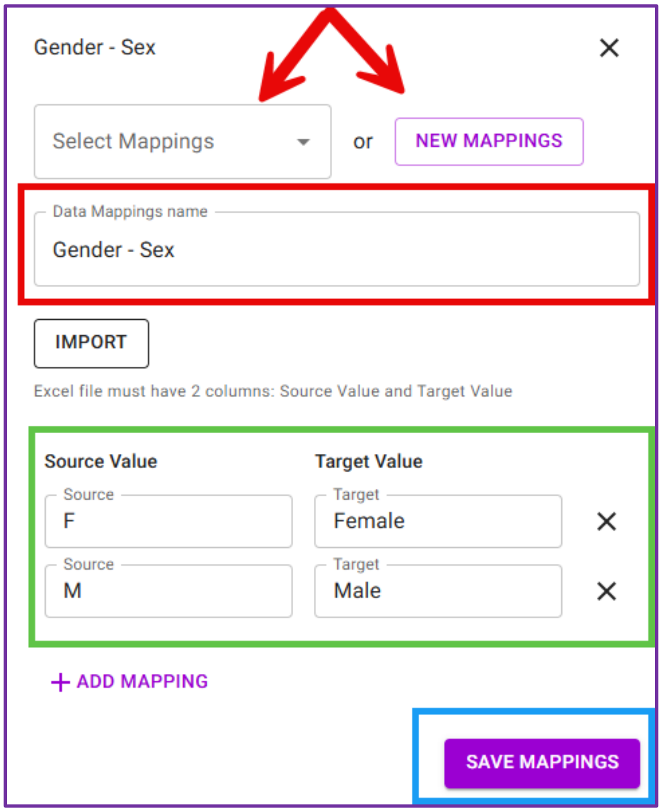
Mappings can be created several ways.

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

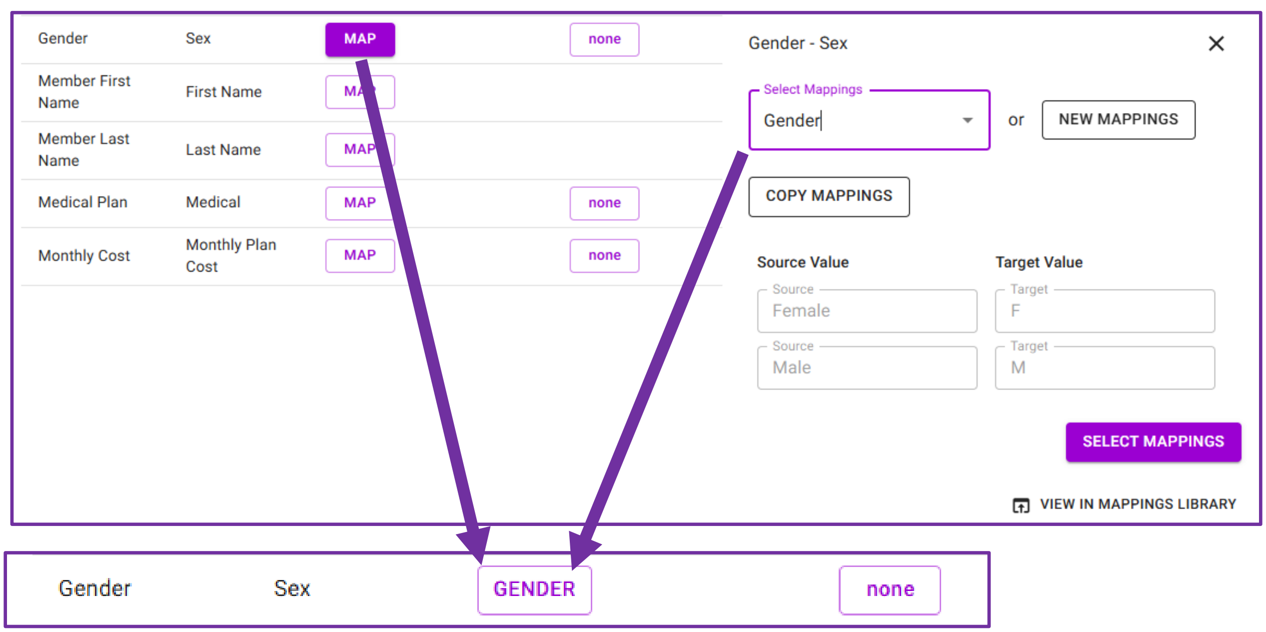
To Manually create a mapping:

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.



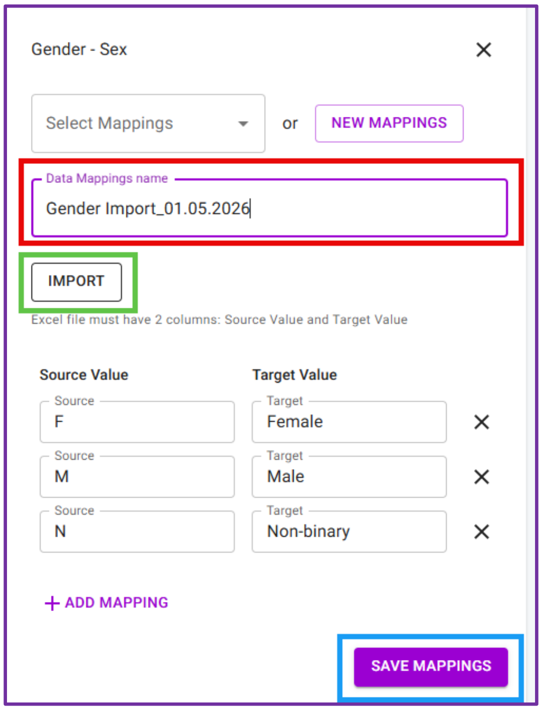
If you use existing mapping, click SELECT MAPPINGS.



To Import a mapping:

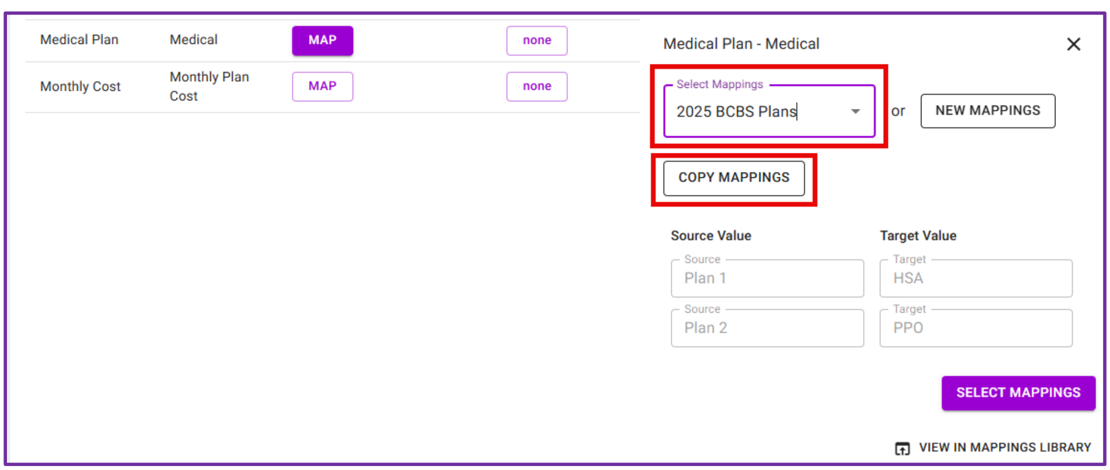
To add a new mapping, click **New Mappings**. Enter a mapping name, then select **Import**.
The import file may be a single-sheet Excel file or a CSV file. If you are using an Excel file with multiple sheets, the mapping **must** be on the first tab—otherwise, the import will fail.

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



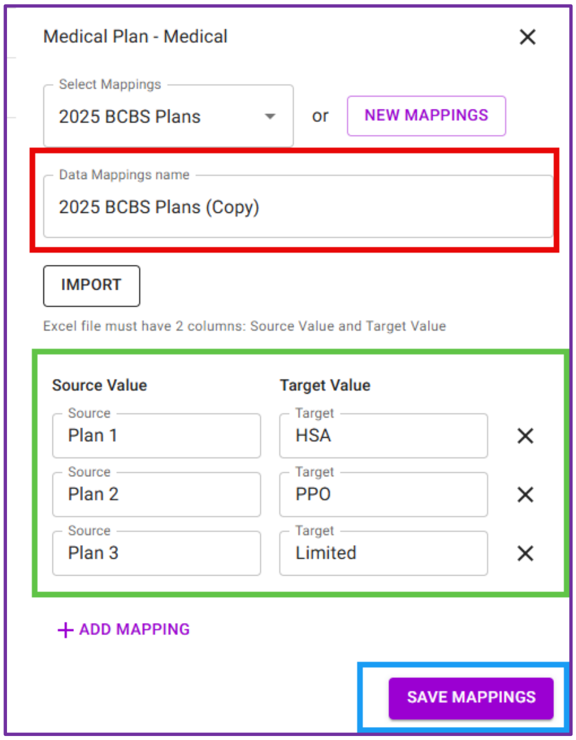
To Copy and modify an existing mapping:

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

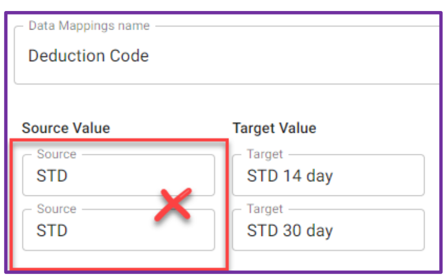


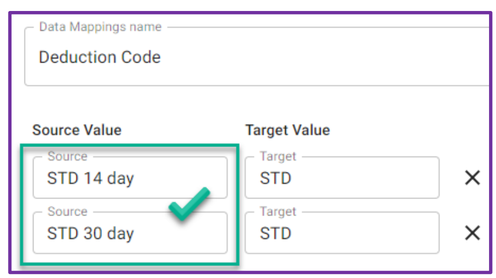
This creates a duplicate of the mapping with **(copy)** added to the name. You can then rename the mapping and add, update, or remove any source or target values as needed.

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



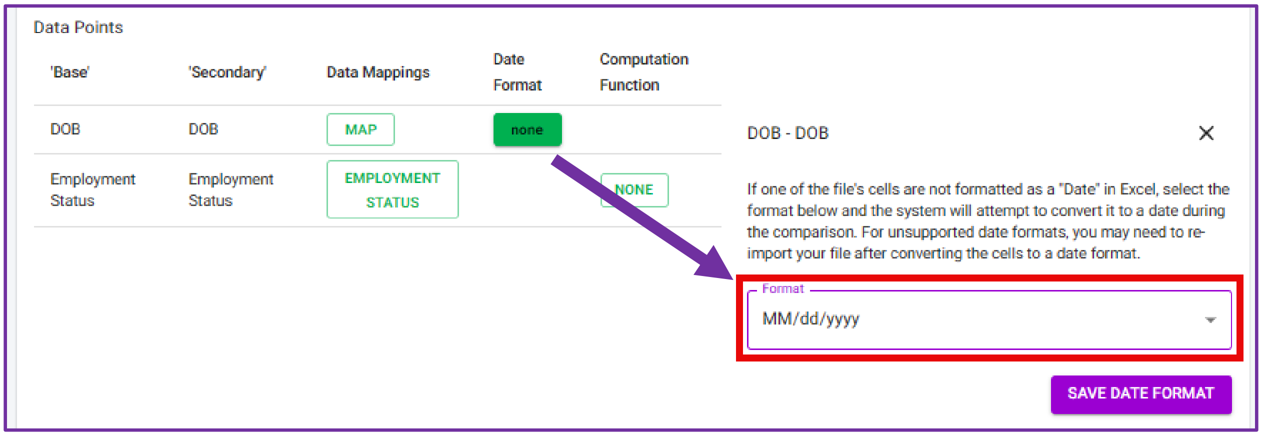
NOTE: The **SOURCE VALUE** in mapping must be unique. If the same value is used more than once under **SOURCE**, an error will occur. However, it is acceptable to use the same **TARGET VALUE** multiple times.





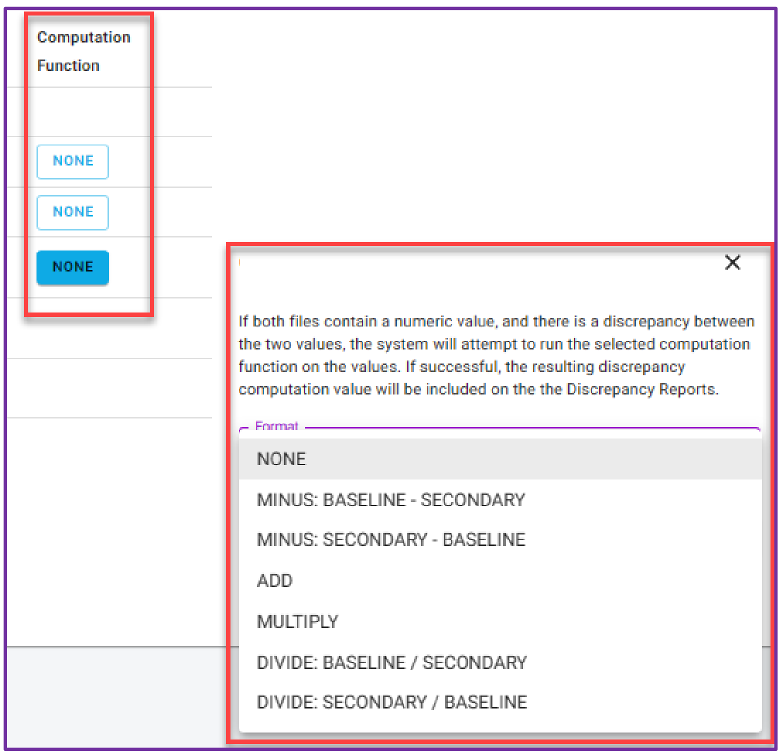
Mapping – Date Format

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

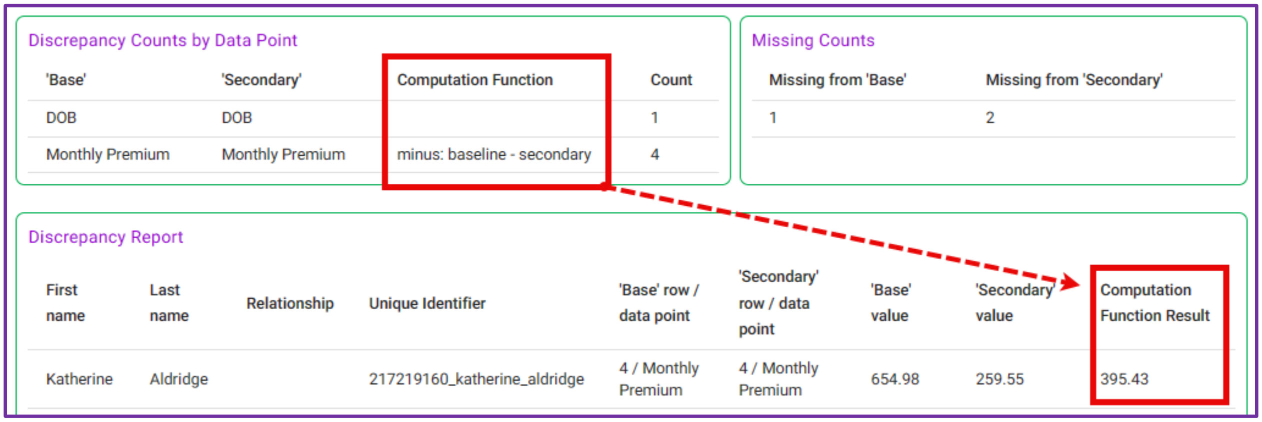
Add a computation (subtraction, addition, multiplication, division) to any numeric data point from the baseline file to any numeric data point in the secondary file. Add the computation by clicking the button under the Computation Function column for the desired data points and then selecting the function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

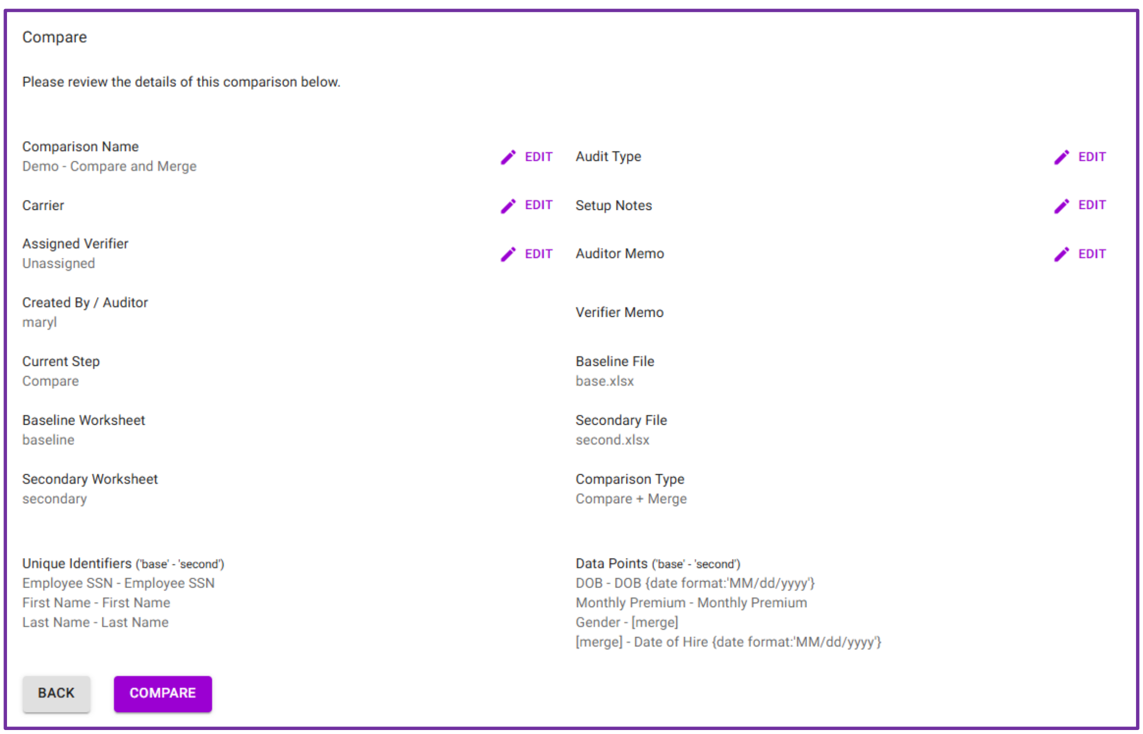
Missing from 'Base'	Missing from 'Secondary'
1	2

Discrepancy Report

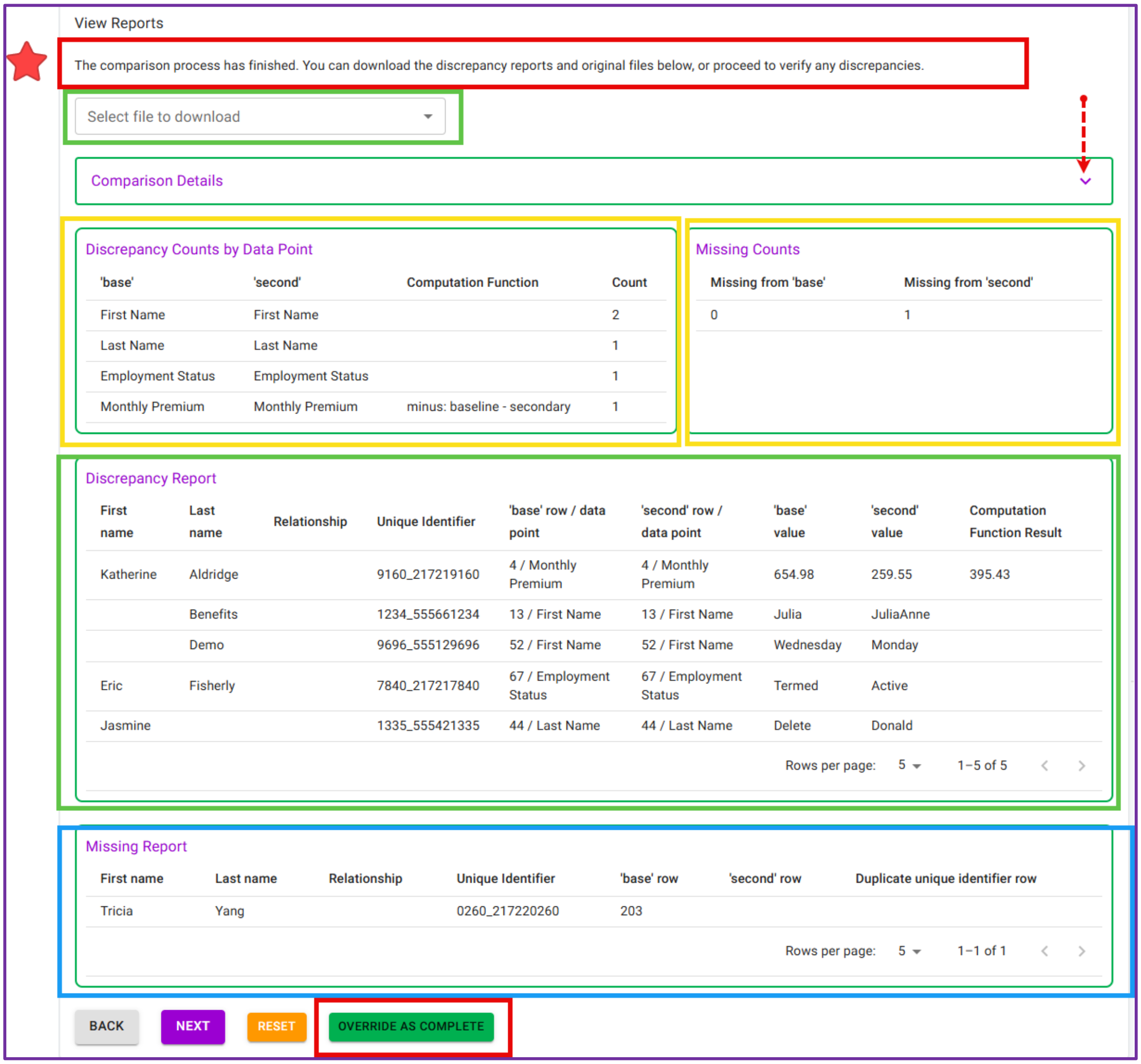
First name	Last name	Relationship	Unique Identifier	'Base' row / data point	'Secondary' row / data point	'Base' value	'Secondary' value	Computation Function Result
Katherine	Aldridge		217219160_katherine_aldridge	4 / Monthly Premium	4 / Monthly Premium	654.98	259.55	395.43

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.

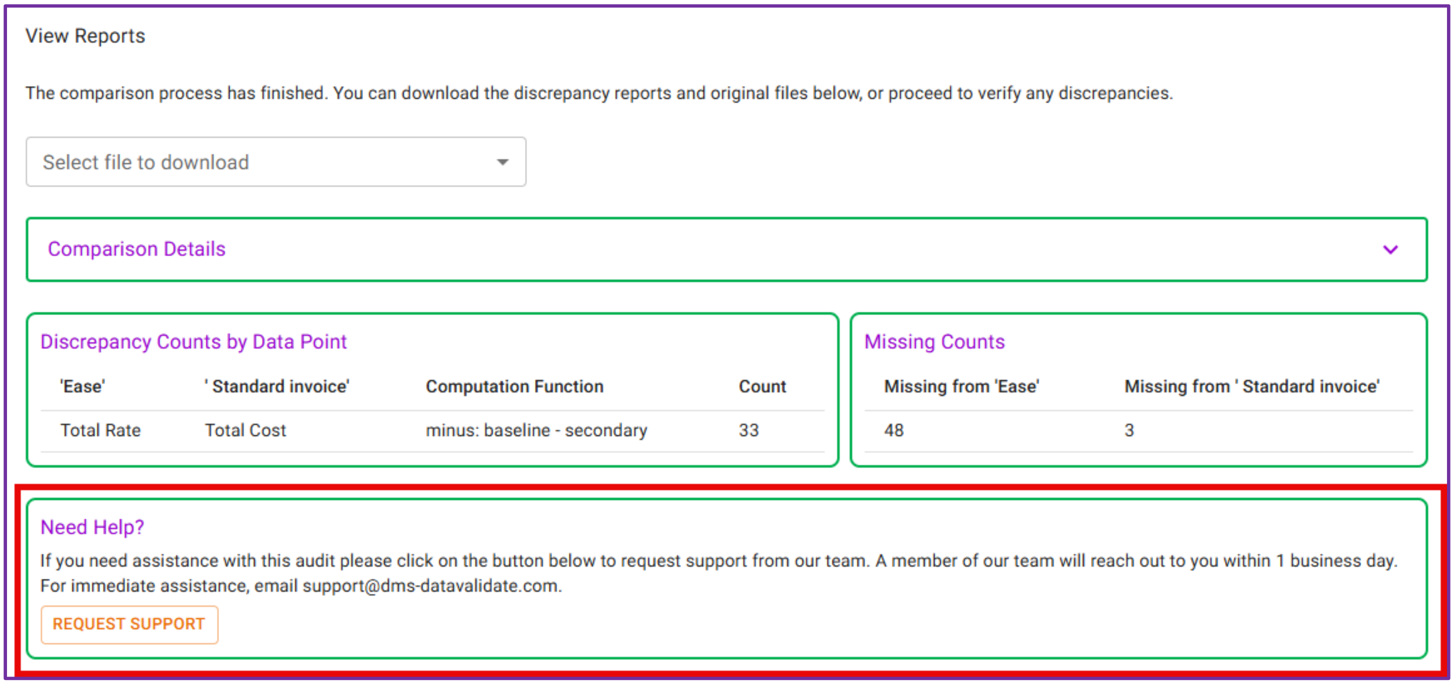


We've introduced a **Request Support** option on **Step 5 – Compare** for audits that return more than 30 discrepancies and/or missing items. This option appears only when that threshold is met.

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.

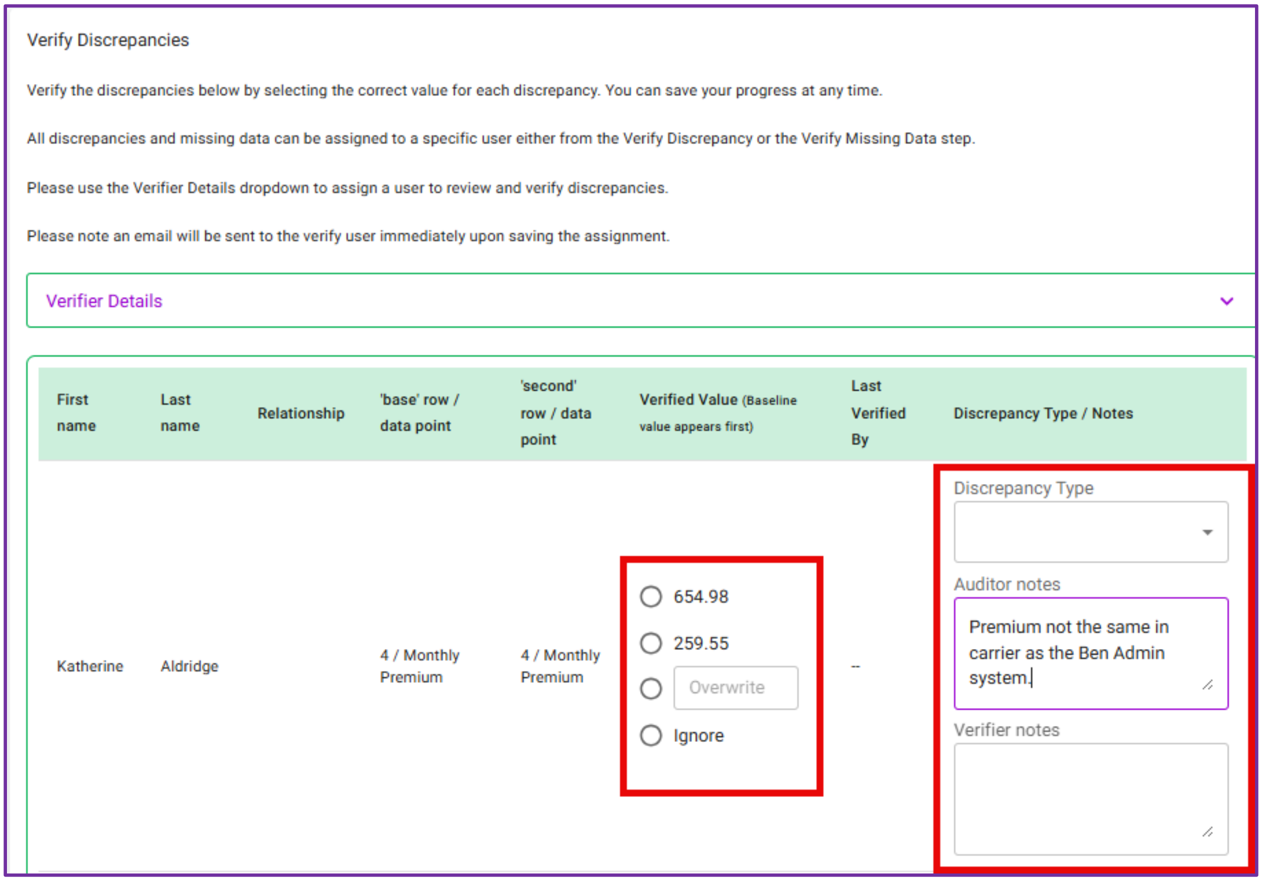
Please note that the **Streamline Support Team** is always available, regardless of audit results. If you need assistance at any time, you can contact us at **support@dms-datavalidate.com**.

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 comparison, the audit must be reset to a previous step. If the audit still contains more than 30 discrepancies and/or missing items after reset, the **Request Support** option will become available again.

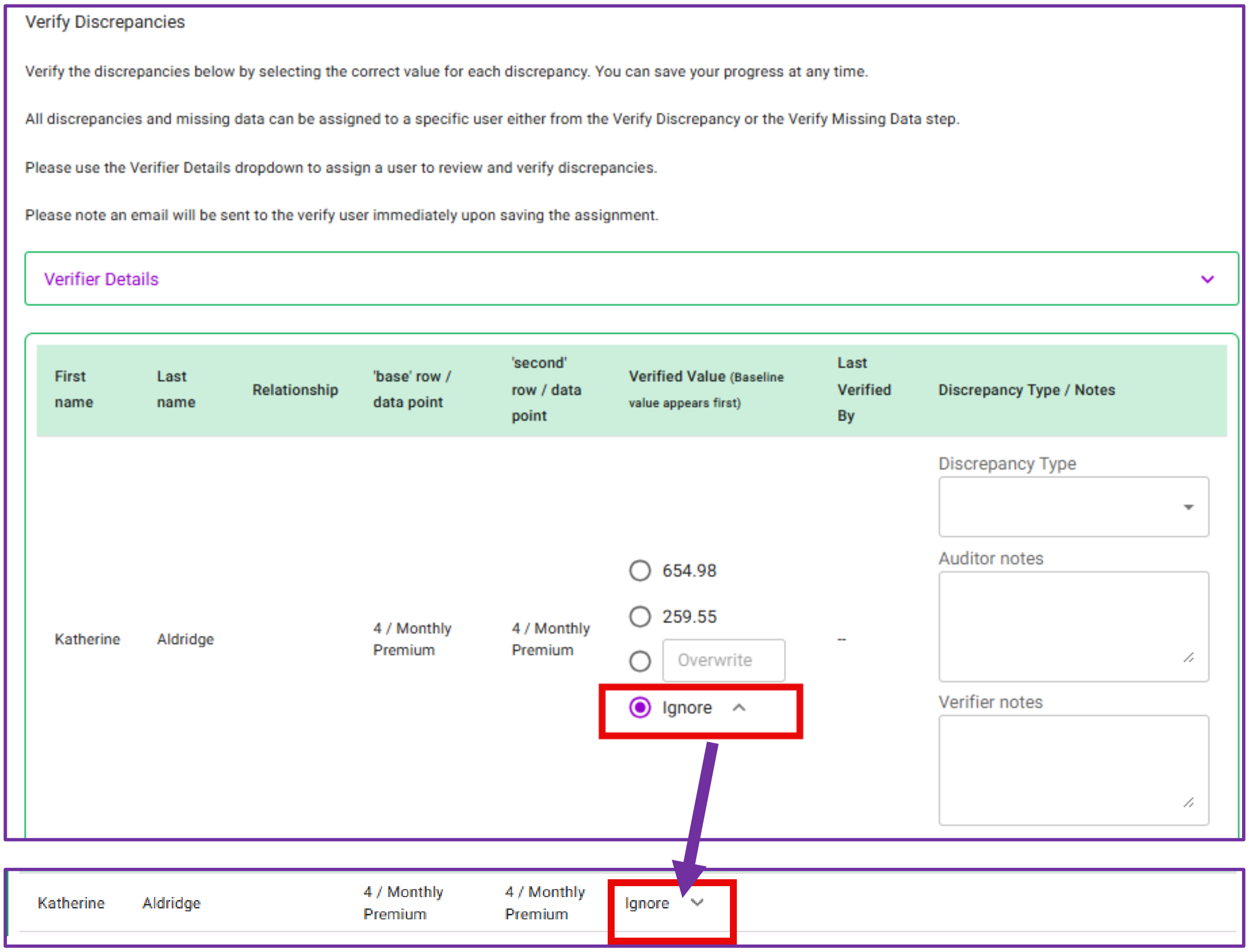


Verify Discrepancies

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.

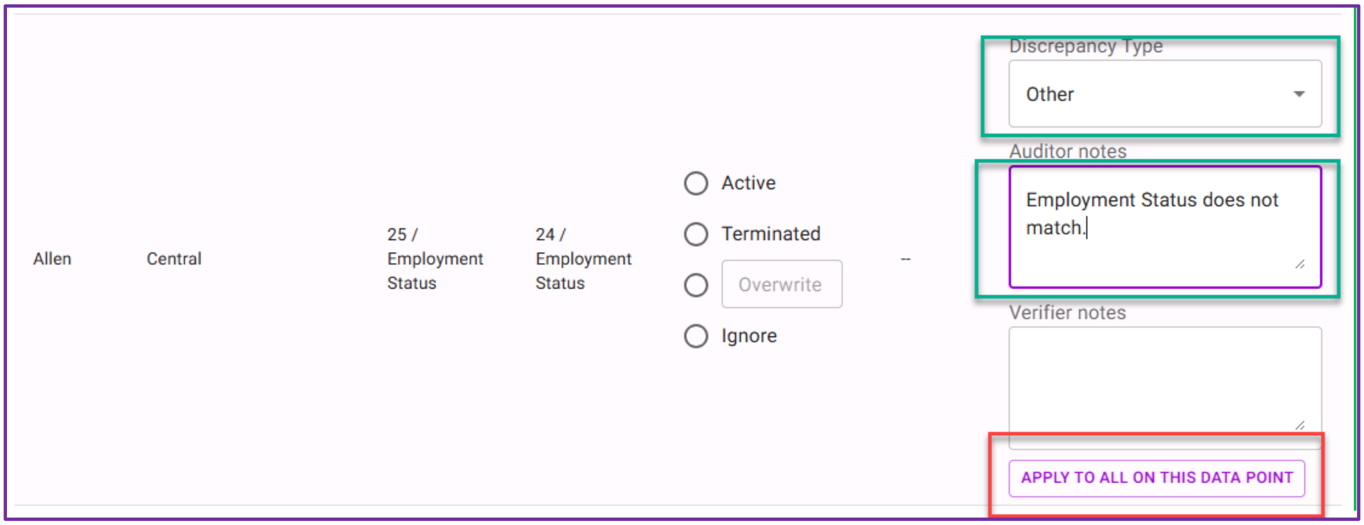


If the discrepancy is not a true discrepancy or if the verifier desires to ignore it, select IGNORE. Any discrepancy marked as IGNORE, can be minimized by clicking the caret (^)

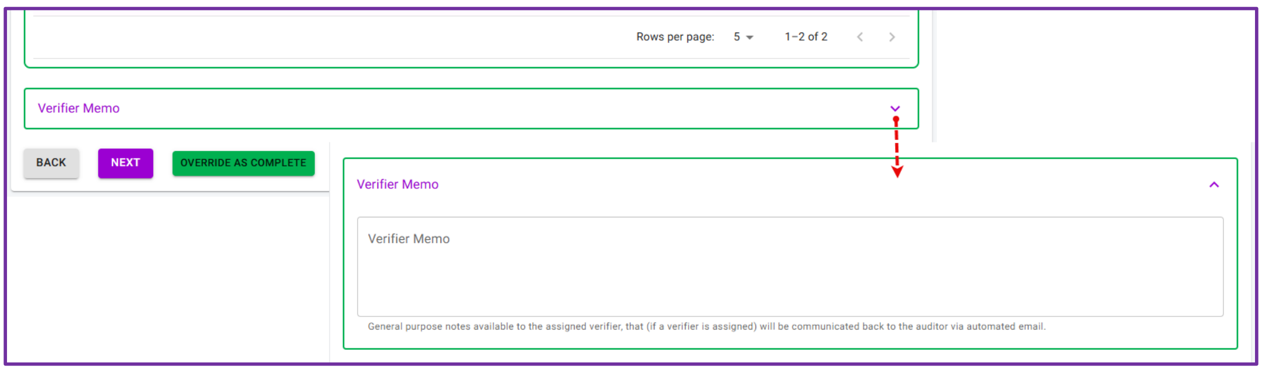


You can now use the **Apply To All On This Data Point** feature to update matching data points. When selected, the chosen discrepancy type and any auditor notes will automatically be applied to all occurrences of the same data point. Please note that the **Apply To All** will overwrite any existing discrepancy types or notes for those matching occurrences. **This feature is available only in Step 6: Verify Discrepancies.**

In the example below, the Apply To All feature is used on the Employment Status data point. As a result, the Discrepancy Type of Other and the Auditor Note, *"Employment Status does not match,"* will be applied to every Employment Status data point in the comparison.

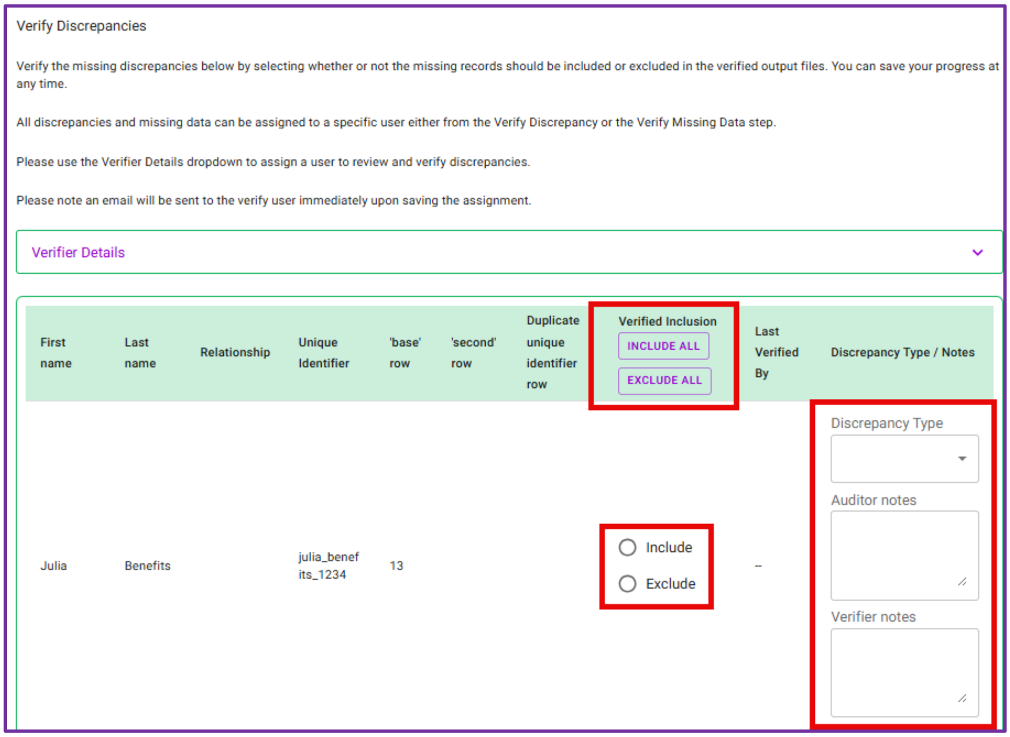


Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.



Verify Missing

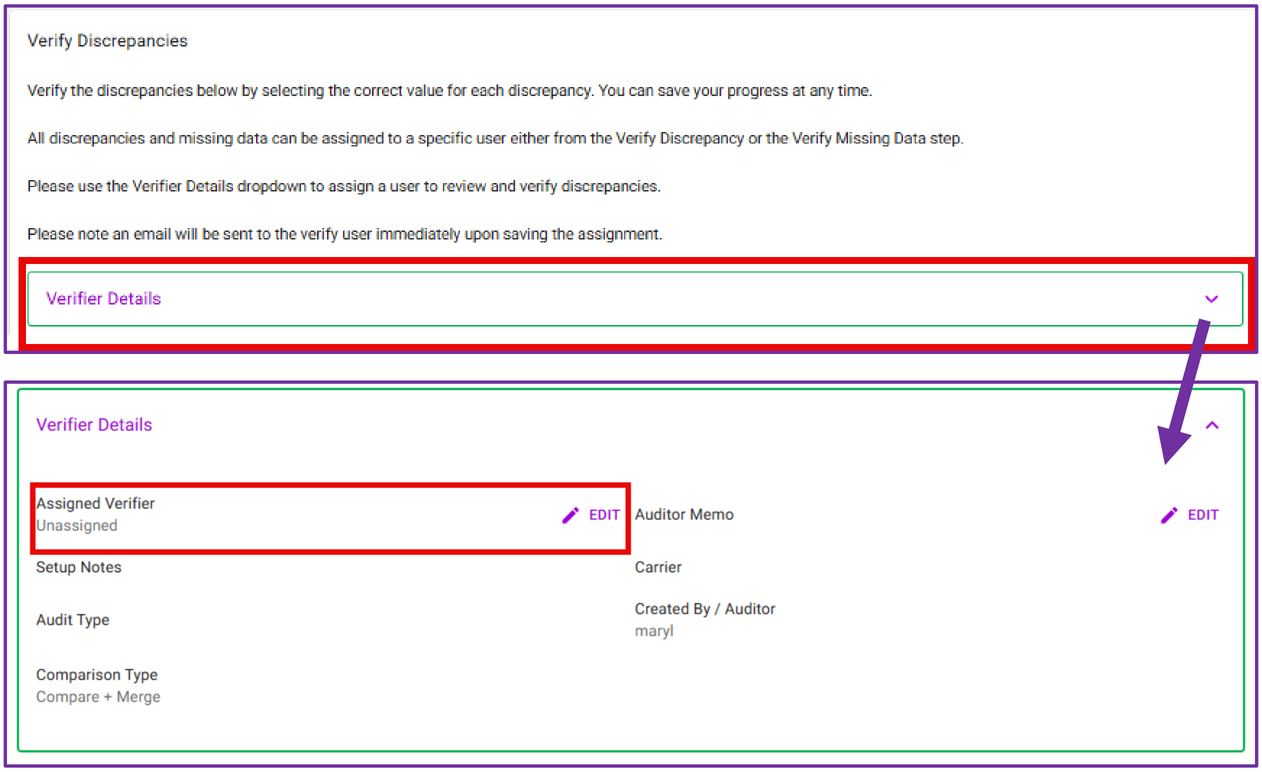
Verify Missing Data entries are identified by the system when the unique identifier from one file cannot be found in the other. If the entry needs to be included, check Include? For a shortcut, click INCLUDE ALL or EXCLUDE ALL to select/deselect all entries. If INCLUDE is selected, the entry will be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

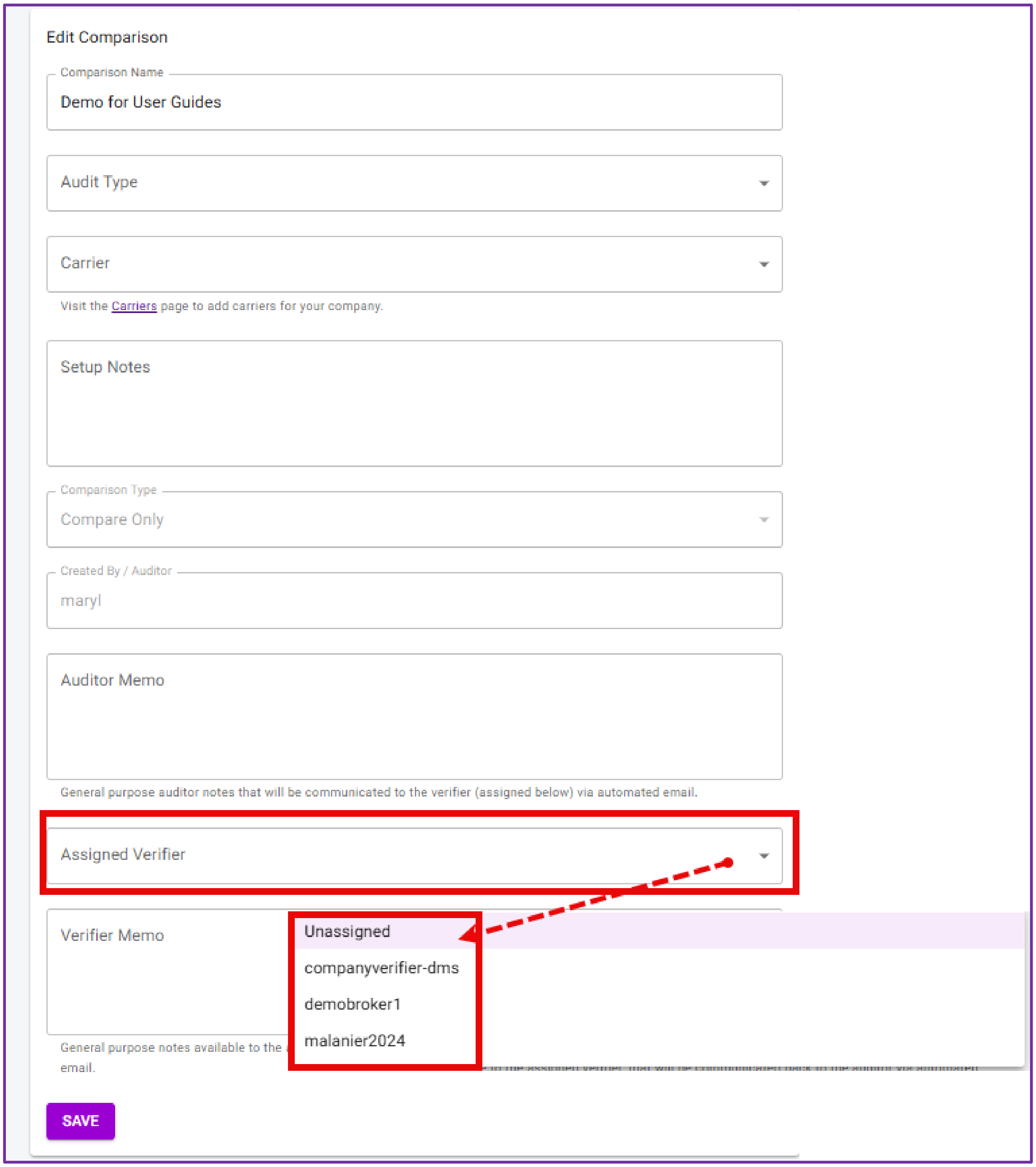
A verifier can be assigned to complete the comparison. To assign a verifier, select the Verifier Details dropdown. In the Verifier Details section, select the EDIT option for Assigned Verifier.



