

# Agency User Guide



Powered by

**DATA MANAGEMENT SOLUTIONS**

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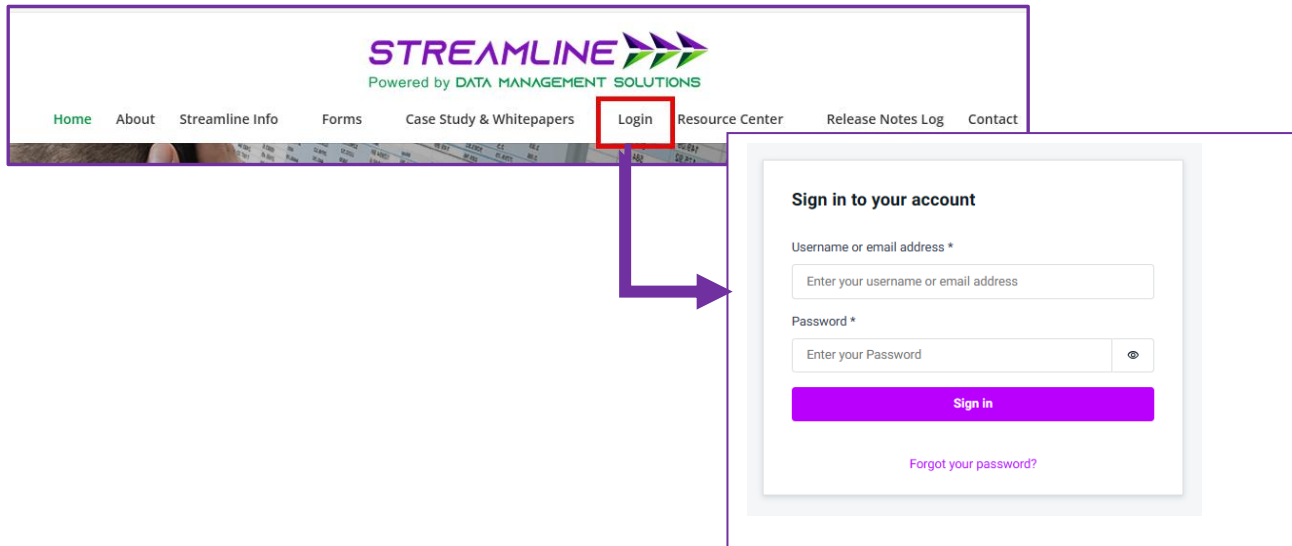
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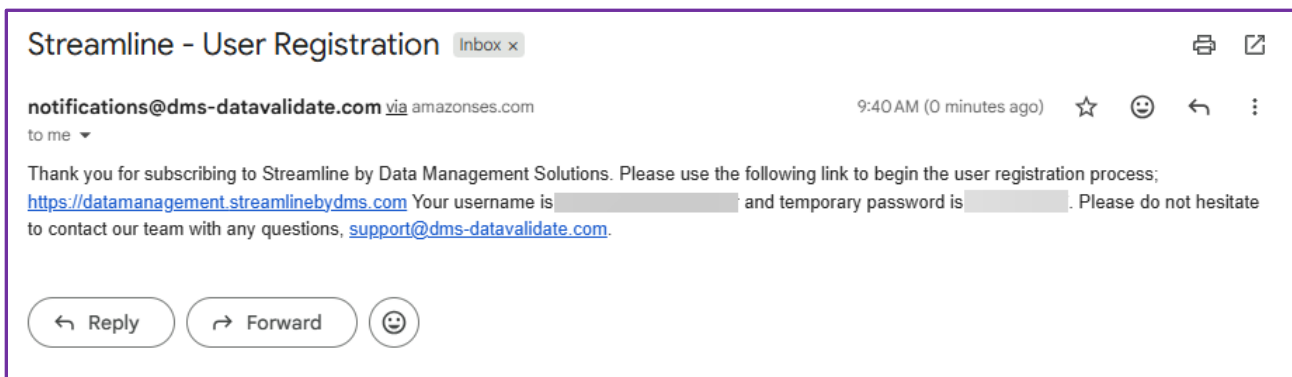


## Login

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



### Registration Email Example:



## 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.

The screenshot shows the 'Data Management Solutions' dashboard. On the left, there is a navigation menu with the following items: Companies, Comparisons, Mappings, Templates, Reports, and Users. The 'Users' item is highlighted with a red box. The main content area displays a welcome message 'Welcome, malanier2024!' and an 'Information' section with the following data:

Organization Name	Users Count
Data Management Solutions	8
Total Companies Count	Active Companies Count
27	18
Inactive Companies Count	Active
9	Yes
Plan	Admin & Comparer Seats
Platinum Elite	10

Select ADD A NEW ORGANIZATION USER.

The screenshot shows the 'Users' page in the Data Management Solutions dashboard. The page title is 'Users' and the breadcrumb is 'Data Management Solutions / Users'. Below the title, there is a message: 'The table below shows all of your organization's users currently in the system.' To the right of this message, there is a button labeled 'ADD A NEW ORGANIZATION USER' which is highlighted with a red box. Below the message, there is a table with the following columns: Username, First Name, Last Name, and Role. The table is currently empty.

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.**

### Add New Organization User

[Data Management Solutions](#) / [Users](#) / Add New Organization User

Complete the form below to add a new Organization User to the system.

#### New User

#### Billing Contact

 Billing Contact

#### Access Level

#### Organization

Data Management Solutions

#### Role

 ORGANIZATION\_ADMIN

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.

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

## Adding an Organization Comparer user

Select USERS under the desired organization.

ORGANIZATION

DM

Data Management Solutions

- Companies
- Comparisons
- Mappings
- Templates
- Reports
- Users**

COMPANY

Select a Company

## Data Management Solutions

Welcome, malanier2024!

### Information

[VIEW](#)

Organization Name	Users Count
Data Management Solutions	8
Total Companies Count	Active Companies Count
27	18
Inactive Companies Count	Active
9	Yes
Plan	Admin & Comparer Seats
Platinum Elite	10

Notes

Select ADD A NEW ORGANIZATION USER.

ORGANIZATION

DM

Data Management Solutions

- Companies
- Comparisons
- Mappings
- Templates
- Reports
- Users**

## Users

Data Management Solutions / Users

The table below shows all of your organization's users currently in the system.

[ADD A NEW ORGANIZATION USER](#)

**FILTERS**

Username	First Name	Last Name	Role
----------	------------	-----------	------

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.

**New User**

Email Address

Username

First Name

Last Name

Phone

Job Title

**Billing Contact**

Billing Contact

Access Level

Organization Compare Access ▾

Organization  
Data Management Solutions

Role

ORGANIZATION\_COMPARER

[SAVE](#)

**Whitelisted Companies**  
Select the companies that this user should have access to.

A Touch of Pink Bakery, ABC Company, ... ▾

[SELECT ALL](#)   [REMOVE ALL](#)

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.

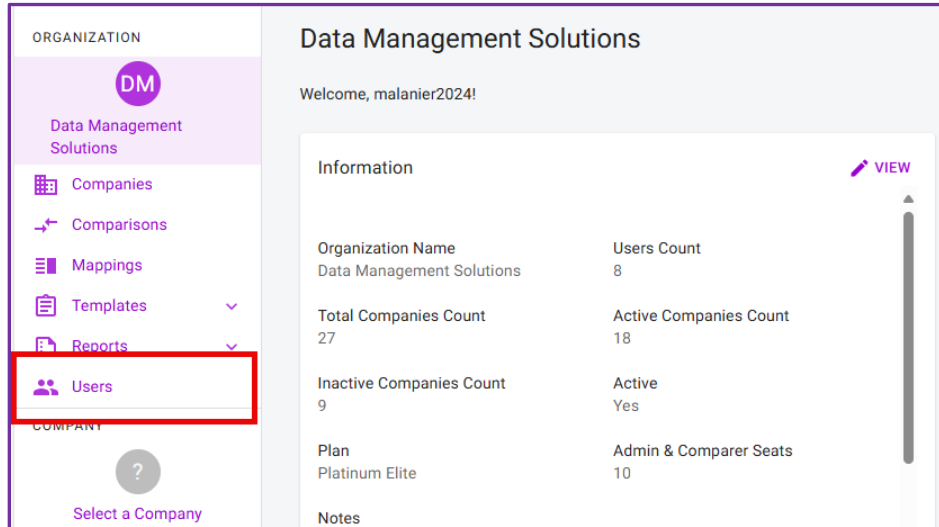
- ABC Testing
- Daphney Testing Company
- Dreamworks
- Hiram's Company
- Import Company
- Marvel Company

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

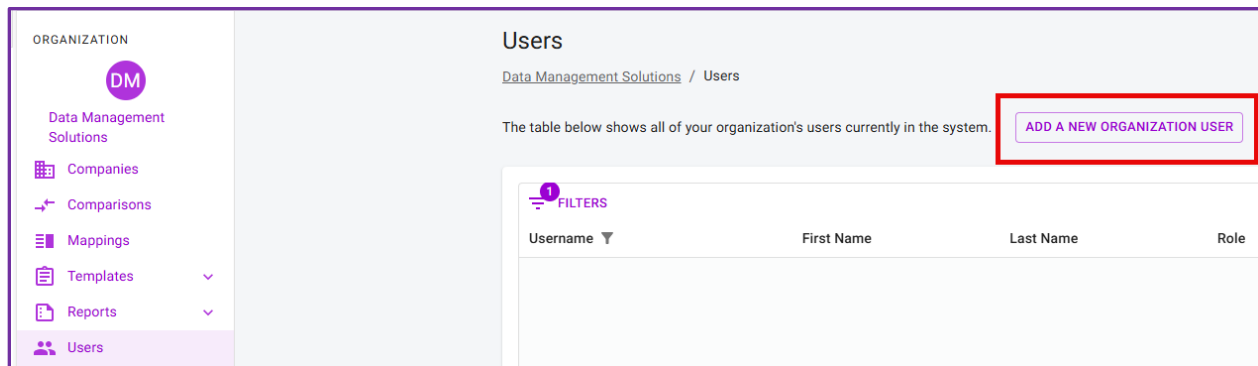
Select USERS under the desired organization.



The screenshot shows the 'Data Management Solutions' organization page. The left sidebar contains a navigation menu with items: Companies, Comparisons, Mappings, Templates, Reports, and Users. The 'Users' item is highlighted with a red box. The main content area displays organization information for 'Data Management Solutions'.

Organization Name	Users Count
Data Management Solutions	8
Total Companies Count	Active Companies Count
27	18
Inactive Companies Count	Active
9	Yes
Plan	Admin & Comparer Seats
Platinum Elite	10

Select ADD A NEW ORGANIZATION USER.



The screenshot shows the 'Users' page for the 'Data Management Solutions' organization. The left sidebar is the same as in the previous screenshot, but 'Users' is now selected. The main content area has a heading 'Users' and a breadcrumb 'Data Management Solutions / Users'. Below the heading is a text prompt: 'The table below shows all of your organization's users currently in the system.' To the right of this text is a button labeled 'ADD A NEW ORGANIZATION USER', which is highlighted with a red box. Below the text is a table with a 'FILTERS' icon and a table header.

Username	First Name	Last Name	Role
----------	------------	-----------	------

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.

## Add New Organization User

[Data Management Solutions](#) / [Users](#) / Add New Organization User

Complete the form below to add a new Organization User to the system.

**New User**

Email Address

Username

First Name

Last Name

Phone

Job Title

Billing Contact

Billing Contact

Access Level

Organization Task Manager

Whitelisted Companies

Select the companies that this user should have access to.

A Touch of Pink Bakery, ABC Company, ...

[SELECT ALL](#) [REMOVE ALL](#)

Organization

Data Management Solutions

Role

ORGANIZATION\_TASK\_MANAGER

[SAVE](#)

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.

- ABC Testing
- Daphney Testing Company
- Dreamworks
- Hiram's Company
- Import Company
- Marvel 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.

ORGANIZATION

DM  
Data Management Solutions

- Companies
- Comparisons
- Mappings
- Templates
- Reports
- Users**

COMPANY  
Select a Company

### Data Management Solutions

Welcome, malanier2024!

Information [VIEW](#)

Organization Name Data Management Solutions	Users Count 8
Total Companies Count 27	Active Companies Count 18
Inactive Companies Count 9	Active Yes
Plan Platinum Elite	Admin & Comparer Seats 10

Notes

Select ADD A NEW ORGANIZATION USER.

ORGANIZATION

DM  
Data Management Solutions

- Companies
- Comparisons
- Mappings
- Templates
- Reports
- Users

### Users

Data Management Solutions / Users

The table below shows all of your organization's users currently in the system. [ADD A NEW ORGANIZATION USER](#)

**1** FILTERS

Username	First Name	Last Name	Role

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

## Add New Organization User

Data Management Solutions / Users / Add New Organization User

Complete the form below to add a new Organization User to the system.

**New User**

Email Address

Username

First Name

Last Name

Phone

Job Title

**Billing Contact**

Billing Contact

Access Level

Organization Verifier Access Only ▾

Organization

Data Management Solutions

Role

ORGANIZATION\_USER

**SAVE**

**Whitelisted Companies**

Select the companies that this user should have access to.

A Touch of Pink Bakery, ABC Company, ... ▾

SELECT ALL REMOVE ALL

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.

- ABC Testing
- Daphney Testing Company
- Dreamworks
- HiraK's Company
- Import Company
- Marvel 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.

Data Management Solutions

Welcome, malanier2024!

Information	VIEW	Companies	NEW
Organization Name Data Management Solutions	Users Count 8	ABC Company	A Touch of Pink Bakery

Click USERS under the desired company.

COMPANY

AT

A Touch of Pink Bakery

- Comparisons
- Mappings
- Templates
- Users**
- Carriers & Renewals
- Convert Carrier Files

Click ADD A NEW COMPANY USER.

Users

A Touch of Pink Bakery / Users

The table below shows all of your company's users currently in the system.

**ADD A NEW COMPANY USER**

Enter all applicable information for the newly created user.

New User

Billing Contact

Billing Contact

Access Level

Company Admin ▾

Company

A Touch of Pink Bakery

Role

COMPANY\_ADMIN

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.

**Data Management Solutions**

Welcome, malanier2024!

**Information** [VIEW](#)

Organization Name	Users Count
Data Management Solutions	8

**Companies** [NEW](#)

ABC Company
<b>A Touch of Pink Bakery</b>

Click **USERS** under the desired company.

COMPANY

**AT**

A Touch of Pink Bakery

- Comparisons
- Mappings
- Templates
- Users**
- Carriers & Renewals
- Convert Carrier Files

Click **ADD A NEW COMPANY USER**.

