Agency User Guide

STREAMLINE

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DATA MANAGEMENT SOLUTIONS

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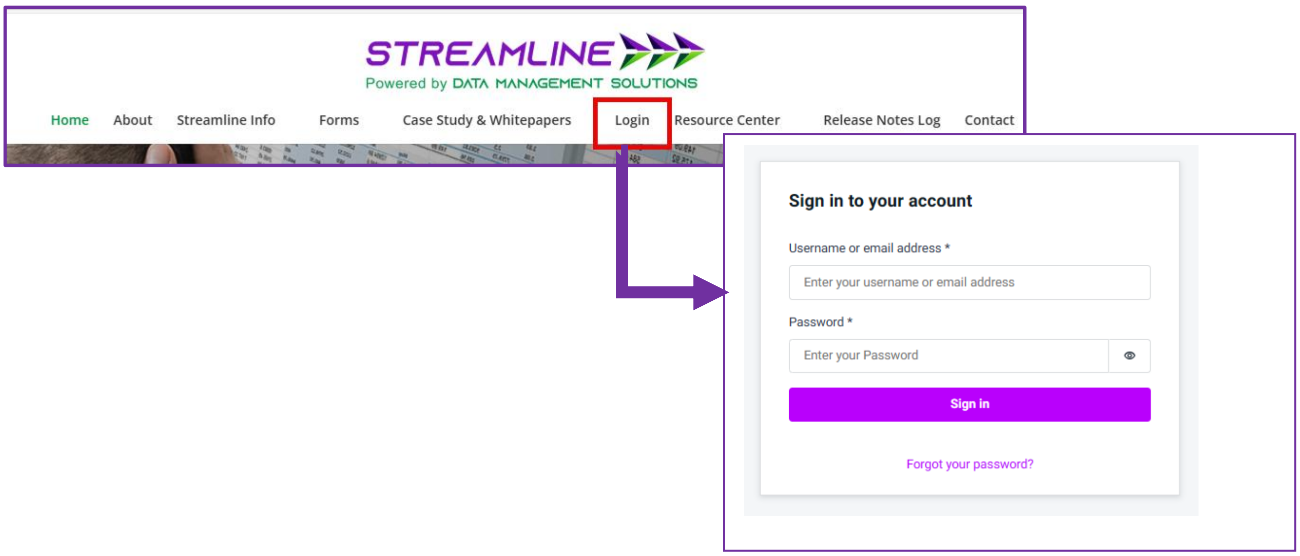
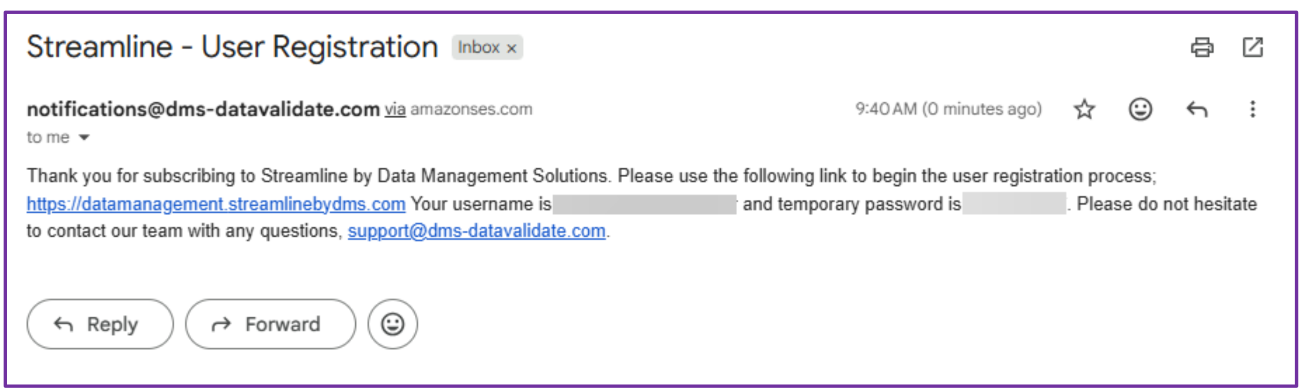
Login

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



Registration Email Example:



Users

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

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

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

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

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

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

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

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

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

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

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

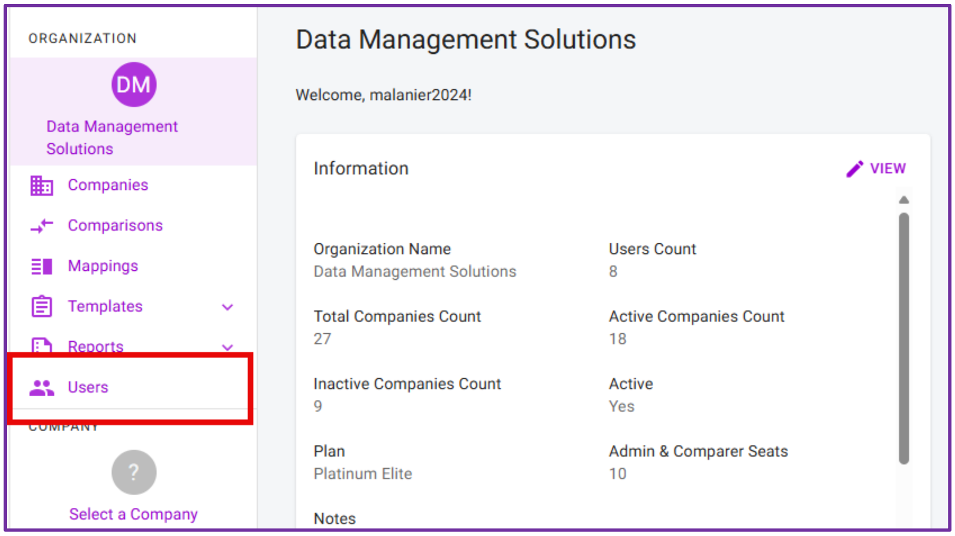
8. **Company-Level Verifier – Partial Access**
   Allows verification of discrepancies and missing data for existing compares within a single company. This role does not include compare and merge functionality.

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

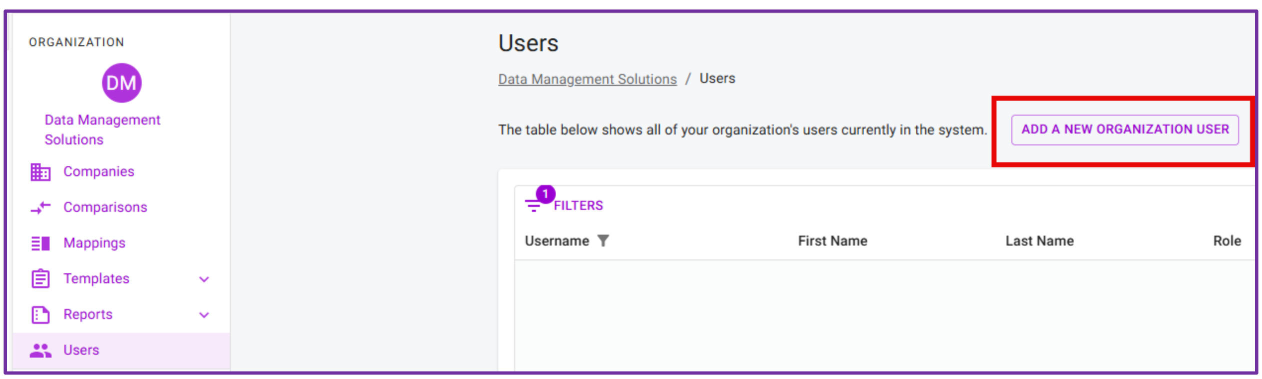
Only Agency level users are discussed in this set of instructions. Please reference the Organization and Company Level User process documents for information pertaining to those levels.

Adding an Organization Admin user

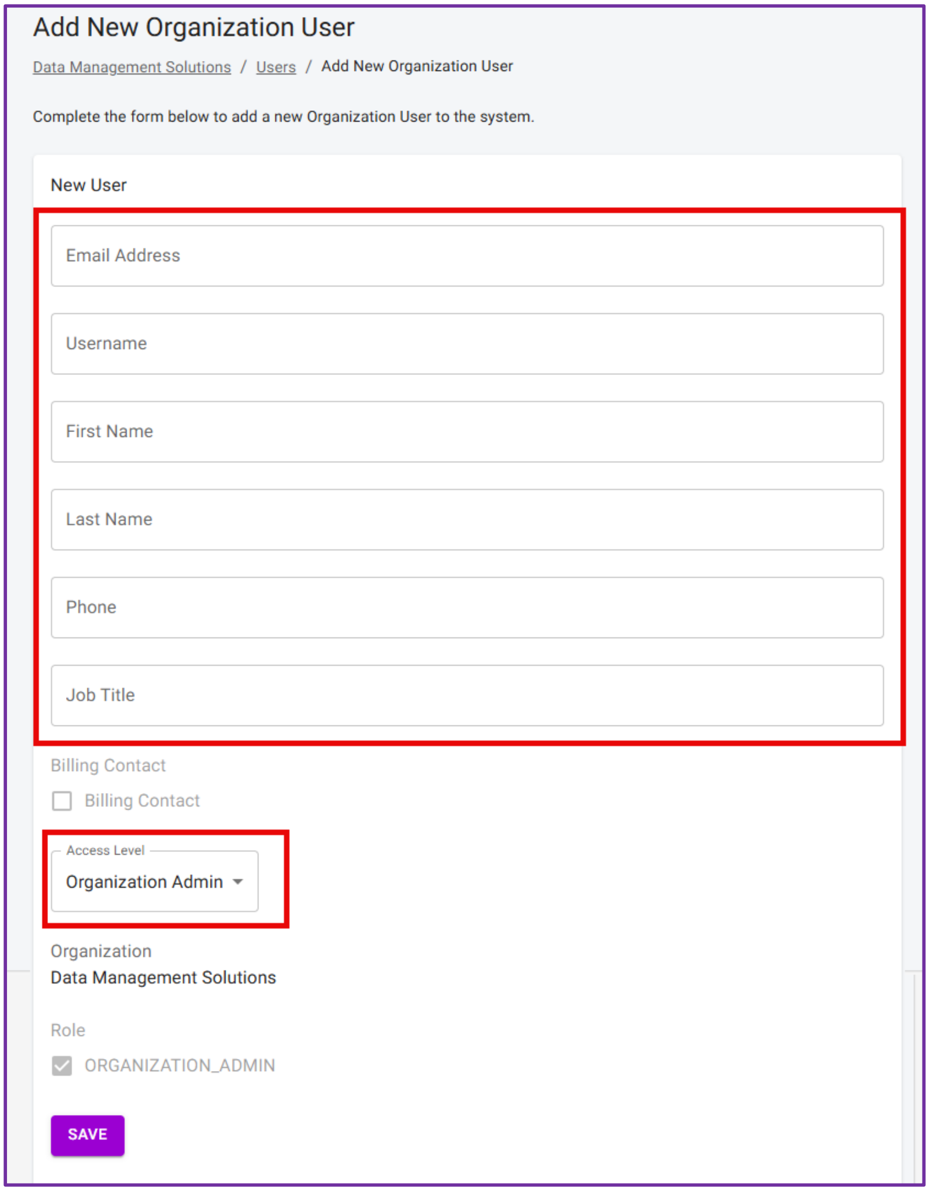
Select USERS under the desired organization.



Select ADD A NEW ORGANIZATION USER.



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



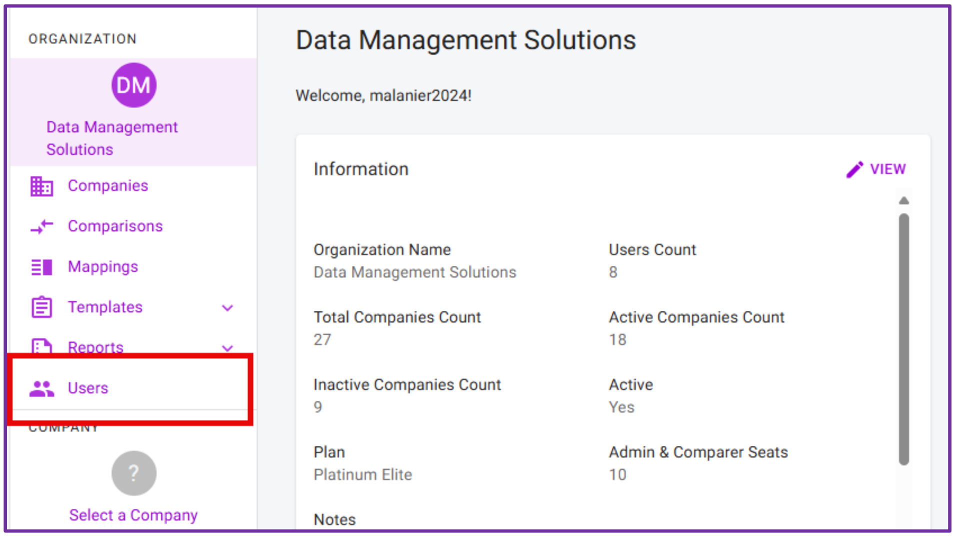
In the Access Level dropdown, select the user type: Organization Admin. This access level has full site functionality including adding and inactivating users.

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

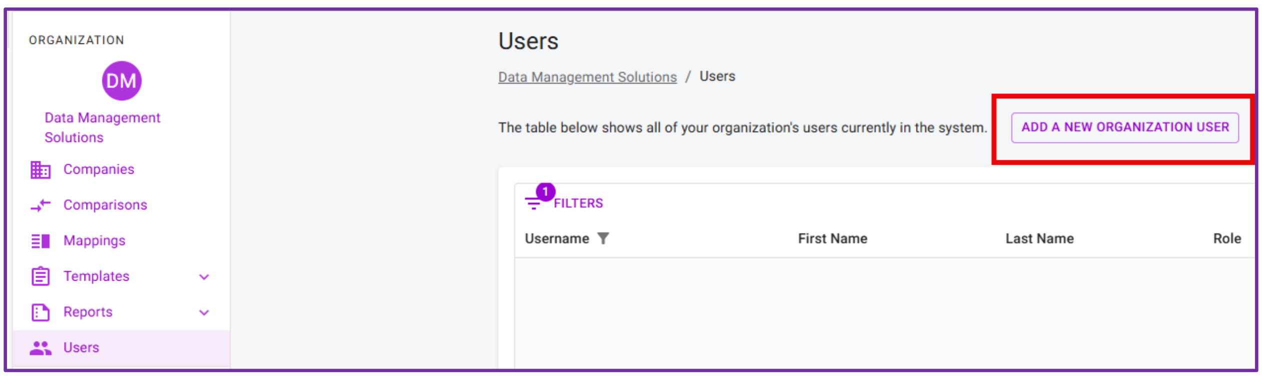
The user will then receive an auto-generated email with a temporary password and a link to register their account.

Adding an Organization Comparer user

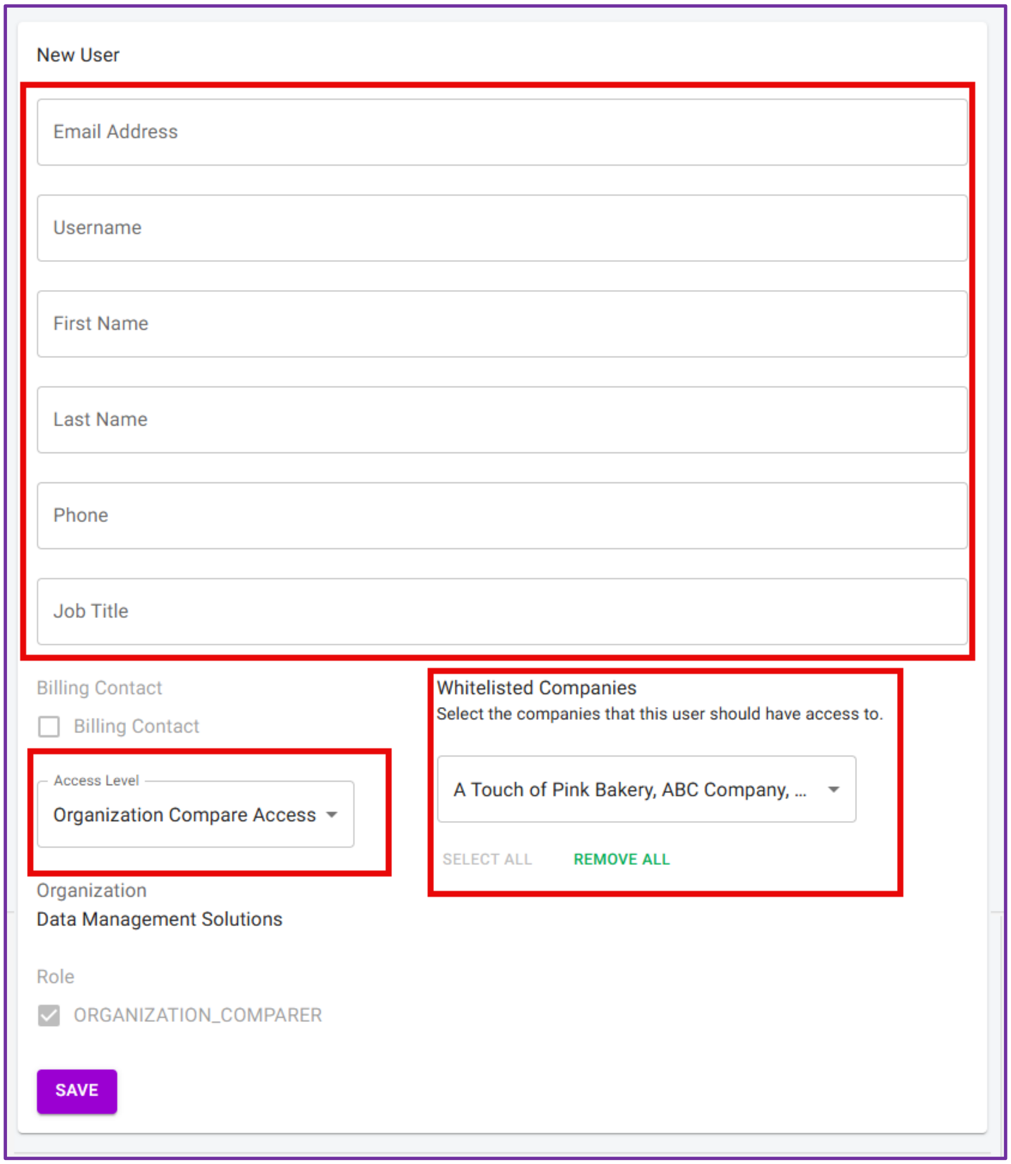
Select USERS under the desired organization.



Select ADD A NEW ORGANIZATION USER.

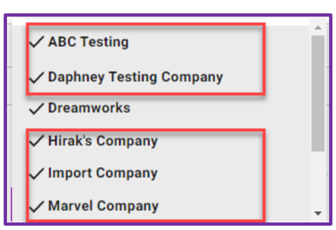


Enter all applicable information (Email, Username, First Name, Last Name, Phone, Job Title) for the newly created user. Please note that the email address and username CAN NOT be changed once saved.



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

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

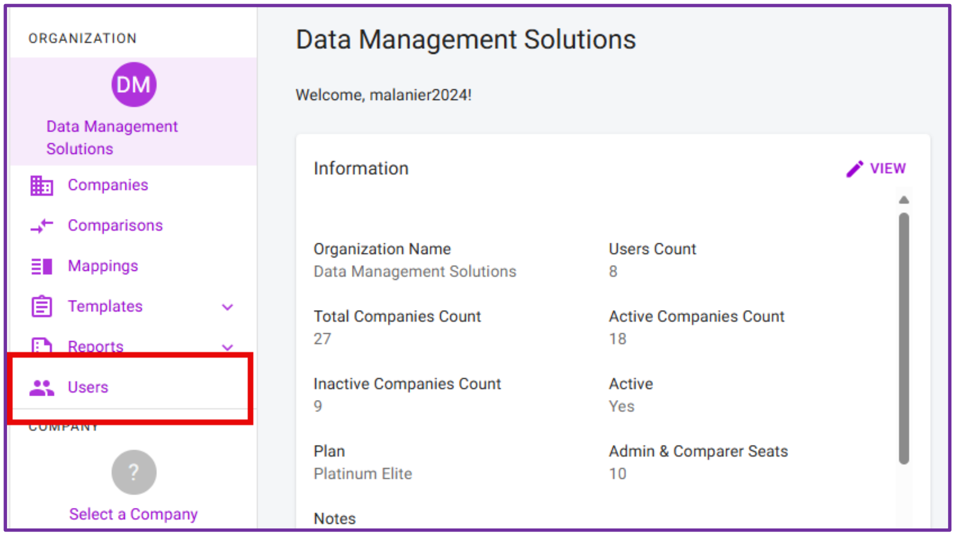


Once all applicable information has been entered and whitelisted companies selected/deselected, click Save.

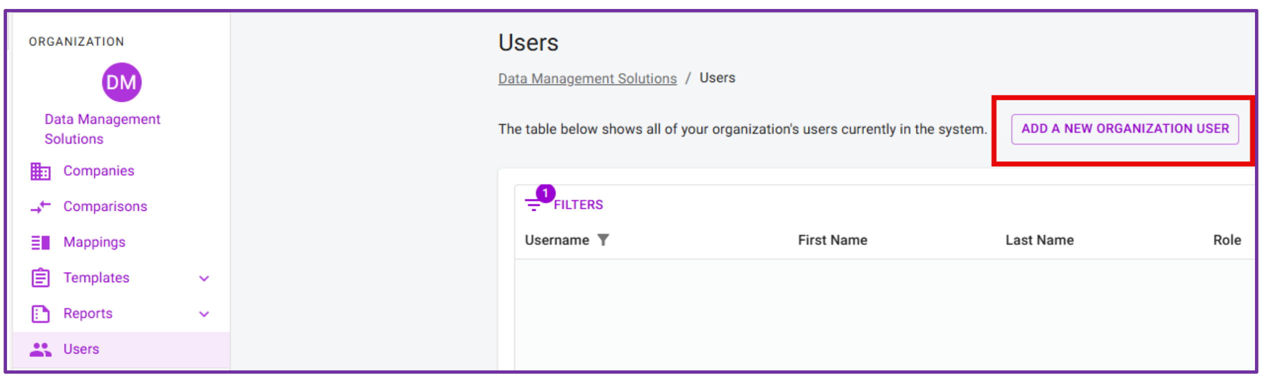
The user will then receive an auto-generated email with a temporary password and a link to register their account.

Adding an Organization Task Manager user

Select USERS under the desired organization.

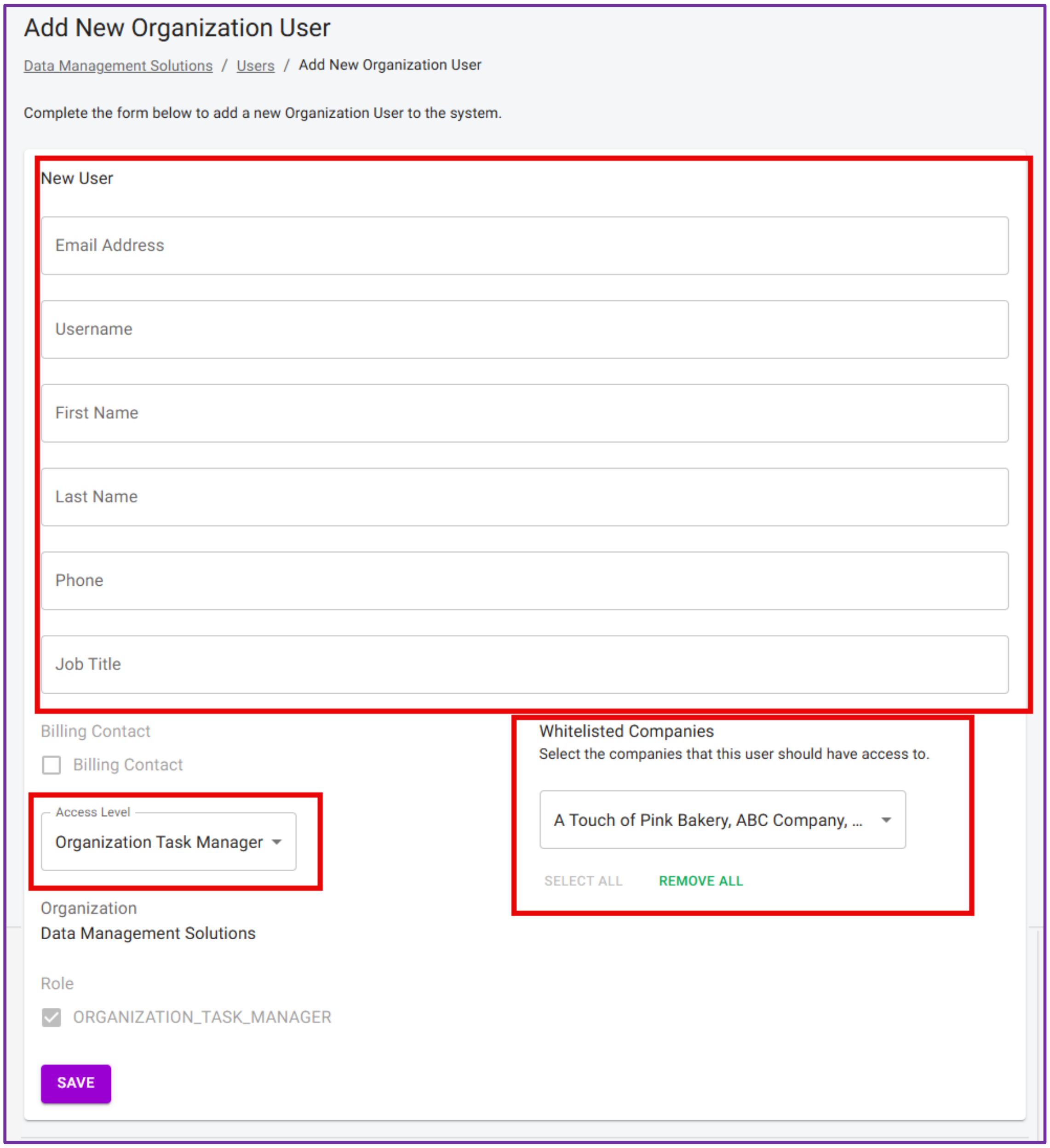


Select ADD A NEW ORGANIZATION USER.



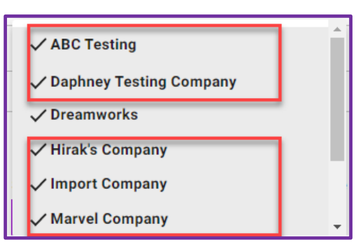
Enter all applicable information (Email, Username, First Name, Last Name, Phone, Job Title) for the newly created user.

Please note that the email address and username CAN NOT be changed once saved.



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

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



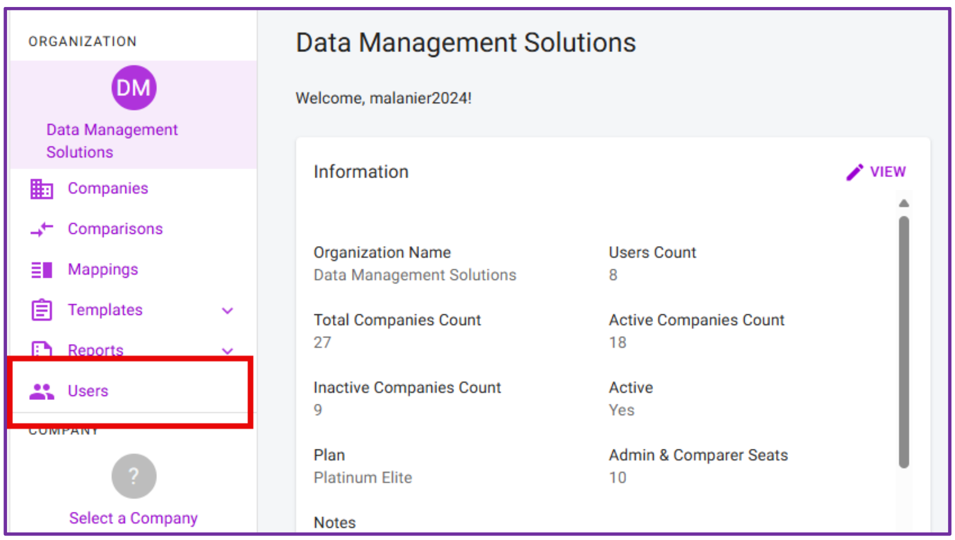
Once all applicable information has been entered and whitelisted companies selected/deselected, click Save.

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

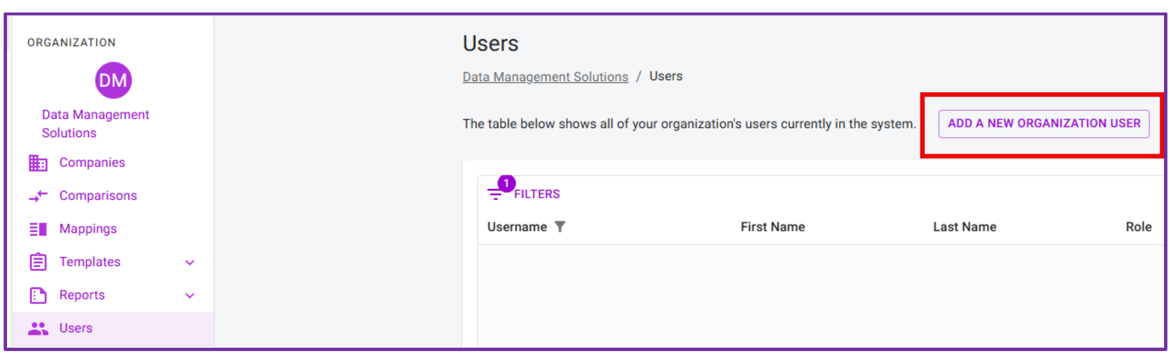
Note: This user type does not count against your licensed user seats. You may create an unlimited number of Task Managers.

Adding an Organization Verifier user

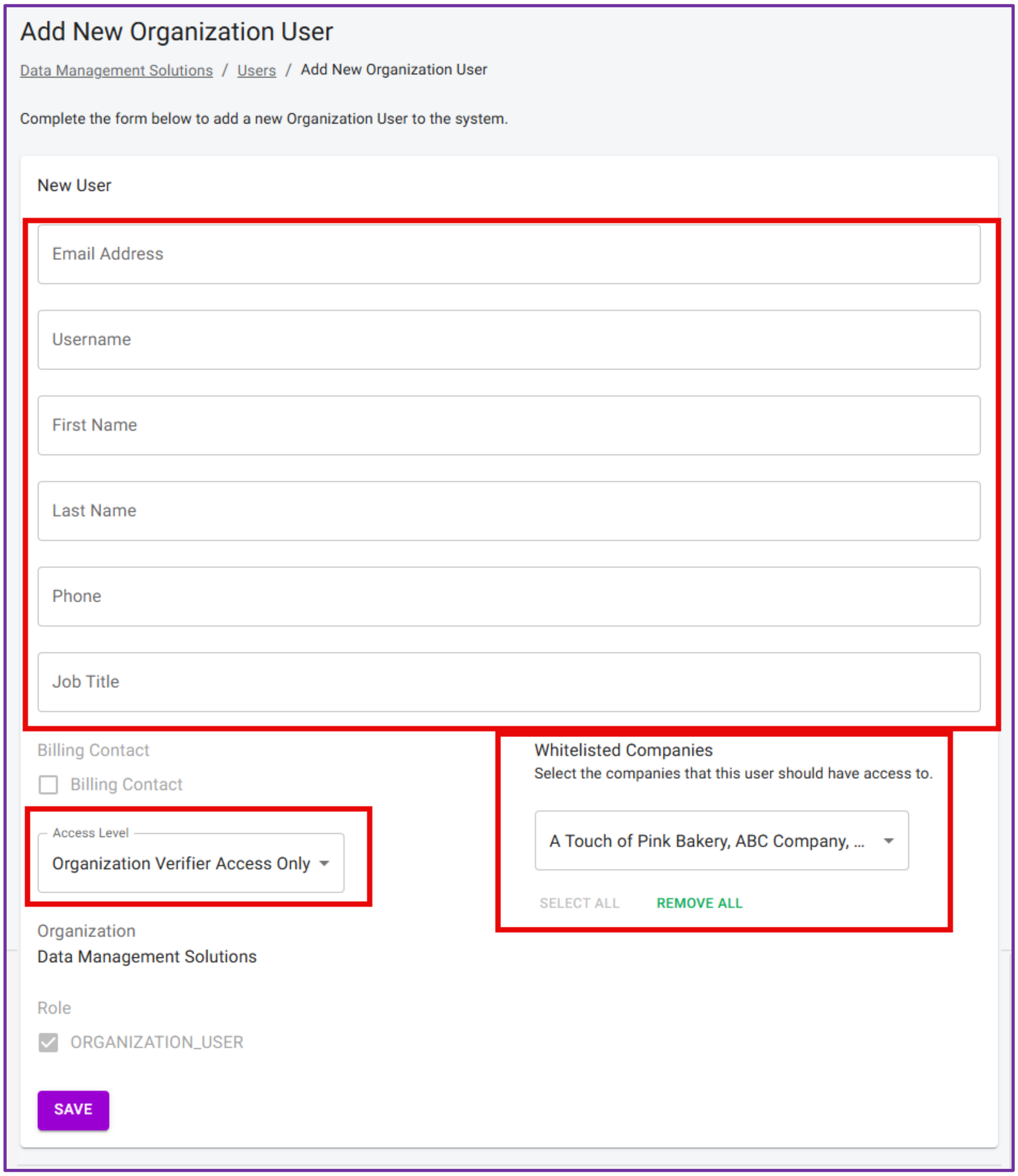
Select USERS under the desired organization.



Select ADD A NEW ORGANIZATION USER.

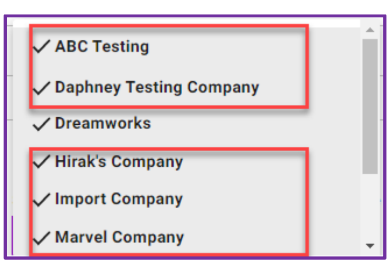


Enter all applicable information for the newly created user and check the VERIFIER ACCESS ONLY box.



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

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



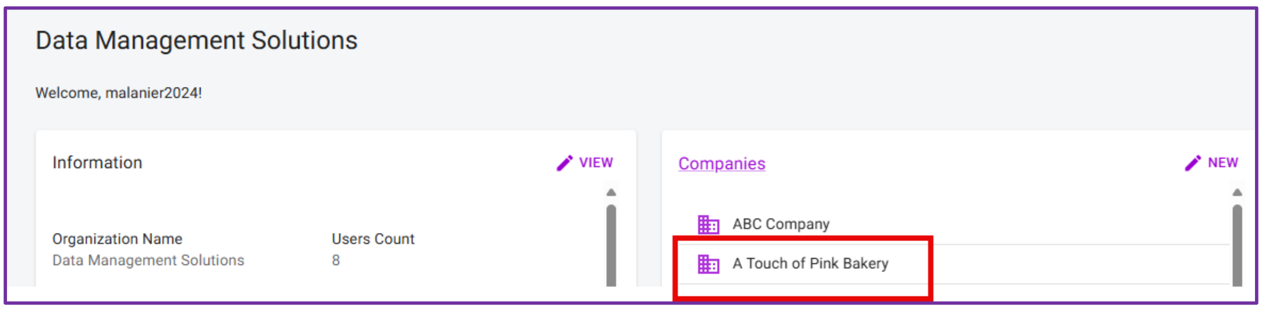
Once all applicable information has been entered and whitelisted companies selected/deselected, click Save.

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

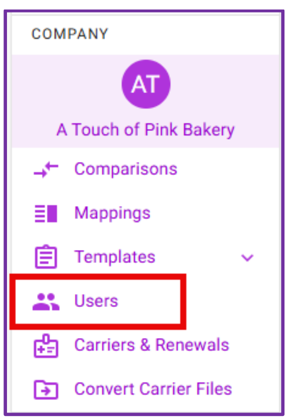
Note: This user type does not count against your licensed user seats. You may create an unlimited number of Organization Verifiers.

Adding a Company Admin user

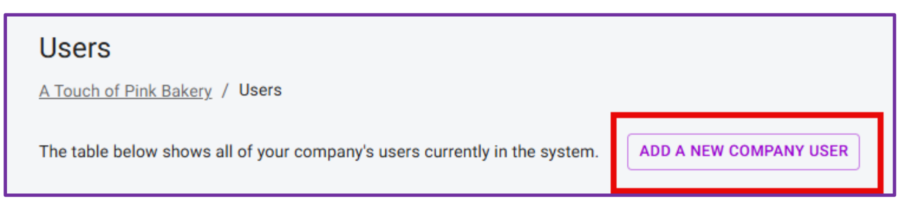
Select the Company where the new user will be added.



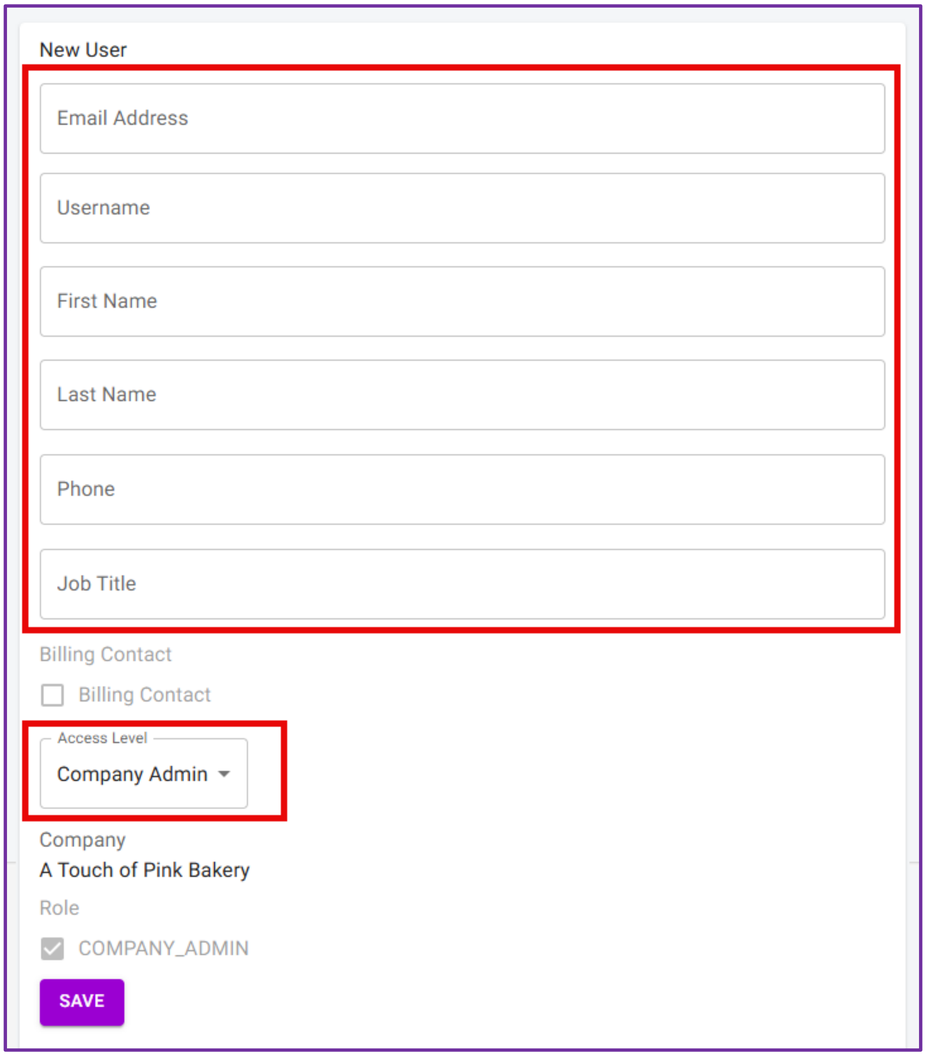
Click USERS under the desired company.



Click ADD A NEW COMPANY USER.



Enter all applicable information for the newly created user.



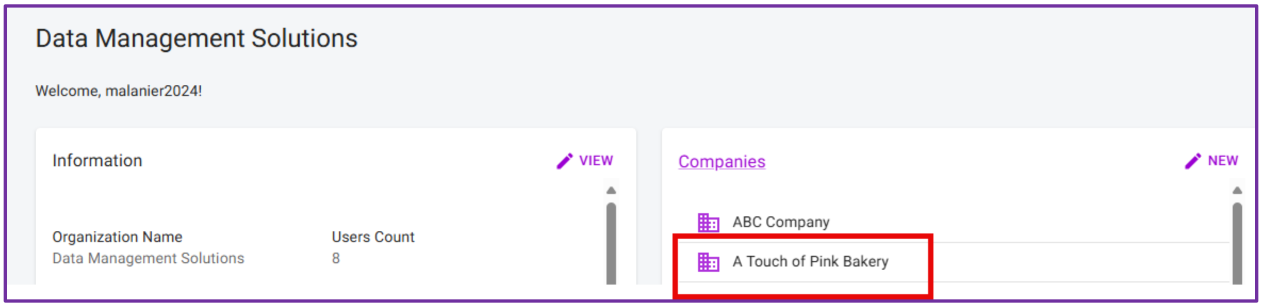
In the Access Level dropdown, select the user type: Company Admin. This access level has full compare and merge functionality for the specific company that the user was created under.

Once all applicable information has been entered click Save.

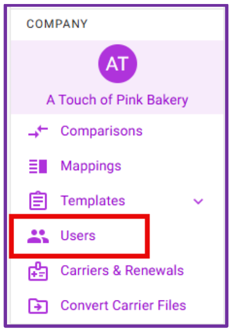
The user will then receive an auto-generated email with a temporary password and a link to register their account.

Adding a Company Verifier user

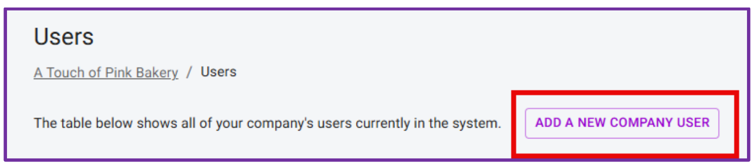
Select the Company where the new user will be added.



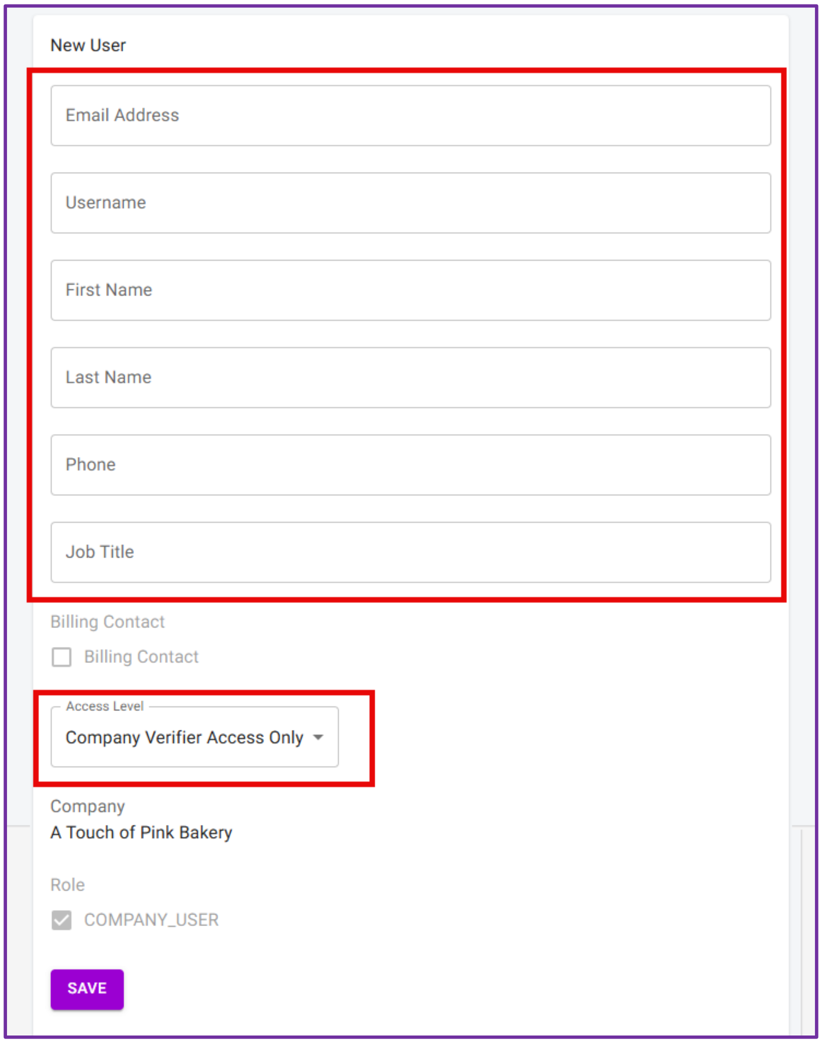
Click USERS under the desired company.



Click ADD A NEW COMPANY USER.



Enter all applicable information for the newly created user.



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

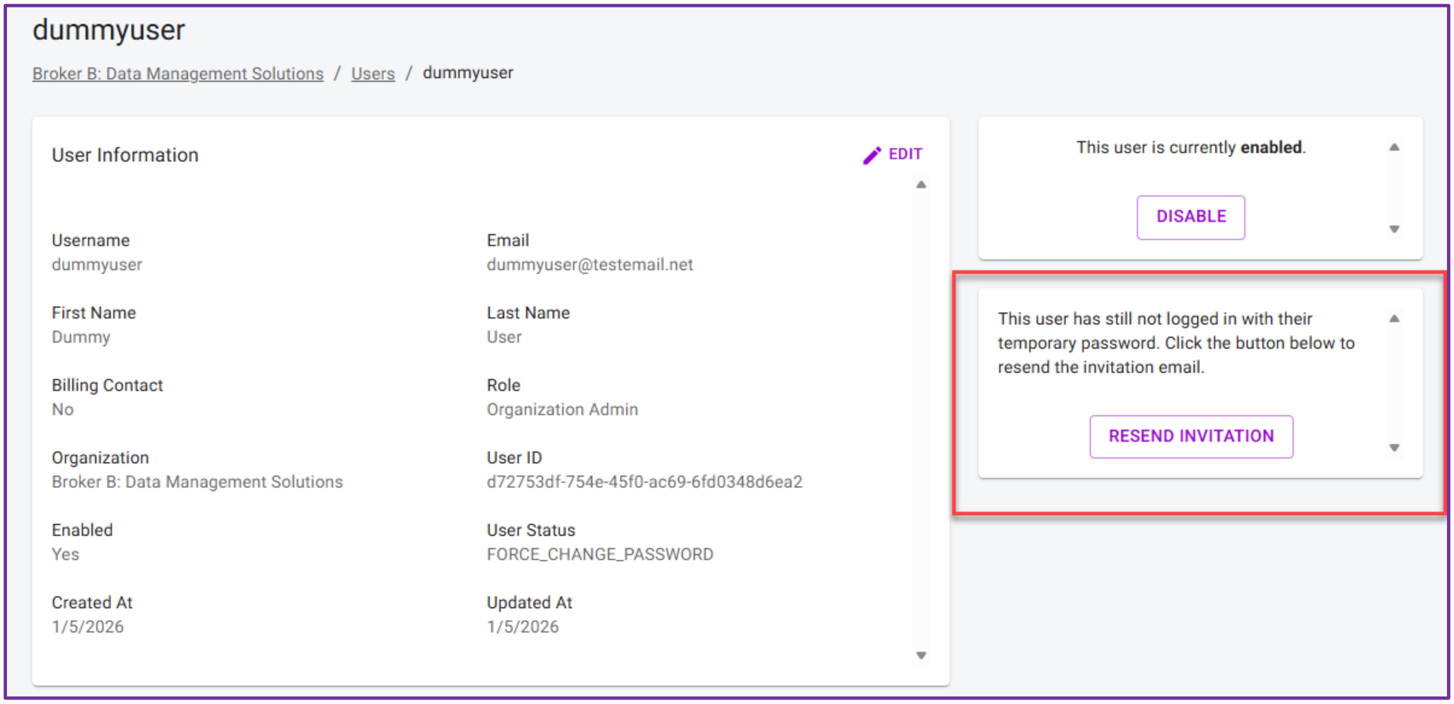
The user will then receive an auto-generated email with a temporary password and a link to register their account.