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.**

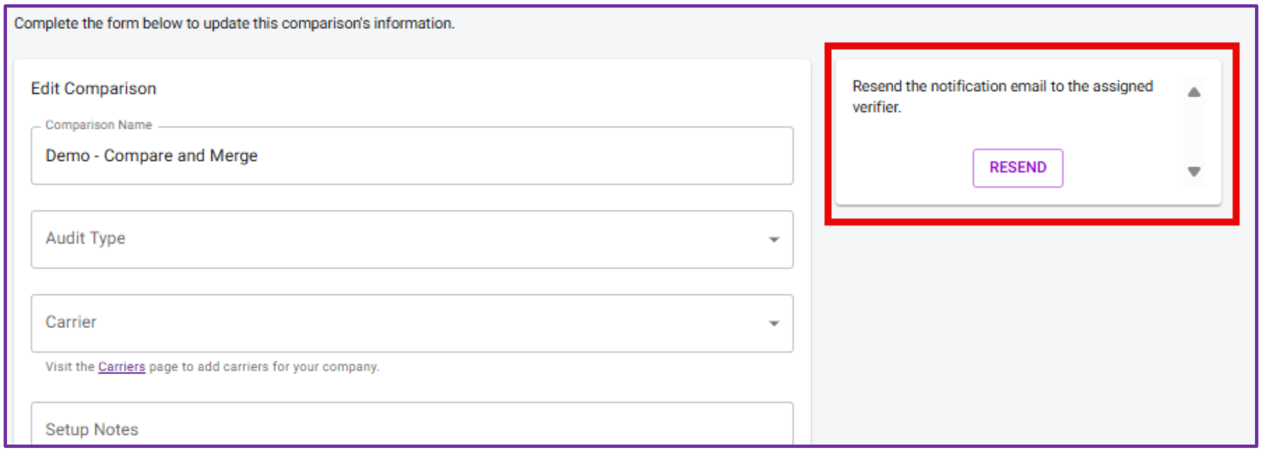
A notification email containing Auditor name, Organization/Company Name, Audit Name, and a link to the specific audit is generated once a verifier has been assigned.

> 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.



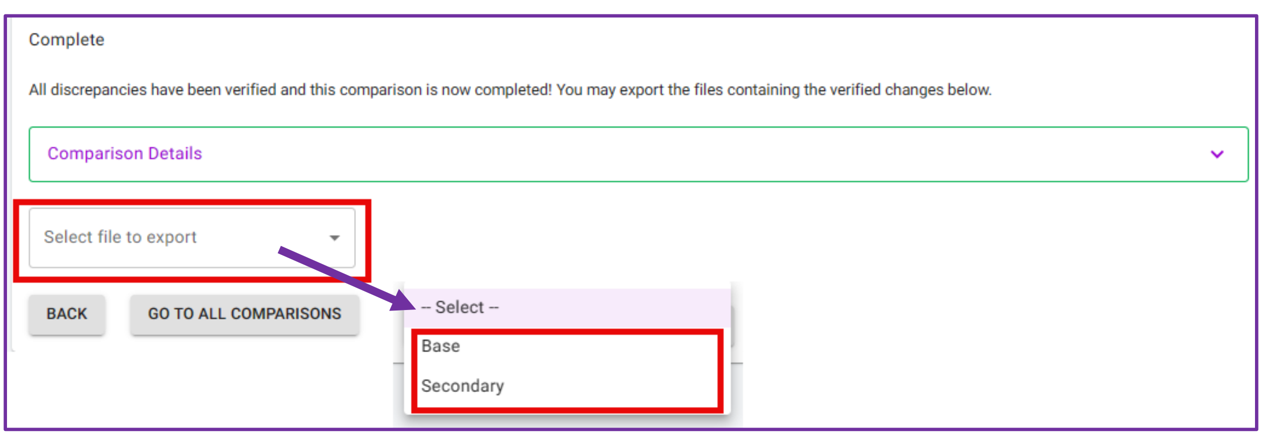
Complete the Compare

Data verification is complete.

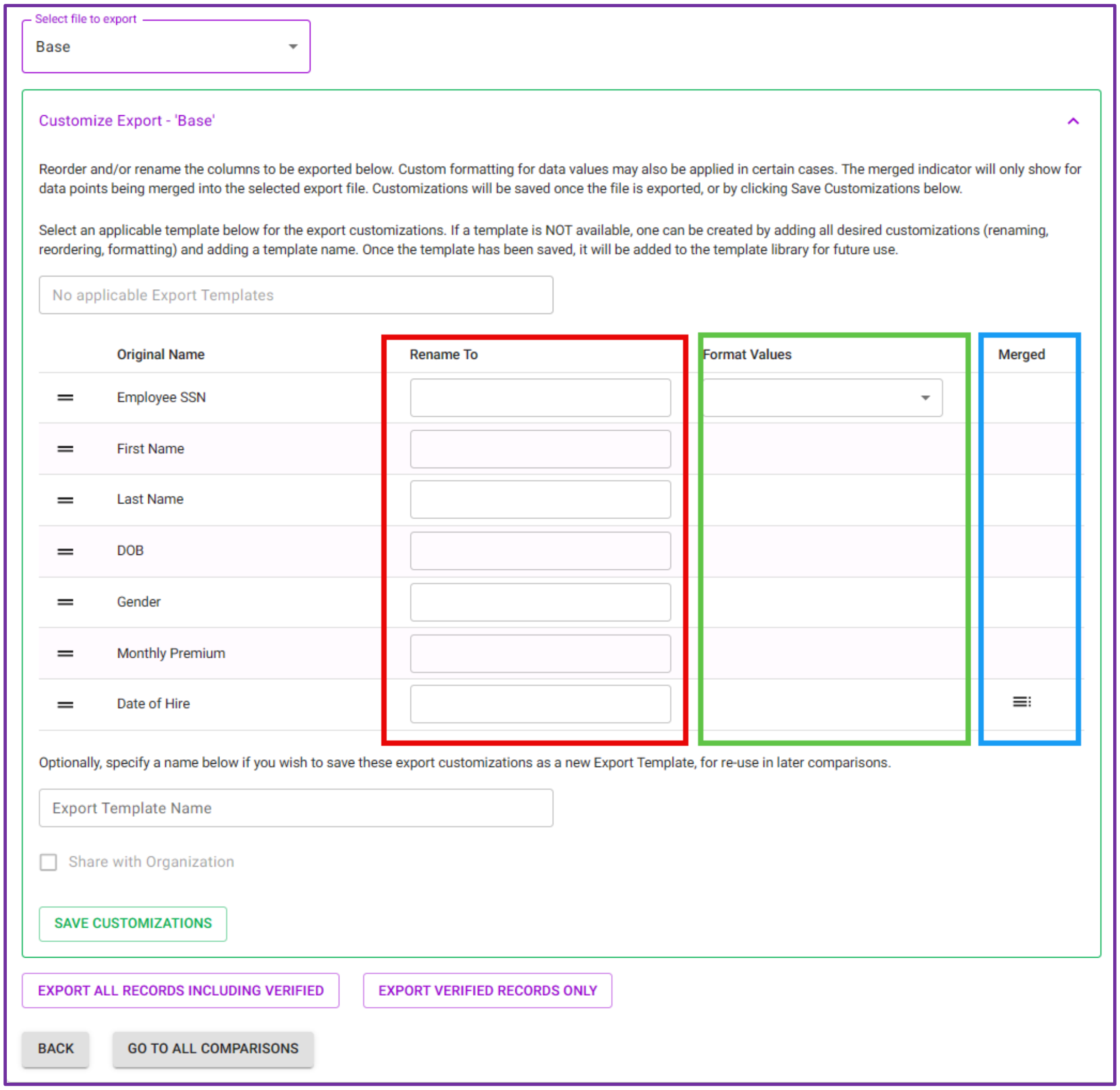
If the audit was assigned to a specific user within the application, the auditor will receive a notification email that the audit is complete.

> 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.

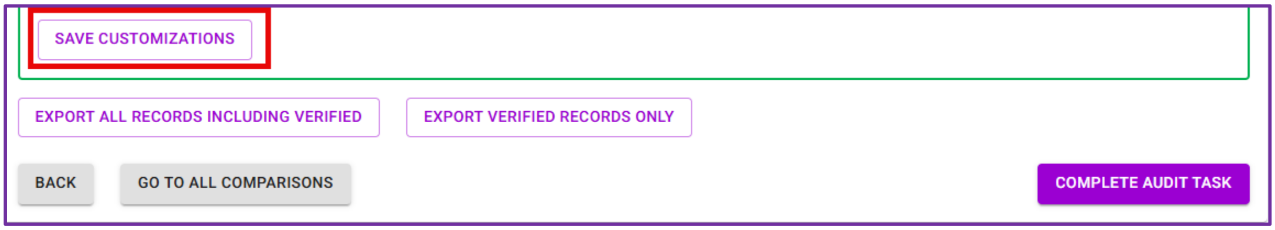


Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the application's key words. For a list of the keywords, please reference the Key Words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



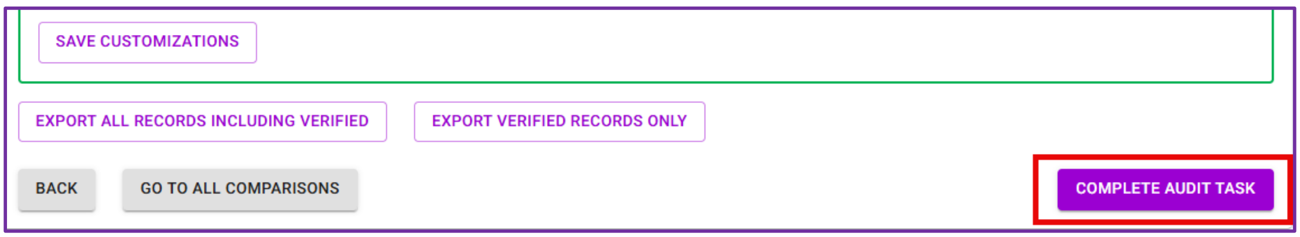
Column names can also be reordered by dragging and dropping data point in desired location.

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.

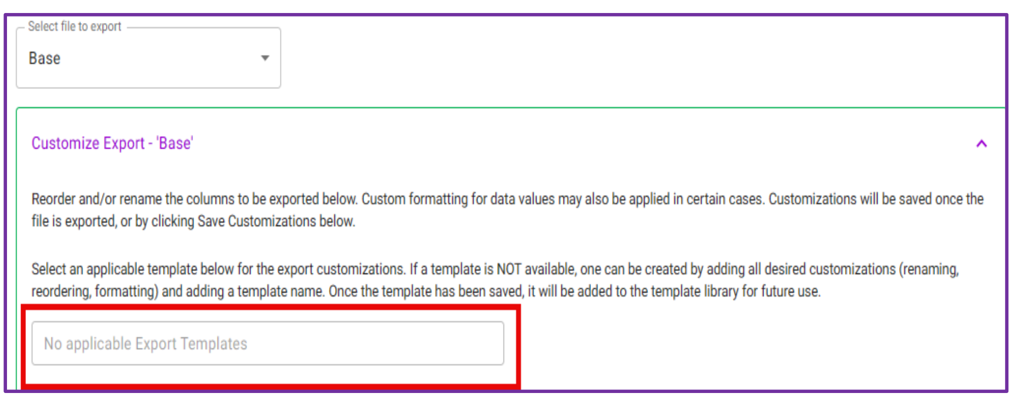


Export Template

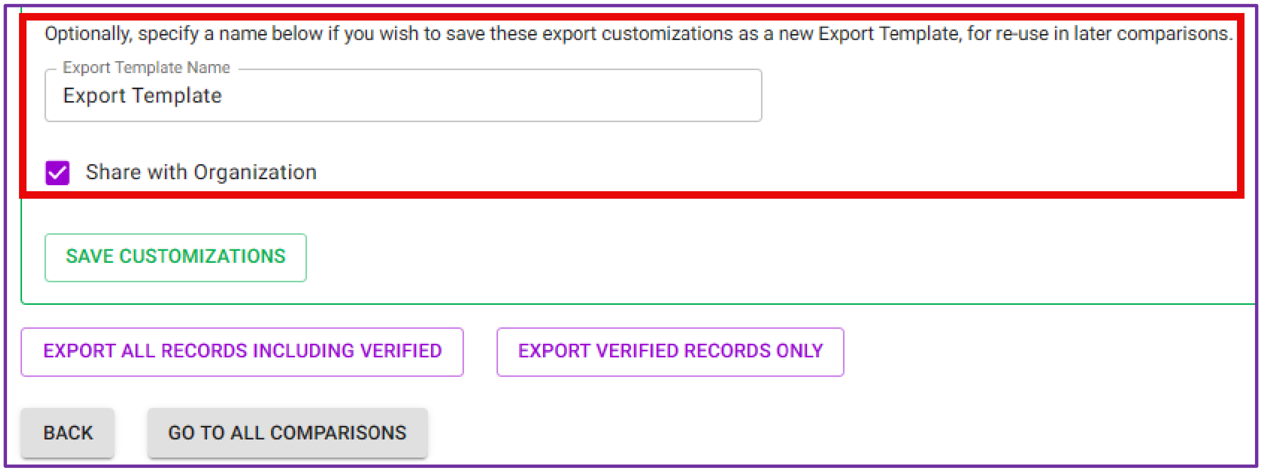
Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming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

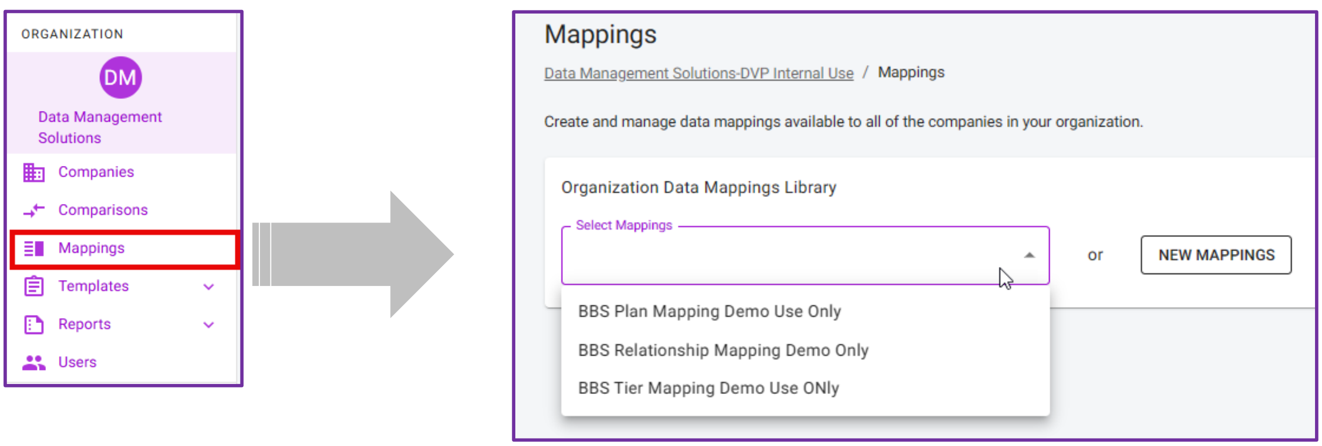
Questions: Contact Support@dms-datavalidate.com

Create Organization Level Mapping

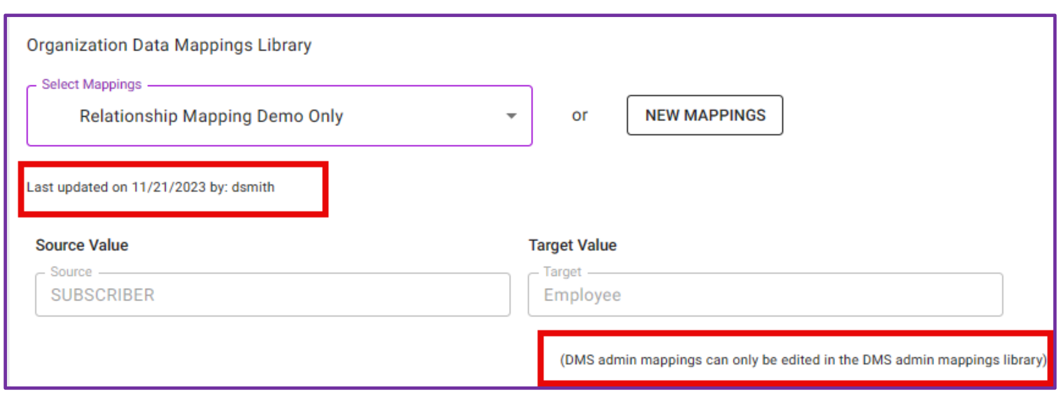
The Streamline application offers Organization Level mapping that can be used across multiple companies. This eliminates the need to create duplicate mappings such as coverage tier and relationship per company.

MAPPINGS under Organization Menu

New Mappings created at the Organization Level are automatically available to all companies within the organization.



The mapping creation level as well as when and who updated the mapping will be indicated below the mapping. Mappings can only be edited/deactivated/deleted at the creation level.



NEW MAPPINGS

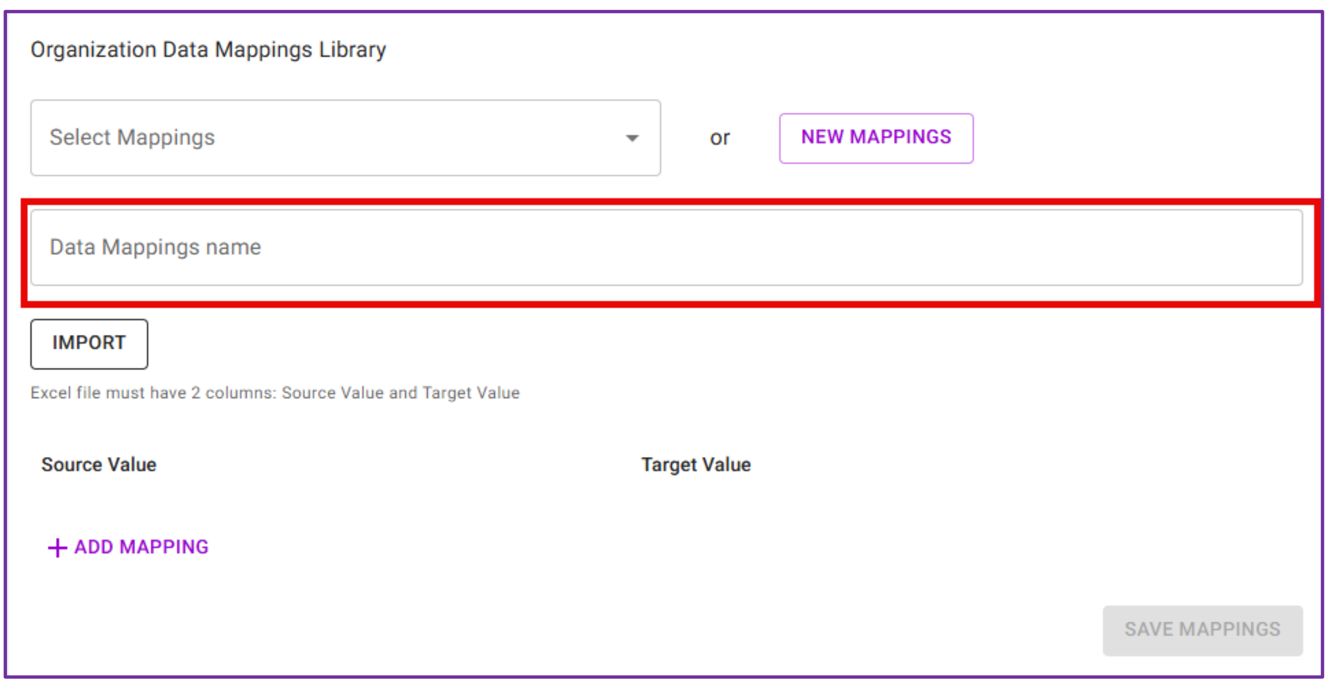
This begins the mapping creation process. Add customized mapping for data such as plans, tiers, or departments by utilizing the NEW MAPPINGS button. Existing mappings for the company or created and shared at the Organization level can be re-used or new mappings can be created.

Mappings can be created several ways.

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

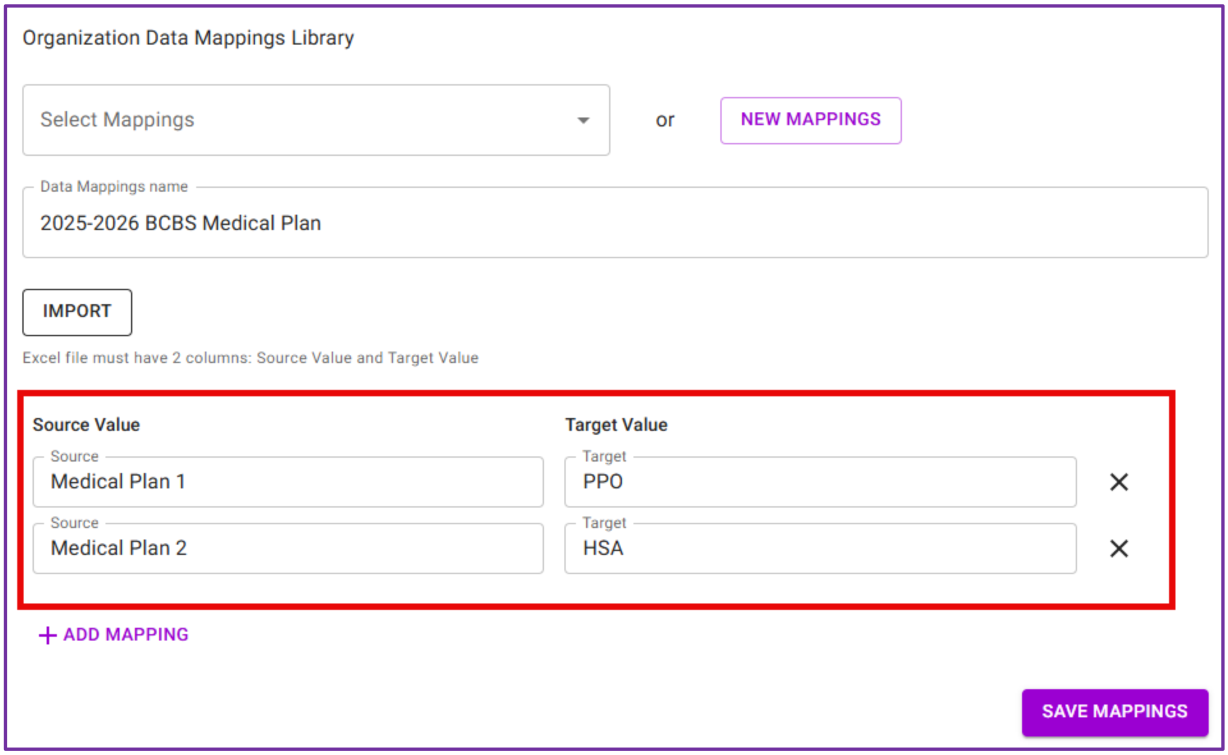
Name Mapping

Add an easily identifiable and relevant mapping name. Best practice is to use the data points in the mapping name. For example: BCBS Coverage Tier – EN Coverage Tier. Try to avoid names such as Mapping #1.



Manually Create a Mapping

Enter the Source and Target Values. This allows the system to convert the values and eliminate the need to manually change the values in the files. Once all values have been added, click SAVE MAPPINGS.



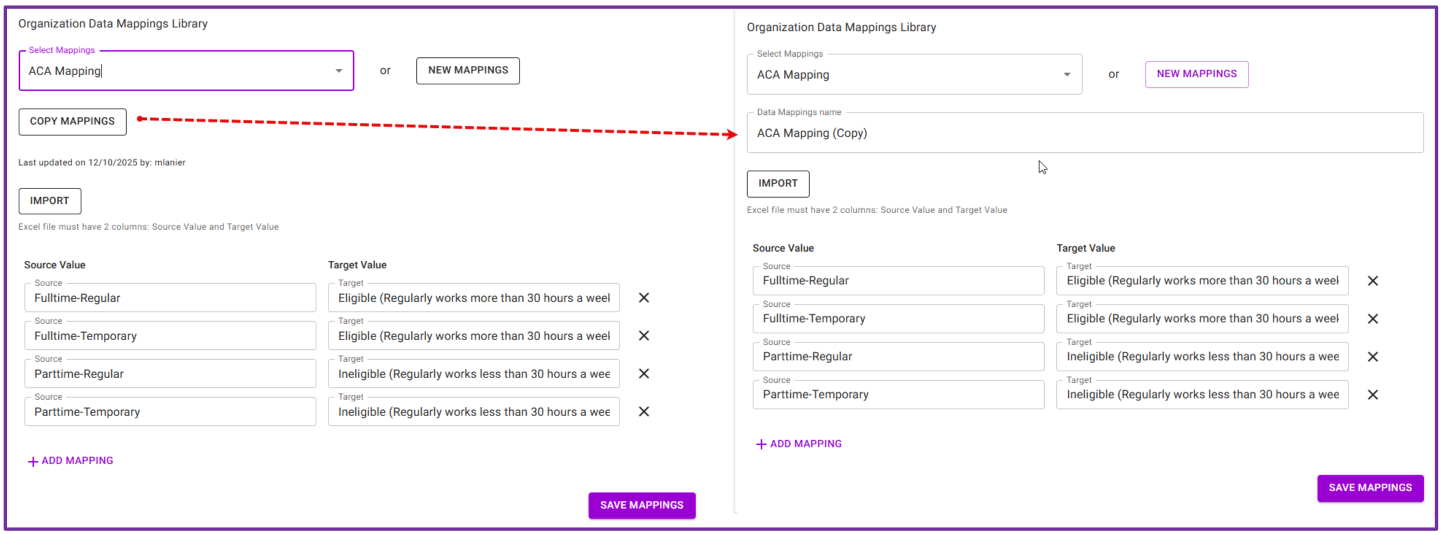
Import a Mapping

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.

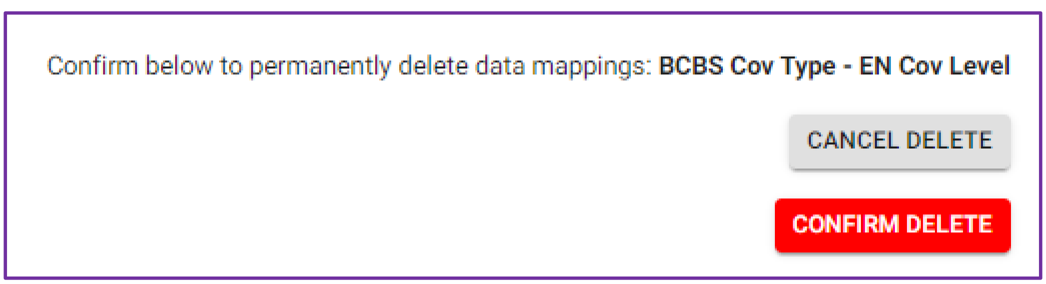
Copy and Modify an Existing Mapping

To reuse an existing mapping, search for it in the Select Mappings dropdown. Once selected, click Copy Mappings. The name is appended with (COPY). Rename and make any needed adjustments to the source and target values. Click SAVE MAPPINGS to save the copied mapping.

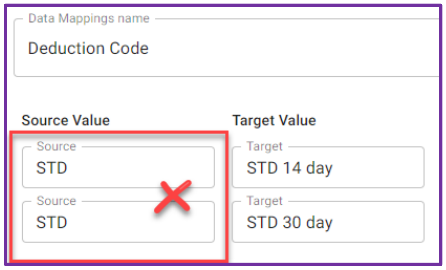


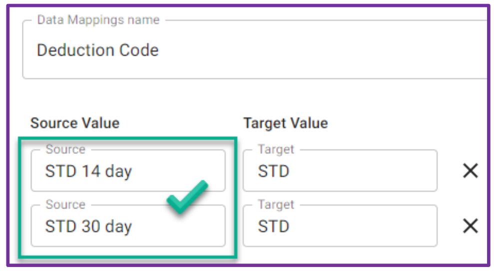
***If a mapping is currently in use, it cannot be deleted or edited.

***Deleted mappings are permanent and cannot be reversed.



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.





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.

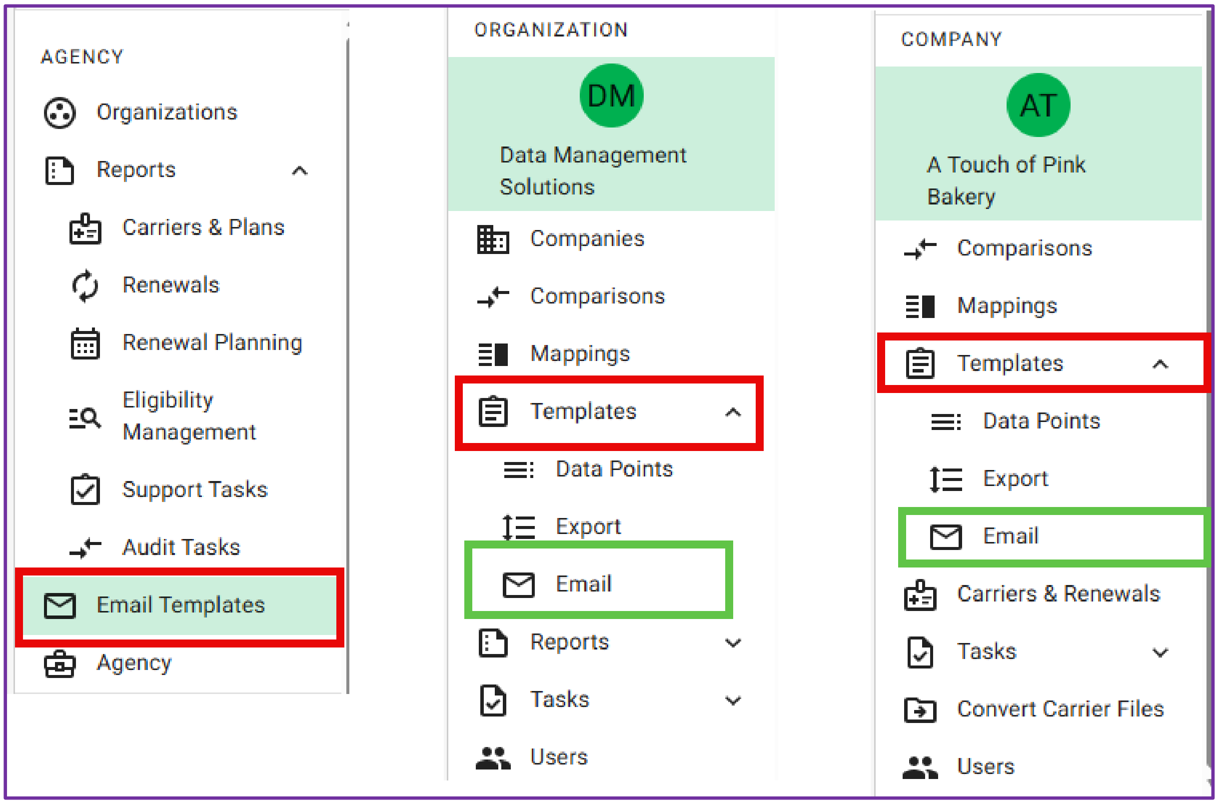
PLEASE NOTE: Any data point and export template shared with an organization and created by an organization administrator, or an organization compare user can be utilized under any company within that specific organization. Company admins which are available under our Platinum Elite subscription will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

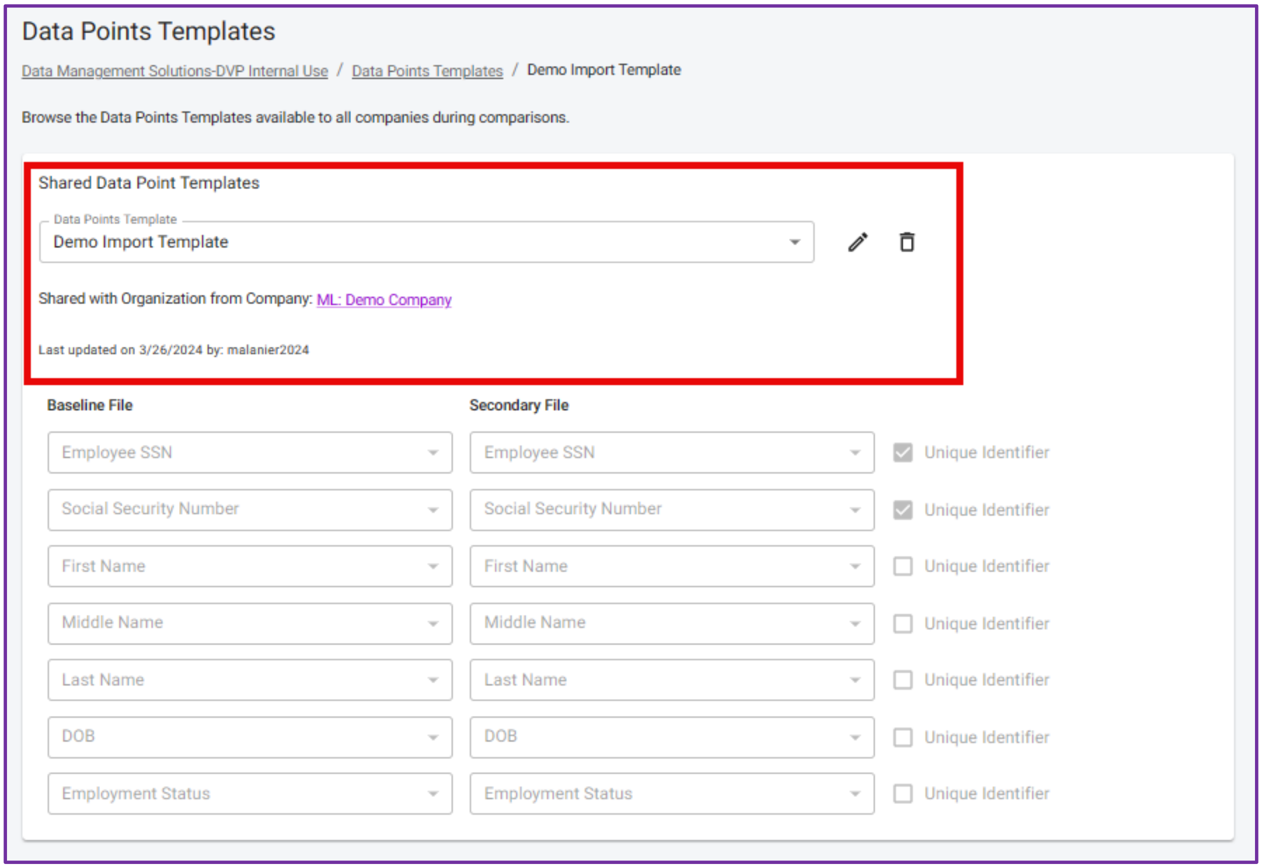
The email template library contains the default system generated emails for both the auditor and the verifier on both the organization and company levels. Please note that Email customization is only available on the Platinum Elite and Subscription Based Audits plans.

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

Adding and Removing Companies

Companies can be added or deactivated in the application as needed by the subscriber. A company export file for your specific organization is also available and will include the following fields:

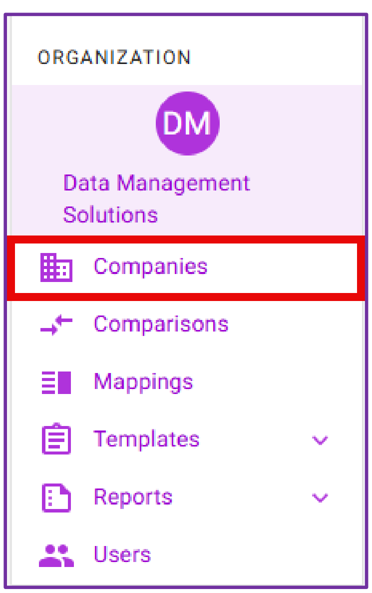
- Company name
- Active status
- Updated at timestamp
- Termination date and reason
- Activation date
- First demo date
- Any associated notes

Please note that only Organization Admins have the ability to deactivate a company.

Import Companies

The Streamline application provides the option to import companies into an organization as well as adding them manually. Using the provided import template, all companies can now be easily added to eliminate manual entry.

Companies can be imported into an organization by selecting Companies in the Organization menu.

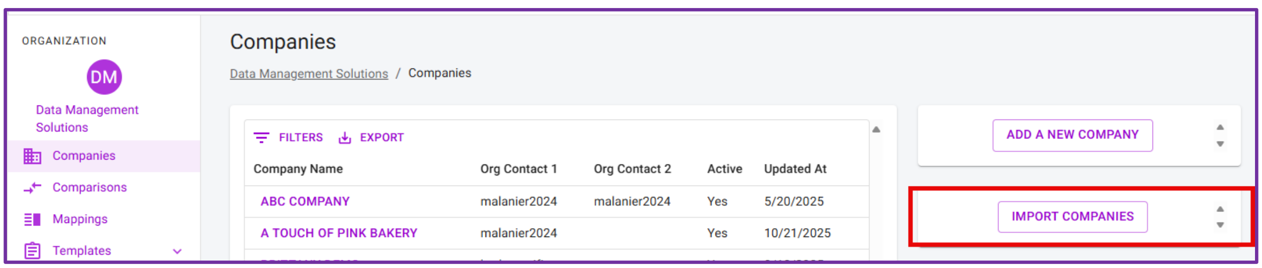


Using the provided import template, complete the following fields:

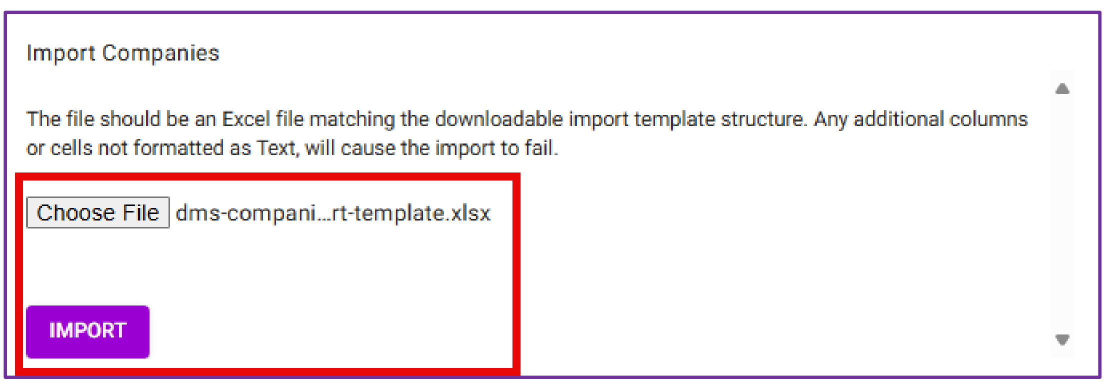
- Company name (Required)
- Notes (Optional)
- First demo date (Optional)
- Activation date (Optional - effective date of company in the application)
- Primary Organization Contact Username (Optional)
- Secondary Organization Contact Username (Optional)
- Organization Benefit Admin System (Optional)

  Note: The Organization Benefit Admin System must already exist under the organization for the import to succeed.

Including any additional columns will cause the import to fail.

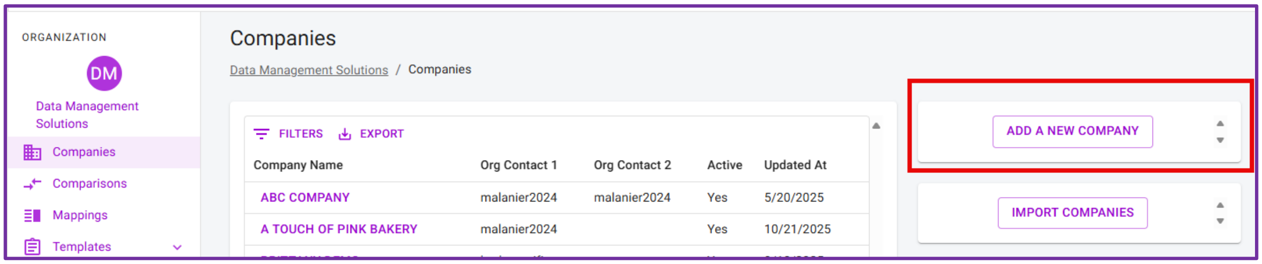


Choose file and click IMPORT.