**Users**

A Touch of Pink Bakery / Users

The table below shows all of your company's users currently in the system.

**ADD A NEW COMPANY USER**

Enter all applicable information for the newly created user.

New User

Billing Contact

Billing Contact

Access Level

Company Verifier Access Only ▾

Company

A Touch of Pink Bakery

Role

COMPANY\_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.

### dummyuser

Broker B: Data Management Solutions / Users / dummyuser

#### User Information

[EDIT](#)

Username	dummyuser	Email	dummyuser@testemail.net
First Name	Dummy	Last Name	User
Billing Contact	No	Role	Organization Admin
Organization	Broker B: Data Management Solutions	User ID	d72753df-754e-45f0-ac69-6fd0348d6ea2
Enabled	Yes	User Status	FORCE_CHANGE_PASSWORD
Created At	1/5/2026	Updated At	1/5/2026

This user is currently **enabled**.

[DISABLE](#)

This user has still not logged in with their temporary password. Click the button below to resend the invitation email.

[RESEND INVITATION](#)

## Inactivating / Reactivating a User

Select USERS under the organization.

### ORGANIZATION

DM  
Data Management Solutions

- Companies
- Comparisons
- Mappings
- Templates
- Reports
- Users**

COMPANY  
Select a Company

## Data Management Solutions

Welcome, malanier2024!

#### Information

[VIEW](#)

Organization Name	Data Management Solutions	Users Count	8
Total Companies Count	27	Active Companies Count	18
Inactive Companies Count	9	Active	Yes
Plan	Platinum Elite	Admin & Comparer Seats	10

Notes

Select User to inactivate.

### Users

Data Management Solutions / Users

The table below shows all of your organization's users currently in the system. [ADD A NEW ORGANIZATION USER](#)

FILTERS

Username ↓	First Name	Last Name	Role	Enabled
MALANIER2024	Mary	Lanier	Organization Admin	Yes
DUMMY5	Five	Dummy	Organization Admin	Yes

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

#### User Information

[EDIT](#)

Username: demobroker1      Email: datamanagementsolutionsdvp@gmail.com

This user is currently **enabled**.

[DISABLE](#)

To reverse the inactivation, click ENABLE.

#### User Information

[EDIT](#)

Username: demobroker1      Email: datamanagementsolutionsdvp@gmail.com

This user is currently **disabled**.

[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

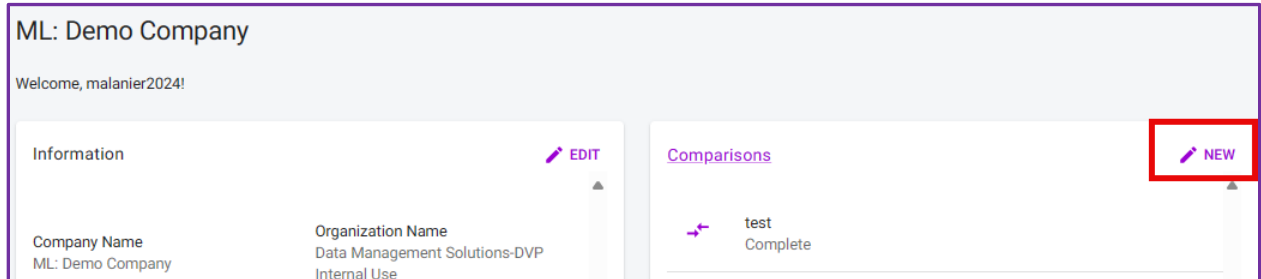
Select a Company or click NEW to create a new company.

The screenshot shows the 'Data Management Solutions-DVP Internal Use' interface. On the left, there is an 'Information' panel with an 'EDIT' button. The main area displays a 'Companies' list with two entries: 'DS: Demo Company' (ID: DD) and 'ML: Demo Company' (ID: MD). A green box highlights the 'Companies' header and the two entries, with a green arrow pointing down to the list. A red box highlights the 'NEW' button, with a red arrow pointing to it from the right.

Organization Name	Users Count
Data Management Solutions-DVP Internal Use	2
Total Companies Count	2
Active Companies Count	2
Inactive Companies Count	0
Active	Yes
Plan	Admin & Comparer Seats
DVP Base 3-6	3

## Create New Compare

Select NEW to begin a new comparison



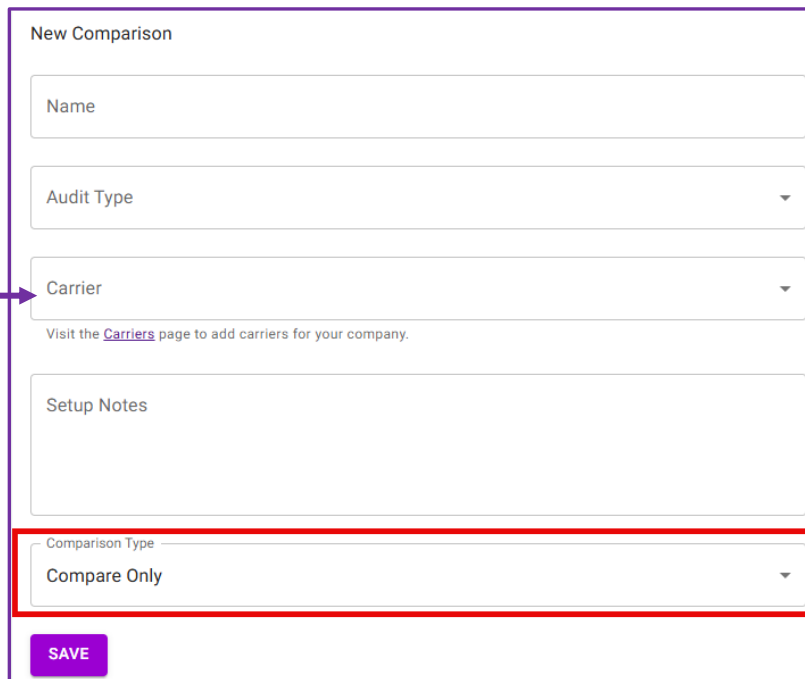
ML: Demo Company  
Welcome, malanier2024!

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

## Name the Compare

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

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



New Comparison

Name

Audit Type

Carrier

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

Setup Notes

Comparison Type

Compare Only

SAVE

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

## Import Files

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

The screenshot shows the 'Import Data' interface with two columns for file selection. The left column is for the 'Baseline File' and the right for the 'Secondary File'. Both columns have a 'Choose File' button, a 'Test Files for ...03.07.2024.xlsx' list, a 'Select Worksheet' dropdown, and a 'Baseline File Name' or 'Secondary File Name' input field. The 'USE BASELINE FILE' button is highlighted in the secondary file section. A 'SAVE' button is at the bottom.

## 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.

The screenshot shows the 'Select Data Points & Create Import Template' interface. It includes a dropdown for 'Apply a Data Points Template', a warning about AI accuracy, and an 'AI AUTO-MATCH DATA POINTS' button. Below, there are two dropdown menus for data points: 'Member First Name' and 'First Name'. A 'Unique Identifier' checkbox is present, and an 'AI' icon is highlighted in a red box.

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

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

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

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

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

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

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

Select Data Points

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

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

Apply a Data Points Template

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

AI AUTO-MATCH COMPLETE

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

+ ADD DATA POINT

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

Data Points Template Name  
Data Points Template

Share with Organization

BACK SAVE

CLEAR ALL

## Select Data Points & Reuse Existing Template

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

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

Apply a Data Points Template  
User Guide Data Points Template

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

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.

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

Apply a Data Points Template

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

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

[AI AUTO-MATCH DATA POINTS](#)

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

[CLEAR ALL](#)

[+ ADD DATA POINT](#)

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

Data Points Template Name

Share with Organization

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

## Mapping

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

Mappings can be created several ways.

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

To Manually create a mapping:

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

Click SAVE MAPPINGS to newly created mapping to save.

Gender - Sex

Select Mappings or **NEW MAPPINGS**

Data Mappings name  
Gender - Sex

**IMPORT**

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

Source Value	Target Value
Source: F	Target: Female
Source: M	Target: Male

+ ADD MAPPING

**SAVE MAPPINGS**

If you use existing mapping, click SELECT MAPPINGS.

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

Gender - Sex

Select Mappings Gender or **NEW MAPPINGS**

**COPY MAPPINGS**

Source Value	Target Value
Source: Female	Target: F
Source: Male	Target: M

**SELECT MAPPINGS**

VIEW IN MAPPINGS LIBRARY

Gender Sex **GENDER** none

## To Import a mapping:

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

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

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

Gender - Sex

Select Mappings or NEW MAPPINGS

Data Mappings name  
Gender Import\_01.05.2026

IMPORT

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

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

+ ADD MAPPING

SAVE MAPPINGS

## To Copy and modify an existing mapping:

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

Medical Plan - Medical

Select Mappings  
2025 BCBS Plans

COPY MAPPINGS

Source Value	Target Value
Source: Plan 1	Target: HSA
Source: Plan 2	Target: PPO

SELECT MAPPINGS

VIEW IN MAPPINGS LIBRARY

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

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

Medical Plan - Medical ✕

Select Mappings  
2025 BCBS Plans or NEW MAPPINGS

Data Mappings name  
2025 BCBS Plans (Copy)

IMPORT

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

Source Value	Target Value
Source Plan 1	Target HSA <span style="float: right;">✕</span>
Source Plan 2	Target PPO <span style="float: right;">✕</span>
Source Plan 3	Target Limited <span style="float: right;">✕</span>

+ ADD MAPPING

SAVE MAPPINGS



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

Data Mappings name  
Deduction Code

Source Value	Target Value
Source STD	Target STD 14 day
Source STD	Target STD 30 day

Data Mappings name  
Deduction Code

Source Value	Target Value
Source STD 14 day	Target STD <span style="float: right;">✕</span>
Source STD 30 day	Target STD <span style="float: right;">✕</span>

## 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.

Data Points				
'Base'	'Secondary'	Data Mappings	Date Format	Computation Function
DOB	DOB	<input type="button" value="MAP"/>	<input type="button" value="none"/>	DOB - DOB <span style="float: right;">X</span>
Employment Status	Employment Status	<input type="button" value="EMPLOYMENT STATUS"/>	<input type="button" value="NONE"/>	

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

Format

## Mapping – Computation

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

Computation Function

X

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

Format

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

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

Monthly Cost
Monthly Plan Cost
MAP
none

Monthly Cost - Monthly Plan Cost

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

Format: MINUS: BASELINE - SECONDARY

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

Rounding Range: 0.03

**SAVE COMPUTATION FUNCTION**

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

Comparison Details

**Discrepancy Counts by Data Point**

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

**Missing Counts**

No missing records found!

**Discrepancy Report**

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



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

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

## Compare

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

**Compare**

Please review the details of this comparison below.

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

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

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

View Reports

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

Select file to download

Comparison Details

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

Missing from 'base'	Missing from 'second'
0	1

Discrepancy Report

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

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

Missing Report

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

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



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

The **Request Support** option provides quick and easy access to assistance when an audit produces a high volume of results. It allows users to flag the audit for additional review and support, helping teams stay focused and ensuring issues are addressed efficiently.

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

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

## View Reports

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

Select file to download

### Comparison Details

#### Discrepancy Counts by Data Point

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

#### Missing Counts

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

### Need Help?

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

REQUEST SUPPORT

## Verify Discrepancies

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

Verify Discrepancies

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

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

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

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

Verifier Details

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

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

Verify Discrepancies

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

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

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

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

Verifier Details

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

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

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.

The screenshot shows a comparison interface for two entities: Allen and Central. The data points being compared are '25 / Employment Status' and '24 / Employment Status'. On the right side, there are three main sections: 'Discrepancy Type' with a dropdown menu set to 'Other', 'Auditor notes' with a text area containing 'Employment Status does not match|', and 'Verifier notes' which is currently empty. Below these sections is a button labeled 'APPLY TO ALL ON THIS DATA POINT'. In the center, there are radio buttons for 'Active', 'Terminated', and 'Ignore', along with an 'Overwrite' button.

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

The screenshot shows the 'Verify Missing' interface. At the top right, it indicates 'Rows per page: 5' and '1-2 of 2'. Below this is a 'Verifier Memo' dropdown menu. To the left of the dropdown are three buttons: 'BACK', 'NEXT', and 'OVERRIDE AS COMPLETE'. Below the dropdown is a large text area for entering the 'Verifier Memo'. A red dashed arrow points from the dropdown to the text area. At the bottom of the text area, there is a small note: 'General purpose notes available to the assigned verifier, that (if a verifier is assigned) will be communicated back to the auditor via automated email.'

## Verify Missing

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

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

Verify Discrepancies

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

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

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

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

Verifier Details ▼

First name	Last name	Relationship	Unique Identifier	'base' row	'second' row	Duplicate unique identifier row	Verified Inclusion	Last Verified By	Discrepancy Type / Notes
Julia	Benefits		julia_benefits_1234	13			<input type="radio"/> Include <input type="radio"/> Exclude	-	<div style="border: 1px solid red; padding: 5px; margin-bottom: 5px;">                     Discrepancy Type                      ▼                 </div> <div style="border: 1px solid red; padding: 5px; margin-bottom: 5px;">                     Auditor notes  <div style="border: 1px solid gray; height: 20px; width: 100%;"></div> </div> <div style="border: 1px solid red; padding: 5px;">                     Verifier notes  <div style="border: 1px solid gray; height: 20px; width: 100%;"></div> </div>

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

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

Verifier Memo ▼

BACK
NEXT
OVERRIDE AS COMPLETE

Verifier Memo ▲

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

## Assign a Verifier to the Compare

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

**Verify Discrepancies**

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

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

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

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

Verifier Details ▼

**Verifier Details**

Assigned Verifier Unassigned <span style="float: right; color: purple;">✎ EDIT</span>	Auditor Memo <span style="float: right; color: purple;">✎ EDIT</span>
Setup Notes	Carrier
Audit Type	Created By / Auditor maryl
Comparison Type Compare + Merge	

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

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

Hello {Verifier First Name},

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

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

{Auditor Memo}

Thank you,

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

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

### Edit Comparison

Comparison Name  
Demo for User Guides

Audit Type

Carrier

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

Setup Notes

Comparison Type  
Compare Only

Created By / Auditor  
maryl

Auditor Memo

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

Assigned Verifier

Verifier Memo

General purpose notes available to the email.

SAVE

Unassigned

companyverifier-dms

demobroker1

malanier2024

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

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

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

### Edit Comparison

Comparison Name  
Demo - Compare and Merge

Audit Type

Carrier

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

Setup Notes

Resend the notification email to the assigned verifier.

