Release Update – *July 10, 2026*

Streamline (Data Management Solutions) is pleased to announce this week's enhancements and fixes to our application. Each enhancement and fix has been grouped by Solution Area (Data and/or Ben Ops) for easier identification and review.

New + Improved

Ben Ops Solution Area

File Implementation Tasks

We have introduced a new **File Implementation** task within the **Eligibility Management Tasks** section. This task provides a centralized workflow for managing the implementation of a single company file for **834 EDI**, **Data Exchange**, and **Proprietary** file types. It standardizes the implementation process while improving visibility and accountability by tracking progress from documentation and testing through production deployment.

During the implementation process, users can either select an existing carrier or add a new carrier. If a new carrier is added, additional information—such as the renewal month, carrier contacts, and other carrier-specific details—should be completed on the **Carrier Detail** page after the carrier has been created.

As users complete each phase of the implementation, they update the task to reflect their progress, from gathering the required documentation and completing testing to promoting the file to production. Throughout the process, users can add comments, record supplemental information, and upload supporting documents, ensuring all implementation activities and related documentation remain organized in a single location.

Enrollment Firm Fields Added

Additional fields have been added to **Company Renewals** for agencies that also serve as enrollment firms. These optional fields are available on the **Client Information** page and allow users to capture enrollment-specific preferences during the renewal process.

The new fields include:

- **Call Center** – A simple **Yes/No** option that indicates whether the organization is requesting call center support for the enrollment.
- **Communication Options** – Allows the user to specify how employee communications should be delivered via **text message**, **email**, or **both**.
- **Census Add File** – Allows the user to upload the census file that will be used for the selected communication option(s). This field is only available when a communication option has been selected.

The **General Agent** can configure the corresponding employee communication language within the **GA Setup Demo Environment** based on the communication option selected. The organization can then review and approve the communication content before it is used.

These new fields allow agencies to capture enrollment preferences early in the renewal process, reducing the need for follow-up communication and ensuring enrollment requirements are documented in one place. By identifying call center needs and preferred communication methods upfront, agencies can better prepare for enrollment, configure employee messaging more efficiently, and ensure organizations review and approve communication content before it is distributed.

Ben Ops and Data

Chart Dashboards

To provide greater visibility into your agency or organization's data and workload, Streamline now includes interactive charts throughout the application. These visual dashboards allow users to quickly identify trends, monitor progress, and gain meaningful insights into their book of business. By presenting key metrics in an easy-to-understand format, charts help users prioritize work, identify bottlenecks, and make more informed business decisions without having to manually analyze report data.

Charts are available for most report tables throughout Streamline. Each chart provides a visual summary of the data displayed in its corresponding report and supports interactive filtering. Selecting any section of a chart automatically filters the associated report table, allowing users to immediately view the underlying records. The filtered results can then be further refined or exported as needed.

At the Agency and Organization level, a new **Open Tasks** menu item has been added to provide a consolidated view of work across the agency or organization. This dashboard displays tasks by task type and status, while Renewals and Implementations are broken down by their current workflow step. Agency users also have the ability to filter agency level charts by Organization, making it easy to focus on a specific client.

The Agency level **All Tasks** report has also been enhanced and now includes two chart tabs:

- Tasks Created by Category – Displays the number of tasks, renewals, and implementations created over time, grouped by category. This chart can be filtered by Organization to analyze workload trends.
- Tasks Workload Dashboard – Provides a comprehensive view of task workload and can be filtered by Organization, User, and a range of creation dates. Users can choose to display only open tasks or include both open and completed tasks for historical analysis.

The remaining report areas throughout Streamline each include charts tailored to their specific purpose. For example:

- Audit Tasks display open audit tasks grouped by the associated audit comparison step.
- Renewals and Implementations display items grouped by their current workflow step.
- Eligibility Management and Support display tasks grouped by task type.

These interactive charts provide users with immediate visibility into operational activity while allowing them to seamlessly transition from high-level metrics to the detailed records behind the data.

User Task Dashboards and Notifications

To help users stay organized and improve visibility into their daily work, Streamline now includes a personal **Task Dashboard** and **Notifications** center. These new features provide a single location to quickly identify outstanding tasks, monitor progress across multiple processes, and review important system notifications without relying solely on email. By centralizing this information, users can more easily prioritize their workload, reduce the chance of missing important updates, and improve overall efficiency.

The **Task Dashboard** is divided into two sections: **My Open Items** and **Notifications**.

My Open Items

The **My Open Items** section displays all active tasks in which the user is involved, including tasks where the user is:

- The assignee
- The task creator
- A comparison verifier
- A designated contact

An indicator displays the total number of open items the user is involved in. The **Report** tab displays only active tasks and can be filtered or exported as needed. It also includes additional metrics to help users monitor workload and progress, including **Number of Days to Completion**, **Number of Days Since Open**, **Number of Days Since Last Updated**, and the **Last Updated By** user.

The **Dashboard** tab provides a visual summary of open work by task type and wizard, including multi-step processes such as **Renewals** and **Implementations**. Each chart breaks down the number of items by step or status. Selecting a chart segment automatically filters the **Report** tab to display the corresponding records, making it easy to drill down into specific work items.

Notifications

The **Notifications** section, identified by the **bell** icon, provides a centralized history of task and wizard notifications.

Whenever a system-generated email is sent for a task or wizard and the user is included as an assignee or designated contact, a notification is automatically recorded. A red indicator appears on the bell icon whenever new notifications are available.

Each notification includes:

- Task Category
- Task or Wizard Name
- Notification Message
- Current Status
- Notification Date
- Date Read
- Organization
- Company

Notifications are automatically marked as **Read** when the Notifications page is opened. To keep the list manageable, the Notifications page displays the 100 most recent notifications.

This feature provides an easy way to review important system notifications, even if an email was missed or deleted, ensuring users have a complete history of communications related to their assigned work.

Updated Report Options

To make it easier to locate and analyze data, Streamline's report functionality has been enhanced with additional filtering and navigation capabilities.

Report tables now support **multiple filter criteria**, allowing users to refine results using several filters at the same time for more targeted reporting. In addition, report tables now feature **continuous scrolling**, eliminating the need to navigate between pages. This provides a smoother browsing experience and makes it easier to review large data sets while maintaining the ability to filter and export results as needed.

Cross-Agency User Assignment Update

To improve security and ensure accurate task ownership, Streamline has been updated to restrict task and wizard assignments when an organization is connected to multiple agencies.

Users can now assign tasks and wizards only to users within their own agency. This enhancement helps prevent cross-agency assignments, ensures work is routed to the appropriate team, and provides clearer accountability throughout the task and wizard lifecycle.

Additional Benefit Administration System

We are excited to announce that a new Benefit Administration System, **Dayforce**, has been added to the list of supported systems within Streamline. This enhancement provides additional flexibility for agencies and organizations managing benefits administration processes through the platform.

Fixes

Ben Ops Solution Area

Company Plan Renewal Comments

We have corrected an issue in the **Company Renewal Wizard** that prevented users from adding comments to the **Client Information** step after the **Plans Checklist** had been completed but before it had been approved and closed.

Users can now continue to add comments during this stage of the renewal process, ensuring important information can be documented and communicated until the step is finalized by both the organization and general agent contact.

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

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

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