Manually add a Company

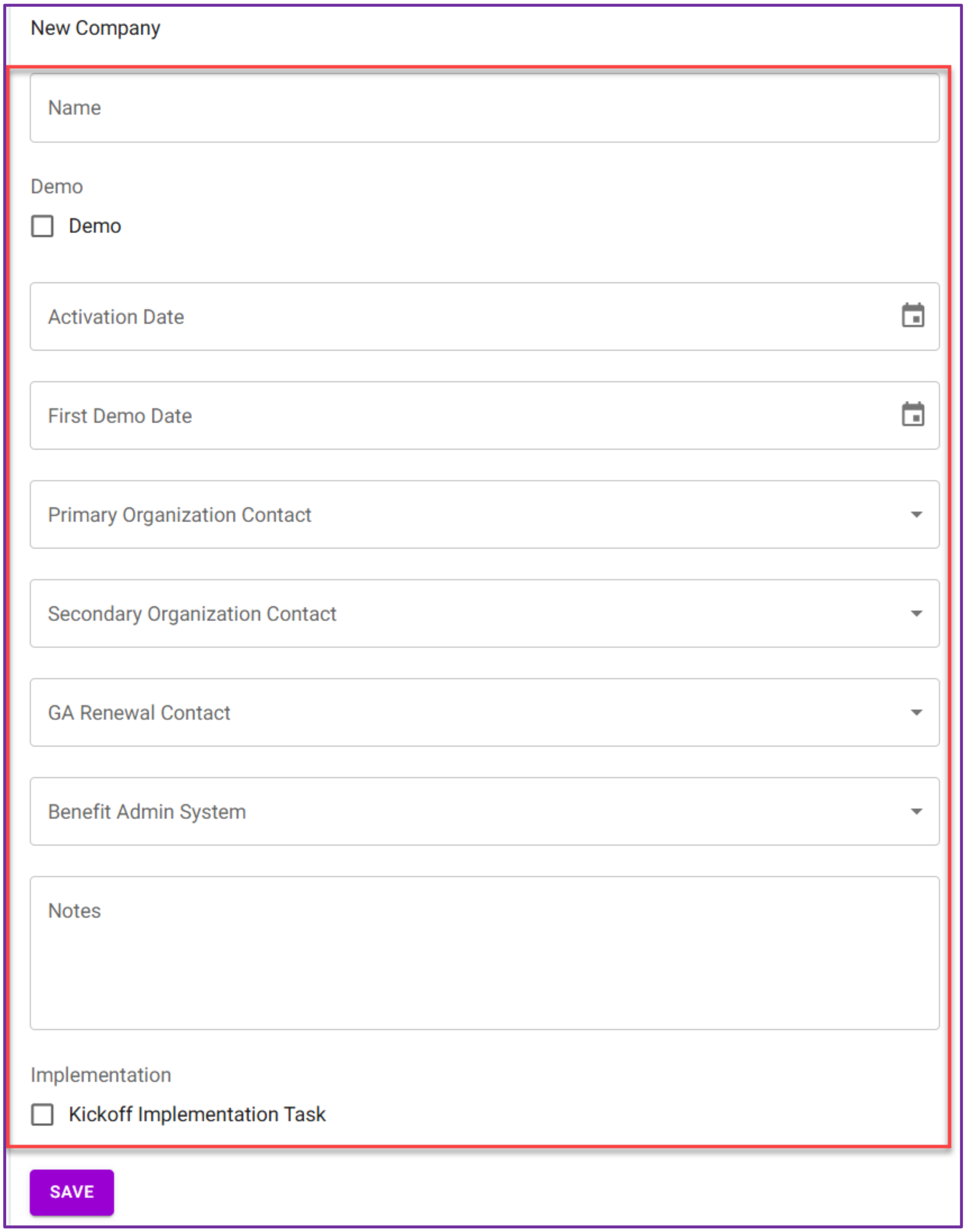
A company can be manually added to the application by clicking COMPANIES in the left-hand menu and then ADD A NEW COMPANY.



Add the following:

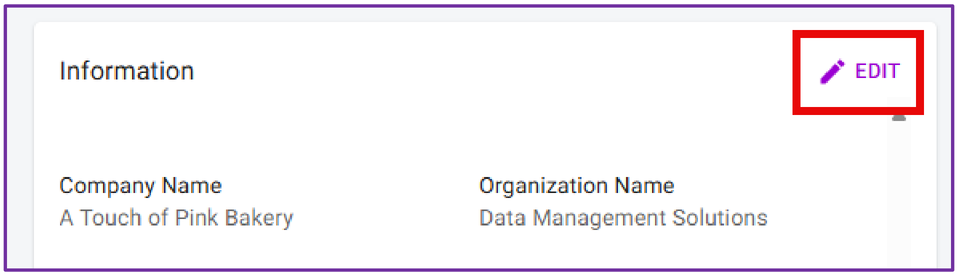
- Company name (Required)
- Demo - check if the company is a demo and to be excluded from exports.
- Activation date (Optional - effective date of company in application)
- First demo date (Optional)
- Primary Organization Contact (Optional – select from available dropdown. Only Admins and Comparers are included)
- Secondary Organization Contact (Optional – select from available dropdown. Only Admins and Comparers are included)
- GA Renewal Contact (This field is only available to DMS/Agency application users)
- Benefit Admin System (Optional - select from available dropdown)
- Notes (Optional)
- Kickoff Implementation Task – check if you would like to begin the Client Implementation Wizard. (Optional – The kickoff can be selected later if desired)

Once all information has been added, click SAVE.

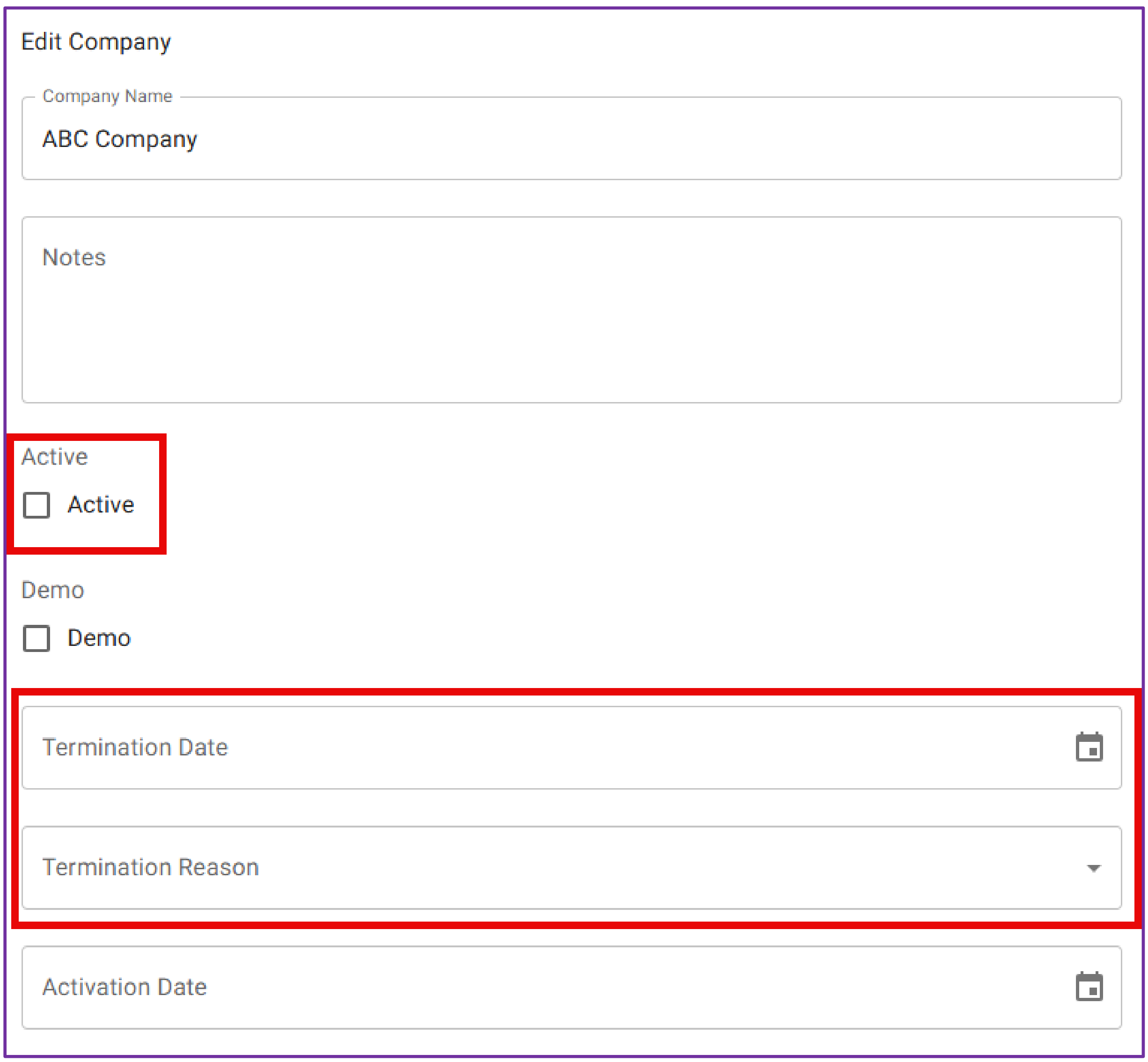


Deactivate a Company

To deactivate a company, click EDIT

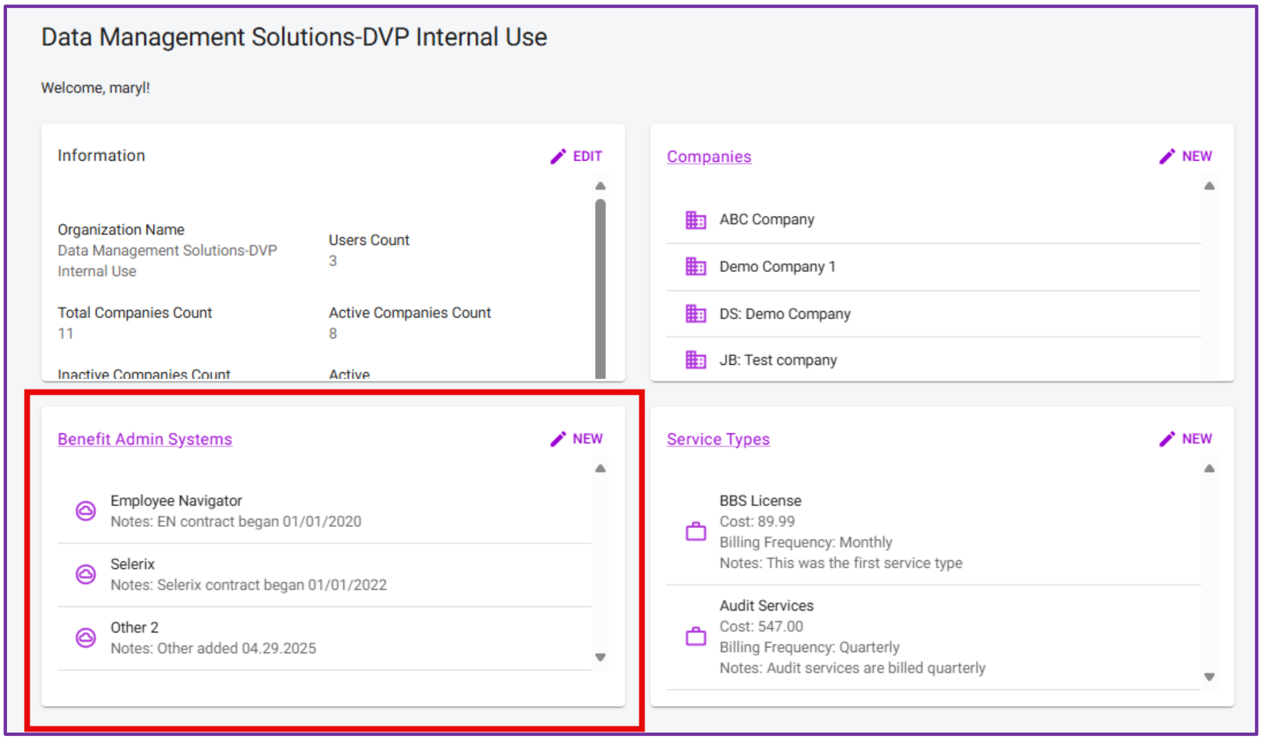


In the available screen, uncheck ACTIVE and enter a termination date and a termination reason for the deactivation. Click Save. Please note that the date has to be current or past. Future termination dates are not available.



Benefit Administration System Tracking

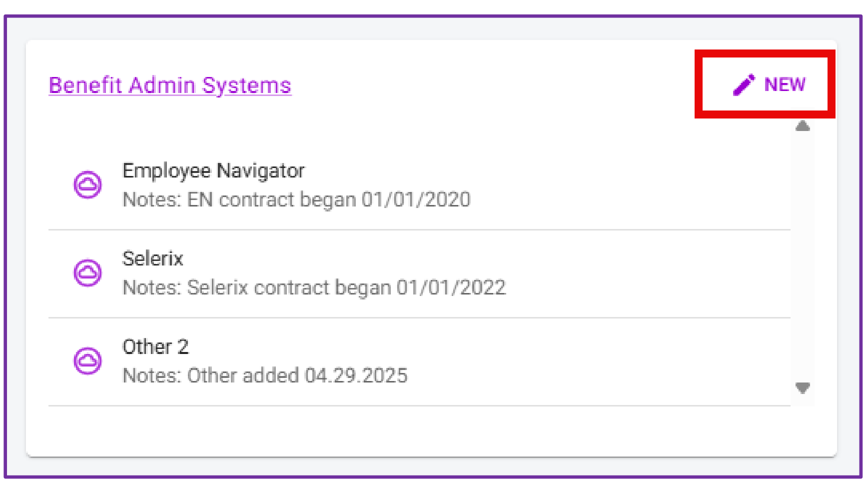
The Streamline application provides the option to track the benefit administration systems used for the organization which will then be available for selection at the Company Level. The tracking table is located on the Organization landing page.



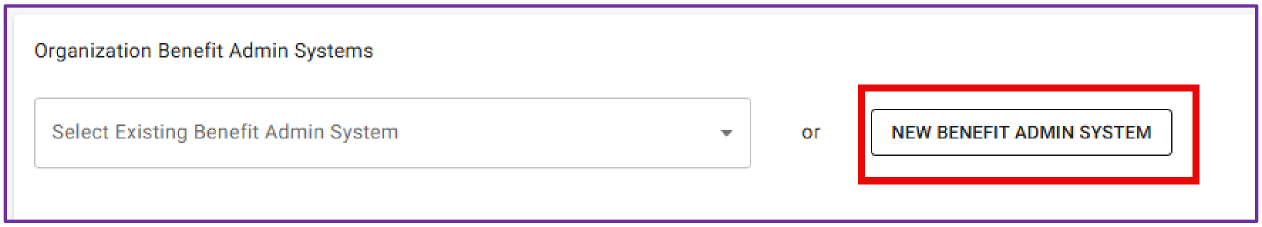
Add a Benefit Admin System

Navigate to the Organizations landing page as seen in the image above.

Click NEW

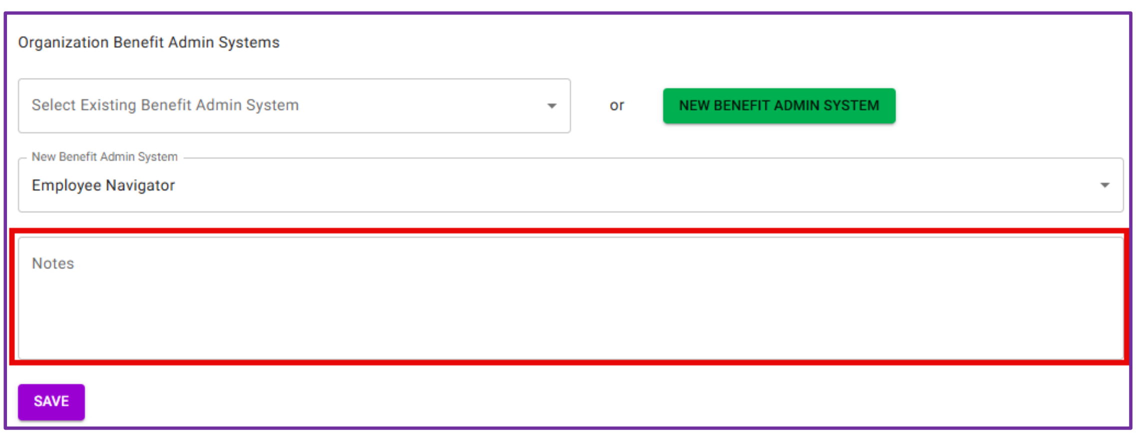


Click NEW BENEFIT ADMIN SYSTEM



Select the benefit admin system from the available dropdown.

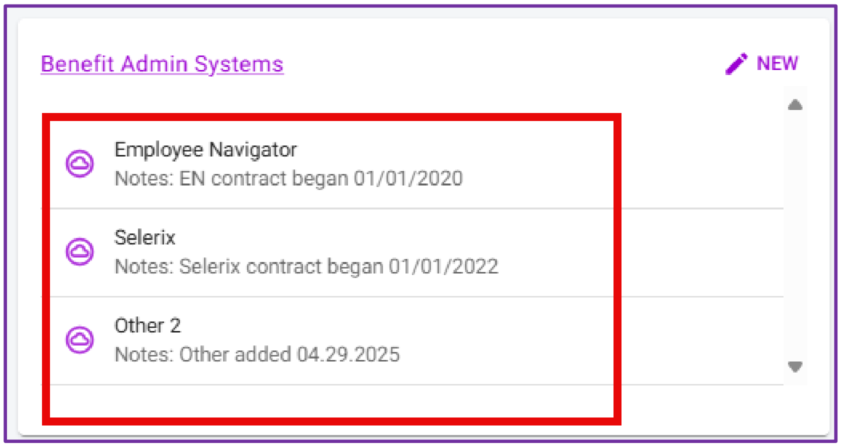
Add any notes pertaining to the system and click SAVE. This system is now available to be added to a Company.



Edit/Delete a Benefit Admin System

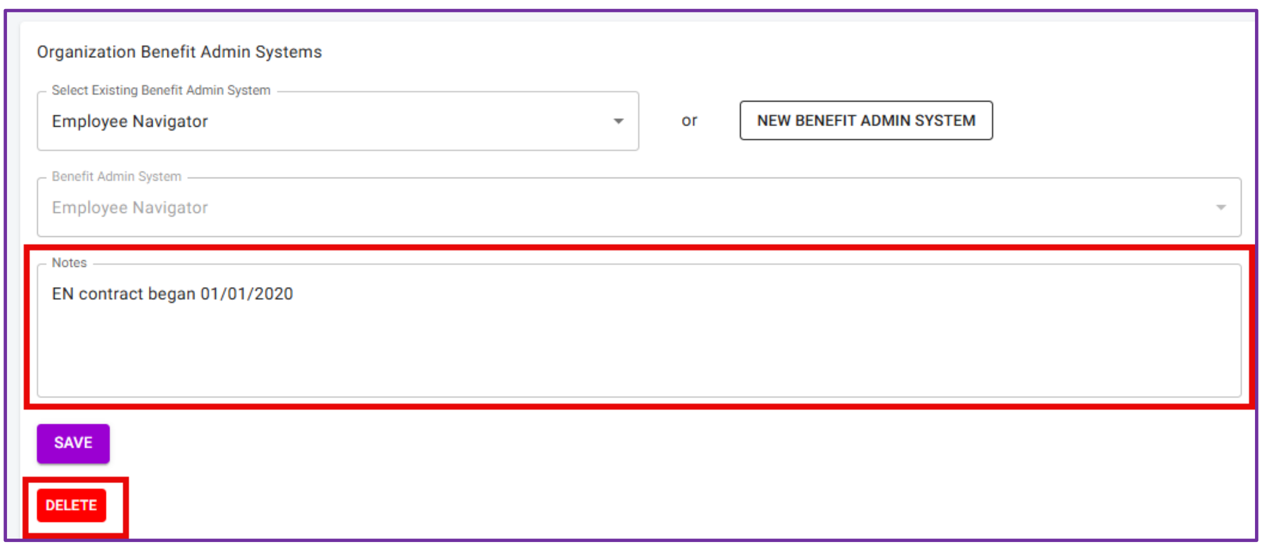
Navigate to the Organizations landing page

Click on the system that you want to edit or delete.



Currently the only field that can be edited is NOTES. Adjust as needed and click SAVE.

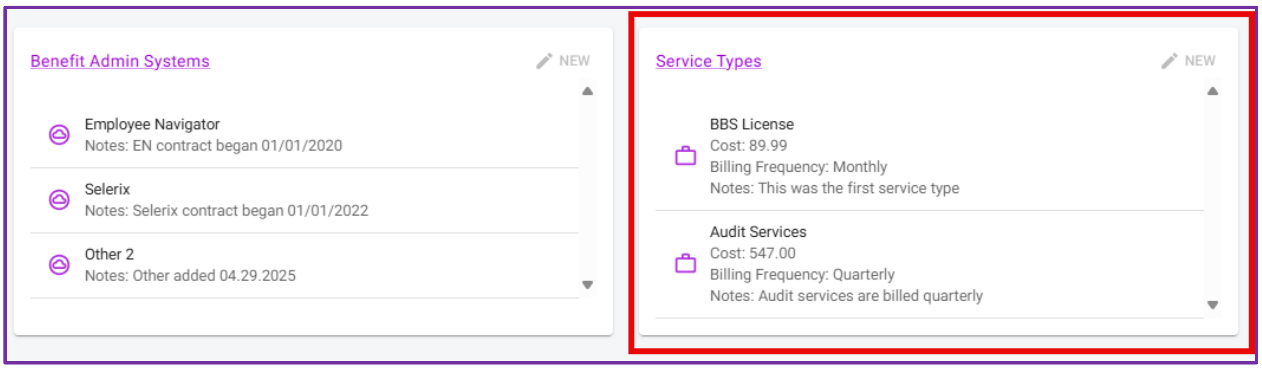
To delete the system from the Organization, simply click DELETE. However, please note that if the system is currently in use under a company, the system cannot be deleted. The system will need to be deleted from ALL companies in order to delete.



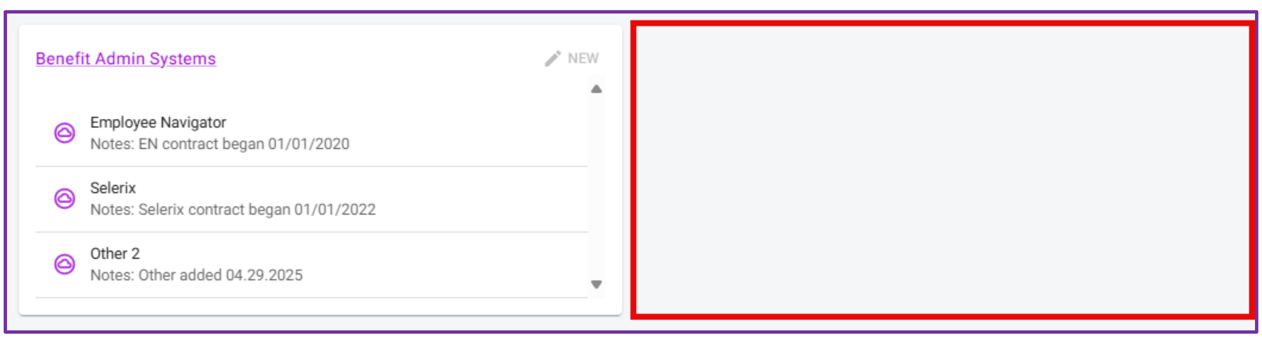
Service Type Tracking

The Streamline application allows tracking of service types used by the organization. **This information is view-only and accessible exclusively to the designated Billing Contact**. The service type table remains hidden from users who are not designated as the Billing Contact.

Billing Contact:



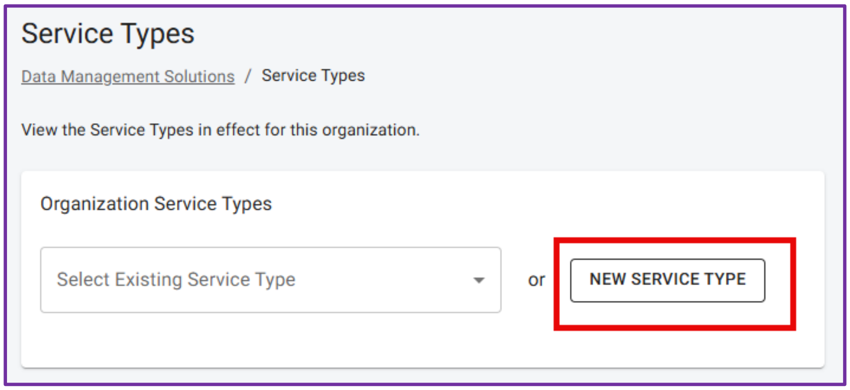
Non-Billing Contact:



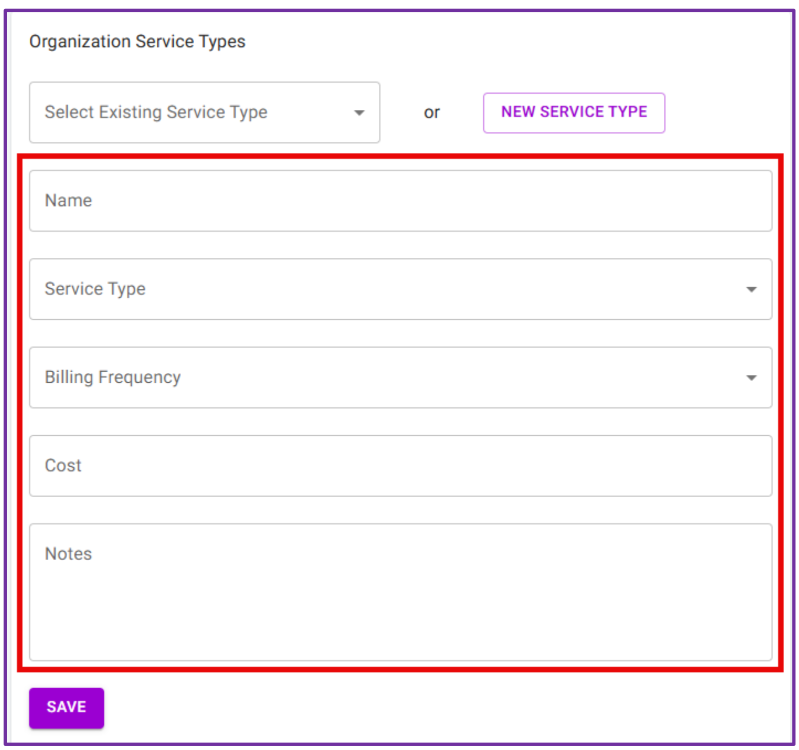
The Service Type Tracking and the designated Billing Contact is managed by the Agency and cannot be changed by an Organization user.

How to Add a Service Type

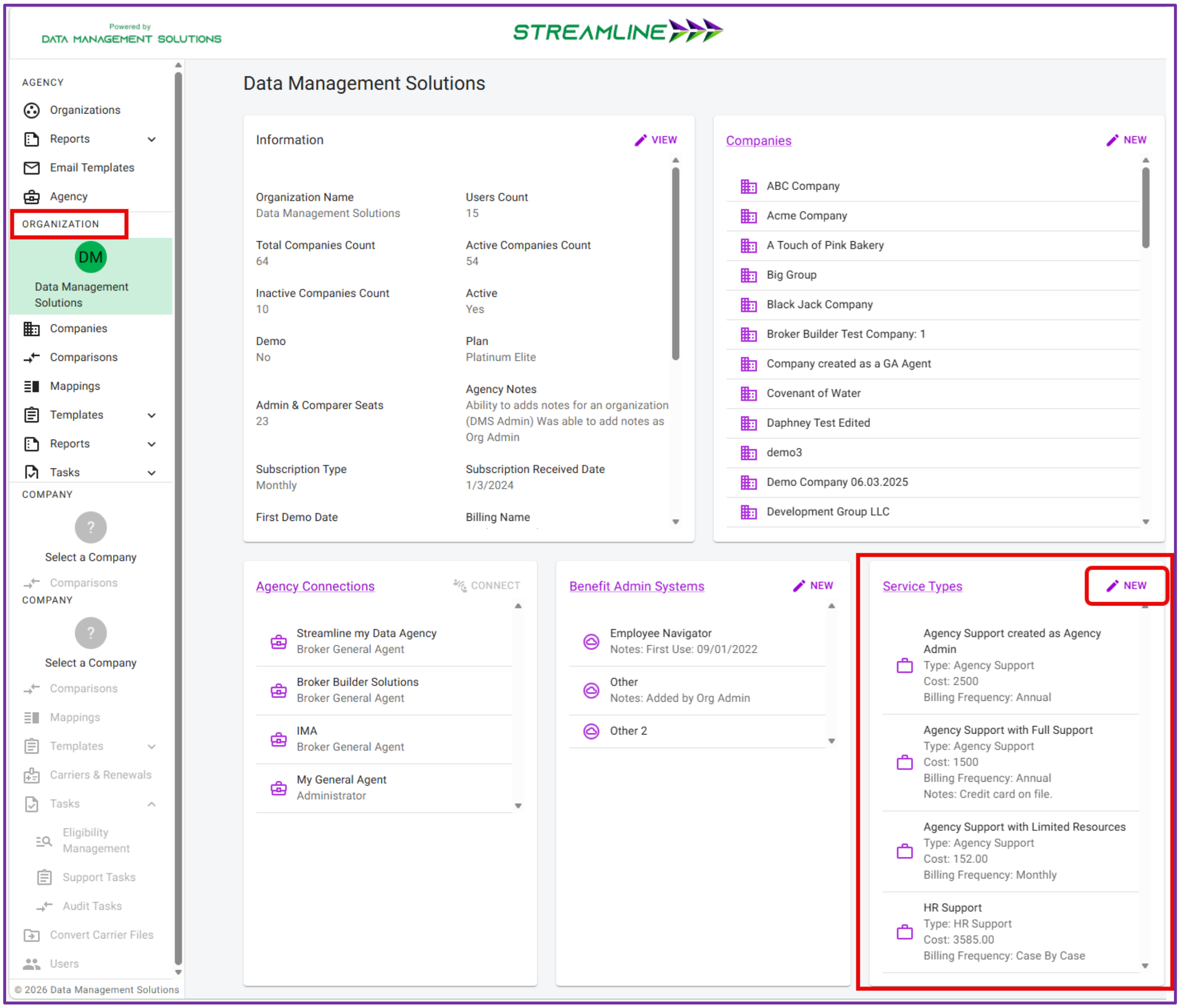
1. Navigate to the Organization to add a new service type to
2. Click NEW on the Service Type section
3. Click NEW SERVICE TYPE



4. Complete the following:
   a. **Name** – Enter the name of the Service Type. This field is **required** and must be **unique**.
   b. **Service Type** – Select one option from the dropdown.
   c. **Billing Frequency** – Select the appropriate billing frequency from the dropdown.
   d. **Cost** – Enter the associated cost for this service type for the organization.
   e. **Notes** – Enter any additional information related to this service type.

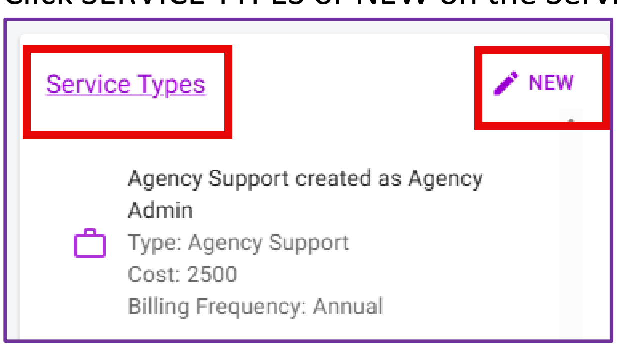


5. Click **SAVE** to create new service type.

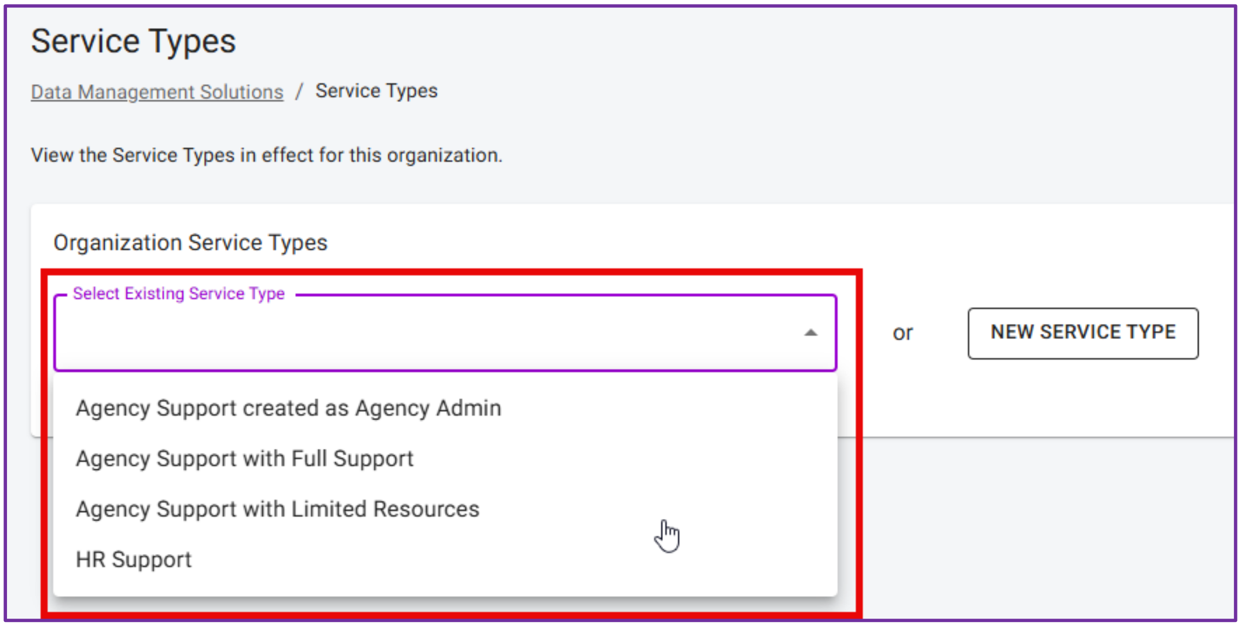


How to Edit/Delete a Service Type

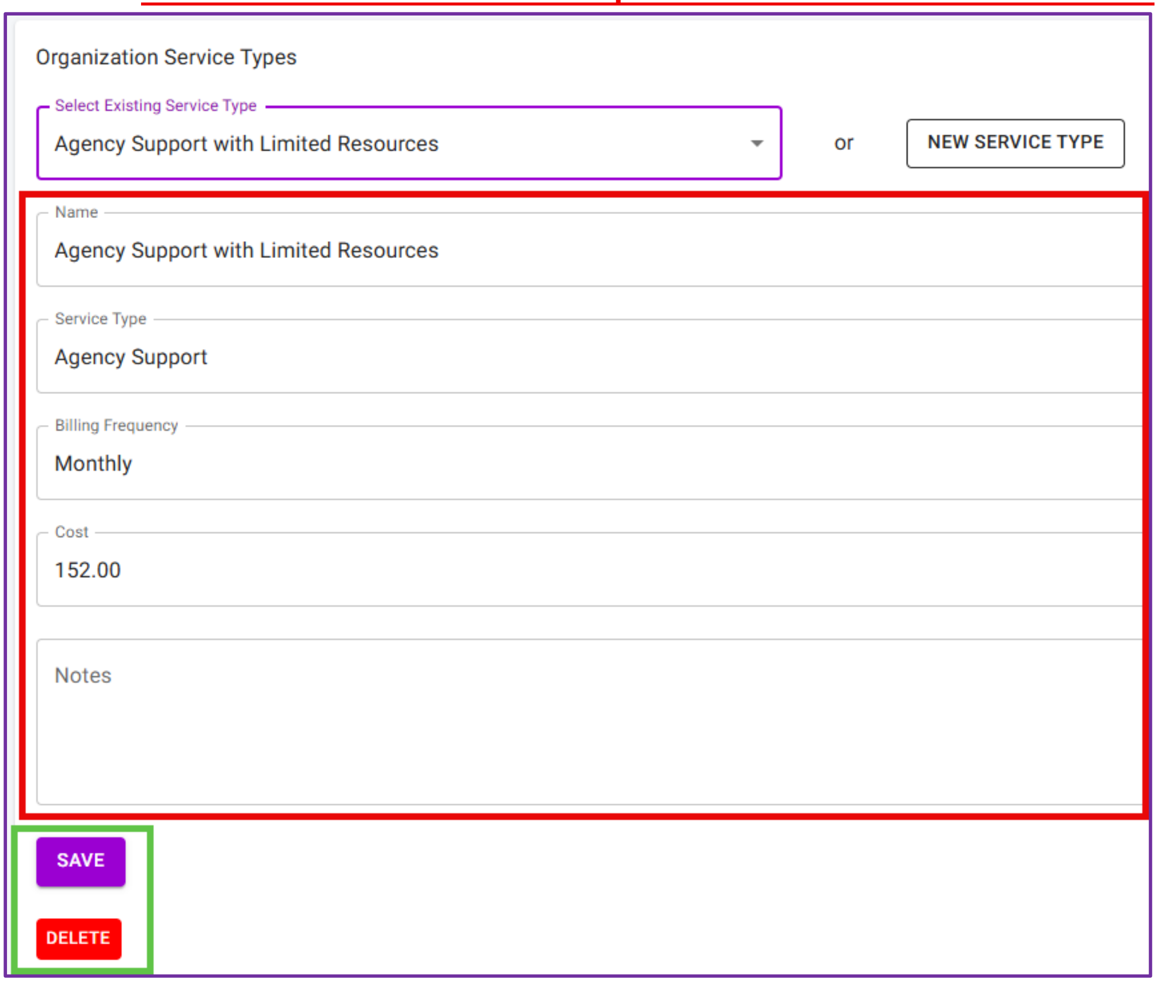
1. Navigate to the Organization to edit an existing service type.
2. Click SERVICE TYPES or NEW on the Service Type section



3. Click SELECT EXISTING SERVICE TYPE and select the service type to edit



4. Make changes and click SAVE
5. Alternatively, if the service type is being deleted, click DELETE and then CONFIRM DELETE. **Please note that deletions are permanent and cannot be undone.**



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:

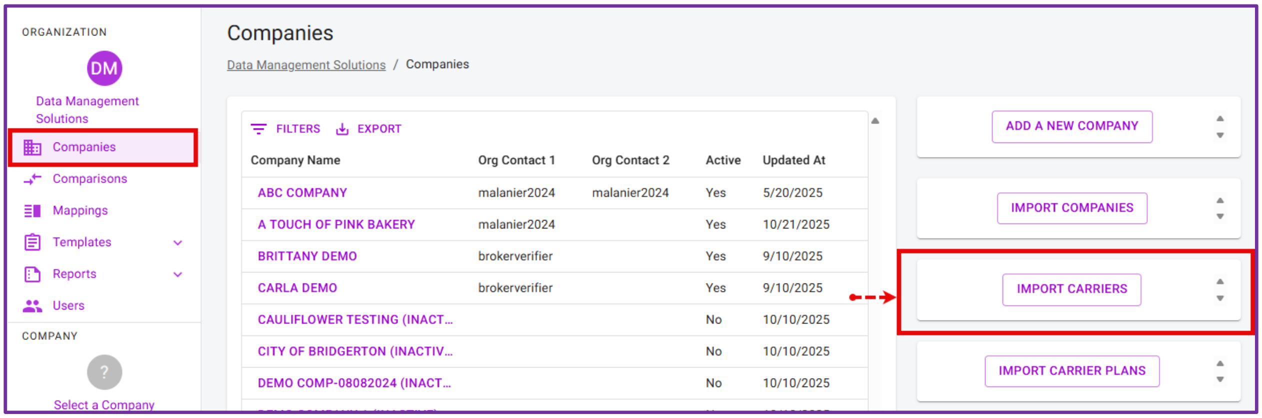
- Company Name (Required and must match company name in application)
- Carrier Name (Required and must match carrier name found in Import Template)
- Group Number (Required)
- Renewal Month (Required)
- Renewal Kickoff Days in Advance (Can choose between 30 to 90 days)
- Carrier Invoice Day of Month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

Import Carriers

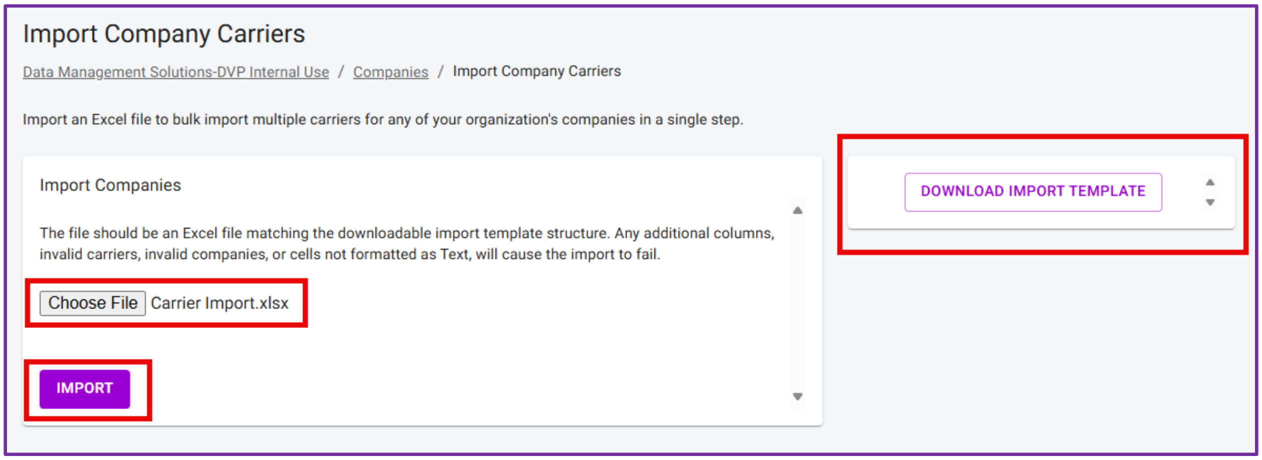
The Import Carriers button can be found on the Organization level under the Companies page.



Using the provided import template, complete all required fields:

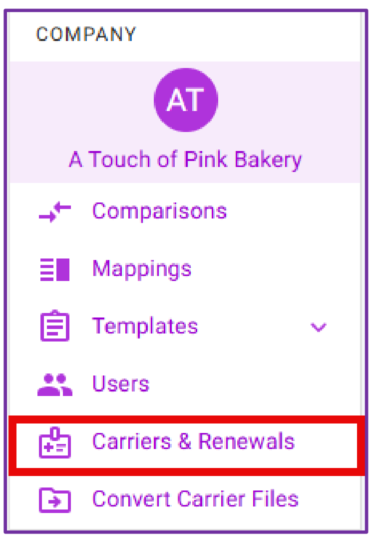
- Company Name: The company name must match the company name that is currently in the application. If the name does not match, the application will not be able to add the carrier information. (Required)
- Carrier Name: The available carriers are provided on a separate reference tab (Carriers(reference)) in the import template. 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)] (Required)
- Group Number: This is a free-from field for the Group Number assigned to the Company by the carrier. (Optional).
- Renewal Month (Required)
- Renewal Kickoff Days In Advance (Optional)
- Carrier Invoice Day Of Month (Optional)
- Eligibility Management Type (Optional- Eligibility Reference tab available in import template)
- Carrier Inception Date (Optional)
- Carrier End Date (Optional)
- Disable Renewals (Optional)
- 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)
- Organization Eligibility Contact Username (Optional)
- Organization Audit Contact Username (Optional)

The completed template can then be selected using the Choose File button and then IMPORT.