RESEND

## Complete the Compare

Data verification is complete.

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

Hello {Auditor First Name},

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

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

{Verifier Memo}

Thank you,

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

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

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

Complete

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

Comparison Details

Select file to export

BACK GO TO ALL COMPARISONS

-- Select --

Base

Secondary

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

Select file to export: Base

Customize Export - 'Base'

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

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

No applicable Export Templates

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

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

Export Template Name:

Share with Organization

**SAVE CUSTOMIZATIONS**

EXPORT ALL RECORDS INCLUDING VERIFIED    EXPORT VERIFIED RECORDS ONLY

BACK    GO TO ALL COMPARISONS

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

Middle Name

DOB

Last Name

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

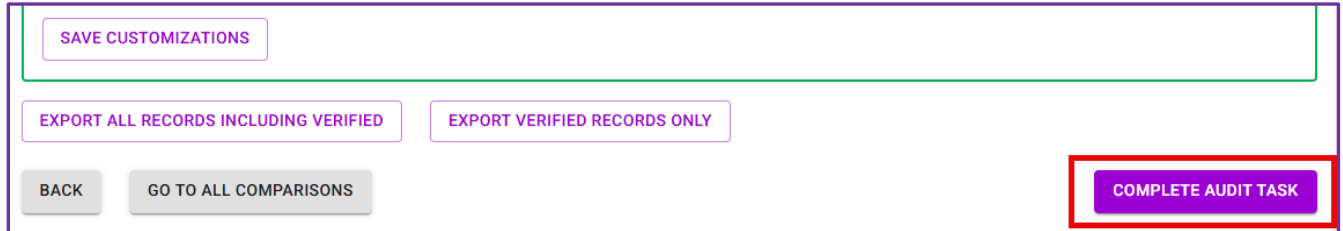
**SAVE CUSTOMIZATIONS**

EXPORT ALL RECORDS INCLUDING VERIFIED    EXPORT VERIFIED RECORDS ONLY

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

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

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



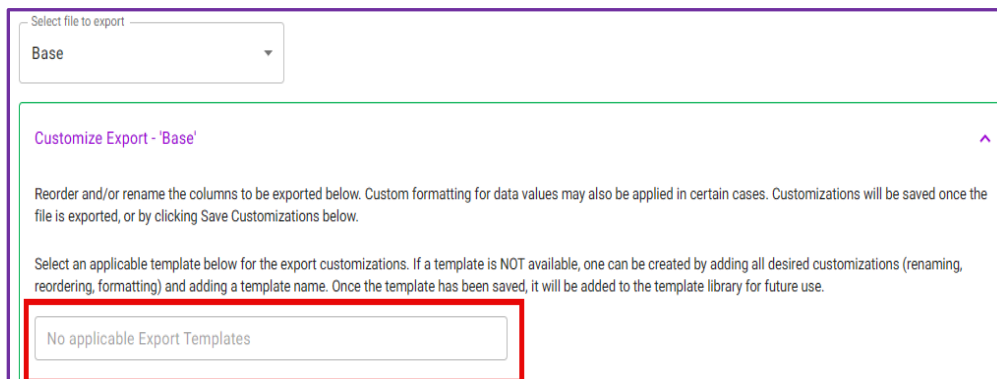
The screenshot shows a control panel with several buttons. At the top left is a purple button labeled 'SAVE CUSTOMIZATIONS'. Below it are two purple buttons: 'EXPORT ALL RECORDS INCLUDING VERIFIED' and 'EXPORT VERIFIED RECORDS ONLY'. At the bottom left are two grey buttons: 'BACK' and 'GO TO ALL COMPARISONS'.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

## Export Template

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

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

Selecting export template:



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

## Saving New Export Template:

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

Export Template Name

Export Template

Share with Organization

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

Questions: Contact [Support@dms-datavalidate.com](mailto: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.

The screenshot shows a dashboard for 'Data Management Solutions-DVP Internal Use'. On the left is an 'Information' panel with fields like 'Organization Name', 'Users Count', 'Total Companies Count', 'Active Companies Count', 'Inactive Companies Count', 'Active', 'Plan', and 'Admin & Comparer Seats'. On the right is a 'Companies' list with two entries: 'DD DS: Demo Company' and 'MD ML: Demo Company'. A green box highlights these entries, with a green arrow pointing down to the header. A red arrow points to a 'NEW' button in the top right corner.

### Create New Compare

Select NEW to begin a new comparison

The screenshot shows a dashboard for 'ML: Demo Company'. On the left is an 'Information' panel with fields like 'Company Name', 'Organization Name', and 'Internal Use'. On the right is a 'Comparisons' list with one entry: 'test Complete'. A red box highlights a 'NEW' button in the top right corner.

### Name the Compare

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

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

**New Comparison**

Name  
Demo - Compare and Merge

Audit Type

Carrier

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

Setup Notes

Comparison Type  
Compare & Merge

SAVE

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

## Import Files

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

**Import Data**

Select the files to be used for comparison.

**Baseline File**

Choose File Test Files for ...03.07.2024.xlsx

Select Worksheet  
baseline

Baseline File Name  
Base .xlsx

**Secondary File**

Choose File Test Files for ...03.07.2024.xlsx

USE BASELINE FILE

Select Worksheet  
secondary

Secondary File Name  
Secondary .xlsx

BACK SAVE

## Select Data Points & Create Import Template

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

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

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

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

Apply a Data Points Template

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

**AI AUTO-MATCH DATA POINTS**

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

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

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

Data Point Date of Hire  Unique Identifier X

+ ADD DATA POINT

[merge] Employee SSN Social Security Number First Name

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

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

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

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

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

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

## Select Data Points

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

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

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

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

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

Apply a Data Points Template

User Guide Data Points Template

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

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

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

base.xlsx  
base ssn

second.xlsx  
second ssn

SSN

SSN

Unique Identifier

Gender

Sex

Unique Identifier

Member First Name

First Name

Unique Identifier

Member Last Name

Last Name

Unique Identifier

Birthdate

DOB

Unique Identifier

Medical Plan

Health Coverage

Unique Identifier

Middle Name

[merge]

Unique Identifier

[merge]

Employment Status

Unique Identifier

[+ ADD DATA POINT](#)

[CLEAR ALL](#)

X

X

X

X

X

X

X

X

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

Data Points Template Name

Share with Organization

BACK

SAVE

## Select Data Points & Reuse Existing Template

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

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

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

Apply a Data Points Template  
User Guide Data Points Template

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



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

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

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

Select Data Points

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

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

Apply a Data Points Template  
Demo Import Template

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

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

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

[+ ADD DATA POINT](#)

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

Data Points Template Name  
Demo Import Template with No DOB

Share with Organization

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

## Mapping

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

Mappings can be created several ways.

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

## To Manually create a mapping:

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

Click SAVE MAPPINGS to newly created mapping to save.

Gender - Sex

Select Mappings or **NEW MAPPINGS**

Data Mappings name  
Gender - Sex

**IMPORT**

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

Source Value	Target Value
Source: F	Target: Female
Source: M	Target: Male

**+ ADD MAPPING**

**SAVE MAPPINGS**

If you use existing mapping, click SELECT MAPPINGS.

Gender	Sex	<b>MAP</b>	none
Member First Name	First Name	<b>MAP</b>	
Member Last Name	Last Name	<b>MAP</b>	
Medical Plan	Medical	<b>MAP</b>	none
Monthly Cost	Monthly Plan Cost	<b>MAP</b>	none

Gender - Sex

Select Mappings Gender or **NEW MAPPINGS**

**COPY MAPPINGS**

Source Value	Target Value
Source: Female	Target: F
Source: Male	Target: M

**SELECT MAPPINGS**

**VIEW IN MAPPINGS LIBRARY**

Gender Sex **GENDER** none

## To Import a mapping:

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

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

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

Gender - Sex

Select Mappings or NEW MAPPINGS

Data Mappings name  
Gender Import\_01.05.2026

IMPORT

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

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

+ ADD MAPPING

SAVE MAPPINGS

## To Copy and modify an existing mapping:

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

Medical Plan - Medical

Select Mappings  
2025 BCBS Plans

COPY MAPPINGS

Source Value	Target Value
Source: Plan 1	Target: HSA
Source: Plan 2	Target: PPO

SELECT MAPPINGS

VIEW IN MAPPINGS LIBRARY

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

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

Medical Plan - Medical ✕

Select Mappings  
2025 BCBS Plans or NEW MAPPINGS

Data Mappings name  
2025 BCBS Plans (Copy)

IMPORT

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

Source Value	Target Value
Source Plan 1	Target HSA <span style="float: right;">✕</span>
Source Plan 2	Target PPO <span style="float: right;">✕</span>
Source Plan 3	Target Limited <span style="float: right;">✕</span>

+ ADD MAPPING

SAVE MAPPINGS



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

Data Mappings name  
Deduction Code

Source Value	Target Value
Source STD	Target STD 14 day
Source STD	Target STD 30 day

Data Mappings name  
Deduction Code

Source Value	Target Value
Source STD 14 day	Target STD <span style="float: right;">✕</span>
Source STD 30 day	Target STD <span style="float: right;">✕</span>

## 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.

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

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

Format:

## Mapping – Computation

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

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

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

Format:

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

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

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

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

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

Discrepancy Report								
First name	Last name	Relationship	Unique Identifier	'Base' row / data point	'Secondary' row / data point	'Base' value	'Secondary' value	Computation Function Result
Katherine	Aldridge		217219160_katherine_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

Please review the details of this comparison below.

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

BACK
COMPARE

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

View Reports

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

Select file to download

Comparison Details

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

Missing from 'base'	Missing from 'second'
0	1

Discrepancy Report

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

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Missing Report

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

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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](mailto:support@dms-datavalidate.com).

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

## View Reports

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

Select file to download

### Comparison Details

#### Discrepancy Counts by Data Point

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

#### Missing Counts

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

### Need Help?

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

REQUEST SUPPORT

## Verify Discrepancies

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

**Verify Discrepancies**

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

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

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

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

**Verifier Details** ▼

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

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

Verify Discrepancies

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

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

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

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

Verifier Details ▼

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

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.

Allen	Central	25 / Employment Status	24 / Employment Status	<input type="radio"/> Active <input type="radio"/> Terminated <input type="radio"/> Overwrite <input type="radio"/> Ignore	Discrepancy Type Other	Auditor notes Employment Status does not match.	Verifier notes [Empty]	<input type="button" value="APPLY TO ALL ON THIS DATA POINT"/>
-------	---------	------------------------------	------------------------------	---	---------------------------	--	---------------------------	--

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.**

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Verifier Memo

Verifier Memo

Verifier Memo

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

## Verify Missing

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

Verify Discrepancies

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

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

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

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

Verifier Details ▼

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

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

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Verifier Memo ▼

BACK NEXT OVERRIDE AS COMPLETE

Verifier Memo ▲

Verifier Memo

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

## Assign a Verifier to the Compare

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

**Verify Discrepancies**

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

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

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

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

Verifier Details ▼

**Verifier Details**

Assigned Verifier Unassigned <span style="float: right; color: purple; font-size: small;">✎ EDIT</span>	Auditor Memo <span style="float: right; color: purple; font-size: small;">✎ EDIT</span>
Setup Notes	Carrier
Audit Type	Created By / Auditor maryl
Comparison Type Compare + Merge	

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

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

Hello {Verifier First Name},

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

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

{Auditor Memo}

Thank you,

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

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

### Edit Comparison

Comparison Name  
Demo for User Guides

Audit Type

Carrier

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

Setup Notes

Comparison Type  
Compare Only

Created By / Auditor  
maryl

Auditor Memo

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

Assigned Verifier

Verifier Memo

General purpose notes available to the email.

SAVE

Unassigned

companyverifier-dms

demobroker1

malanier2024

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

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

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

### Edit Comparison

Comparison Name  
Demo - Compare and Merge

Audit Type

Carrier

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

Setup Notes

Resend the notification email to the assigned verifier.

RESEND

## Complete the Compare

Data verification is complete.

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

Hello {Auditor First Name},

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

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

{Verifier Memo}

Thank you,

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

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

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

Complete

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

Comparison Details

Select file to export

BACK GO TO ALL COMPARISONS

-- Select --

Base

Secondary

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

Select file to export

Base

Customize Export - 'Base'

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

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

No applicable Export Templates

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

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

Export Template Name

Share with Organization

[SAVE CUSTOMIZATIONS](#)

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

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

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

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

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

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

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

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

A screenshot of the same software interface as above. The 'COMPLETE AUDIT TASK' button at the bottom right is now highlighted with a red rectangular border.

## Export Template

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

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

Selecting export template:

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

## Saving New Export Template:

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

Export Template Name

Share with Organization

[SAVE CUSTOMIZATIONS](#)

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

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

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

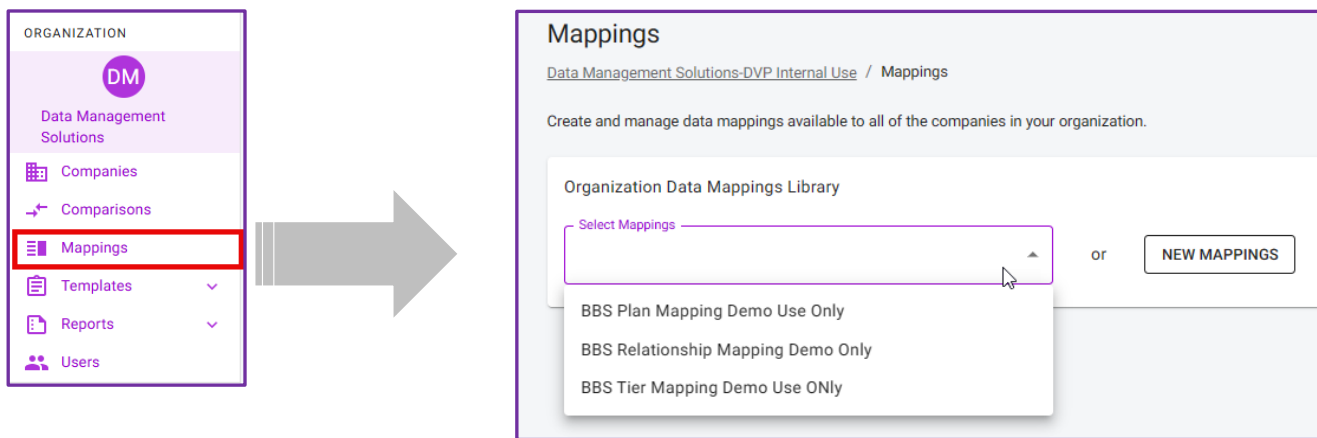
Questions: Contact [Support@dms-datavalidate.com](mailto:Support@dms-datavalidate.com)

## Create Organization Level Mapping

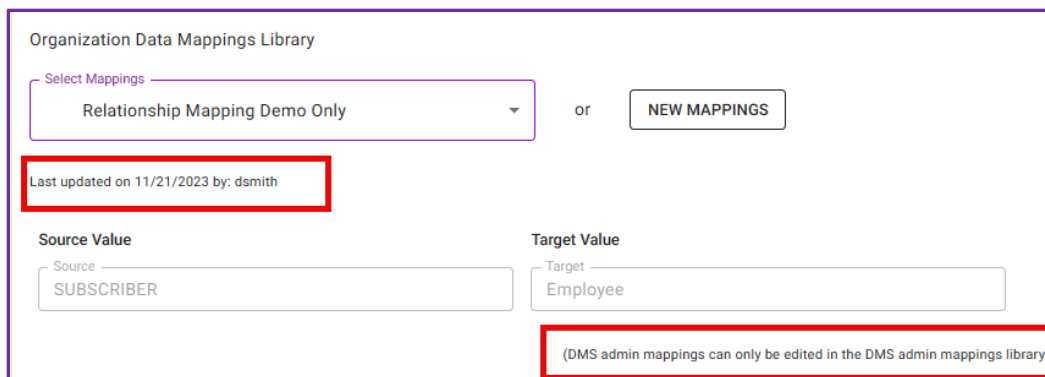
The Streamline application offers Organization Level mapping that can be used across multiple companies. This eliminates the need to create duplicate mappings such as coverage tier and relationship per company.