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

Resend User Registration

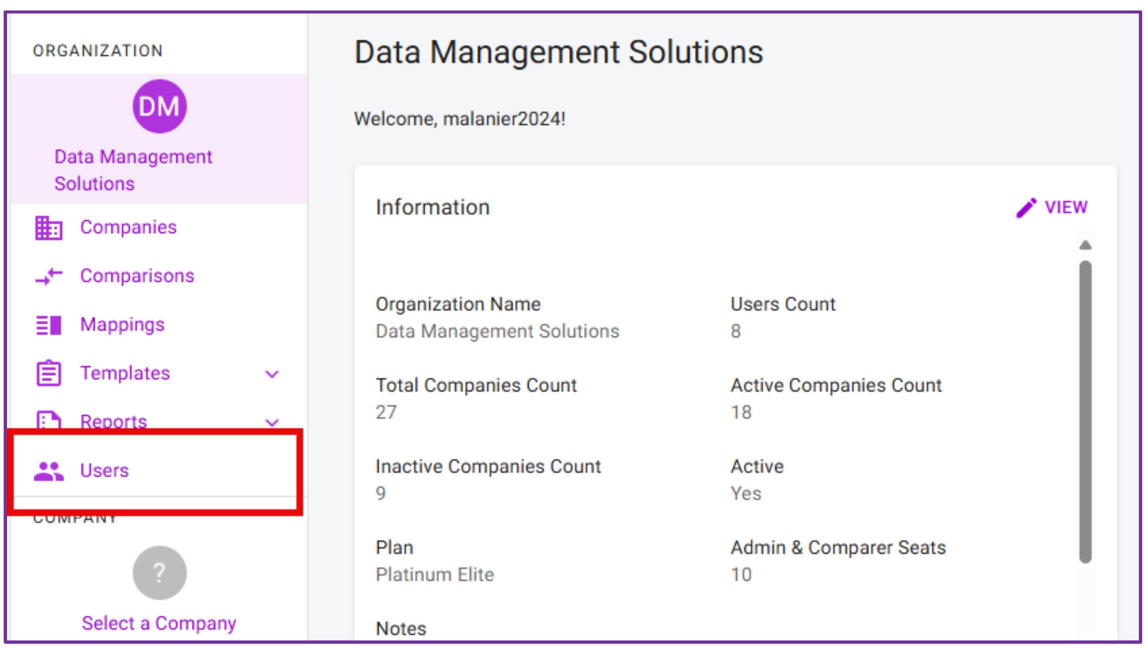
To resend a user registration invitation, locate the user in **Streamline** and click their username to open the **Edit User** screen. Then, click **Resend Invitation**.

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

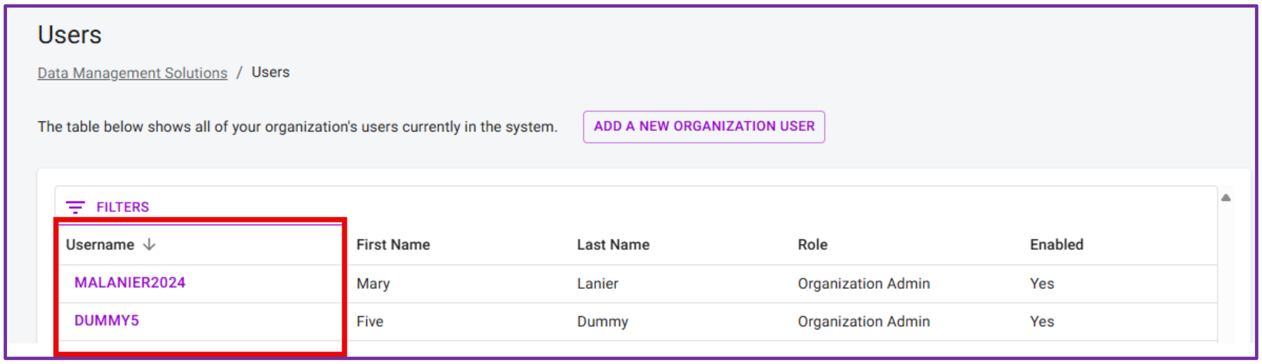


Inactivating / Reactivating a User

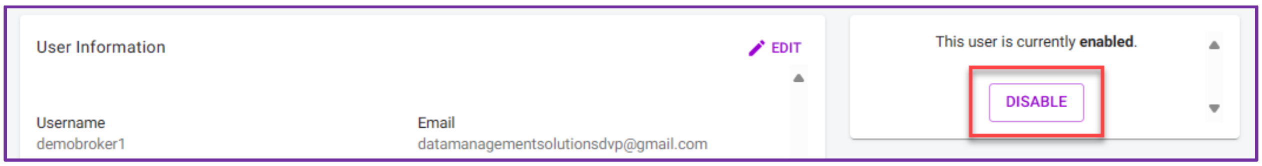
Select USERS under the organization.



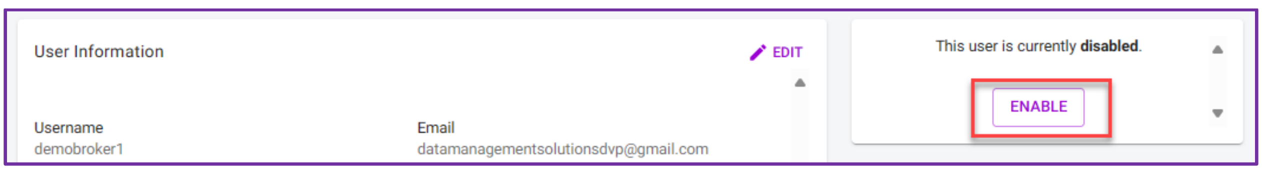
Select User to inactivate.



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



To reverse the inactivation, click ENABLE.



Comparisons

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

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

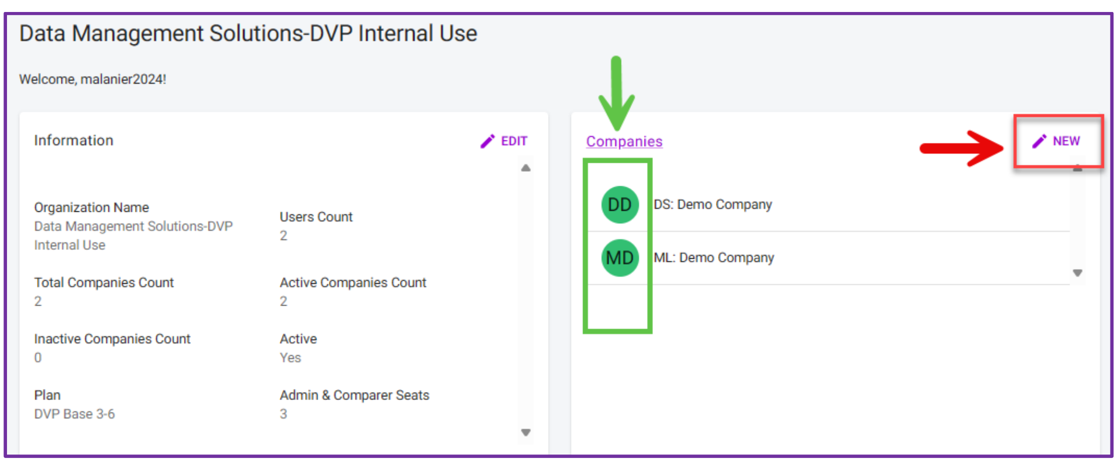
Note: The **Comparison** table export includes additional fields that are not displayed in the on-screen table but are available in the downloaded file.

Create the **Compare Only**

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

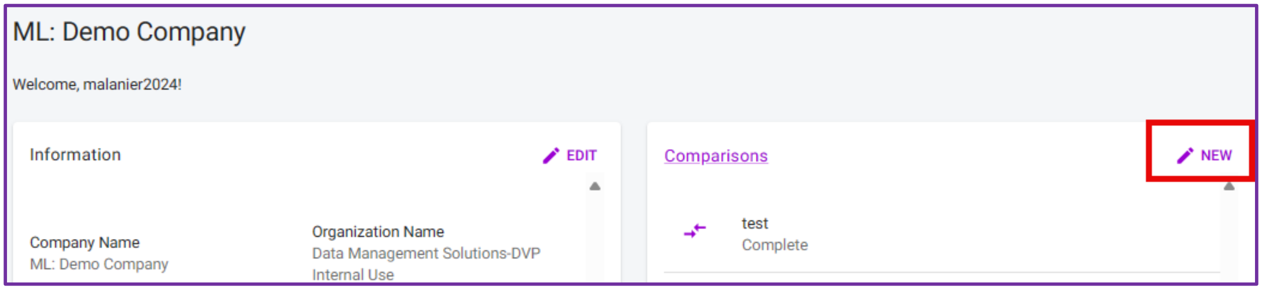
Select the Company

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



Create New Compare

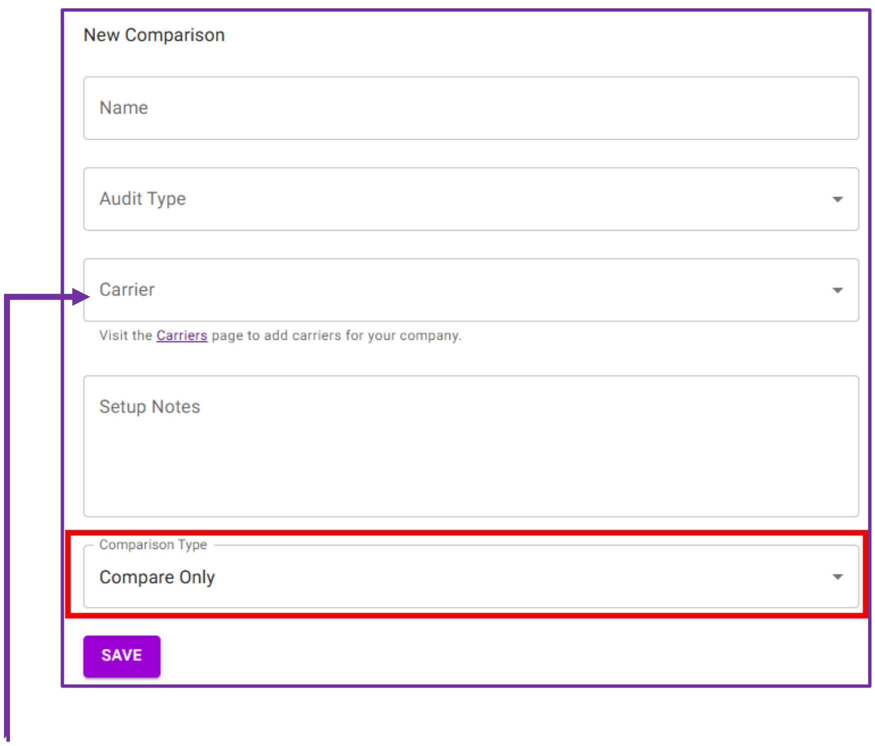
Select NEW to begin a new comparison



Name the Compare

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

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



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

Import Files

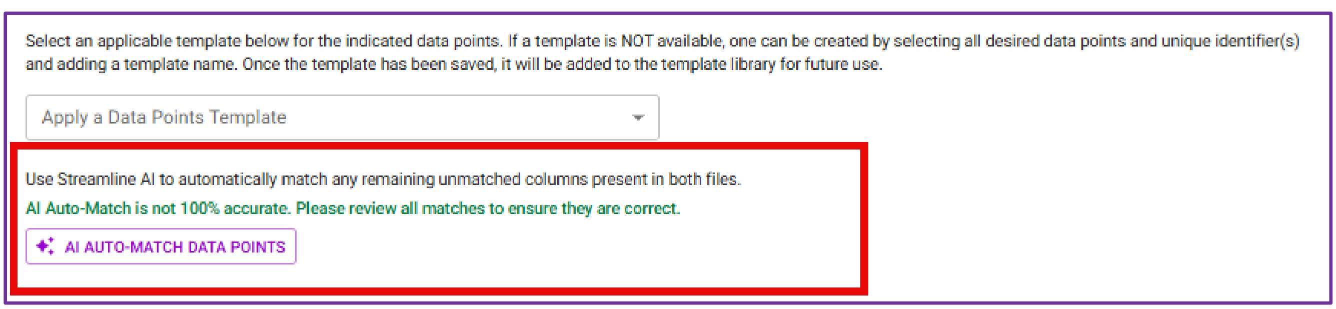
Import baseline and secondary files, select specific worksheets (if applicable), then click SAVE. If you use same file for both baseline and secondary, click USE BASELINE FILE. Rename file names using 31 characters or less, if desired.

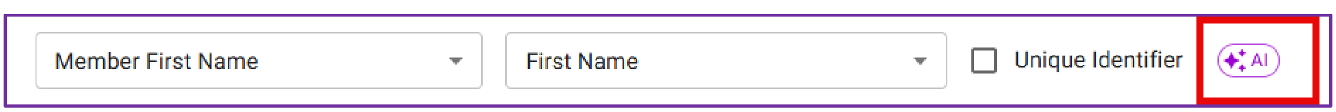
Select Data Points & Create Import Template

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

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

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





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

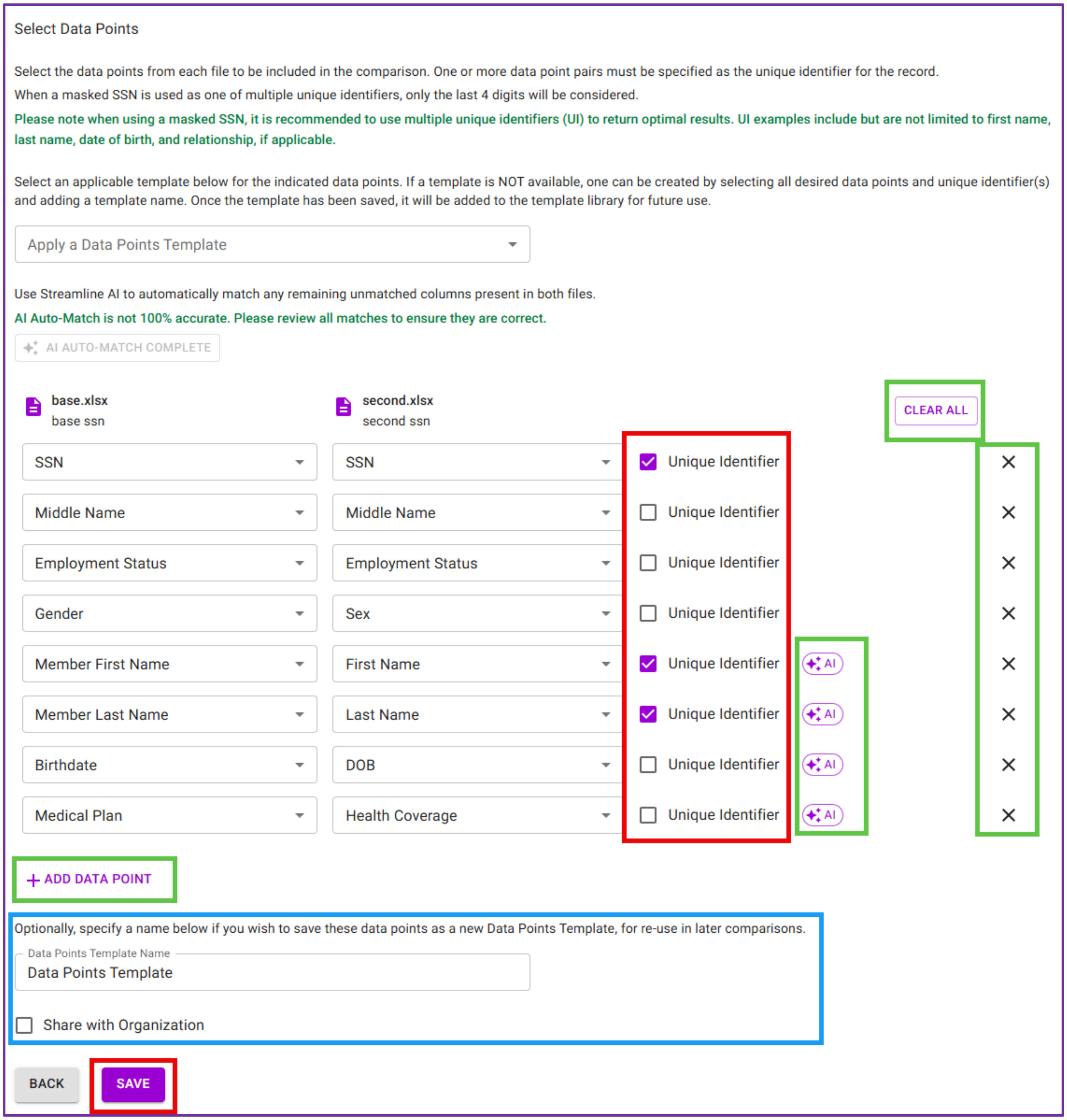
At least **one (1) unique identifier** must be selected. To remove all data points, click **CLEAR ALL**.

If a masked SSN is used as one of multiple unique identifiers, only the **last four digits** will be considered.
Note: When using a masked SSN, it is strongly recommended to include additional unique identifiers (UIs) such as first name, last name, date of birth, or relationship (if applicable) to ensure the most accurate results.

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

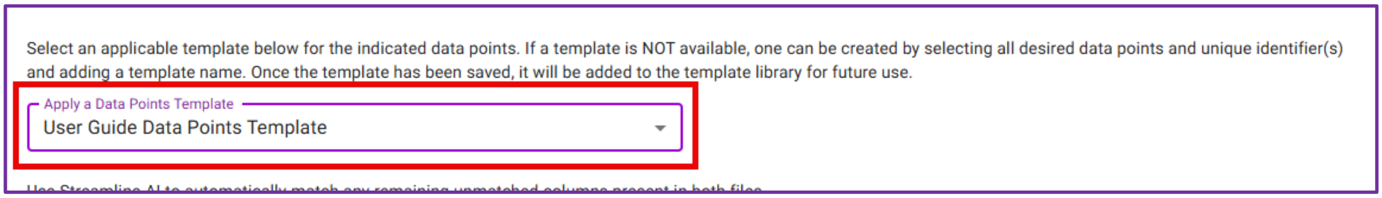
Company Admins (available under the Platinum Elite subscription) will only have access to templates created within their specific company.

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



Select Data Points & Reuse Existing Template

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

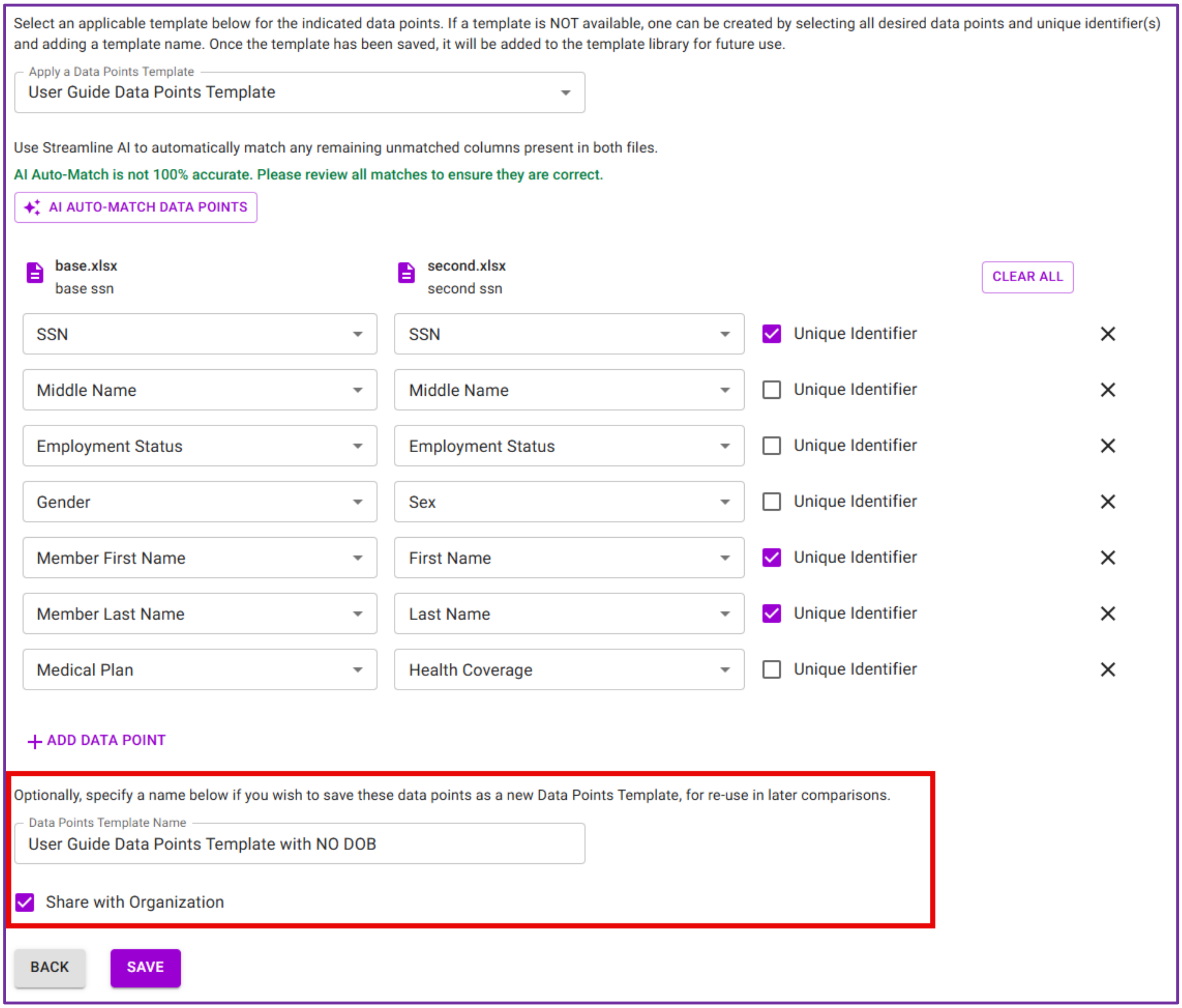


If no template is available, you can create one by selecting the desired data points and unique identifier(s), then entering a template name. Once saved, the template will be added to your library for future use and can optionally be shared with the organization for use across other companies.

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

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

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



Mapping

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

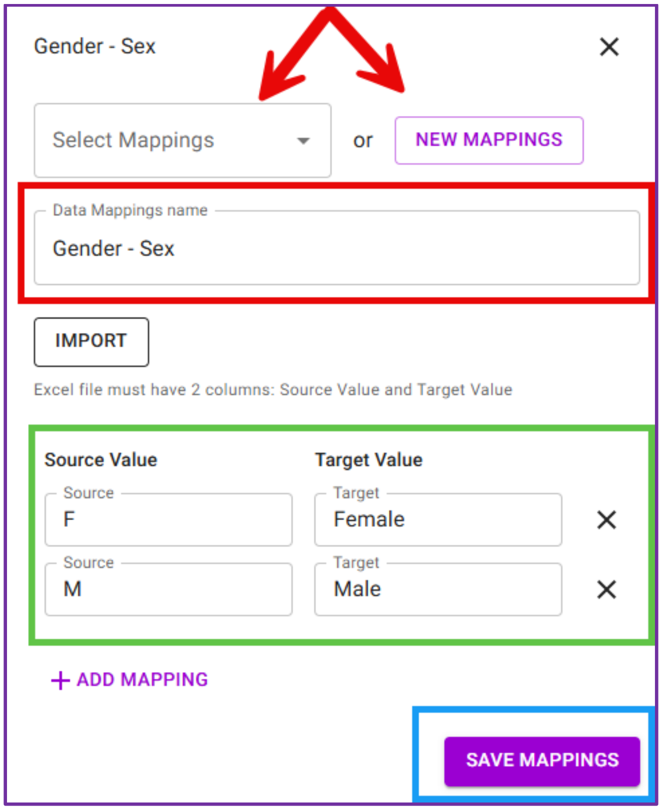
Mappings can be created several ways.

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

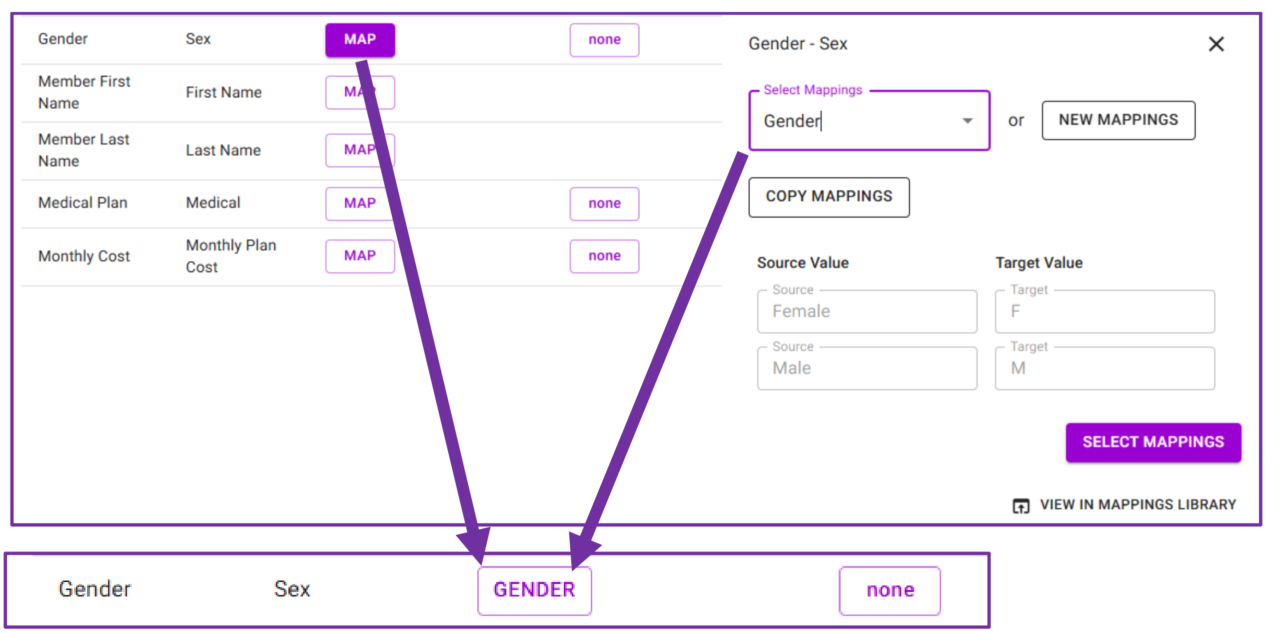
To Manually create a mapping:

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

Click SAVE MAPPINGS to newly created mapping to save.



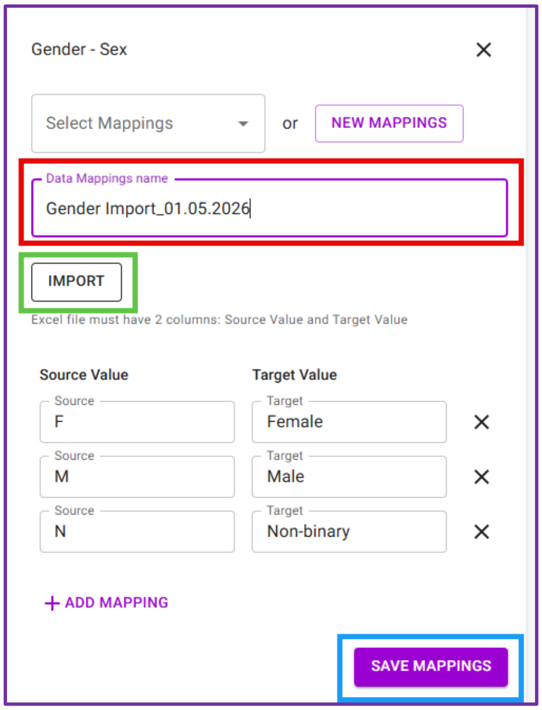
If you use existing mapping, click SELECT MAPPINGS.



To Import a mapping:

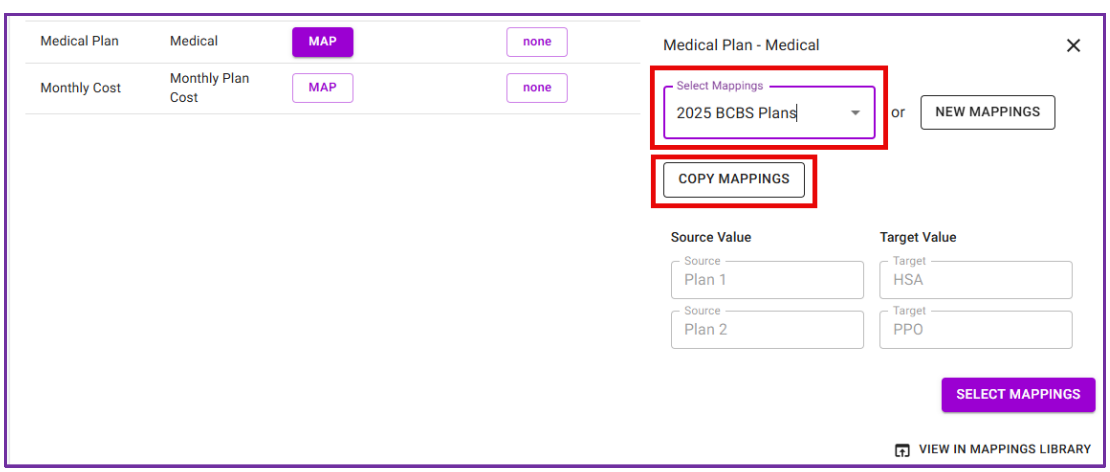
To add a new mapping, click **New Mappings**. Enter a mapping name, then select **Import**.
The import file may be a single-sheet Excel file or a CSV file. If you are using an Excel file with multiple sheets, the mapping **must** be on the first tab—otherwise, the import will fail.

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



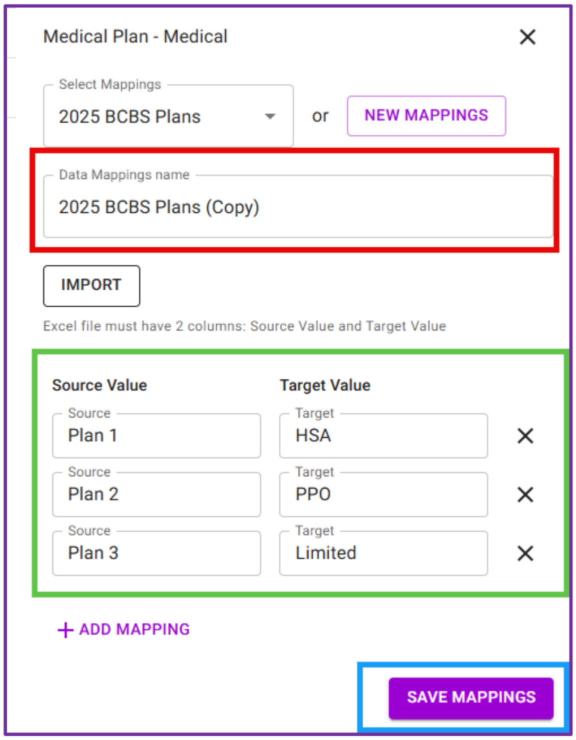
To Copy and modify an existing mapping:

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

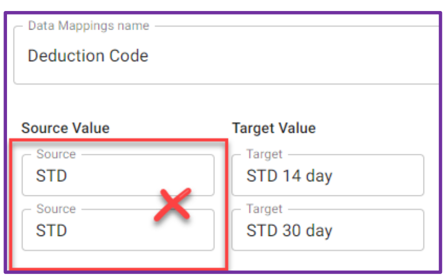


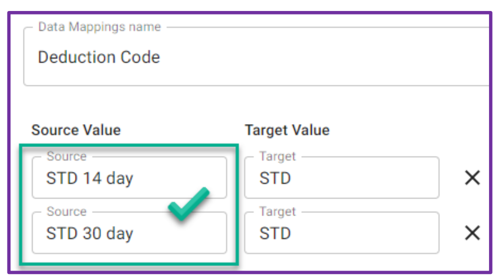
This creates a duplicate of the mapping with **(copy)** added to the name. You can then rename the mapping and add, update, or remove any source or target values as needed.

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



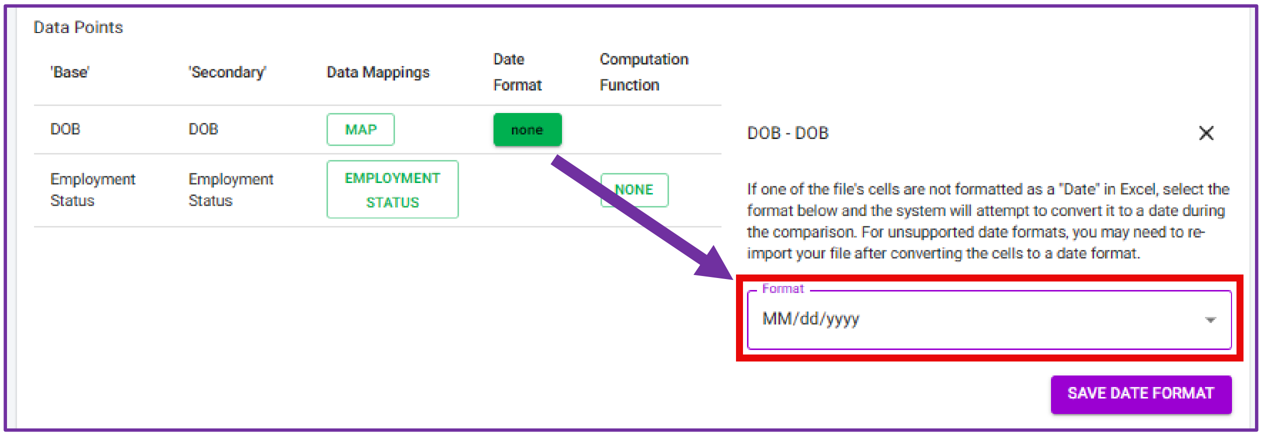
NOTE: The **SOURCE VALUE** in mapping must be unique. If the same value is used more than once under **SOURCE**, an error will occur. However, it is acceptable to use the same **TARGET VALUE** multiple times.





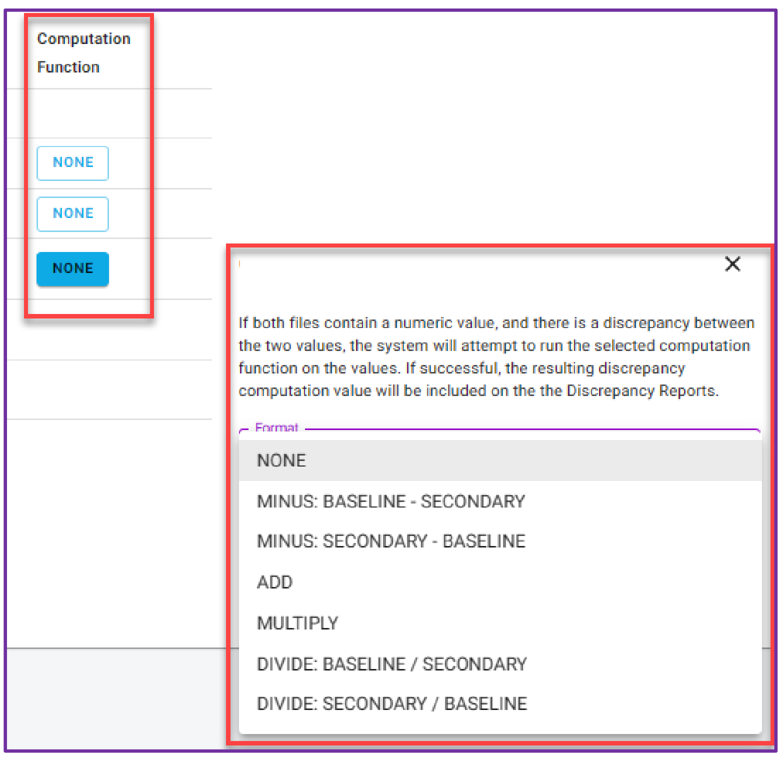
Mapping – Date Format

If the date is not formatted in the files as a date or a different formatting type, select the matching format to convert from text to date and then SAVE DATE FORMAT. If matching format is not available, the date must be corrected manually in the files and then re-imported. Click NEXT once the mapping is complete.

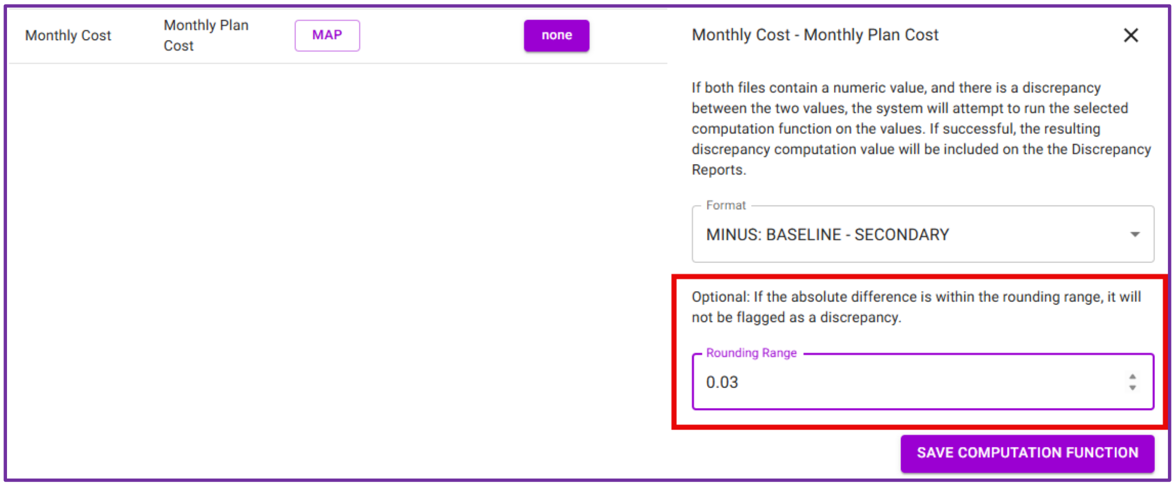


Mapping – Computation

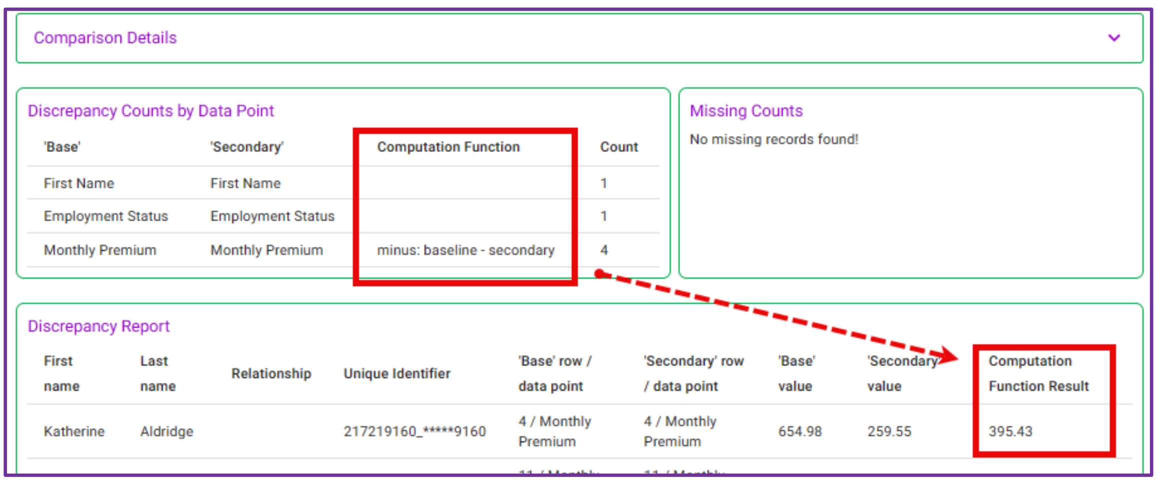
Add a computation (subtraction, addition, multiplication, division) to any numeric data point from the baseline file to any numeric data point in the secondary file. Add the computation by clicking the button under the Computation Function column for the desired data points and then selecting the function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



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



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

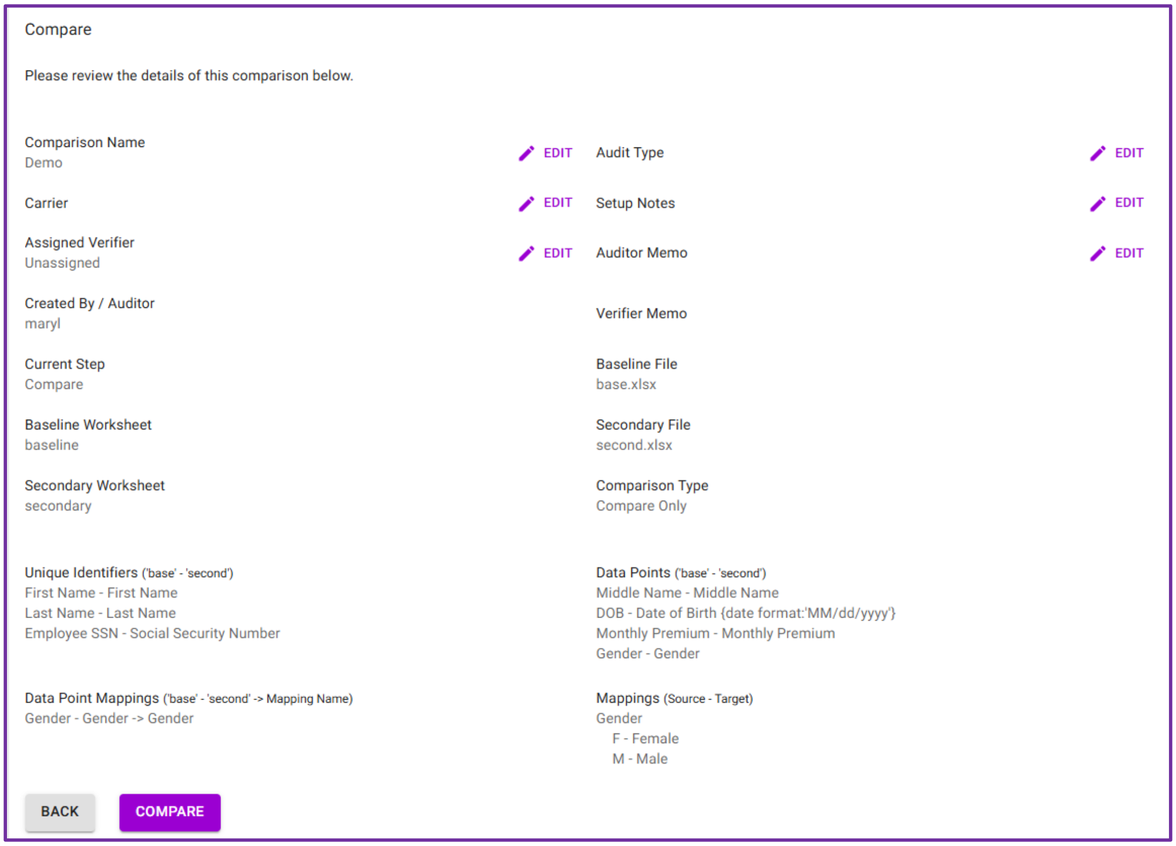


Note**:** This functionality applies **only to numeric fields**, and **only to data points that are *not* part of the unique identifier**.

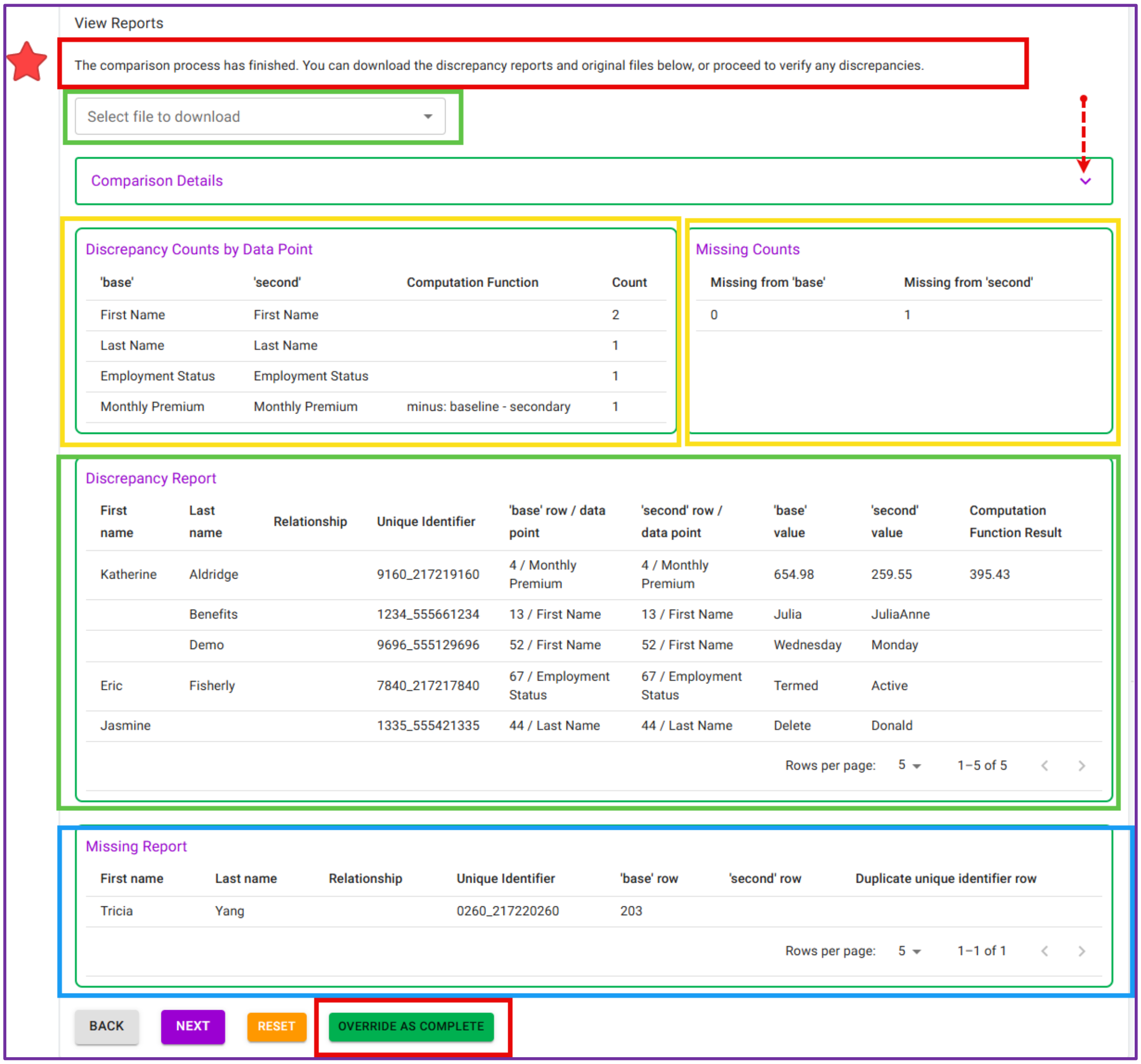
Only results from the **subtraction (minus)** function will proceed through the full compare process. All other functions will stop at **Step 5**.

Compare

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



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

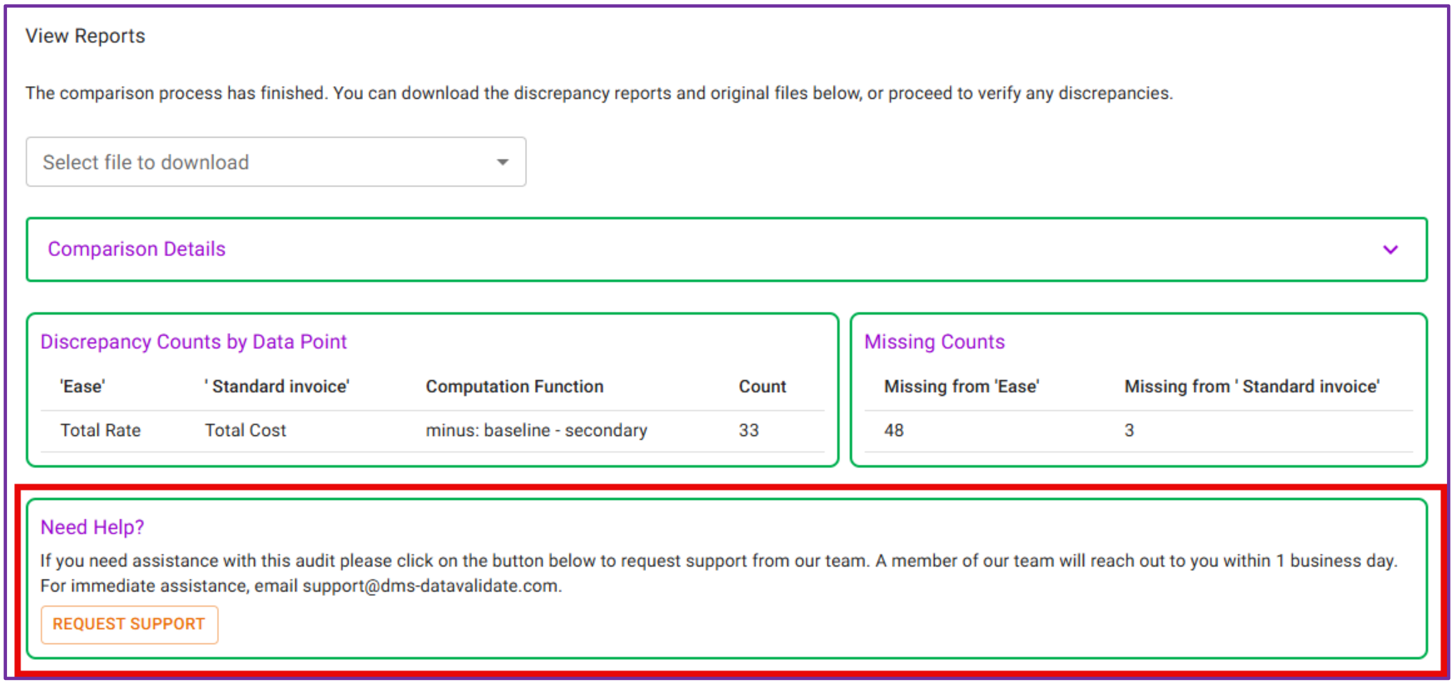


We've introduced a **Request Support** option on **Step 5 – Compare** for audits that return more than 30 discrepancies and/or missing items. This option appears only when that threshold is met.