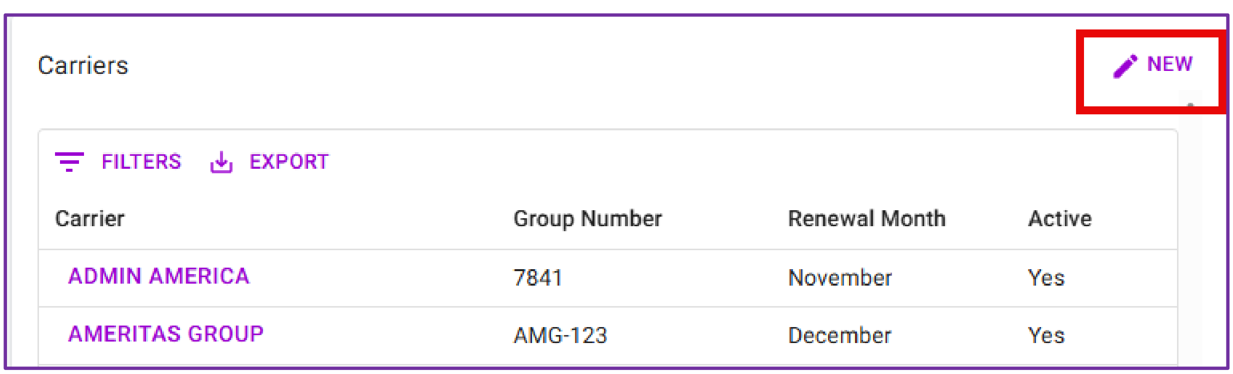


Manually add Carriers

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

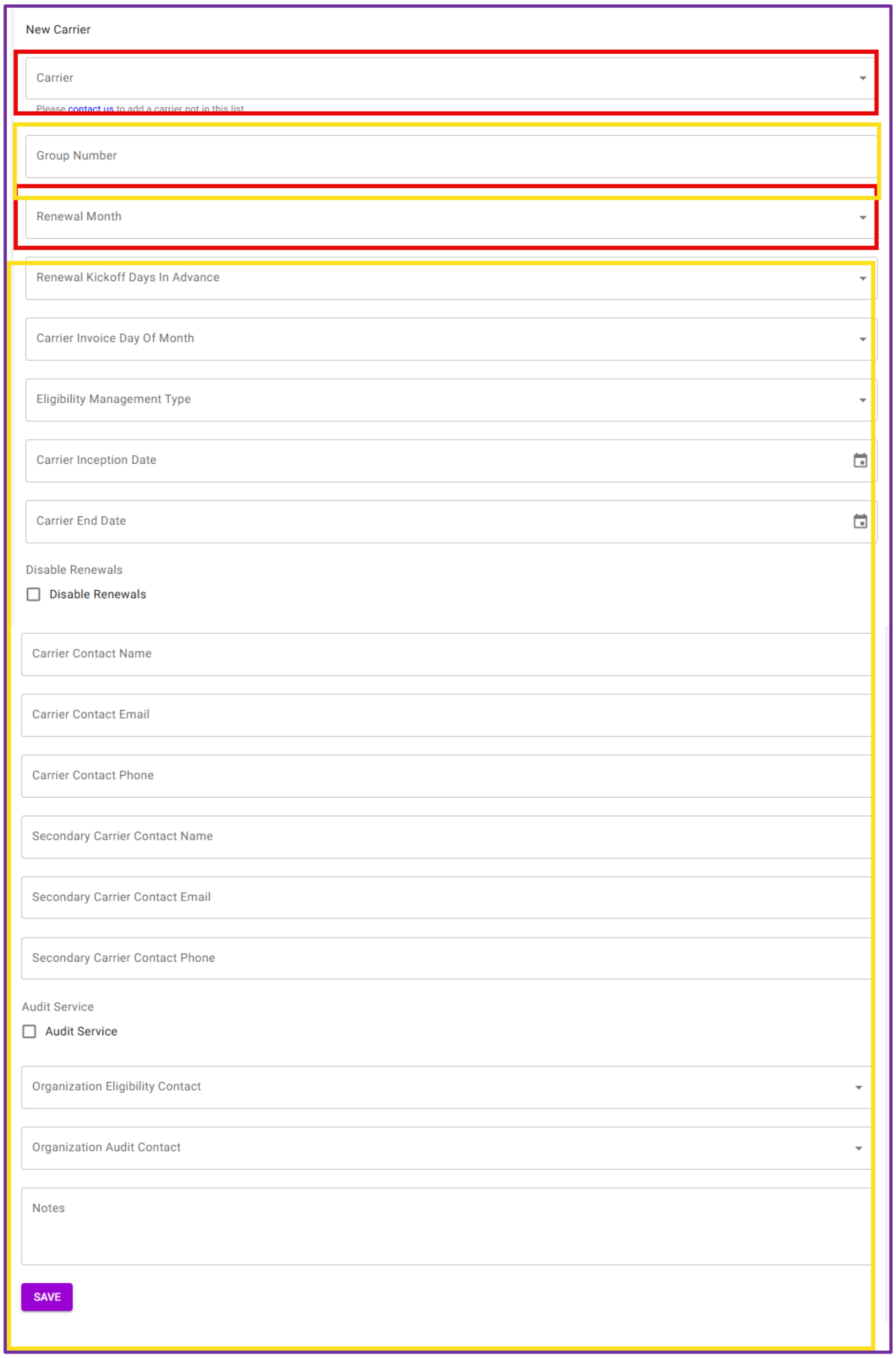


Click NEW



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

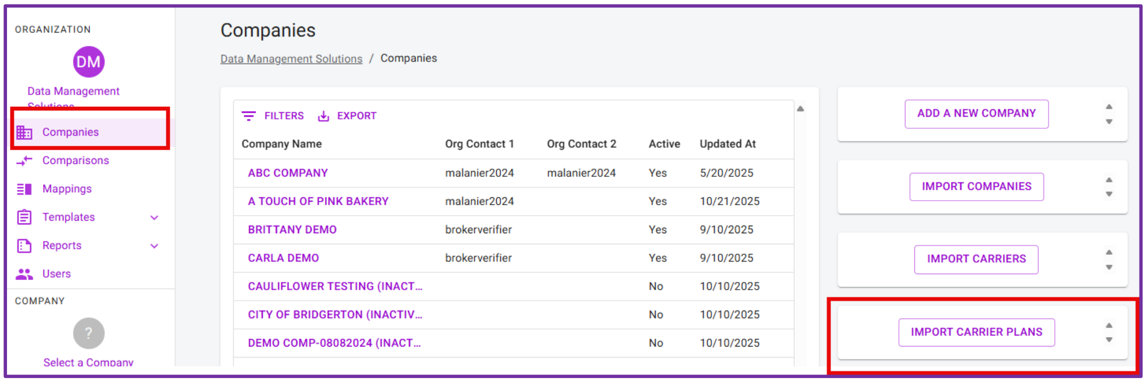
Carrier plan information tracking, however, is only available through the Platinum Elite or Subscription Based Audits subscription plans.

Import Plan

Carrier specific plans can be imported into the application. Using the provided carrier import template you can import the following fields:

- Company Name (Required)
- Carrier Name (Required – Carrier reference tab included in template)
- Plan Name (Required)
- Benefit Type (Required- Benefit Types reference tab included in template)
- Group Number (Optional)
- Eligibility Management Type (Optional)
- Disable Renewals (Optional)
- Notes (Optional)

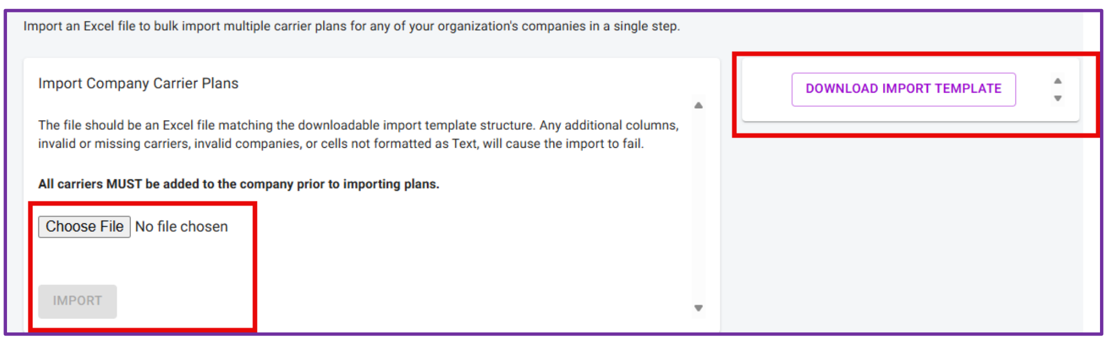
The Import Carriers button can be found on the Organization level under the Companies page.



Using the provided carrier import template, complete all required fields:

- Company Name (Required)
- Carrier Name (Required – Carrier reference tab included in template)
- Plan Name (Required)
- Benefit Type (Required- Benefit Types reference tab included in template)
- Group Number (Optional)
- Eligibility Management Type (Optional)
- Disable Renewals (Optional)
- Notes (Optional)

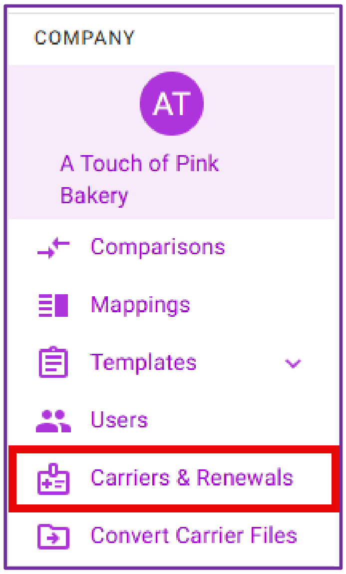
The completed template can then be selected using the Choose File button and then IMPORT.



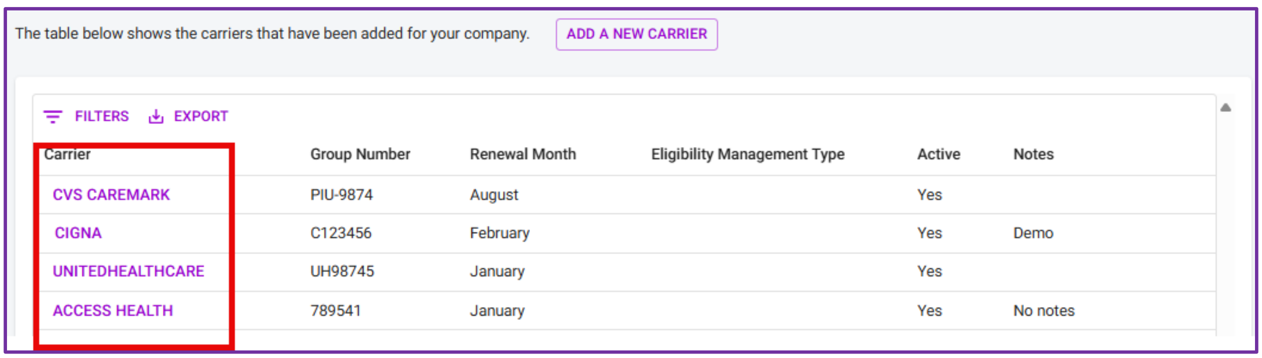
Carriers must be added to each company before importing plans. You may also import multiple plans across multiple carriers and companies in a single import

Manually Add Plan

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



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

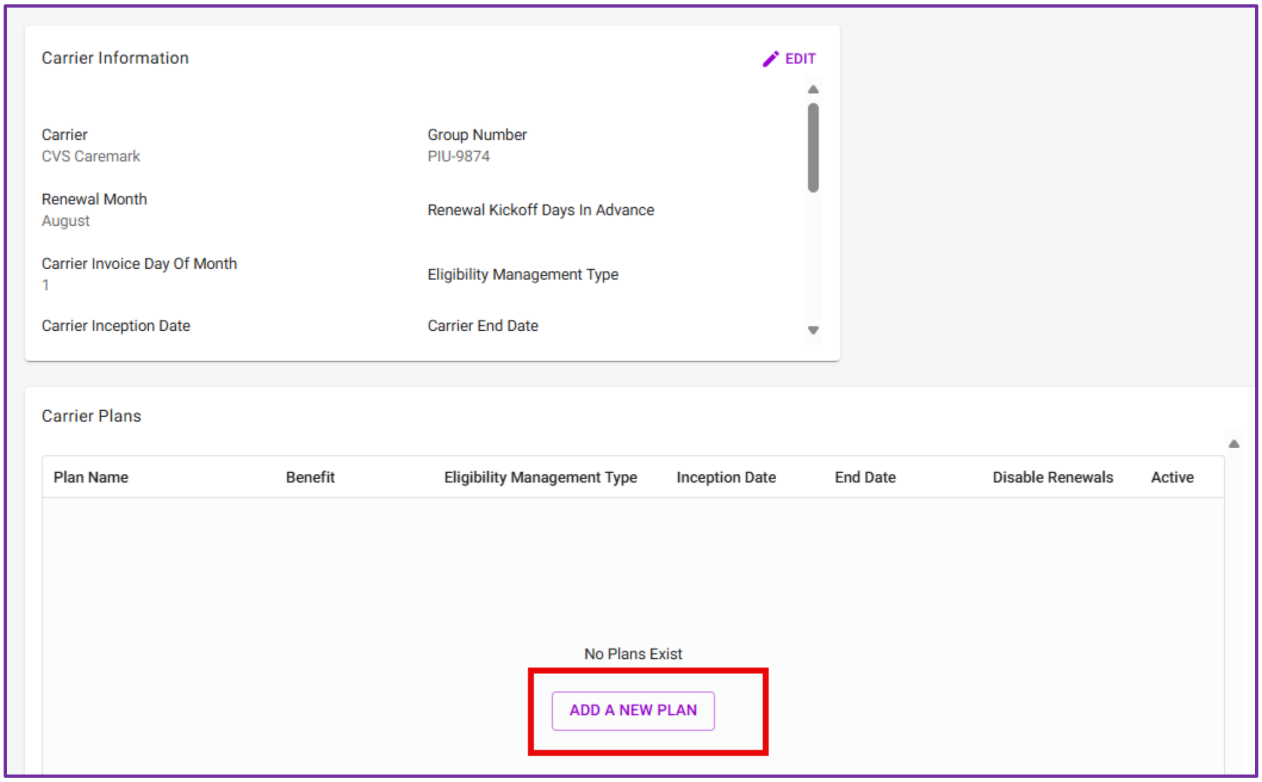


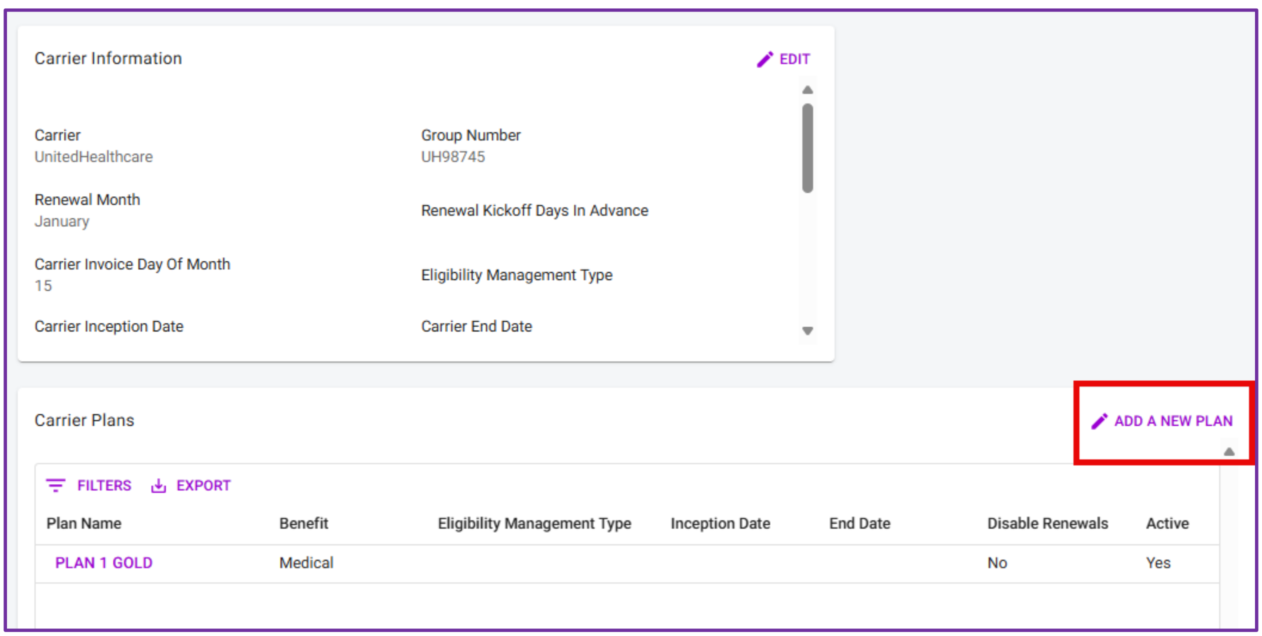
The table below shows the carriers that have been added for your company. ADD A NEW CARRIER

FILTERS EXPORT

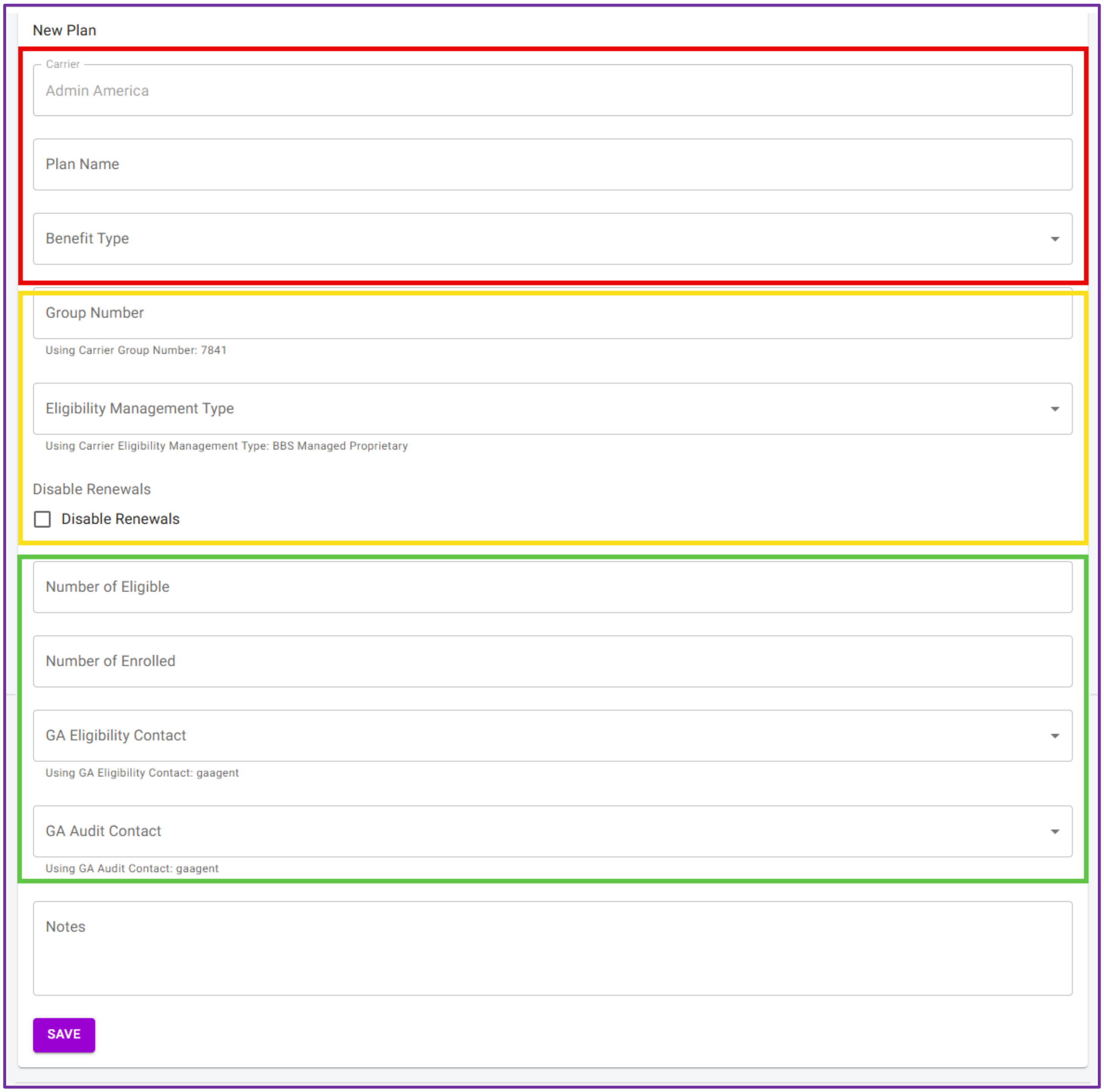
Carrier	Group Number	Renewal Month	Eligibility Management Type	Active	Notes
CVS CAREMARK	PIU-9874	August		Yes	
CIGNA	C123456	February		Yes	Demo
UNITEDHEALTHCARE	UH98745	January		Yes	
ACCESS HEALTH	789541	January		Yes	No notes

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





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 organization 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

Email Customization

The Streamline application has customized emails available at the agency, organization, and 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

Audit Task Complete

Comparison to Auditor

Comparison to Verifier

Eligibility Management Task Assignment

Eligibility Management Task Assignment - Error Report

Eligibility Management Task Complete

Renewal Task Assignment

Renewal Task Broker Managed

Renewal Task Complete

Renewal Task Kickoff

Renewal Task Kickoff Follow Up

Implementation Task Assignment

Implementation Task Complete

Implementation Task Kickoff

Implementation Task Kickoff Follow Up

Support Task Assignment

Support Task Complete

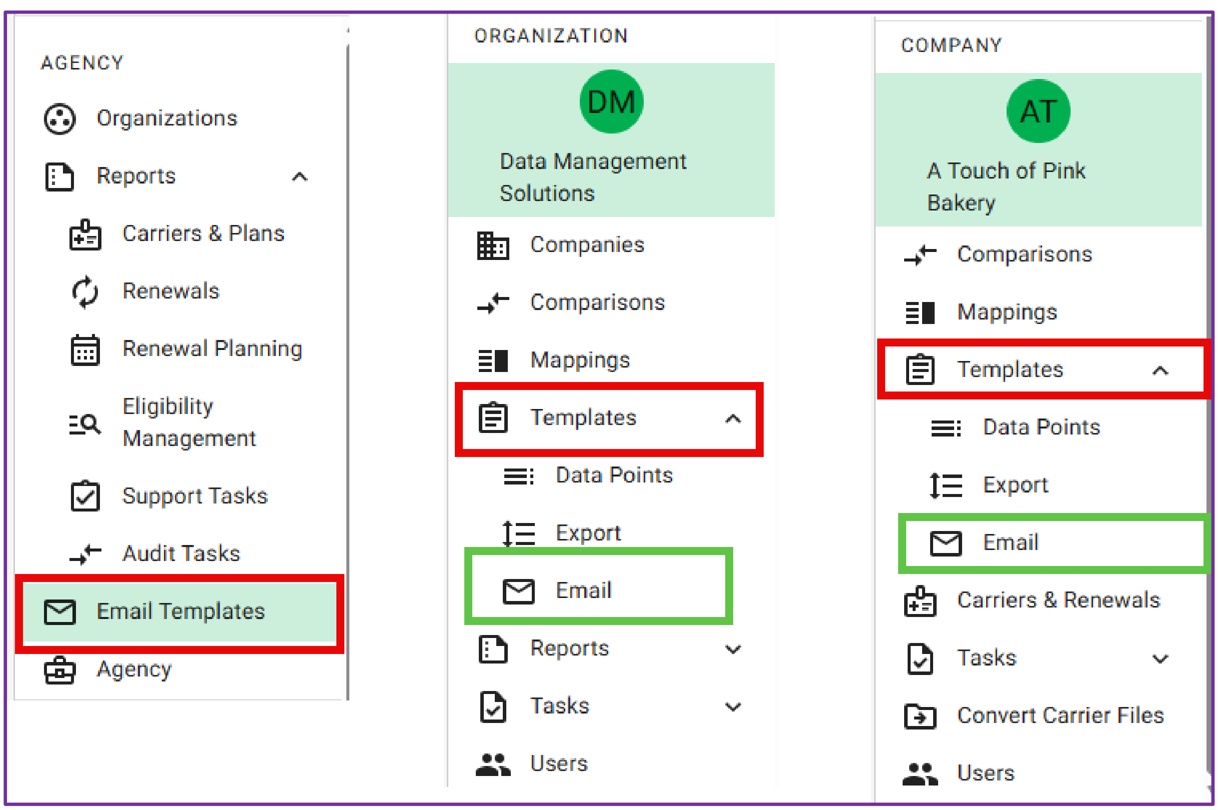
Key Features:

1. Customizable Templates:
   - Email templates can be found in the template library at the agency, organization, and company levels.
   - Default language can be fully customized to suit user preferences.

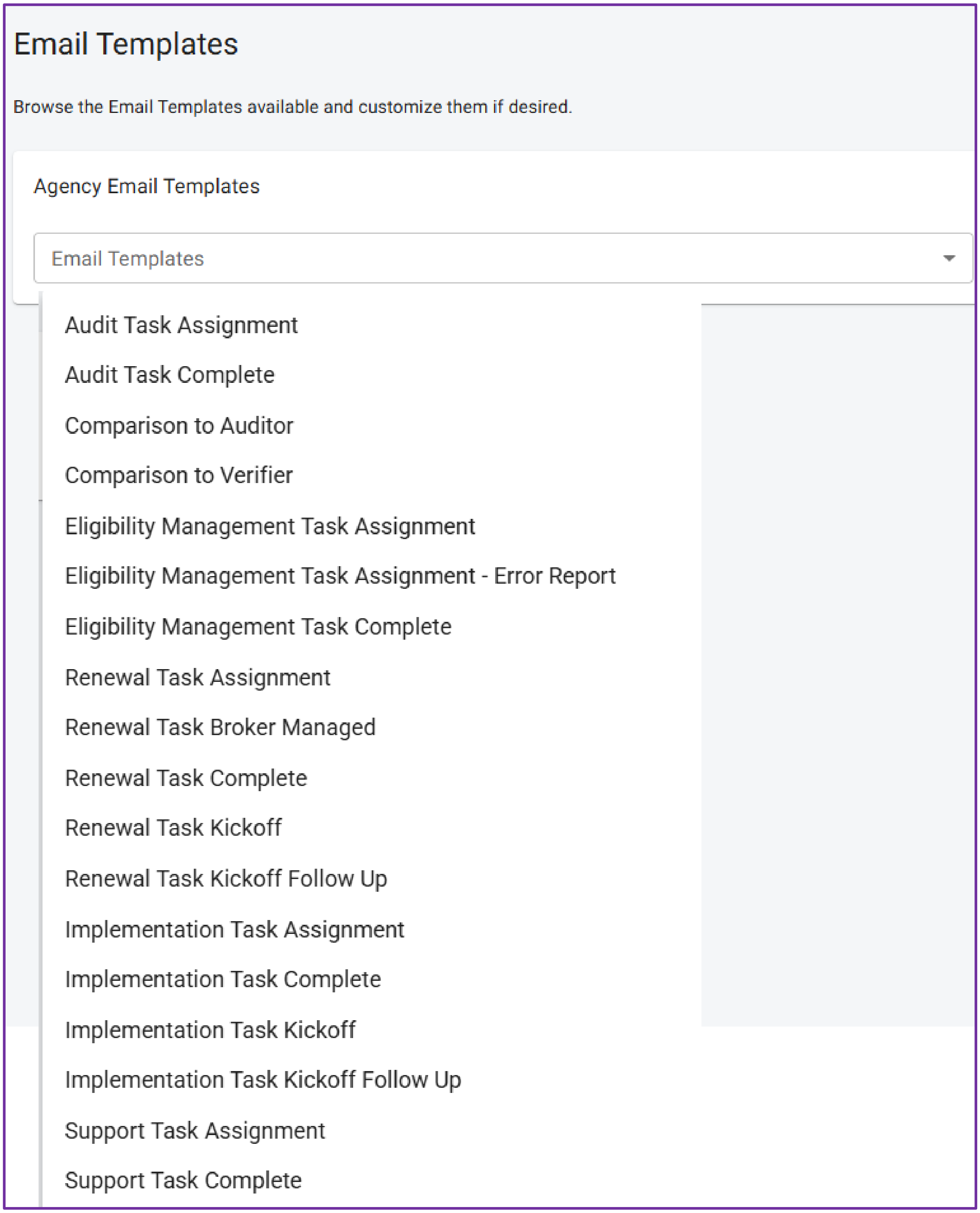
2. Additional Tokens:
    - Include dynamic data like carrier name, discrepancy counts, and renewal month in your emails for more personalized and informative communication.
3. Priority Rules:
    - Company-level templates take highest precedence
    - Organization-level templates are used if no Company 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

How to Customize an Email

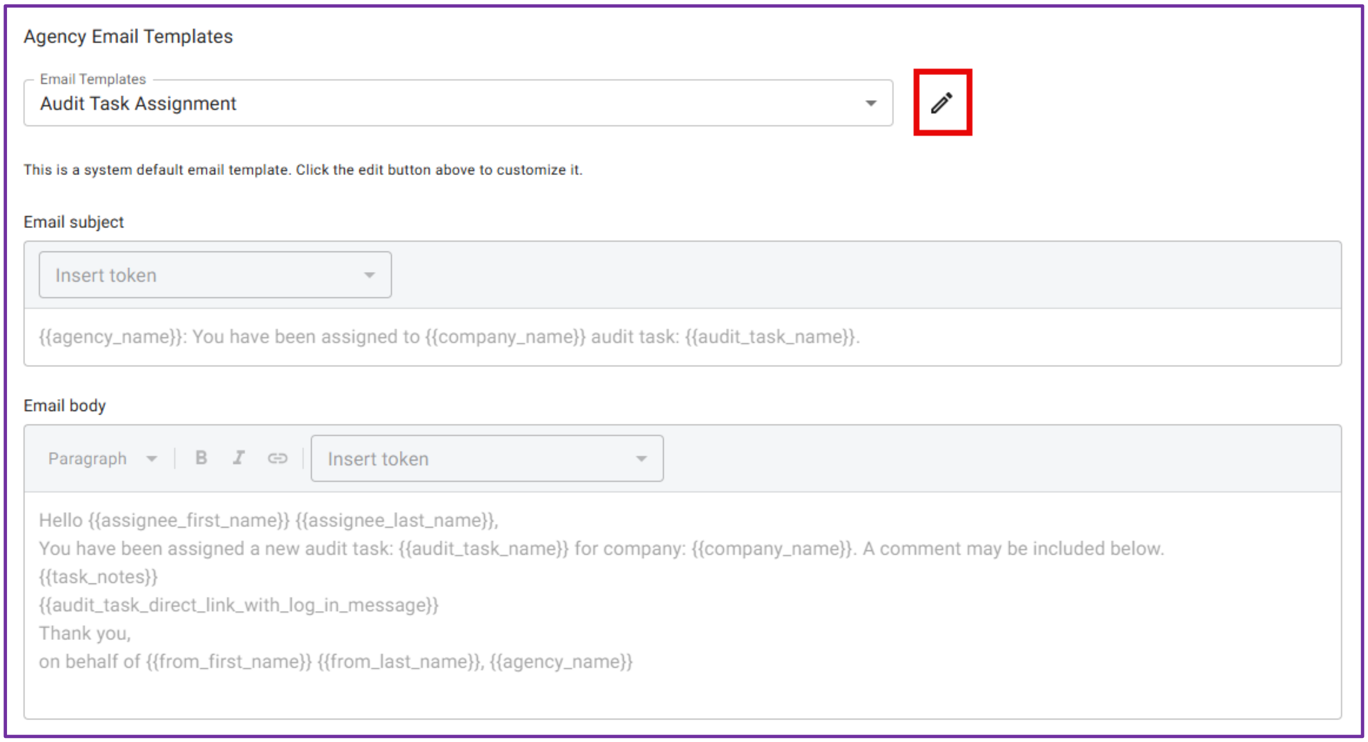
1. To customize an email, navigate to the **Template Library** at the **Agency**, **Organization**, or **Company** level, then select **EMAIL**.
    - At the **Agency level**, only the Email Template Library is available, so no dropdown will be displayed.
    - At the **Organization** and **Company** levels, a dropdown will be available for selection.

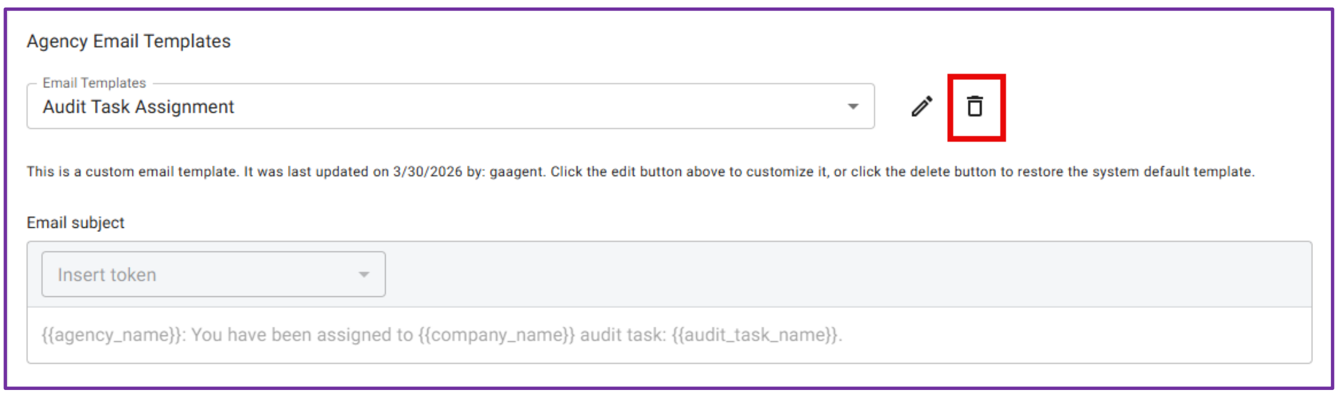


2. From the Email templates dropdown, select the desired template to customize.



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.

BenOps: Client Implementation Wizard

The Client Implementation Wizard is a collaborative workspace that helps clients collect, organize, and review the information needed to build a new group within a benefit administration system.

Using a structured workflow, the process captures key company details, organizational structure, eligibility rules, and plan information. This includes company contacts, payroll groups, classes, departments, locations, carrier and plan details, rates, contributions, eligibility requirements, and supporting documents, providing a centralized process for implementation setup and review.

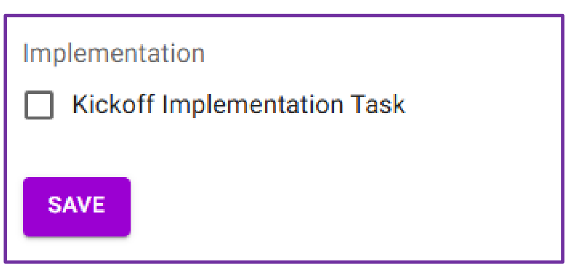
Who Does What?

GA (General Agent) **/ Organization Admin** → Starts the implementation, reviews/approves, enters testing details, closes task.
Organization Contacts → Provides client information, completes plans checklist, tests, and approves the implementation to Go Live.

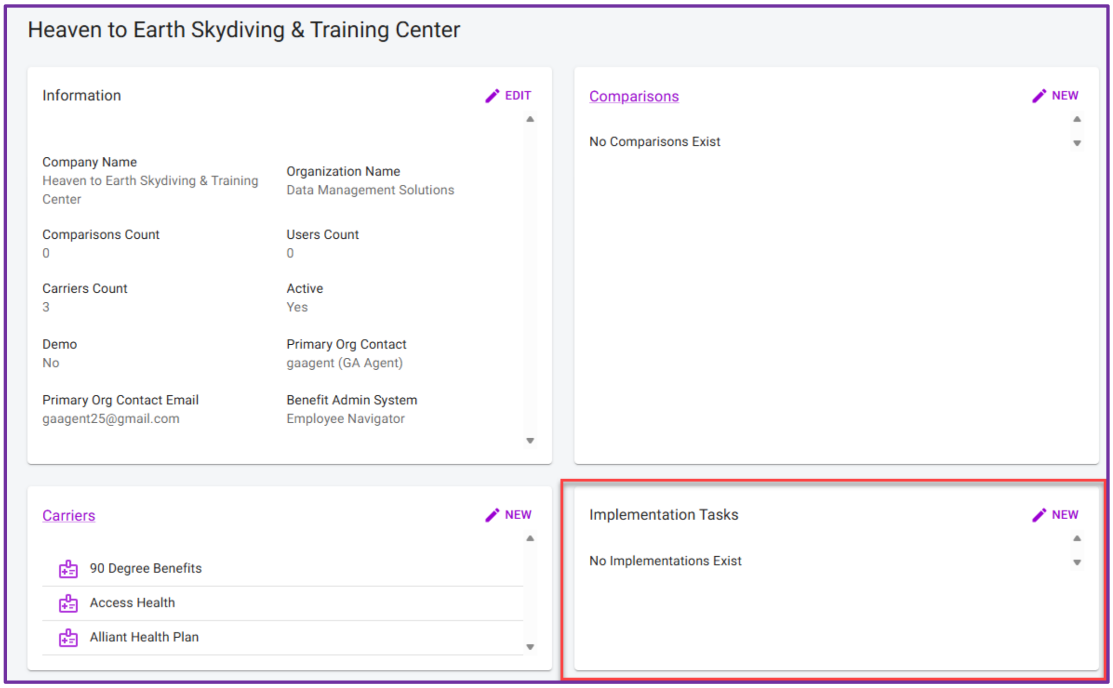
How It Works

Step 1: GA/Org Admin Initiates a Client Implementation

- User logs into the **Streamline application**.
- Navigate to the Organization/Company section depending on next steps.
    - If creating a new company,
        - Navigate to the Organization and then Companies
        - Click Add a New Company and add all applicable information.
        - Check the Kickoff Implementation Task option

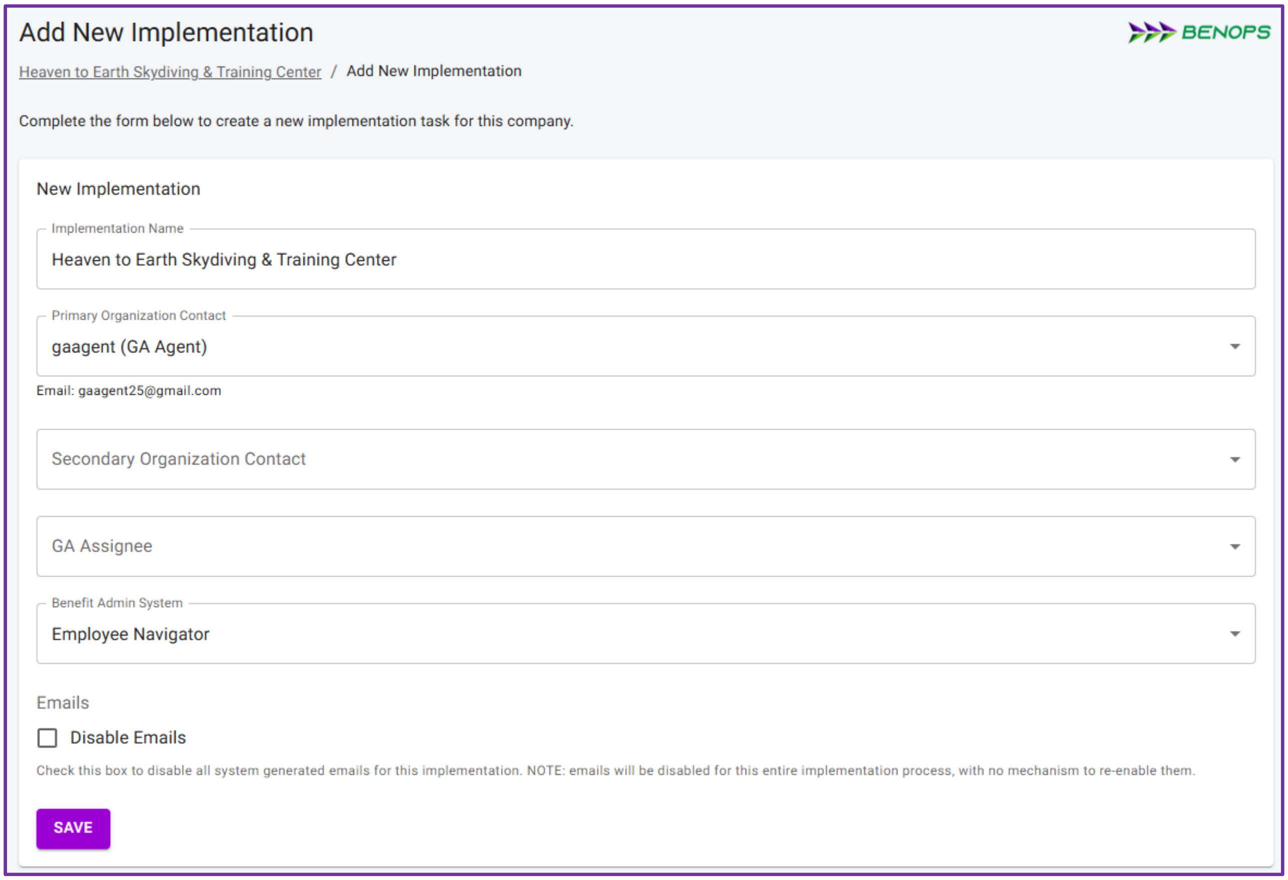


- If existing company,
  - Navigate to the specific company detail page.
  - Click New in the Implementation Task section



- Complete the following fields:
  - Implementation Task Name: This typically defaults to the Company Name but can be changed. The company name is not impacted by the task name change.
  - Primary Organization Contact (Required)
  - Secondary Organization Contact (Optional)
  - GA Assignee (Optional but recommended for best practice. If left blank, will default to Agency Support email if available in Streamline). Org Admins do not have the ability to select this field.
  - Benefit Admin System (Required)
  - Disable Emails (Optional) - if the user does not want any system-generated emails sent for a specific renewal.

Please note: Once this option is selected, it cannot be changed. Emails will remain disabled for the duration of the renewal, and there is no option to re-enable them.



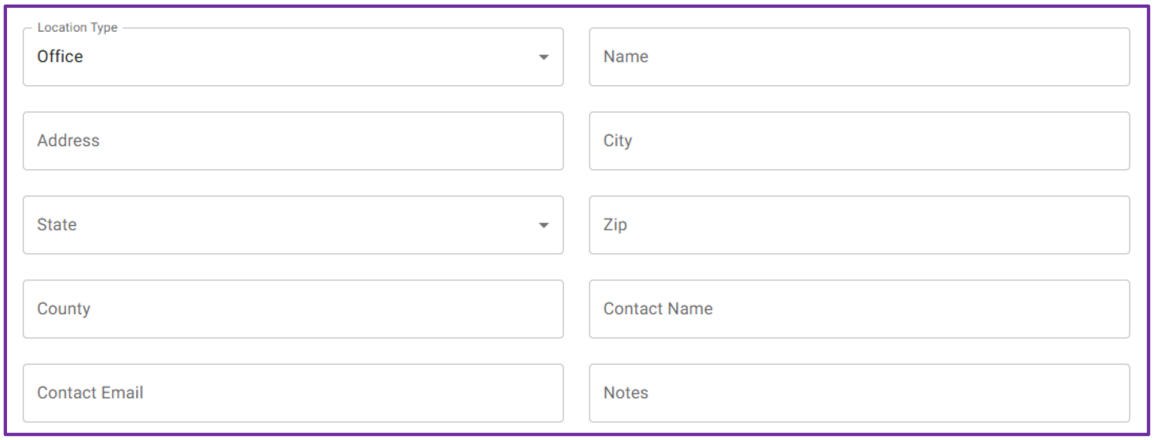
- <u>**IF DISABLE EMAILS IS NOT CHECKED**</u>, an **automated email** notifies the designated Primary, Secondary, and GA Assignee contact that an implementation has been created.