### 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.

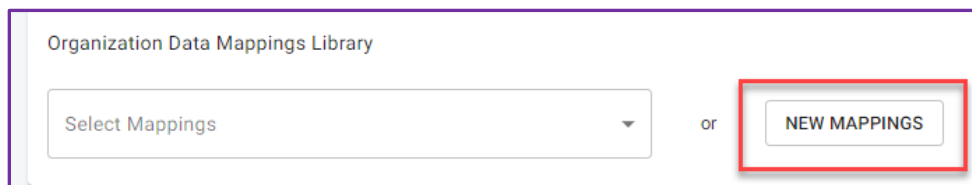


### NEW MAPPINGS

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

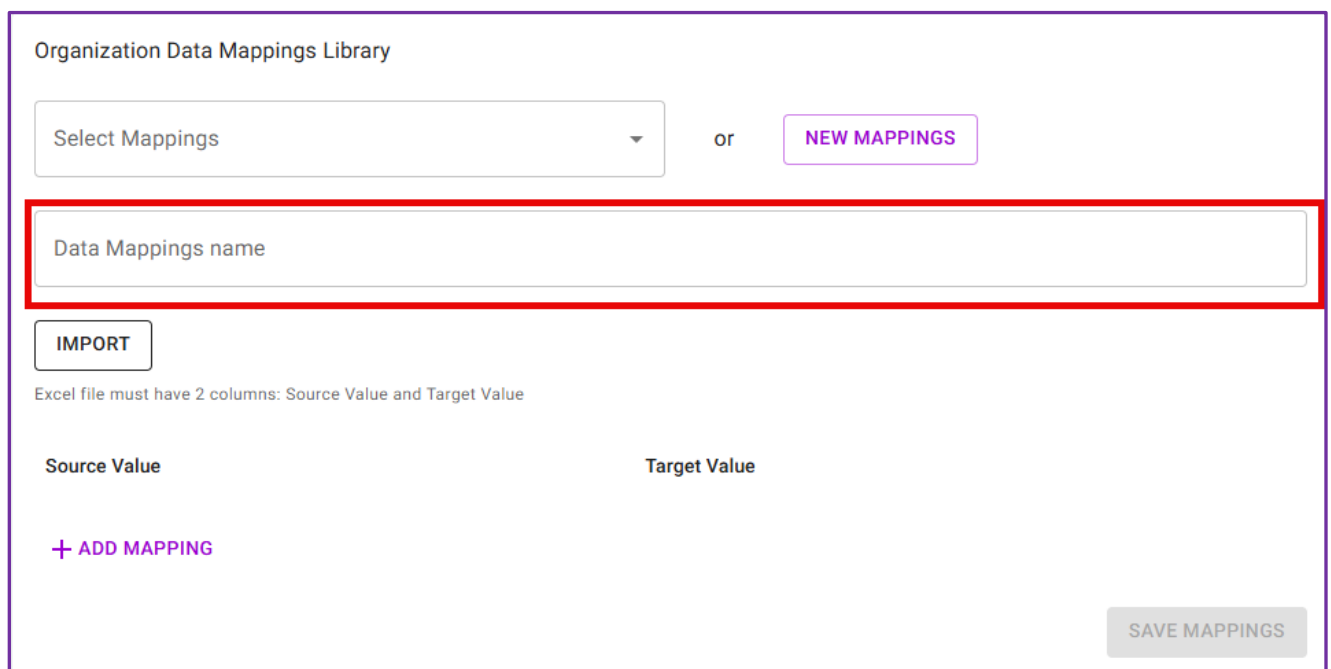


Organization Data Mappings Library

Select Mappings or **NEW MAPPINGS**

## 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.



Organization Data Mappings Library

Select Mappings or **NEW MAPPINGS**

**Data Mappings name**

**IMPORT**

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

Source Value	Target Value
<b>+ ADD MAPPING</b>	

**SAVE MAPPINGS**

## 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.

Organization Data Mappings Library

Select Mappings ▼ or [NEW MAPPINGS](#)

Data Mappings name  
2025-2026 BCBS Medical Plan

[IMPORT](#)

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

Source Value	Target Value
Source Medical Plan 1	Target PPO <span>×</span>
Source Medical Plan 2	Target HSA <span>×</span>

[+ ADD MAPPING](#)

[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.

[IMPORT](#)

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

## 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.

The screenshot shows two side-by-side panels of the 'Organization Data Mappings Library'. The left panel shows a search for 'ACA Mapping' and a 'COPY MAPPINGS' button. A red dashed arrow points from this button to the right panel. In the right panel, the 'Data Mappings name' field is populated with 'ACA Mapping (Copy)'. Both panels show a table of source and target values for 'ACA Mapping'.

Source Value	Target Value
Fulltime-Regular	Eligible (Regularly works more than 30 hours a weel)
Fulltime-Temporary	Eligible (Regularly works more than 30 hours a weel)
Parttime-Regular	Ineligible (Regularly works less than 30 hours a wee)
Parttime-Temporary	Ineligible (Regularly works less than 30 hours a wee)



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

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

Confirm below to permanently delete data mappings: **BCBS Cov Type - EN Cov Level**

CANCEL DELETE

CONFIRM DELETE



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

Data Mappings name Deduction Code	
<b>Source Value</b>	<b>Target Value</b>
Source STD	Target STD 14 day
Source STD	Target STD 30 day

Data Mappings name Deduction Code	
<b>Source Value</b>	<b>Target Value</b>
Source STD 14 day	Target STD
Source STD 30 day	Target STD

## 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.

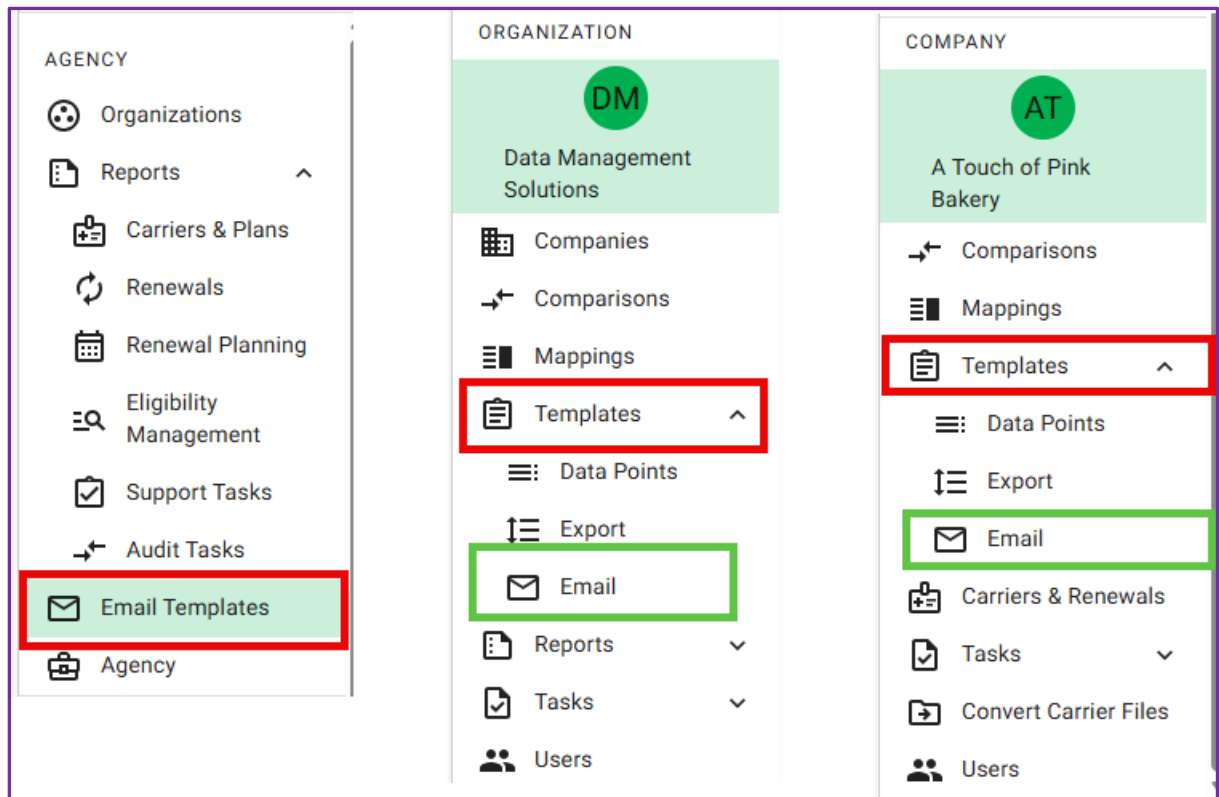
**PLEASE NOTE: Any data point and export template shared with an organization and created by an organization administrator, or an organization compare user can be utilized under any company within that specific organization. Company admins which are available under our Platinum Elite subscription will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

Employee SSN

Social Security Number

First Name

Middle Name

Last Name

DOB

Employment Status

#### Secondary File

Employee SSN

Social Security Number

First Name

Middle Name

Last Name

DOB

Employment Status

Unique Identifier

Unique Identifier

Unique Identifier

Unique Identifier

Unique Identifier

Unique Identifier

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:

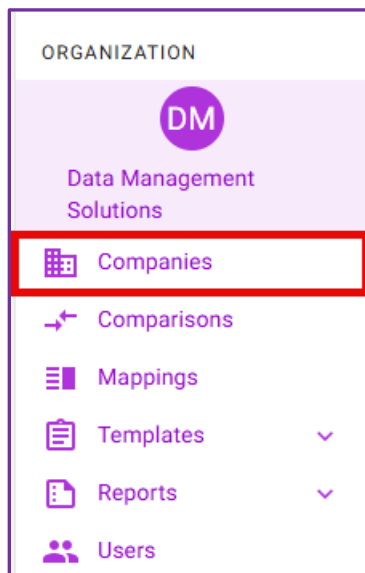
- Company name
- Active status
- Updated at timestamp
- Termination date and reason
- Activation date
- First demo date
- Any associated notes

**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.

Company Name	Org Contact 1	Org Contact 2	Active	Updated At
ABC COMPANY	malanier2024	malanier2024	Yes	5/20/2025
A TOUCH OF PINK BAKERY	malanier2024		Yes	10/21/2025

Choose file and click IMPORT.

Import Companies

The file should be an Excel file matching the downloadable import template structure. Any additional columns or cells not formatted as Text, will cause the import to fail.

Choose File dms-compani...rt-template.xlsx

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.

ORGANIZATION

DM

Data Management Solutions

Companies

Comparisons

Mappings

Templates

## Companies

Data Management Solutions / Companies

FILTERS EXPORT

Company Name	Org Contact 1	Org Contact 2	Active	Updated At
ABC COMPANY	malanier2024	malanier2024	Yes	5/20/2025
A TOUCH OF PINK BAKERY	malanier2024		Yes	10/21/2025

ADD A NEW COMPANY

IMPORT COMPANIES

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.


New Company


Name


Demo


Demo


Activation Date 

First Demo Date 

Primary Organization Contact 

Secondary Organization Contact 

GA Renewal Contact 

Benefit Admin System 

Notes


Implementation

Kickoff Implementation Task




**SAVE**

## Deactivate a Company

To deactivate a company, click EDIT

Information		
Company Name A Touch of Pink Bakery	Organization Name Data Management Solutions	

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.**

Edit Company	
Company Name ABC Company	
Notes	
Active <input type="checkbox"/> Active	
Demo <input type="checkbox"/> Demo	
Termination Date	
Termination Reason	
Activation Date	

## 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.

The screenshot displays the 'Data Management Solutions-DVP Internal Use' dashboard. It features several sections: 'Information' with fields for Organization Name, Users Count, Total Companies Count, and Inactive Companies Count; 'Companies' listing ABC Company, Demo Company 1, DS: Demo Company, and JB: Test company; 'Benefit Admin Systems' (highlighted with a red box) listing Employee Navigator, Selerix, and Other 2; and 'Service Types' listing BBS License and Audit Services. Each section has an 'EDIT' or 'NEW' button.

[Add a Benefit Admin System](#)

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

Click NEW

This is a close-up of the 'Benefit Admin Systems' section from the previous screenshot. It shows a list of three systems: 'Employee Navigator' (contract began 01/01/2020), 'Selerix' (contract began 01/01/2022), and 'Other 2' (added 04.29.2025). A red box highlights the 'NEW' button in the top right corner of the section.

Click NEW BENEFIT ADMIN SYSTEM

Organization Benefit Admin Systems

Select Existing Benefit Admin System ▼ or **NEW BENEFIT ADMIN SYSTEM**

Select the benefit admin system from the available dropdown.