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

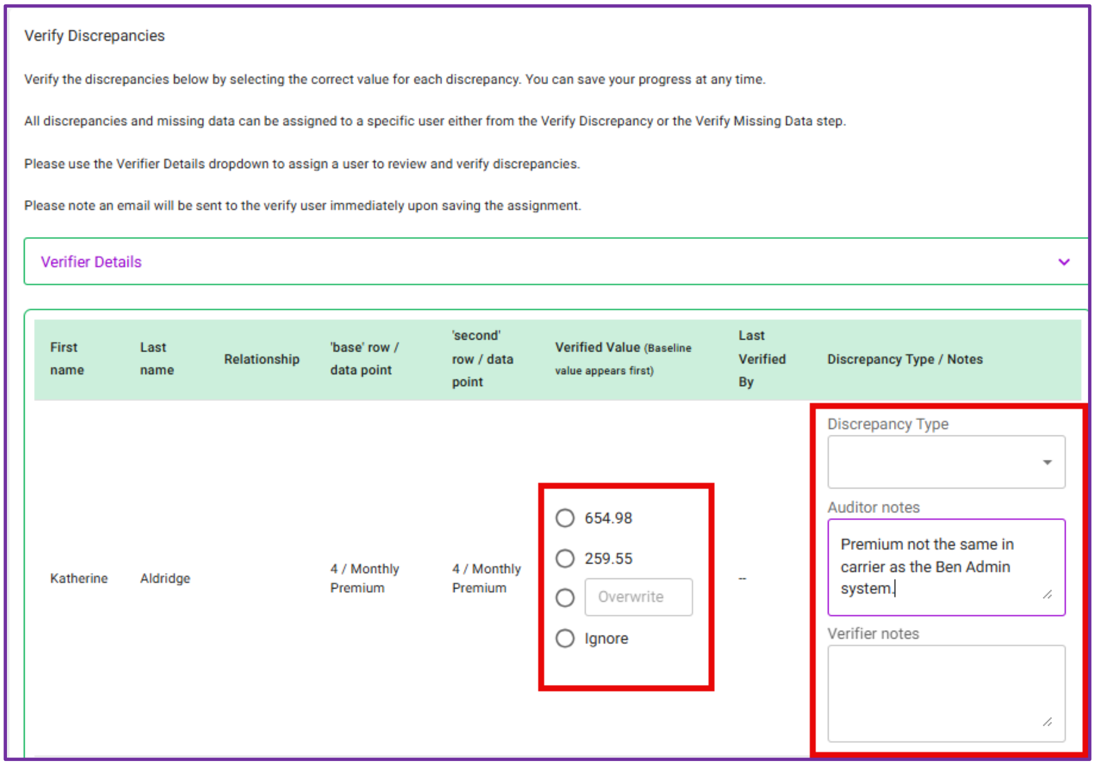
Please note that the **Streamline Support Team** is always available, regardless of audit results. If you need assistance at any time, you can contact us at **support@dms-datavalidate.com**.

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

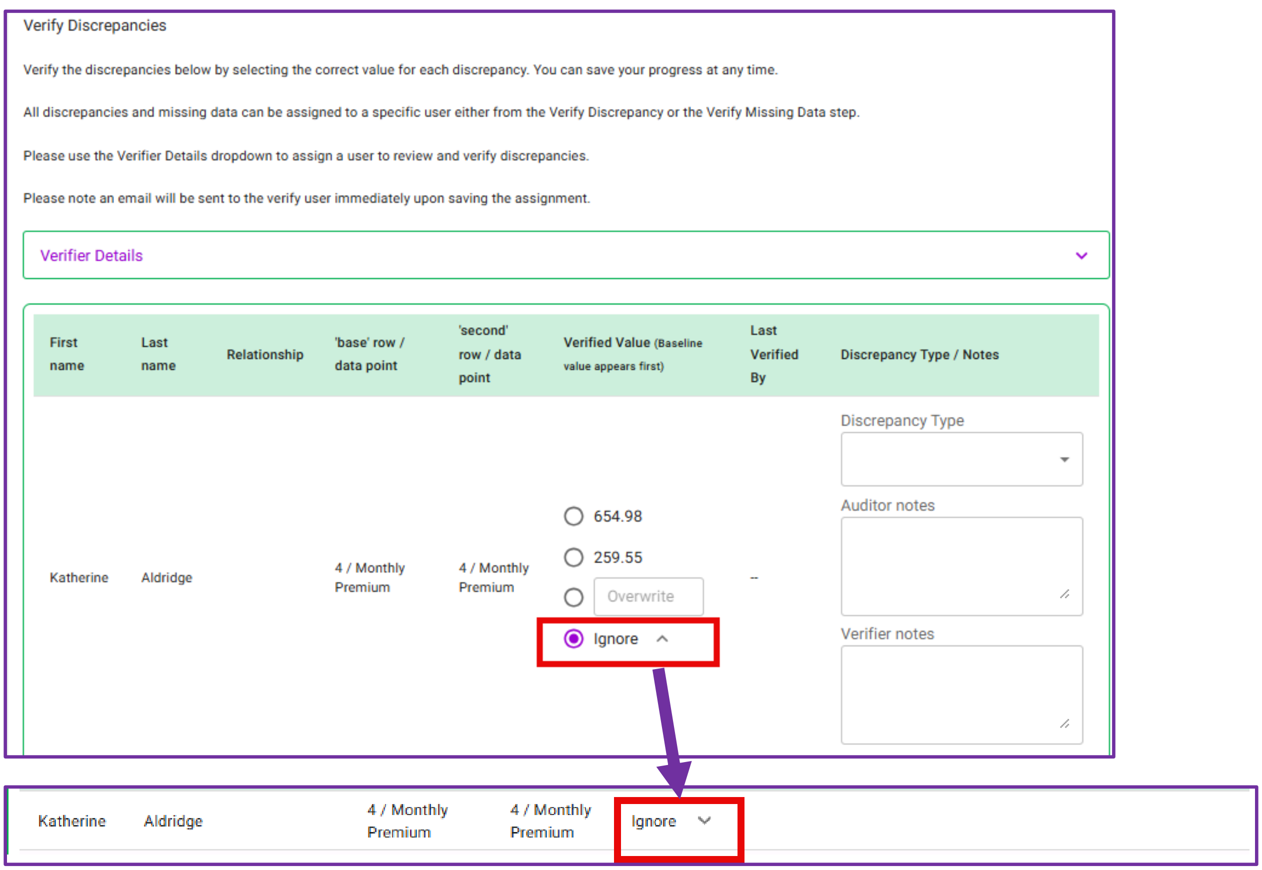


Verify Discrepancies

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

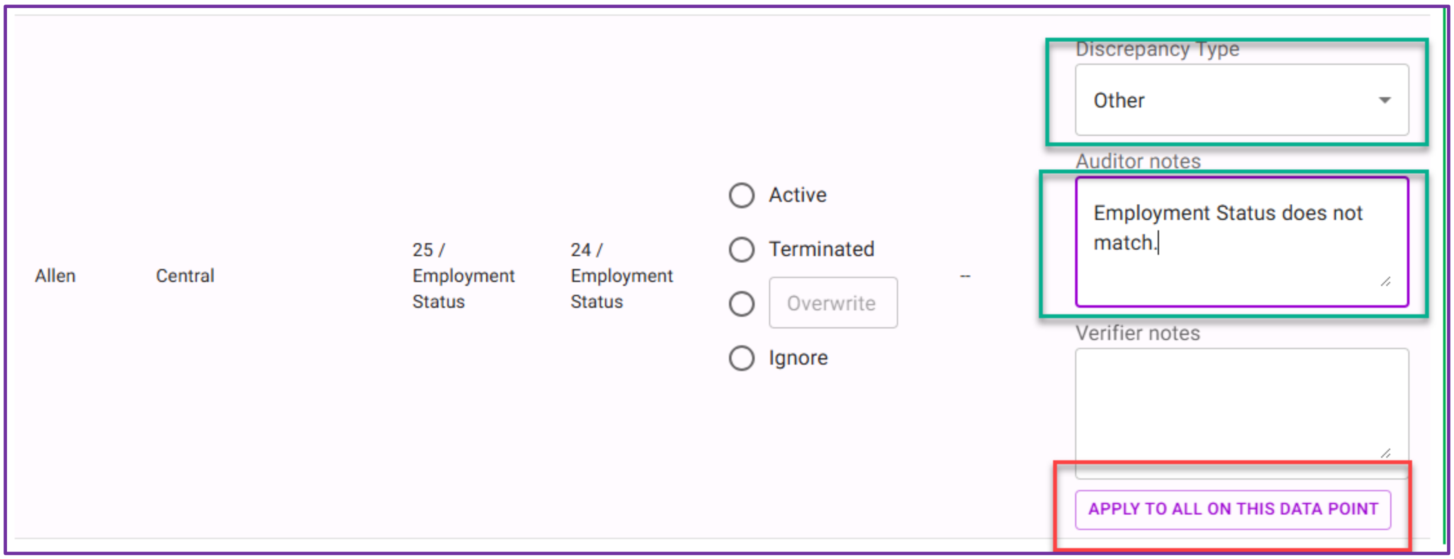


If the discrepancy is not a true discrepancy or if the verifier desires to ignore it, select IGNORE. Any discrepancy marked as IGNORE, can be minimized by clicking the caret (^)

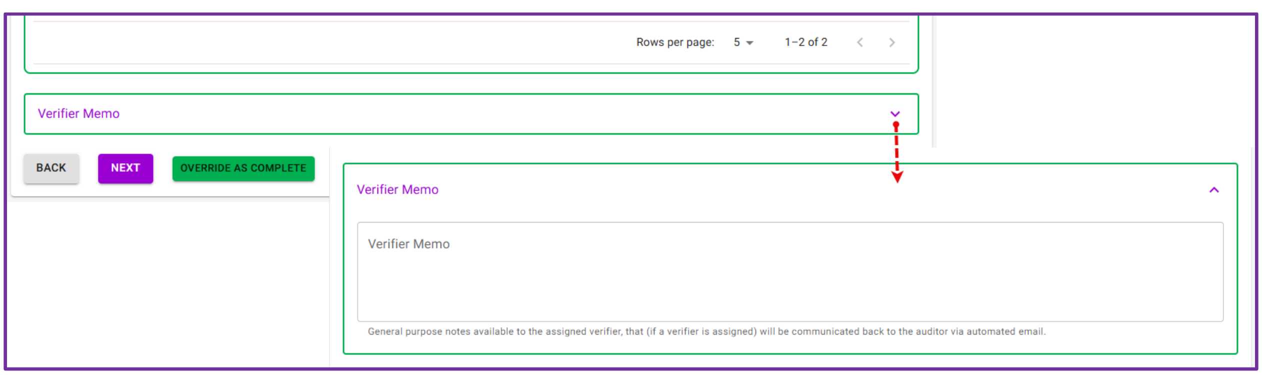


You can now use the **Apply To All On This Data Point** feature to update matching data points. When selected, the chosen discrepancy type and any auditor notes will automatically be applied to all occurrences of the same data point. Please note that the **Apply To All** will overwrite any existing discrepancy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

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

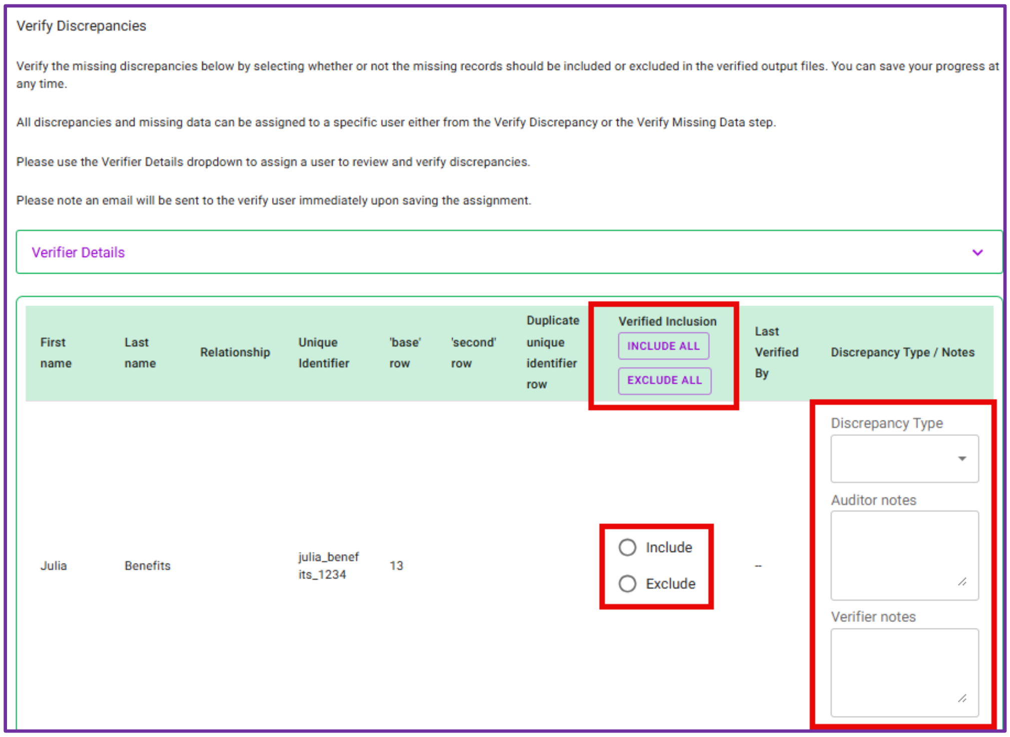


Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.

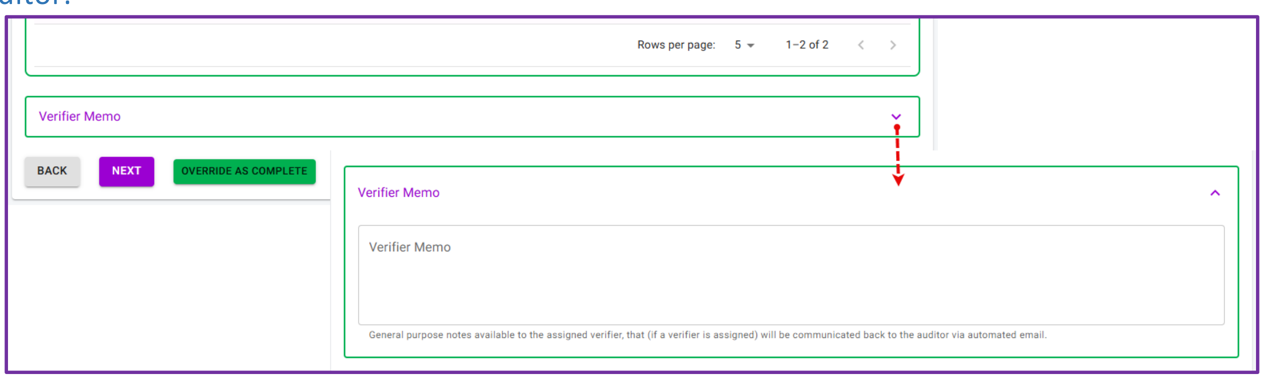


Verify Missing

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

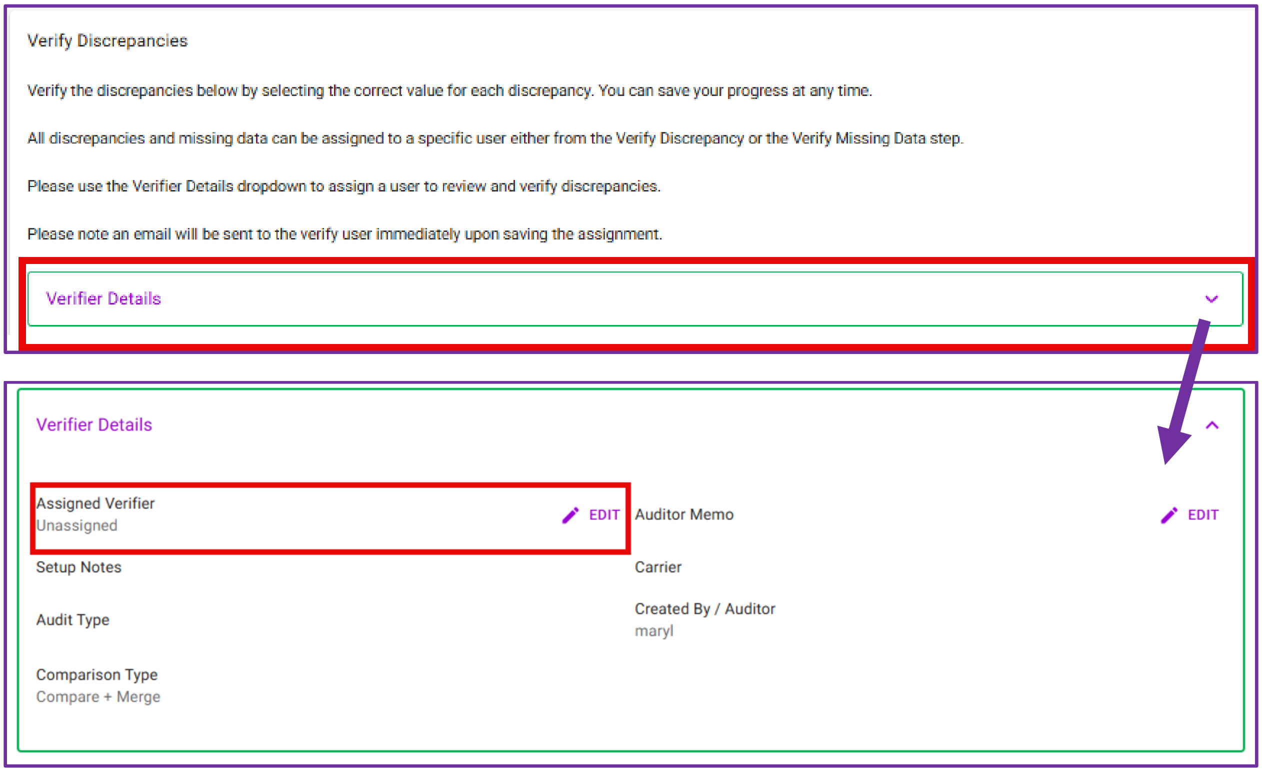


Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.



Assign a Verifier to the Compare

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



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

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

Hello {Verifier First Name},

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

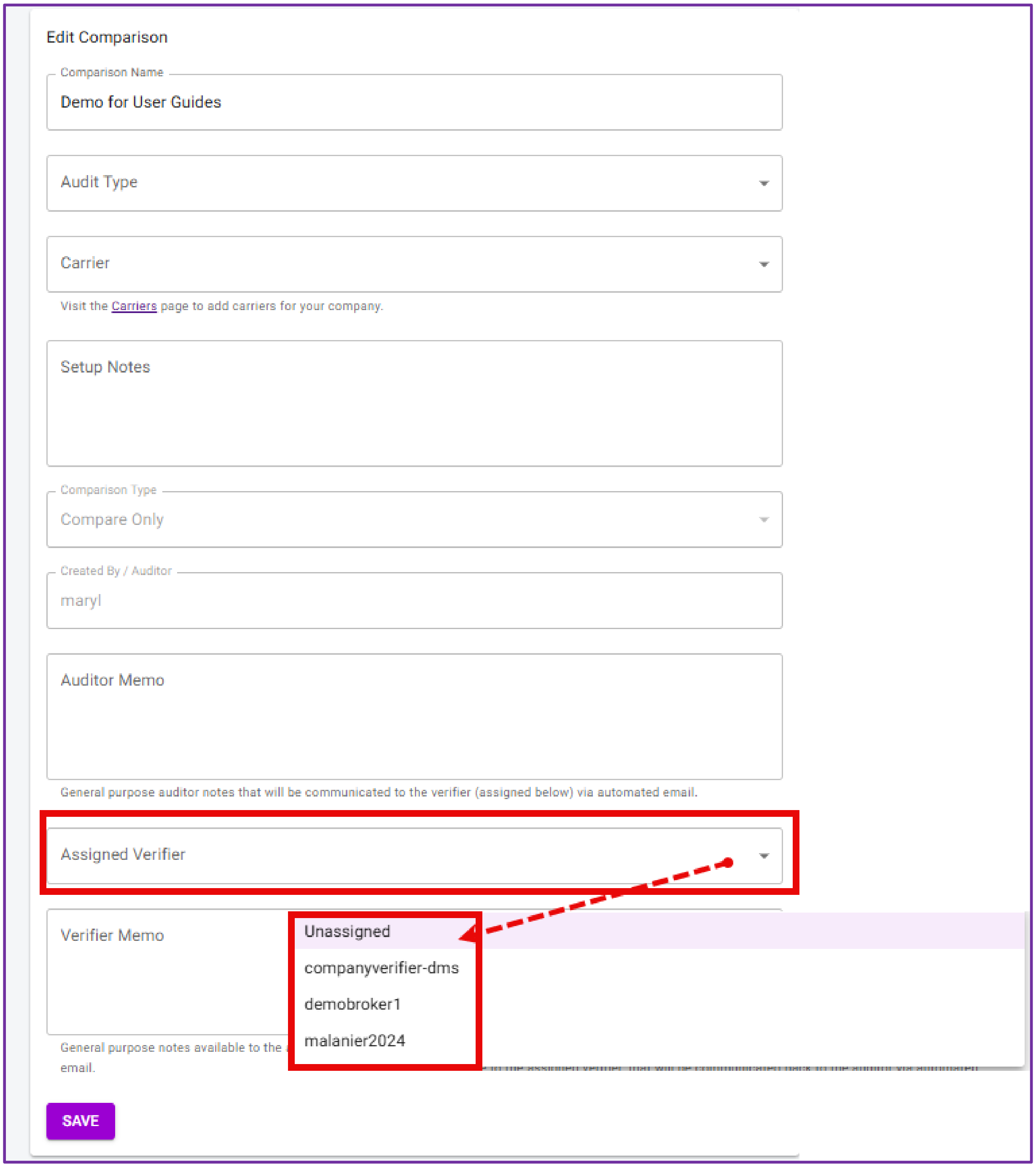
Please click here below to log in and complete the verification process for any discrepancies.

{Auditor Memo}

Thank you,

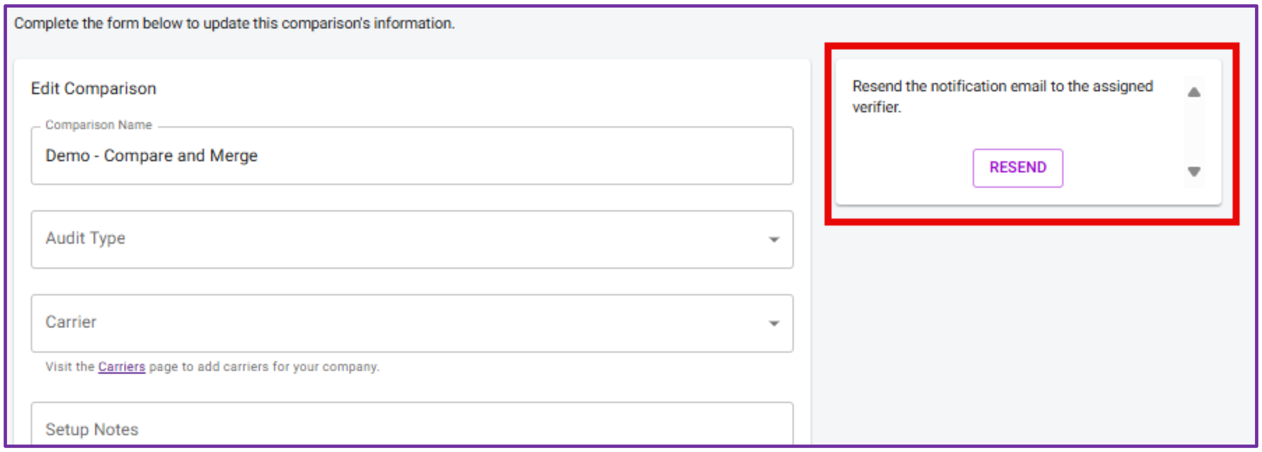
On behalf of {Auditor First Name and last Name}, {Organization Name if Org Level or Company Name if Company Level User}

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



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

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



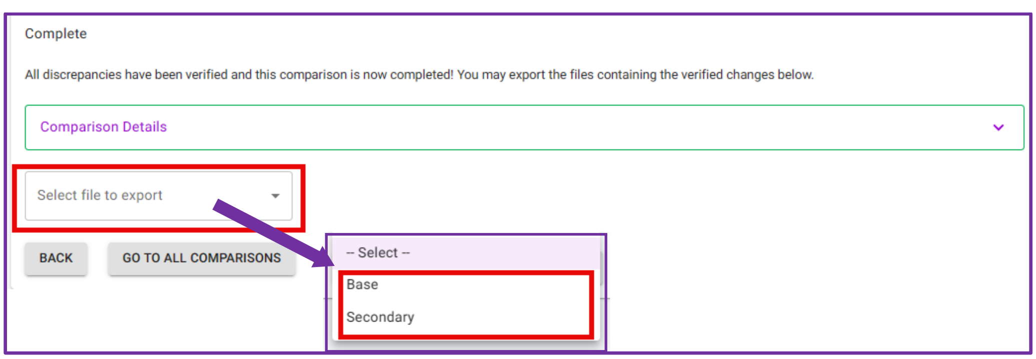
Complete the Compare

Data verification is complete.

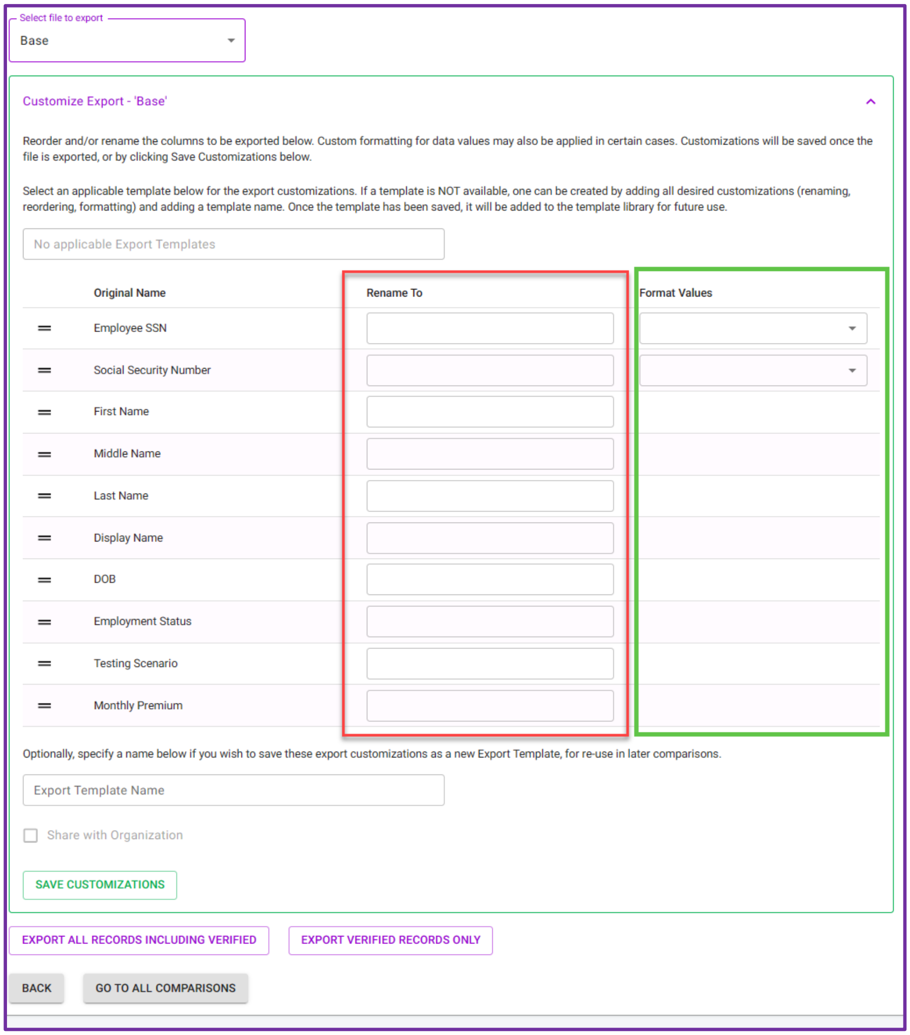
If the audit was assigned to a specific user within the application, the auditor will receive a notification email that the audit is complete.

> Hello {Auditor First Name},
>
> This is to inform you that the assigned verifier, {Verifier First Name and Last Name}, has finished verifying the discrepancies for your comparison: {Comparison Name} for {Company Name}.
>
> Please click here below to log in and complete the audit process.
>
> {Verifier Memo}
>
> Thank you,
>
> On behalf of {Verifier First Name and Last Name}, {Organization Name if Org Level or Company Name if Company Level User}
>
> This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

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

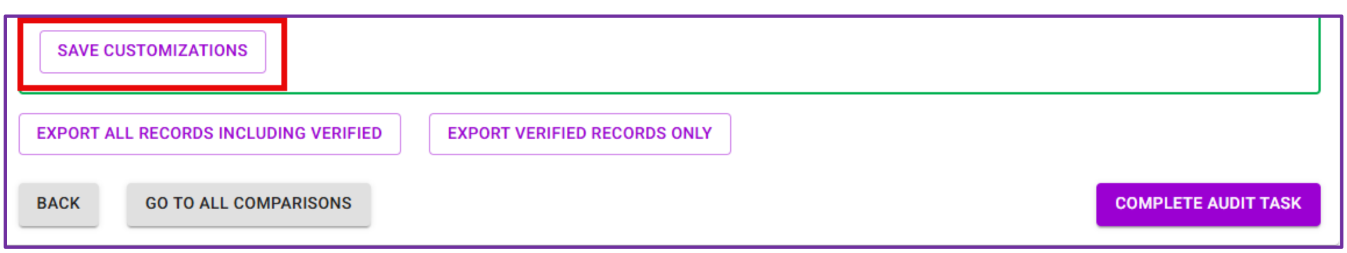


Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the application's key words. For a list of the keywords, please reference the Keys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



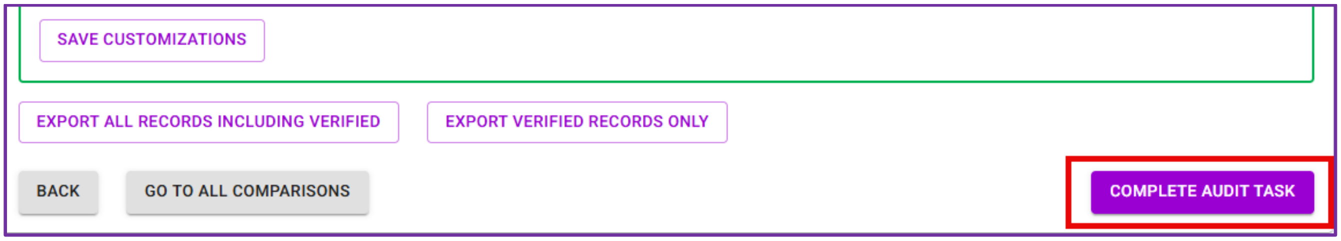
Column names can also be reordered by dragging and dropping data point in desired location.

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



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

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

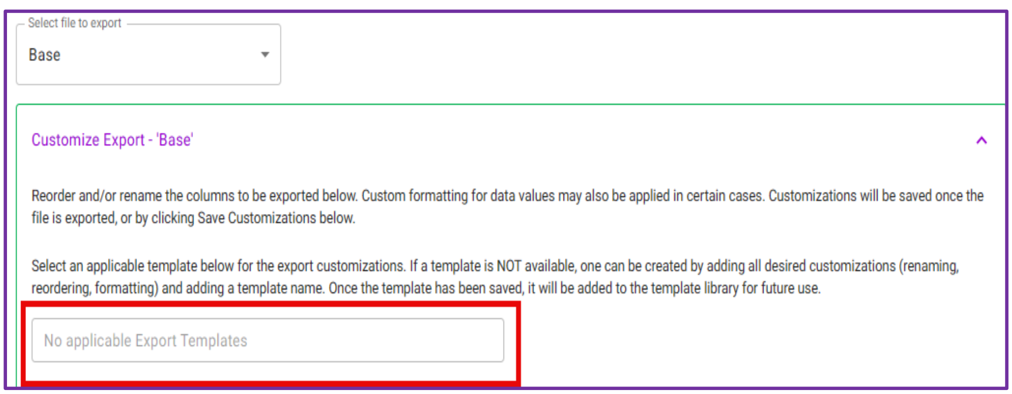


Export Template

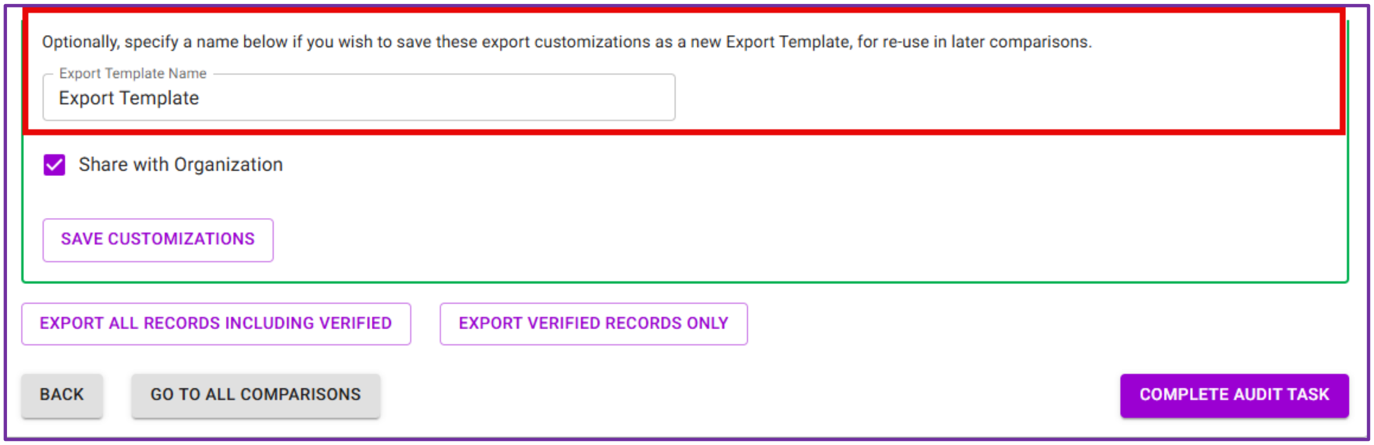
Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming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

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

Selecting export template:



Saving New Export Template:



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

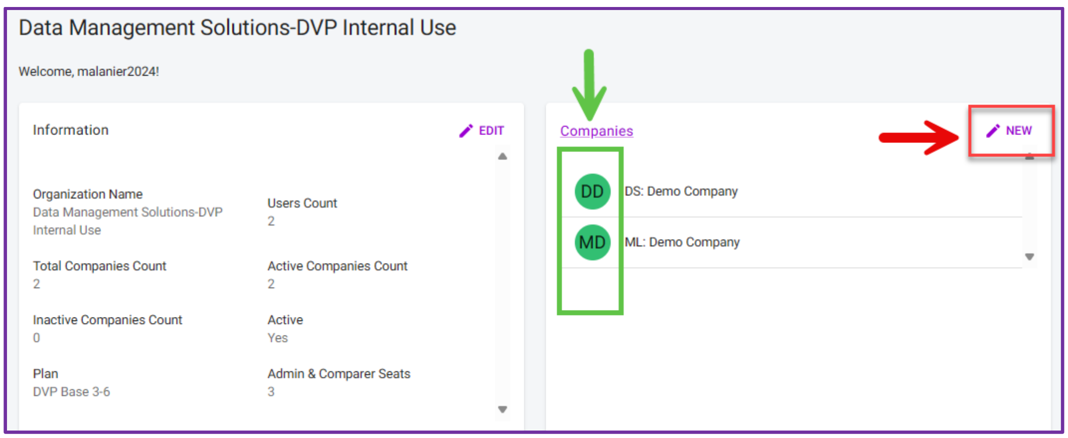
Questions: Contact Support@dms-datavalidate.com

Create the **Compare and Merge**

The compare process consists of several steps from naming the compare up to the completion of the comparison. Each step must be completed to advance through the compare process. All steps beyond Step 5 - Compare can be ignored if not needed. Prior completed steps with the exclusion of the compare creation can be revisited and reset if desired.

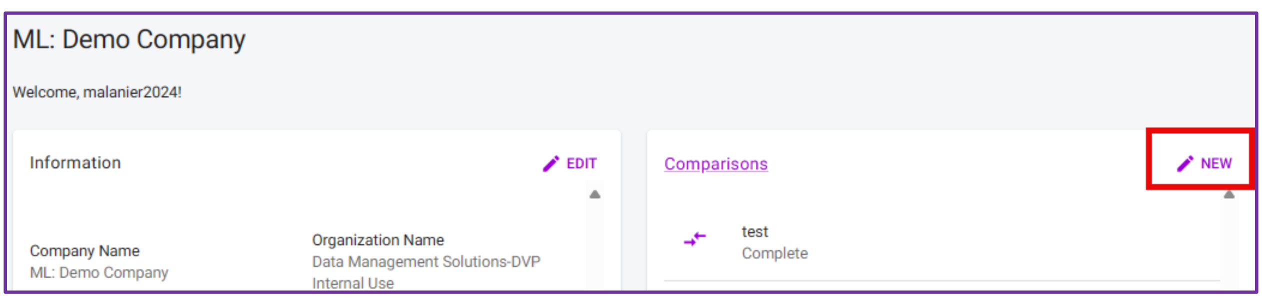
Select the Company

Select Company or click NEW to create a new company.



Create New Compare

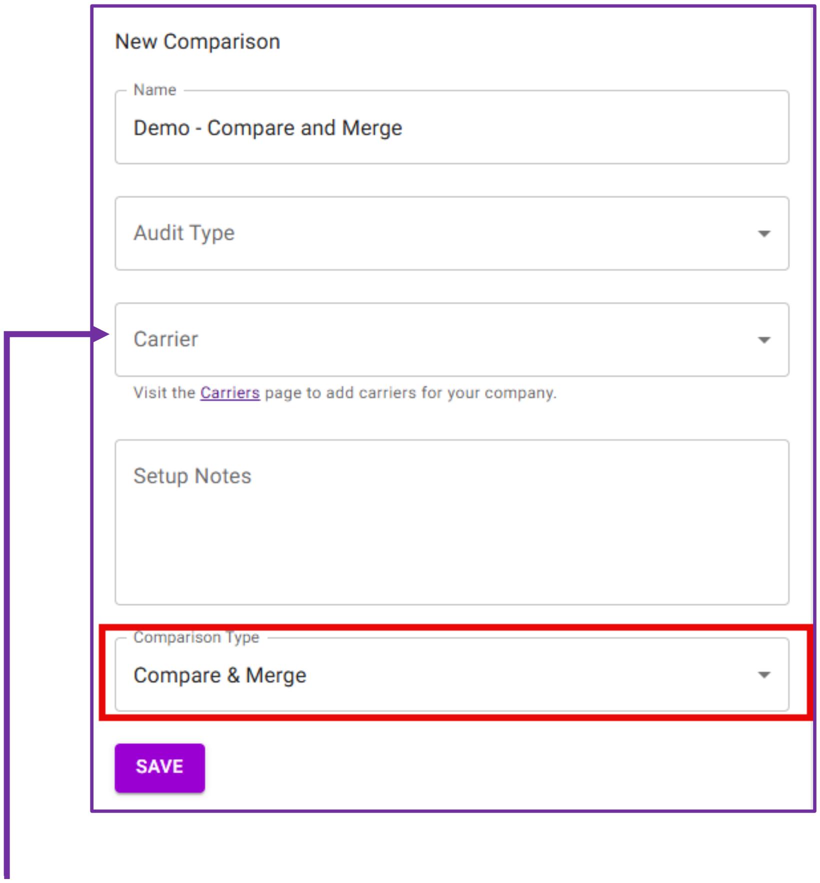
Select NEW to begin a new comparison



Name the Compare

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

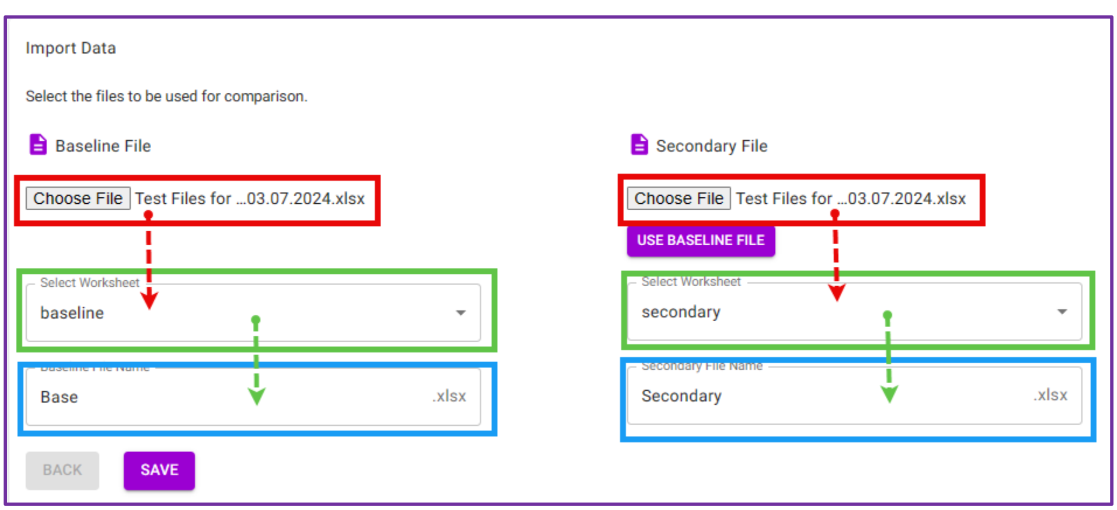
Please Note that once the comparison type is selected and saved, it cannot be changed.



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

Import Files

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

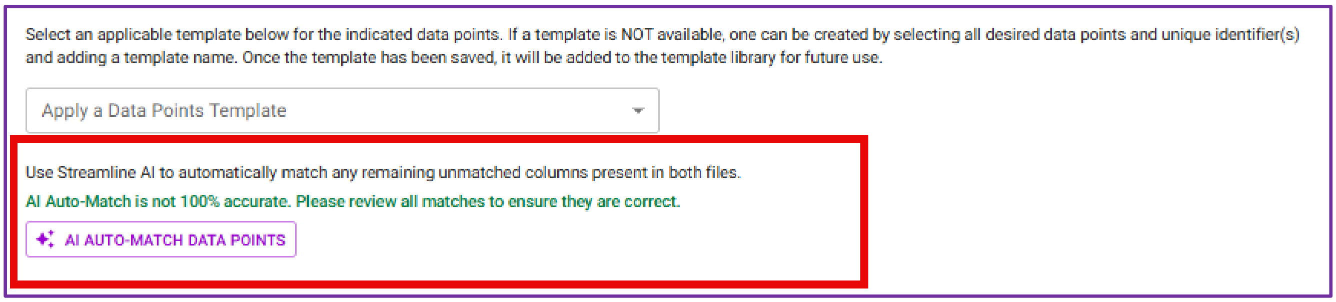


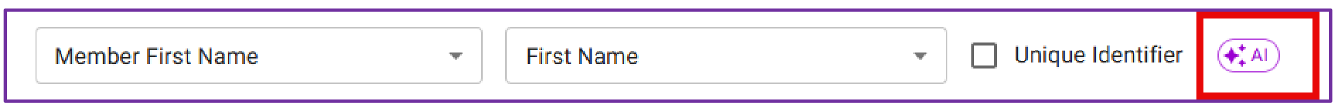
Select Data Points & Create Import Template

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

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

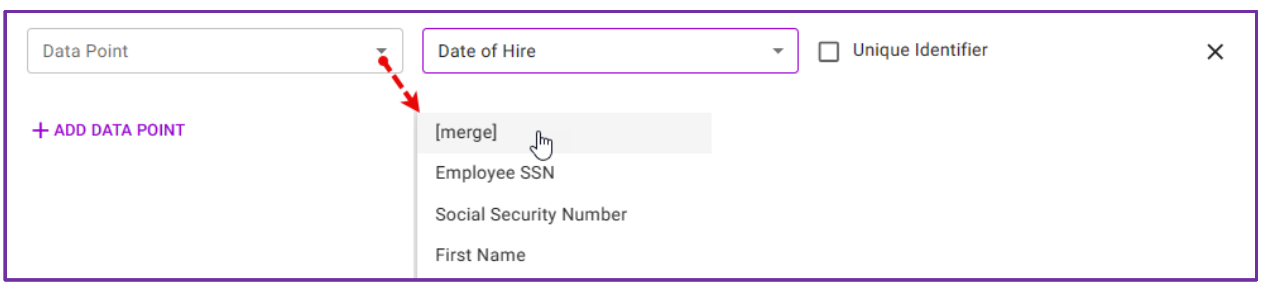
The option to use AI is available by selecting the **AI AUTO MATCH DATA POINTS** button. This will prompt the system to attempt to match any remaining data points. All AI-matched fields will display an AI icon beside the data point.





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

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



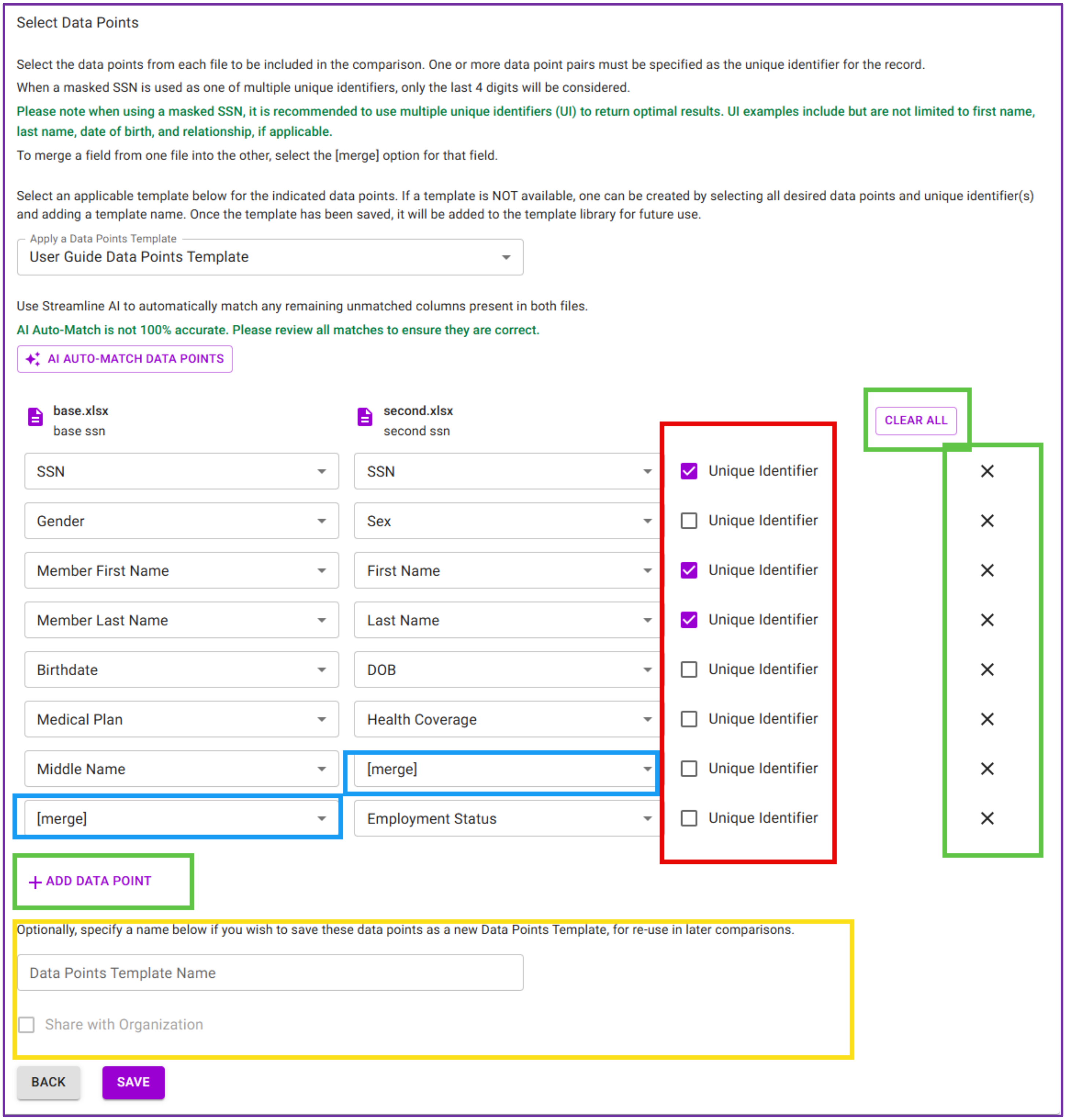
At least **one (1) unique identifier** must be selected. To remove all data points, click **CLEAR ALL**.

If a masked SSN is used as one of multiple unique identifiers, only the **last four digits** will be considered.
Note: When using a masked SSN, it is strongly recommended to include additional unique identifiers (UIs) such as first name, last name, date of birth, or relationship (if applicable) to ensure the most accurate results.

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

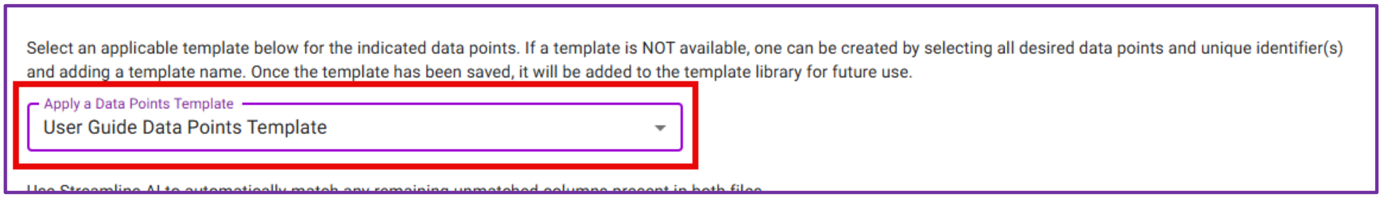
Company Admins (available under the Platinum Elite subscription) will only have access to templates created within their specific company.