Step 2: Organization Completes Client Information

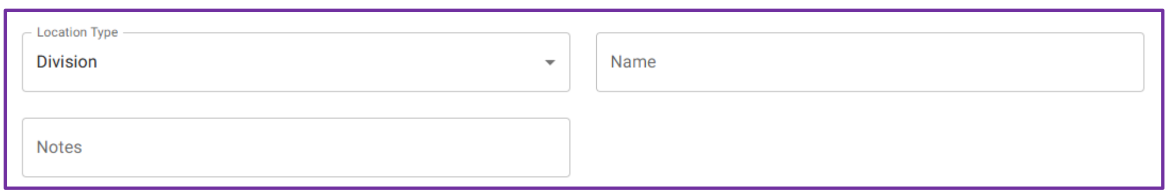
- The Organization will receive an Implementation Kickoff email outlining the next required actions. This email includes a link that, once logged into the application, allows the Organization user to easily access the implementation and begin **Step 1: Client Information**.
- The user will then complete the Required fields:
  - **Company Information**

    - **Company Address**
    - **Company Tax ID**
    - **Benefit Eligible Lives**
  - **Company Contacts – Can add multiple contacts**
    - Name
    - Email
    - Job Title
    - Phone
  - **Payroll Groups, Classes and Entry/Eligibility Rules** – Can add multiple payroll groups and multiple classes per payroll group
    - Payroll Group
      - Pay Frequency
      - First Pay Date
      - Classes – can add multiple classes per payroll group
        - Class Name
        - Benefits Eligible Monthly Hour Minimum
        - Notes
        - Benefit Entry Rule
        - Benefit Waiting Period
        - Benefit Termination Rule
        - Rehire Entry Rule
        - Rehire Waiting Period
        - Rehire Coverage Grace Period
        - Demographic Entry Rule
        - Demographic Waiting Period

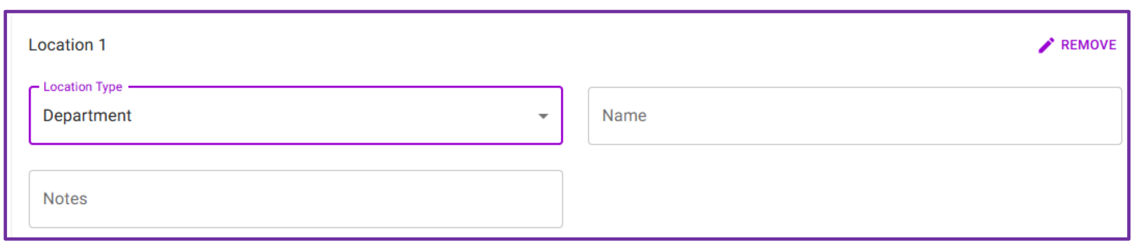
- **Locations (Office, Divisions, Departments, Business Units)** – Different information is required based on location type.
  - Office



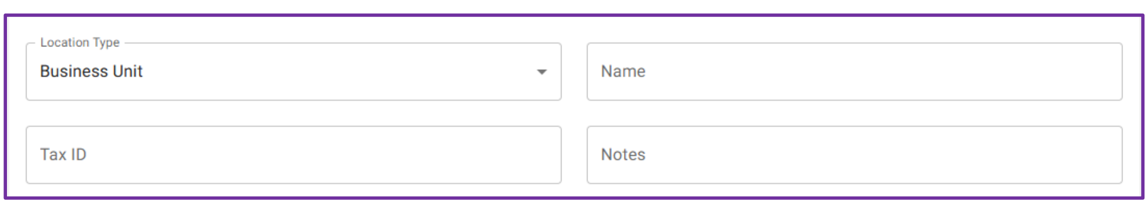
  - Division



  - Department



  - Business Unit

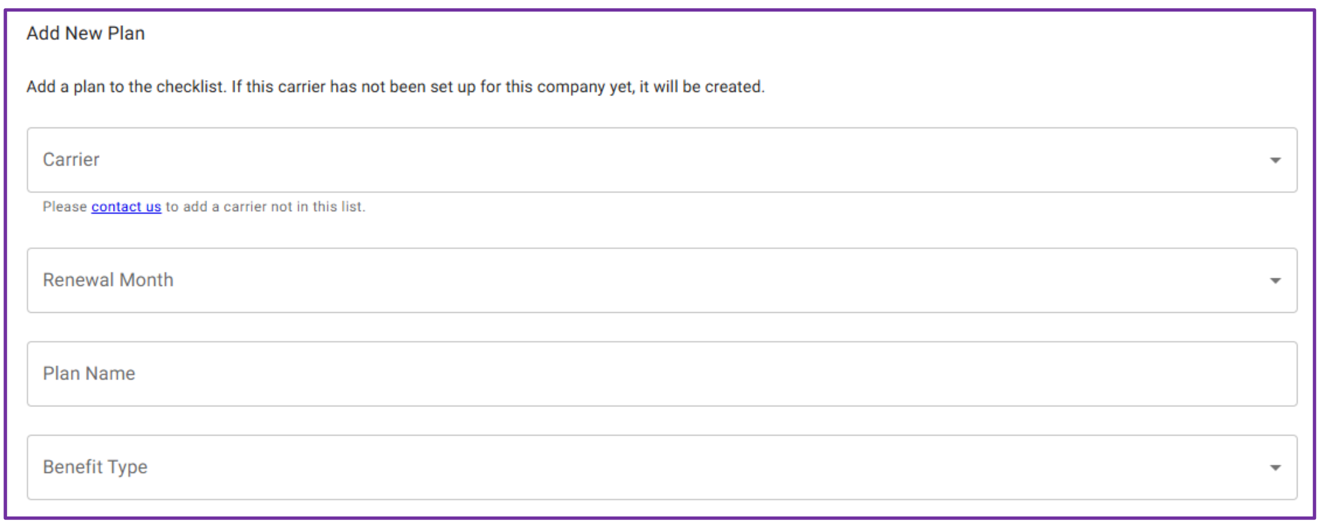


- Comments

- Click **Submit Client Information** → GA is notified for review. Alternatively, **Save Draft** can be selected if not ready to submit for review and need to come back to at a later date.

Step 3: Organization Completes Plans Checklist

- Click **ADD NEW PLAN**
    - **Select the carrier**
    - **Select the Renewal Month**
    - **Add a Plan Name**
    - **Select the Benefit Type**


Add New Plan

Add a plan to the checklist. If this carrier has not been set up for this company yet, it will be created.

Carrier

Please contact us to add a carrier not in this list.

Renewal Month

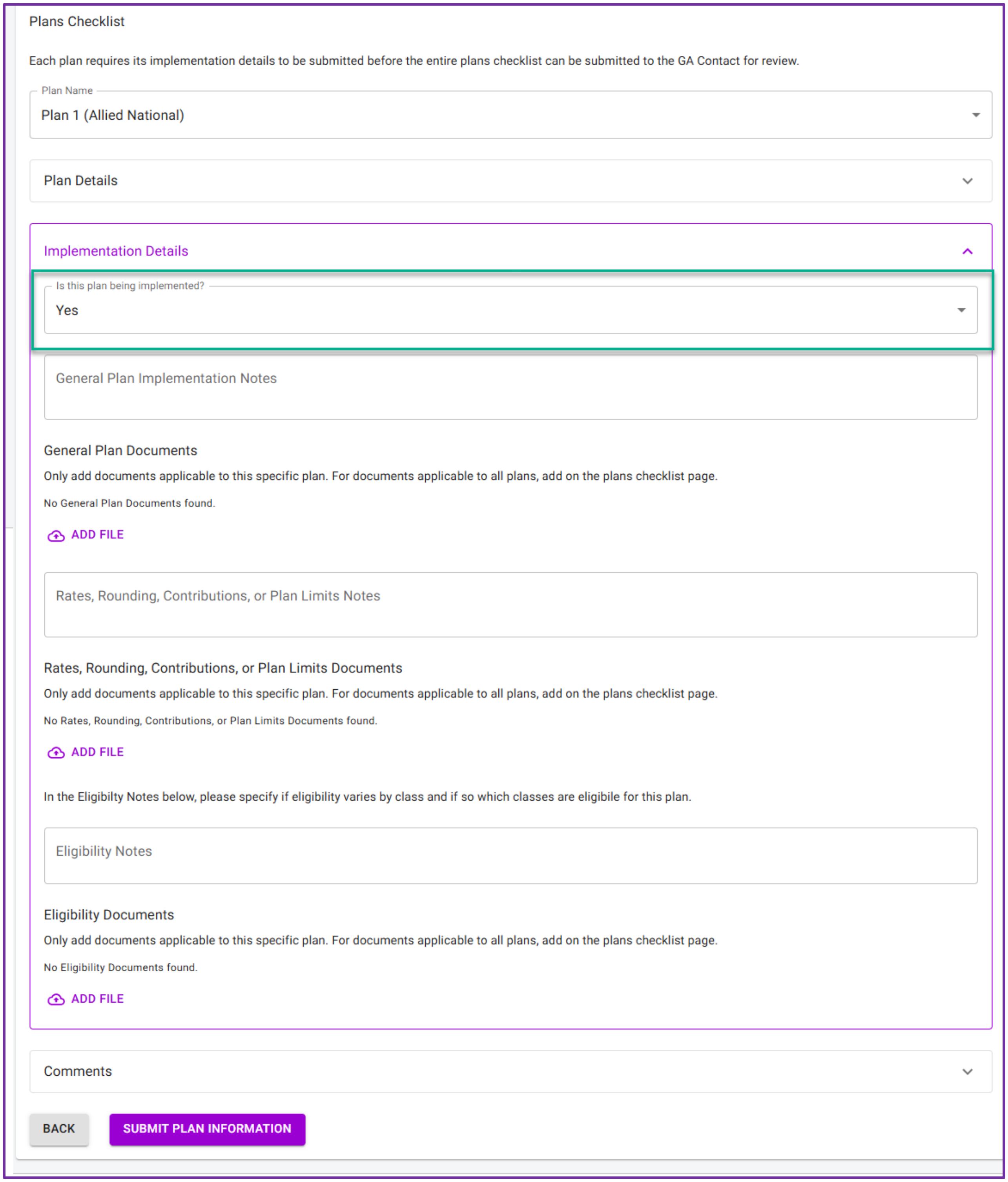
Plan Name

Benefit Type

    - Implementation Details
        - Complete the fields per Plan
            - Is this plan being implemented? —Defaults to YES
            - General Plan Implementation Notes and File Upload
            - Rates, Rounding, Contributions, or Plan Limits Notes and File Upload
            - Eligibility Notes and File Upload
            - Comments

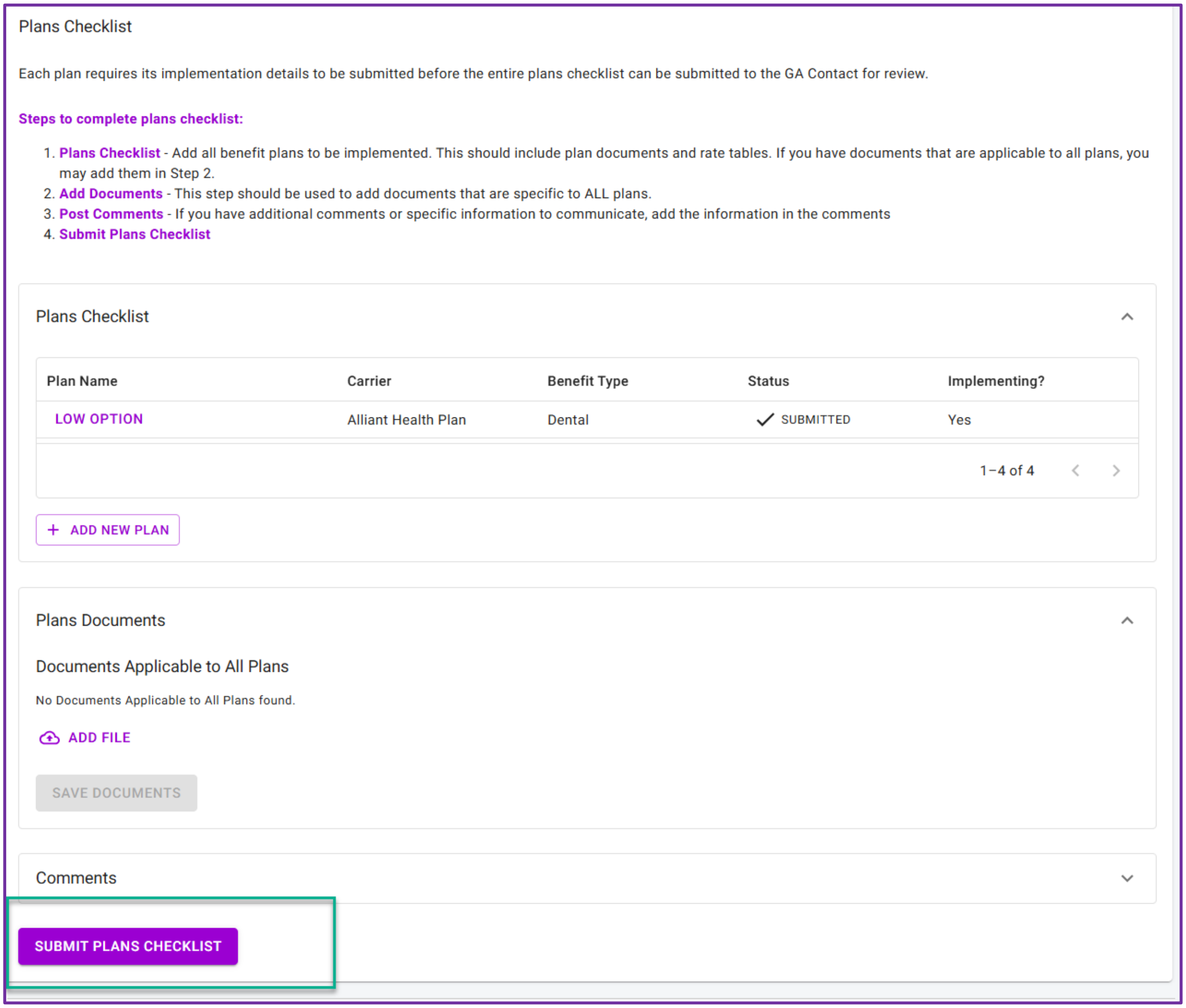
   - Submit Plan Information

- Plans Documents Upload – This is an area that you can upload a document(s) that is applicable to ALL plans.
- Comments



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

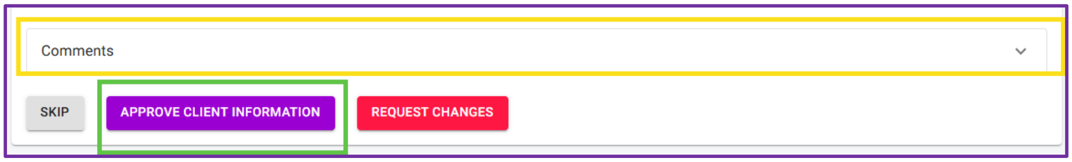
- Once all plans are submitted, click **Submit Plans Checklist** → GA is notified by an email.



Step 4: GA Reviews & Collaborates

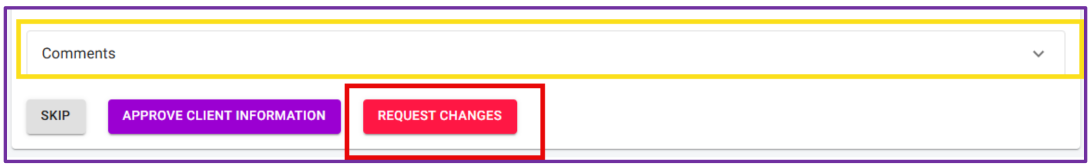
- GA will receive an email when the Organization contact completes the Client Information and/or Plans Checklist.
    - **GA Review Client Information – Approval**

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**.



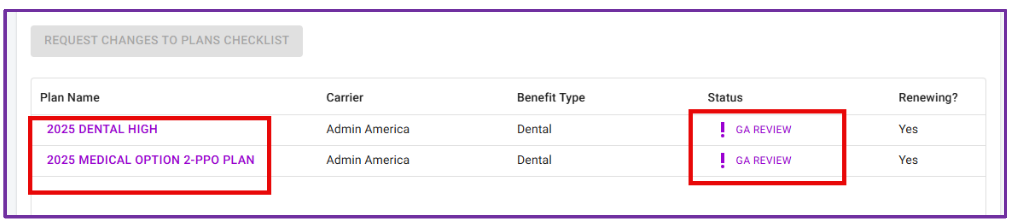
- **GA Review Client Information – Request Changes**

  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

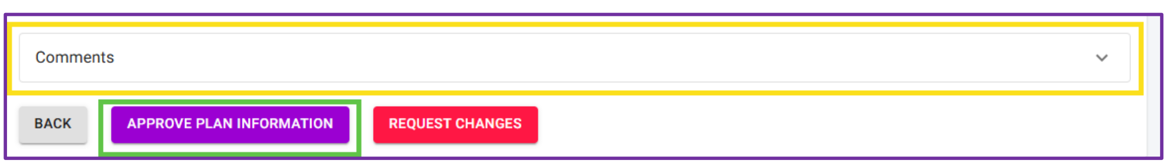


- **GA Review Plans Checklist – Approval**

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

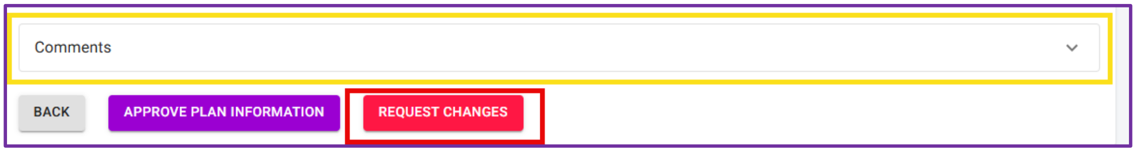


If all required information and documents have been provided by the organization contacts and no further details are needed, the GA should add any desired comments and then click **APPROVE PLAN INFORMATION.**



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

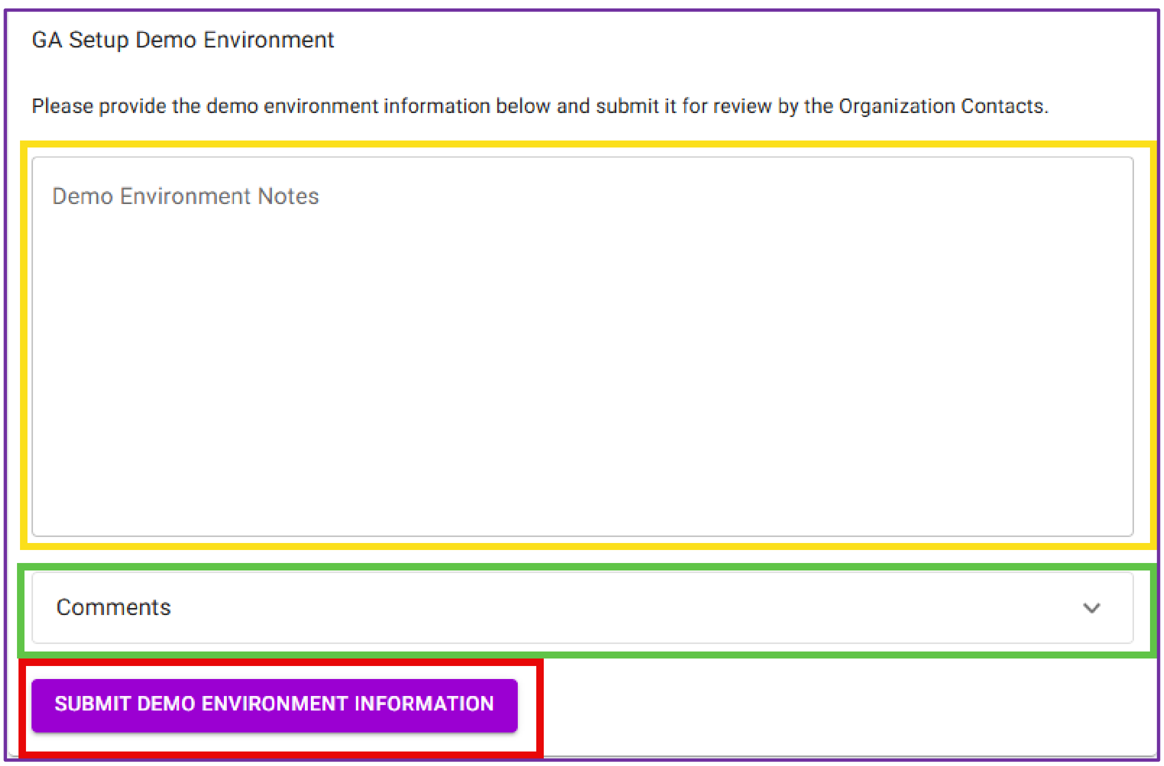
  If additional information or clarification is needed, the GA should add a comment and then click **REQUEST CHANGES**. This will send an email with the comment to the organization contacts



- When all plans have been approved, click **APPROVE PLANS CHECKLIST**.
- Collaboration continues until both steps are approved.

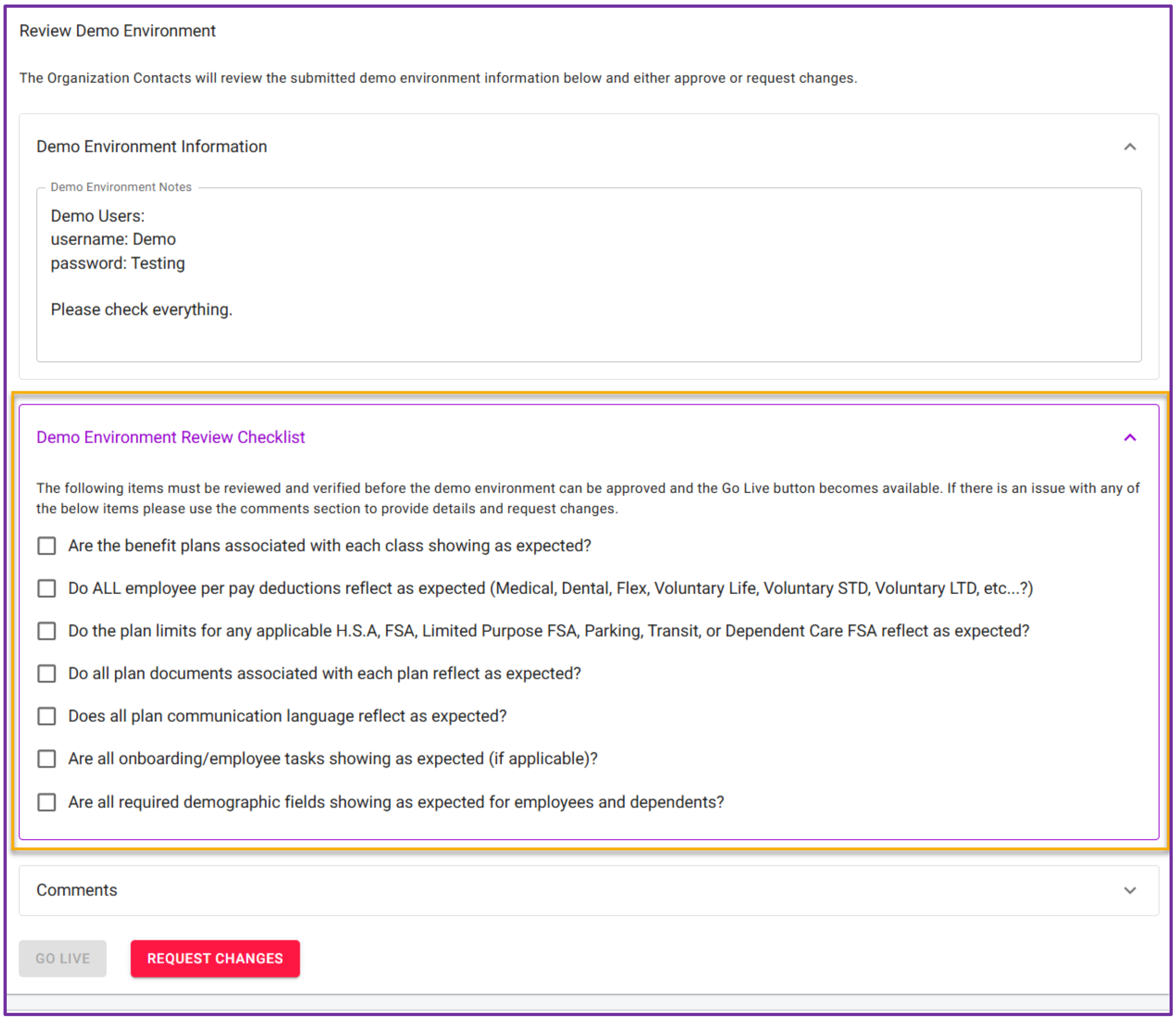
Steps 5 & 6: Testing & Go Live

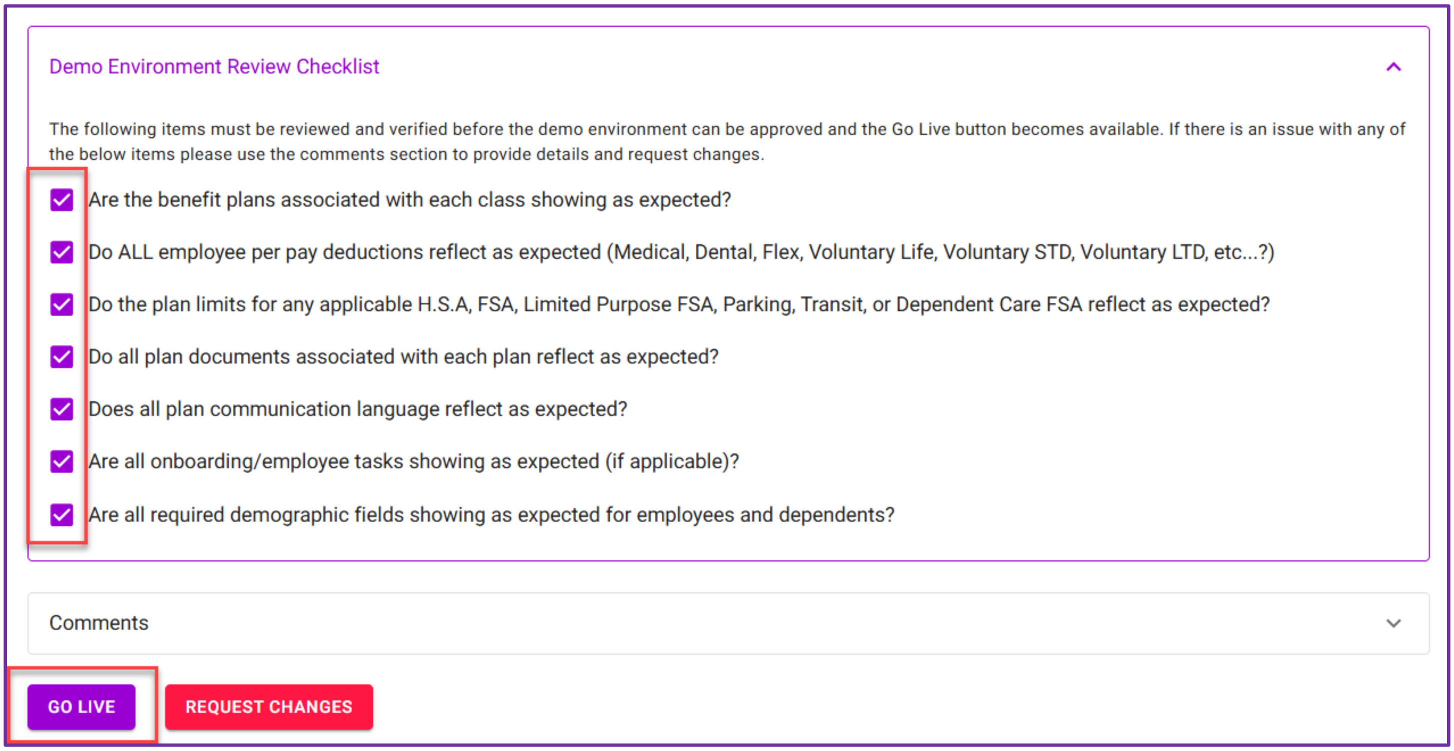
- Once the Client Information and the Plans Checklist have been approved, it is time to set up the Demo Environment in the Benefit Administration System. On Step 5, the GA enters **testing details** such as demo users and instructions in the Demo Environment Notes section as well as any additional comments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

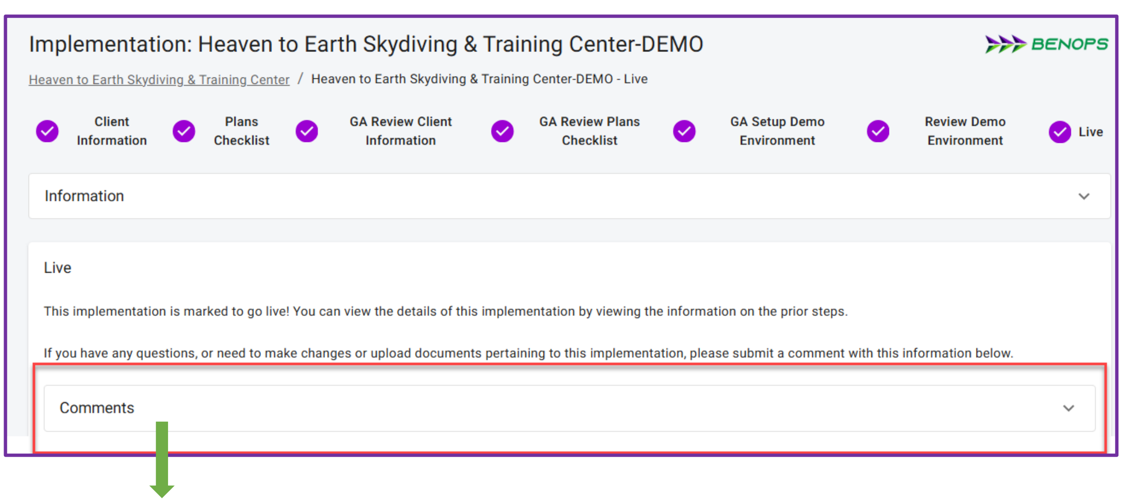


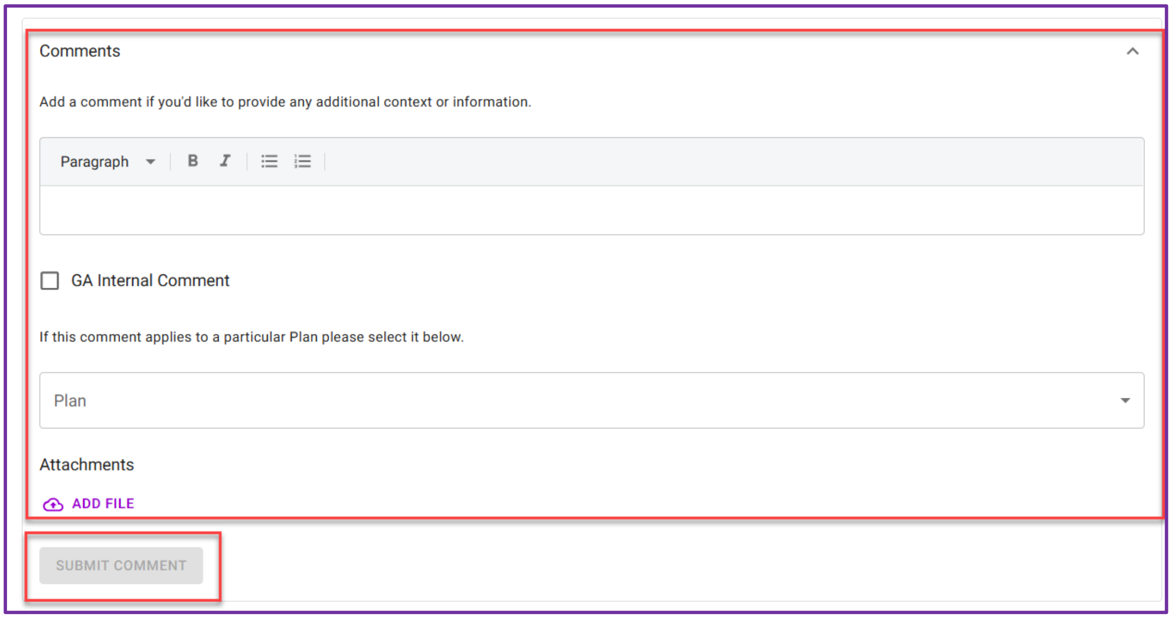


Step 7: Implementation Completion

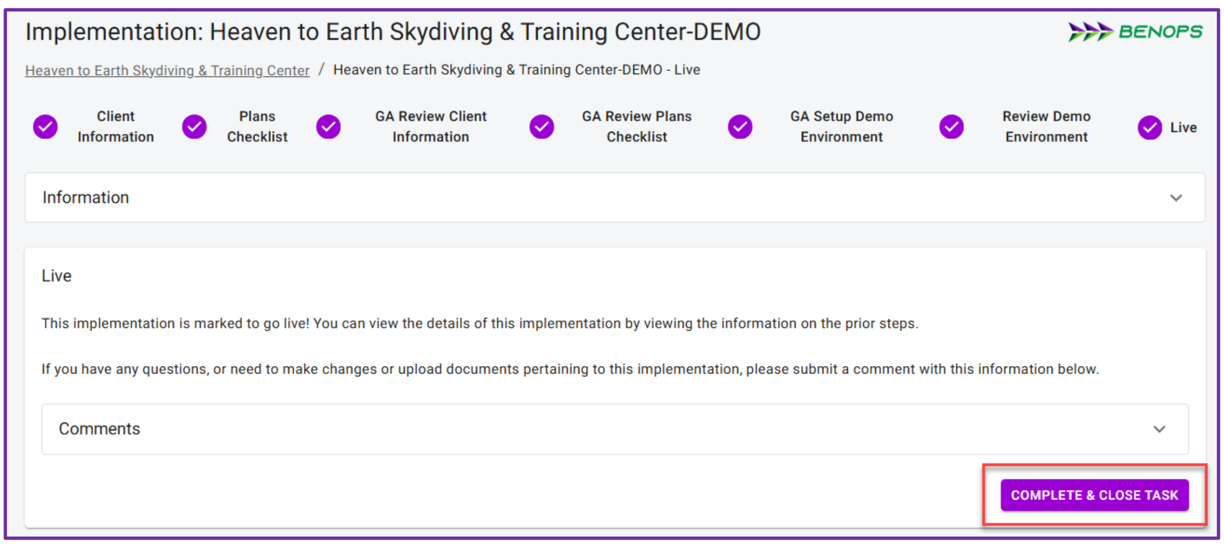
- Once live, the implementation is **locked**—previous steps cannot be reopened.
- Post-Go Live:

  Organization Contacts: The implementation 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 implementation 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 implementation complete. cycle.

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?

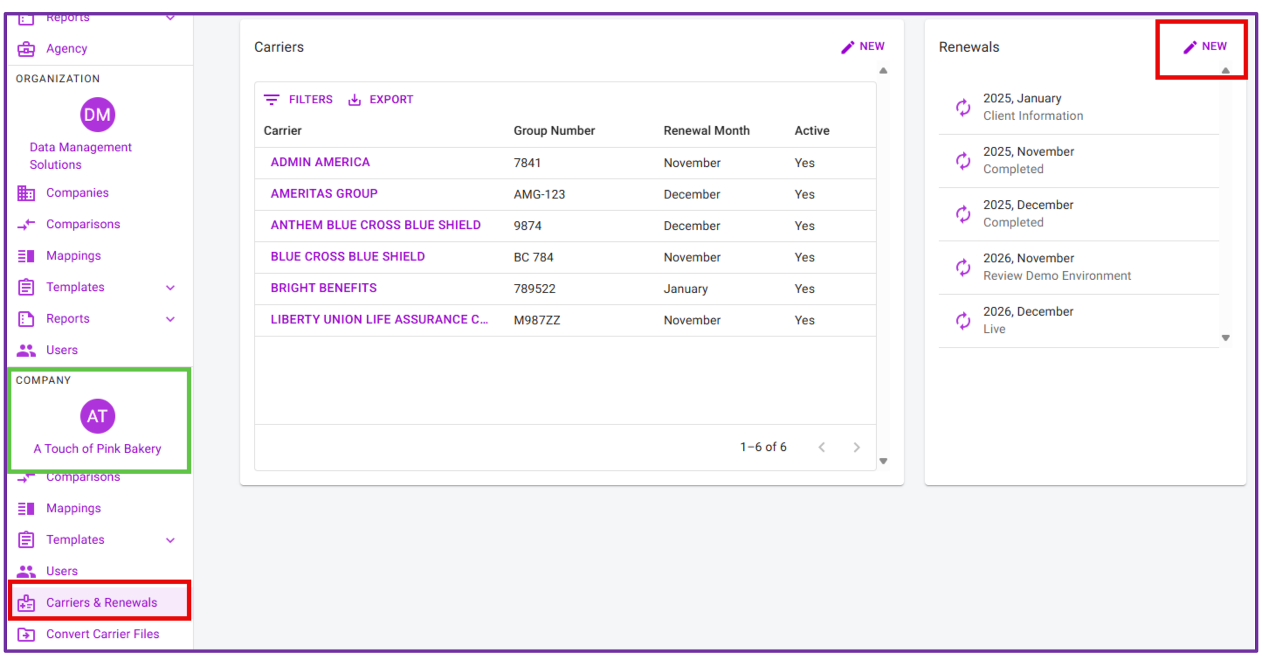
GA (General Agent) → Starts the renewal, reviews/approves, enters testing details, closes task.

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

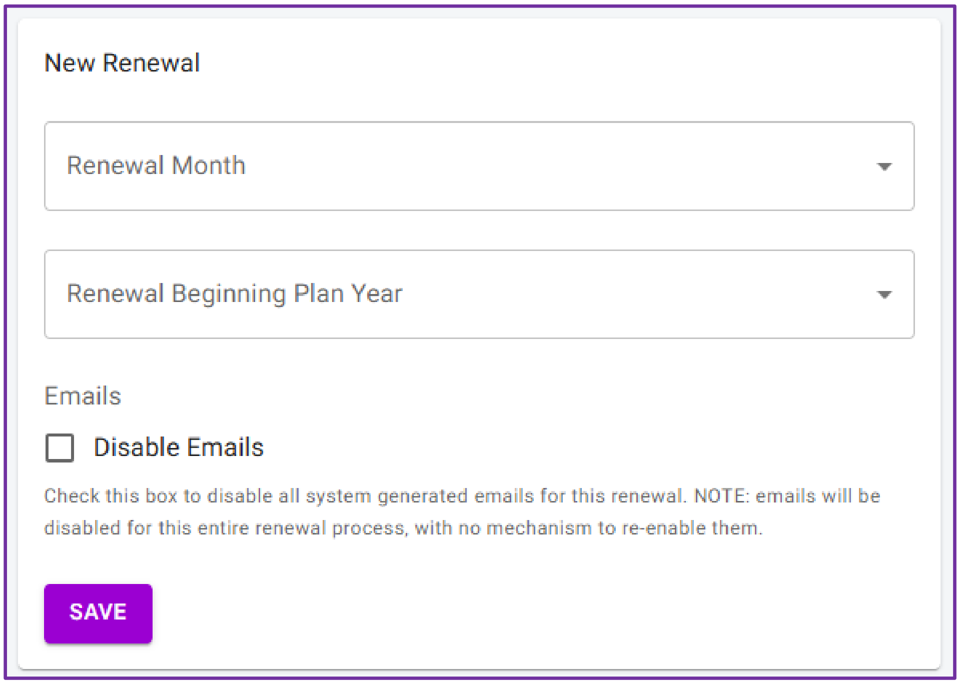
- GA logs into the **Streamline application**.
- Navigate to the company with the upcoming renewal.
- Click **Carriers & Renewals → New** under the Renewal section.



- Select the **Renewal Month** and **Renewal Beginning Plan Year**,

- Select **Disable Emails** if the user does not want any system-generated emails sent for a specific renewal.
  Please note: Once this option is selected, it cannot be changed. Emails will remain disabled for the duration of the renewal, and there is no option to re-enable them.

- Click **Save**.



- **<u>IF DISABLE EMAILS IS NOT CHECKED</u>**, 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.

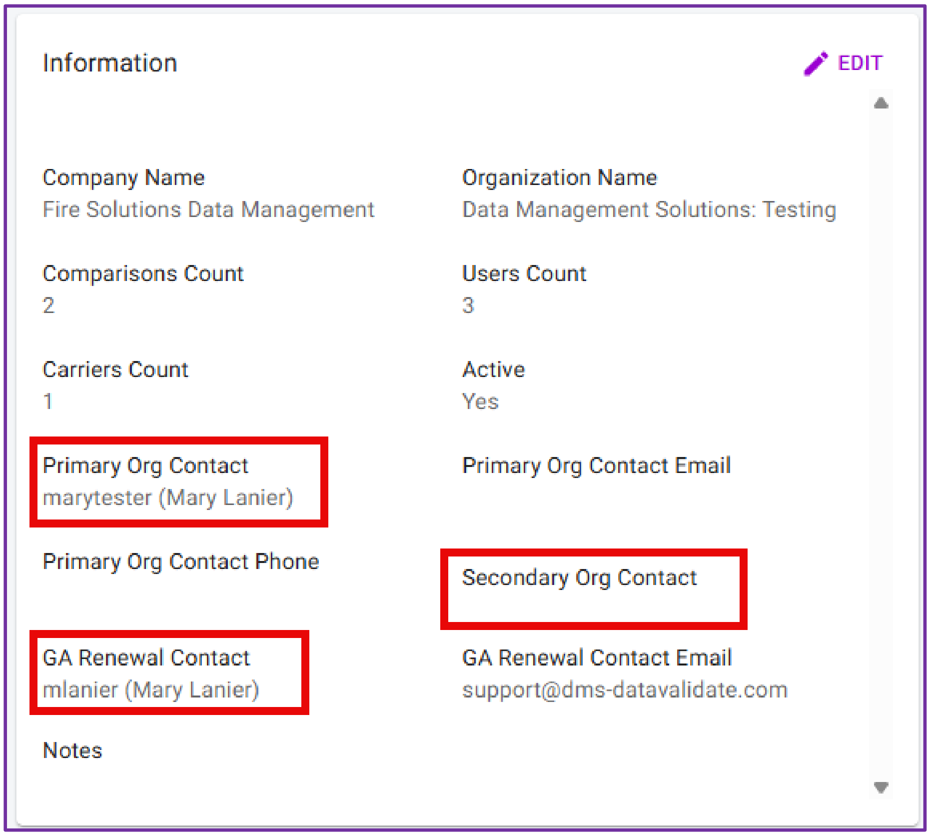
We look forward to partnering with you to ensure a smooth and timely renewal for Full Stack Pancake Diner. If this request should be directed to another contact, please provide their information in the comments. We'll be happy to reassign the task accordingly.

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

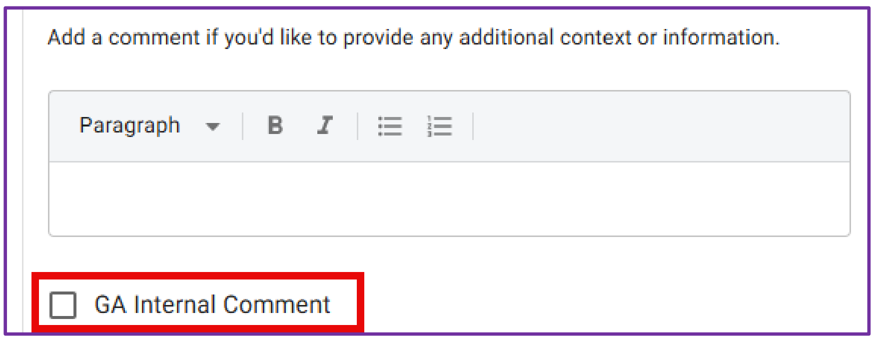
Note: Organization contacts and GA Renewal Contact can be found on the Company Detail page.



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

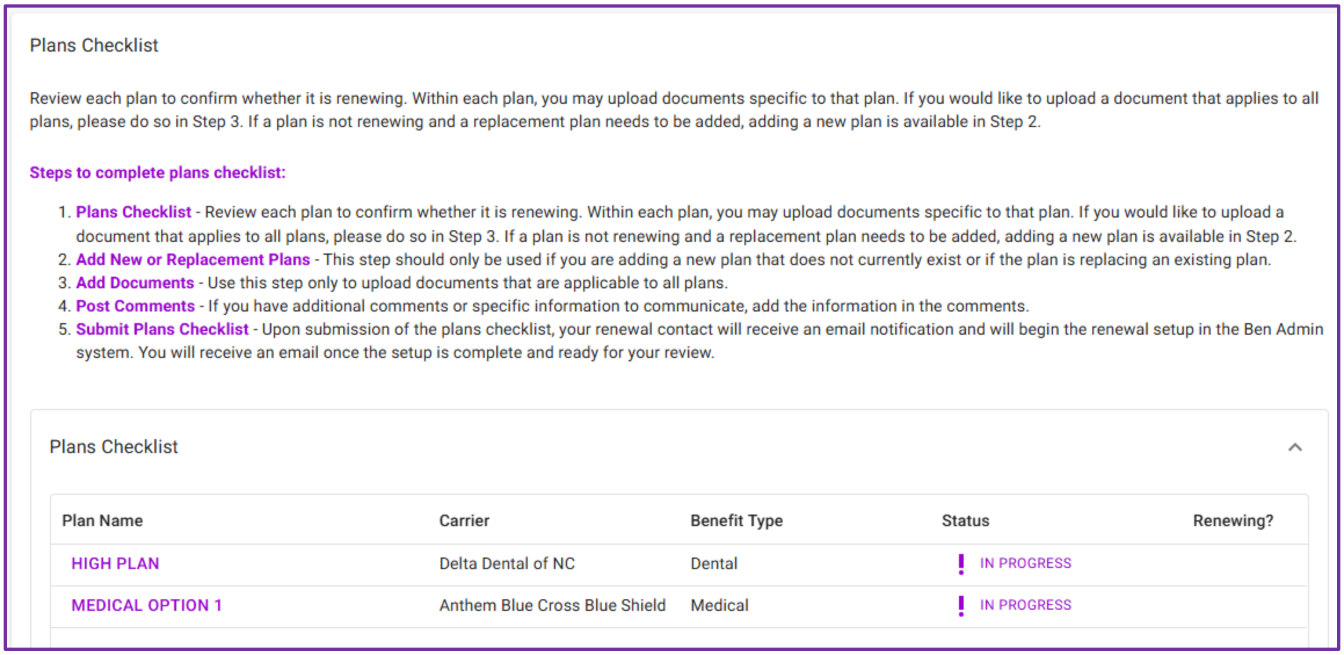
If email language varies by classification please specify for each

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:



Plans Checklist

Review each plan to confirm whether it is renewing. Within each plan, you may upload documents specific to that plan. If you would like to upload a document that applies to all plans, please do so in Step 3. If a plan is not renewing and a replacement plan needs to be added, adding a new plan is available in Step 2.