New Benefit Admin System ▲

- Employee Navigator
- Ease
- Selerix
- Plan Source
- BSwift
- Paycom
- UKG Ready
- UKG Pro
- Other
- Other 2
- Other 3

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

Organization Benefit Admin Systems

Select Existing Benefit Admin System ▼ or **NEW BENEFIT ADMIN SYSTEM**

New Benefit Admin System ▼  
Employee Navigator

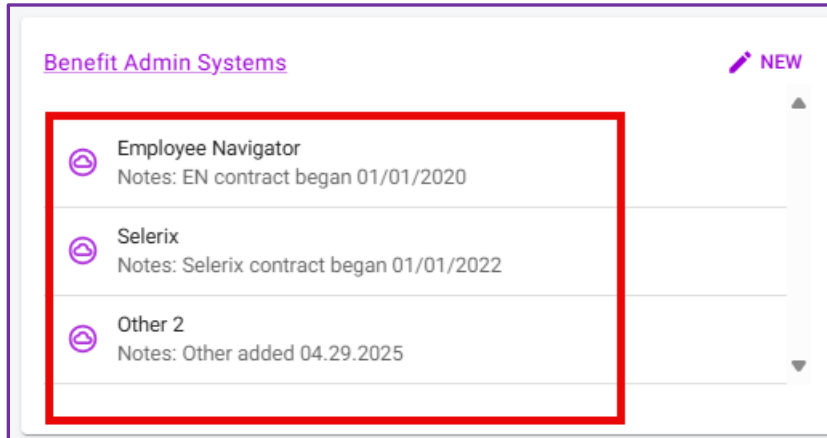
Notes

**SAVE**




[Edit/Delete a Benefit Admin System](#)

Navigate to the Organizations landing page

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

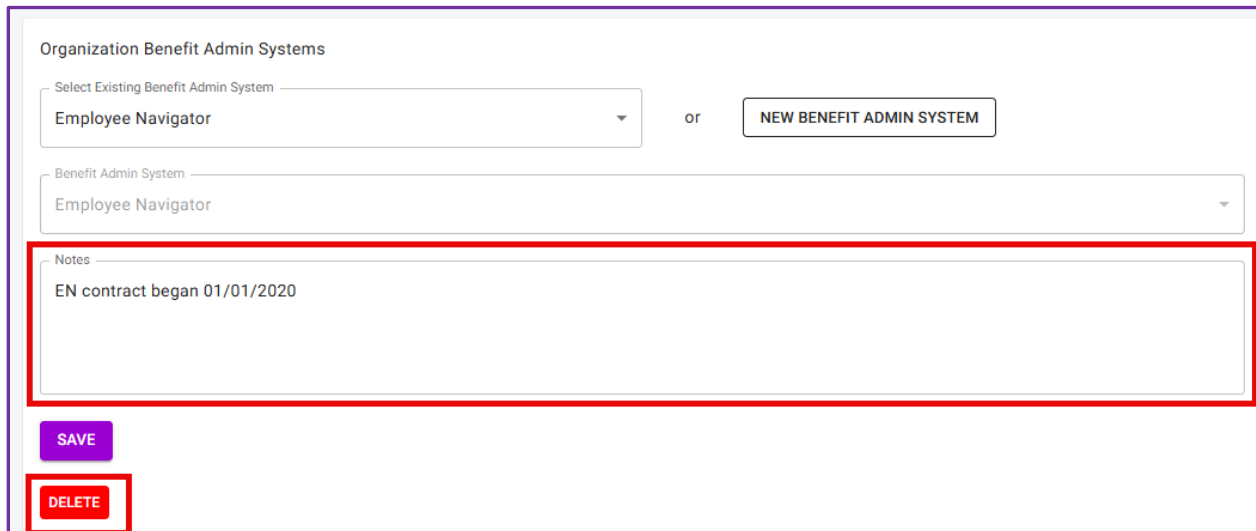


**Benefit Admin Systems** NEW

-  **Employee Navigator**  
Notes: EN contract began 01/01/2020
-  **Selerix**  
Notes: Selerix contract began 01/01/2022
-  **Other 2**  
Notes: Other added 04.29.2025

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.



**Organization Benefit Admin Systems**

Select Existing Benefit Admin System  or

Benefit Admin System

Notes

## 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:

The screenshot shows two side-by-side panels. The left panel, titled 'Benefit Admin Systems', contains three items: 'Employee Navigator' (Notes: EN contract began 01/01/2020), 'Selerix' (Notes: Selerix contract began 01/01/2022), and 'Other 2' (Notes: Other added 04.29.2025). The right panel, titled 'Service Types', is highlighted with a red border and contains two items: 'BBS License' (Cost: 89.99, Billing Frequency: Monthly, Notes: This was the first service type) and 'Audit Services' (Cost: 547.00, Billing Frequency: Quarterly, Notes: Audit services are billed quarterly).

Non-Billing Contact:

The screenshot shows two side-by-side panels. The left panel, titled 'Benefit Admin Systems', contains three items: 'Employee Navigator' (Notes: EN contract began 01/01/2020), 'Selerix' (Notes: Selerix contract began 01/01/2022), and 'Other 2' (Notes: Other added 04.29.2025). The right panel, titled 'Service Types', is highlighted with a red border and is completely empty.

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

## Service Types

[Data Management Solutions](#) / [Service Types](#)

View the Service Types in effect for this organization.

Organization Service Types

Select Existing Service Type

4. Complete the following:

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

Organization Service Types

Select Existing Service Type

Name

Service Type

Billing Frequency

Cost

Notes

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

**AGENCY**

- Organizations
- Reports
- Email Templates
- Agency
- ORGANIZATION**
- Data Management Solutions
- Companies
- Comparisons
- Mappings
- Templates
- Reports
- Tasks

**COMPANY**

- Select a Company
- Comparisons
- COMPANY
- Select a Company
- Comparisons
- Mappings
- Templates
- Carriers & Renewals
- Tasks
- Eligibility Management
- Support Tasks
- Audit Tasks
- Convert Carrier Files
- Users

**Data Management Solutions**

**Information** [VIEW](#)

Organization Name Data Management Solutions	Users Count 15
Total Companies Count 64	Active Companies Count 54
Inactive Companies Count 10	Active Yes
Demo No	Plan Platinum Elite
Admin & Comparer Seats 23	Agency Notes Ability to adds notes for an organization (DMS Admin) Was able to add notes as Org Admin
Subscription Type Monthly	Subscription Received Date 1/3/2024
First Demo Date	Billing Name

**Companies** [NEW](#)

- ABC Company
- Acme Company
- A Touch of Pink Bakery
- Big Group
- Black Jack Company
- Broker Builder Test Company: 1
- Company created as a GA Agent
- Covenant of Water
- Daphney Test Edited
- demo3
- Demo Company 06.03.2025
- Development Group LLC

**Agency Connections** [CONNECT](#)

- Streamline my Data Agency  
Broker General Agent
- Broker Builder Solutions  
Broker General Agent
- IMA  
Broker General Agent
- My General Agent  
Administrator

**Benefit Admin Systems** [NEW](#)

- Employee Navigator  
Notes: First Use: 09/01/2022
- Other  
Notes: Added by Org Admin
- Other 2

**Service Types** [NEW](#)

- Agency Support created as Agency Admin  
Type: Agency Support  
Cost: 2500  
Billing Frequency: Annual
- Agency Support with Full Support  
Type: Agency Support  
Cost: 1500  
Billing Frequency: Annual  
Notes: Credit card on file.
- Agency Support with Limited Resources  
Type: Agency Support  
Cost: 152.00  
Billing Frequency: Monthly
- HR Support  
Type: HR Support  
Cost: 3585.00  
Billing Frequency: Case By Case

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## 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

**Service Types** [NEW](#)

Agency Support created as Agency Admin  
Type: Agency Support  
Cost: 2500  
Billing Frequency: Annual

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

## Service Types

[Data Management Solutions](#) / [Service Types](#)

View the Service Types in effect for this organization.

Organization Service Types

Select Existing Service Type

Agency Support created as Agency Admin  
Agency Support with Full Support  
Agency Support with Limited Resources  
HR Support

or

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.**

Organization Service Types

Select Existing Service Type

or

Name  
Agency Support with Limited Resources

Service Type  
Agency Support

Billing Frequency  
Monthly

Cost  
152.00

Notes

## 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.

ORGANIZATION

DM  
Data Management Solutions

Companies

Comparisons

Mappings

Templates

Reports

Users

COMPANY

Select a Company

## Companies

Data Management Solutions / Companies

FILTERS EXPORT

Company Name	Org Contact 1	Org Contact 2	Active	Updated At
ABC COMPANY	malanier2024	malanier2024	Yes	5/20/2025
A TOUCH OF PINK BAKERY	malanier2024		Yes	10/21/2025
BRITTANY DEMO	brokerverifier		Yes	9/10/2025
CARLA DEMO	brokerverifier		Yes	9/10/2025
CAULIFLOWER TESTING (INACT...			No	10/10/2025
CITY OF BRIDGERTON (INACTIV...			No	10/10/2025
DEMO COMP-08082024 (INACT...			No	10/10/2025

ADD A NEW COMPANY

IMPORT COMPANIES

IMPORT CARRIERS

IMPORT CARRIER PLANS

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 \(dms-datavalidate.com\)](https://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.

### Import Company Carriers

Data Management Solutions-DVP Internal Use / Companies / Import Company Carriers

Import an Excel file to bulk import multiple carriers for any of your organization's companies in a single step.

Import Companies

The file should be an Excel file matching the downloadable import template structure. Any additional columns, invalid carriers, invalid companies, or cells not formatted as Text, will cause the import to fail.

Carrier Import.xlsx

## Manually add Carriers

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

COMPANY

**AT**

A Touch of Pink Bakery

- Comparisons
- Mappings
- Templates
- Users
- Carriers & Renewals**
- Convert Carrier Files

Click NEW

### Carriers

FILTERS EXPORT

Carrier	Group Number	Renewal Month	Active
ADMIN AMERICA	7841	November	Yes
AMERITAS GROUP	AMG-123	December	Yes

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.

New Carrier

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

Group Number

Renewal Month

Renewal Kickoff Days In Advance

Carrier Invoice Day Of Month

Eligibility Management Type

Carrier Inception Date

Carrier End Date

Disable Renewals

Disable Renewals

Carrier Contact Name

Carrier Contact Email

Carrier Contact Phone

Secondary Carrier Contact Name

Secondary Carrier Contact Email

Secondary Carrier Contact Phone

Audit Service

Audit Service

Organization Eligibility Contact

Organization Audit Contact

Notes

SAVE

## 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.

Company Name	Org Contact 1	Org Contact 2	Active	Updated At
ABC COMPANY	malanier2024	malanier2024	Yes	5/20/2025
A TOUCH OF PINK BAKERY	malanier2024		Yes	10/21/2025
BRITTANY DEMO	brokerverifier		Yes	9/10/2025
CARLA DEMO	brokerverifier		Yes	9/10/2025
CAULIFLOWER TESTING (INACT...			No	10/10/2025
CITY OF BRIDGERTON (INACTIV...			No	10/10/2025
DEMO COMP-08082024 (INACT...			No	10/10/2025

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.

Import an Excel file to bulk import multiple carrier plans for any of your organization's companies in a single step.

Import Company Carrier Plans

The file should be an Excel file matching the downloadable import template structure. Any additional columns, invalid or missing carriers, invalid companies, or cells not formatted as Text, will cause the import to fail.

All carriers **MUST** be added to the company prior to importing plans.

Choose File | No file chosen

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.

COMPANY

**AT**

A Touch of Pink Bakery

- Comparisons
- Mappings
- Templates
- Users
- Carriers & Renewals**
- Convert Carrier Files

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
<b>CVS CAREMARK</b>	PIU-9874	August		Yes	
<b>CIGNA</b>	C123456	February		Yes	Demo
<b>UNITEDHEALTHCARE</b>	UH98745	January		Yes	
<b>ACCESS HEALTH</b>	789541	January		Yes	No notes

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

Carrier Information
[EDIT](#)

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

Carrier Plans

Plan Name	Benefit	Eligibility Management Type	Inception Date	End Date	Disable Renewals	Active
No Plans Exist						
<div style="border: 2px solid red; display: inline-block; padding: 5px 15px; border-radius: 5px;"> <a href="#">ADD A NEW PLAN</a> </div>						

Carrier Information
[EDIT](#)

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

Carrier Plans

[ADD A NEW PLAN](#)

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

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

Complete all required fields highlighted in red and any optional fields highlighted in yellow, if applicable. The fields highlighted in Green are for Agency use only and are not editable to the 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:

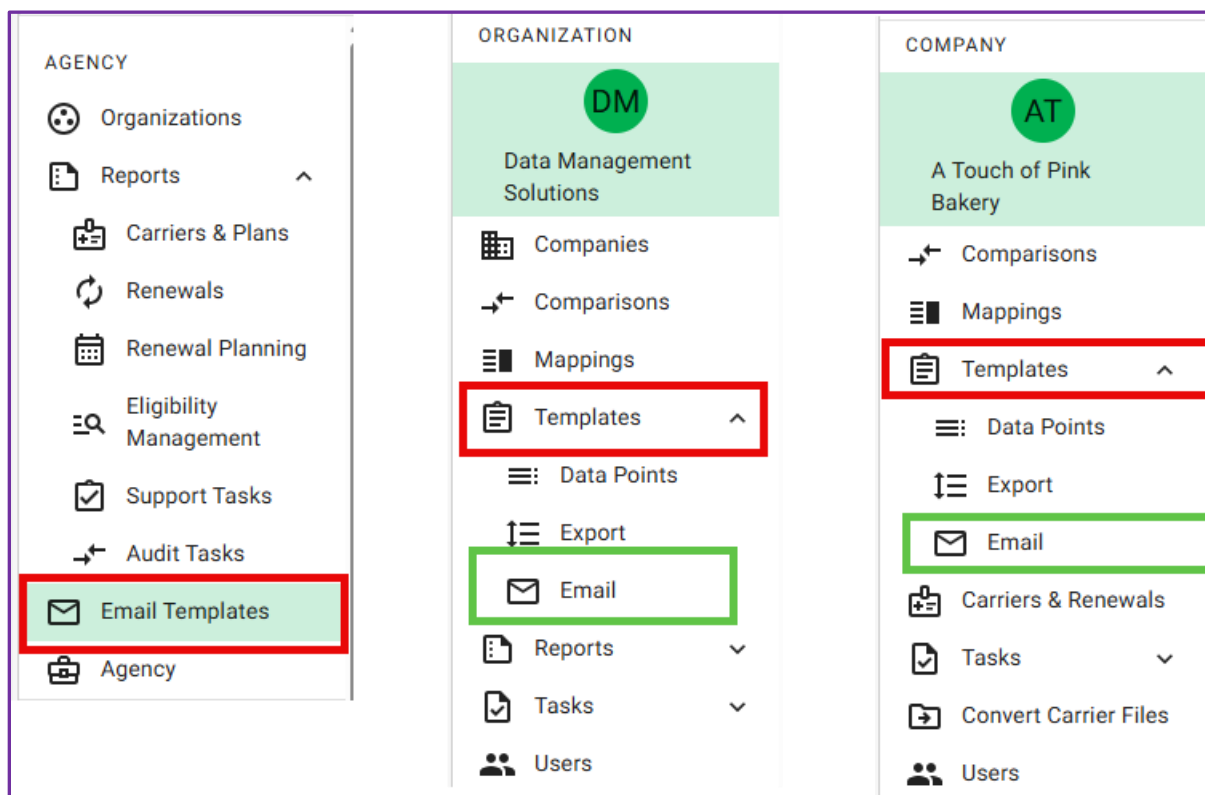
- Include dynamic data like carrier name, discrepancy counts, and renewal month in your emails for more personalized and informative communication.