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



Select Data Points & Reuse Existing Template

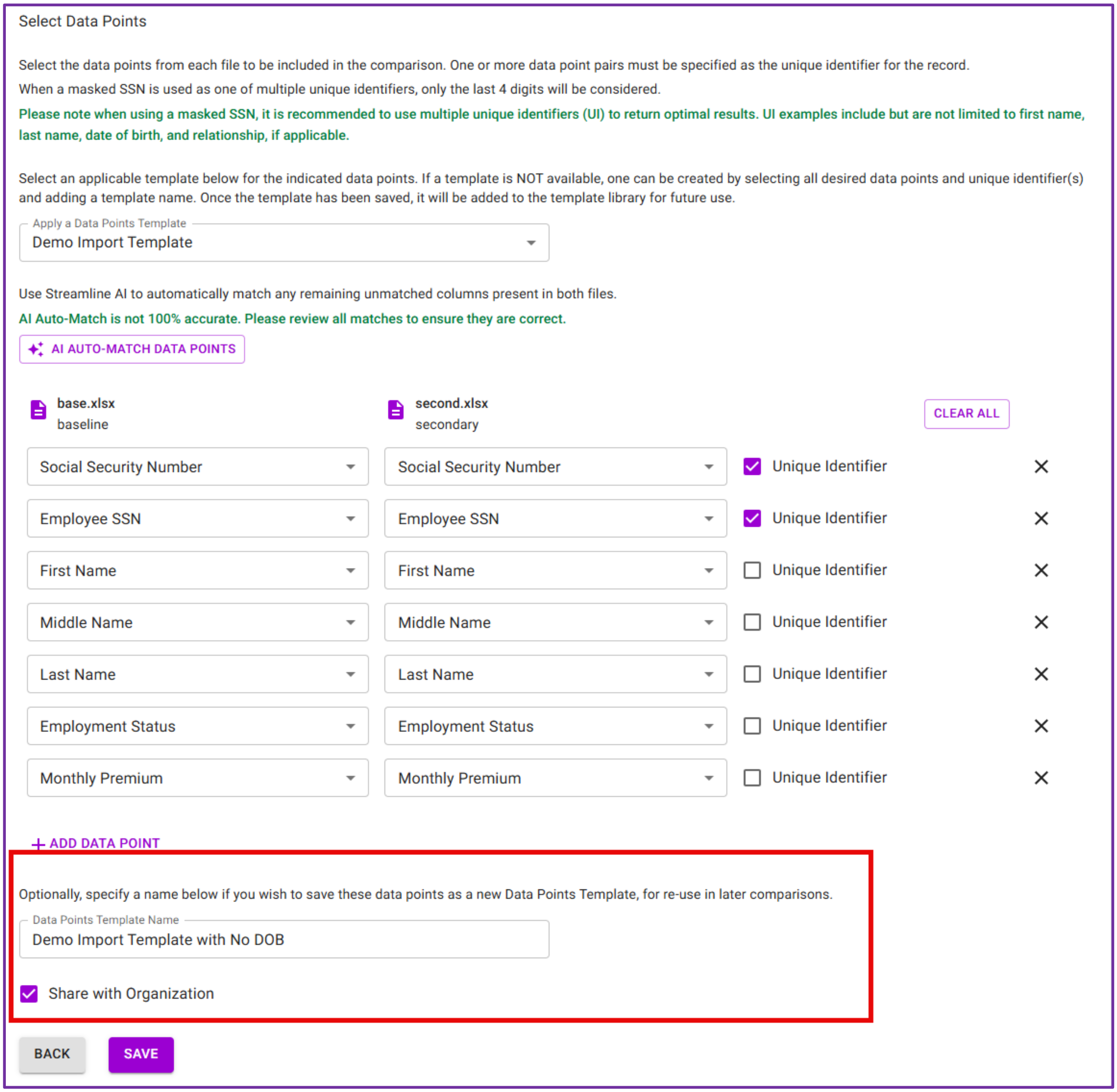
Select an applicable data points template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the import file column names. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use and can optionally be shared with the organization for reuse under other companies.



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

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

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



Mapping

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

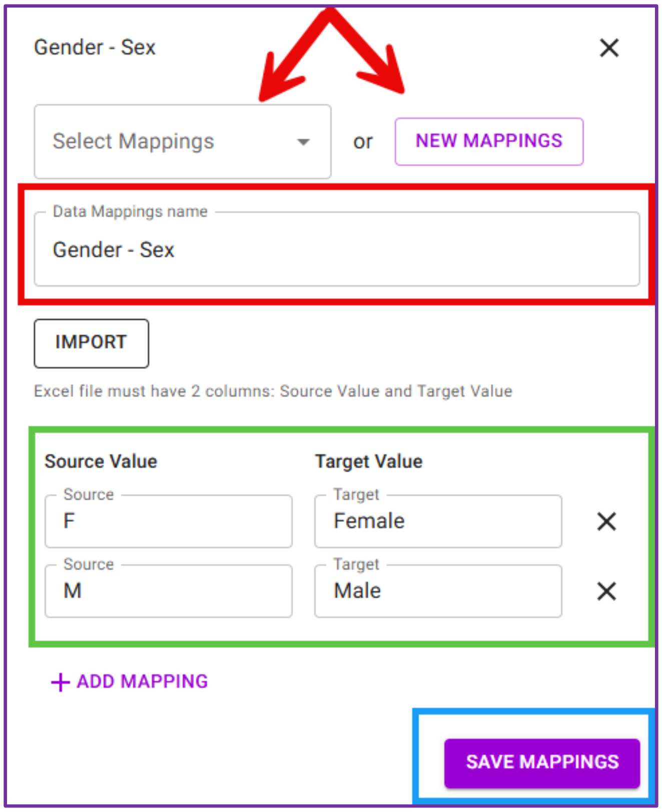
Mappings can be created several ways.

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

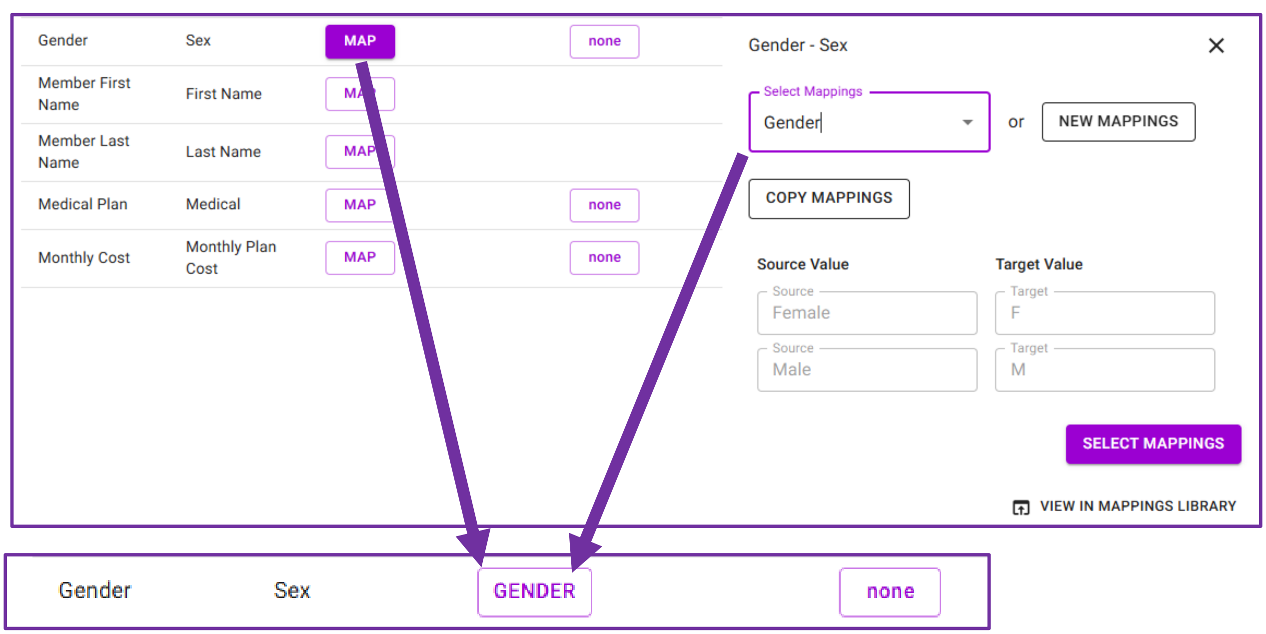
To Manually create a mapping:

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

Click SAVE MAPPINGS to newly created mapping to save.



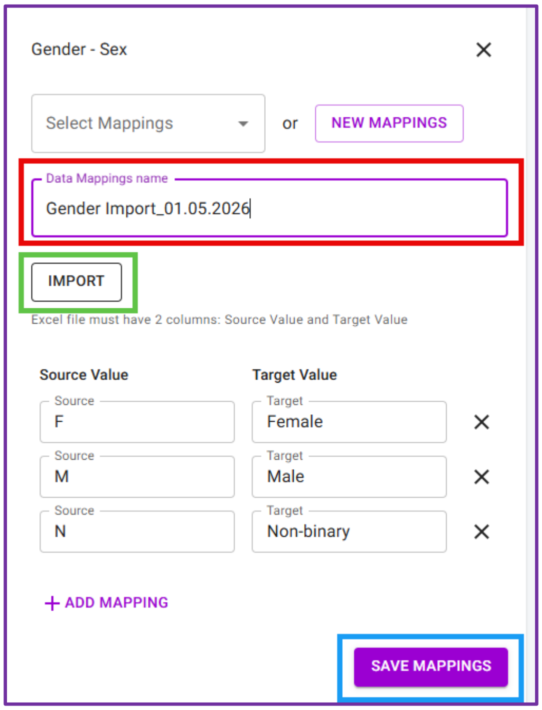
If you use existing mapping, click SELECT MAPPINGS.



To Import a mapping:

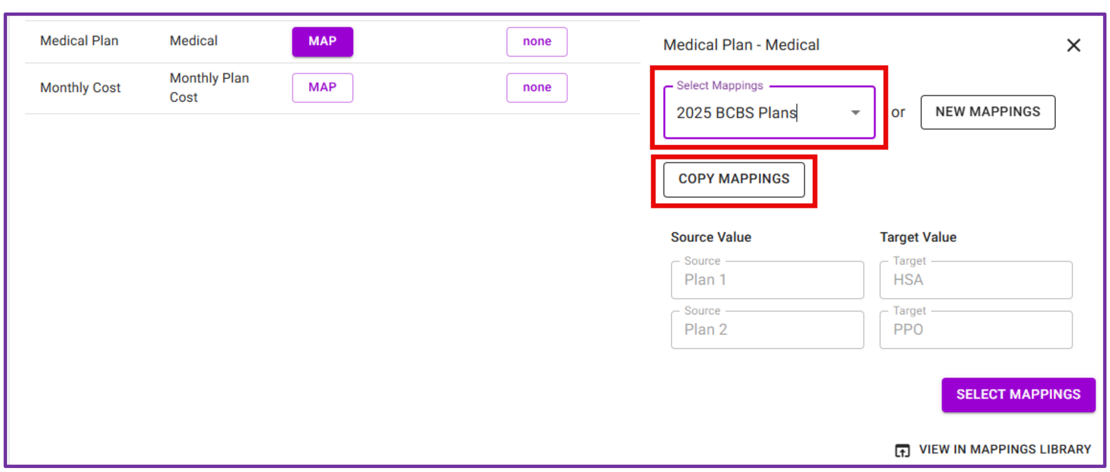
To add a new mapping, click **New Mappings**. Enter a mapping name, then select **Import**.
The import file may be a single-sheet Excel file or a CSV file. If you are using an Excel file with multiple sheets, the mapping **must** be on the first tab—otherwise, the import will fail.

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



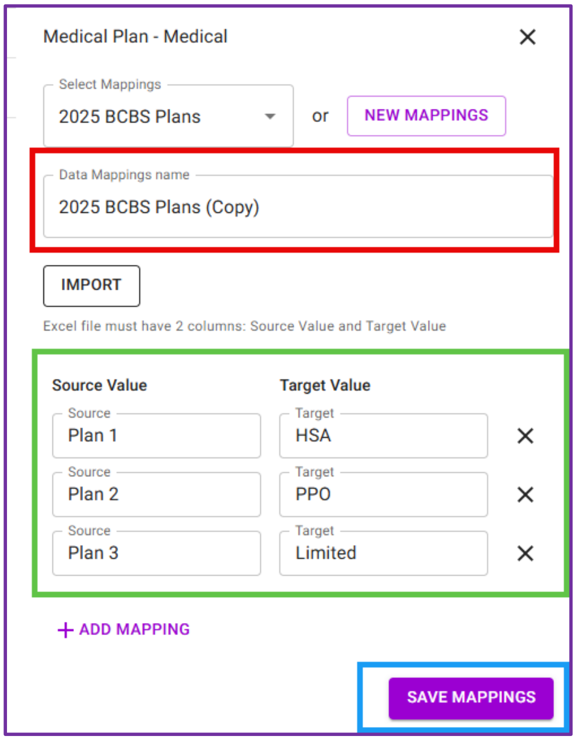
To Copy and modify an existing mapping:

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

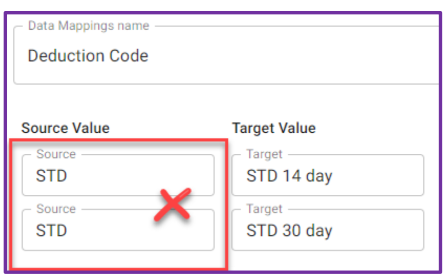


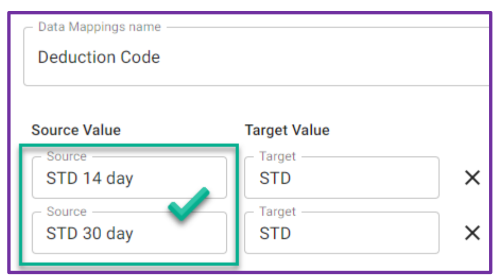
This creates a duplicate of the mapping with **(copy)** added to the name. You can then rename the mapping and add, update, or remove any source or target values as needed.

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



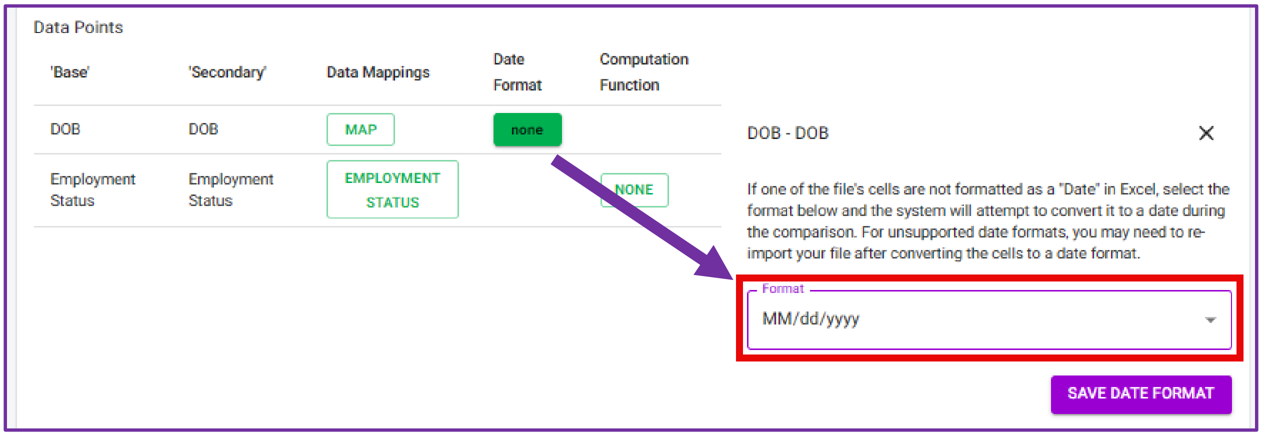
NOTE: The **SOURCE VALUE** in mapping must be unique. If the same value is used more than once under **SOURCE**, an error will occur. However, it is acceptable to use the same **TARGET VALUE** multiple times.





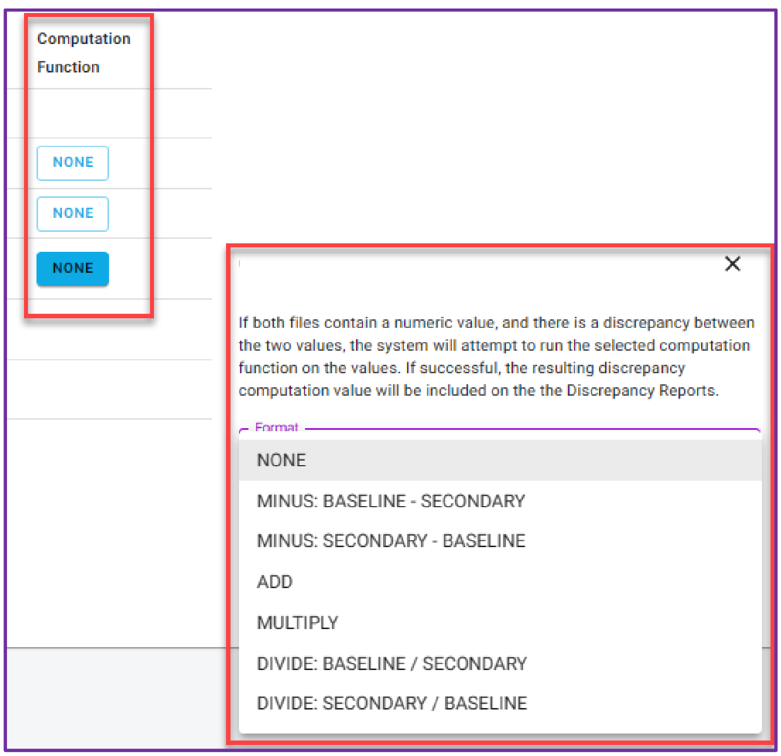
Mapping – Date Format

If the date is not formatted in the files as a date or a different formatting type, select the matching format to convert from text to date and then SAVE DATE FORMAT. If matching format is not available, the date must be corrected manually in the files and then re-imported. Click NEXT once the mapping is complete.



Mapping – Computation

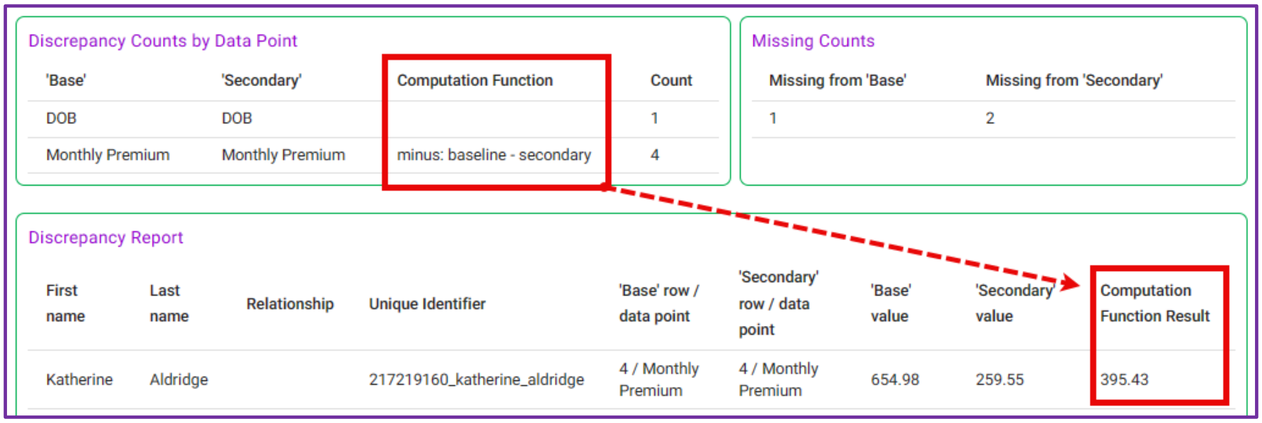
Add a computation (subtraction, addition, multiplication, division) to any numeric data point from the baseline file to any numeric data point in the secondary file. Add the computation by clicking the button under the Computation Function column for the desired data points and then selecting the function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



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

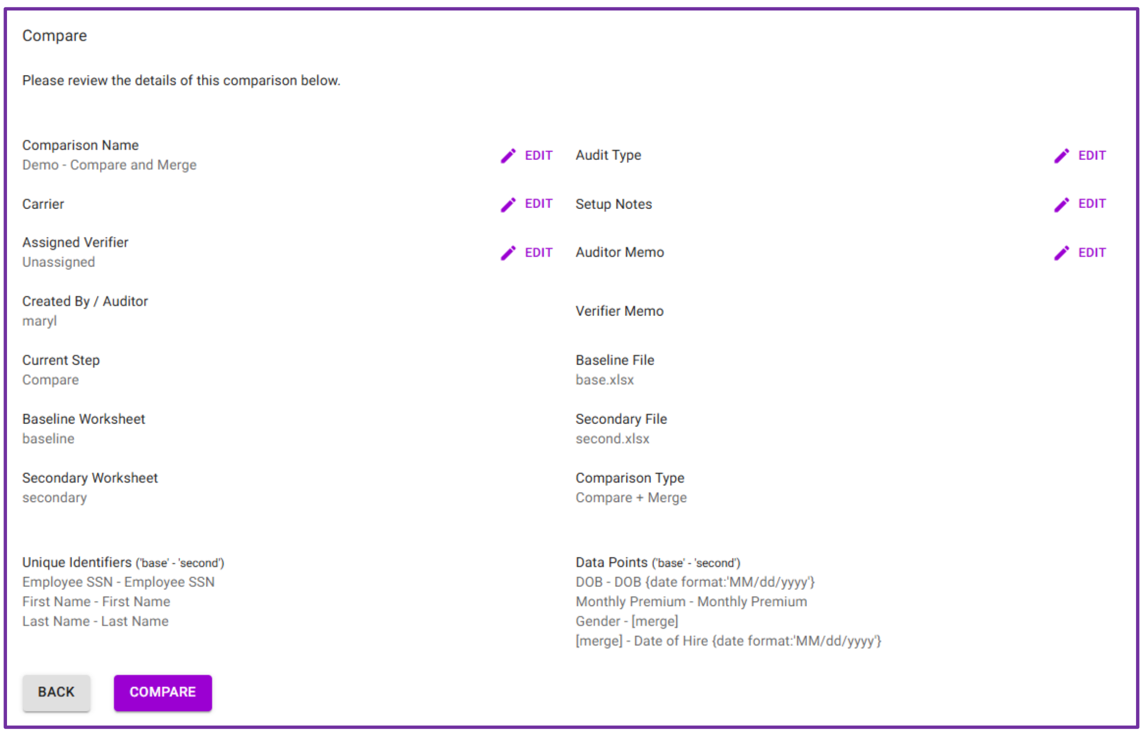
Please note that this functionality will **ONLY** apply to numeric fields and then **ONLY** to data points that have **NOT** been selected as part of the unique identifier.

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

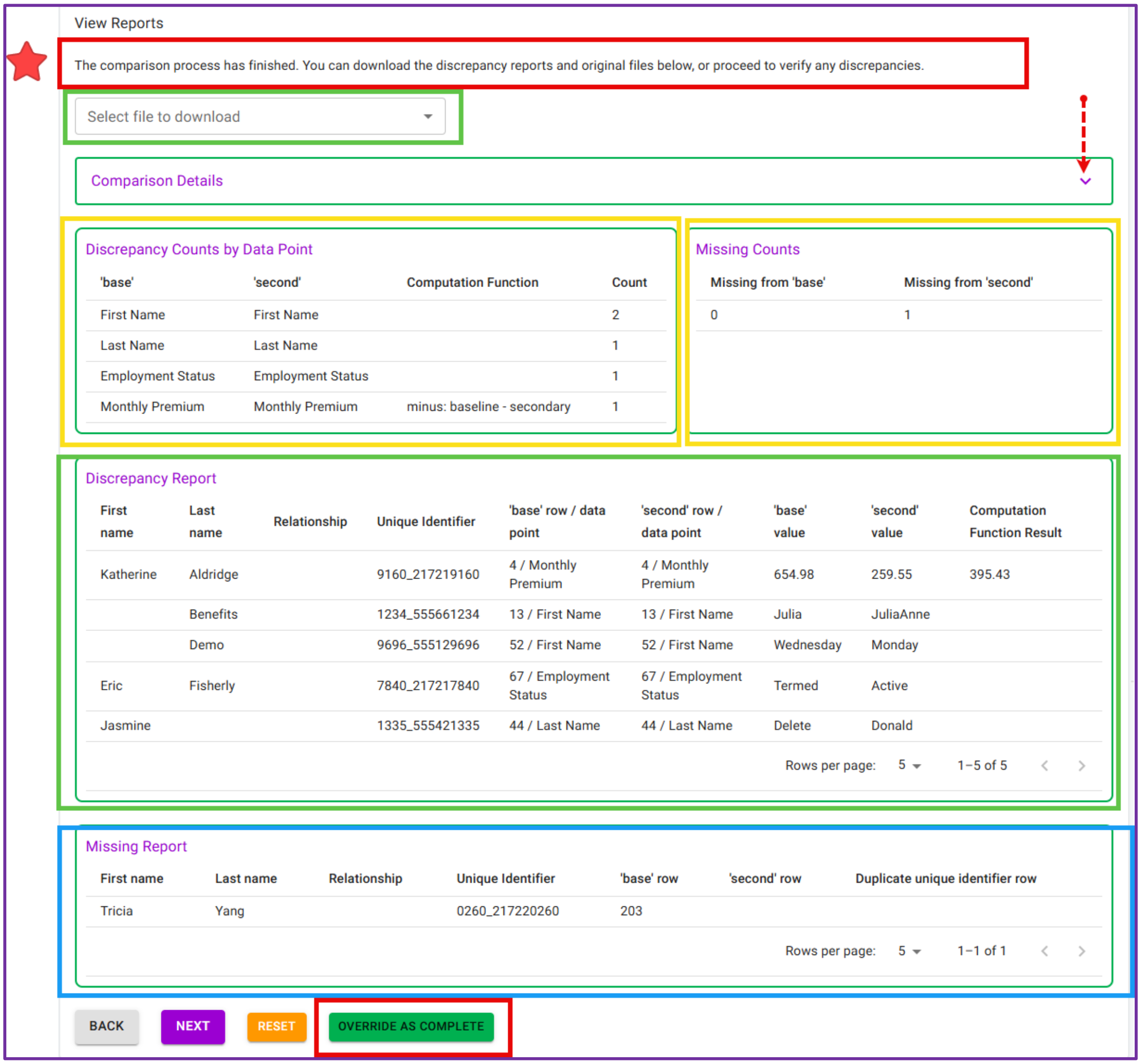


Compare

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



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



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

'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 Counts

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

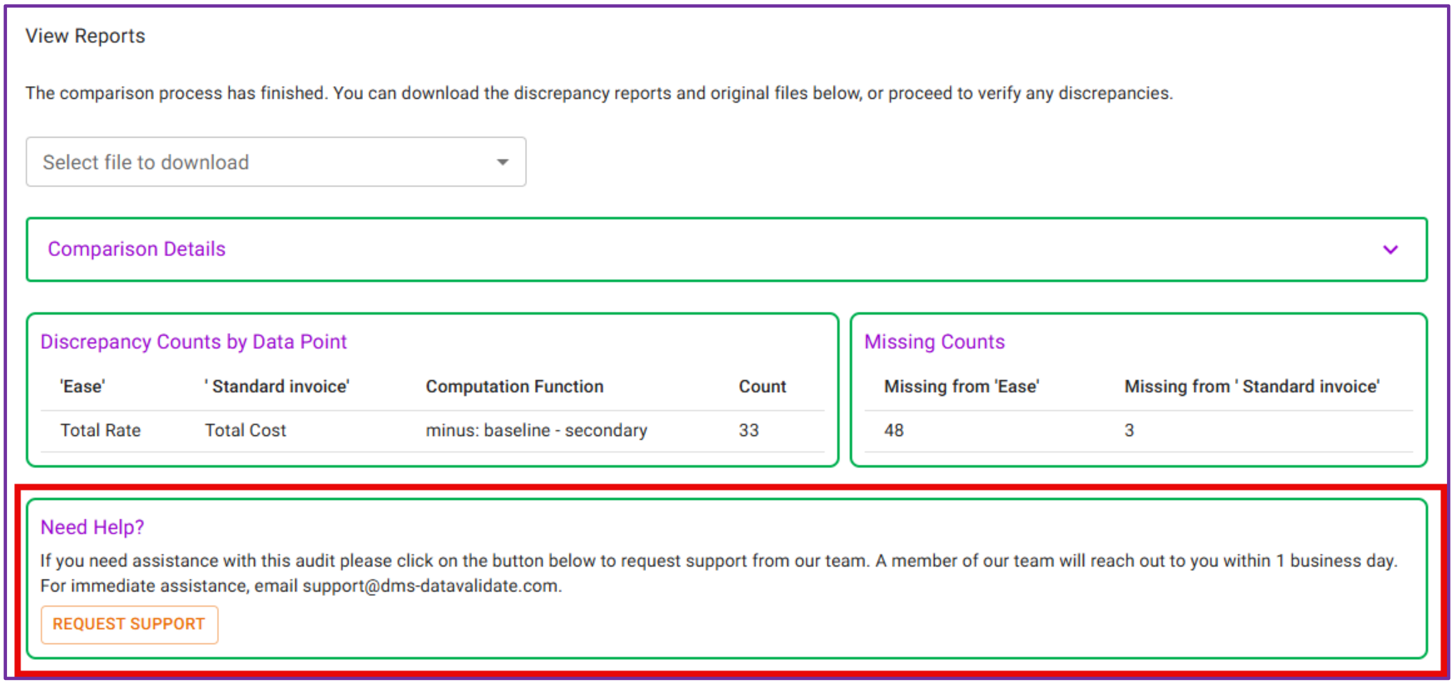
BACK NEXT RESET OVERRIDE AS COMPLETE

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

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

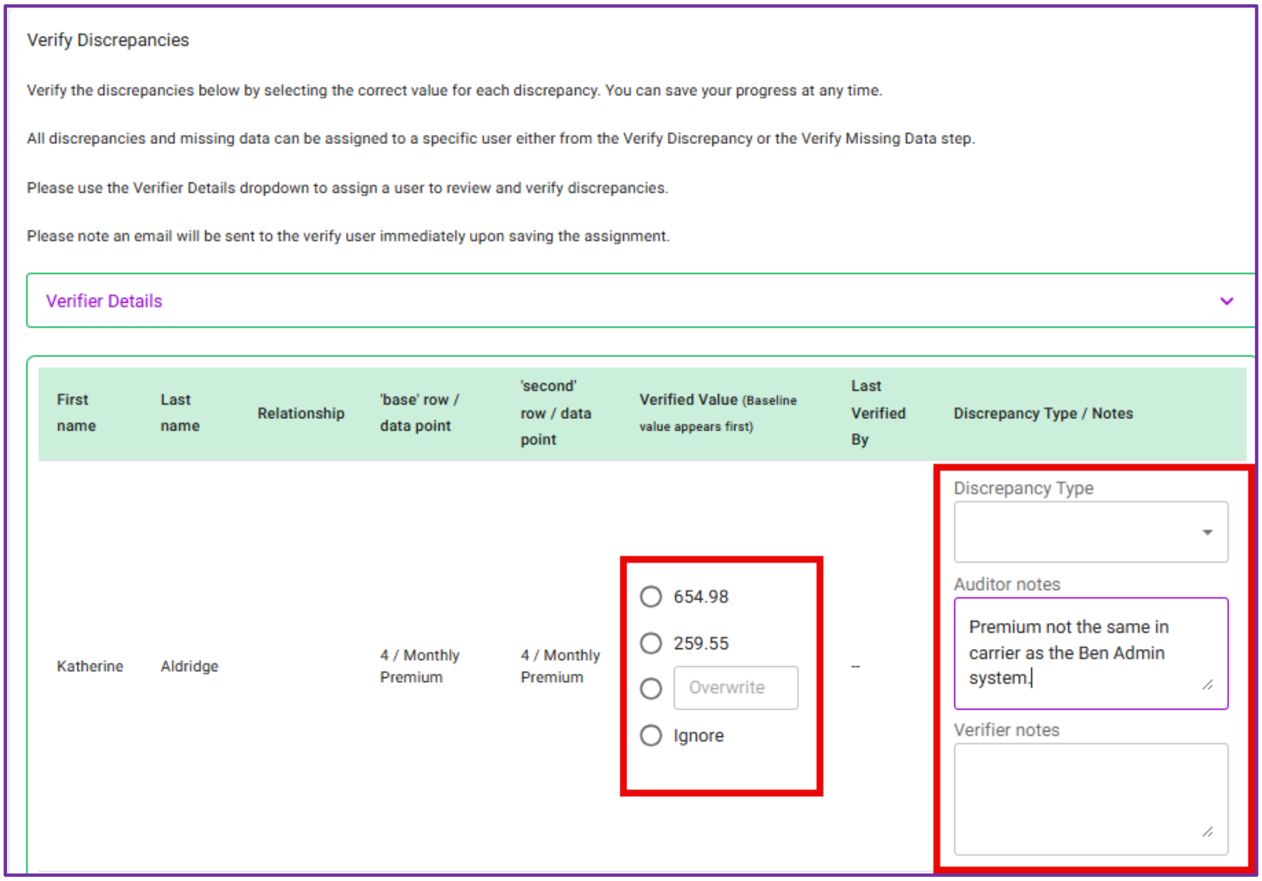
Please note that the **Streamline Support Team** is always available, regardless of audit results. If you need assistance at any time, you can contact us at **support@dms-datavalidate.com**.

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

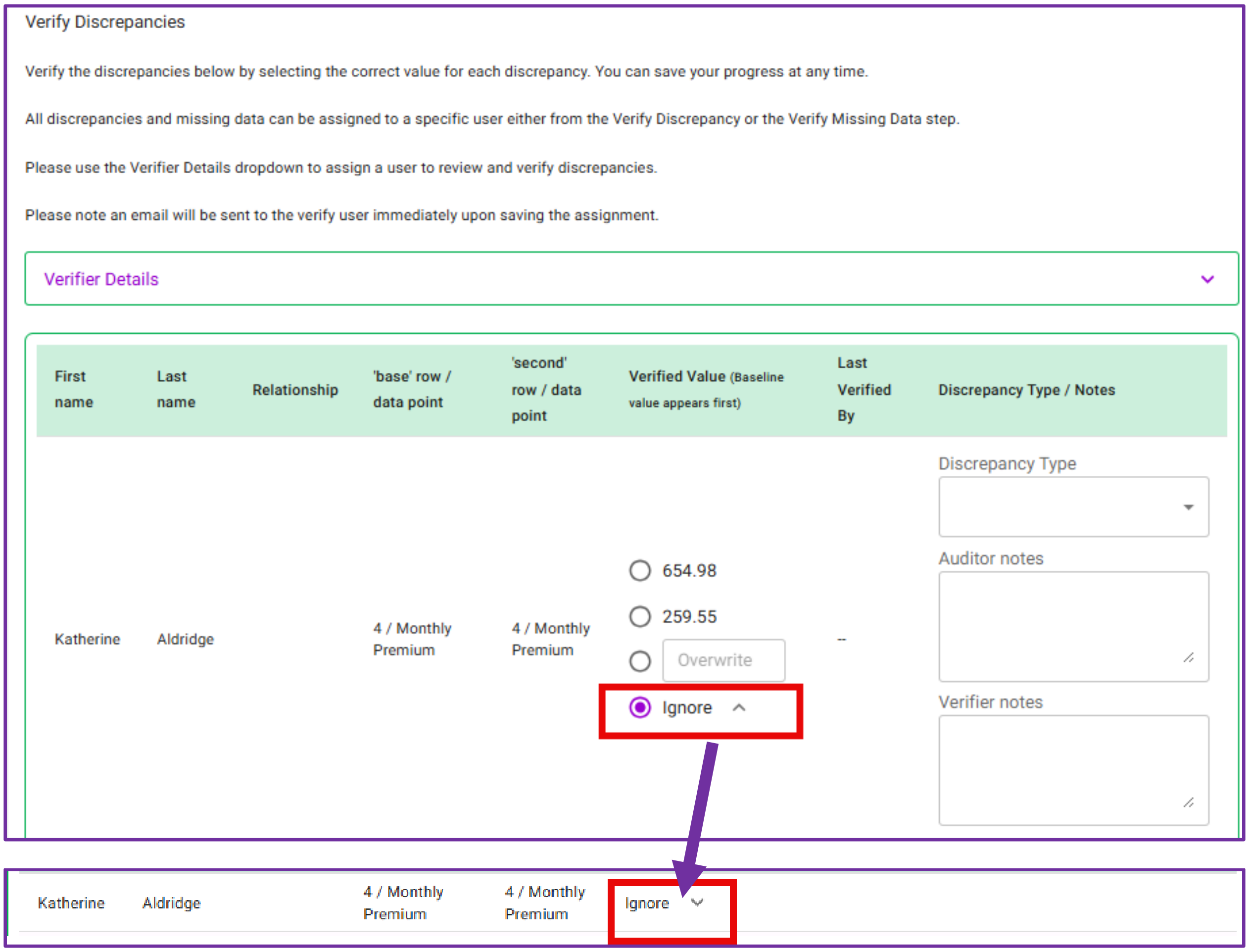


Verify Discrepancies

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

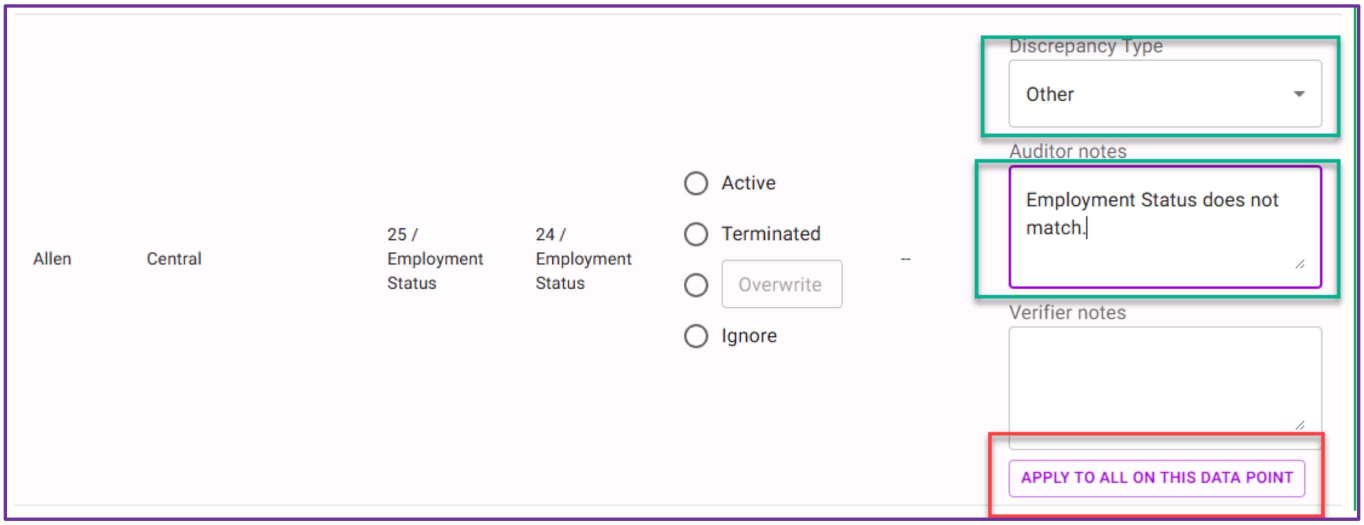


If the discrepancy is not a true discrepancy or if the verifier desires to ignore it, select IGNORE. Any discrepancy marked as IGNORE, can be minimized by clicking the caret (^)

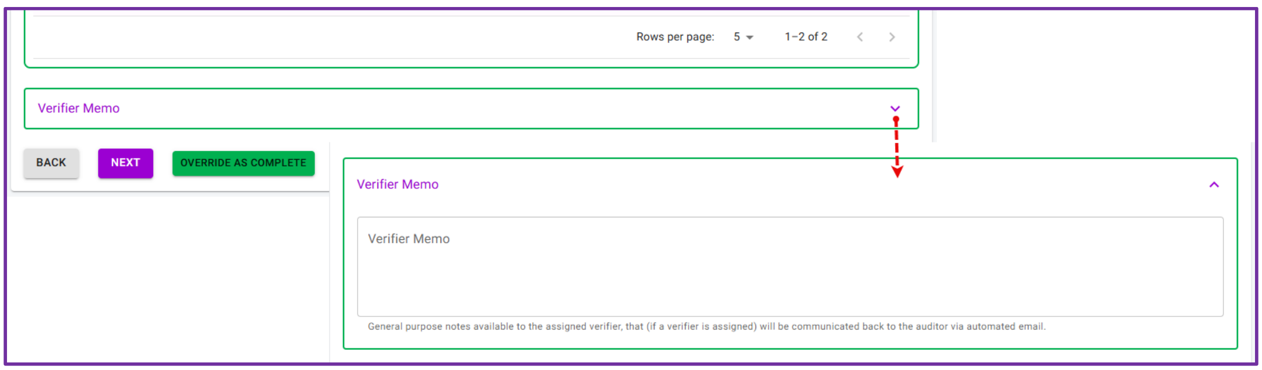


You can now use the **Apply To All On This Data Point** feature to update matching data points. When selected, the chosen discrepancy type and any auditor notes will automatically be applied to all occurrences of the same data point. Please note that the **Apply To All** will overwrite any existing discrepancy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

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

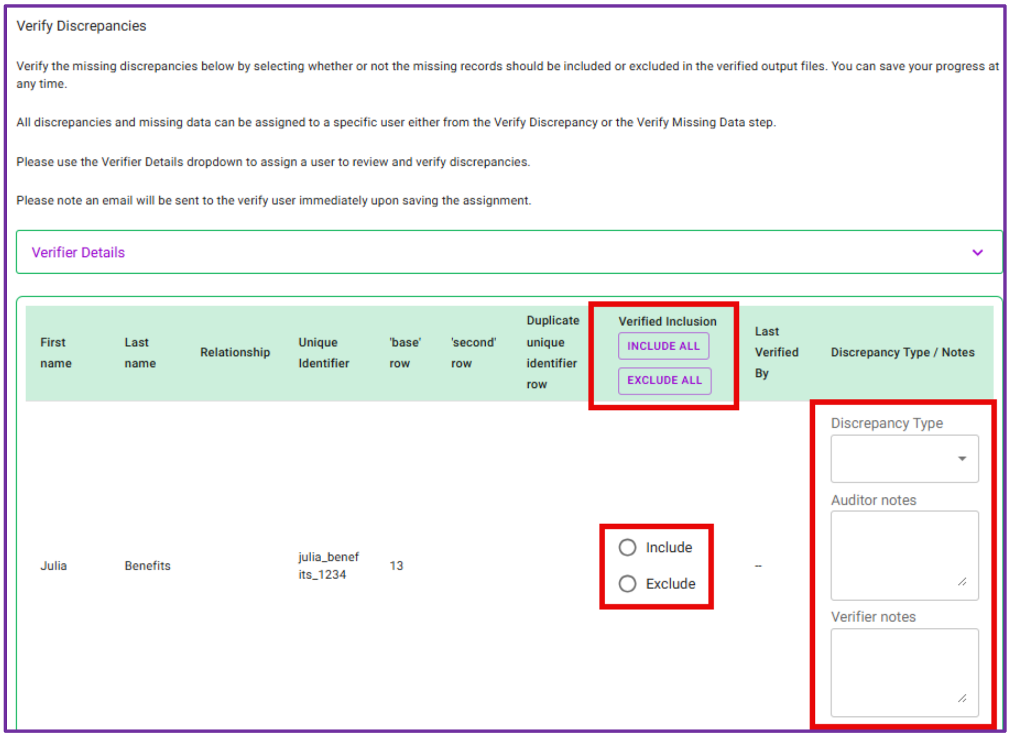


Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.



Verify Missing

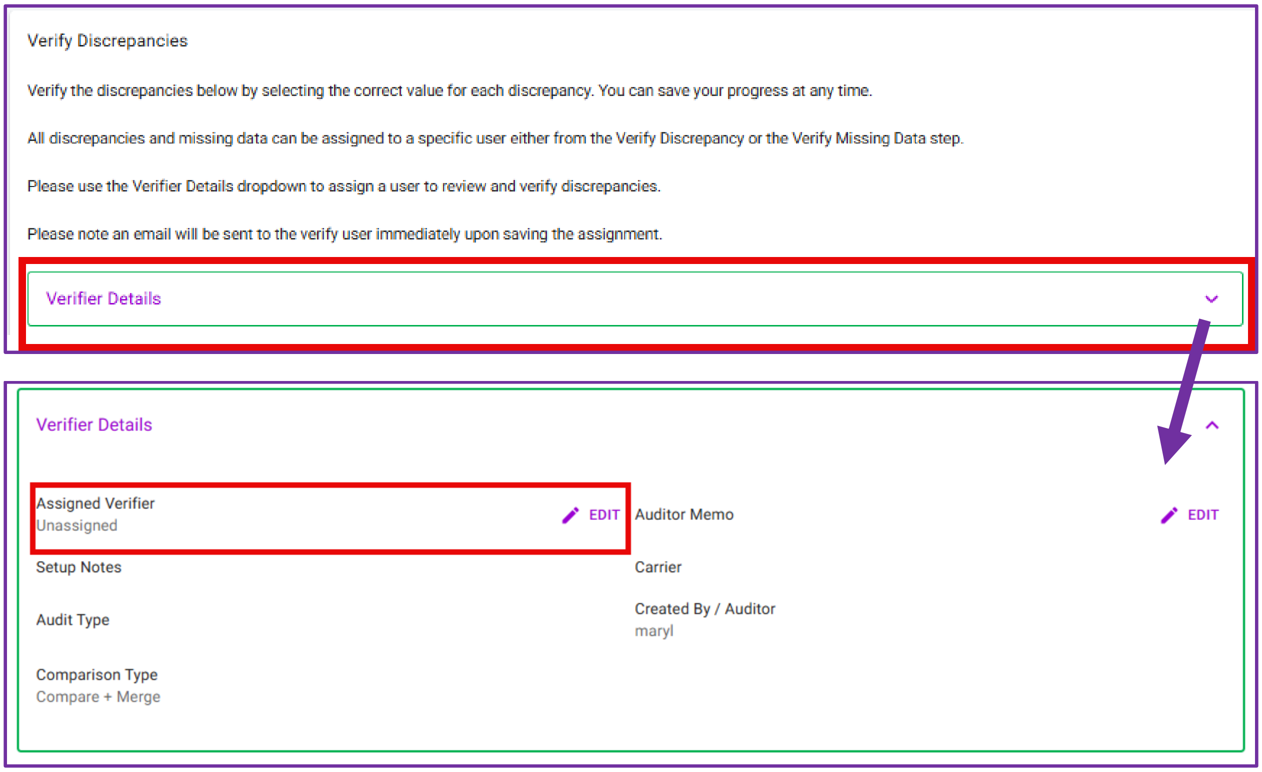
Verify Missing Data entries are identified by the system when the unique identifier from one file cannot be found in the other. If the entry needs to be included, check Include? For a shortcut, click INCLUDE ALL or EXCLUDE ALL to select/deselect all entries. If INCLUDE is selected, the entry will be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



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

Assign a Verifier to the Compare

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



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

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

Hello {Verifier First Name},

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

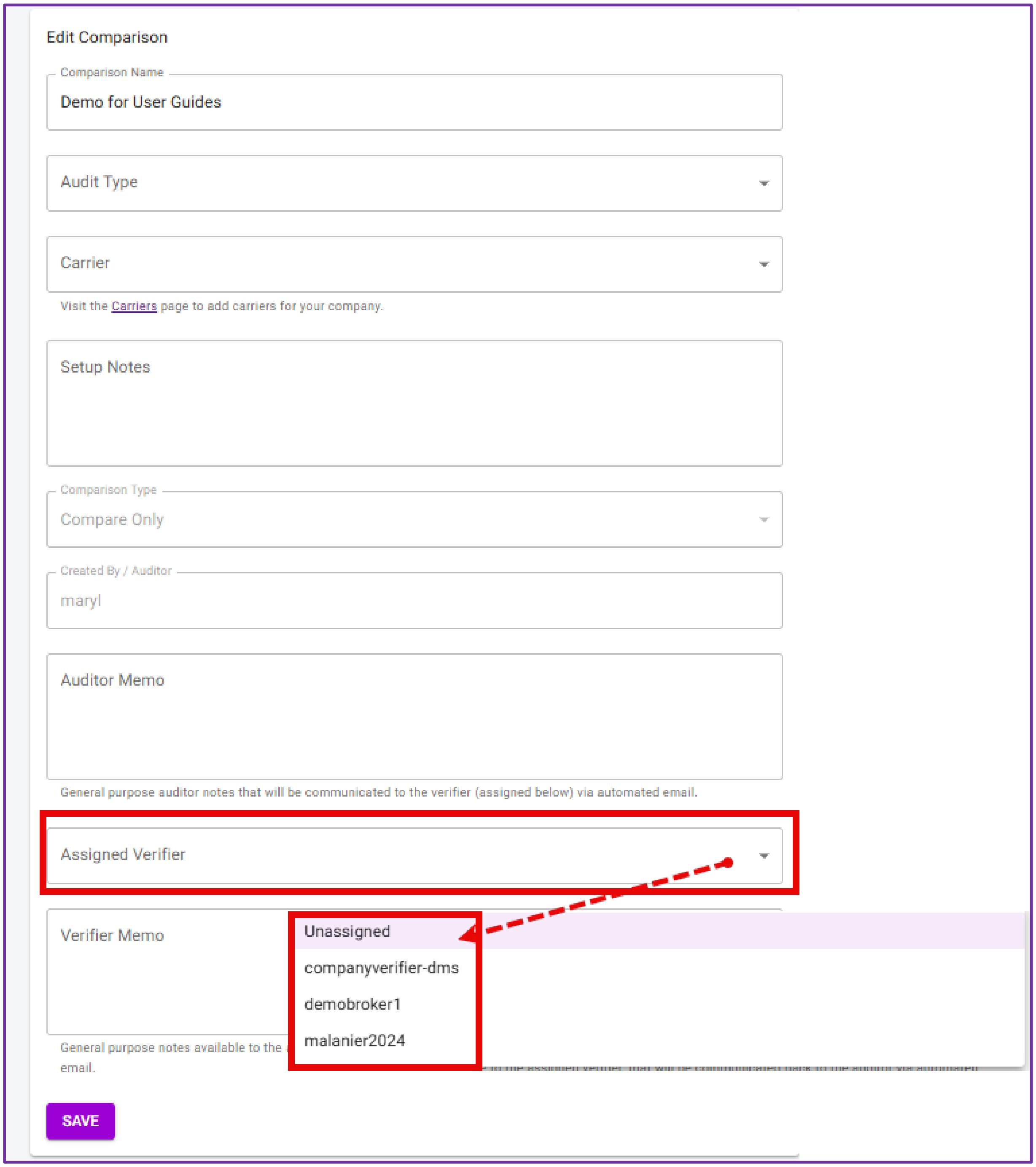
Please click here below to log in and complete the verification process for any discrepancies.