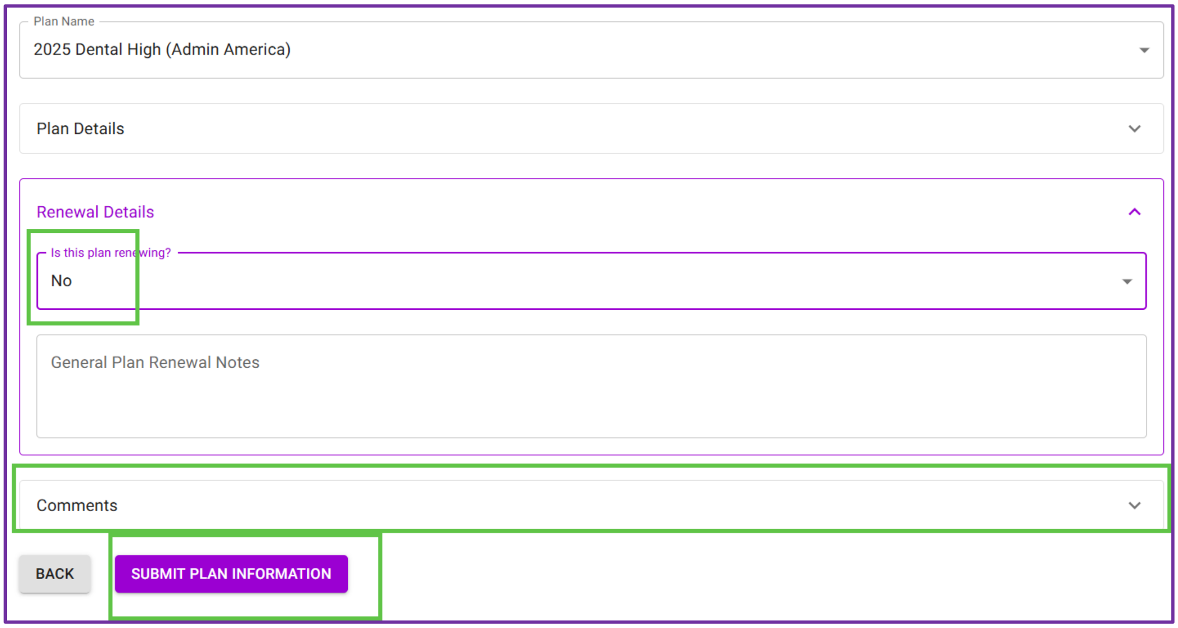
Steps to complete plans checklist:

1. **Plans Checklist** - Review each plan to confirm whether it is renewing. Within each plan, you may upload documents specific to that plan. If you would like to upload a document that applies to all plans, please do so in Step 3. If a plan is not renewing and a replacement plan needs to be added, adding a new plan is available in Step 2.
2. **Add New or Replacement Plans** - This step should only be used if you are adding a new plan that does not currently exist or if the plan is replacing an existing plan.
3. **Add Documents** - Use this step only to upload documents that are applicable to all plans.
4. **Post Comments** - If you have additional comments or specific information to communicate, add the information in the comments.
5. **Submit Plans Checklist** - Upon submission of the plans checklist, your renewal contact will receive an email notification and will begin the renewal setup in the Ben Admin system. You will receive an email once the setup is complete and ready for your review.

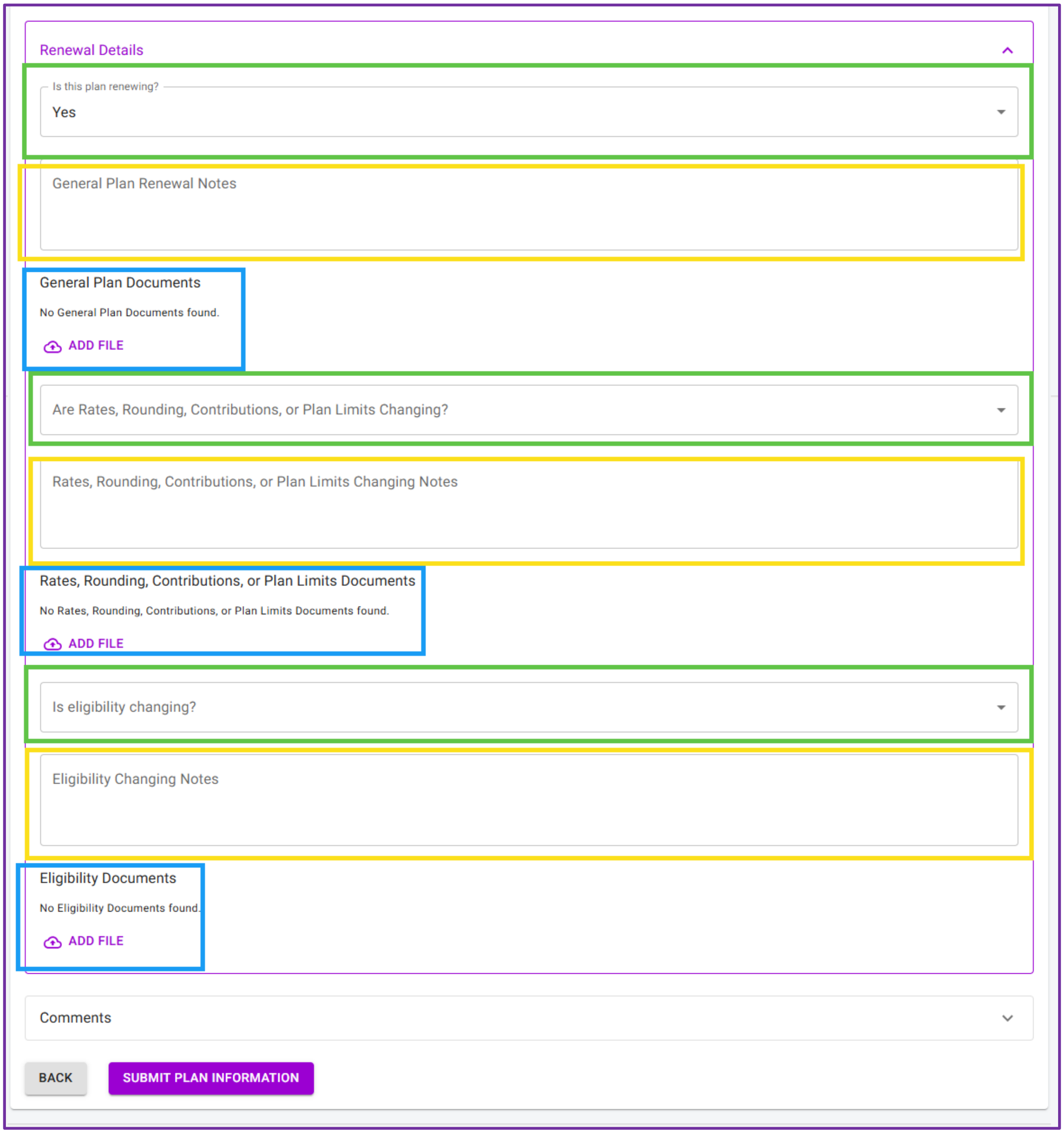
Plans Checklist

Plan Name	Carrier	Benefit Type	Status	Renewing?
HIGH PLAN	Delta Dental of NC	Dental	! IN PROGRESS	
MEDICAL OPTION 1	Anthem Blue Cross Blue Shield	Medical	! IN PROGRESS	

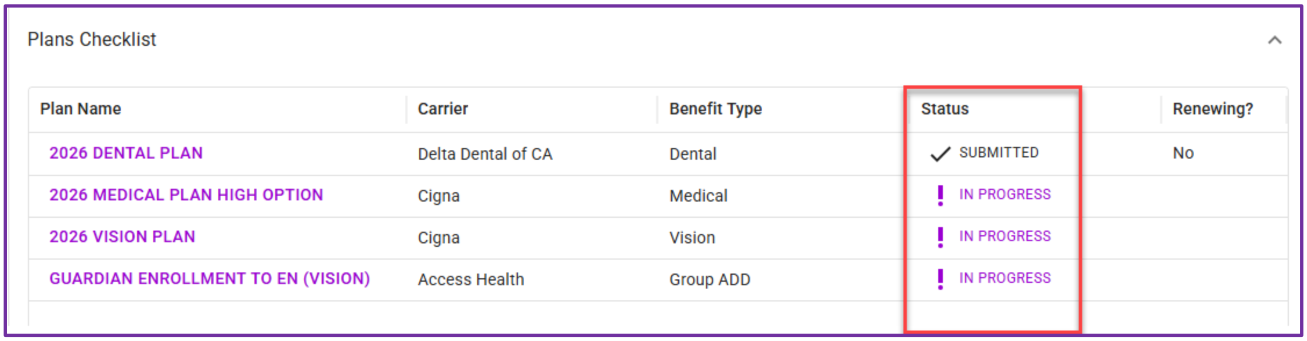
  - If **not renewing** →
    - Select NO and add additional information to the General Plan Renewal Notes and/or Comments to indicate if the carrier is being replaced by another or any other pertinent information for the GA contact.
    - Click **Submit Plan Information** (status changes to Submitted).



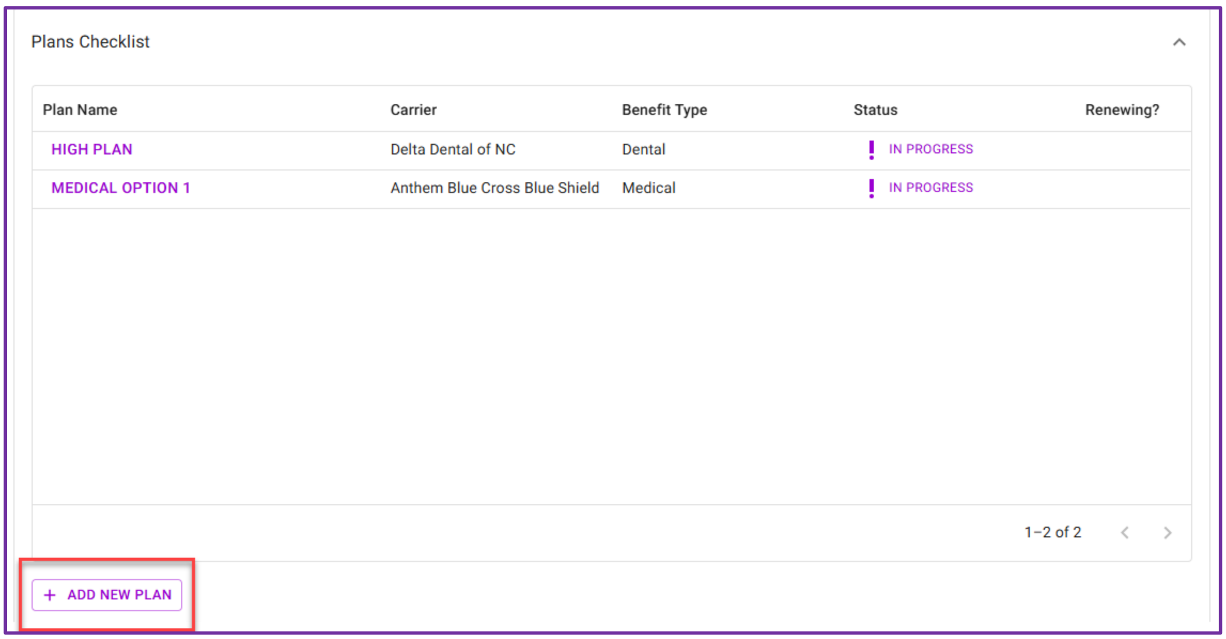
- If **renewing** →
  - Answer additional questions for the rates, rounding, limits, contributions section, and the eligibility section.
- Upload supporting documents as needed
- Add additional pertinent information in the Comment section



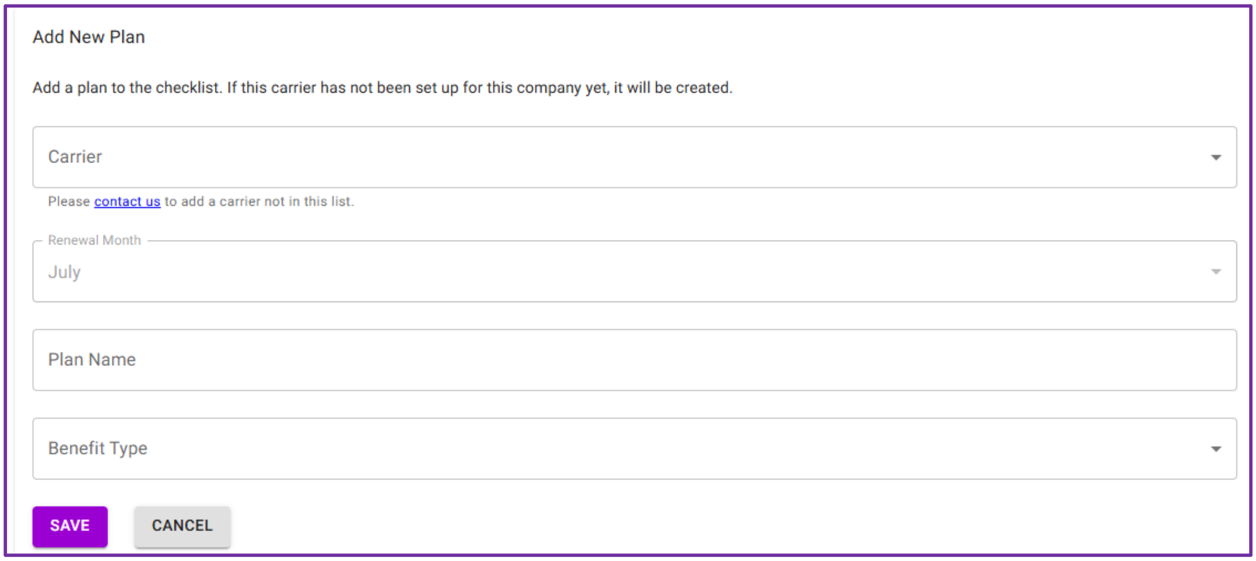
- Click **SUBMIT PLAN INFORMATION** once all selections have been made for the specific plan.
- Repeat the process above for each plan listed until all statuses have been changed from IN PROGRESS to SUBMITTED.



- If **adding new or replacement plans →**
  - Click ADD NEW PLAN

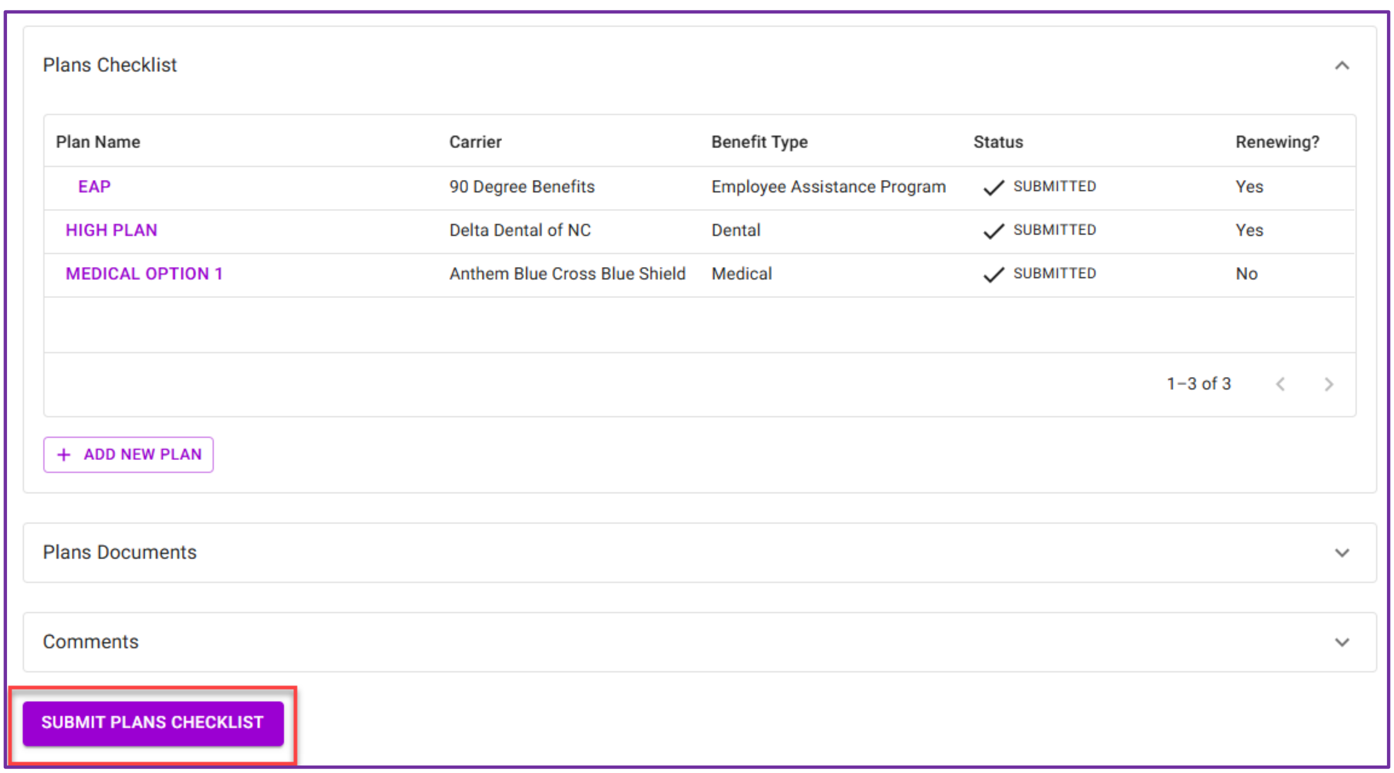


  - Select Carrier
  - The Renewal Month will default to the current renewal month
  - Add Plan Name
  - Select Benefit Type and then SAVE



- After clicking SAVE, the renewal details form will appear, complete all required fields using the same process above for: If **renewing** →

- **Plans Documents** includes an upload option for files that apply to all plans. This allows users to upload shared documents once, eliminating the need to upload the same file separately for each plan.
- Once all plans are submitted, add any applicable comments and then click **Submit Plans Checklist** → GA is notified by an email.

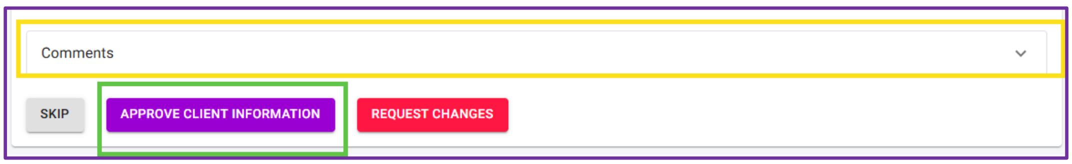

Plans Checklist

Plan Name	Carrier	Benefit Type	Status	Renewing?
EAP	90 Degree Benefits	Employee Assistance Program	✓ SUBMITTED	Yes
HIGH PLAN	Delta Dental of NC	Dental	✓ SUBMITTED	Yes
MEDICAL OPTION 1	Anthem Blue Cross Blue Shield	Medical	✓ SUBMITTED	No

Step 4: GA Reviews & Collaborates

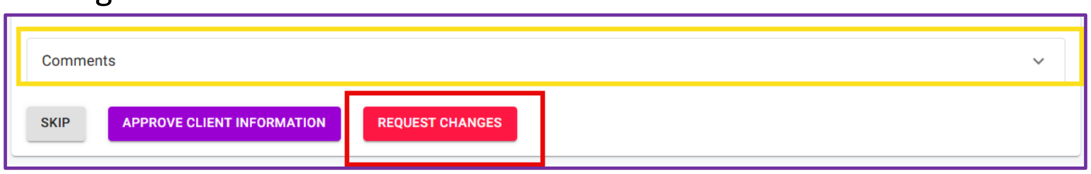
- GA will receive an email when the Organization contact completes the Client Information and/or Plans Checklist.
  - **GA Review Client Information – Approval**

    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**.



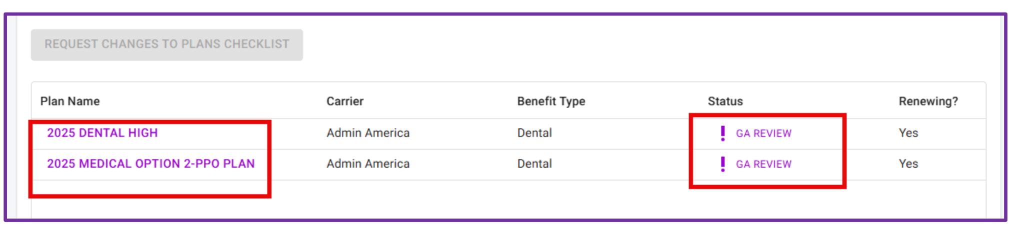
  - **GA Review Client Information – Request Changes**

    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

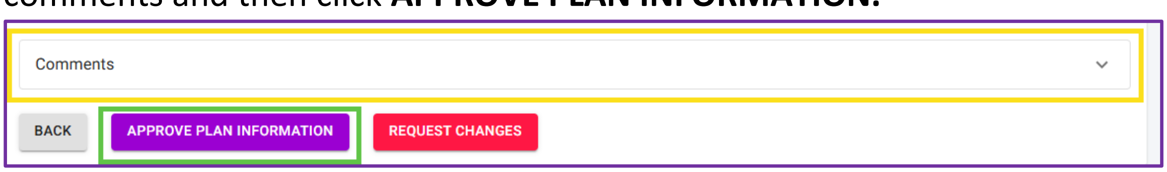


  - **GA Review Plans Checklist – Approval**

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

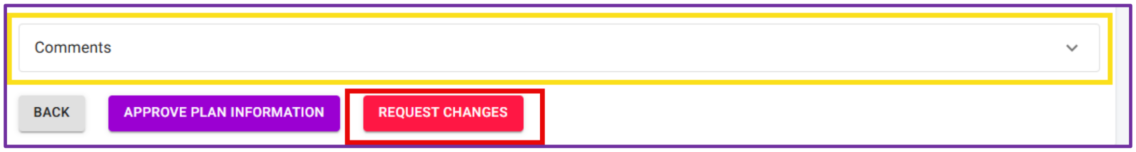


    If all required information and documents have been provided by the organization contacts and no further details are needed, the GA should add any desired comments and then click **APPROVE PLAN INFORMATION.**



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

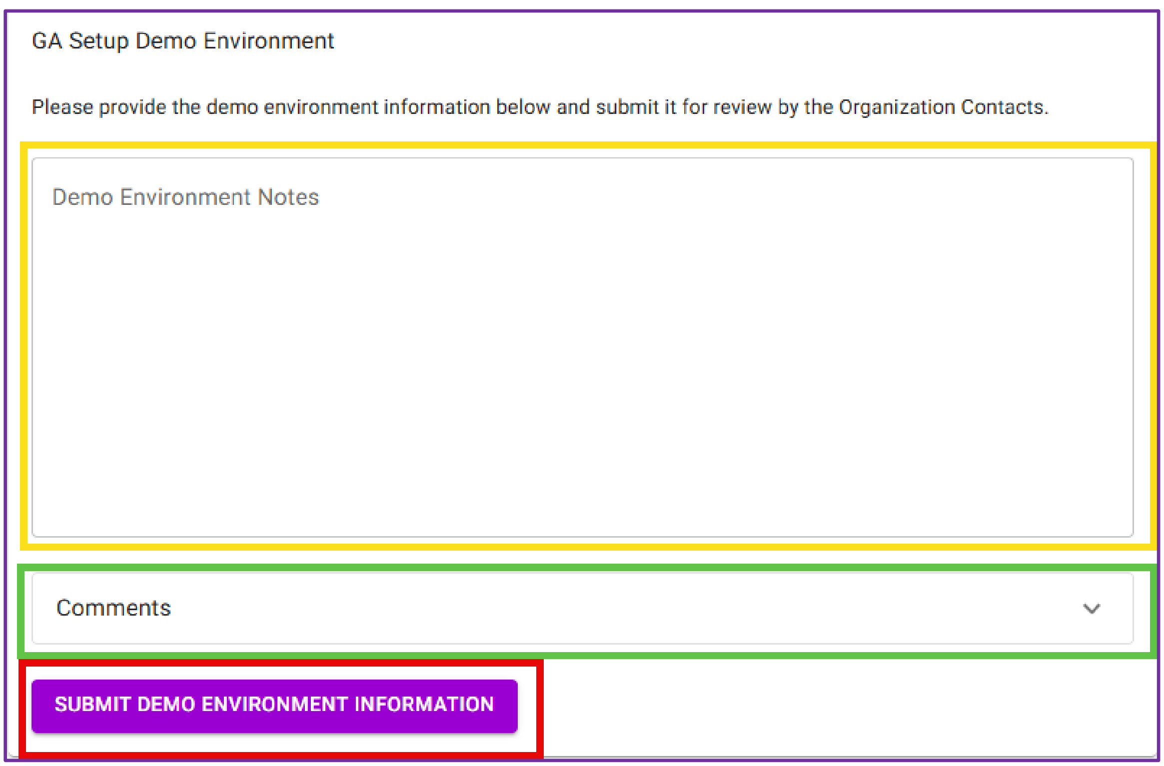
  If additional information or clarification is needed, the GA should add a comment and then click **REQUEST CHANGES**. This will send an email with the comment to the organization contacts



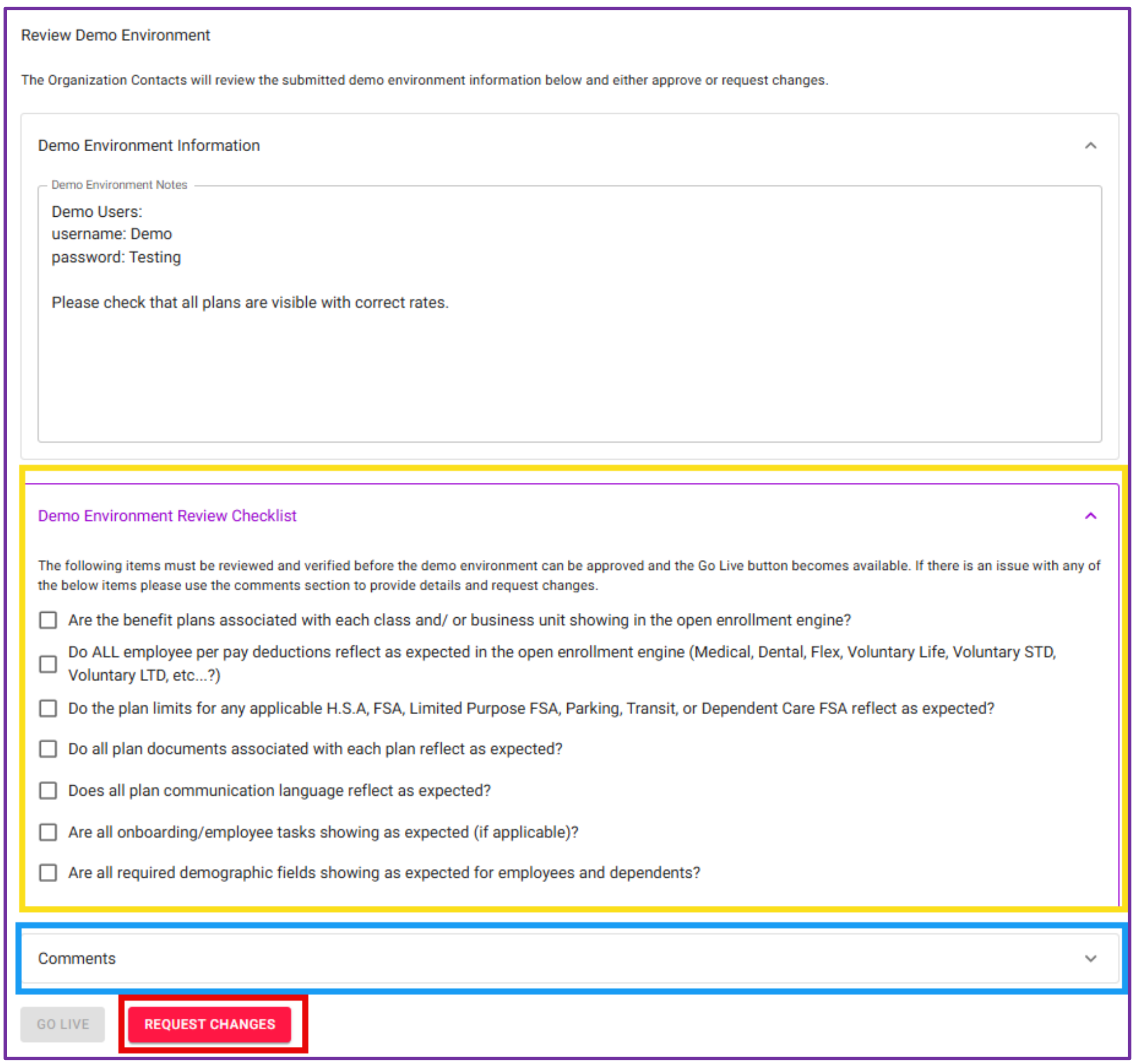
- When all plans have been approved, click **APPROVE PLANS CHECKLIST**.
- Collaboration continues until both steps are approved.

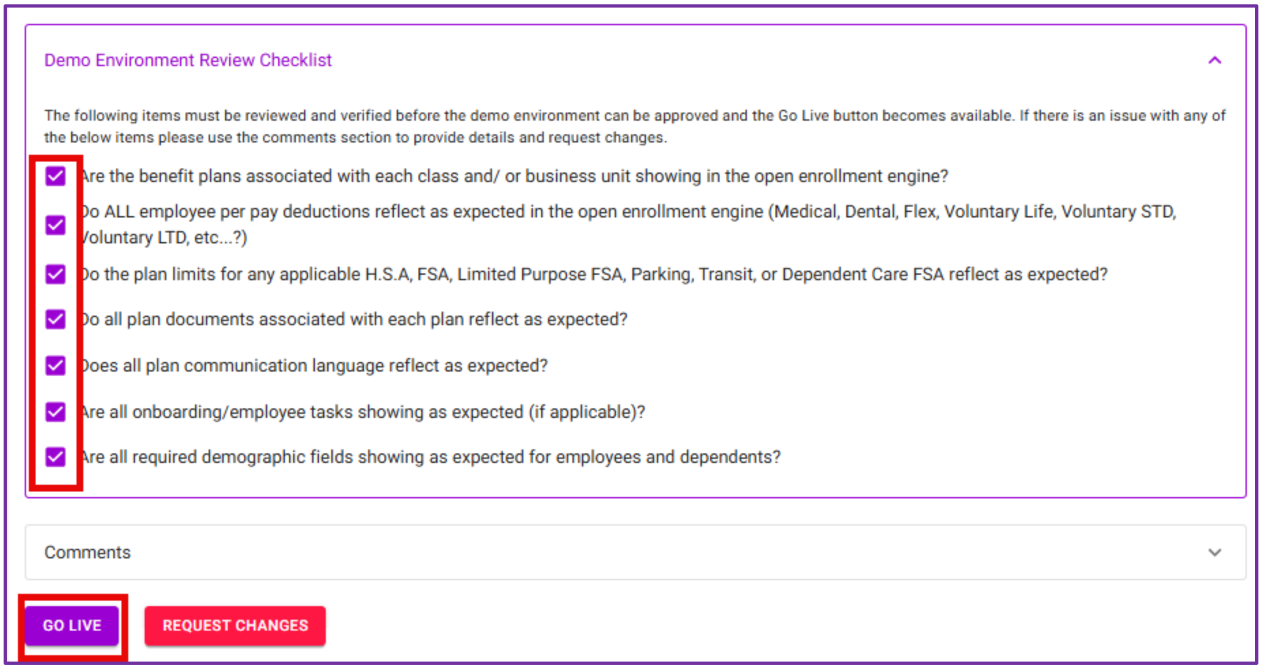
Steps 5 & 6: Testing & Go Live

- 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).

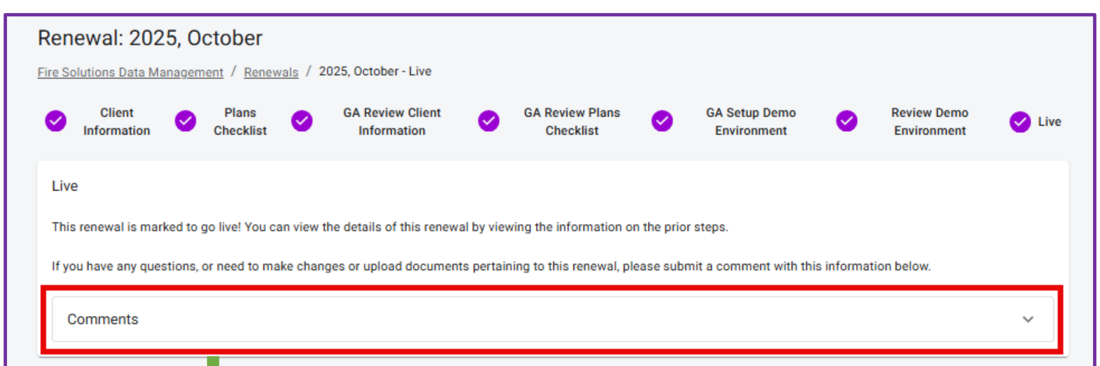


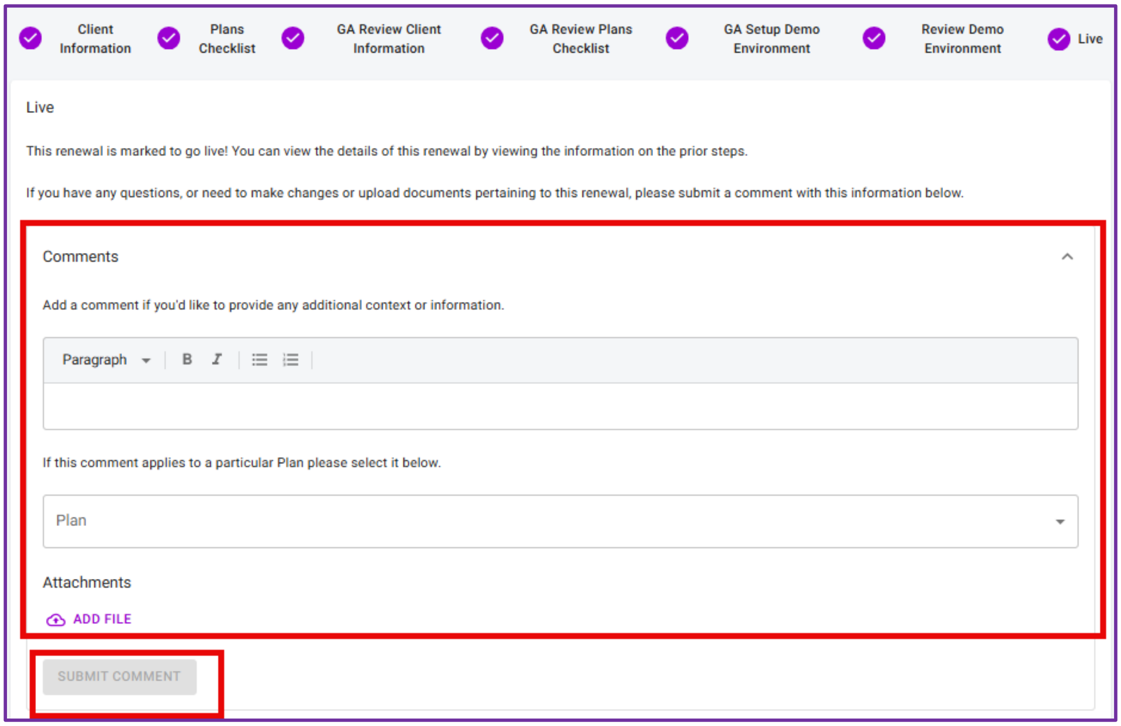


Step 7: Renewal Completion

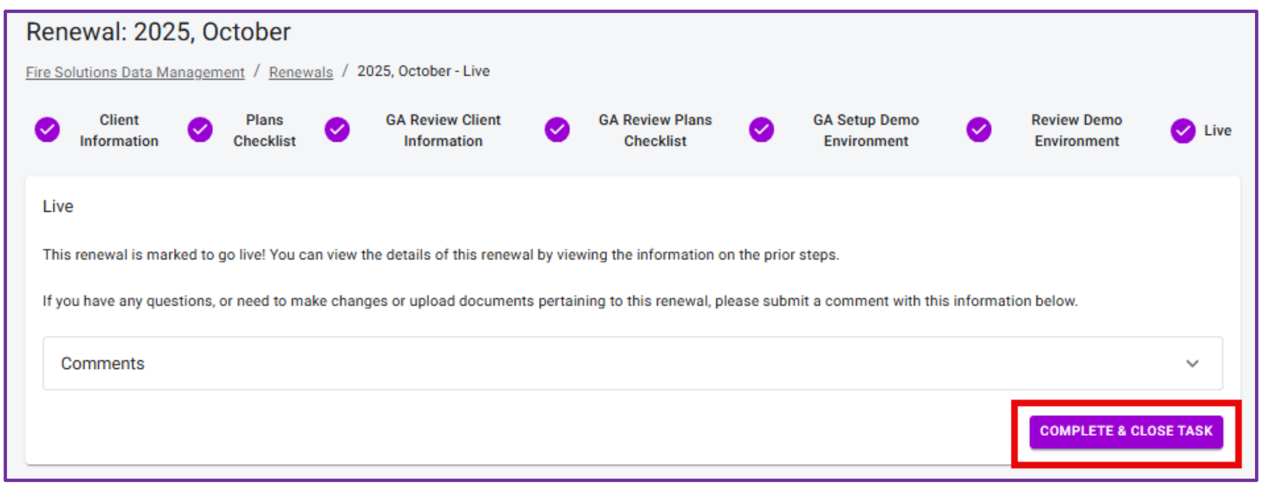
- Once live, the renewal is **locked**—previous steps cannot be reopened.
- Post-Go Live:

  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.

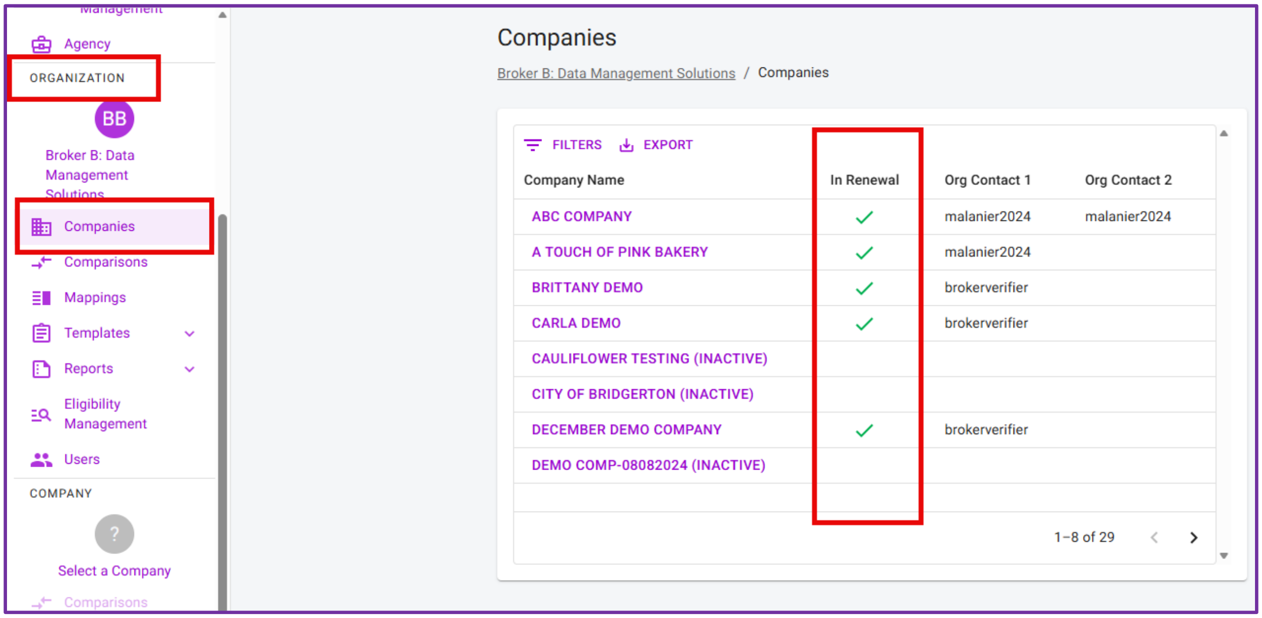


- A **final closeout email** is sent, marking the renewal complete and ready for the next cycle.

✅ 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, carrier error reports, and issues related to carrier files.

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. **All task types can be created by an Agency User** and may be created at **three levels**:

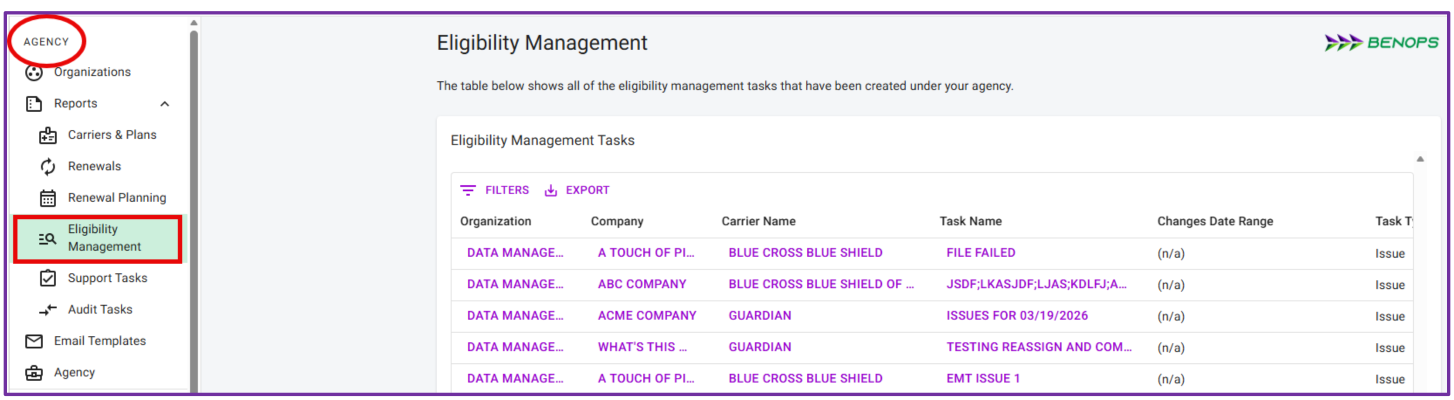
- **Organization level**
- **Company Level**
- **Company Carrier level**

However, Organization users now have the ability to create an Issue Type that is automatically assigned to the Agency default email address.

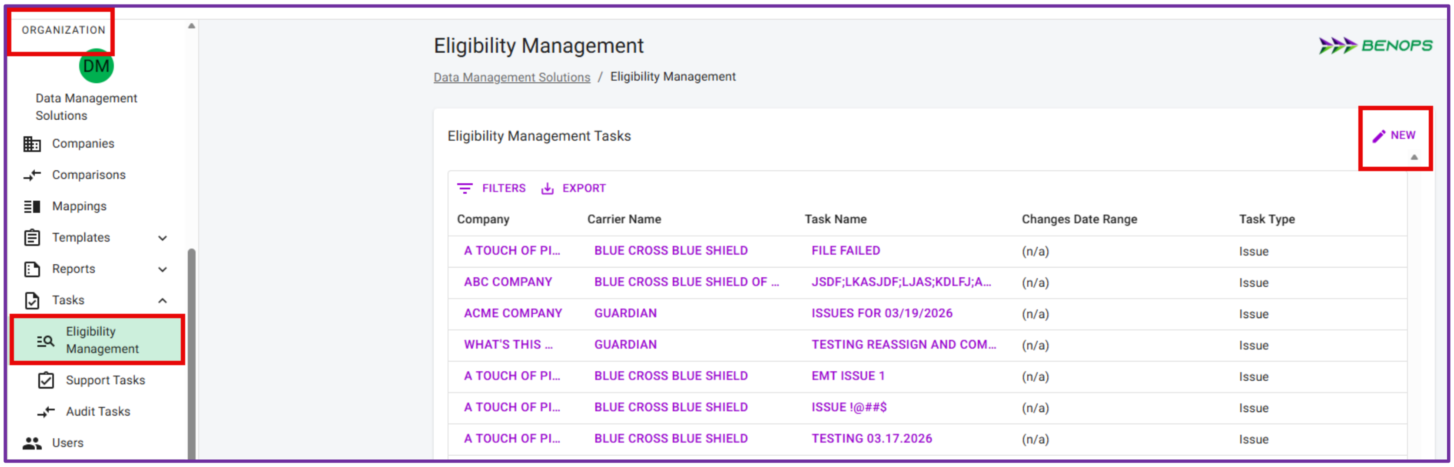
Tasks **cannot** be created at the Agency level, although they **can be viewed and exported** there.