## 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.

## Email Templates

Browse the Email Templates available and customize them if desired.


### Agency Email Templates

Email Templates

- 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

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

Agency Email Templates

Email Templates  
Audit Task Assignment 

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

Email subject

Insert token



{{agency\_name}}: You have been assigned to {{company\_name}} audit task: {{audit\_task\_name}}.

Email body

Paragraph | B I ↻ | Insert token

Hello {{assignee\_first\_name}} {{assignee\_last\_name}},  
You have been assigned a new audit task: {{audit\_task\_name}} for company: {{company\_name}}. A comment may be included below.  
{{task\_notes}}  
{{audit\_task\_direct\_link\_with\_log\_in\_message}}  
Thank you,  
on behalf of {{from\_first\_name}} {{from\_last\_name}}, {{agency\_name}}

Agency Email Templates

Email Templates  
Audit Task Assignment  

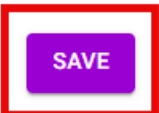
This is a custom email template. It was last updated on 3/30/2026 by: gaagent. Click the edit button above to customize it, or click the delete button to restore the system default template.

Email subject

Insert token

{{agency\_name}}: You have been assigned to {{company\_name}} audit task: {{audit\_task\_name}}.

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

CANCEL 

## 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?

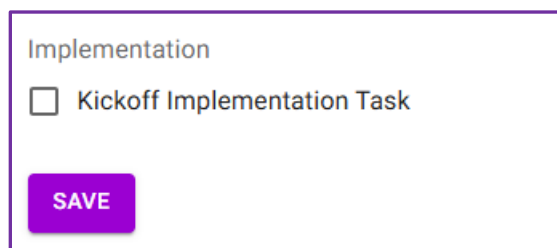
**GA (General Agent) / Organization Admin** → Starts the implementation, reviews/approves, enters testing details, closes task.

**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



Implementation

Kickoff Implementation Task

SAVE

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


**Heaven to Earth Skydiving & Training Center**

<p><b>Information</b> <span style="float: right;">✎ EDIT</span></p> <table style="width: 100%;"> <tr> <td style="width: 50%;"> <p><b>Company Name</b> Heaven to Earth Skydiving &amp; Training Center</p> </td> <td style="width: 50%;"> <p><b>Organization Name</b> Data Management Solutions</p> </td> </tr> <tr> <td> <p><b>Comparisons Count</b> 0</p> </td> <td> <p><b>Users Count</b> 0</p> </td> </tr> <tr> <td> <p><b>Carriers Count</b> 3</p> </td> <td> <p><b>Active</b> Yes</p> </td> </tr> <tr> <td> <p><b>Demo</b> No</p> </td> <td> <p><b>Primary Org Contact</b> gaagent (GA Agent)</p> </td> </tr> <tr> <td> <p><b>Primary Org Contact Email</b> gaagent25@gmail.com</p> </td> <td> <p><b>Benefit Admin System</b> Employee Navigator</p> </td> </tr> </table>	<p><b>Company Name</b> Heaven to Earth Skydiving &amp; Training Center</p>	<p><b>Organization Name</b> Data Management Solutions</p>	<p><b>Comparisons Count</b> 0</p>	<p><b>Users Count</b> 0</p>	<p><b>Carriers Count</b> 3</p>	<p><b>Active</b> Yes</p>	<p><b>Demo</b> No</p>	<p><b>Primary Org Contact</b> gaagent (GA Agent)</p>	<p><b>Primary Org Contact Email</b> gaagent25@gmail.com</p>	<p><b>Benefit Admin System</b> Employee Navigator</p>	<p><b>Comparisons</b> <span style="float: right;">✎ NEW</span></p> <p>No Comparisons Exist</p>
<p><b>Company Name</b> Heaven to Earth Skydiving &amp; Training Center</p>	<p><b>Organization Name</b> Data Management Solutions</p>										
<p><b>Comparisons Count</b> 0</p>	<p><b>Users Count</b> 0</p>										
<p><b>Carriers Count</b> 3</p>	<p><b>Active</b> Yes</p>										
<p><b>Demo</b> No</p>	<p><b>Primary Org Contact</b> gaagent (GA Agent)</p>										
<p><b>Primary Org Contact Email</b> gaagent25@gmail.com</p>	<p><b>Benefit Admin System</b> Employee Navigator</p>										
<p><b>Carriers</b> <span style="float: right;">✎ NEW</span></p> <ul style="list-style-type: none"> <li> 90 Degree Benefits</li> <li> Access Health</li> <li> Alliant Health Plan</li> </ul>	<p><b>Implementation Tasks</b> <span style="float: right;">✎ NEW</span></p> <p>No Implementations Exist</p>										

- 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.

## Add New Implementation



[Heaven to Earth Skydiving & Training Center](#) / Add New Implementation

Complete the form below to create a new implementation task for this company.

**New Implementation**

Implementation Name

Primary Organization Contact

Email: gaagent25@gmail.com

Secondary Organization Contact

GA Assignee

Benefit Admin System

**Emails**

Disable Emails

Check this box to disable all system generated emails for this implementation. NOTE: emails will be disabled for this entire implementation process, with no mechanism to re-enable them.

**SAVE**

- **IF DISABLE EMAILS IS NOT CHECKED**, 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**

Location Type Office	Name
Address	City
State	Zip
County	Contact Name
Contact Email	Notes

- **Division**

Location Type Division	Name
Notes	

- **Department**

Location 1	
Location Type Department	Name
Notes	

- **Business Unit**

Location Type Business Unit	Name
Tax ID	Notes

- **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

**Plans Checklist**

Each plan requires its implementation details to be submitted before the entire plans checklist can be submitted to the GA Contact for review.

Plan Name  
Plan 1 (Allied National) ▼

Plan Details ▼

**Implementation Details** ▲

Is this plan being implemented?  
Yes ▼

General Plan Implementation Notes

**General Plan Documents**

Only add documents applicable to this specific plan. For documents applicable to all plans, add on the plans checklist page.

No General Plan Documents found.

[ADD FILE](#)

Rates, Rounding, Contributions, or Plan Limits Notes

**Rates, Rounding, Contributions, or Plan Limits Documents**

Only add documents applicable to this specific plan. For documents applicable to all plans, add on the plans checklist page.

No Rates, Rounding, Contributions, or Plan Limits Documents found.

[ADD FILE](#)

In the Eligibility Notes below, please specify if eligibility varies by class and if so which classes are eligible for this plan.

Eligibility Notes

**Eligibility Documents**

Only add documents applicable to this specific plan. For documents applicable to all plans, add on the plans checklist page.

No Eligibility Documents found.

[ADD FILE](#)

Comments ▼

[BACK](#) [SUBMIT PLAN INFORMATION](#)

- 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.

Plans Checklist

Each plan requires its implementation details to be submitted before the entire plans checklist can be submitted to the GA Contact for review.

**Steps to complete plans checklist:**

1. **Plans Checklist** - Add all benefit plans to be implemented. This should include plan documents and rate tables. If you have documents that are applicable to all plans, you may add them in Step 2.
2. **Add Documents** - This step should be used to add documents that are specific to ALL plans.
3. **Post Comments** - If you have additional comments or specific information to communicate, add the information in the comments
4. **Submit Plans Checklist**

Plans Checklist ^

Plan Name	Carrier	Benefit Type	Status	Implementing?
LOW OPTION	Alliant Health Plan	Dental	✓ SUBMITTED	Yes

1-4 of 4 < >

[+ ADD NEW PLAN](#)

Plans Documents ^

Documents Applicable to All Plans

No Documents Applicable to All Plans found.

[ADD FILE](#)

[SAVE DOCUMENTS](#)

Comments v

**SUBMIT PLANS CHECKLIST**

## Step 4: GA Reviews & Collaborates

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

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

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

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

- **GA Review Plans Checklist – Approval**

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

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

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

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

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

the organization contacts

The screenshot shows a web form with a 'Comments' text area at the top. Below it are three buttons: a grey 'BACK' button, a purple 'APPROVE PLAN INFORMATION' button, and a red 'REQUEST CHANGES' button. The 'REQUEST CHANGES' button is highlighted with a red border.

- 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.

The screenshot shows a form titled 'GA Setup Demo Environment'. Below the title is the instruction: 'Please provide the demo environment information below and submit it for review by the Organization Contacts.' The form contains a large text area for 'Demo Environment Notes', a 'Comments' field, and a purple 'SUBMIT DEMO ENVIRONMENT INFORMATION' button at the bottom, which is highlighted with a red border.

- Organization is notified by automated email and begins testing in the **Benefit Administration System**.
- Request Changes:

- If changes are needed, the Organization user will add a comment and/or files requesting the change to the Benefit Administration system and click **Request Change**.
- After successful testing:
  - Organization checks all acknowledgment boxes if all testing was successful.
  - Clicks **Go Live** (button activates only when all boxes are checked).

### Review Demo Environment

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

#### Demo Environment Information

Demo Environment Notes

Demo Users:  
username: Demo  
password: Testing

Please check everything.

#### Demo Environment Review Checklist

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

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

#### Comments

GO LIVE REQUEST CHANGES

**Demo Environment Review Checklist**

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

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

Comments

**GO LIVE** **REQUEST CHANGES**

## Step 7: 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.

Implementation: Heaven to Earth Skydiving & Training Center-DEMO

Heaven to Earth Skydiving & Training Center / Heaven to Earth Skydiving & Training Center-DEMO - Live

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

Information

Live

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

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

Comments

**Comments** ^

Add a comment if you'd like to provide any additional context or information.

Paragraph ▾ | **B** | *I* | ☰ | ☰

GA Internal Comment

If this comment applies to a particular Plan please select it below.


Plan ▾

Attachments

[ADD FILE](#)

SUBMIT COMMENT

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

**Implementation: Heaven to Earth Skydiving & Training Center-DEMO** 

[Heaven to Earth Skydiving & Training Center](#) / Heaven to Earth Skydiving & Training Center-DEMO - Live

Client Information

Plans Checklist

GA Review Client Information

GA Review Plans Checklist

GA Setup Demo Environment

Review Demo Environment

Live

Information ▾

**Live**

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

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

Comments ▾

COMPLETE & CLOSE TASK

- 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.

The screenshot displays the Streamline application interface. On the left, the navigation sidebar is visible, with the 'Carriers & Renewals' option highlighted in a red box. The main content area is divided into three sections: 'Carriers', 'Renewals', and a 'NEW' button. The 'Carriers' section contains a table with the following data:

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

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

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

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

- 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**.

New Renewal

Renewal Month ▼

Renewal Beginning Plan Year ▼

Emails

Disable Emails

Check this box to disable all system generated emails for this renewal. NOTE: emails will be disabled for this entire renewal process, with no mechanism to re-enable them.

**SAVE**

- **IF DISABLE EMAILS IS NOT CHECKED**, 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



notifications@dms-datavalidate.com

To: You



Thu 10/23/2025 9:46 AM

Hello [REDACTED]

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

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

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

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

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

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



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

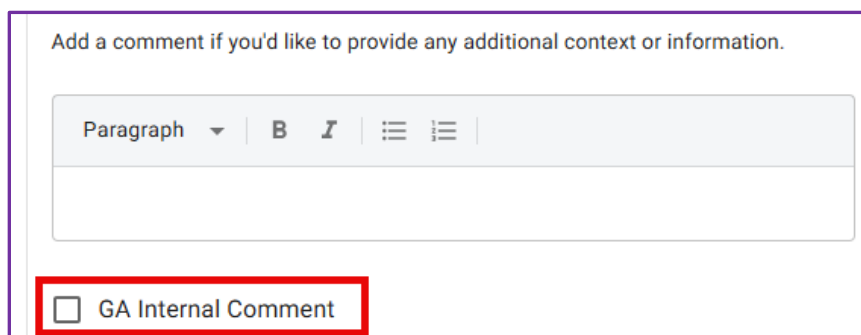
### Information EDIT

Company Name Fire Solutions Data Management	Organization Name Data Management Solutions: Testing
Comparisons Count 2	Users Count 3
Carriers Count 1	Active Yes
Primary Org Contact marytester (Mary Lanier)	Primary Org Contact Email
Primary Org Contact Phone	Secondary Org Contact
GA Renewal Contact mlanier (Mary Lanier)	GA Renewal Contact Email support@dms-datavalidate.com
Notes	

## Step 2: Organization Completes Client Information

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

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



The screenshot shows a comment input form with the following elements:

- Text prompt: "Add a comment if you'd like to provide any additional context or information."
- Rich text editor toolbar: Includes a dropdown menu set to "Paragraph", and icons for Bold (B), Italic (I), Bulleted List, and Numbered List.
- Text input area: A large empty text box for entering the comment.
- Checkbox: A checkbox labeled "GA Internal Comment" is located at the bottom left of the form and is highlighted with a red rectangular box.

- 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:**

- 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.
- 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.
- Add Documents** - Use this step only to upload documents that are applicable to all plans.
- Post Comments** - If you have additional comments or specific information to communicate, add the information in the comments.
- 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).

The screenshot shows a web form for plan renewal. At the top, there is a dropdown menu for 'Plan Name' with the selected value '2025 Dental High (Admin America)'. Below this is another dropdown for 'Plan Details'. The 'Renewal Details' section is expanded, showing a question 'Is this plan renewing?' with a dropdown menu set to 'No'. Below the question is a text area for 'General Plan Renewal Notes'. At the bottom of the form is a 'Comments' section. At the very bottom, there are two buttons: a grey 'BACK' button and a purple 'SUBMIT PLAN INFORMATION' button.

- 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

### Renewal Details

Is this plan renewing?  
Yes

General Plan Renewal Notes

General Plan Documents  
No General Plan Documents found.  
[ADD FILE](#)

Are Rates, Rounding, Contributions, or Plan Limits Changing?