{Auditor Memo}

Thank you,

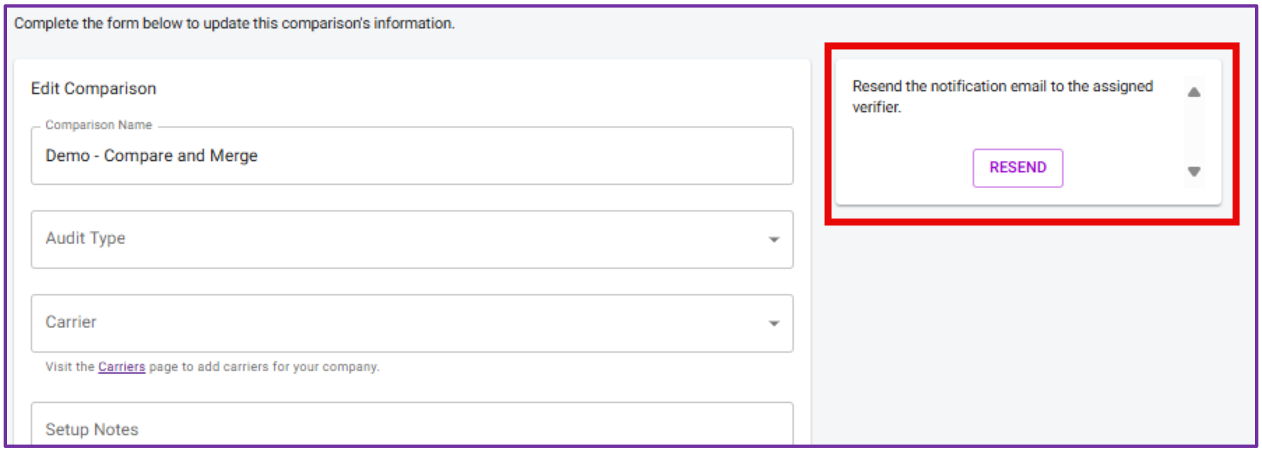
On behalf of {Auditor First Name and last Name}, {Organization Name if Org Level or Company Name if Company Level User}

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



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

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



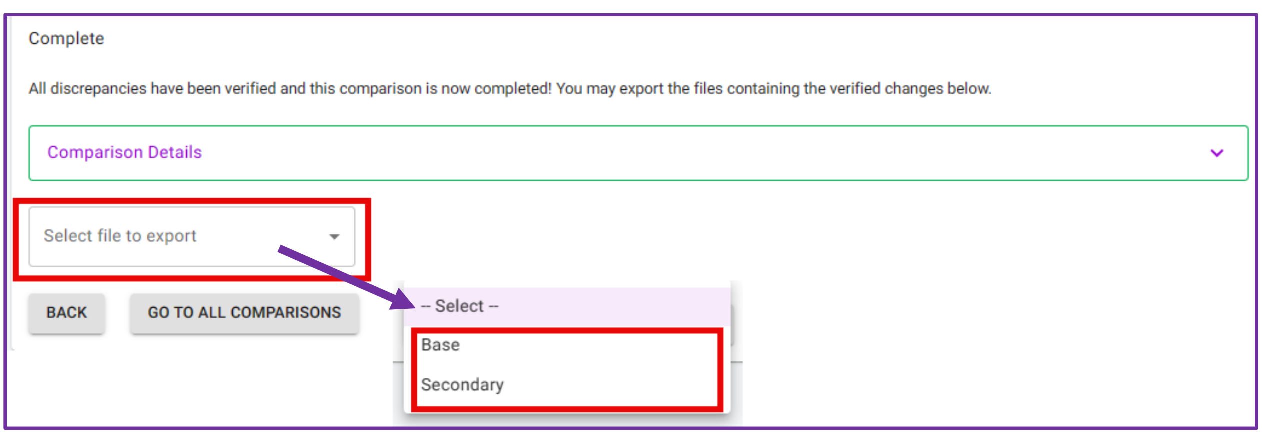
Complete the Compare

Data verification is complete.

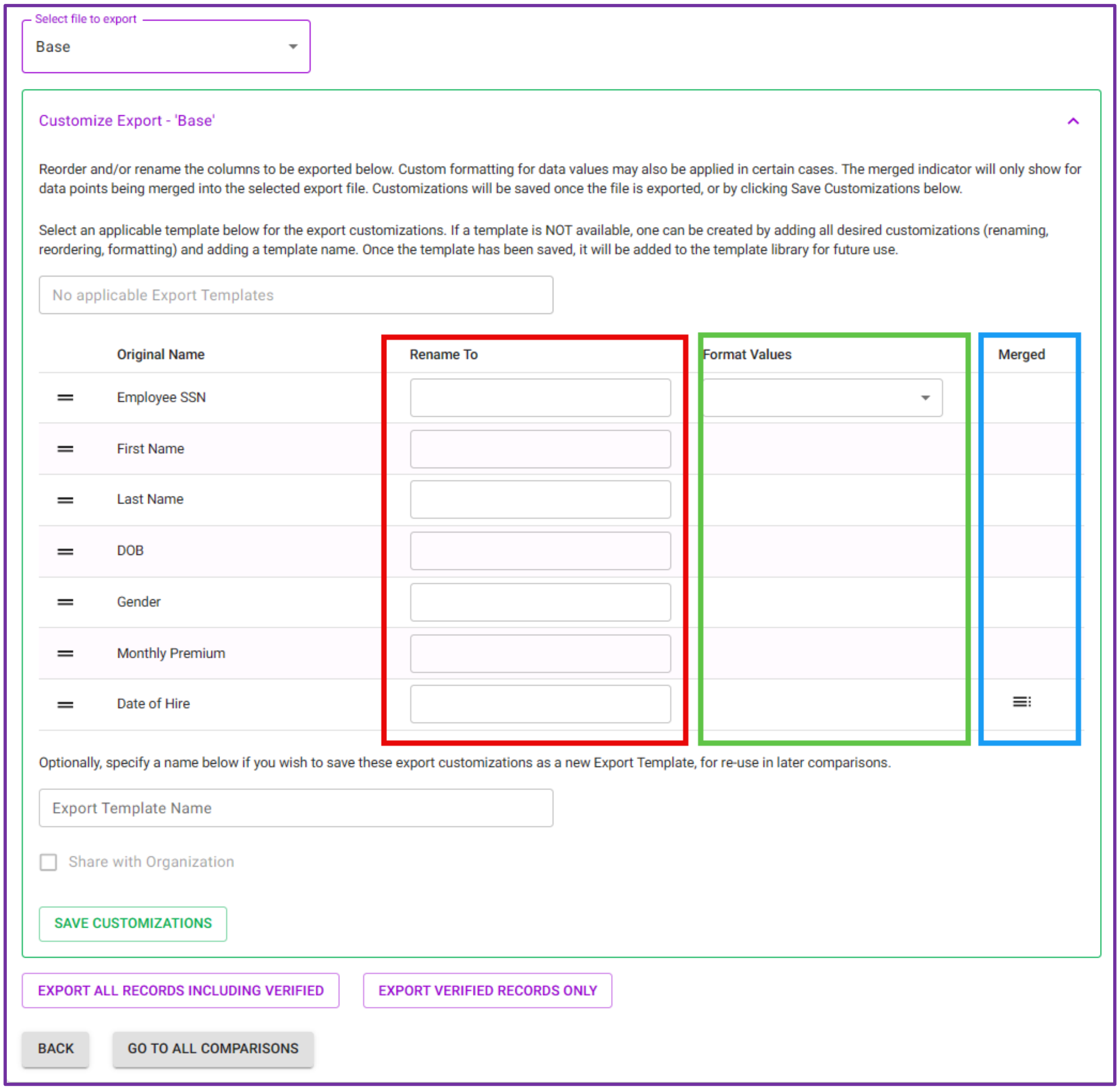
If the audit was assigned to a specific user within the application, the auditor will receive a notification email that the audit is complete.

> Hello {Auditor First Name},
>
> This is to inform you that the assigned verifier, {Verifier First Name and Last Name}, has finished verifying the discrepancies for your comparison: {Comparison Name} for {Company Name}.
>
> Please click here below to log in and complete the audit process.
>
> {Verifier Memo}
>
> Thank you,
>
> On behalf of {Verifier First Name and Last Name}, {Organization Name if Org Level or Company Name if Company Level User}
>
> This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

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

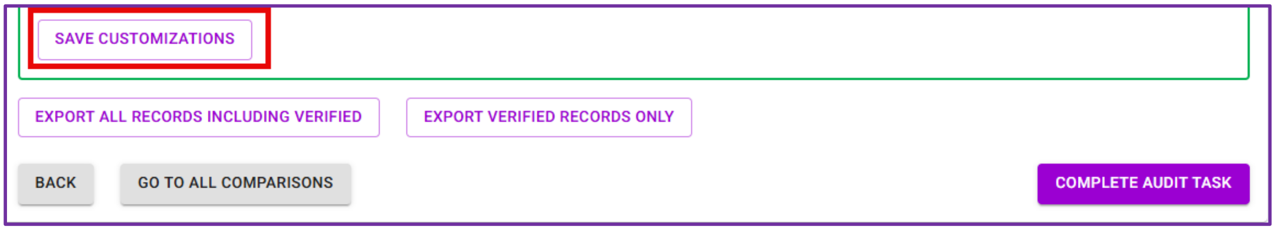


Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the application's key words. For a list of the keywords, please reference the Key Words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



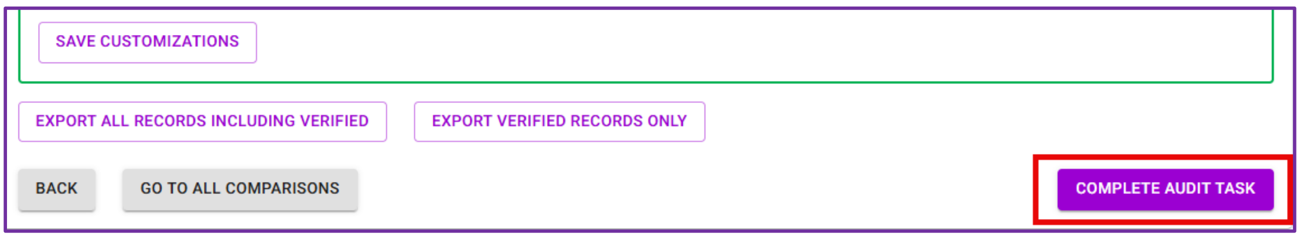
Column names can also be reordered by dragging and dropping data point in desired location.

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



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

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

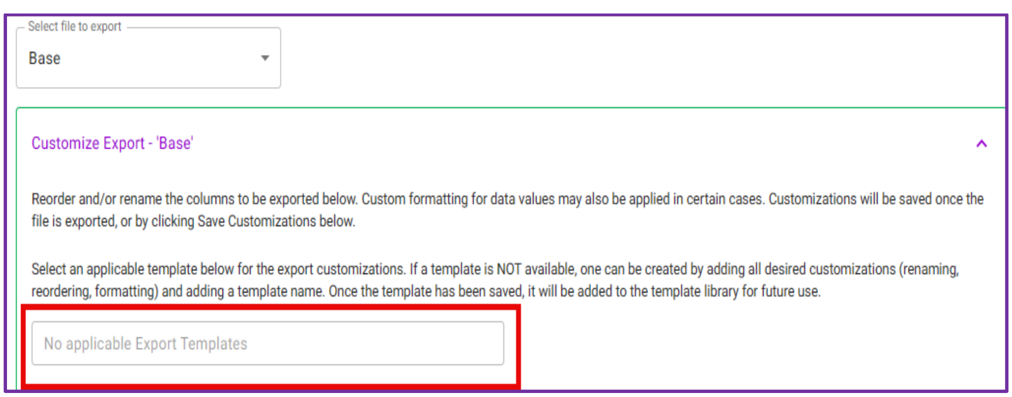


Export Template

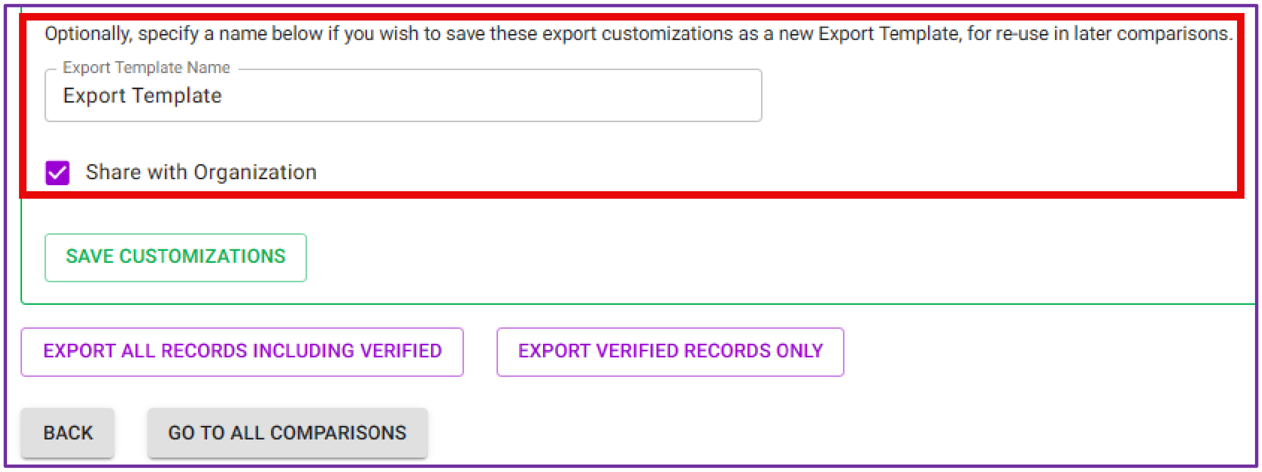
Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming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

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

Selecting export template:



Saving New Export Template:



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

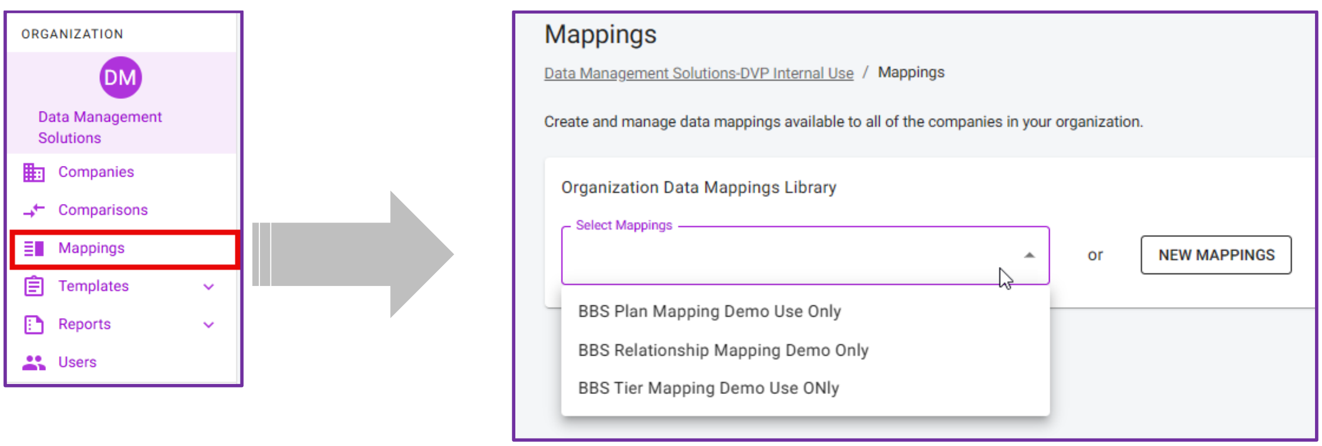
Questions: Contact Support@dms-datavalidate.com

Create Organization Level Mapping

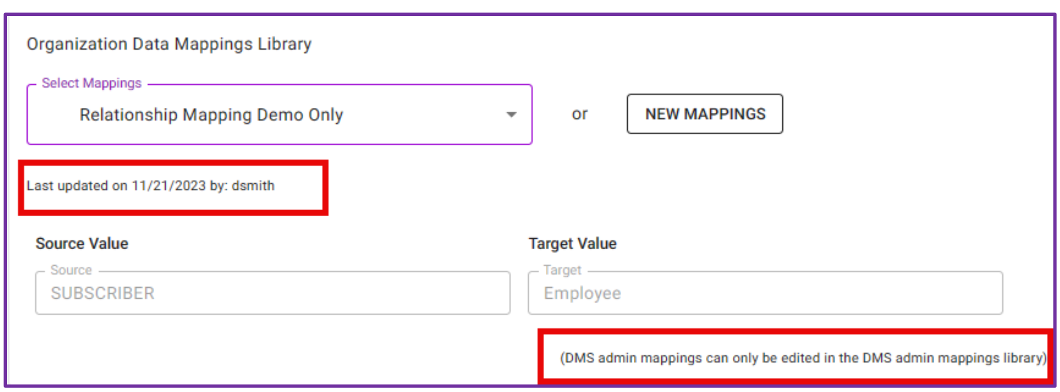
The Streamline application offers Organization Level mapping that can be used across multiple companies. This eliminates the need to create duplicate mappings such as coverage tier and relationship per company.

MAPPINGS under Organization Menu

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



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

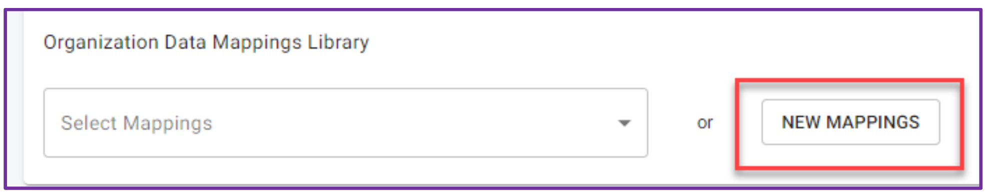


NEW MAPPINGS

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

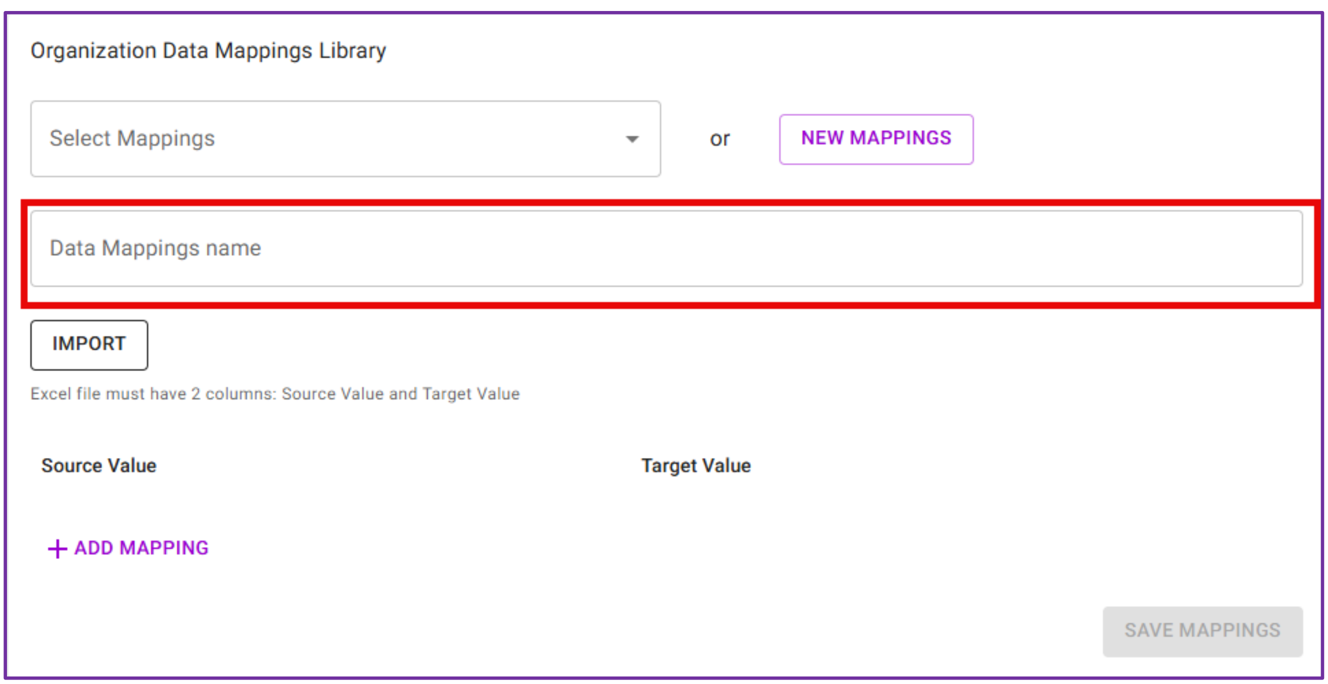
Mappings can be created several ways.

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



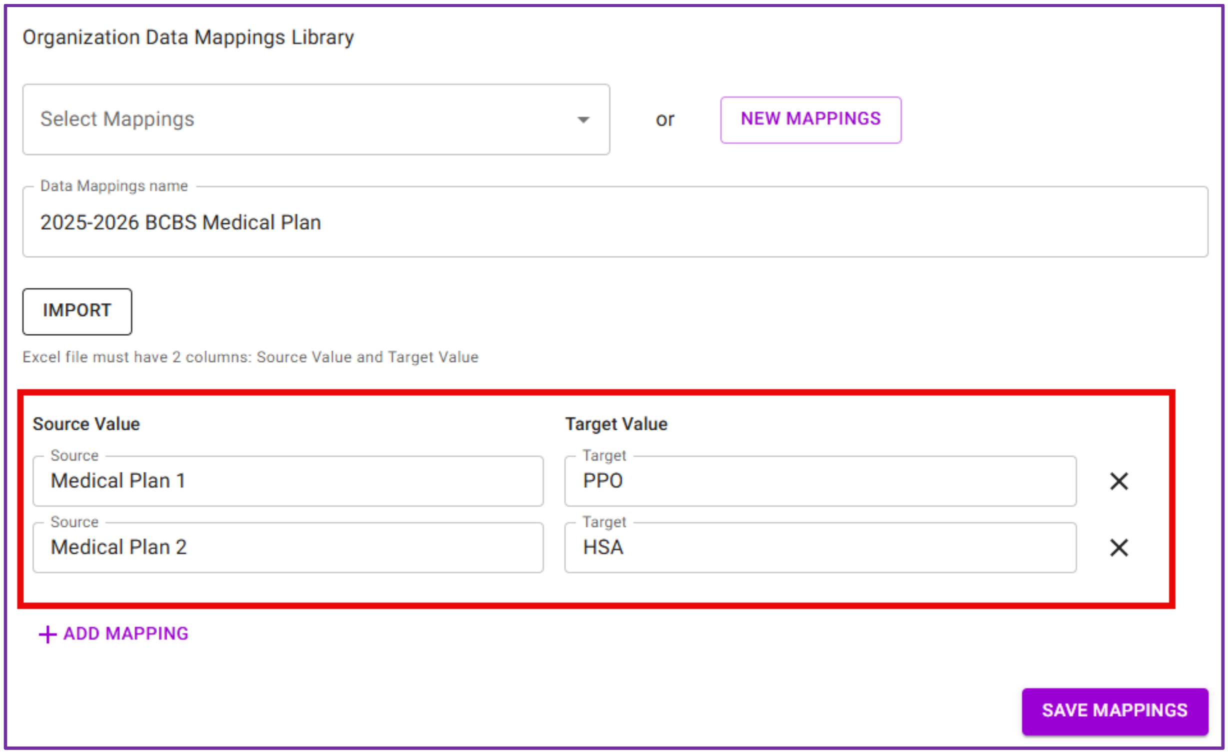
Name Mapping

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



Manually Create a Mapping

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



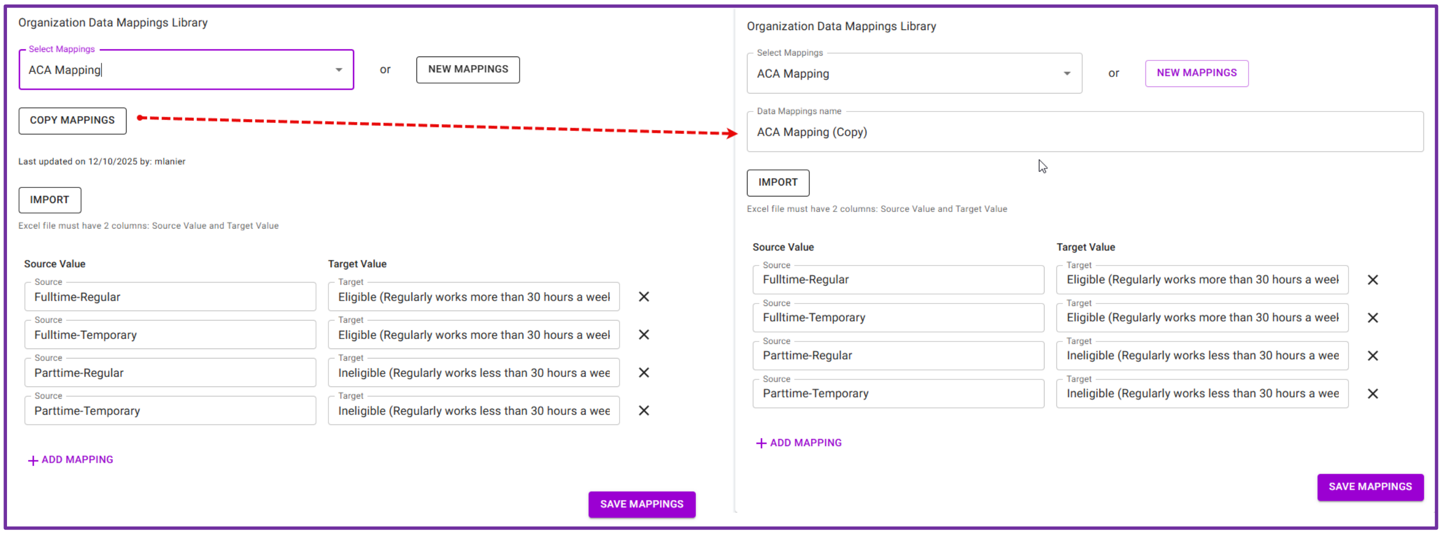
Import a Mapping

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

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

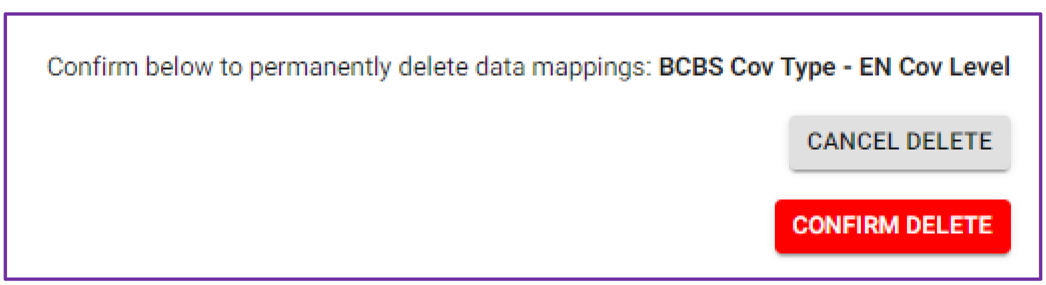
Copy and Modify an Existing Mapping

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

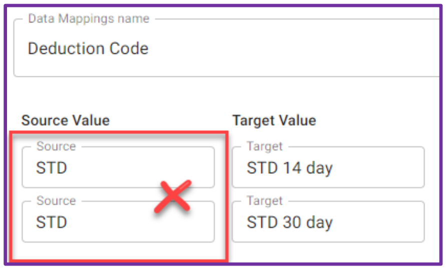


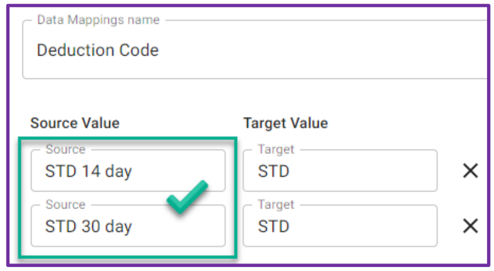
***If a mapping is currently in use, it cannot be deleted or edited.

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



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





Template Library

The Streamline application template library contains three individual libraries:

1. Data Points templates
2. Export templates
3. Email templates

Both data points and export templates can be created and re-used during a compare. These two templates are created at the company level but can be shared with the organization. To access the library, click on TEMPLATES under the company menu and then select the type of template.

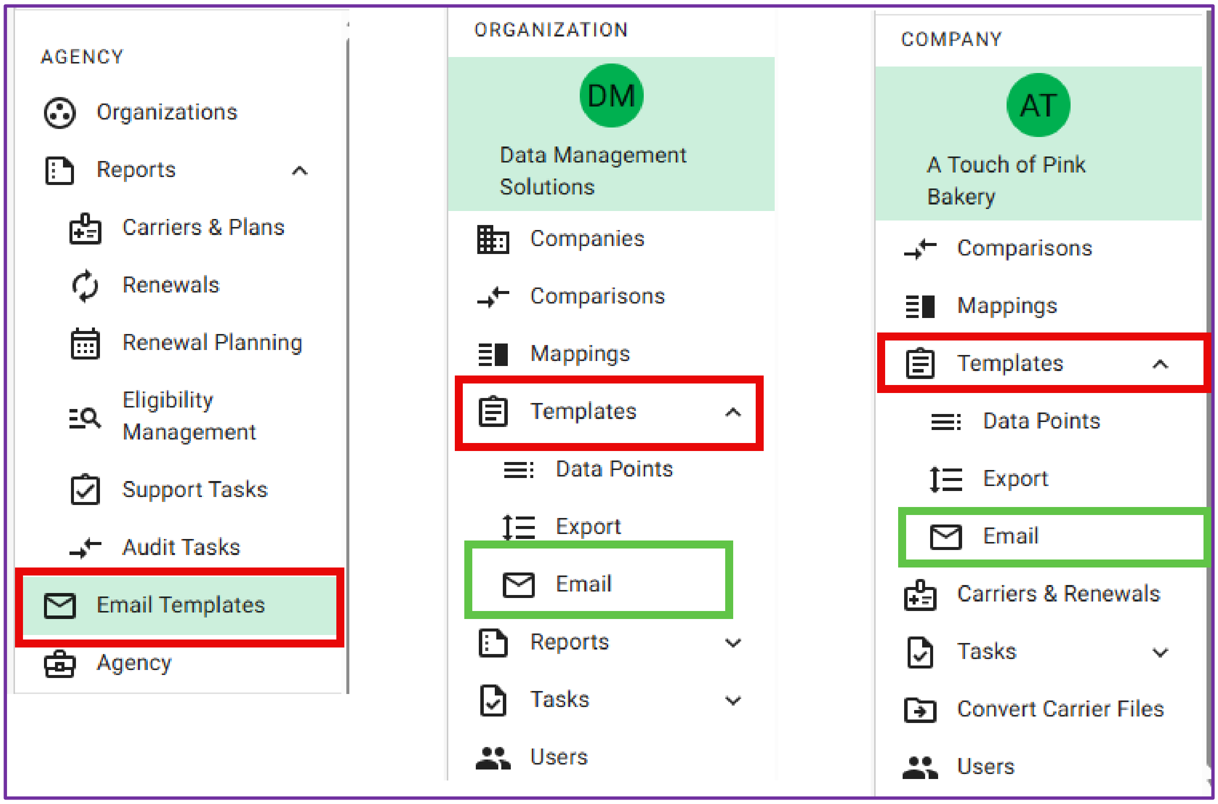
PLEASE NOTE: Any data point and export template shared with an organization and created by an organization administrator, or an organization compare user can be utilized under any company within that specific organization. Company admins which are available under our Platinum Elite subscription will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

The data points and export templates are not editable other than the name. However, they can be deleted. Please be aware that a deleted template cannot be recovered, and the deletion is permanent. If deleted in error, the template will need to be recreated during the compare.

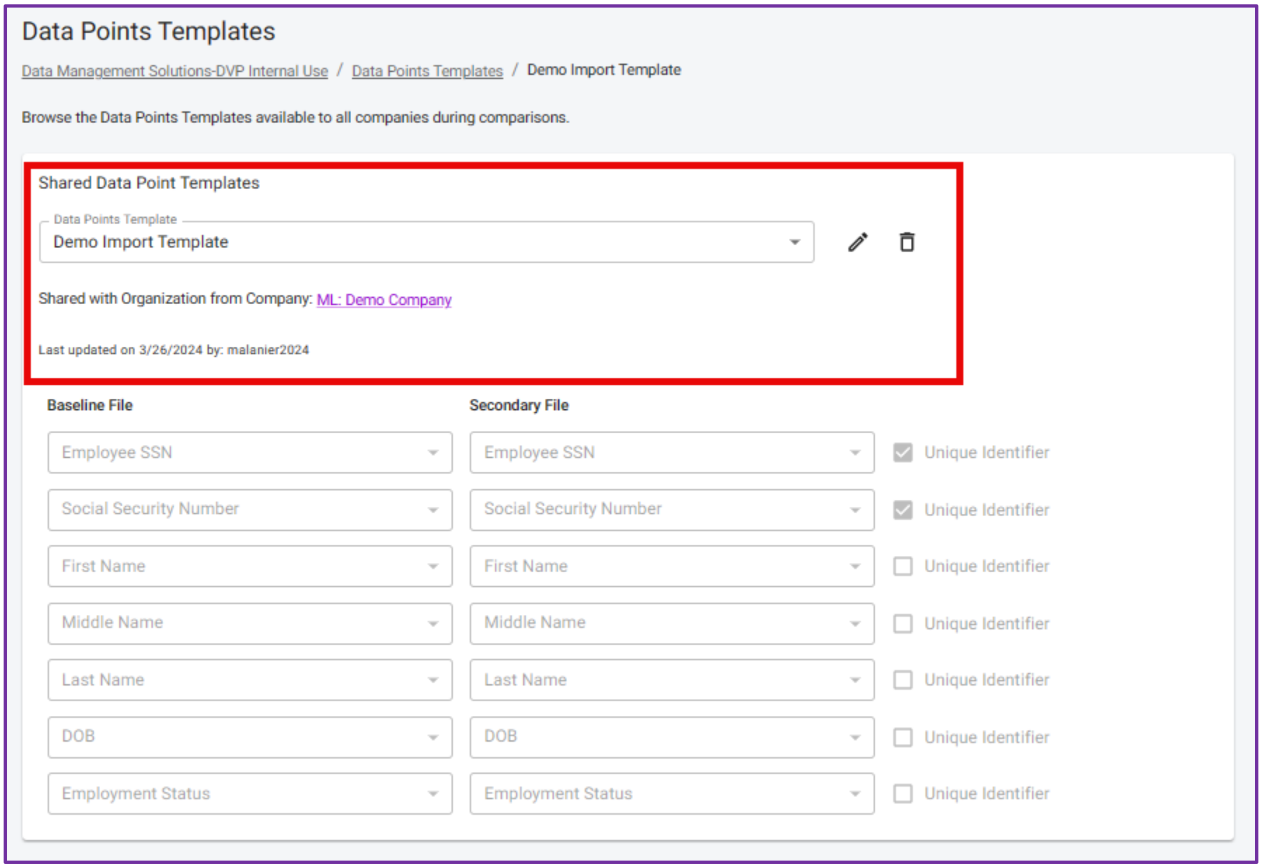
The email template library contains the default system generated emails for both the auditor and the verifier on both the organization and company levels. Please note that Email customization is only available on the Platinum Elite and Subscription Based Audits plans.

If customization is present the priority is

- Company-level templates take highest precedence
- Organization-level templates are used if no Company template exists
- Agency-level templates are used if neither Company nor Organization templates are available
- If no custom templates are configured, the system defaults to the standard system-generated template



A shared data point or export template will also contain the user who created/last updated the template as well as which company the template originated from.


Data Points Templates
Data Management Solutions-DVP Internal Use / Data Points Templates / Demo Import Template
Browse the Data Points Templates available to all companies during comparisons.
Shared Data Point Templates
Data Points Template
Demo Import Template
Shared with Organization from Company: ML: Demo Company
Last updated on 3/26/2024 by: malanier2024
Baseline File
Secondary File
Employee SSN
Employee SSN
Unique Identifier
Social Security Number
Social Security Number
Unique Identifier
First Name
First Name
Unique Identifier
Middle Name
Middle Name
Unique Identifier
Last Name
Last Name
Unique Identifier
DOB
DOB
Unique Identifier
Employment Status
Employment Status
Unique Identifier

Adding and Removing Companies

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

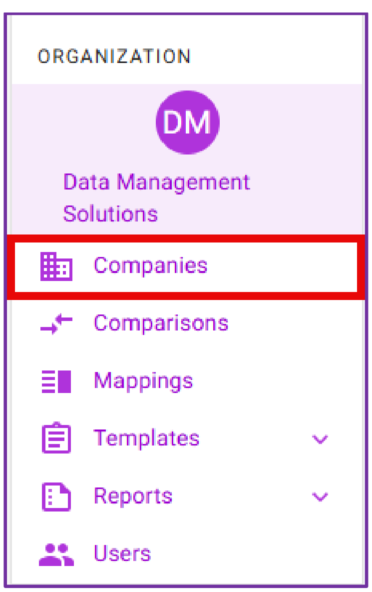
- Company name
- Active status
- Updated at timestamp
- Termination date and reason
- Activation date
- First demo date
- Any associated notes

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

Import Companies

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

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

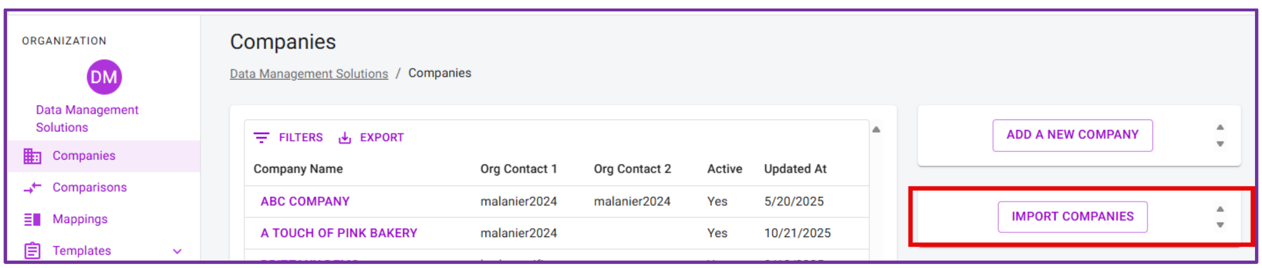


Using the provided import template, complete the following fields:

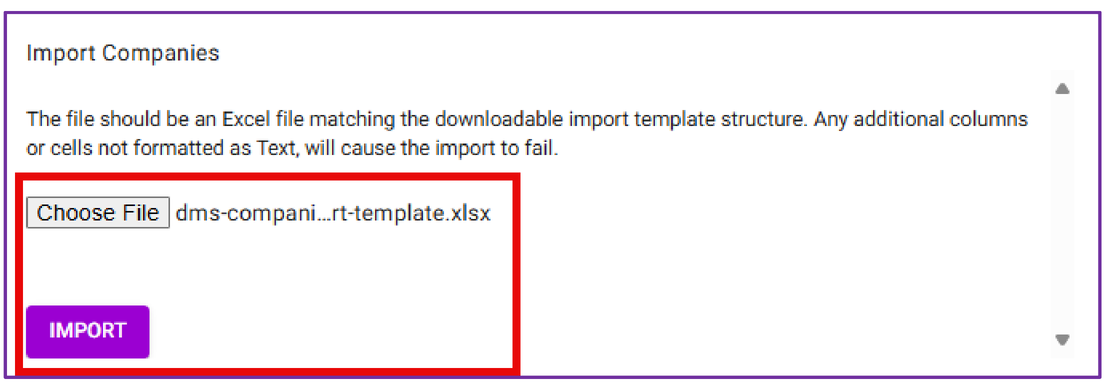
- Company name (Required)
- Notes (Optional)
- First demo date (Optional)
- Activation date (Optional - effective date of company in the application)
- Primary Organization Contact Username (Optional)
- Secondary Organization Contact Username (Optional)
- Organization Benefit Admin System (Optional)

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

Including any additional columns will cause the import to fail.

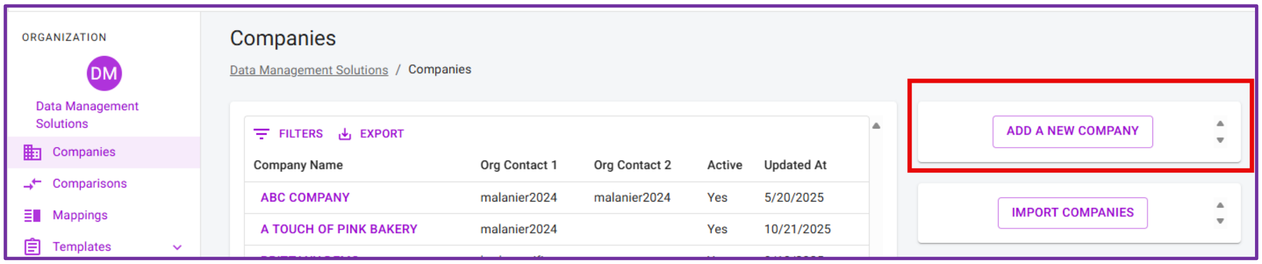


Choose file and click IMPORT.



Manually add a Company

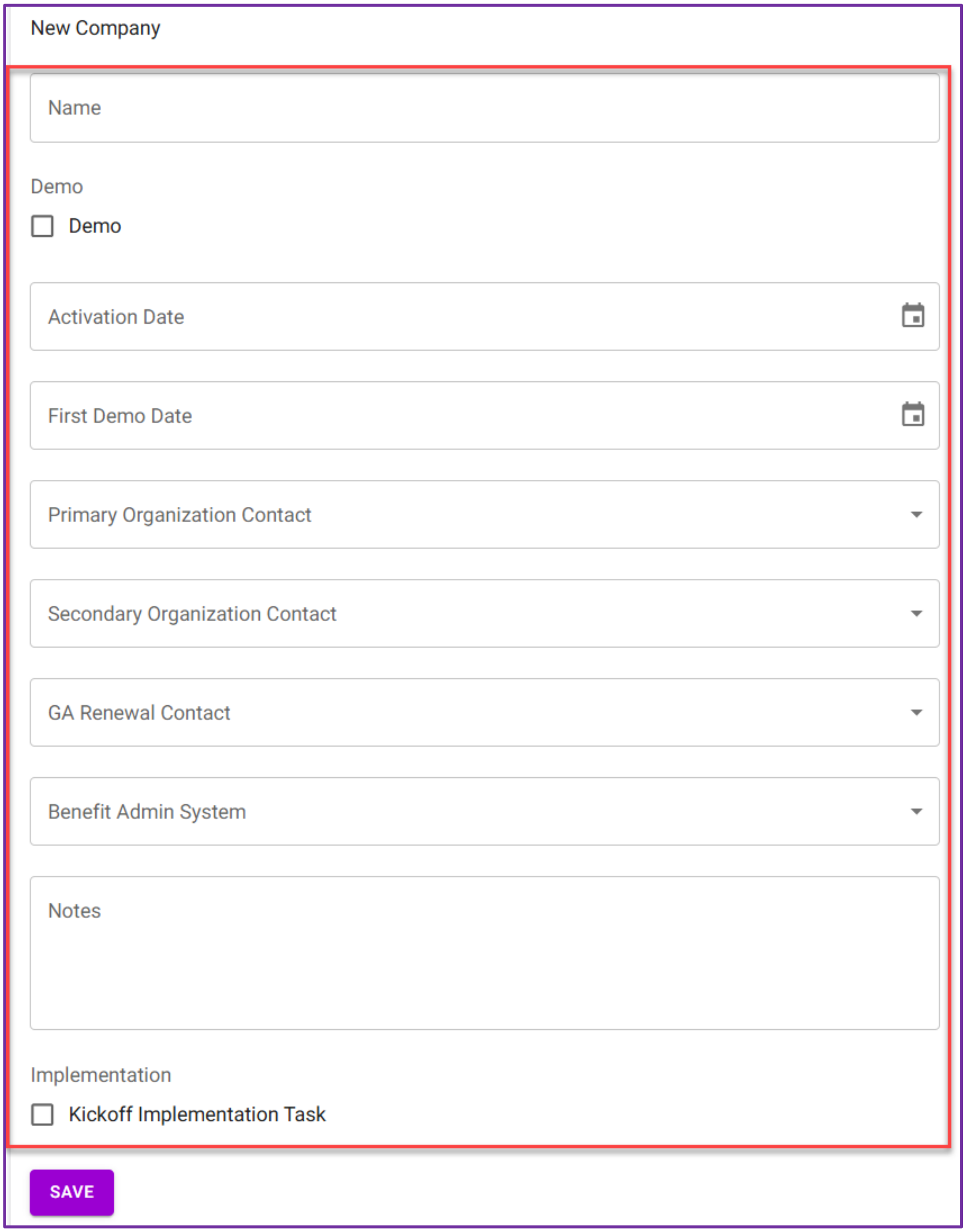
A company can be manually added to the application by clicking COMPANIES in the left-hand menu and then ADD A NEW COMPANY.



Add the following:

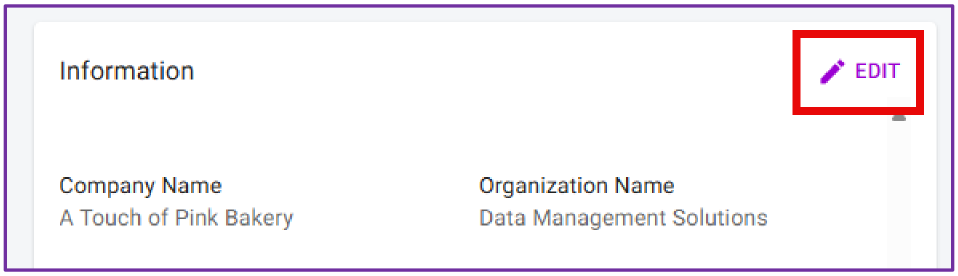
- Company name (Required)
- Demo - check if the company is a demo and to be excluded from exports.
- Activation date (Optional - effective date of company in application)
- First demo date (Optional)
- Primary Organization Contact (Optional – select from available dropdown. Only Admins and Comparers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

Once all information has been added, click SAVE.