Eligibility Management Tracking Tables:

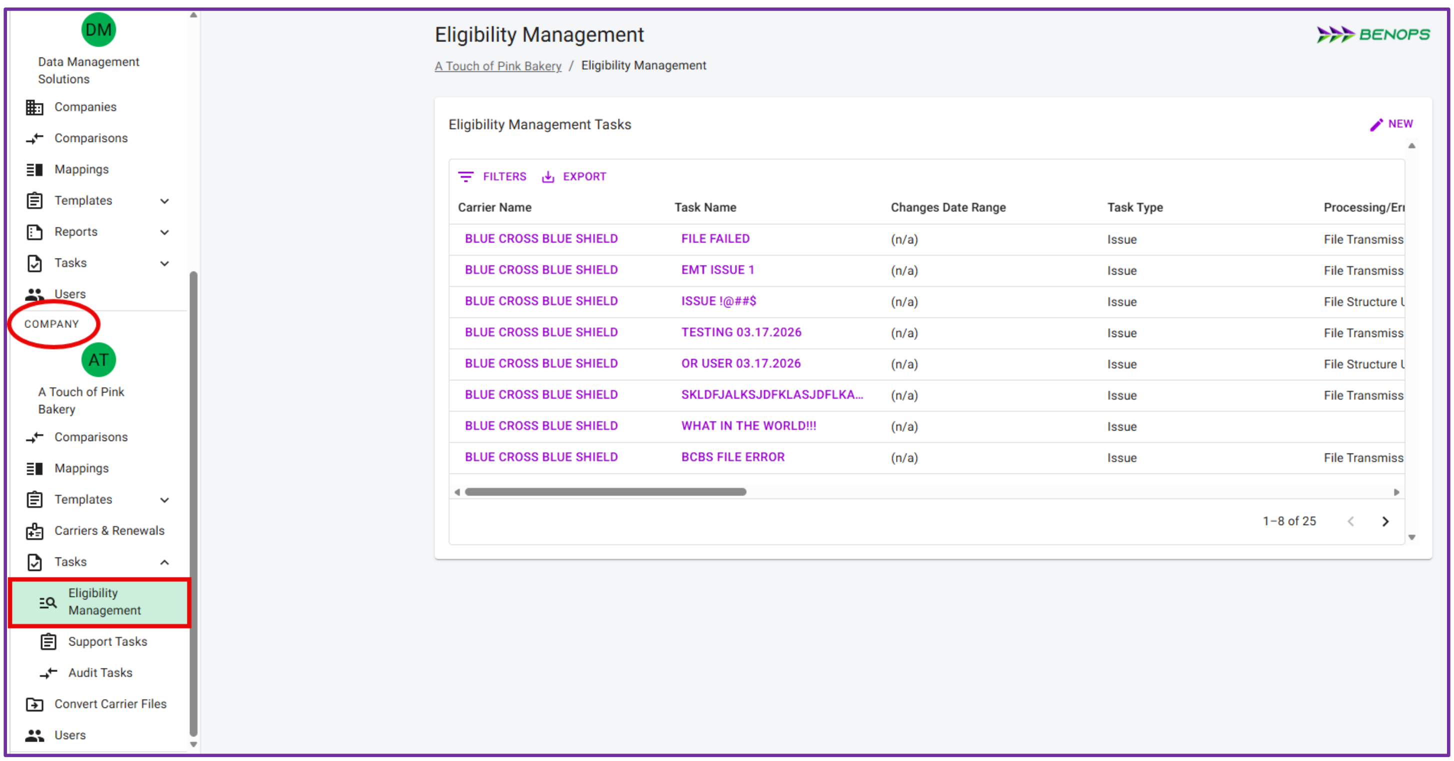
Agency:



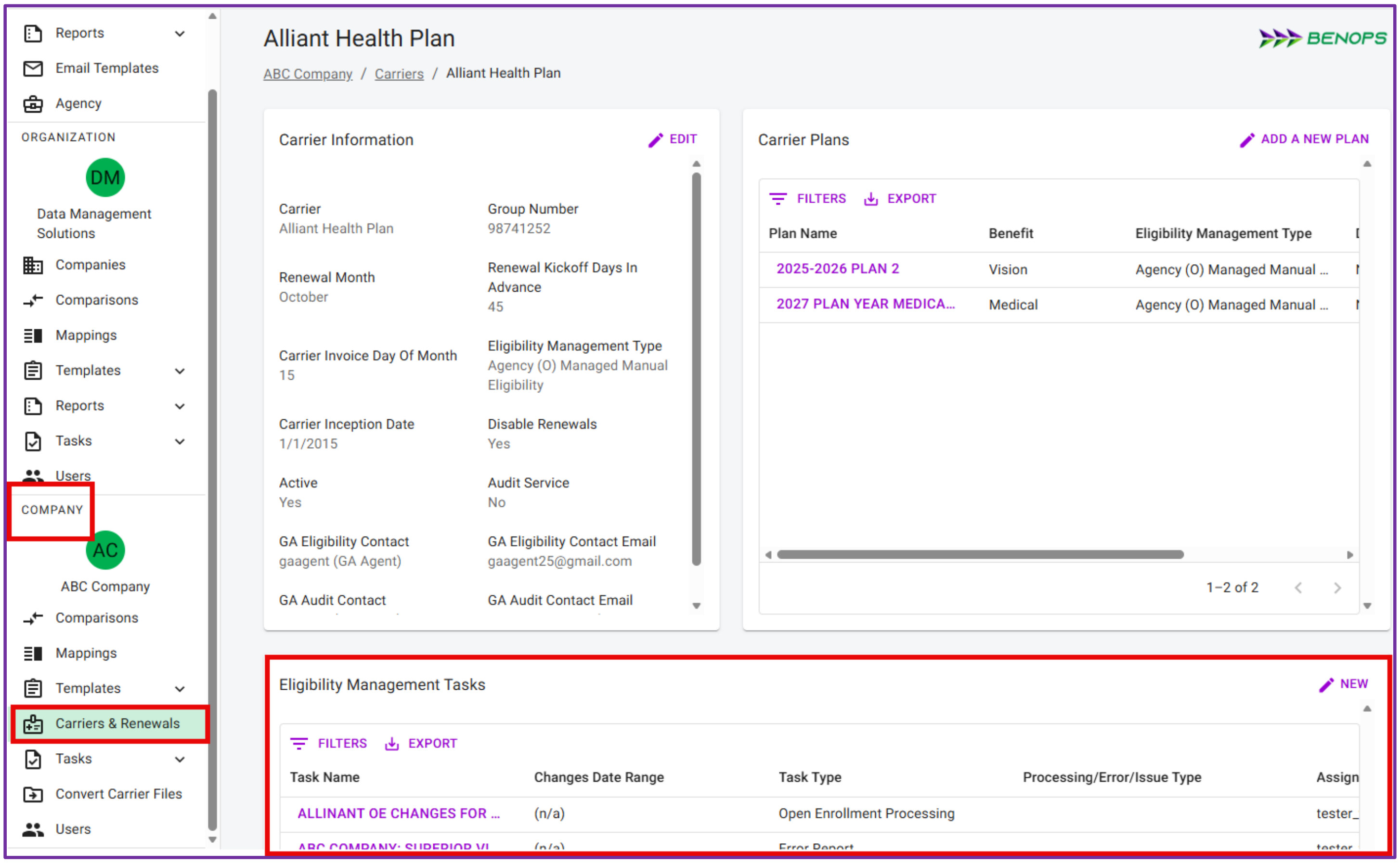
Organization:



Company:



Company Carrier Level:

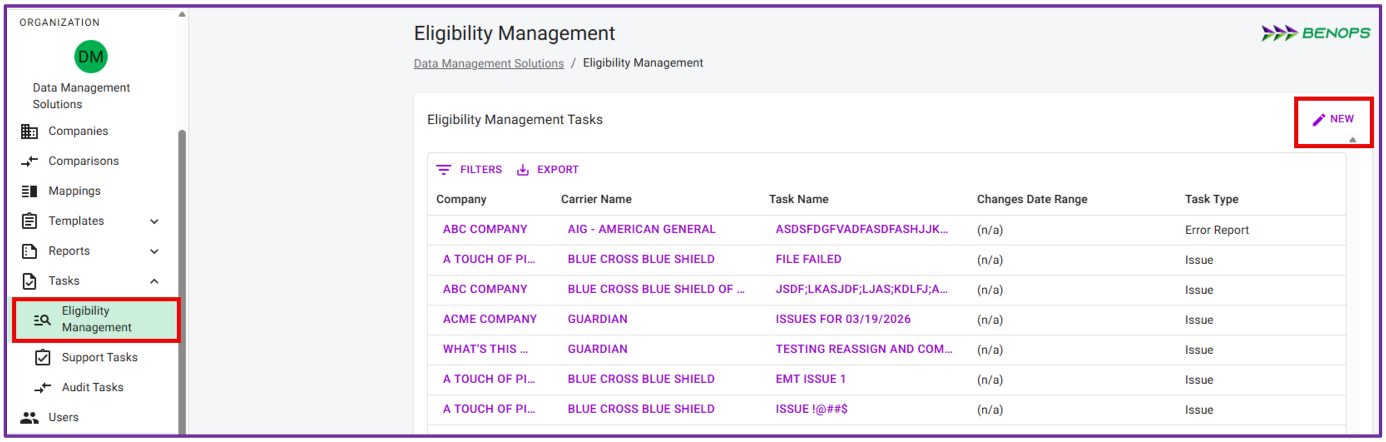


The fields presented will vary slightly depending on where the task is created and what task and issue type is selected.

- 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

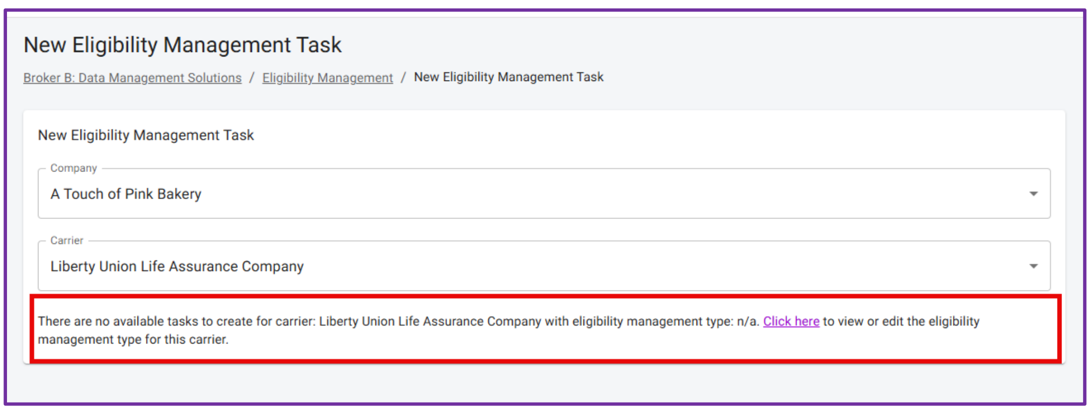
1. **Navigate to the organization or company** where the task will be created.
2. Select **Eligibility Management** from the left menu under **TASKS**, then click **NEW**.



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.

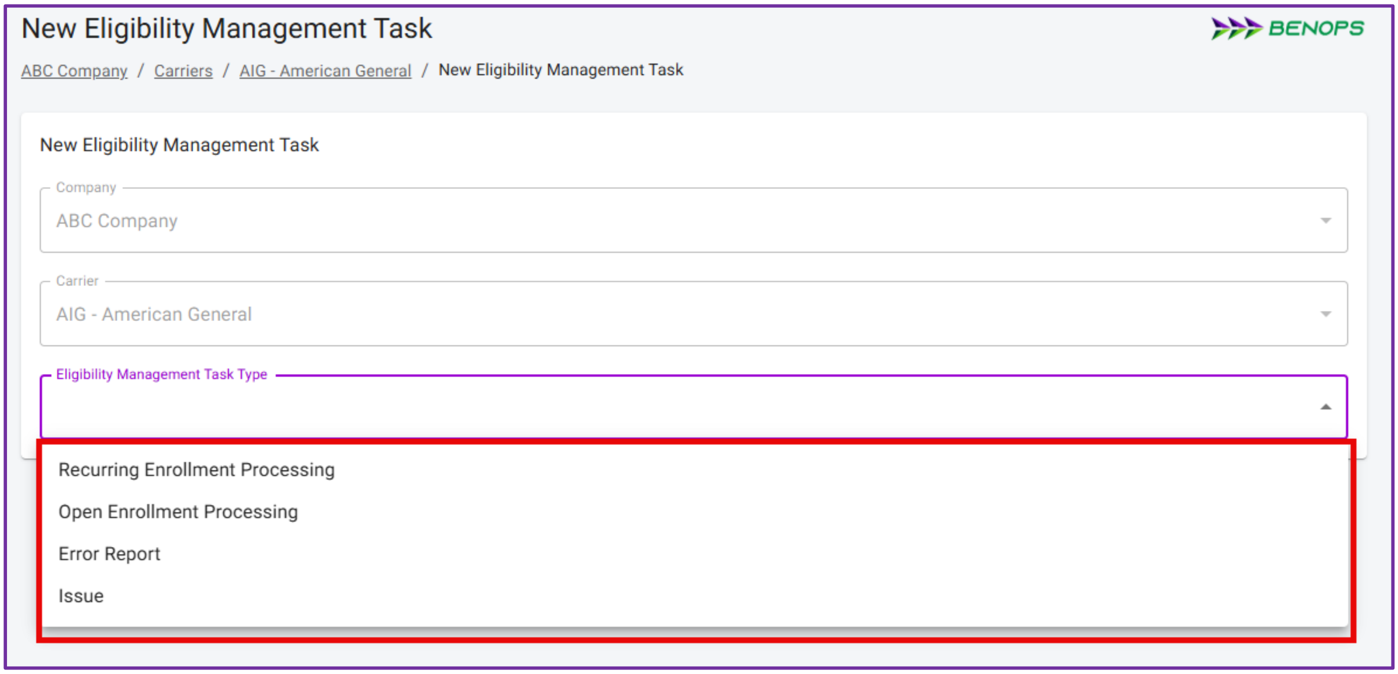
If you see the highlighted message indicating the eligibility type is not supported, the type must be updated before a task can be created. This typically indicates that the field is blank.



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*

TASK CREATOR: Will default to the user creating task and cannot be changed.

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.

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**

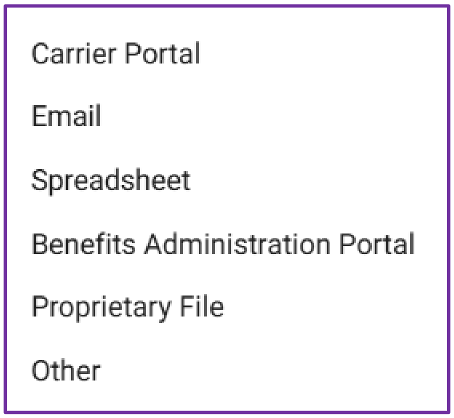
***** If open enrollment changes, the changes from and to ARE OPTIONAL. However, it is recommended to use the first day of the new plan year. Example: November 2025 open enrollment will reflect 11/01/2025 as both the from and to date.**

Changes Source Type: Select how the changes are determined.

Manual 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. **Benefits Administration Portal –** changes submitted in Benefits Administration Portal
5. **Proprietary File –** changes submitted via a proprietary file
6. **Other** – any method not covered above



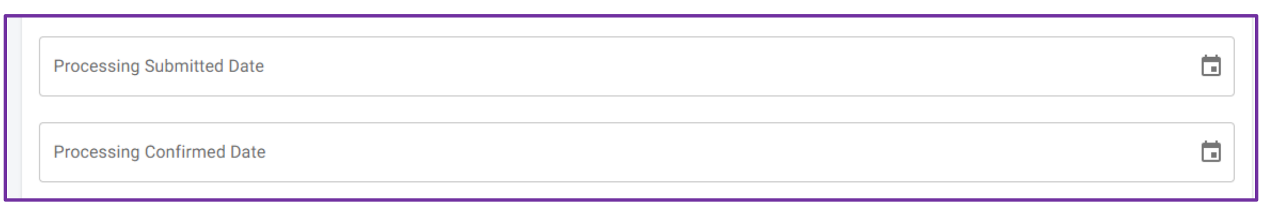
Required Counts for Completion:

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*

TASK CREATOR: Will default to the user creating task and cannot be changed.

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.

TASK CREATOR: Will default to the user creating task and cannot be changed.

ASSIGNEE: Select the user responsible for completing the task.

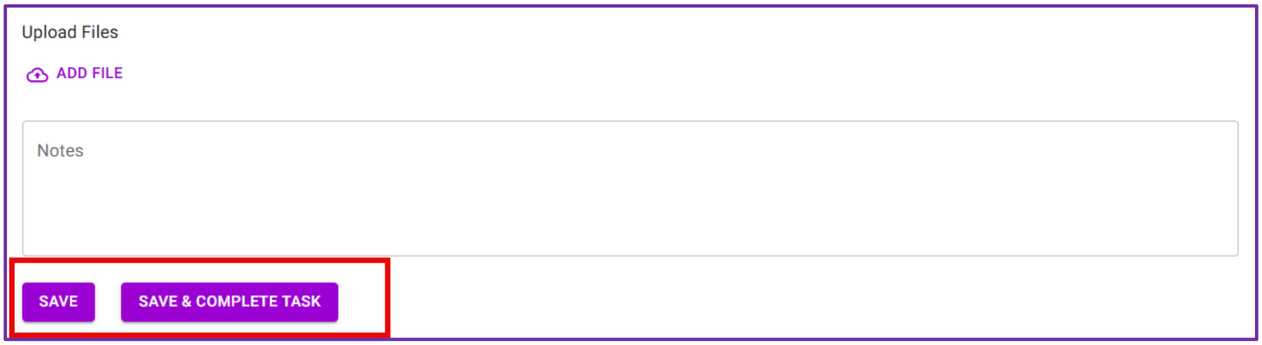
ISSUE TYPE: Select the issue for this task.

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

Final Steps for all Task Types

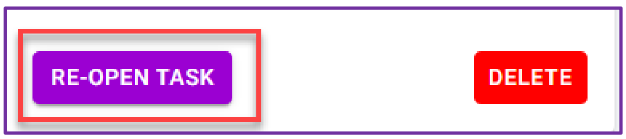
- Add any relevant details in the Comments and/or Supplemental Information sections.
- Click **SAVE** or **SAVE & COMPLETE TASK**.

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

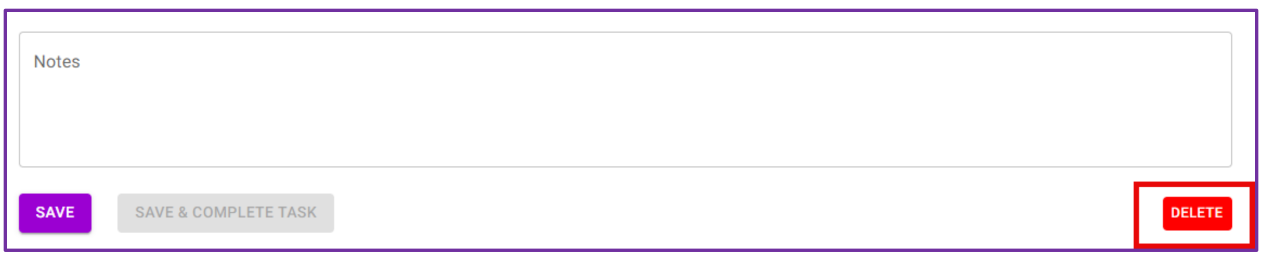


Important Notes

- A completed task can be reopened if necessary.



- 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
- Post Renewal
- Import Issue
- Renewal Notes
- Post Implementation
- Implementation Notes
- 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:

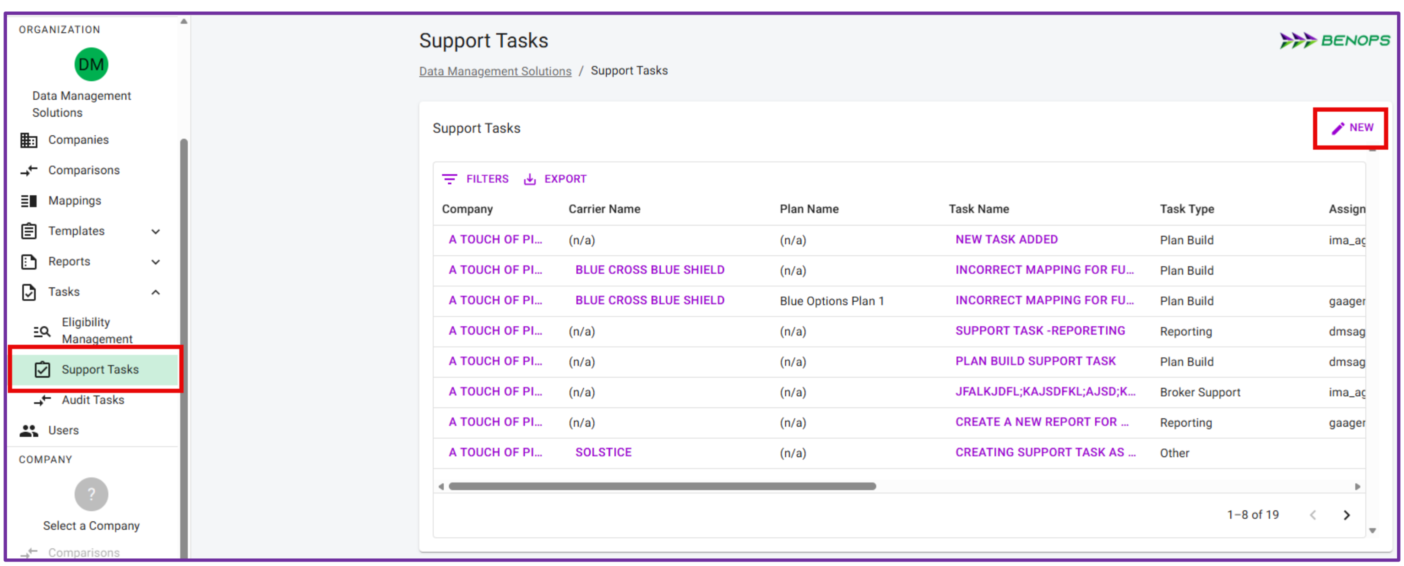
- Submitting an ACA-related question
- Reporting an incorrect plan build
- Requesting general broker or HR support

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.

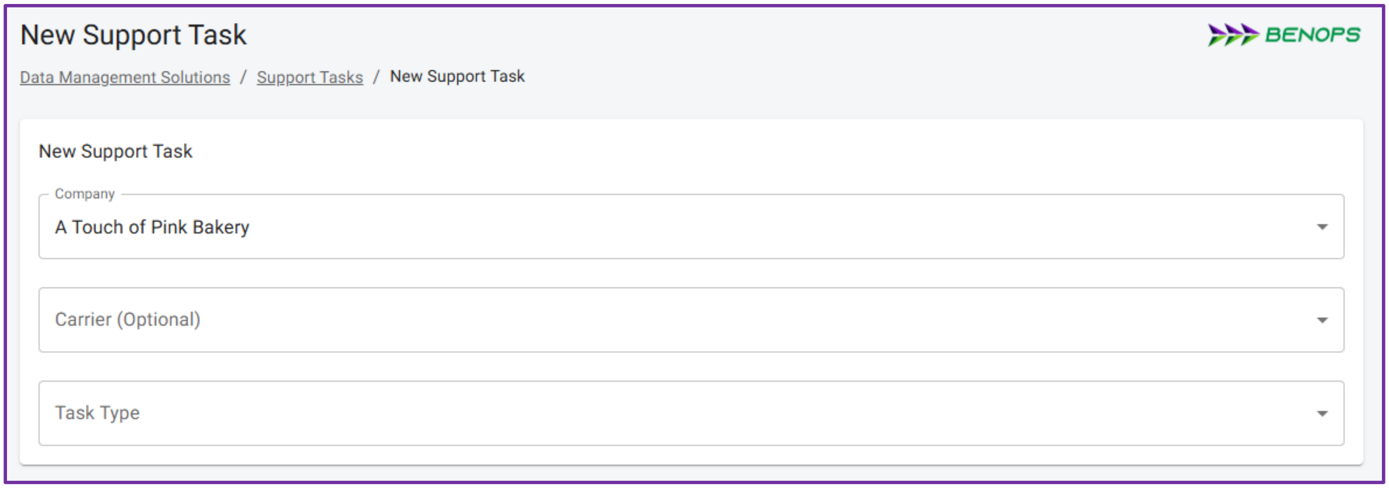
How It Works

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 **task type** from the dropdown.

Required Fields for Creating a Support Task

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

TASK CREATOR: Will default to the user creating task and cannot be changed.

ASSIGNEE: Select the user responsible for completing the task.

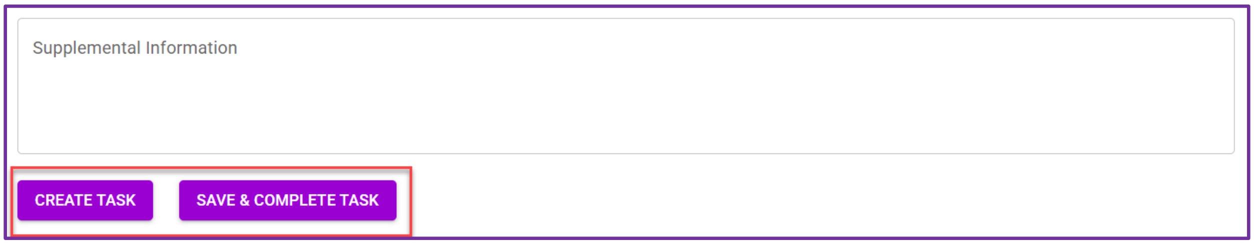
The assigned user will receive an email notification indicating that a new task has been assigned to them, along with a direct link to the task so they can access it without navigating through the application. If the assignee is changed after the task has been created—but before it is completed—the newly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

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 **CREATE TASK** or **SAVE & COMPLETE TASK**.

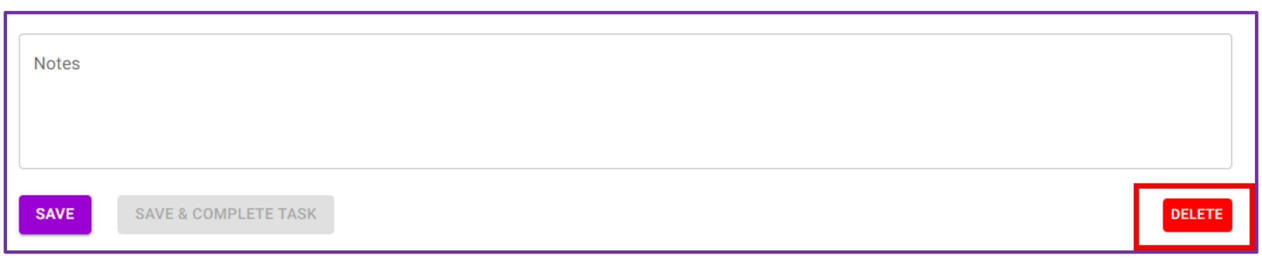
The **SAVE & COMPLETE TASK** button becomes enabled only when all required fields are completed based on the selected processing type.



Important Notes

- A completed task can be reopened if necessary.

- 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.

Audit Tasks are available with all subscription plans.

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**:

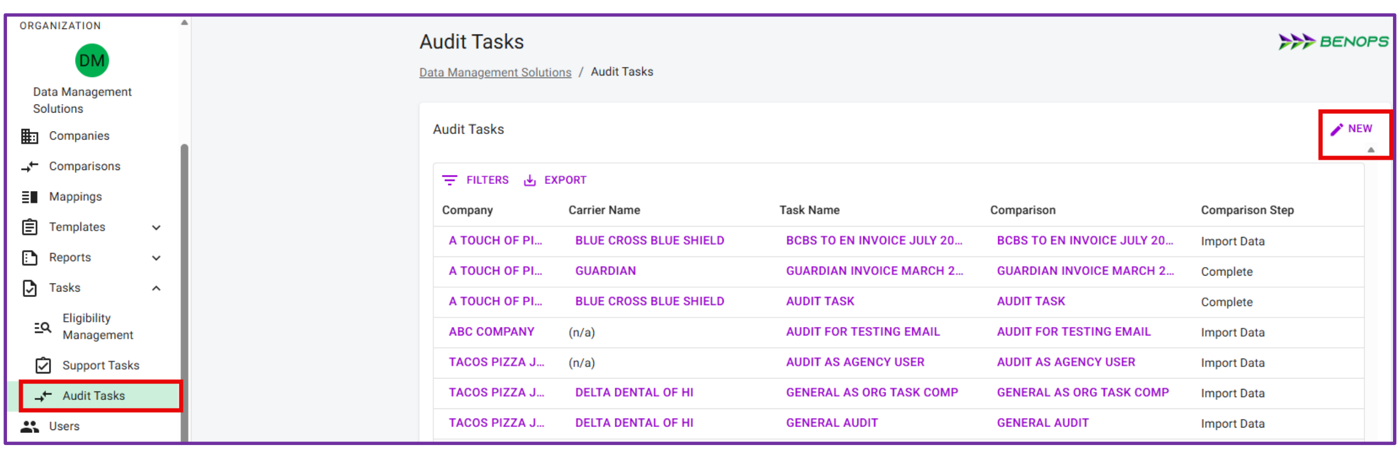
- The task is automatically assigned to the **designated Agency Support Email**
- **Agency users** can reassign the task as needed to ensure proper ownership and workflow management

After the comparison is completed:

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

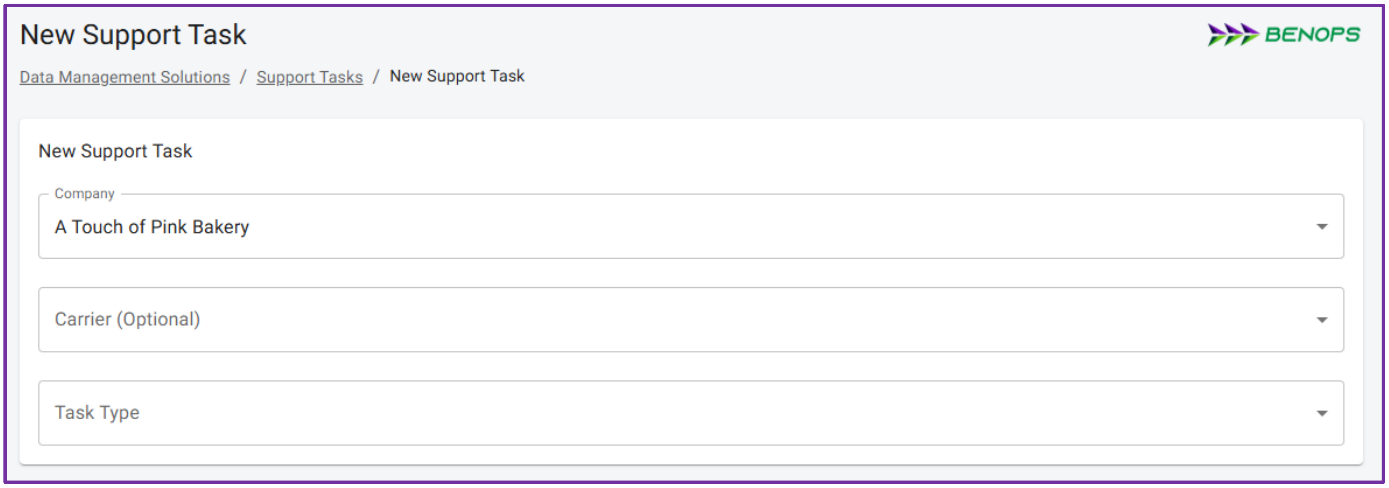
How It Works

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 task name (required per company).

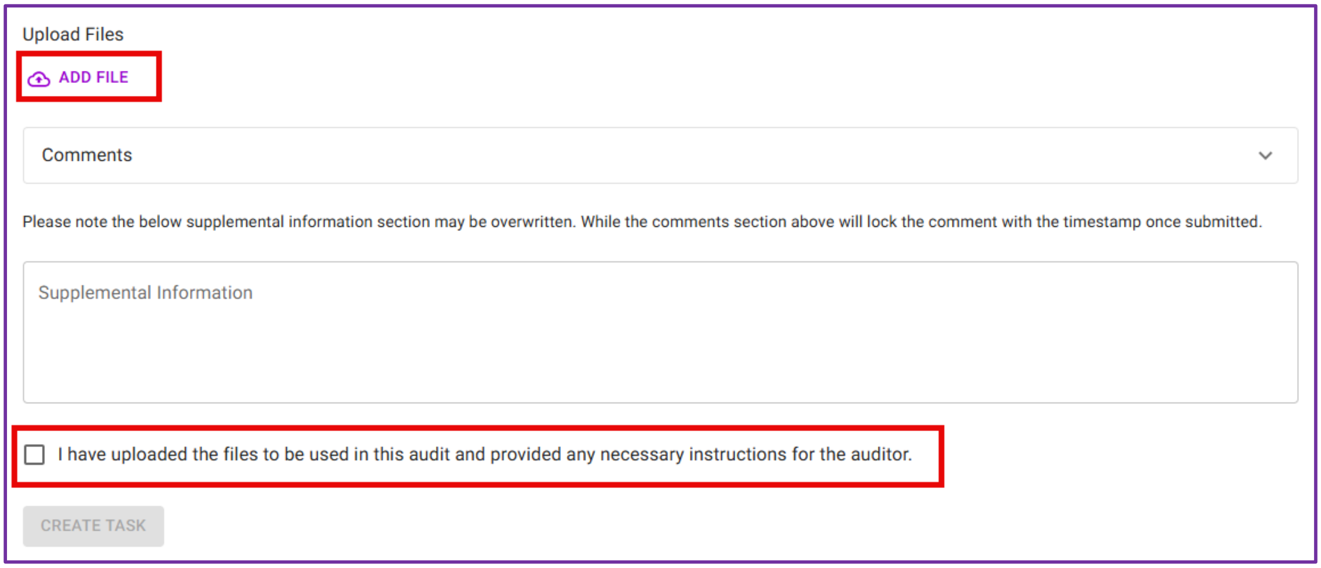
TASK CREATOR: Will default to the user creating task and cannot be changed.

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.

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

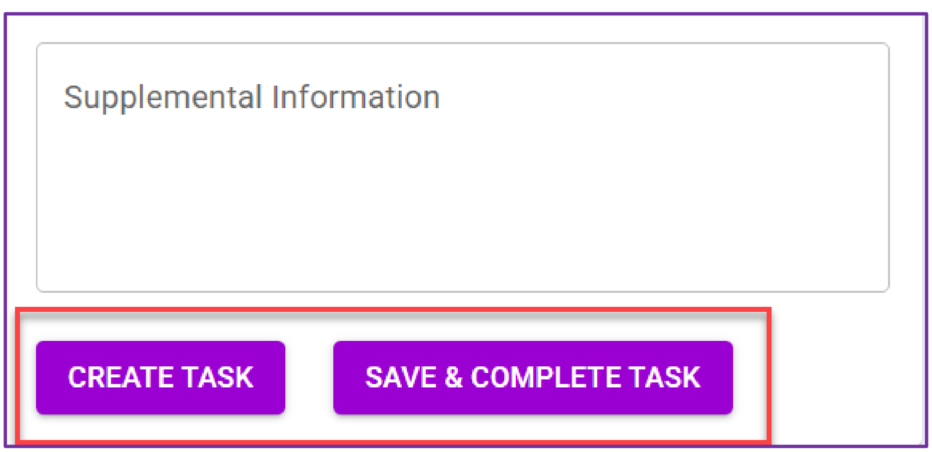
Please note: If the Audit Task is created by an **Organization user**, all supporting files must be uploaded during the task creation process.



Final Steps for all Task Types

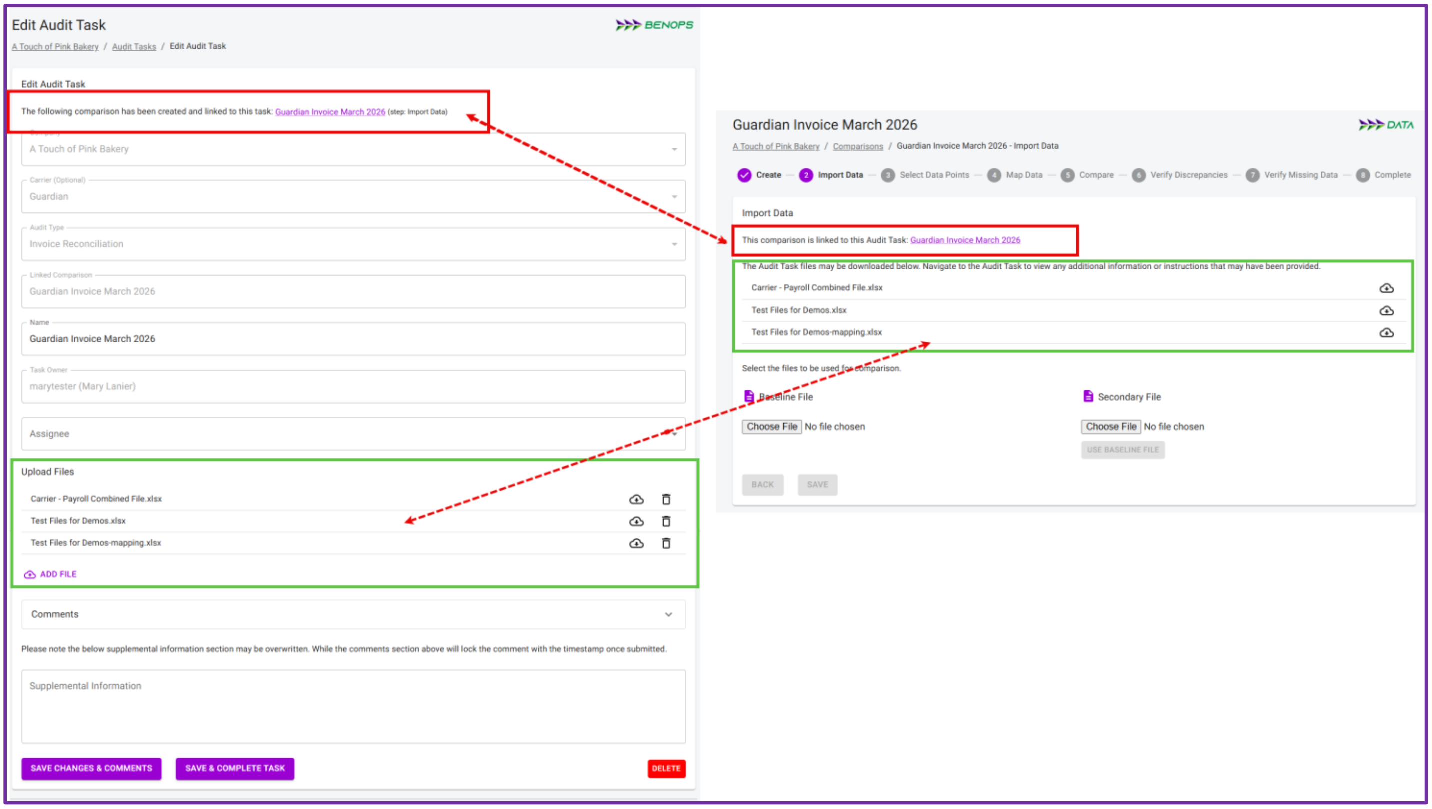
- Add any relevant details in the Comments and/or Supplemental Information sections.
- Click **CREATE TASK** or **SAVE & COMPLETE TASK**.

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.

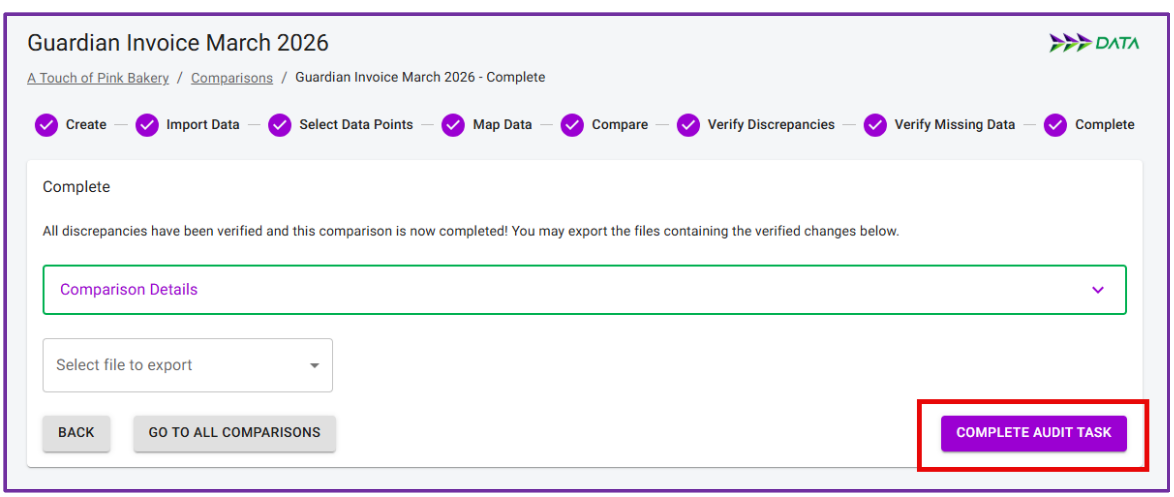


Important Notes:

- 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.

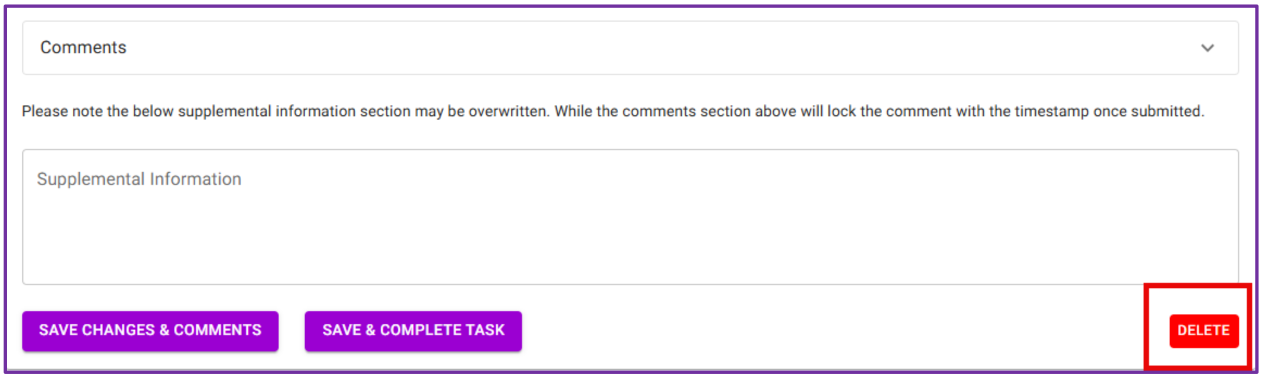


- An Agency user can close the task from the audit once complete by clicking COMPLETE AUDIT TASK.



- A completed task can be reopened if necessary.

- 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>***



Carrier Invoice Conversion

The Streamline application has functionality to convert carrier invoices that are not application-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.

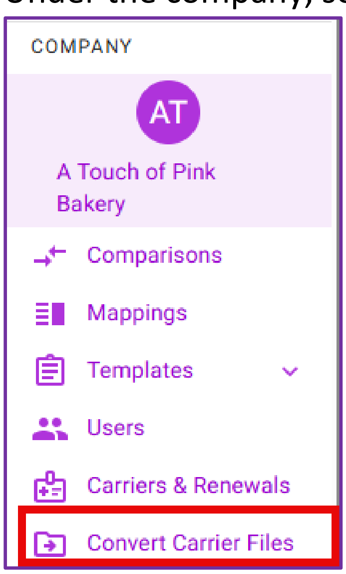
What This Functionality Does:

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.