Rates, Rounding, Contributions, or Plan Limits Changing Notes

Rates, Rounding, Contributions, or Plan Limits Documents  
No Rates, Rounding, Contributions, or Plan Limits Documents found.  
[ADD FILE](#)

Is eligibility changing?

Eligibility Changing Notes

Eligibility Documents  
No Eligibility Documents found.  
[ADD FILE](#)

Comments

[BACK](#) [SUBMIT PLAN INFORMATION](#)

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

Plans Checklist

Plan Name	Carrier	Benefit Type	Status	Renewing?
2026 DENTAL PLAN	Delta Dental of CA	Dental	✓ SUBMITTED	No
2026 MEDICAL PLAN HIGH OPTION	Cigna	Medical	! IN PROGRESS	
2026 VISION PLAN	Cigna	Vision	! IN PROGRESS	
GUARDIAN ENROLLMENT TO EN (VISION)	Access Health	Group ADD	! IN PROGRESS	

- If adding new or replacement plans →

- Click ADD NEW PLAN

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	

1-2 of 2 < >

+ ADD NEW PLAN

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

**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 ▼  
 July

Plan Name

Benefit Type ▼

SAVE
CANCEL

- 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

1-3 of 3 < >

+ ADD NEW PLAN

Plans Documents
▼

Comments
▼

SUBMIT PLANS CHECKLIST

## 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**.

A screenshot of a user interface showing a 'Comments' text area at the top. Below it are three buttons: 'SKIP' (grey), 'APPROVE CLIENT INFORMATION' (purple, highlighted with a green border), and 'REQUEST CHANGES' (red).

- **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

A screenshot of a user interface showing a 'Comments' text area at the top. Below it are three buttons: 'SKIP' (grey), 'APPROVE CLIENT INFORMATION' (purple), and 'REQUEST CHANGES' (red, highlighted with a red border).

- **GA Review Plans Checklist – Approval**

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

REQUEST CHANGES TO PLANS CHECKLIST

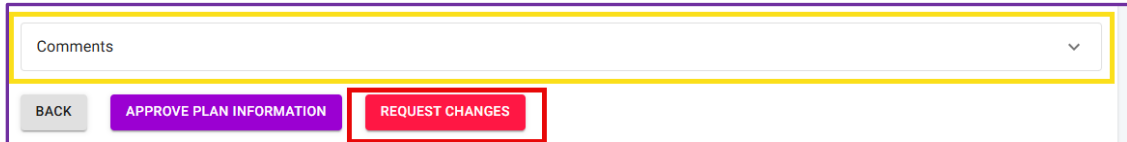
Plan Name	Carrier	Benefit Type	Status	Renewing?
2025 DENTAL HIGH	Admin America	Dental	! GA REVIEW	Yes
2025 MEDICAL OPTION 2-PPO PLAN	Admin America	Dental	! GA REVIEW	Yes

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

A screenshot of a user interface showing a 'Comments' text area at the top. Below it are three buttons: 'BACK' (grey), 'APPROVE PLAN INFORMATION' (purple, highlighted with a green border), and 'REQUEST CHANGES' (red).

- **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



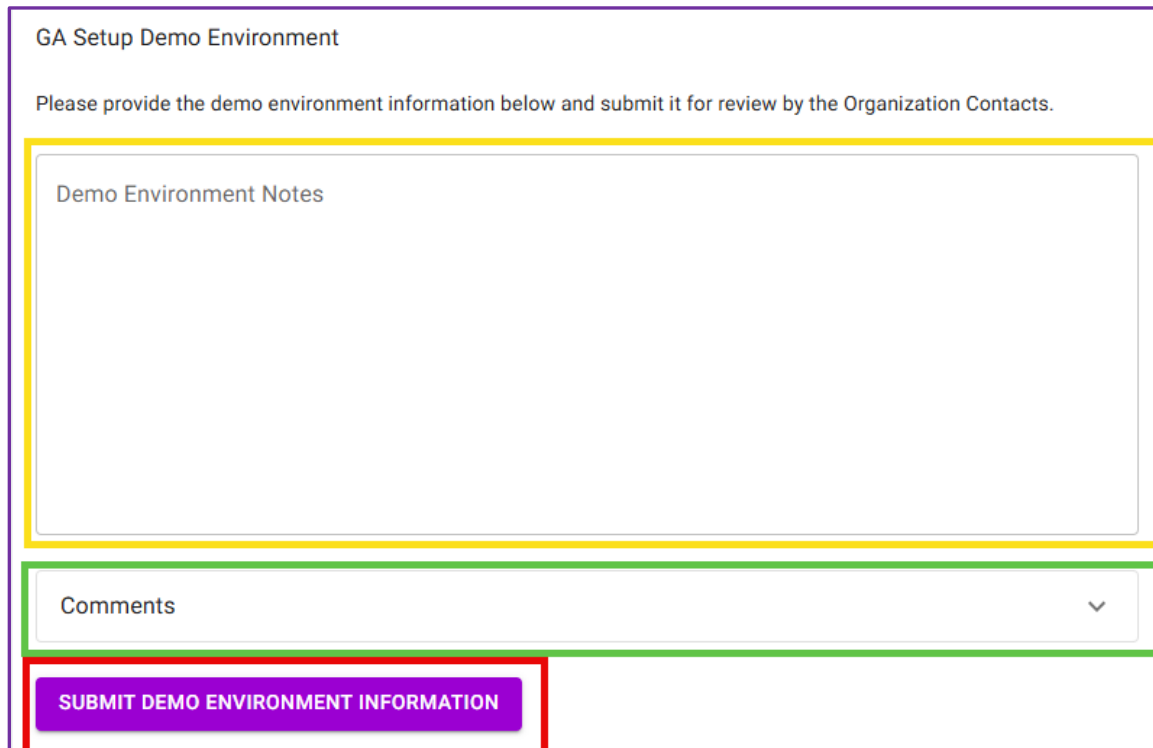
The screenshot shows a web interface for the 'GA Review Plans Checklist'. At the top, there is a text input field labeled 'Comments' with a dropdown arrow on the right. Below this field are three buttons: a grey 'BACK' button, a purple 'APPROVE PLAN INFORMATION' button, and a red 'REQUEST CHANGES' button. The 'REQUEST CHANGES' button is highlighted with a red border.

- 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**.



The screenshot shows the 'GA Setup Demo Environment' page. At the top, it says 'GA Setup Demo Environment' followed by the instruction: 'Please provide the demo environment information below and submit it for review by the Organization Contacts.' Below this is a large text area labeled 'Demo Environment Notes'. Underneath the notes area is a 'Comments' field with a dropdown arrow. At the bottom, there is a purple button labeled 'SUBMIT DEMO ENVIRONMENT INFORMATION' which is highlighted with a red border.

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

Review Demo Environment

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

Demo Environment Information

Demo Environment Notes

Demo Users:  
username: Demo  
password: Testing

Please check that all plans are visible with correct rates.

Demo Environment Review Checklist

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

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

Comments

GO LIVE   **REQUEST CHANGES**

**Demo Environment Review Checklist** ^

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

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

Comments v

GO LIVE

REQUEST CHANGES

## Step 7: Renewal Completion

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

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

**Renewal: 2025, October**

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

Client Information

Plans Checklist

GA Review Client Information

GA Review Plans Checklist

GA Setup Demo Environment

Review Demo Environment

Live

Live

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

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

Comments v

The screenshot shows a progress bar at the top with seven steps, all marked with a checkmark: Client Information, Plans Checklist, GA Review Client Information, GA Review Plans Checklist, GA Setup Demo Environment, Review Demo Environment, and Live. Below the progress bar, the 'Live' status is confirmed with a message: 'This renewal is marked to go live! You can view the details of this renewal by viewing the information on the prior steps. If you have any questions, or need to make changes or upload documents pertaining to this renewal, please submit a comment with this information below.' A red box highlights the 'Comments' section, which includes a text editor with a toolbar (Paragraph, Bold, Italic, Bulleted List, Numbered List) and a dropdown menu for selecting a plan. Below the text editor is an 'Attachments' section with an 'ADD FILE' button. At the bottom of the red box is a 'SUBMIT COMMENT' button.

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

The screenshot shows the same renewal process interface as the previous one, but with the 'COMPLETE & CLOSE TASK' button highlighted in a red box. The progress bar at the top is identical. The 'Comments' section is now a simple text input field with a dropdown arrow on the right. The 'SUBMIT COMMENT' button is no longer visible.

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

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

## Companies Table for Renewals

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

The screenshot shows a web application interface for 'Data Management Solutions'. The main content area displays a table titled 'Companies' for 'Broker B: Data Management Solutions'. The table has four columns: 'Company Name', 'In Renewal', 'Org Contact 1', and 'Org Contact 2'. The 'In Renewal' column is highlighted with a red box and contains green checkmarks for several companies. The left sidebar has 'ORGANIZATION' and 'Companies' highlighted with red boxes.

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

## 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:

The screenshot shows the 'Eligibility Management' interface. On the left is a sidebar with navigation options: AGENCY (circled in red), Organizations, Reports, Carriers & Plans, Renewals, Renewal Planning, Eligibility Management (highlighted with a red box), Support Tasks, Audit Tasks, Email Templates, and Agency. The main content area is titled 'Eligibility Management' and includes a table of tasks. The table has columns for Organization, Company, Carrier Name, Task Name, Changes Date Range, and Task Type. Below the table are 'FILTERS' and 'EXPORT' options.

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

## Organization:

**Eligibility Management**  
Data Management Solutions / Eligibility Management

Eligibility Management Tasks

[NEW](#)

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

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

## Company:

**Eligibility Management**  
A Touch of Pink Bakery / Eligibility Management

Eligibility Management Tasks

[NEW](#)

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

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

1-8 of 25

## Company Carrier Level:

The screenshot displays the 'Alliant Health Plan' interface. The left sidebar shows the navigation menu with 'Carriers & Renewals' highlighted. The main content area is divided into two sections: 'Carrier Information' and 'Carrier Plans'.

**Carrier Information:**

Carrier	Alliant Health Plan	Group Number	98741252
Renewal Month	October	Renewal Kickoff Days In Advance	45
Carrier Invoice Day Of Month	15	Eligibility Management Type	Agency (O) Managed Manual Eligibility
Carrier Inception Date	1/1/2015	Disable Renewals	Yes
Active	Yes	Audit Service	No
GA Eligibility Contact	gaagent (GA Agent)	GA Eligibility Contact Email	gaagent25@gmail.com
GA Audit Contact		GA Audit Contact Email	

**Carrier Plans:**

Plan Name	Benefit	Eligibility Management Type
2025-2026 PLAN 2	Vision	Agency (O) Managed Manual ...
2027 PLAN YEAR MEDICA...	Medical	Agency (O) Managed Manual ...

**Eligibility Management Tasks:**

Task Name	Changes Date Range	Task Type	Processing/Error/Issue Type	Assign
ALLINANT OE CHANGES FOR ...	(n/a)	Open Enrollment Processing		tester_...
ABC COMPANY: SUPERIOR VI...	(n/a)	Error Report		tester...

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**.

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

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

## Company & Carrier Selection

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

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

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

## Select the Eligibility Management Task Type

Choose from the dropdown:

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

## New Eligibility Management Task

ABC Company / Carriers / AIG - American General / New Eligibility Management Task

New Eligibility Management Task

Company  
ABC Company

Carrier  
AIG - American General

Eligibility Management Task Type

Recurring Enrollment Processing

Open Enrollment Processing

Error Report

Issue

### Required Fields for Creating an Enrollment Processing Task

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

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

Examples:

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

**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.**

Name
Task Creator maryl (Mary Lanier)
Assignee
Changes From Date 
Changes 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

Carrier Portal
Email
Spreadsheet
Benefits Administration Portal
Proprietary File
Other

### Required Counts for Completion:

These fields are required for all processing types.



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

1. **Changed Enrollment Count** – number of enrollment changes; enter **0** if none
2. **Verified Enrollment Count** – number of items verified; enter **0** if none
3. **Demographic Changes Count** – number of demographic-only changes; enter **0** if none

Changed Enrollment Count
Verified Enrollment Count
Demographic Changes Count

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

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

Processing Submitted Date	
Processing Confirmed Date	

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



## 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:**

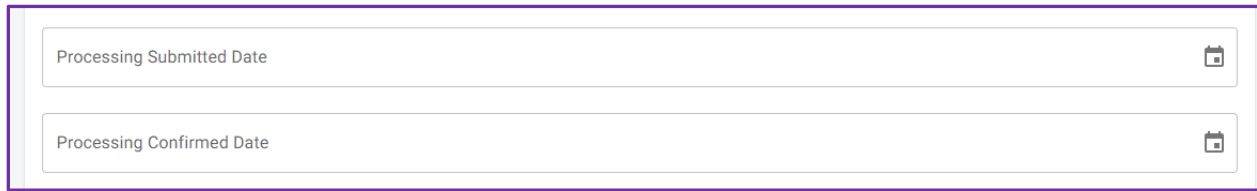
**ERROR REPORT RECEIPT TYPE:** Select how the error report was provided.


**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



Processing Submitted Date 

Processing Confirmed Date 

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



Upload Files

 **ADD FILE**

## Required Fields for Creating an Issue Task

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

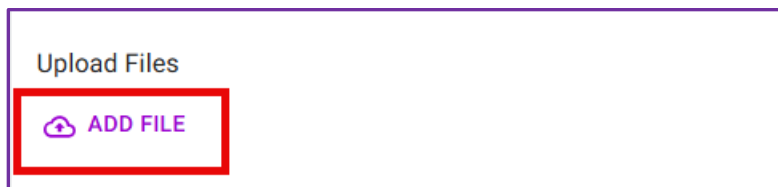
Best practice is to include both the **carrier's name** and the **date of the issue** or other information to create a unique name that is not repeatable for the specific company.

**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**.



Upload Files


 **ADD FILE**

## Final Steps for all Task Types

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

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

Upload Files

 ADD FILE

Notes

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

## Important Notes

- A completed task can be reopened if necessary.

**RE-OPEN TASK** **DELETE**

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

Notes

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

## Support Tasks

---

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

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

Available task types include:

- Plan Build
- Broker Support
- HR Support
- ACA
- Compliance
- Reporting
- 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**.

The screenshot shows the 'Support Tasks' interface. On the left, the navigation menu is visible with 'Support Tasks' highlighted. The main area shows a table of tasks with the following data:

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

## 3. Company & Carrier Selection

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

New Support Task

Data Management Solutions / Support Tasks / New Support Task

New Support Task

Company  
A Touch of Pink Bakery

Carrier (Optional)

Task Type

#### 4. Task Type

- Select **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**.