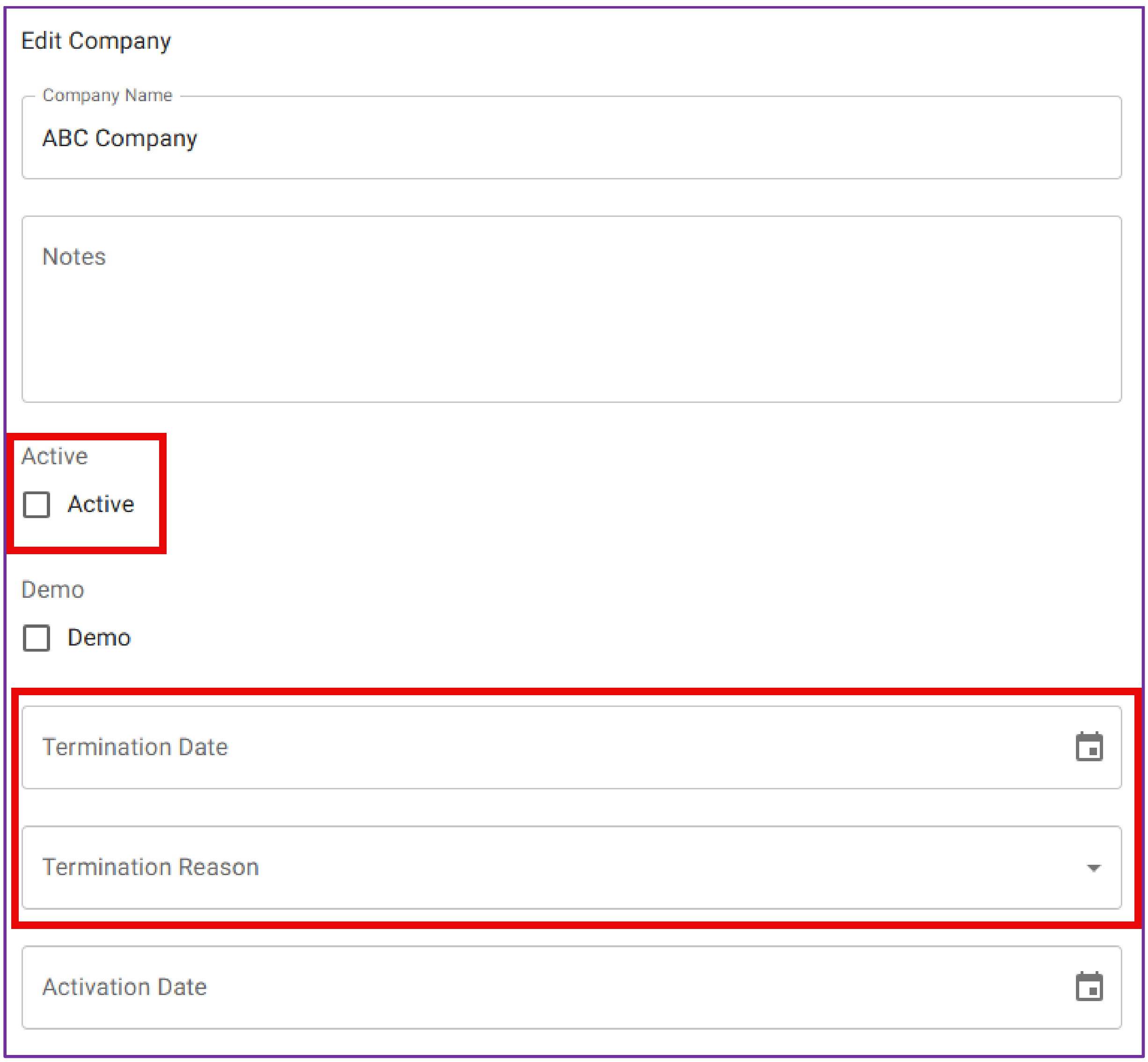


Deactivate a Company

To deactivate a company, click EDIT

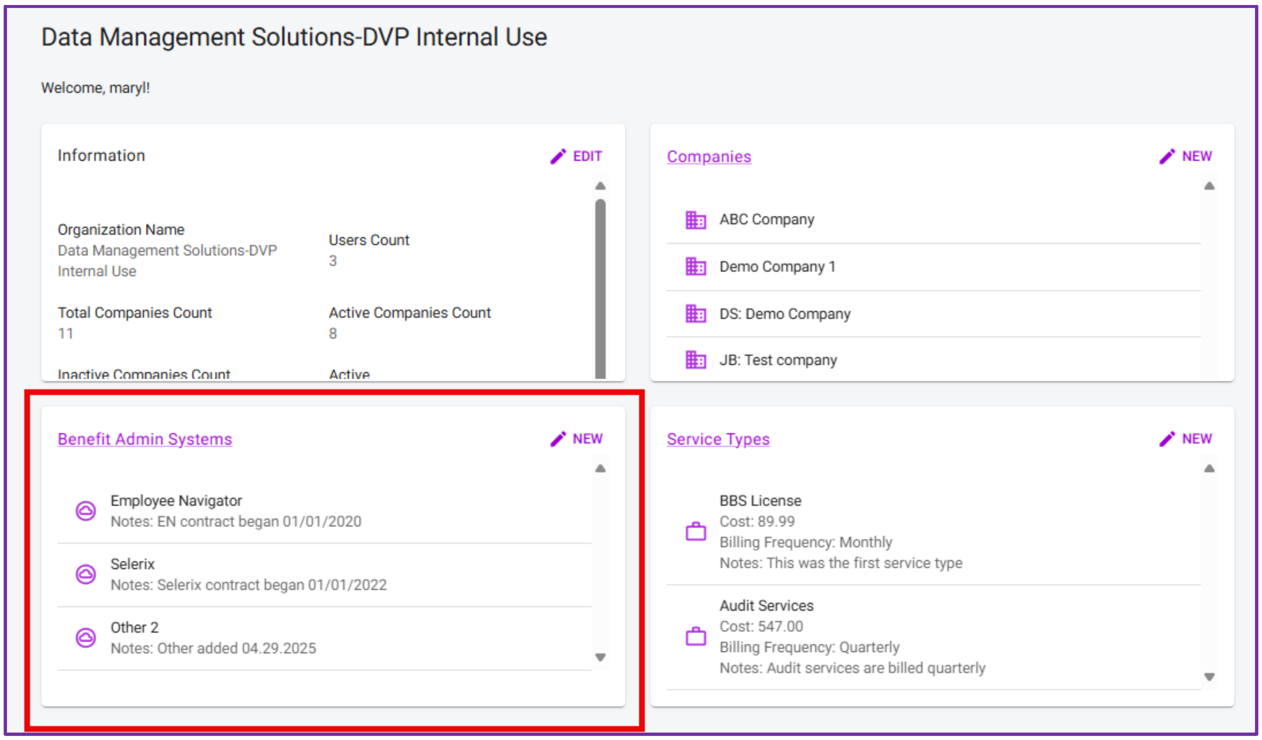


In the available screen, uncheck ACTIVE and enter a termination date and a termination reason for the deactivation. Click Save. Please note that the date has to be current or past. Future termination dates are not available.



Benefit Administration System Tracking

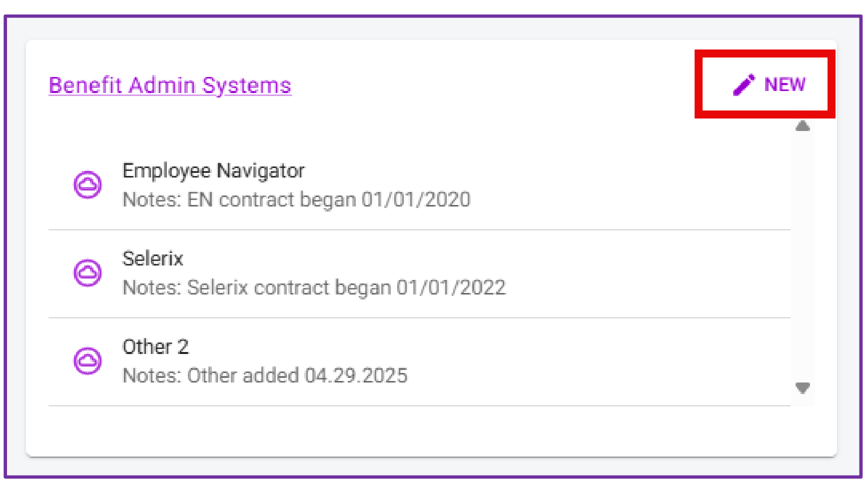
The Streamline application provides the option to track the benefit administration systems used for the organization which will then be available for selection at the Company Level. The tracking table is located on the Organization landing page.



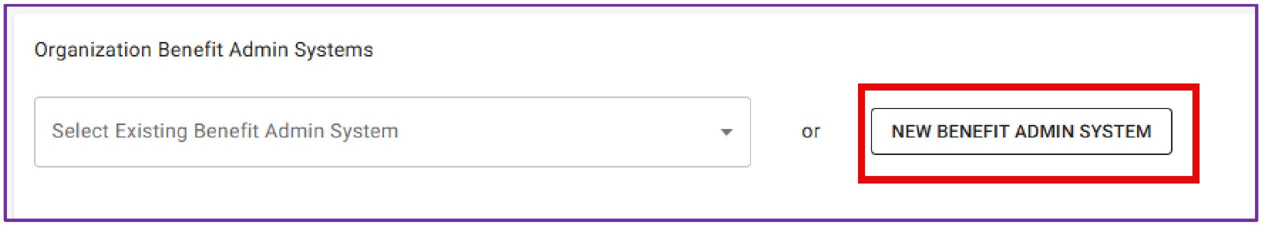
Add a Benefit Admin System

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

Click NEW

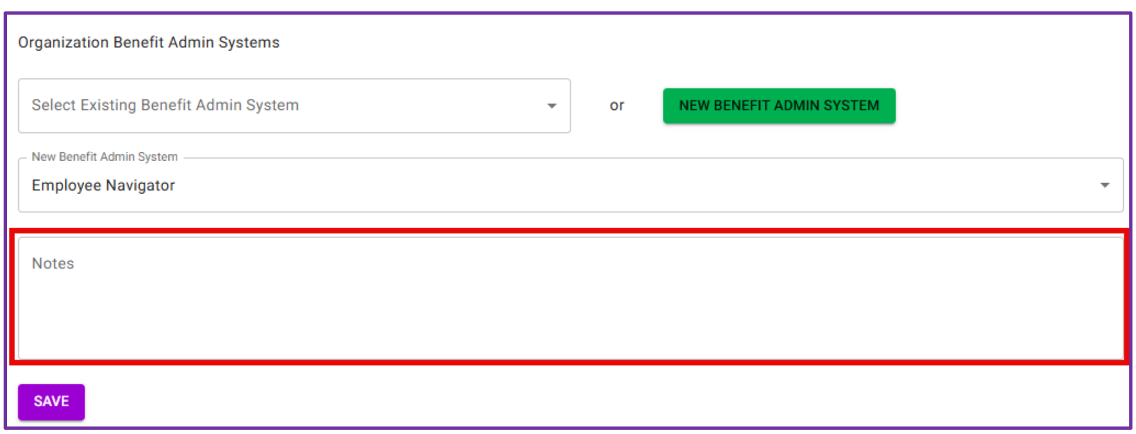


Click NEW BENEFIT ADMIN SYSTEM



Select the benefit admin system from the available dropdown.

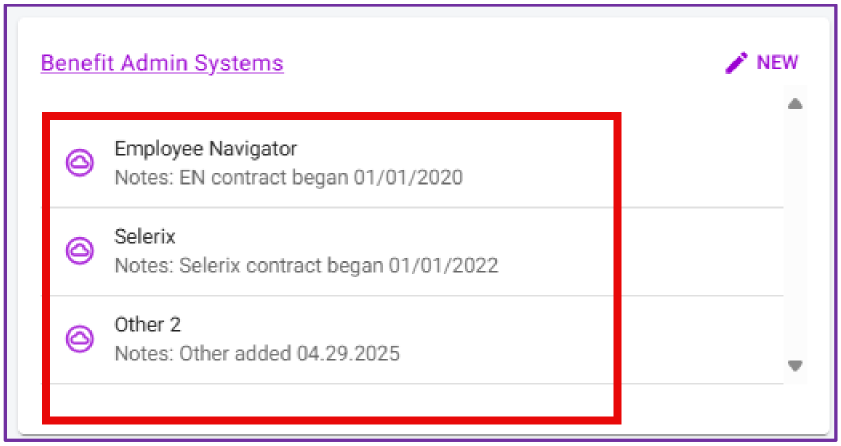
Add any notes pertaining to the system and click SAVE. This system is now available to be added to a Company.



Edit/Delete a Benefit Admin System

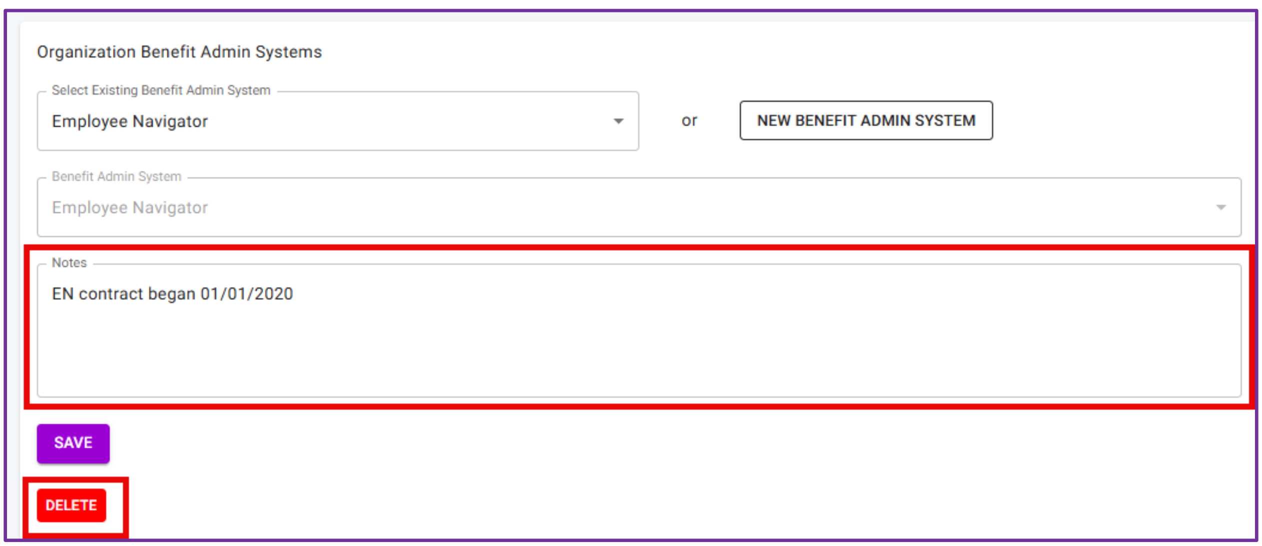
Navigate to the Organizations landing page

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



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

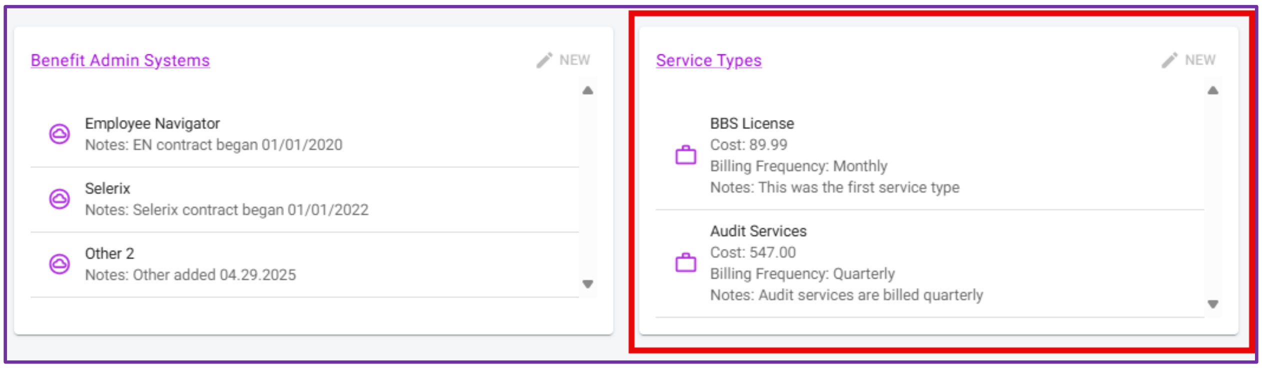
To delete the system from the Organization, simply click DELETE. However, please note that if the system is currently in use under a company, the system cannot be deleted. The system will need to be deleted from ALL companies in order to delete.



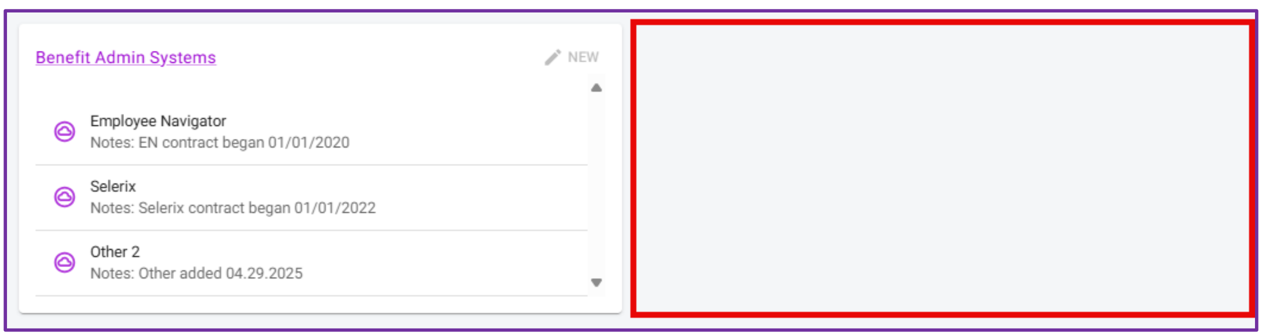
Service Type Tracking

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

Billing Contact:



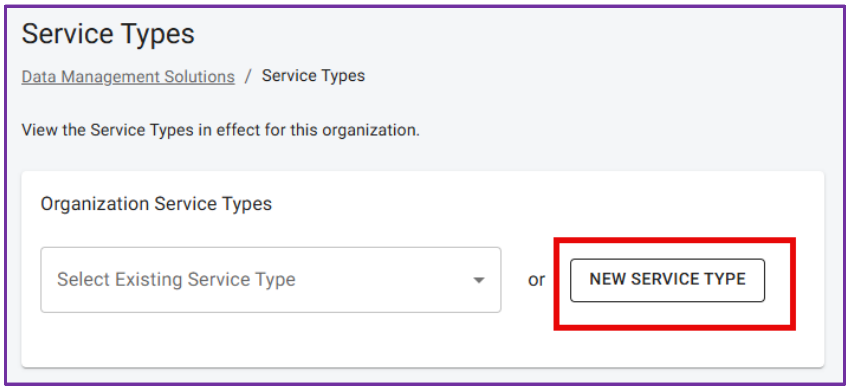
Non-Billing Contact:



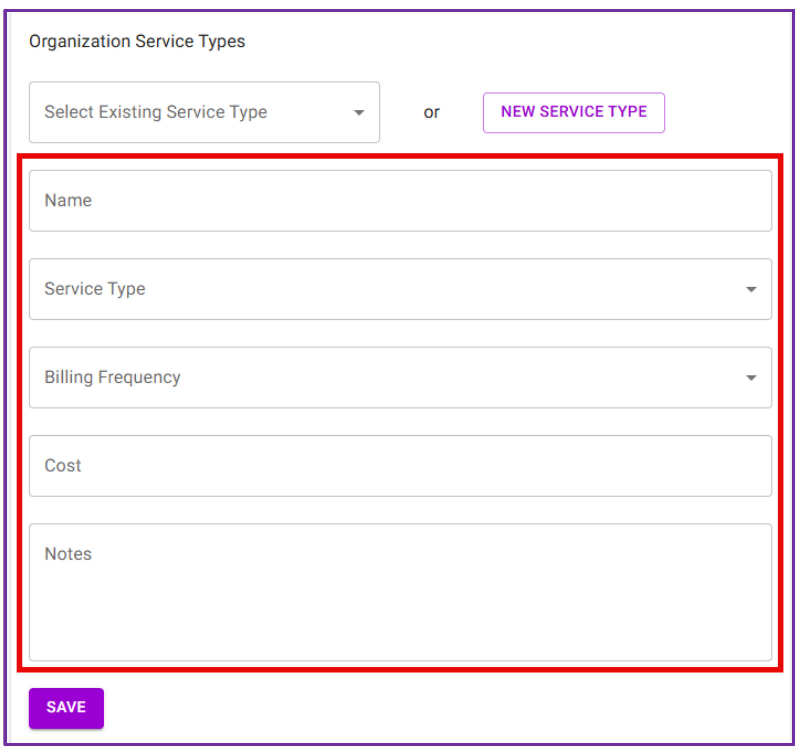
The Service Type Tracking and the designated Billing Contact is managed by the Agency and cannot be changed by an Organization user.

How to Add a Service Type

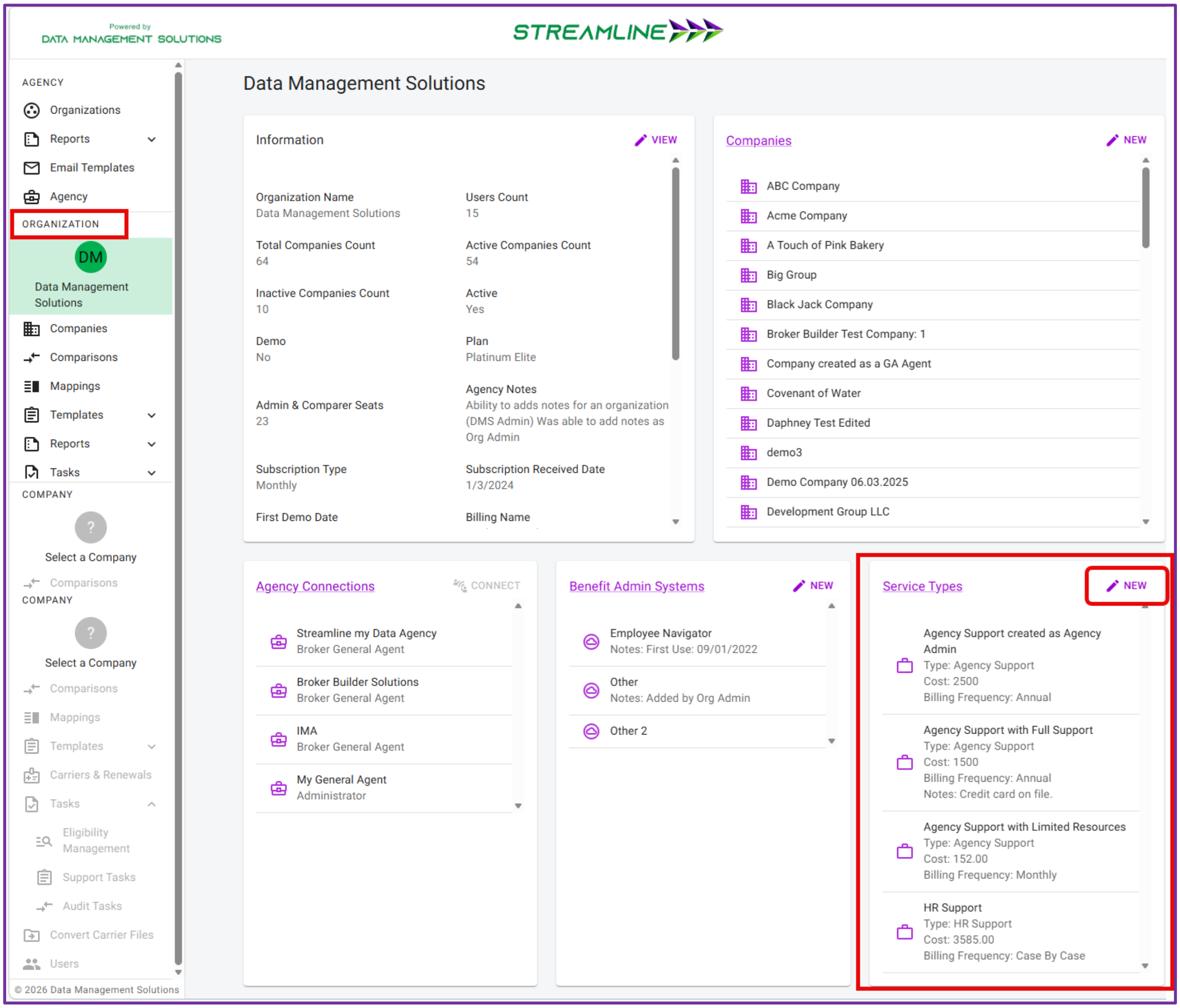
1. Navigate to the Organization to add a new service type to
2. Click NEW on the Service Type section
3. Click NEW SERVICE TYPE



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

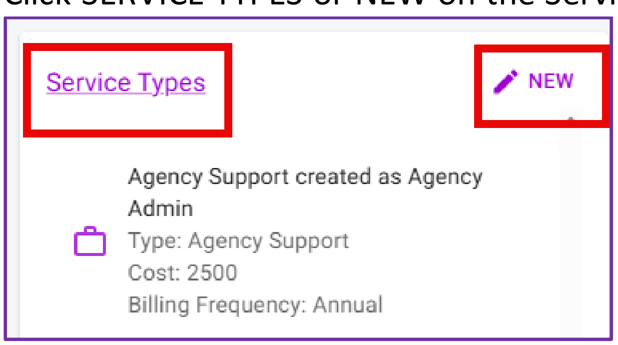


5. Click **SAVE** to create new service type.

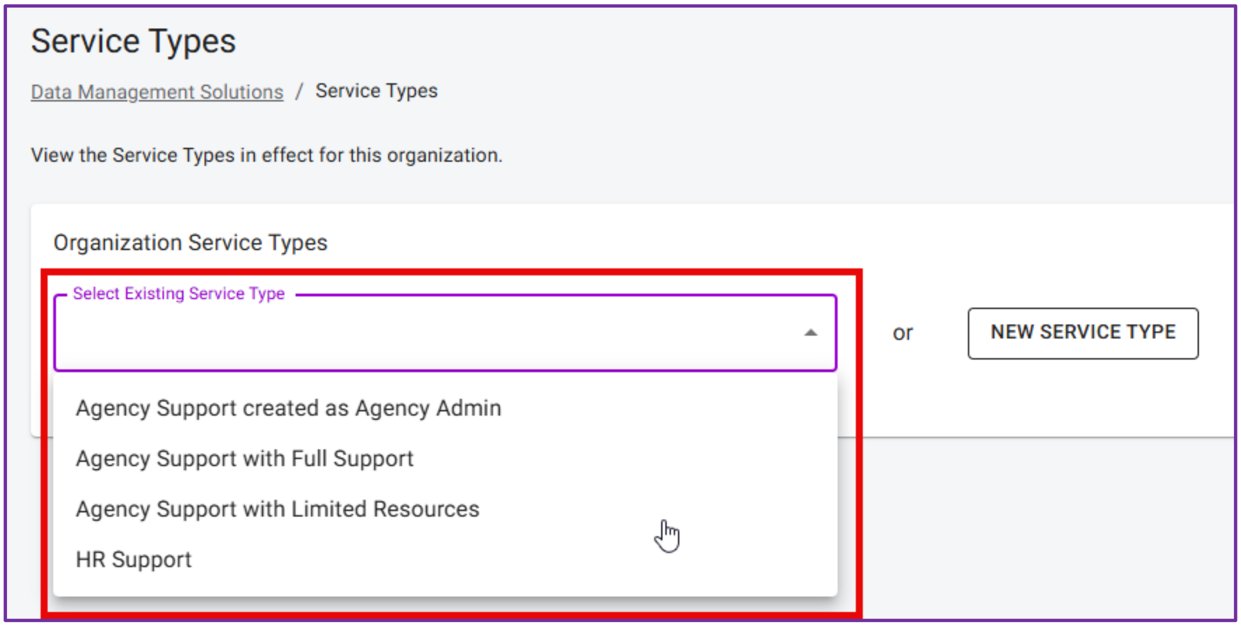


How to Edit/Delete a Service Type

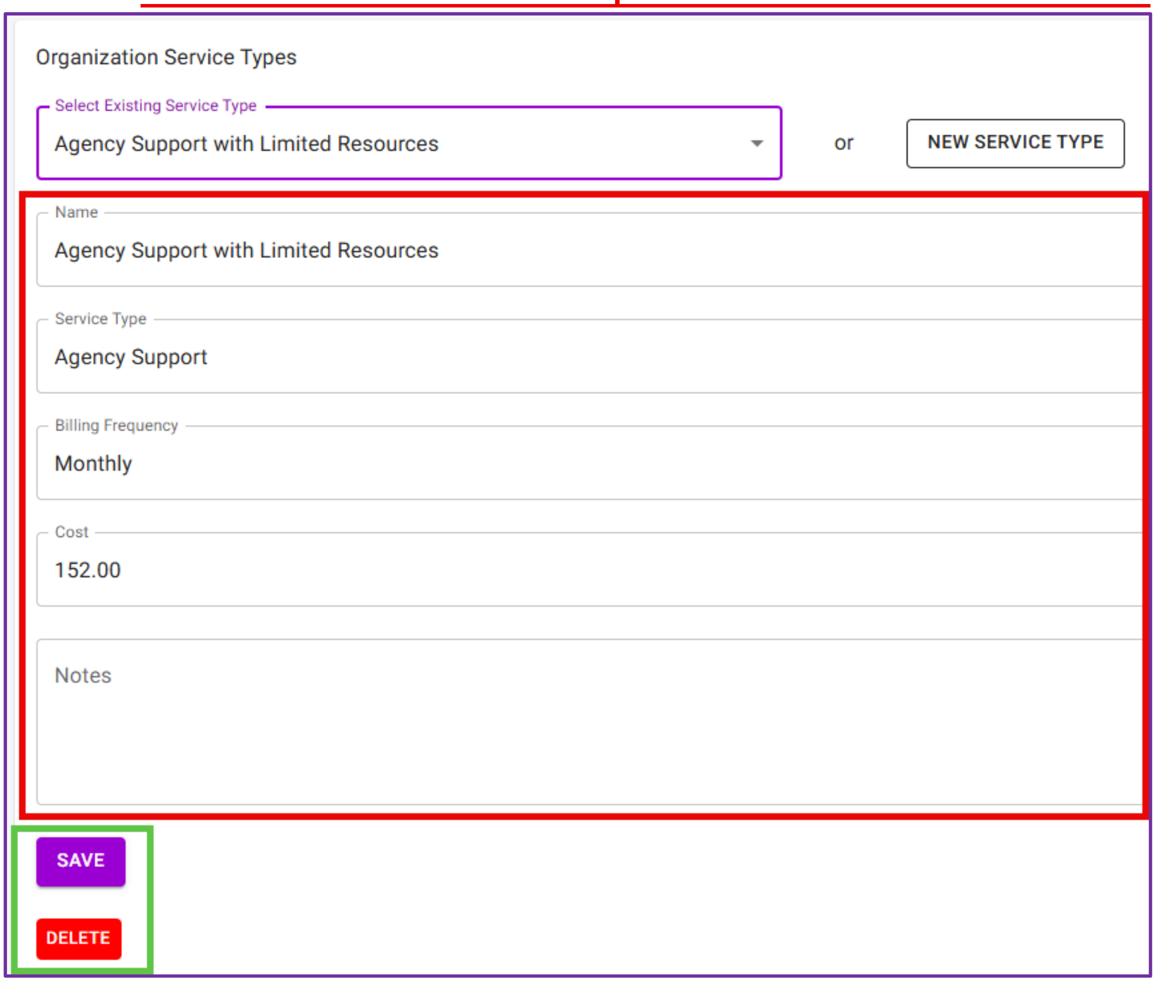
1. Navigate to the Organization to edit an existing service type.
2. Click SERVICE TYPES or NEW on the Service Type section



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



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



Carrier Tracking

The Streamline application provides the option to import or to manually add carrier information for a company. Using the provided template the following information can be imported into the application:

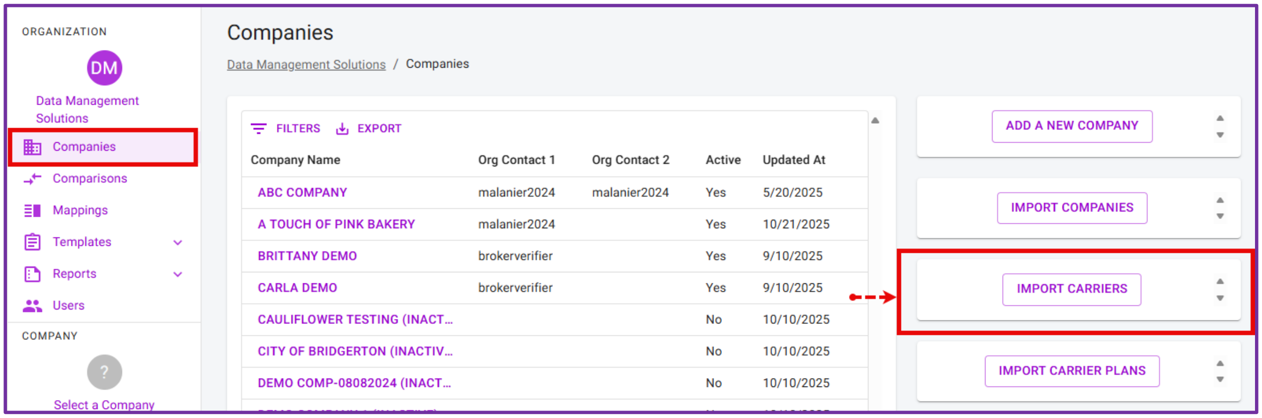
- Company Name (Required and must match company name in application)
- Carrier Name (Required and must match carrier name found in Import Template)
- Group Number (Required)
- Renewal Month (Required)
- Renewal Kickoff Days in Advance (Can choose between 30 to 90 days)
- Carrier Invoice Day of Month (Optional)
- Eligibility Management Type **(Optional – However, it is a best practice to complete this field. Certain task types require this information to be populated.)**
- Commission Type (Optional)
- Commission (Optional but required if Commission Type selected)
- Carrier Inception Date (Optional)
- Carrier End Date (Optional)
- Disable Renewals (Optional Checkbox)
- Carrier Contact Name (Optional)
- Carrier Contact Email (Optional)
- Carrier Contact Phone Number (Optional)
- Notes (Optional)
- Secondary Carrier Contact Name (Optional)
- Secondary Carrier Contact Email (Optional)
- Secondary Carrier Contact Phone Number (Optional)
- Audit Service (Optional Checkbox)
- Organization Eligibility Contact (Optional – select from available dropdown)
- Organization Audit Contact (Optional – select from available dropdown)

Carrier Information can only be imported under the organization but can be manually added under on the Company level.

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

Import Carriers

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

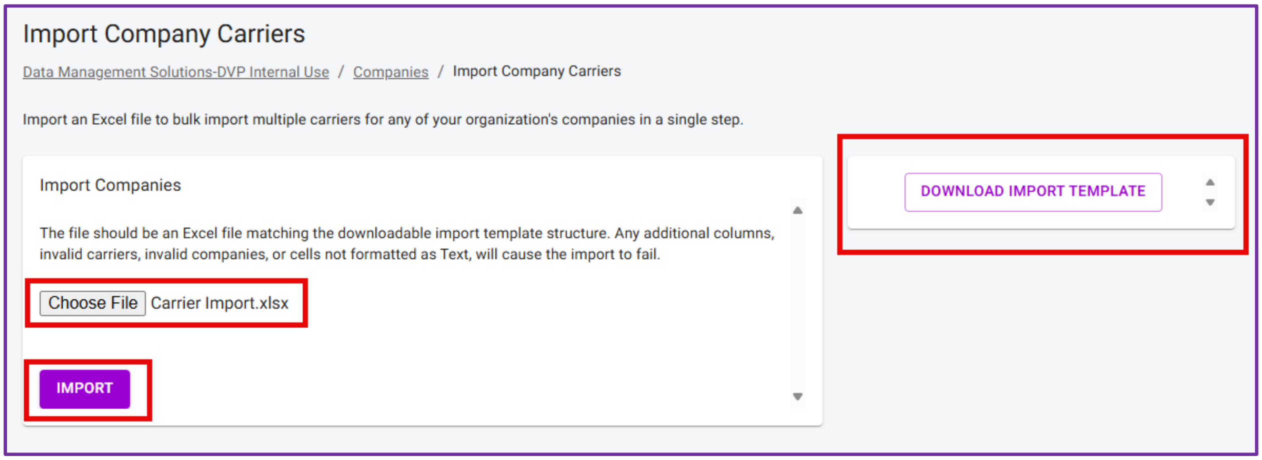


Using the provided import template, complete all required fields:

- Company Name: The company name must match the company name that is currently in the application. If the name does not match, the application will not be able to add the carrier information. (Required)
- Carrier Name: The available carriers are provided on a separate reference tab (Carriers(reference)) in the import template. If a desired carrier is not listed, a request can be made to add through our enhancement request form: [Enhancement Request Form - DMS Data Validate (dms-datavalidate.com)] (Required)
- Group Number: This is a free-from field for the Group Number assigned to the Company by the carrier. (Optional).
- Renewal Month (Required)
- Renewal Kickoff Days In Advance (Optional)
- Carrier Invoice Day Of Month (Optional)
- Eligibility Management Type (Optional – However, it is a best practice to complete this field. Certain task types require this information to be populated.)
- Commission Type (Optional)
- Commission (Optional but required if Commission Type selected)
- Carrier Inception Date (Optional)
- Carrier End Date (Optional)
- Disable Renewals (Optional)
- Carrier Contact Name (Optional)
- Carrier Contact Email (Optional)
- Carrier Contact Phone Number (Optional)
- Notes (Optional)
- Secondary Carrier Contact Name (Optional)
- Secondary Carrier Contact Email (Optional)
- Secondary Carrier Contact Phone Number (Optional)
- Audit Service (Optional)
- Organization Eligibility Contact Username (Optional)

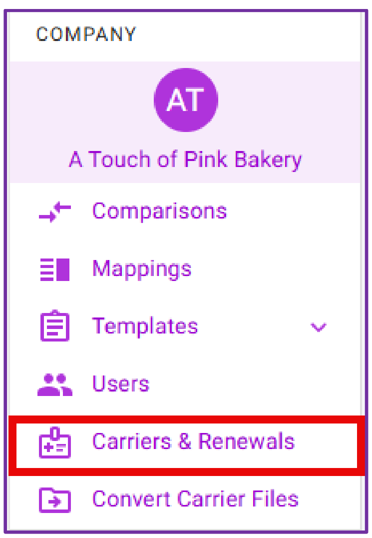
- Organization Audit Contact Username (Optional)

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

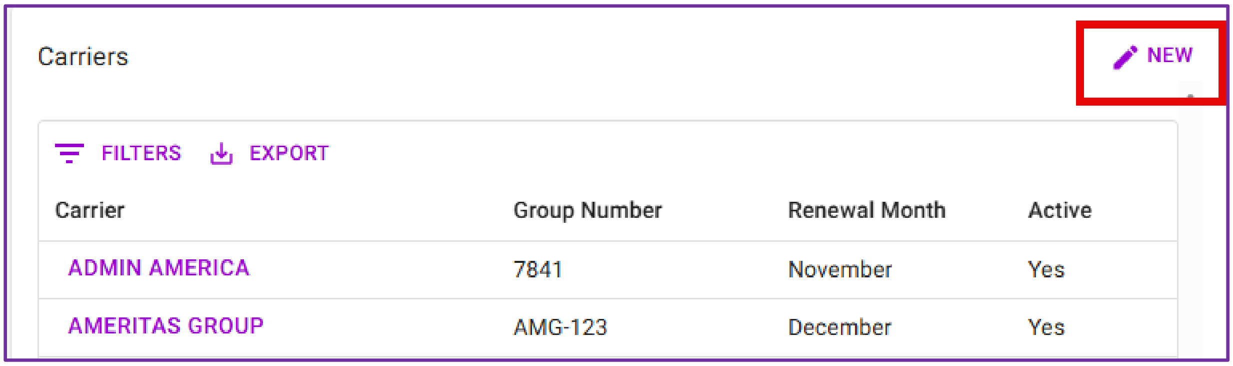


Manually add Carriers

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



Click NEW



Complete all required fields highlighted in red and any optional fields highlighted in yellow, if applicable. Click SAVE once all information has been added.

Once a carrier has been added to the company carrier library, it can then be selected during the audit creation process or updated at a later date.

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

Commission Type

Commission

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

GA Eligibility Contact

GA 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)
- Commission Type (If Type was added at Carrier Level, it will default to the Plan level. However, this field can be overwritten at the plan level)
- Commission (Optional but required if Commission Type selected)
- Disable Renewals (Optional Checkbox)
- Notes (Optional)

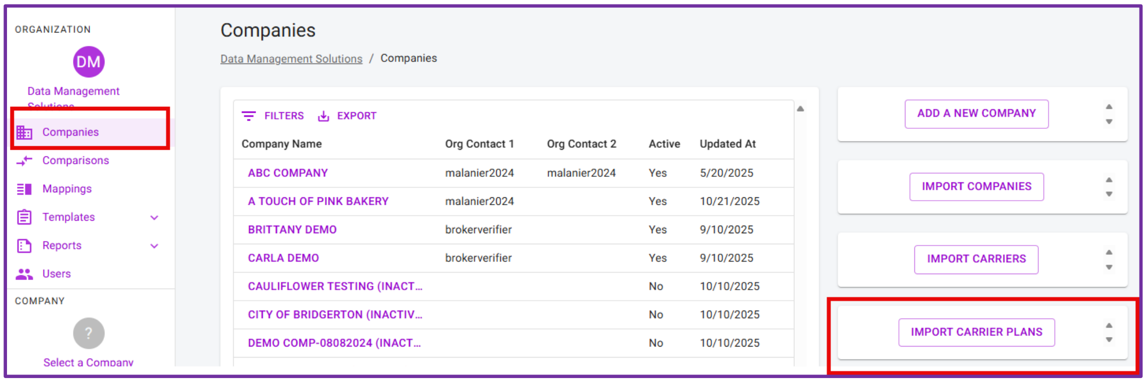
Carrier plan information tracking, however, is only available through the Platinum Elite or Subscription Based Audits subscription plans.

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)
- Commission Type (Optional)
- Commission
- Disable Renewals (Optional)
- Notes (Optional)

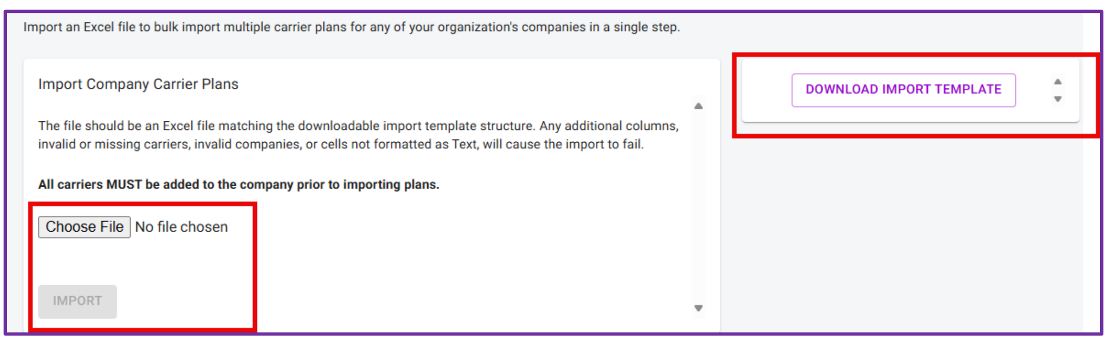
The Import Carriers button can be found on the Organization level under the Companies page.



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

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

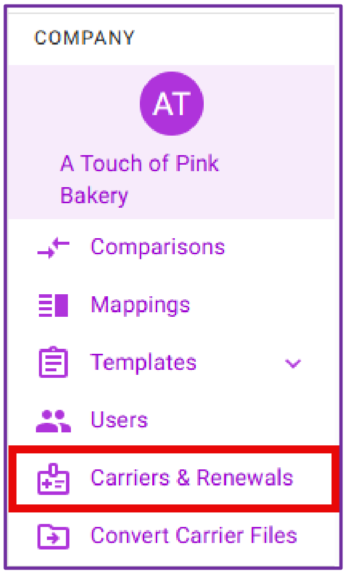
The completed template can then be selected using the Choose File button and then IMPORT.



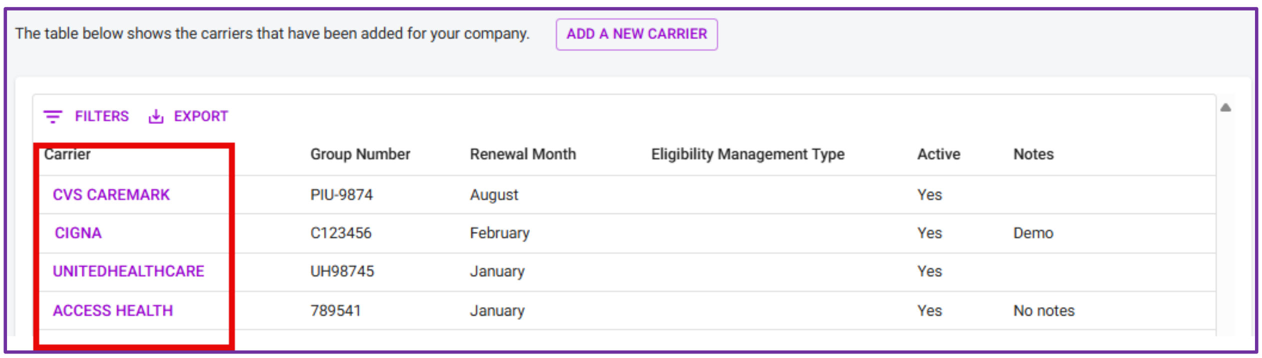
Carriers must be added to each company before importing plans. You may also import multiple plans across multiple carriers and companies in a single import

Manually Add Plan

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



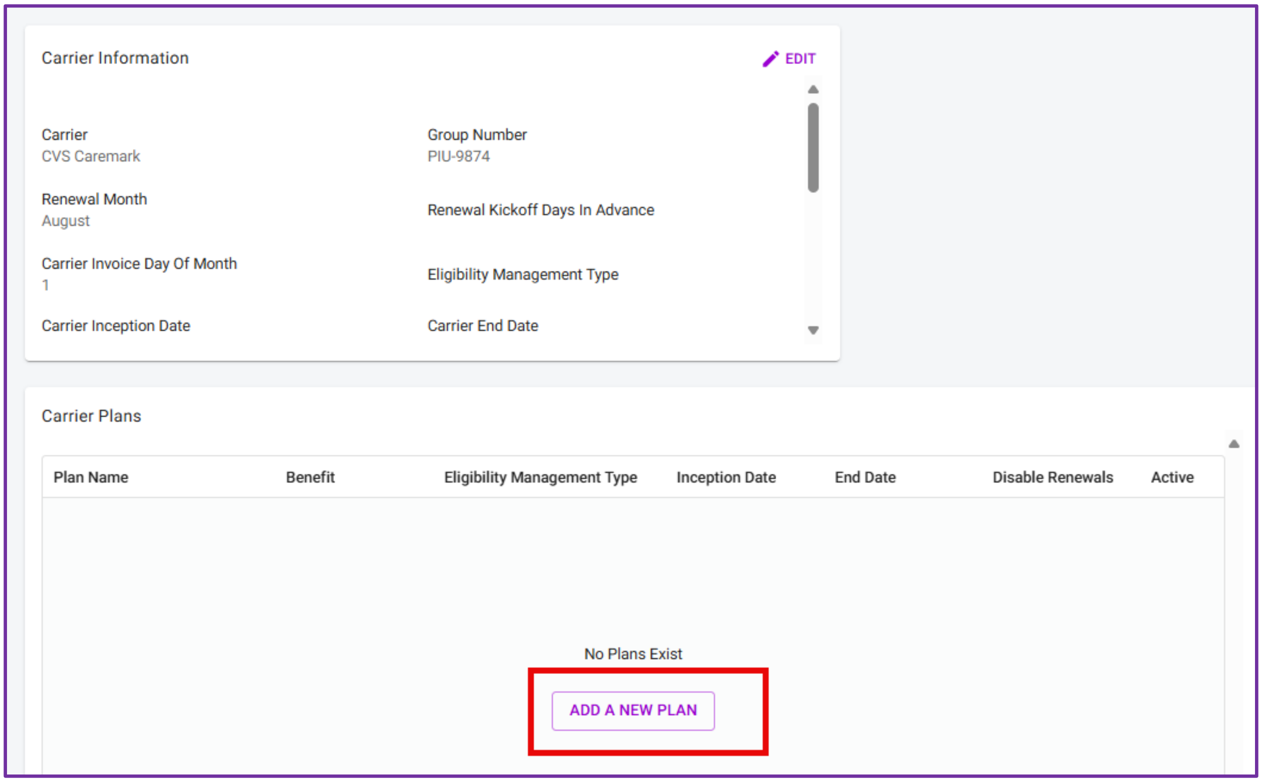
Select the carrier that you would like to add a plan to. Please note that the carrier has to be added prior to adding a plan.

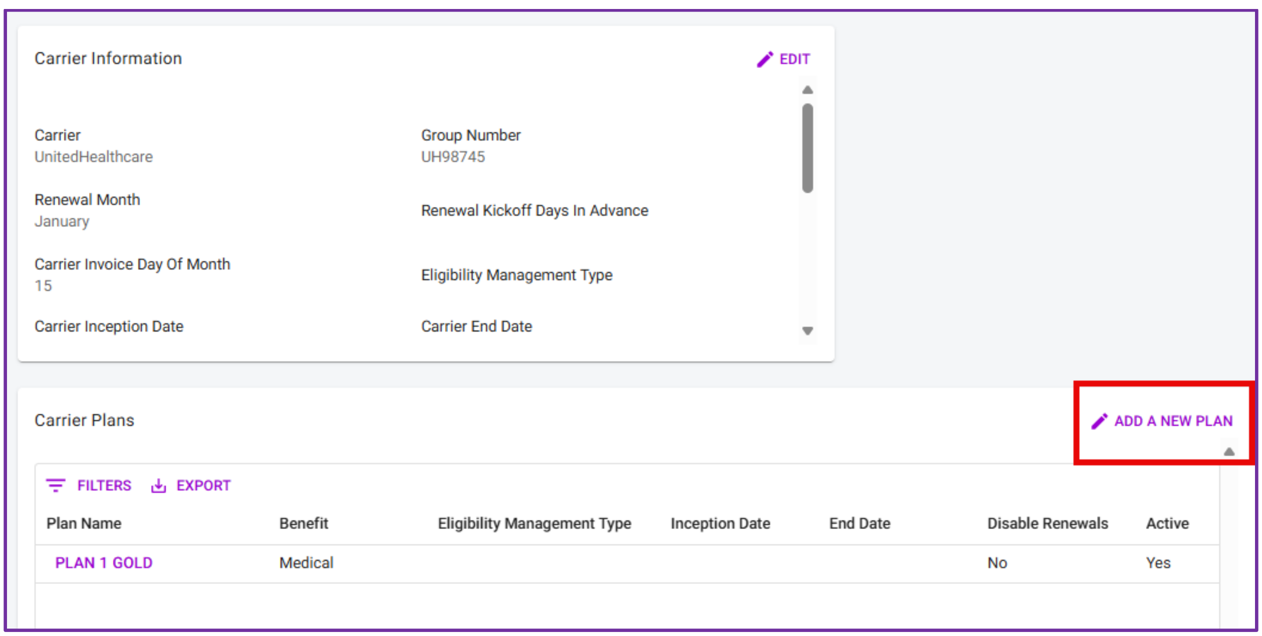

The table below shows the carriers that have been added for your company. ADD A NEW CARRIER

FILTERS EXPORT

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

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





Complete all required fields highlighted in red and any optional fields highlighted in yellow, if applicable. The fields highlighted in Green are for Agency use only and are not editable to the organization user. Click SAVE once all information has been added.