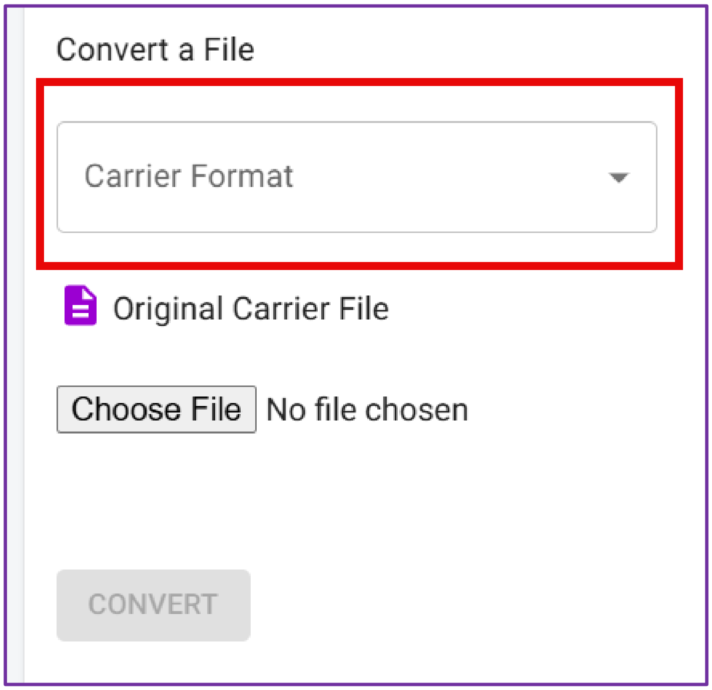
The converted file is then ready for audit use, significantly reducing manual effort and improving efficiency.

To convert a carrier invoice:

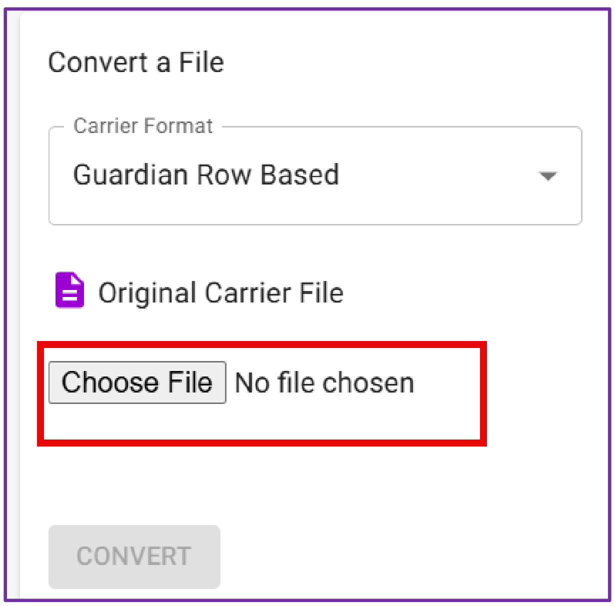
- Navigate to a company if organization user.
- Under the company, select Convert Carrier Files in the left-hand menu.



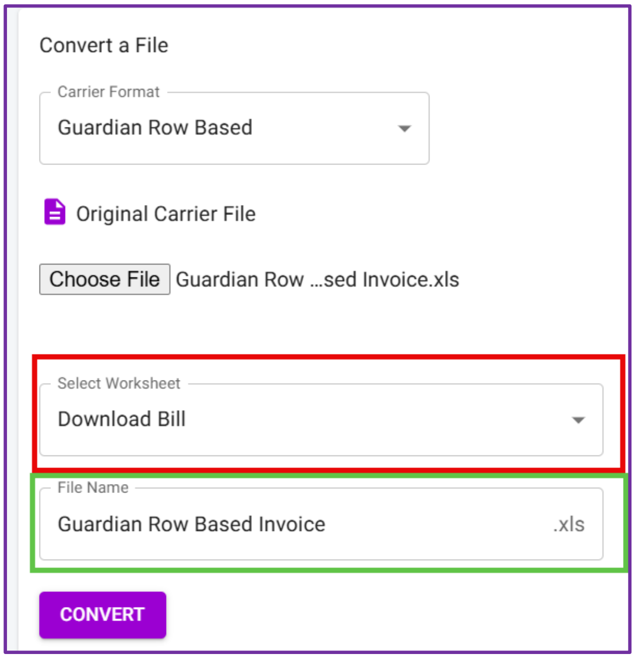
- Select Carrier Format dropdown and then the applicable carrier file.



- Click Choose File and select the carrier invoice



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



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

- The converted file is automatically downloaded to the user's computer and is not saved in the application.

- The file is now ready to be used in a comparison.

Reports

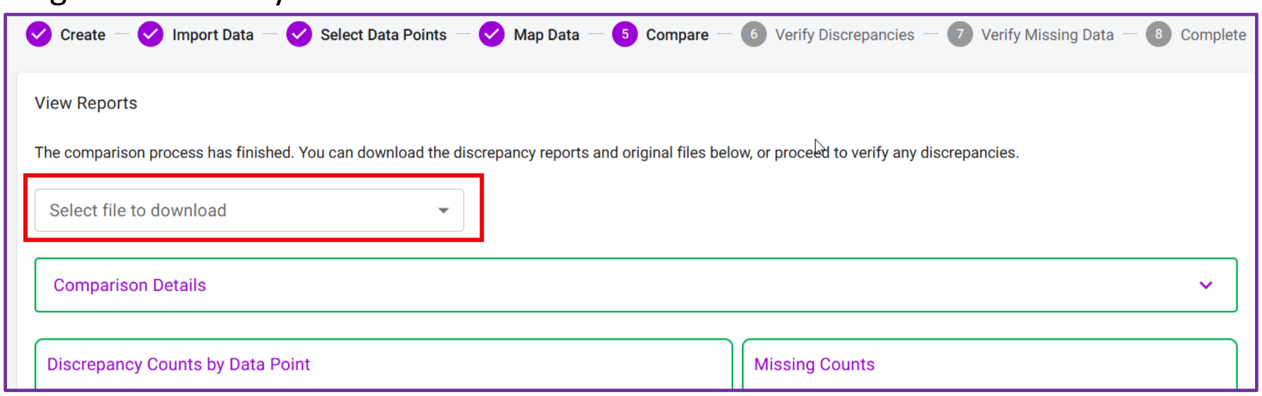
The Streamline application provides several downloadable reports:

Audit Reports

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

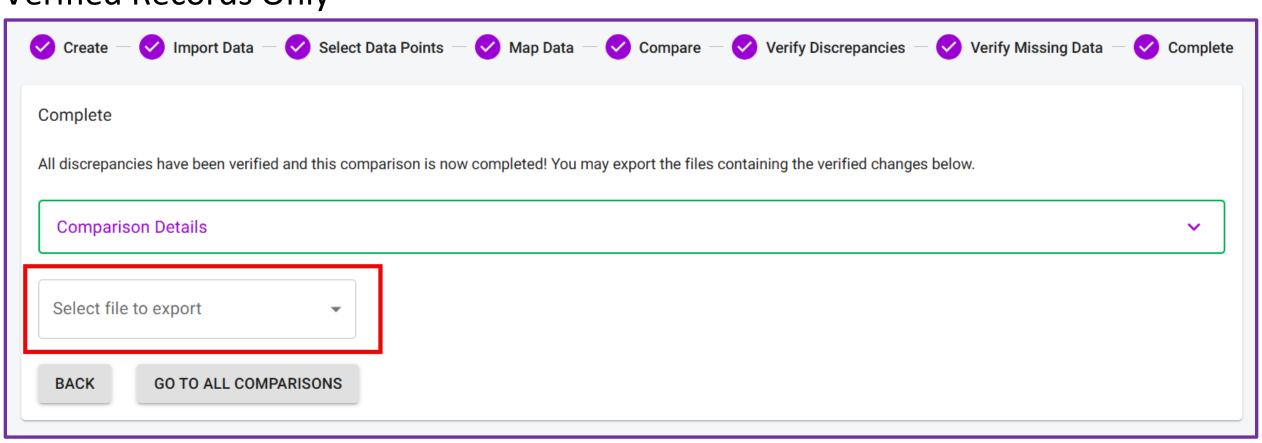
The first set of reports are available on Step 5 Compare:

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



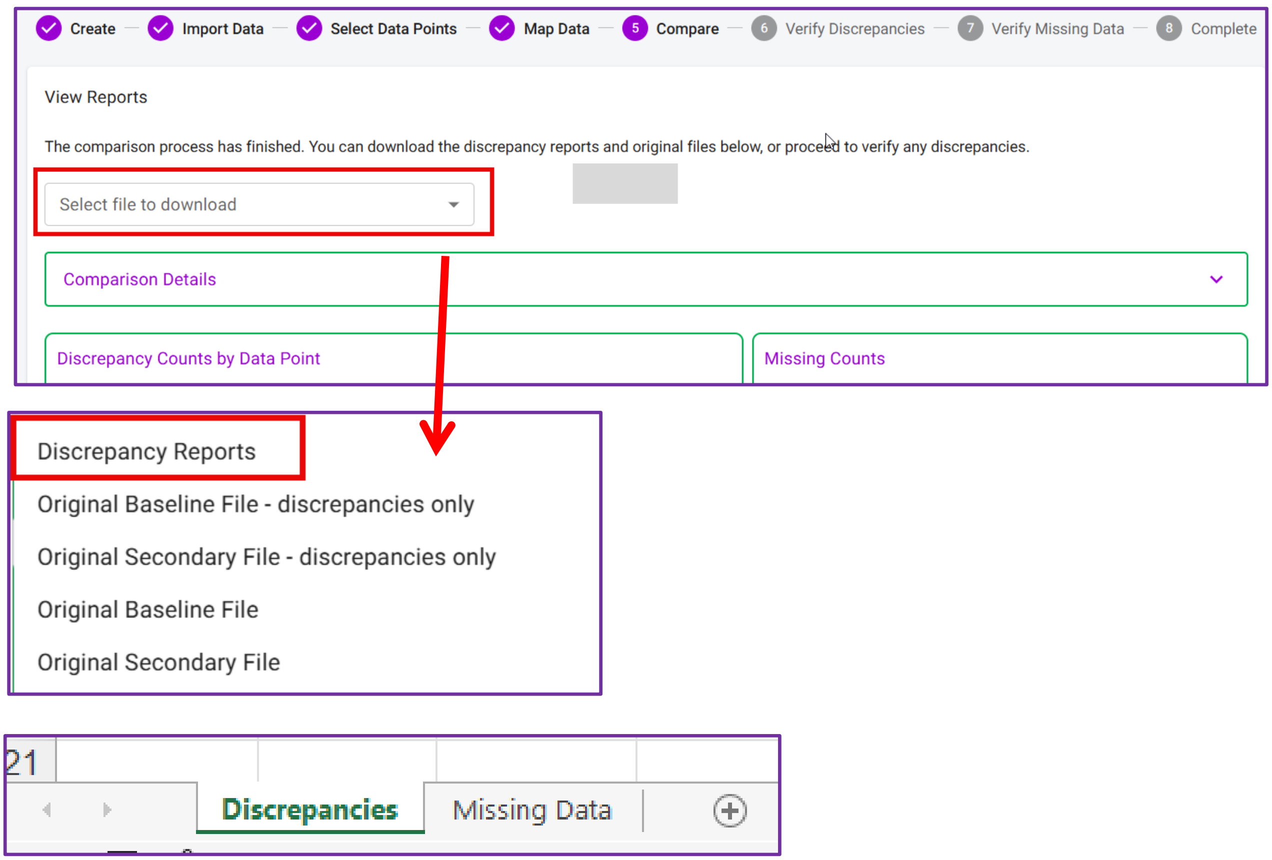
The second set of reports are available on Step 8 Complete

- All Records Including Verified
- Verified Records Only



Discrepancy Report

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



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

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

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

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

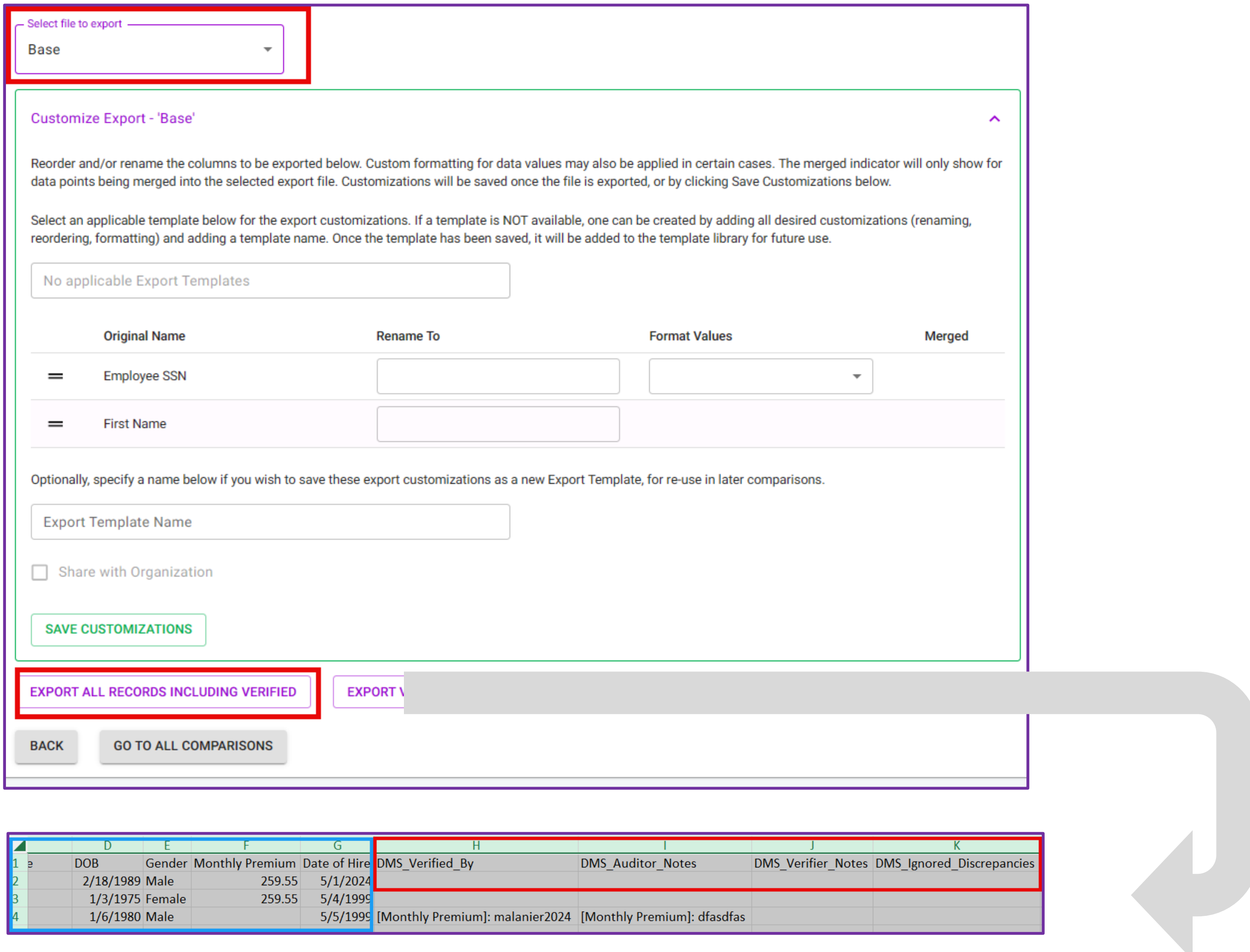
Original Baseline File / Original Secondary File

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

All Records Including Verified

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

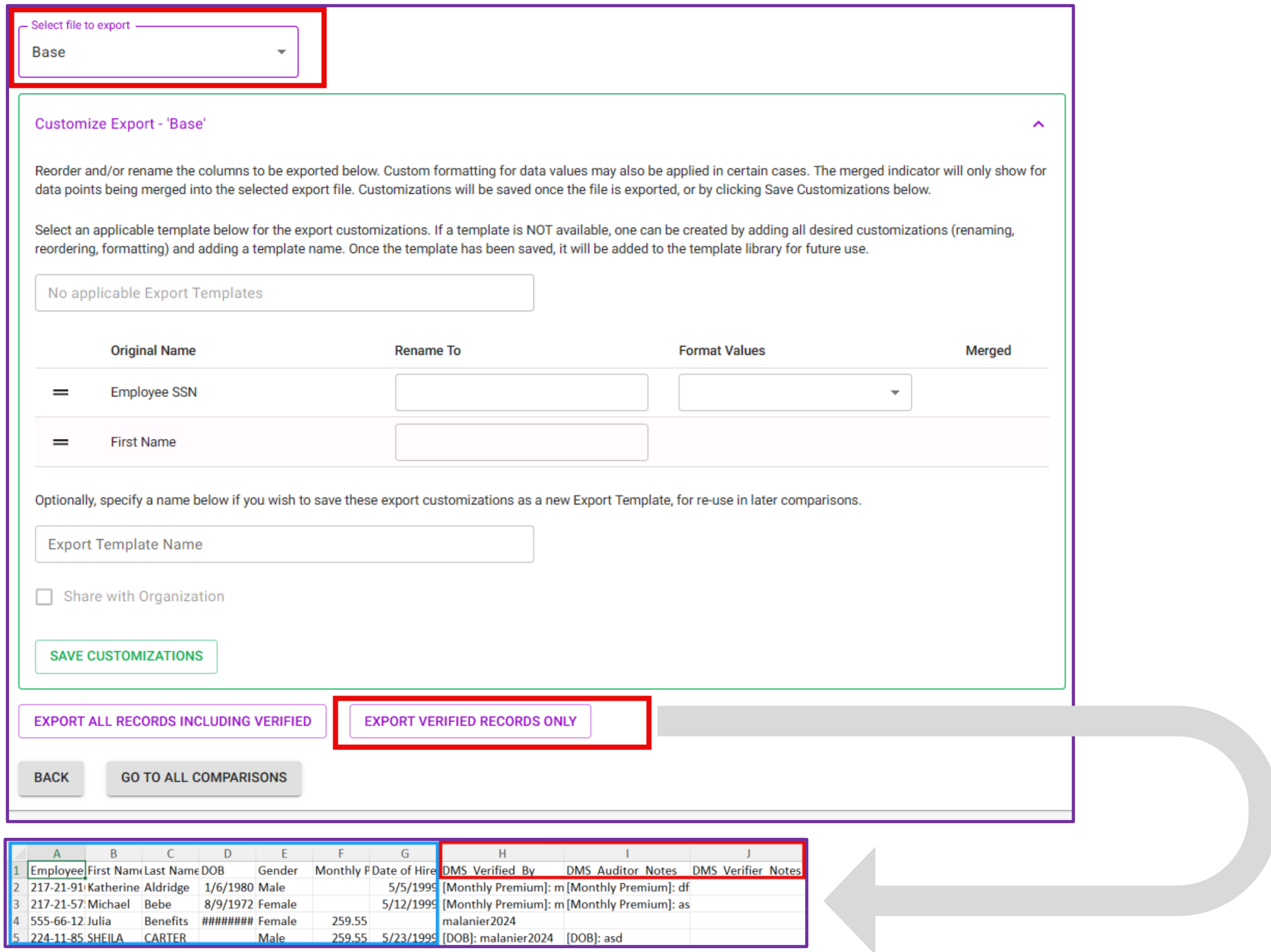
- DMS_Verified_By
- DMS_Auditor_Notes
- DMS_Verifier_Notes
- DMS_Discrepancy_Type
- DMS_Ignored_Discrepancies



<u>Verified Records only</u>

This is a downloadable report located in Step 8 - Complete that contains **<u>only</u>** 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:

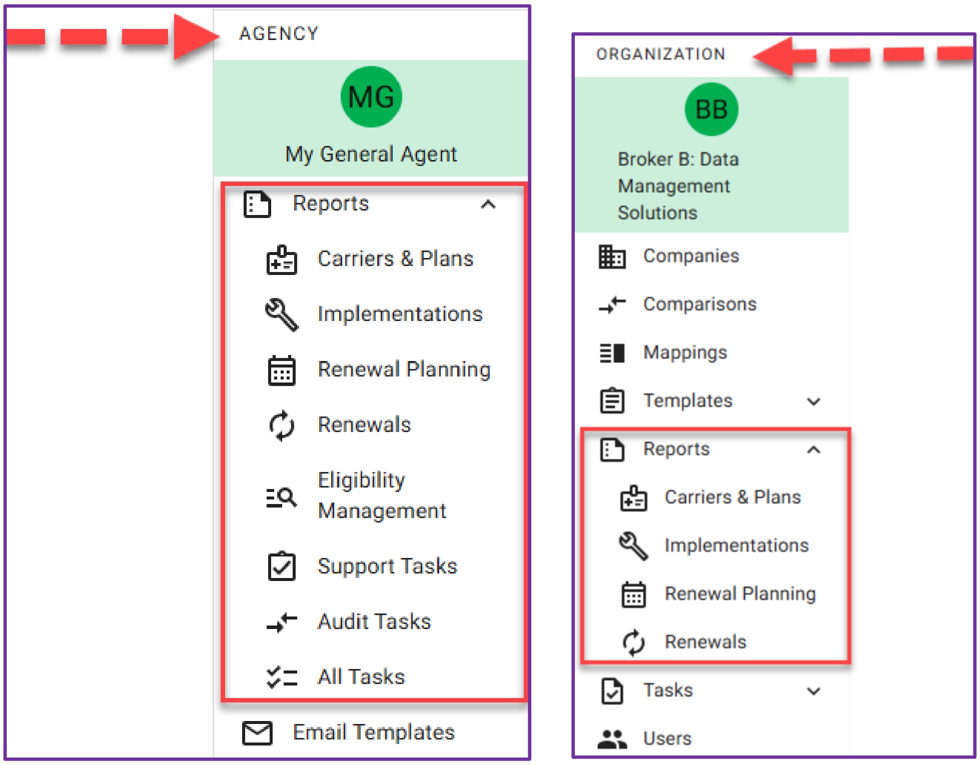
- DMS_Verified_By
- DMS_Auditor_Notes
- DMS_Verifier_Notes
- DMS_Discrepancy_Type



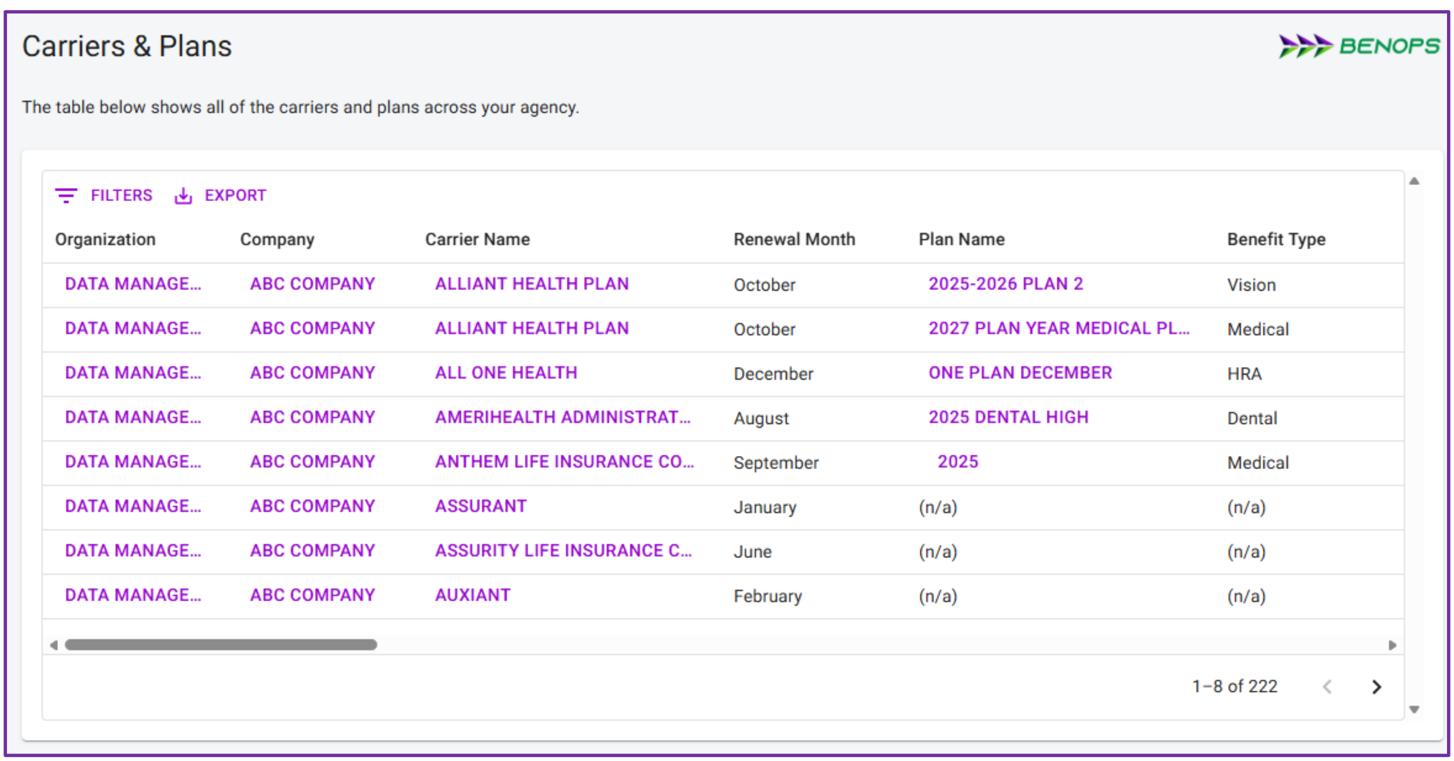
Ignored Records will <u>**not**</u> show in the *Verified Records only* report.

Agency and Organization Reports

There are several reports that live on both the Agency and Organization level: Carriers & Plan, Implementations, Renewal Planning, Renewals, Eligibility Management, Support Tasks, Audit Tasks, and ALL tasks (Agency User only). This new section provides visibility into carriers, plans, implementations, company renewals, and tasks—all in one central location. Reports can be filtered by various columns and exported to CSV or printed, eliminating the need to navigate to each organization and company or renewal individually.



Carriers & Plans: This report provides a list of all carriers and their corresponding plans by organization and company, including key details for each carrier and plan.


Carriers & Plans

BENOPS

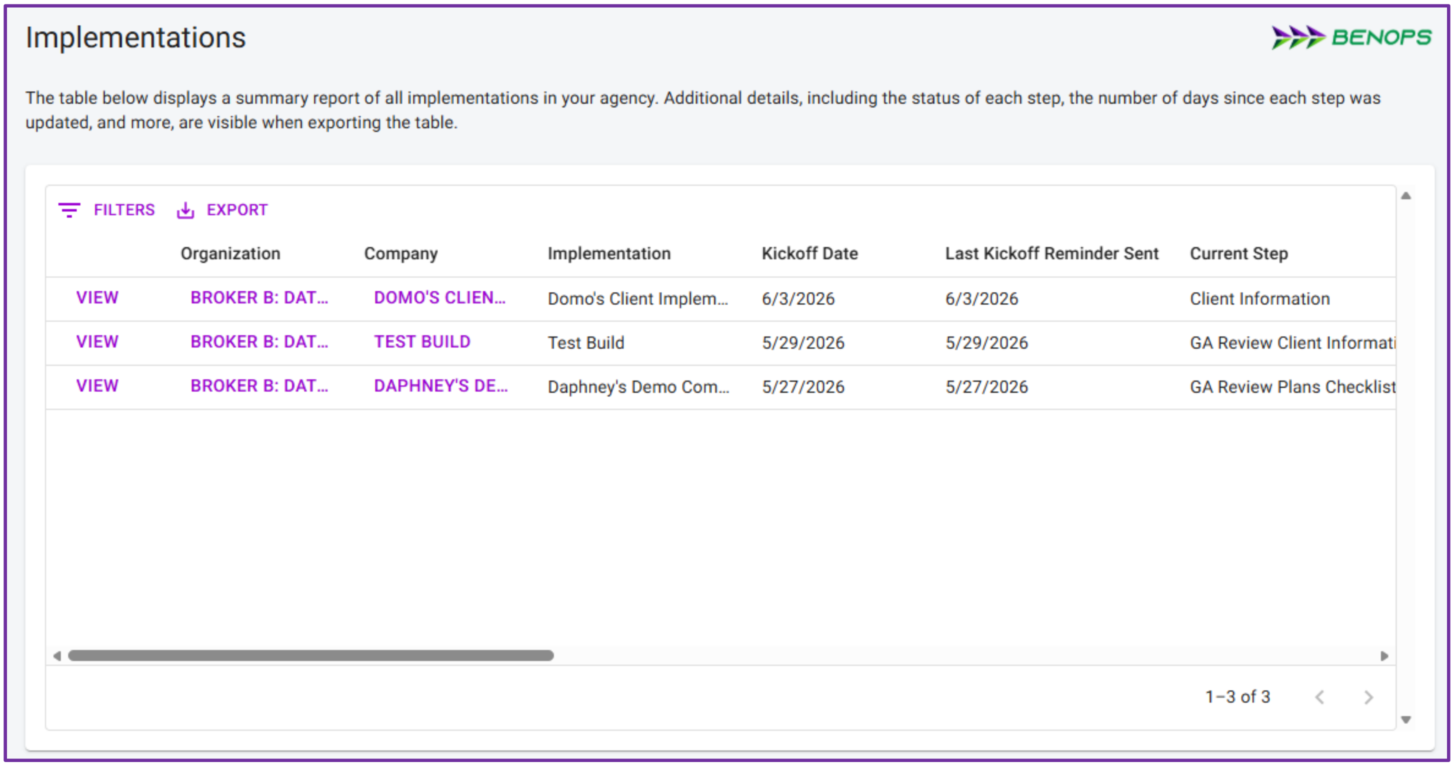
The table below shows all of the carriers and plans across your agency.

FILTERS EXPORT

Organization	Company	Carrier Name	Renewal Month	Plan Name	Benefit Type
DATA MANAGE...	ABC COMPANY	ALLIANT HEALTH PLAN	October	2025-2026 PLAN 2	Vision
DATA MANAGE...	ABC COMPANY	ALLIANT HEALTH PLAN	October	2027 PLAN YEAR MEDICAL PL...	Medical
DATA MANAGE...	ABC COMPANY	ALL ONE HEALTH	December	ONE PLAN DECEMBER	HRA
DATA MANAGE...	ABC COMPANY	AMERIHEALTH ADMINISTRAT...	August	2025 DENTAL HIGH	Dental
DATA MANAGE...	ABC COMPANY	ANTHEM LIFE INSURANCE CO...	September	2025	Medical
DATA MANAGE...	ABC COMPANY	ASSURANT	January	(n/a)	(n/a)
DATA MANAGE...	ABC COMPANY	ASSURITY LIFE INSURANCE C...	June	(n/a)	(n/a)
DATA MANAGE...	ABC COMPANY	AUXIANT	February	(n/a)	(n/a)

1–8 of 222

Implementations: This table displays a summary report of all implementations in your agency. Additional details, including the status of each step, the number of days since each step was updated, and more, are visible when exporting the table.


Implementations

BENOPS

The table below displays a summary report of all implementations in your agency. Additional details, including the status of each step, the number of days since each step was updated, and more, are visible when exporting the table.

FILTERS EXPORT

	Organization	Company	Implementation	Kickoff Date	Last Kickoff Reminder Sent	Current Step
VIEW	BROKER B: DAT...	DOMO'S CLIEN...	Domo's Client Implem...	6/3/2026	6/3/2026	Client Information
VIEW	BROKER B: DAT...	TEST BUILD	Test Build	5/29/2026	5/29/2026	GA Review Client Informati
VIEW	BROKER B: DAT...	DAPHNEY'S DE...	Daphney's Demo Com...	5/27/2026	5/27/2026	GA Review Plans Checklist

1–3 of 3

Renewal Planning: This table displays the month(s) in which each company is scheduled for renewal. Unlike the Renewal Report, this view only reflects when a renewal is expected to occur based on the renewal month specified for the carrier.

Renewal Planning

BENOPS

The table below shows the month(s) that each company in your agency will be undergoing a carrier renewal. Companies that have no carriers in the system are excluded.

FILTERS EXPORT

Organization	Company	Jan	Feb	Mar	Apr	May	Jun	Jul
DATA MANAGEMENT S...	ABC COMPANY	✓	✓		✓		✓	
DATA MANAGEMENT S...	ACME COMPANY	✓				✓		
DATA MANAGEMENT S...	A TOUCH OF PINK BAK...	✓		✓				
DATA MANAGEMENT S...	BIG GROUP	✓						
DATA MANAGEMENT S...	BLACK JACK COMPANY							
DATA MANAGEMENT S...	BROKER BUILDER TES...							
DATA MANAGEMENT S...	COMPANY CREATED A...	✓						
DATA MANAGEMENT S...	DAPHNEY TEST EDITED	✓						

1–8 of 27

Renewal: This report provides a summary of all renewals within your agency or organization, grouped by company, and includes key details for each renewal. Please note that the exported file from this table contains additional key indicators related to each renewal.

Renewals

BENOPS

The table below displays a summary report of all renewals in your agency. Additional details, including the status of each step, the number of days since each step was updated, and more, are visible when exporting the table.

FILTERS EXPORT

	Organization	Company	Renewal Year	Renewal Month	Kickoff Date	Last Kickoff Reminder Sent	Curren
VIEW	DATA MANAGE...	WILLIE WONKA...	2026	October	3/13/2026	3/13/2026	Client I
VIEW	DATA MANAGE...	WILLIE WONKA...	2027	October	3/13/2026	3/13/2026	Client I
VIEW	DATA MANAGE...	TACOS PIZZA J...	2025	January	3/11/2026	3/11/2026	Plans (
VIEW	DATA MANAGE...	TACOS PIZZA J...	2026	January	3/11/2026	3/11/2026	Client I
VIEW	DATA MANAGE...	MARVEL	2026	January	3/11/2026	3/11/2026	Client I
VIEW	DATA MANAGE...	A TOUCH OF PI...	2027	January	2/19/2026	2/19/2026	Client I
VIEW	DATA MANAGE...	ABC COMPANY	2027	January	2/13/2026	2/13/2026	Client I
VIEW	DATA MANAGE...	A TOUCH OF PI...	2026	January	12/9/2025	12/9/2025	Compl

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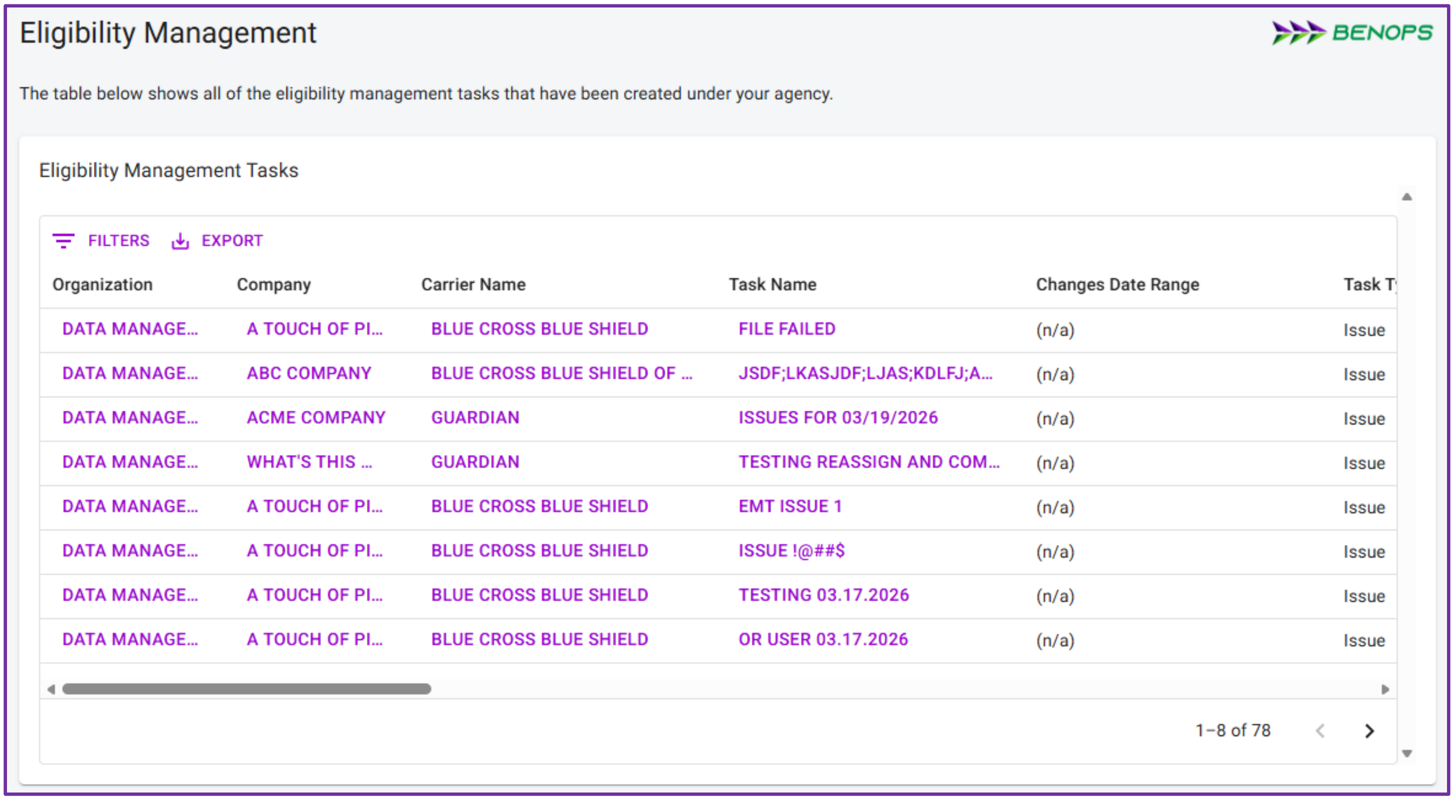
Eligibility Management: This table provides a view of all Eligibility Management tasks created for the organizations and companies available to the user. The report can be easily exported for additional review or sharing.


Eligibility Management

BENOPS

The table below shows all of the eligibility management tasks that have been created under your agency.

Eligibility Management Tasks

FILTERS EXPORT

Organization	Company	Carrier Name	Task Name	Changes Date Range	Task T
DATA MANAGE...	A TOUCH OF PI...	BLUE CROSS BLUE SHIELD	FILE FAILED	(n/a)	Issue
DATA MANAGE...	ABC COMPANY	BLUE CROSS BLUE SHIELD OF ...	JSDF;LKASJDF;LJAS;KDLFJ;A...	(n/a)	Issue
DATA MANAGE...	ACME COMPANY	GUARDIAN	ISSUES FOR 03/19/2026	(n/a)	Issue
DATA MANAGE...	WHAT'S THIS ...	GUARDIAN	TESTING REASSIGN AND COM...	(n/a)	Issue
DATA MANAGE...	A TOUCH OF PI...	BLUE CROSS BLUE SHIELD	EMT ISSUE 1	(n/a)	Issue
DATA MANAGE...	A TOUCH OF PI...	BLUE CROSS BLUE SHIELD	ISSUE !@##$	(n/a)	Issue
DATA MANAGE...	A TOUCH OF PI...	BLUE CROSS BLUE SHIELD	TESTING 03.17.2026	(n/a)	Issue
DATA MANAGE...	A TOUCH OF PI...	BLUE CROSS BLUE SHIELD	OR USER 03.17.2026	(n/a)	Issue

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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

BENOPS

The table below shows all of the support tasks that have been created under your agency.

Support Tasks

FILTERS EXPORT

Organization	Company	Carrier Name	Plan Name	Task Name	Task Type
DATA MANAGE...	A TOUCH OF PI...	(n/a)	(n/a)	NEW TASK ADDED	Plan Build
DATA MANAGE...	A TOUCH OF PI...	BLUE CROSS BLUE SHIELD	(n/a)	INCORRECT MAPPING FOR FU...	Plan Build
DATA MANAGE...	A TOUCH OF PI...	BLUE CROSS BLUE SHIELD	Blue Options Plan 1	INCORRECT MAPPING FOR FU...	Plan Build
DATA MANAGE...	A TOUCH OF PI...	(n/a)	(n/a)	SUPPORT TASK -REPORETING	Reporting
DATA MANAGE...	A TOUCH OF PI...	(n/a)	(n/a)	PLAN BUILD SUPPORT TASK	Plan Build
DATA MANAGE...	A TOUCH OF PI...	(n/a)	(n/a)	JFALKJDFL;KAJSDFKL;AJSD;K...	Broker Support
DATA MANAGE...	A TOUCH OF PI...	(n/a)	(n/a)	CREATE A NEW REPORT FOR ...	Reporting
DATA MANAGE...	A TOUCH OF PI...	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

The table below shows all of the audit tasks that have been created under your agency.

Audit Tasks

FILTERS EXPORT

Organization	Company	Carrier Name	Task Name	Comparison	Compa
BROKER B: DAT...	ABC COMPANY	(n/a)	TEST AUDIT TASK	TEST AUDIT TASK	Import
BROKER B: DAT...	FLY EAGLES FL...	ACCESS HEALTH	THIS IS A TEST AUDIT TASK.	THIS IS A TEST AUDIT TASK.	Import
BROKER B: DAT...	FLY EAGLES FL...	AETNA	PREPARE BENEFITS TAKEOVE...	PREPARE BENEFITS TAKEOVE...	Import
BROKER B: DAT...	A TOUCH OF PI...	(n/a)	CREATING TASK TO TEST FOR...	CREATING TASK TO TEST FOR...	Import
BROKER B: DAT...	A TOUCH OF PI...	ADMIN AMERICA	ADMIN AMERICA JUNE 2026	ADMIN AMERICA JUNE 2026	View R
BROKER B: DAT...	FLY EAGLES FL...	(n/a)	DEMO AUDIT TASK	DEMO AUDIT TASK	Compl
BROKER B: DAT...	A TOUCH OF PI...	BLUE CROSS BLUE SHIELD	BCBS: 2026 Q2 CK AUDIT	BCBS: 2026 Q2 CK AUDIT	Import
BROKER B: DAT...	FLY EAGLES FL...	BLUE CROSS BLUE SHIELD OF ...	THIS IS A GENERAL AUDIT TA...	THIS IS A GENERAL AUDIT TA...	Verify I

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ALL Tasks: This table provides a view of all tasks including renewals and implementations created for the organizations and companies available to the user. The report can be easily exported for additional review or sharing. This table is only available to AGENCY USERS.

All Tasks

The table below shows all of the eligibility, support, audit, renewal, and implementation tasks that have been created under your agency.

All Tasks

FILTERS EXPORT

Organization	Company	Carrier Name	Task Name	Task Category	Task Type
BROKER B: DAT...	RON'S BARN	(n/a)	2026 JULY RENEWAL	Renewal	Renewal
BROKER B: DAT...	DOLLYWOOD A...	(n/a)	2026 JANUARY RENEWAL	Renewal	Renewal
BROKER B: DAT...	DOMO'S CLIEN...	(n/a)	DOMO'S CLIENT IMPLEMENTA...	Implementation	Implementation
BROKER B: DAT...	THE MARBLE F...	(n/a)	2027 JANUARY RENEWAL	Renewal	Renewal
BROKER B: DAT...	JOES FISH MA...	(n/a)	2027 NOVEMBER RENEWAL	Renewal	Renewal
BROKER B: DAT...	ABC COMPANY	(n/a)	TEST AUDIT TASK	Audit	Audit
BROKER B: DAT...	TEST BUILD	(n/a)	TEST BUILD	Implementation	Implementation
BROKER B: DAT...	FLY EAGLES FL...	AETNA	05.15.2026 TEST	Eligibility	Issue

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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

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	03/21/2023	Updated instructions for Template Enhancements	Mary Lanier
2.1	07/24/2023	Updated instructions for Additional User Types, Inactivate Users. Added "memberid" to SSN keyword, Added Sample registration email	Mary Lanier
2.2	11/29/2023	Updated email address from datatool@brokerbuildersolutions.com to support@dms-datavalidate.com	Mary Lanier
2.3	03/26/2024	Updated logo and added additional instructions for moving templates to the organization level. Updated website references for new website.	Mary Lanier
2.4	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
2.5	07/09/2024	Updated to include carrier tracking enhancement	Mary Lanier
2.6	10/15/2024	Added verbiage to include discrepancy type dropdown, additional field to the carrier tracking information, and termination company date	Mary Lanier
2.7	12/05/2024	Updated with new enhancements including additional discrepancy reports and customized emails	Mary Lanier
2.8	02/18/2025	Updated to include the Carrier Invoice Conversion functionality	Mary Lanier
2.9	05/20/2025	Updated to include Plan Information and additional fields	Mary Lanier
3.0	06/12/2025	Updated import functionality for carrier, carrier plans, and company	Mary Lanier
4.0	10/23/2025	Updated images	Mary Lanier
5.0	12/05/2025	Updated Eligibility Management Tracking	Mary Lanier

6.0	01/05/2026	Rebrand, Mapping, Rounding Variance, Additional task type to EMT	Mary Lanier
7.0	03/30/2026	Audit and Support tasks – Release Notes 03-24-2026 and 02/18/2026	Mary Lanier
8.0	06/17/2026	Release notes for 05/22/2026	Mary Lanier