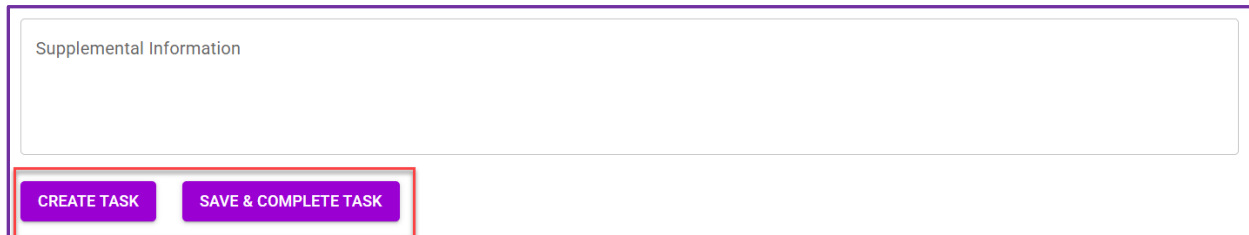
Upload Files

ADD FILE

## 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.



Supplemental Information

CREATE TASK SAVE & COMPLETE TASK

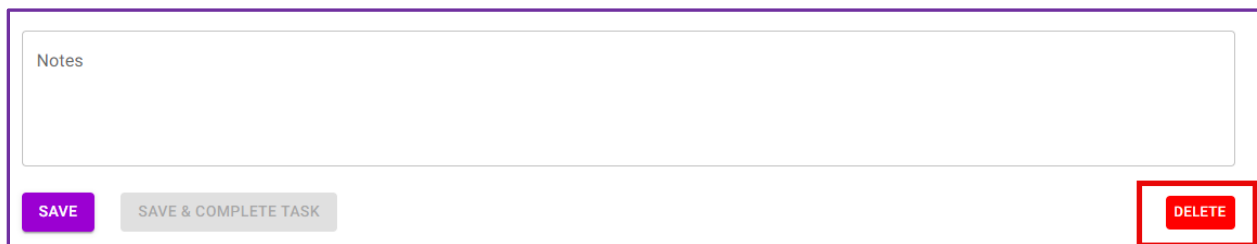
## Important Notes

- A completed task can be reopened if necessary.



RE-OPEN TASK DELETE

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



Notes

SAVE SAVE & COMPLETE TASK DELETE

## Audit Tasks

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

**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**.

The screenshot shows the 'Audit Tasks' page in the Streamline application. The left sidebar contains a navigation menu with 'Audit Tasks' selected. The main area displays a table of audit tasks. A 'NEW' button is highlighted in the top right corner of the table area.

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

### 3. Company & Carrier Selection

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

New Support Task

Data Management Solutions / Support Tasks / New Support Task

New Support Task

Company  
A Touch of Pink Bakery

Carrier (Optional)

Task Type

#### 4. Audit Type

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

#### Required Fields for Creating an Audit Task

**NAME:** Enter a unique 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.

Upload Files

**ADD FILE**

Comments

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

Supplemental Information

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

CREATE TASK

## Final Steps for all Task Types

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

Supplemental Information

**CREATE TASK** **SAVE & COMPLETE TASK**

## Important Notes:

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

The screenshot displays two side-by-side screenshots of the application interface. The left screenshot is titled 'Edit Audit Task' and shows a form for editing an audit task. A red box highlights a message: 'The following comparison has been created and linked to this task: Guardian Invoice March 2026 (see: Import Data)'. Below this, there are fields for 'Carrier (Optional)', 'Audit Type', 'Linked Comparison', 'Name', 'Task Owner', and 'Assignee'. A green box highlights the 'Upload Files' section, which lists three files: 'Carrier - Payroll Combined File.xlsx', 'Test Files for Demos.xlsx', and 'Test Files for Demos-mapping.xlsx'. The right screenshot is titled 'Guardian Invoice March 2026' and shows the 'Import Data' step. A red box highlights a message: 'This comparison is linked to this Audit Task: Guardian Invoice March 2026'. Below this, there is a section for 'The Audit Task files may be downloaded below' with three files and their download icons. A green box highlights this section. At the bottom, there are 'Baseline File' and 'Secondary File' sections, each with a 'Choose File' button. Red dashed arrows point from the highlighted message in the left screenshot to the highlighted message in the right screenshot, and from the highlighted files in the left screenshot to the highlighted files in the right screenshot.

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

The screenshot shows the 'Guardian Invoice March 2026' complete screen. At the top, there is a progress bar with all steps marked as complete: Create, Import Data, Select Data Points, Map Data, Compare, Verify Discrepancies, Verify Missing Data, and Complete. Below the progress bar, there is a 'Complete' section with a message: 'All discrepancies have been verified and this comparison is now completed! You may export the files containing the verified changes below.' A green box highlights a 'Comparison Details' dropdown menu. Below this, there is a 'Select file to export' dropdown menu. At the bottom, there are 'BACK' and 'GO TO ALL COMPARISONS' buttons, and a red box highlights the 'COMPLETE AUDIT TASK' button.

- 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!***

Comments ▼

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

Supplemental Information

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

## 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.

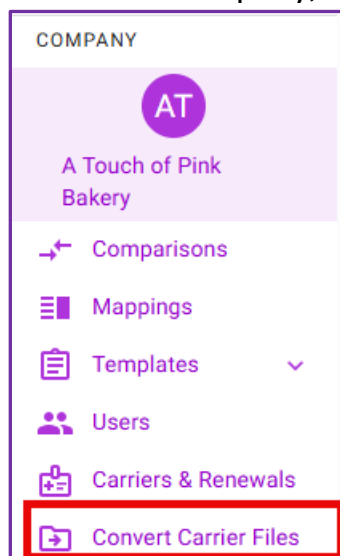
What This Functionality Does:

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.

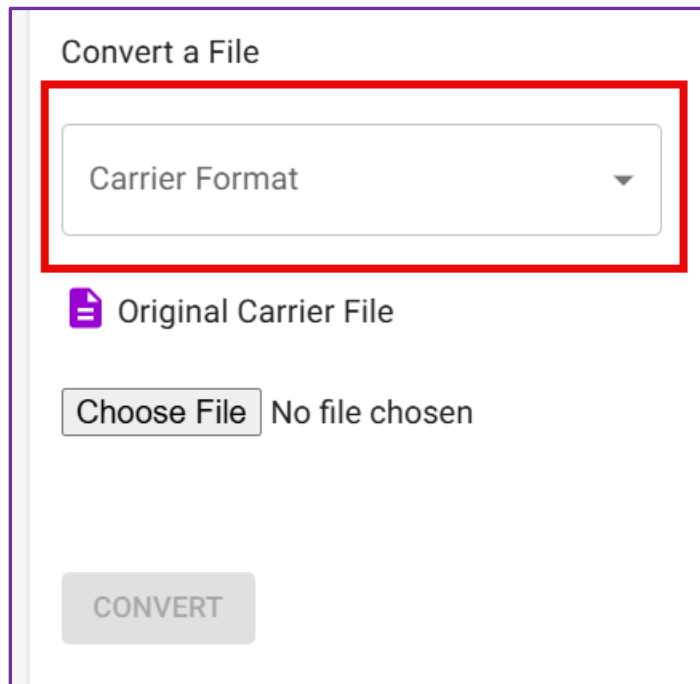
The converted file is then ready for audit use, significantly reducing manual effort and improving efficiency.

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.



Convert a File

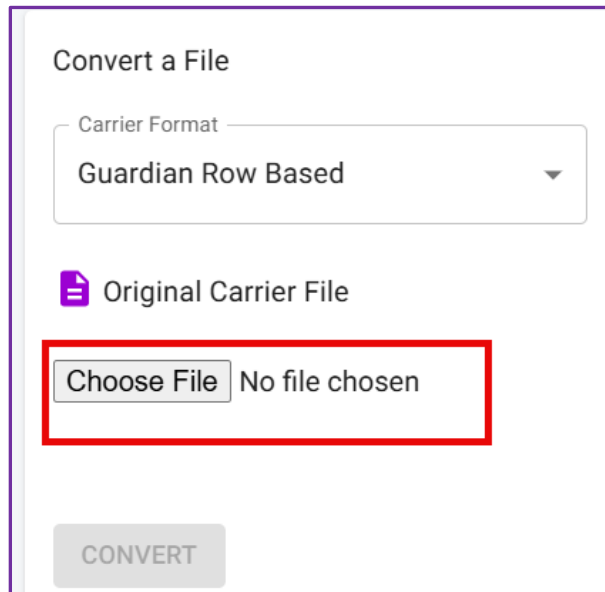
Carrier Format

Original Carrier File

Choose File No file chosen

CONVERT

- Click Choose File and select the carrier invoice



Convert a File

Carrier Format

Guardian Row Based

Original Carrier File

Choose File No file chosen

CONVERT

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

Convert a File

Carrier Format  
Guardian Row Based

Original Carrier File

Choose File Guardian Row ...sed Invoice.xls

Select Worksheet  
Download Bill

File Name  
Guardian Row Based Invoice .xls

**CONVERT**

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

 **File converted and downloaded successfully!** 

- 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.

View Reports

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

Select file to download

Comparison Details

Discrepancy Counts by Data Point

Missing Counts

Discrepancy Reports

- Original Baseline File - discrepancies only
- Original Secondary File - discrepancies only
- Original Baseline File
- Original Secondary File

21

Discrepancies

Missing Data

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

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

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

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

### **Original Baseline File / Original Secondary File**

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

### **All Records Including Verified**

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

- DMS\_Verified\_By
- DMS\_Auditor\_Notes
- DMS\_Verifier\_Notes
- DMS\_Discrepancy\_Type
- DMS\_Ignored\_Discrepancies

Select file to export  
 Base

**Customize Export - 'Base'**

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

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

No applicable Export Templates

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

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

Export Template Name

Share with Organization

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED

EXPORT V

BACK

GO TO ALL COMPARISONS

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

## Verified Records only

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

- DMS\_Verified\_By
- DMS\_Auditor\_Notes
- DMS\_Verifier\_Notes
- DMS\_Discrepancy\_Type

- Select file to export -  
 Base

**Customize Export - 'Base'**

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

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

No applicable Export Templates

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

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

Export Template Name

 Share with Organization
 

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED

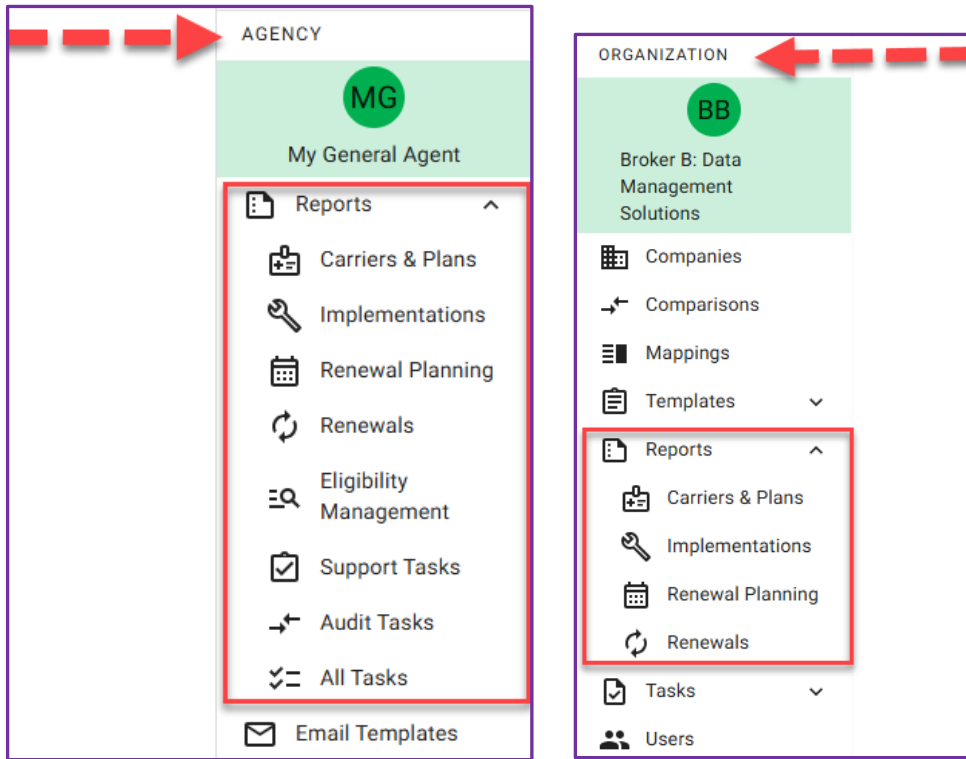
EXPORT VERIFIED RECORDS ONLY

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

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

## 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

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



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)

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**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

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
<a href="#">VIEW</a>	BROKER B: DAT...	DOMO'S CLIEN...	Domo's Client Imple...	6/3/2026	6/3/2026	Client Information
<a href="#">VIEW</a>	BROKER B: DAT...	TEST BUILD	Test Build	5/29/2026	5/29/2026	GA Review Client Informati
<a href="#">VIEW</a>	BROKER B: DAT...	DAPHNEY'S DE...	Daphney's Demo Com...	5/27/2026	5/27/2026	GA Review Plans Checklist

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**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



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	✓						

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**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



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	Current
<a href="#">VIEW</a>	DATA MANAGE...	WILLIE WONKA...	2026	October	3/13/2026	3/13/2026	Client I
<a href="#">VIEW</a>	DATA MANAGE...	WILLIE WONKA...	2027	October	3/13/2026	3/13/2026	Client I
<a href="#">VIEW</a>	DATA MANAGE...	TACOS PIZZA J...	2025	January	3/11/2026	3/11/2026	Plans C
<a href="#">VIEW</a>	DATA MANAGE...	TACOS PIZZA J...	2026	January	3/11/2026	3/11/2026	Client I
<a href="#">VIEW</a>	DATA MANAGE...	MARVEL	2026	January	3/11/2026	3/11/2026	Client I
<a href="#">VIEW</a>	DATA MANAGE...	A TOUCH OF PI...	2027	January	2/19/2026	2/19/2026	Client I
<a href="#">VIEW</a>	DATA MANAGE...	ABC COMPANY	2027	January	2/13/2026	2/13/2026	Client I
<a href="#">VIEW</a>	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

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



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	Compe
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

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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

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

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

## Benefit Systems

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

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

## Release Notes

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

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

## Revision History

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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 <a href="mailto:datatool@brokerbuildersolutions.com">datatool@brokerbuildersolutions.com</a> to <a href="mailto:support@dms-datavalidate.com">support@dms-datavalidate.com</a>	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