New Plan

Carrier
Guardian

Plan Name

Benefit Type

Group Number

Using Carrier Group Number: GP-4785

Eligibility Management Type

Using Carrier Eligibility Management Type: Agency Managed DEX

Commission Type

Commission

Disable Renewals

☐ Disable Renewals

Number of Eligible

Number of Enrolled

GA Eligibility Contact

GA Audit Contact

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
Migration Task Assignment
Migration Task Complete
Migration Task Kickoff
Migration Task Kickoff Follow Up
Support Task Assignment
Support Task Complete

Key Features:

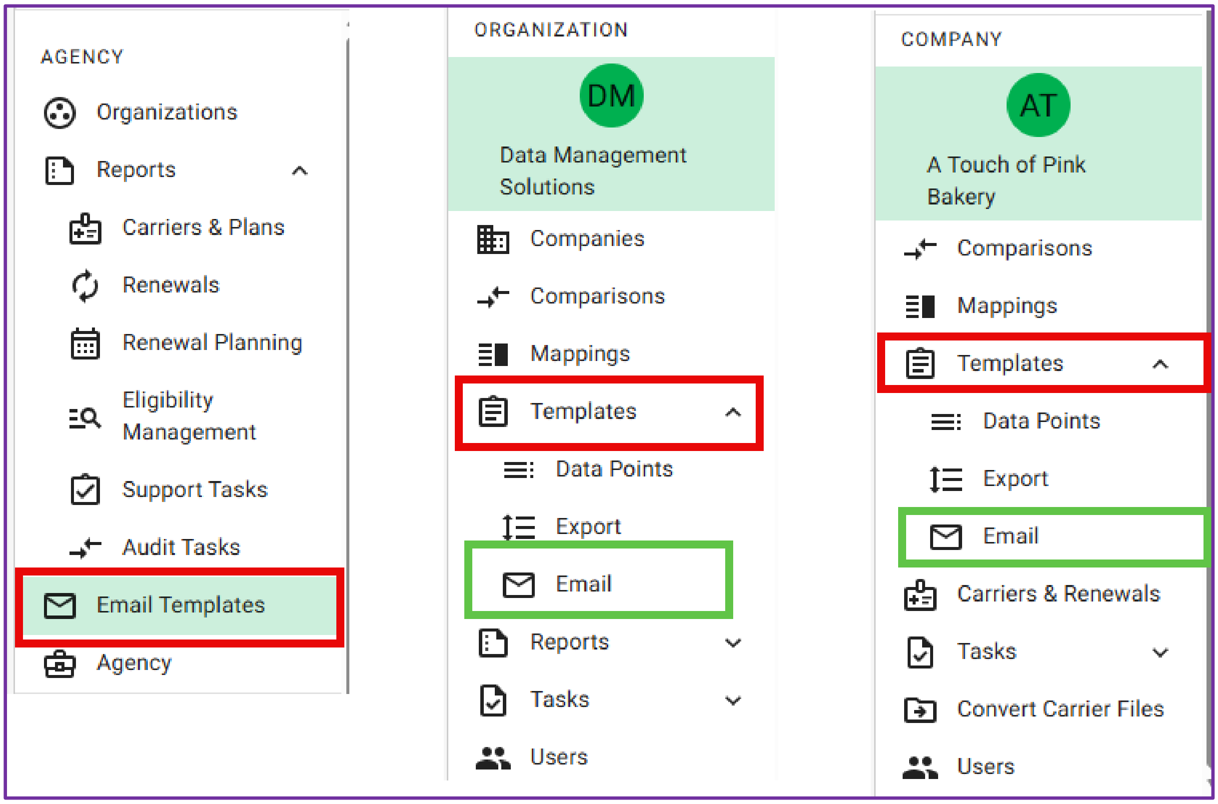
1. Customizable Templates:

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

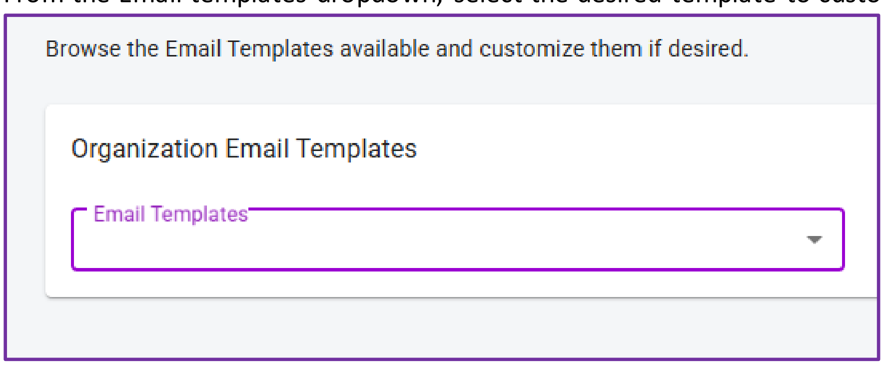
2. Additional Tokens:
    - Include dynamic data like carrier name, discrepancy counts, and renewal month in your emails for more personalized and informative communication.
3. Priority Rules:
    - Company-level templates take highest precedence
    - Organization-level templates are used if no Company template exists
    - Agency-level templates are used if neither Company nor Organization templates are available
    - If no custom templates are configured, the system defaults to the standard system-generated template

How to Customize an Email

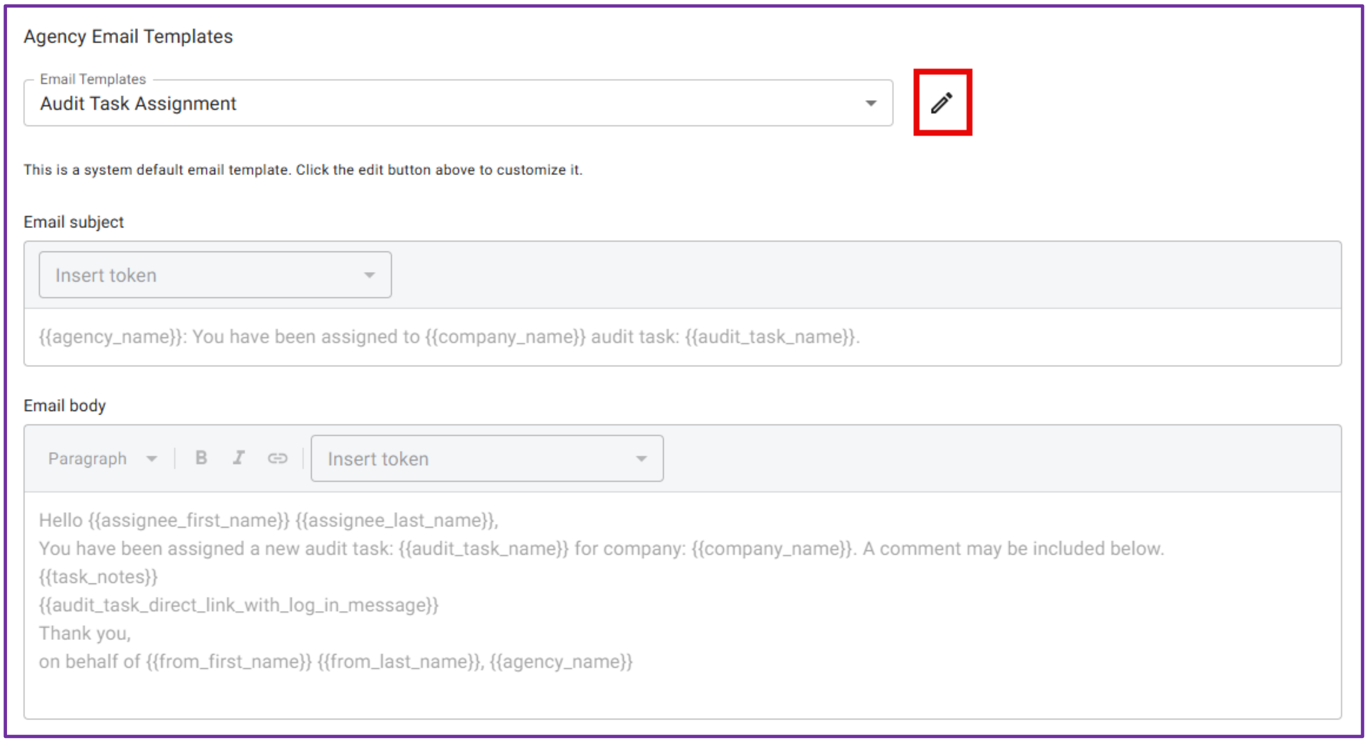
1. To customize an email, navigate to the **Template Library** at the **Agency**, **Organization**, or **Company** level, then select **EMAIL**.
    - At the **Agency level**, only the Email Template Library is available, so no dropdown will be displayed.
    - At the **Organization** and **Company**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

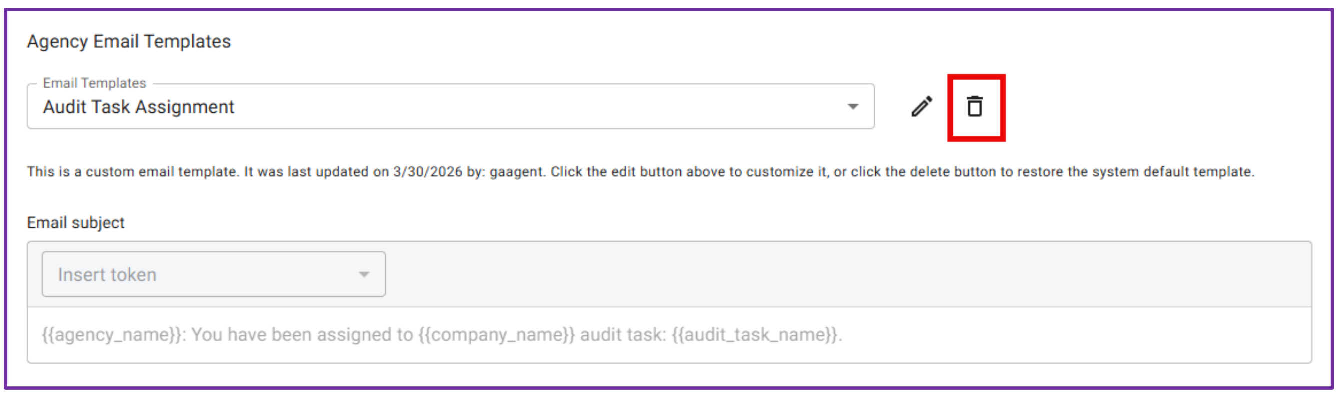


2. From the Email templates dropdown, select the desired template to customize.



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





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

5. Click SAVE once customized.

BenOps: Client Implementation Wizard

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

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

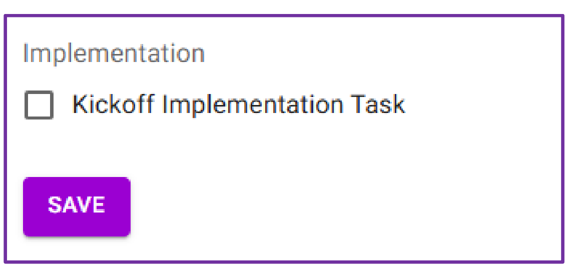
Who Does What?

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

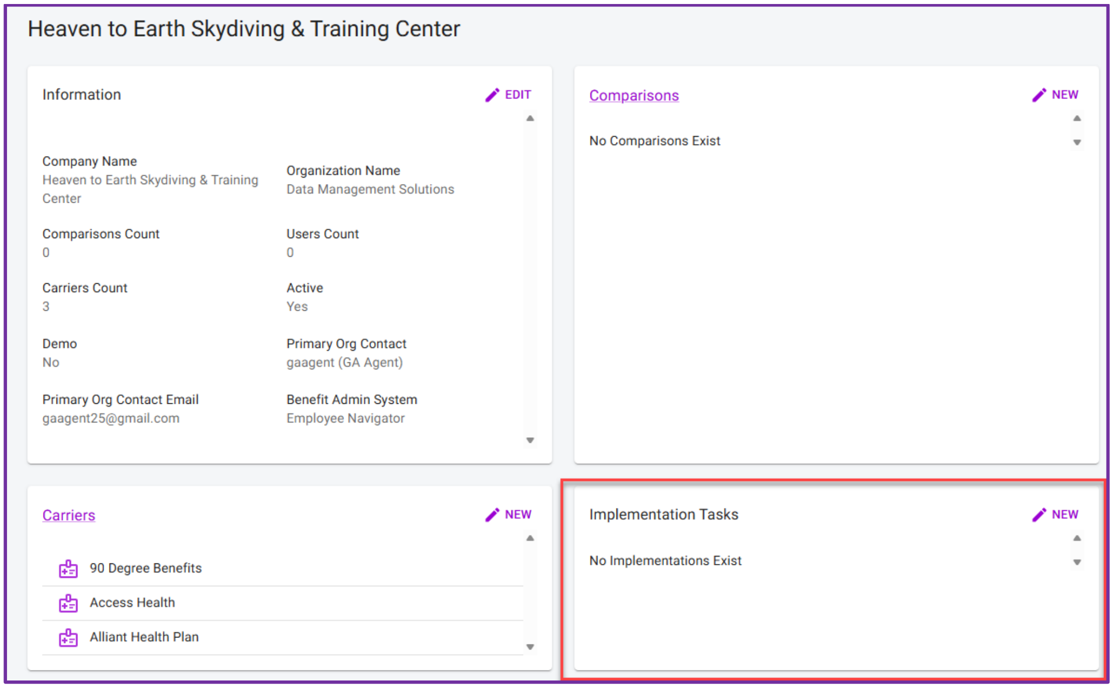
How It Works

Step 1: GA/Org Admin Initiates a Client Implementation

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

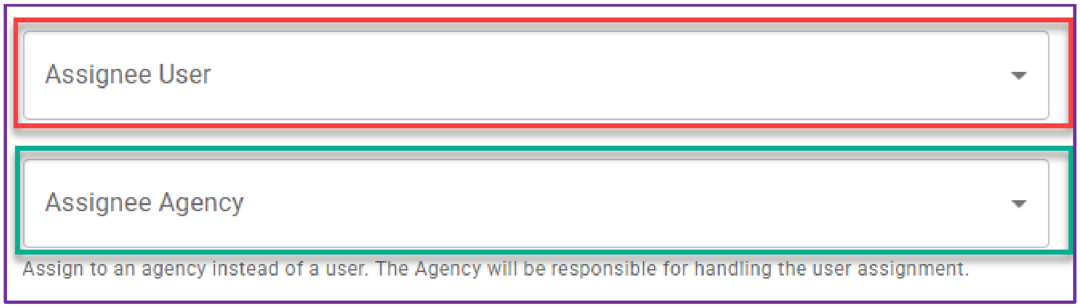


- If existing company,
  - Navigate to the specific company detail page.
  - Click New in the Implementation Task section

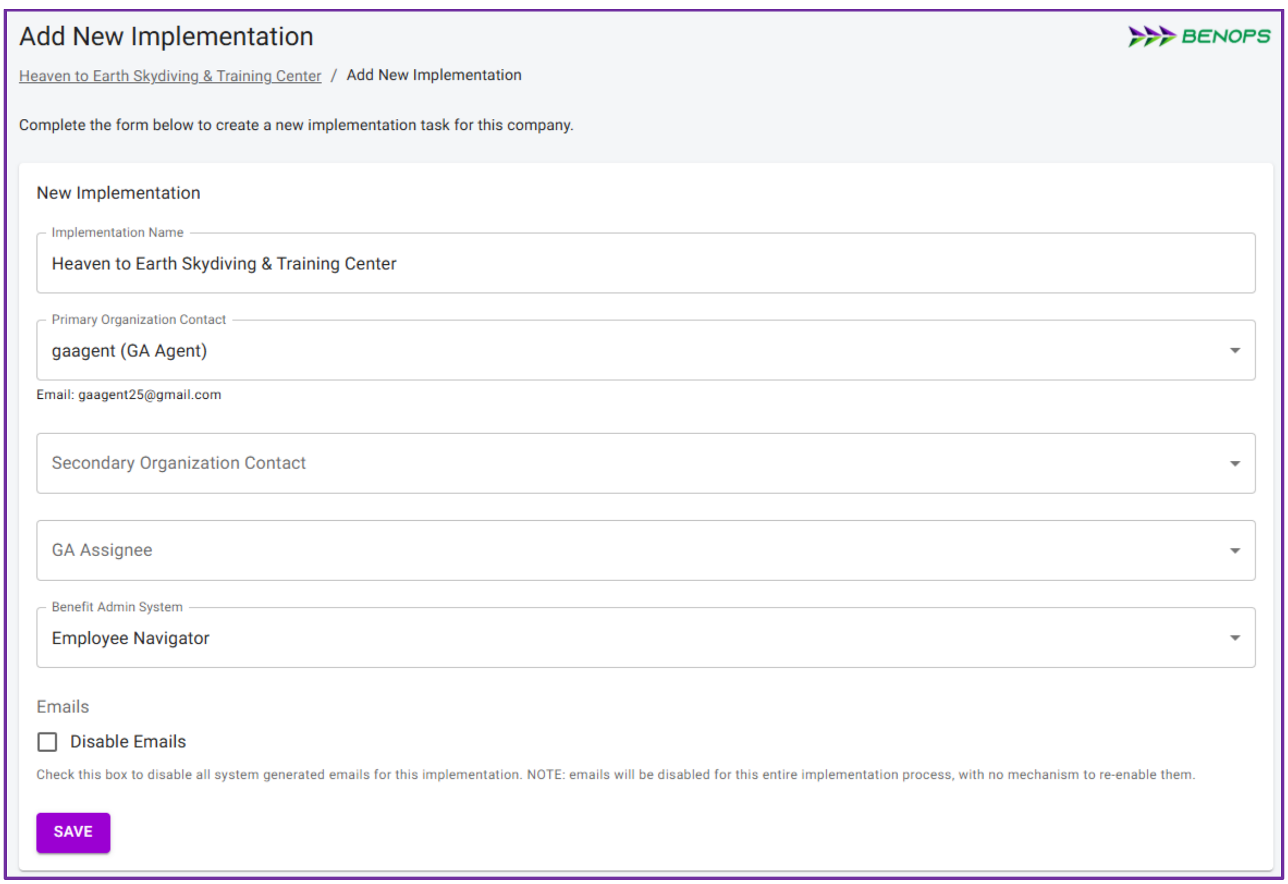


- Complete the following fields:
  - Implementation Task Name: This typically defaults to the Company Name but can be changed. The company name is not impacted by the task name change.
  - Primary Organization Contact (Required)
  - Secondary Organization Contact (Optional)
  - Select either an **Assignee** or an **Assignee Agency**.
    - **Assignee:** Select an individual user from the dropdown menu. The list includes applicable users from the Agency Administrator connected to the Organization.
    - **Assignee Agency:** Select from the agencies connected to the Organization. When an agency is selected, notifications are automatically sent to the agency's default support email address.

Only one assignment type can be selected at a time—either an individual user or an agency.



- 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.



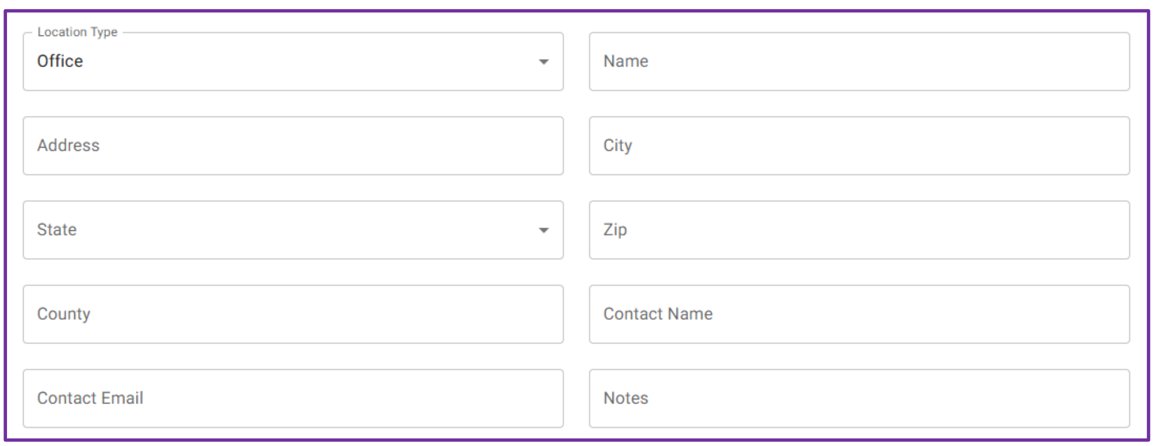
- **IF DISABLE EMAILS IS NOT CHECKED**, an **automated email** notifies the designated Primary, Secondary, and GA Assignee contact that an implementation has been created.

Step 2: Organization Completes Client Information

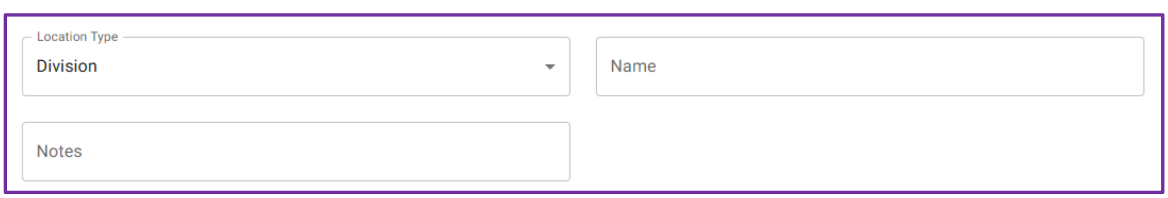
- The Organization will receive an Implementation Kickoff email outlining the next required actions. This email includes a link that, once logged into the application, allows the Organization user to easily access the implementation and begin **Step 1: Client Information**.
- The user will then complete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

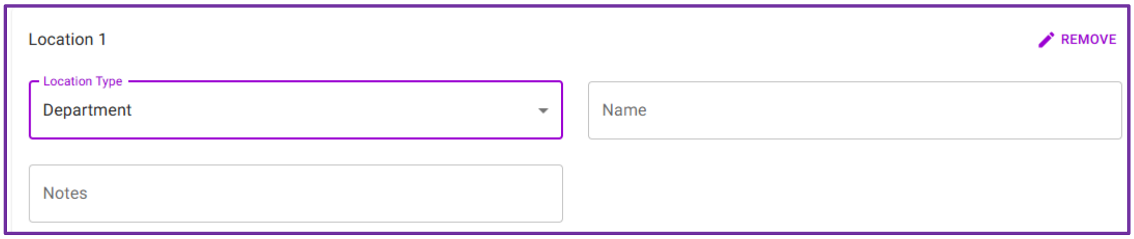
- **Locations (Office, Divisions, Departments, Business Units)** – Different information is required based on location type.
  - Office



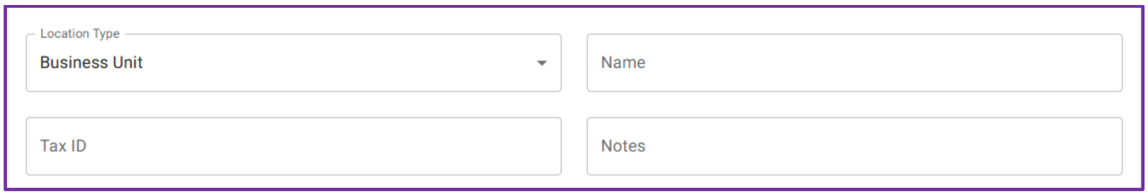
  - Division



  - Department



- Business Unit

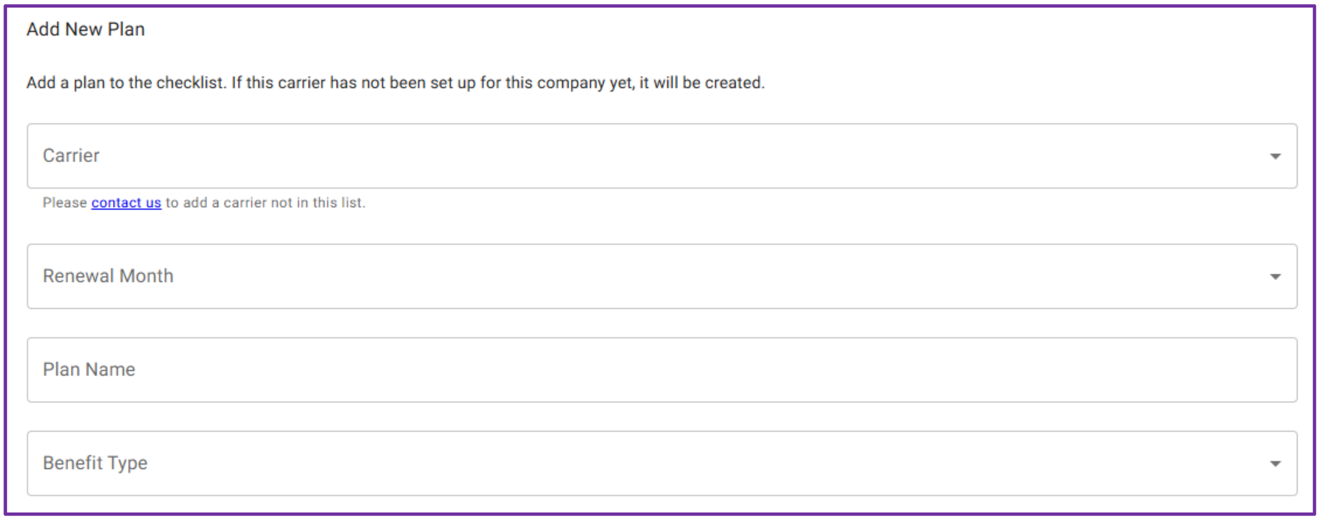


  - Comments

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

Step 3: Organization Completes Plans Checklist

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



Add New Plan

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

Carrier

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

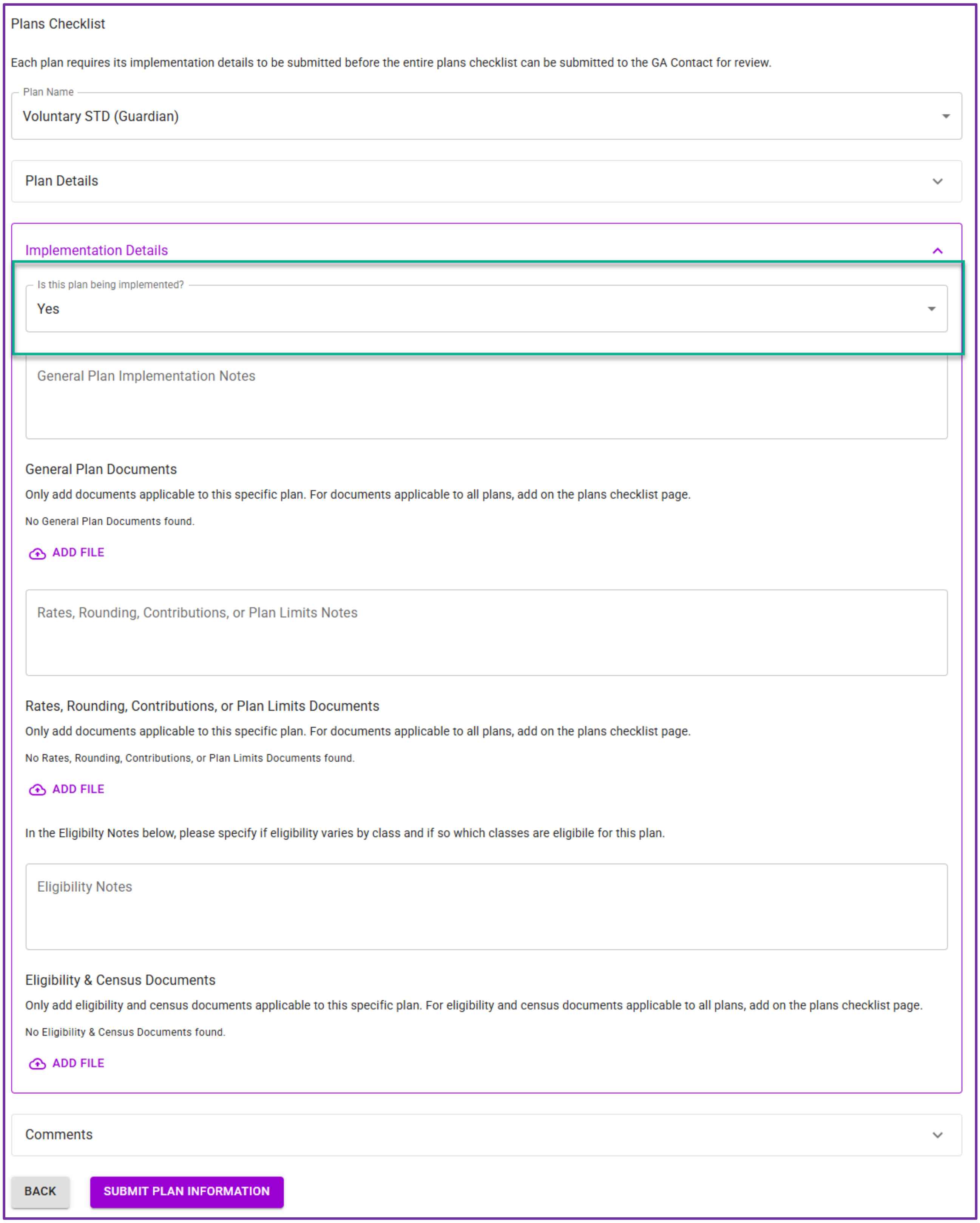
Renewal Month

Plan Name

Benefit Type

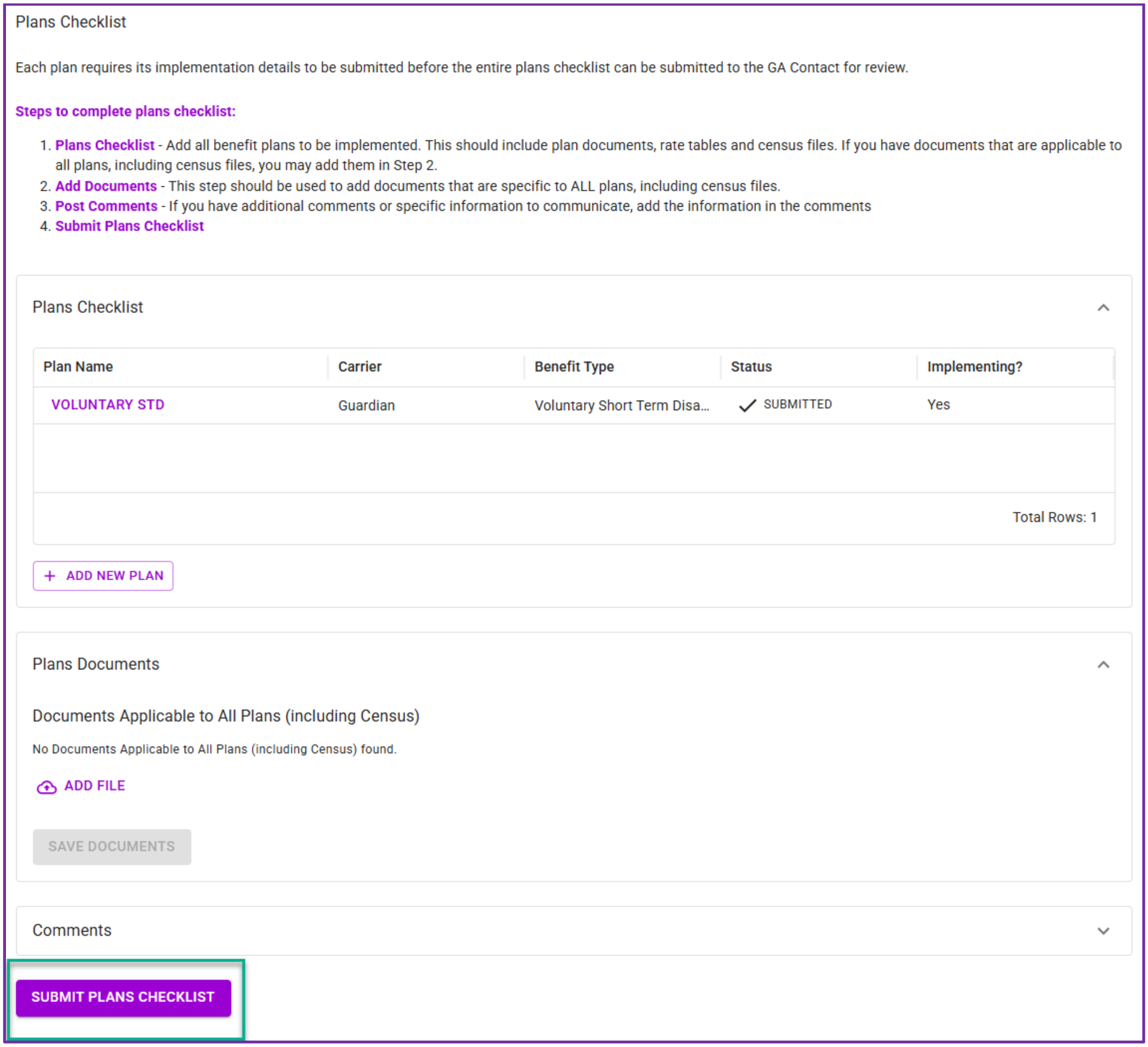
- Implementation Details
  - Complete the fields per Plan
    - Is this plan being implemented? —Defaults to YES
    - General Plan Implementation Notes and File Upload
    - Rates, Rounding, Contributions, or Plan Limits Notes and File Upload
    - Eligibility Notes and File Upload
    - Comments
 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

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



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

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



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, rate tables and census files. If you have documents that are applicable to all plans, including census files, you may add them in Step 2.
2. **Add Documents** - This step should be used to add documents that are specific to ALL plans, including census files.
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?
VOLUNTARY STD	Guardian	Voluntary Short Term Disa...	SUBMITTED	Yes

Total Rows: 1

ADD NEW PLAN

Plans Documents

Documents Applicable to All Plans (including Census)

No Documents Applicable to All Plans (including Census) found.

ADD FILE

SAVE DOCUMENTS

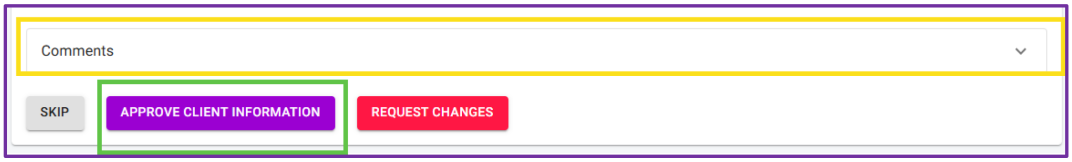
Comments

SUBMIT PLANS CHECKLIST

Step 4: GA Reviews & Collaborates

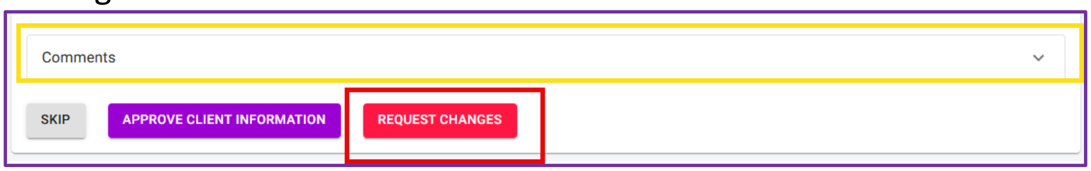
- GA will receive an email when the Organization contact completes the Client Information and/or Plans Checklist.
  - **GA Review Client Information – Approval**

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**.



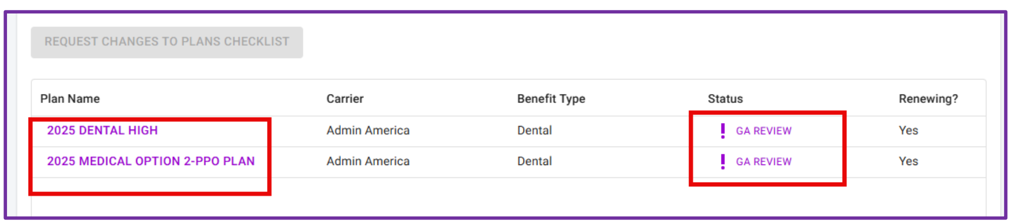
- ○ **GA Review Client Information – Request Changes**

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

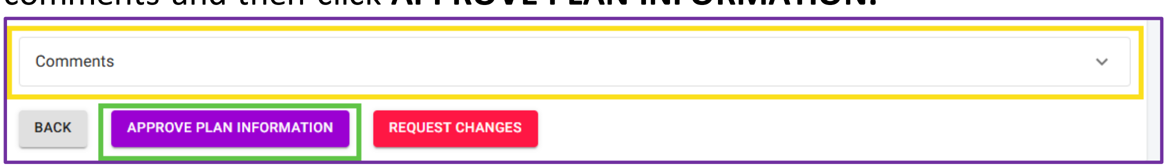


- ○ **GA Review Plans Checklist – Approval**

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

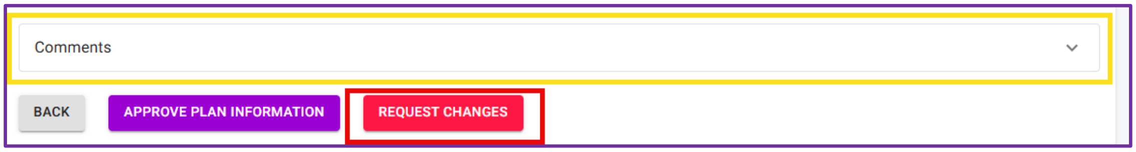


If all required information and documents have been provided by the organization contacts and no further details are needed, the GA should add any desired comments and then click **APPROVE PLAN INFORMATION.**



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

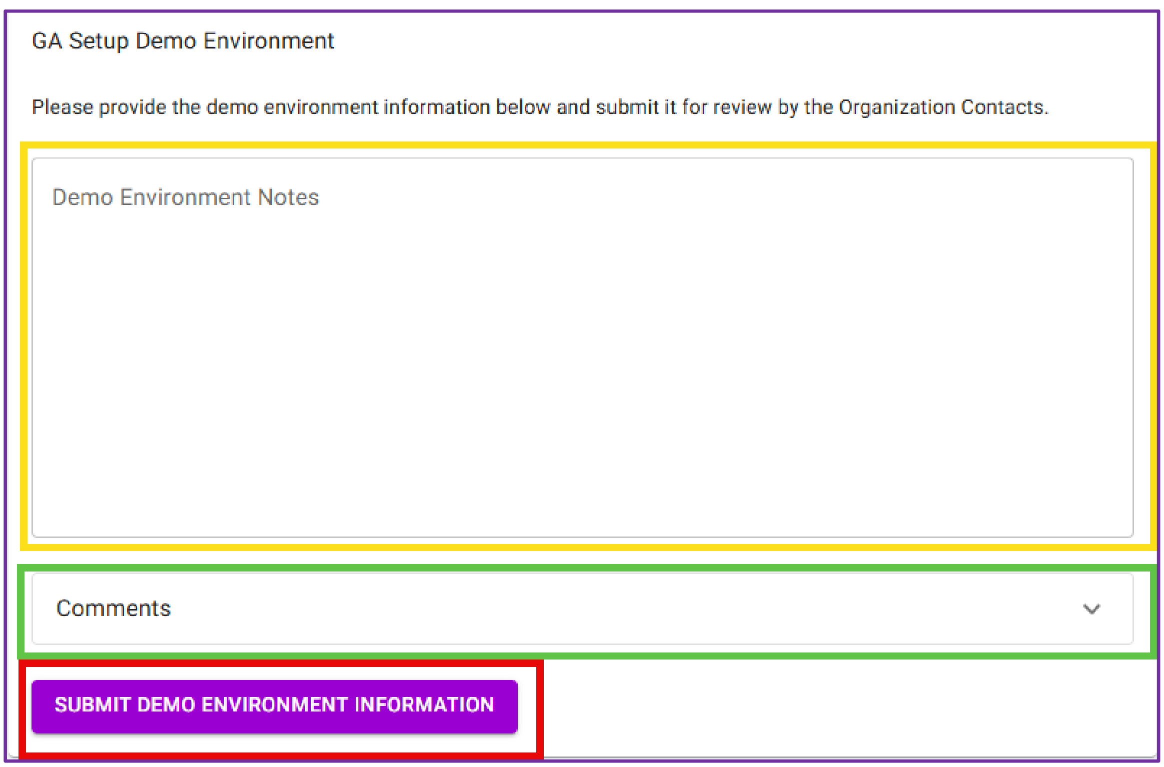
If additional information or clarification is needed, the GA should add a comment and then click **REQUEST CHANGES**. This will send an email with the comment to the organization contacts



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

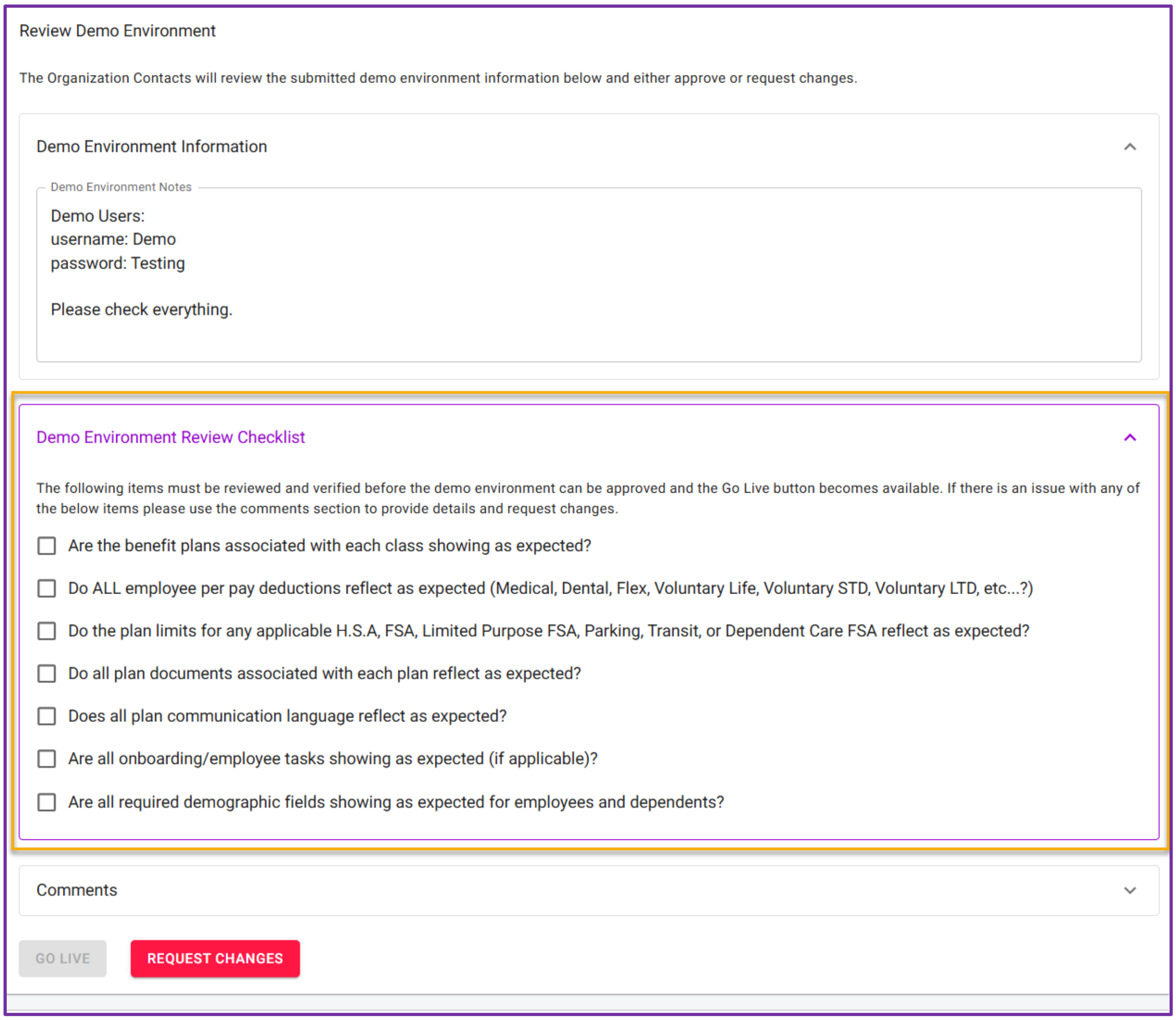
Steps 5 & 6: Testing & Go Live

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



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

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


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.

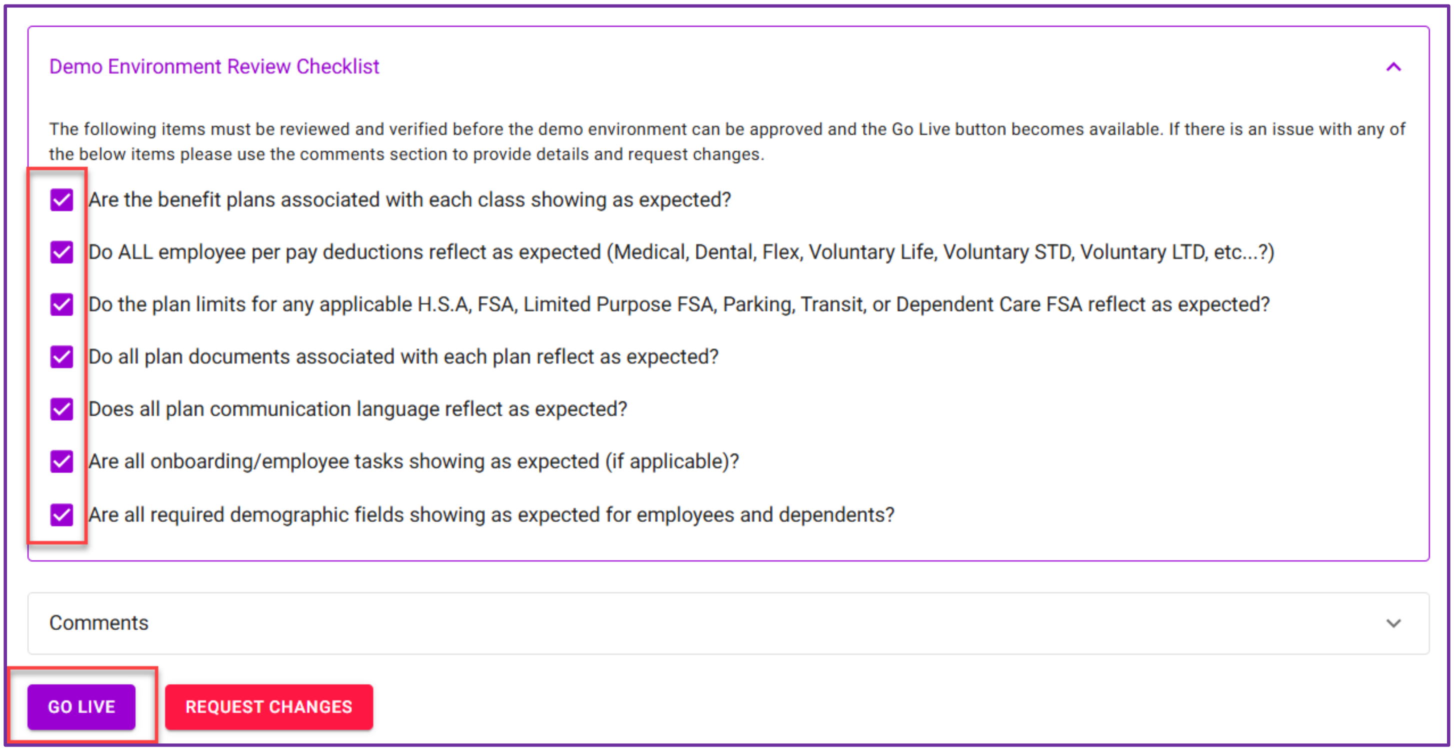
Demo Environment Review Checklist

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

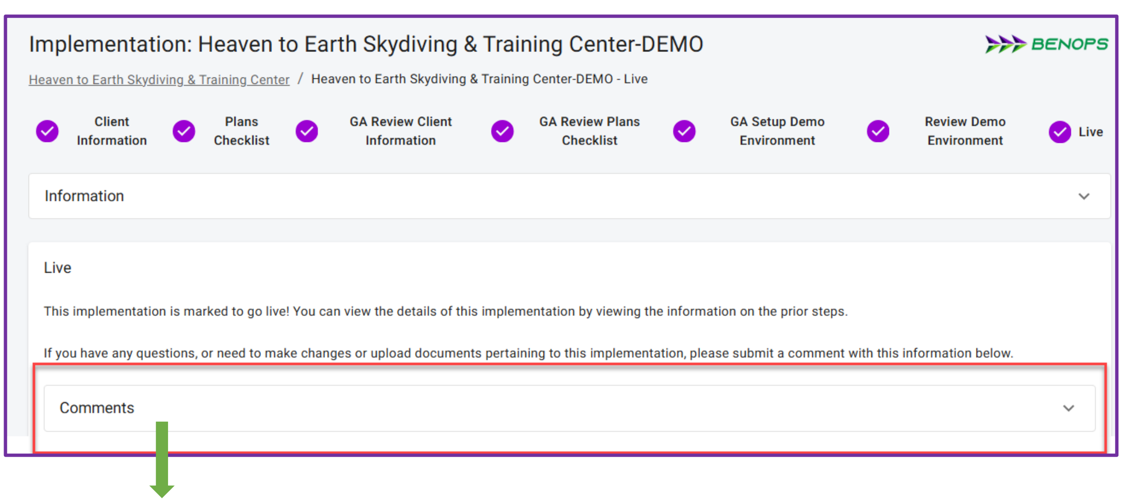
GO LIVE   REQUEST CHANGES

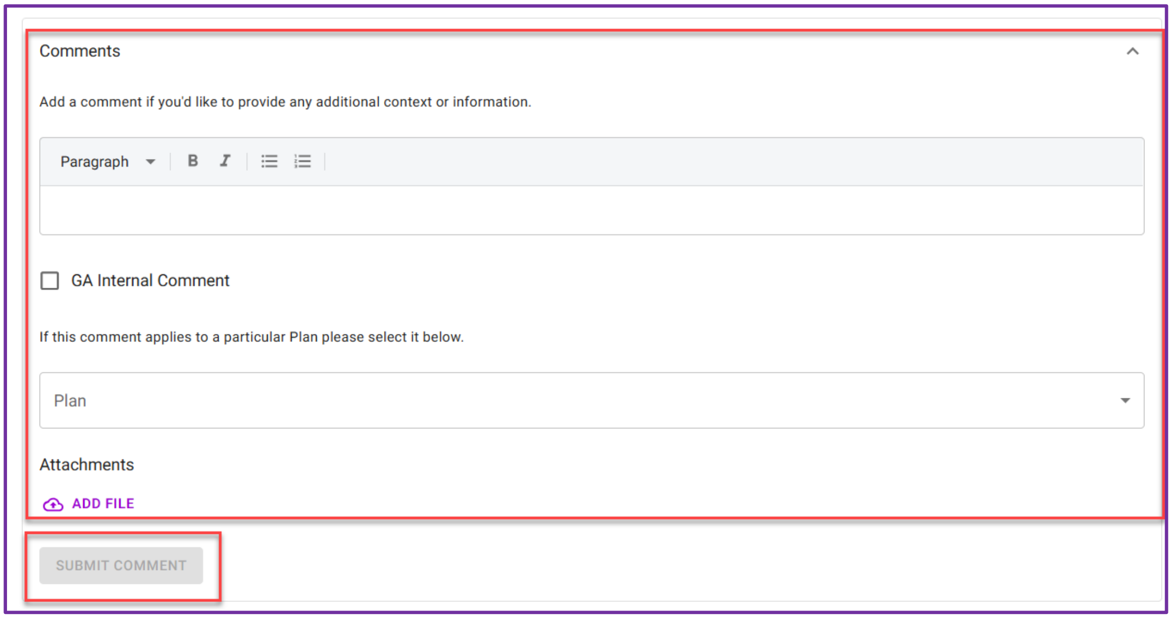


Step 7: Implementation Completion

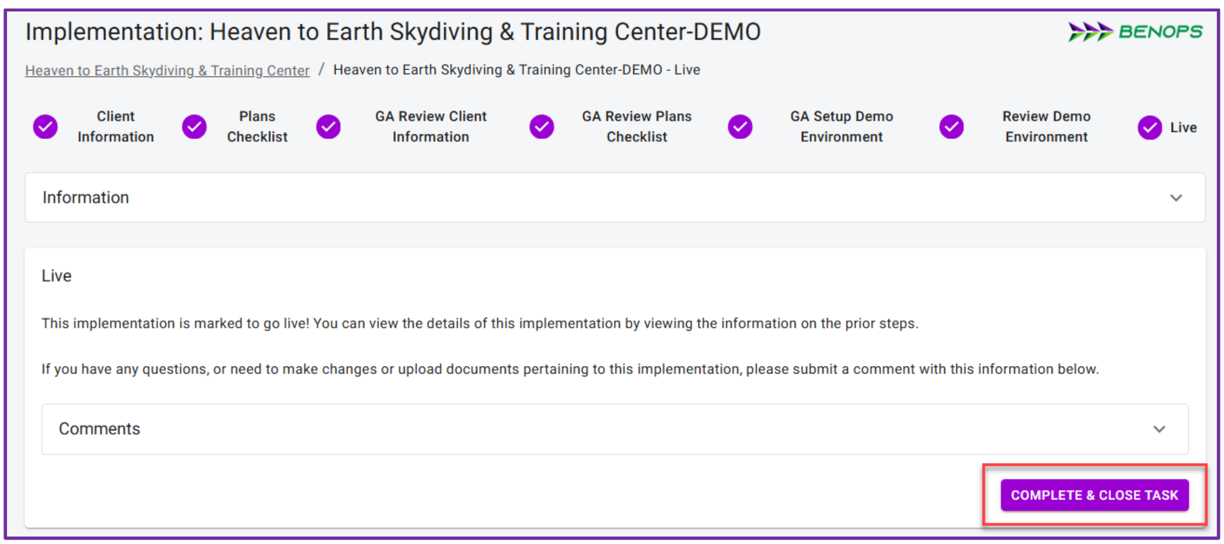
- Once live, the implementation is **locked**—previous steps cannot be reopened.
- Post-Go Live:

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





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



- A **final closeout email** is sent, marking the implementation complete.

BenOps: Client Migration Wizard

The Client Migration Wizard is a collaborative workspace that helps clients collect, organize, and review the information needed to migrate a new group from one benefit administration system to another.

By standardizing the migration process, the Migration Wizard improves visibility into project status, helps ensure important implementation steps aren't missed, and creates a complete history of migration activities and supporting documentation. The result is better collaboration and a more organized migration from start to finish.

Who Does What?

GA (General Agent) / Organization Admin → Starts the migration

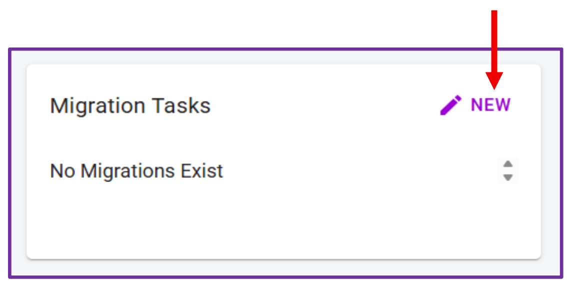
GA (General Agent) → Gathers client information, enters testing details, closes task.

Organization Contacts → Tests and approves the migration to Go Live.

How It Works

Step 1: GA/Org Admin Initiates a Client Migration

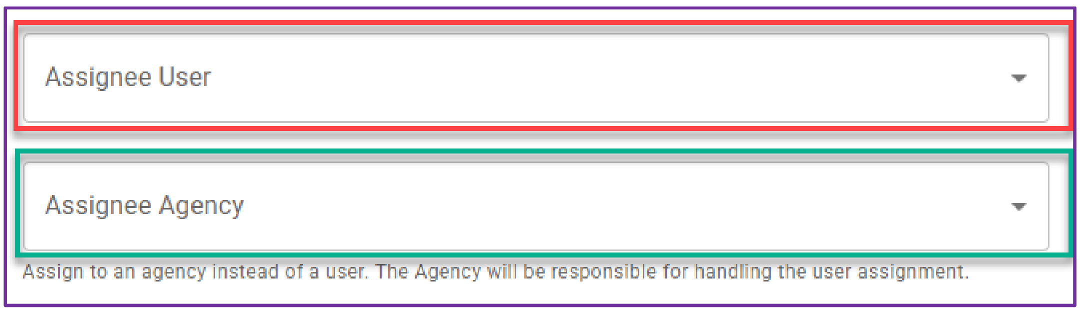
- User logs into the **Streamline application**.
- Navigate to the Organization/Company section.
- Click New in the Migration Tasks section



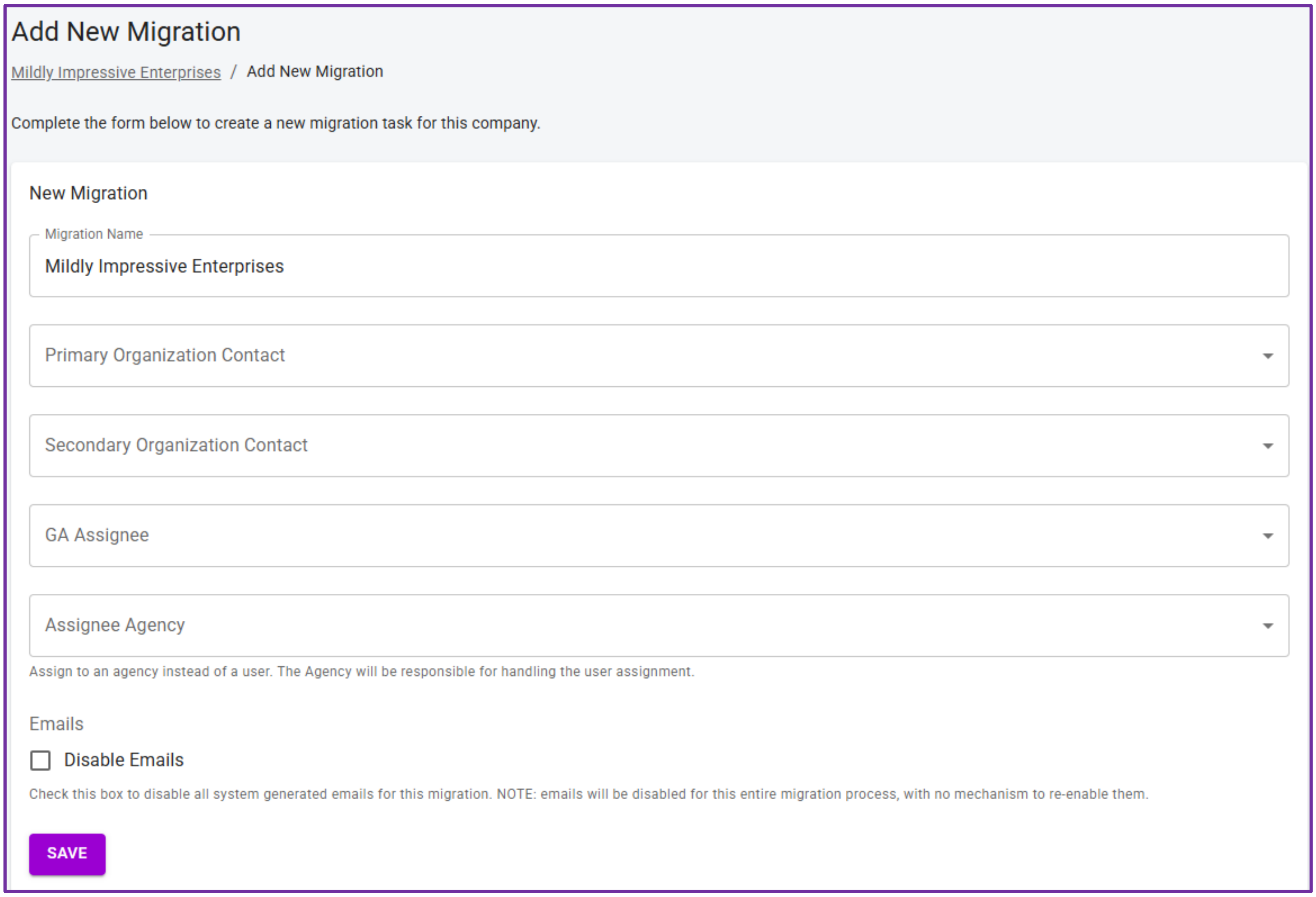
  - Complete the following fields:
    - Implementation Task Name: This typically defaults to the Company Name but can be changed. The company name is not impacted by the task name change.
    - Primary Organization Contact (Required)
    - Secondary Organization Contact (Optional)
    - Select either an **Assignee** or an **Assignee Agency**.

- **Assignee:** Select an individual user from the dropdown menu. The list includes applicable users from the Agency Administrator connected to the Organization.
- **Assignee Agency:** Select from the agencies connected to the Organization. When an agency is selected, notifications are automatically sent to the agency's default support email address.

Only one assignment type can be selected at a time—either an individual user or an agency.



- 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.



- **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: General Agent Completes Client Information

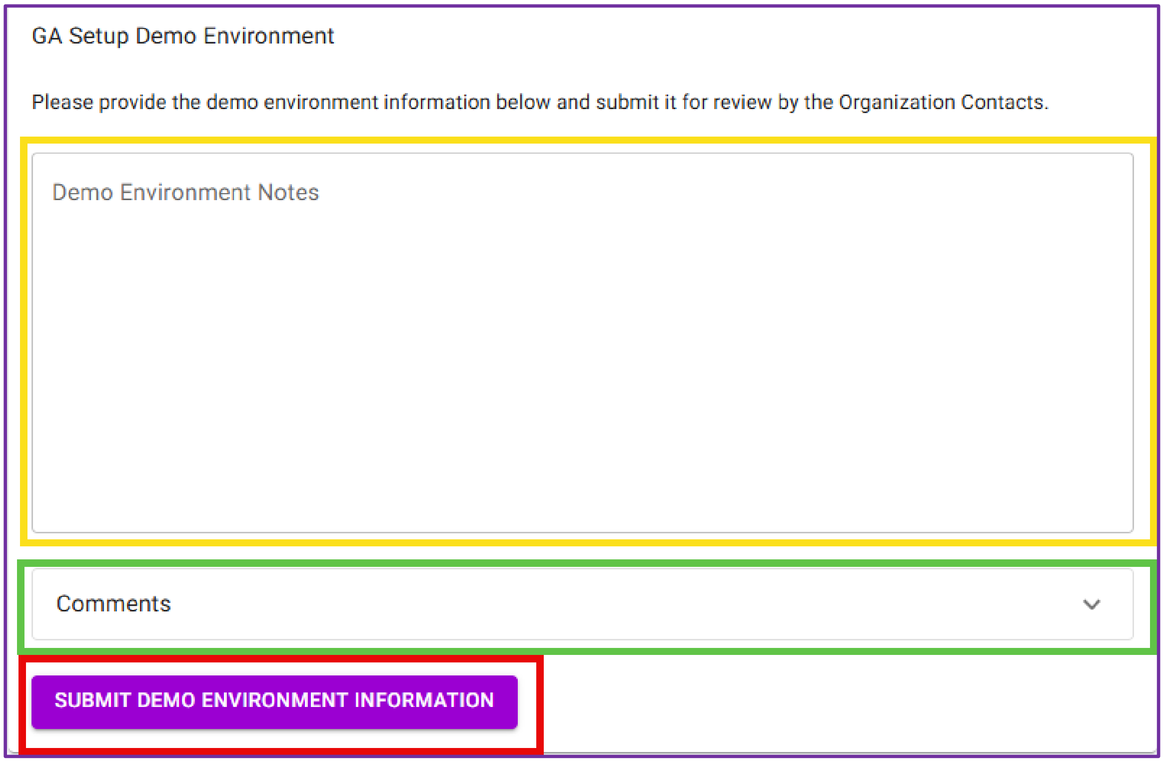
- If the migration was kicked off by the Organization, the General Agent (GA) default support email will receive a Migration Kickoff email outlining the next required actions. This email includes a link that, once logged into the application, allows the GA user to easily access the implementation and begin **Step 1: Client Information**.
- The user will then complete the following fields:
    - Migration Name – defaults to the company name but can be changed as needed.
    - Origin System – the ben admin system the migration data is coming from
    - Target System – the ben admin system the migration data is going to

- Login Credentials Received Date – the date the login credentials were received
- Group Structure Setup Date – the date the group structure was setup in the target system
- Eligibility, Plans, Rates Setup Date – the date the eligibility, plans, and rates were setup in the target system
- Plan Communications & Documents Setup Date – the date the plan communications and documents were setup in the target system
- Onboarding & PTO Setup Date (Optional) – that date the onboarding and PTO were setup in the target system
- Demographic & Enrollment Data Extracted Date – that date the data was extracted from the origin system
- Demographic & Enrollment Data Imported Date– that date the data was imported into the target system
- General Client Information Files - This is an area where document(s) that are applicable to this migration including census data can be uploaded.
- Comments

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

Steps 3 & 4: Testing & Go Live

- Once the Client Information has been approved, it is time to set up the Demo Environment in the Benefit Administration System. On Step 3, the GA enters **testing details** such as demo users and instructions in the Demo Environment Notes section as well as any additional comments or files and then clicks SUBMIT DEMO ENVIRONMENT INFORMATION.



- Organization is notified by automated email and begins testing in the new **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.

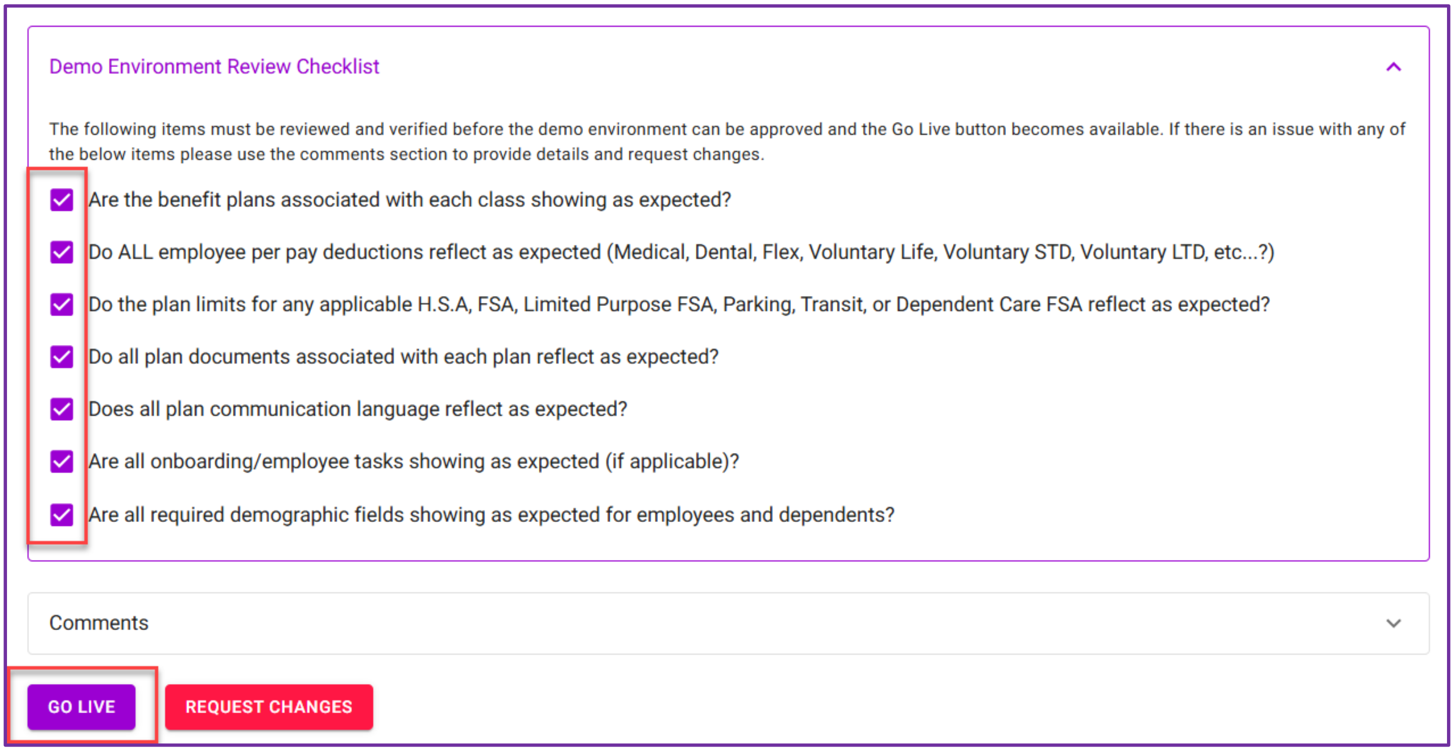
Demo Environment Review Checklist

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

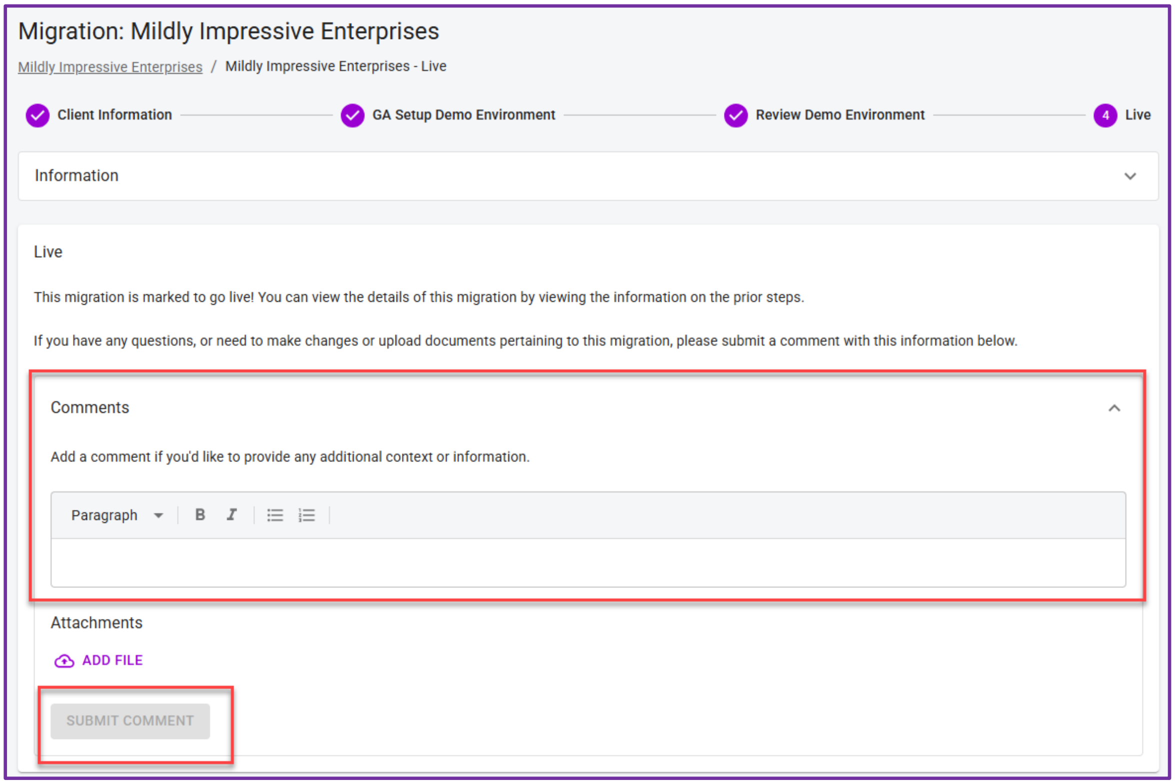
GO LIVE REQUEST CHANGES



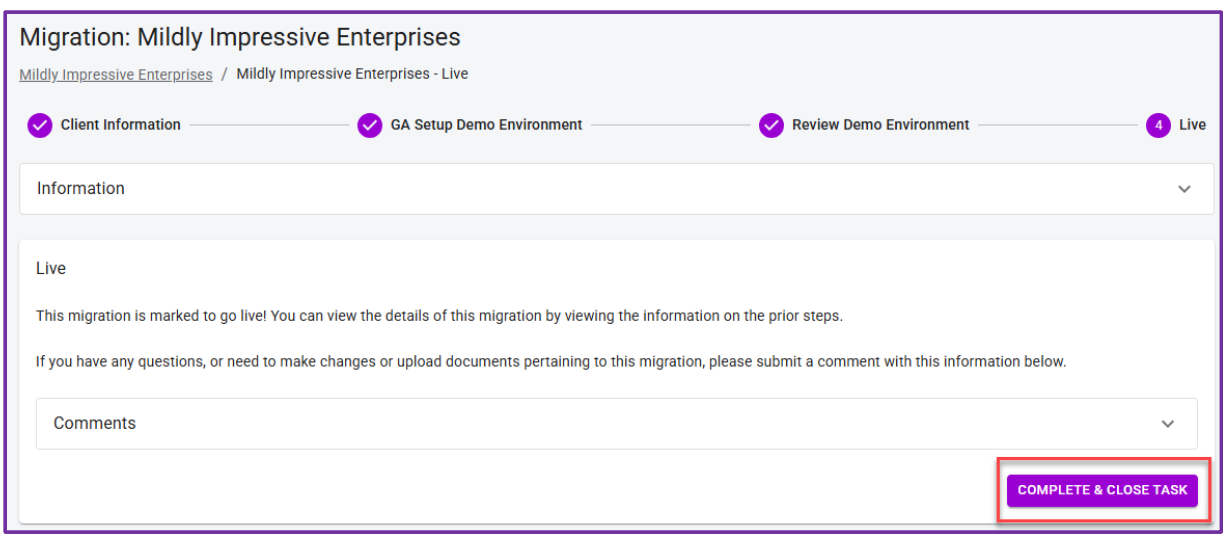
Step 5: Migration Completion

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

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



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



- A **final closeout email** is sent, marking the migration complete.

BenOps: File Implementation

The File Implementation task within Eligibility Management Tasks provides a centralized workflow for managing the setup and implementation of company files, including 834 EDI, Data Exchange, and Proprietary file types. This task streamlines the implementation process by creating a consistent workflow while improving visibility, tracking, and accountability from initial setup through production deployment.

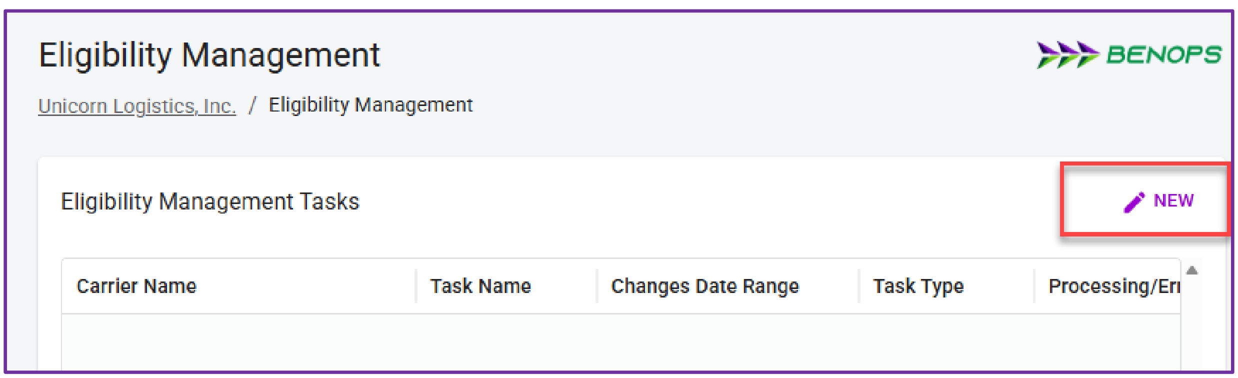
Who Does What?

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

How It Works

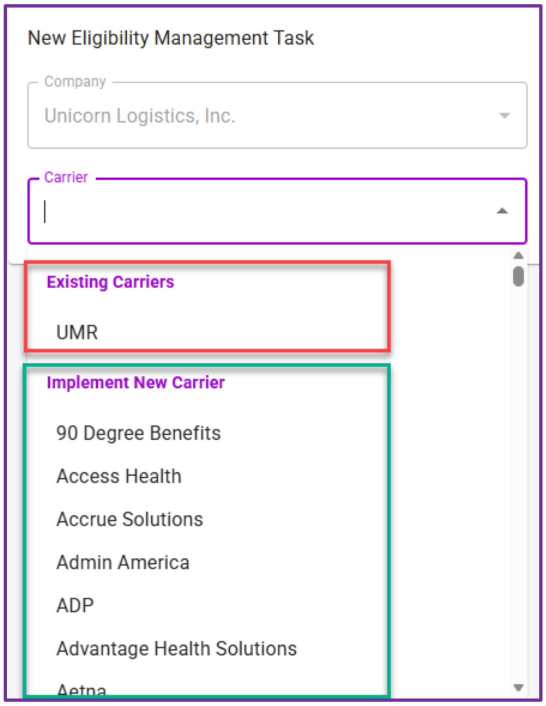
Creating a File Implementation Eligibility Management Task

1. GA logs into the Streamline application.
2. Navigate to the applicable **Organization > Company** with the upcoming file implementation.
3. Under **Eligibility Management Tasks**, select **New**.



4. Select the applicable company:
   - If the task is created at the Organization level, select the company from the dropdown.
   - If the task is created at the Company level, the company information will automatically populate.

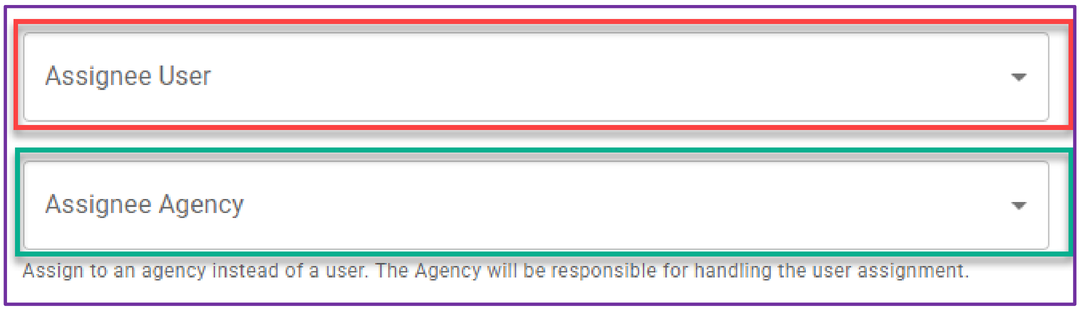
5. Select the carrier from the dropdown menu:
   - For an existing carrier file implementation, select the carrier listed under the **Existing Carrier** section.
   - For a new carrier file implementation, select the carrier from the available carrier list.



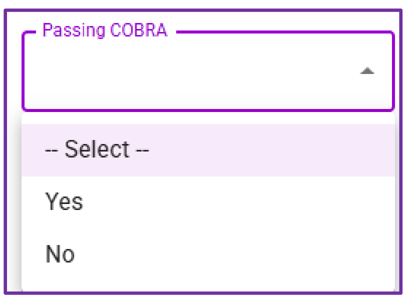
6. Select the **Eligibility Management Type** from the dropdown menu.
   - The **Eligibility Management Task Type** will automatically default to **File Implementation** if the carrier is new.
   - If the file implementation is for an existing carrier and the selected Eligibility Management Type differs from the current setup, the Eligibility Management Type will automatically update in the carrier details once the task is completed.
7. Enter the **File Implementation Name**.
8. The **Task Creator** will automatically default to the user creating the task.
9. Select either an **Assignee** or an **Assignee Agency**.
   - **Assignee:** Select an individual user from the dropdown menu. The list includes applicable users from the Agency Administrator connected to the Organization.

- **Assignee Agency:** Select from the agencies connected to the Organization. When an agency is selected, notifications are automatically sent to the agency's default support email address.

  Only one assignment type can be selected at a time—either an individual user or an agency.

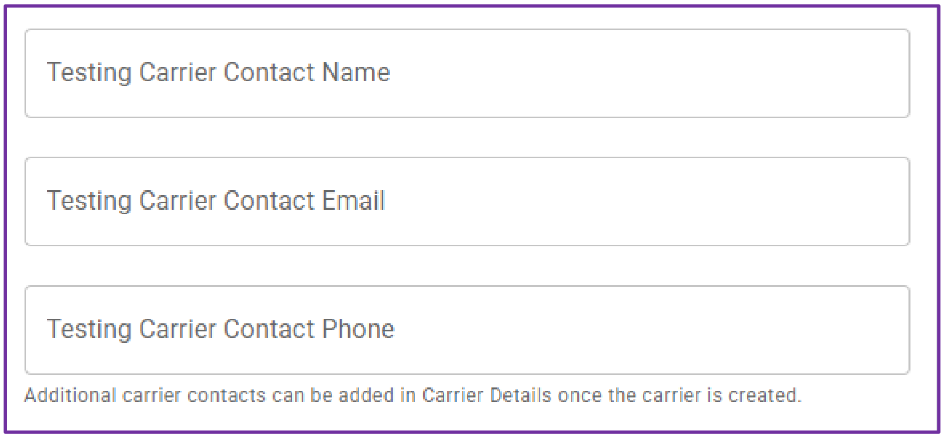


10. Select whether the file is **Passing COBRA** by choosing Yes or No.



11. Enter the **Testing Carrier Contact Information**, including:
    - Contact Name
    - Email Address
    - Phone Number

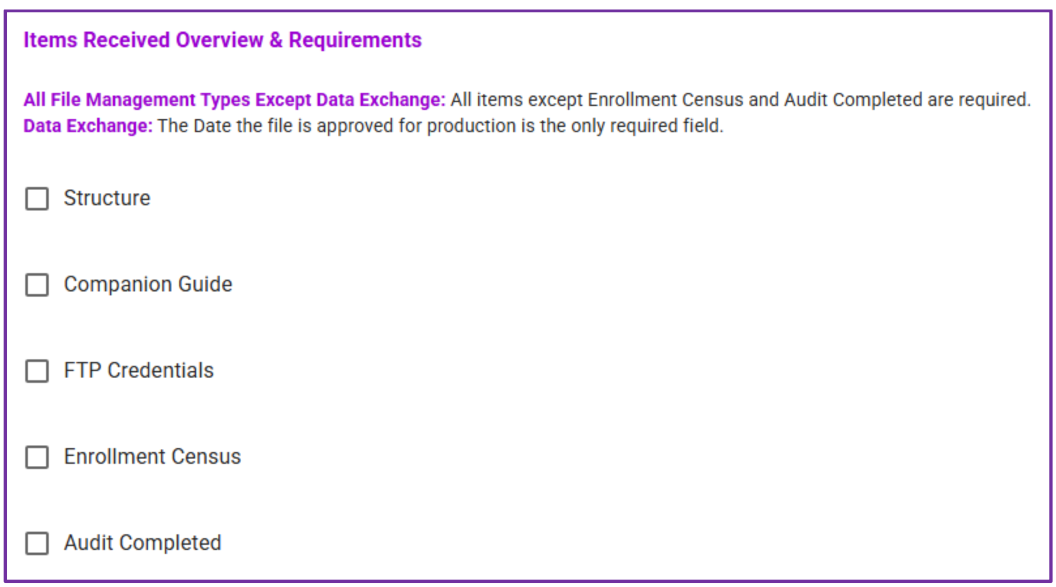
If multiple carrier contacts are needed or have been provided, additional contacts can be added within the carrier details after the carrier has been created in Streamline.



12. Complete the **Items Received Overview & Requirements** section.

All items are required for each Eligibility Management Type except **Enrollment Census** and **Audit Completed**. For **DEX (Data Exchange)** files, only the **Approved for Production Date** is required.

- **Structure** – Enter the date the structure was received.
- **Companion Guide** – Enter the date the companion guide was received.
- **FTP Credentials** – Enter the date the FTP credentials were received.
- **Enrollment Census** – Enter the date the enrollment census was received.
- **Audit Completed** – Enter the date the audit was completed.



13. Enter the date the **first test file was sent**.

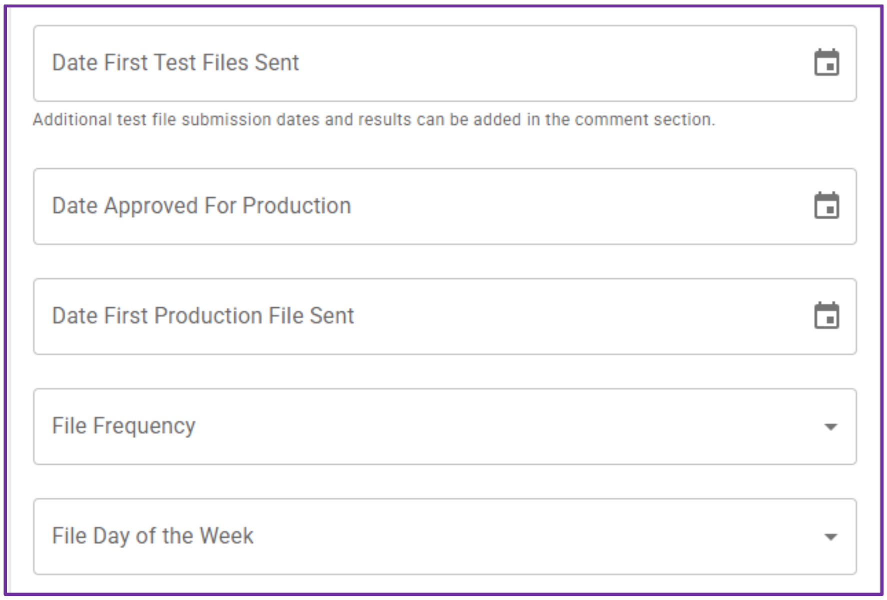
- If additional test files are sent, document the additional dates and results in the comments section.

14. Enter the date the **file was approved for production**.

15. Enter the date the **first production file was sent**.

16. Select the **File Frequency** from the dropdown menu.

17. Select the **File Day of the Week** that the file is scheduled to be sent.

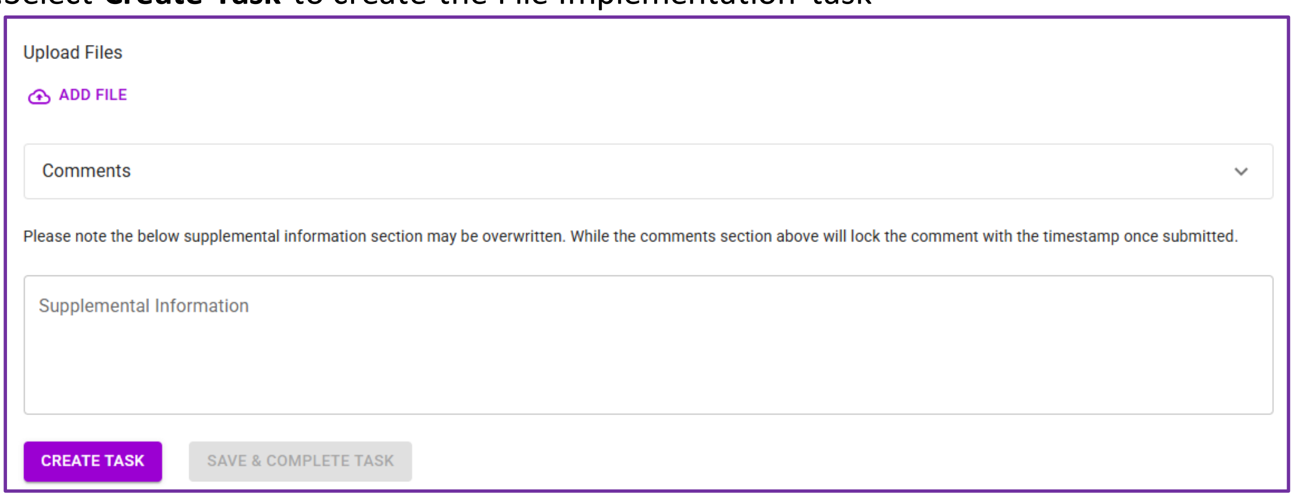


18. Upload any applicable files.

19. Add comments as needed.

20. Enter any supplemental information.

21. Select **Create Task** to create the File Implementation task



BenOps: File Renewal

The File Renewal task within Eligibility Management Tasks provides a centralized workflow for managing the renewal of company files, including 834 EDI, Data Exchange, and Proprietary file types. By centralizing dates, documentation, and renewal activities, agencies gain better visibility into renewal progress, improve coordination with carriers, reduce the risk of missed steps, and maintain a complete history of each year's renewal process.

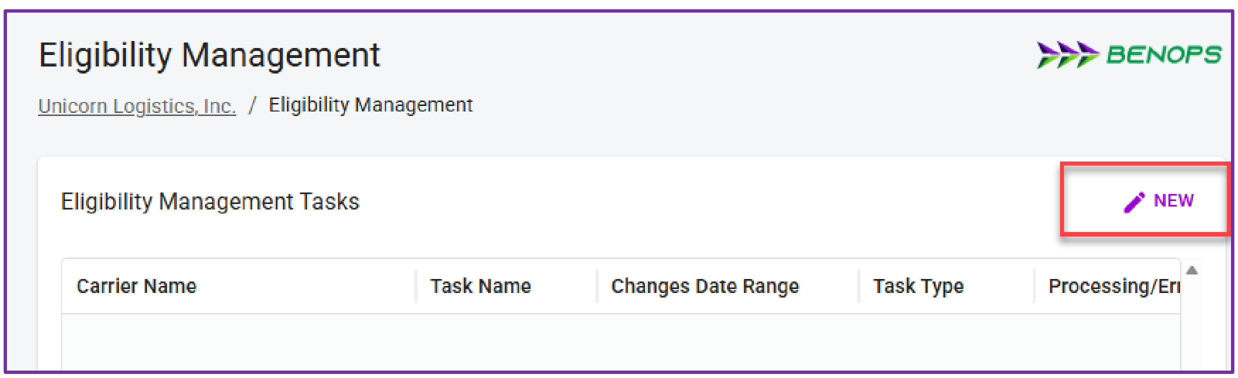
Who Does What?

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

How It Works

Creating a File Renewal Eligibility Management Task

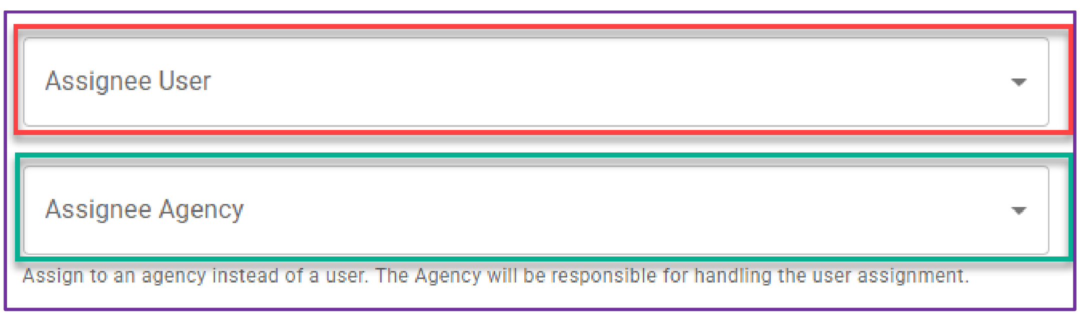
1. GA logs into the Streamline application.
2. Navigate to the applicable **Organization > Company** with the upcoming file renewal.
3. Under **Eligibility Management Tasks**, select **New**.



4. Select the applicable company: (Required field to create)
   - If the task is created at the Organization level, select the company from the dropdown.
   - If the task is created at the Company level, the company information will automatically populate.

5. Select the carrier from the dropdown menu:
    - Select the carrier listed under the **Existing Carrier** section - A renewal is only applicable to existing carriers. (Required field to create)
6. Select **File Renewal** from the **Eligibility Management Type** from the dropdown menu. (Required field to create)
7. Enter a descriptive **File Renewal Name**. As a best practice, include the renewal year and any other relevant information in the naming convention to make the renewal easy to identify. (Required field to create)
8. The **Task Creator** will automatically default to the user creating the task.
9. Select either an **Assignee** or an **Assignee Agency**.
    - **Assignee:** Select an individual user from the dropdown menu. The list includes applicable users from the Agency Administrator connected to the Organization.
    - **Assignee Agency:** Select from the agencies connected to the Organization. When an agency is selected, notifications are automatically sent to the agency's default support email address.

    Only one assignment type can be selected at a time—either an individual user or an agency.

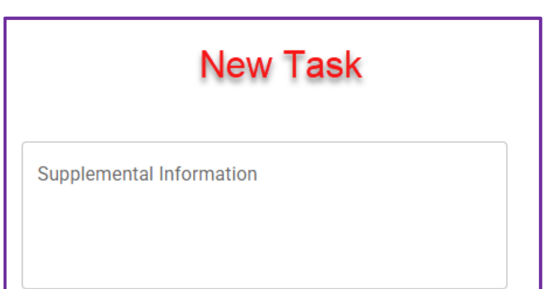


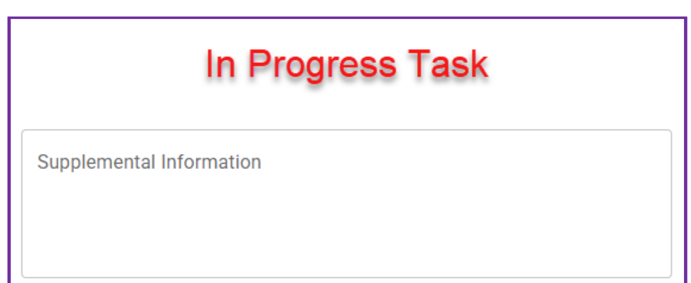
10. Complete the File Renewal Details & Requirements section once items have been received or completed:
    Required to complete: Enrollment Start Date, Enrollment End Date, Administration End Date, Date OE Email Sent to Carrier, File Sent to Carrier, and Date File Processed Confirmed.

Optional: File Date Requested by Carrier, Structure and Mapping update dates, Termination Handling, and whether a post–open enrollment audit is required.

- Enrollment Start Date
- Enrollment End Date
- Administration End Date
- Date OE Email Sent to Carrier
- File Date Requested by Carrier
- File Sent to Carrier
- Structure Updates checkbox and Date Structure Received
- Mapping Updates Available checkbox and Date Mappings Updated
- Termination Handling dropdown:
    1. Term By Omission
    2. Send Terms on a Separate File
    3. Sent Termination File Only
    4. Term by Omission and Send Terms on a Separate File
- Is Post OE Audit Required: Yes or No
- Date File Processes Confirmed

11. Upload any applicable files.
12. Add comments as needed.
13. Enter any supplemental information.
14. Select **Create Task** to create the File Renewal task or **Save & Complete Task** when closing the task.





BenOps: Client Renewal Wizard

The Client Renewal Wizard in the Streamline application is a shared workspace where a General Agent (GA) can start a group's renewal and collaborate with designated Organization contact(s) to complete the renewal information checklist—covering items such as Open Enrollment dates and plan details.

Who Does What?

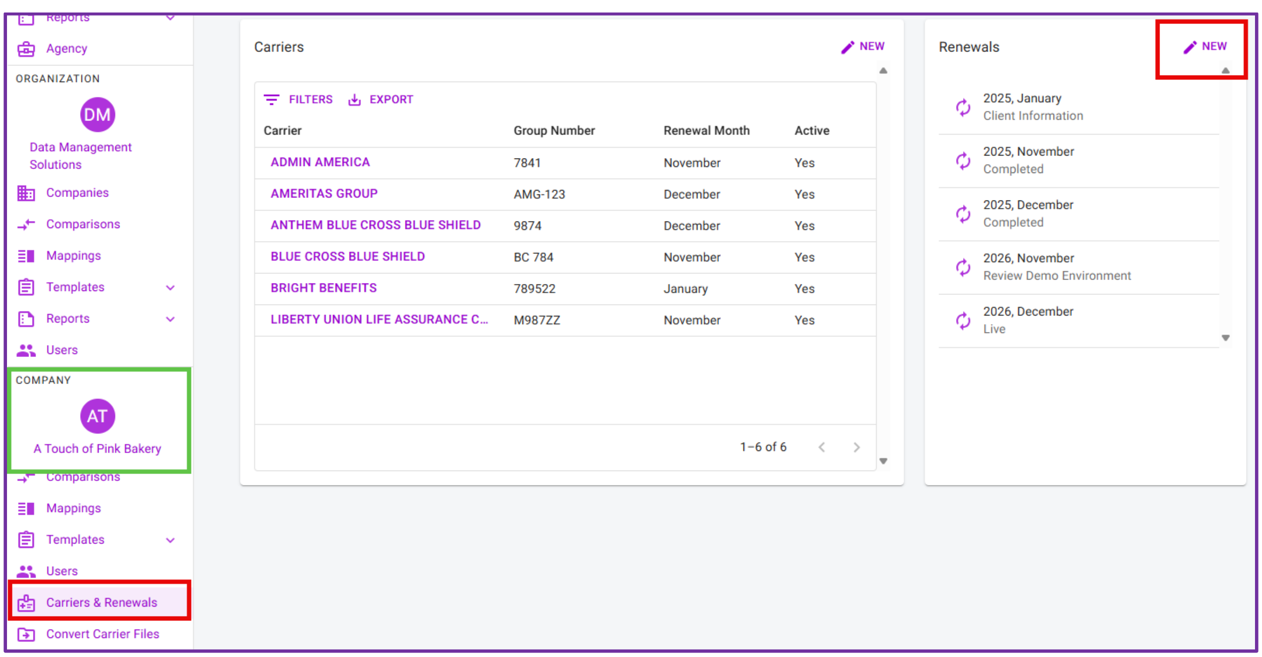
GA (General Agent) → Starts the renewal, reviews/approves, enters testing details, closes task.

Organization Contacts → Provides client information, completes plans checklist, tests, and approves the renewal to Go Live.

How It Works

Step 1: GA Initiates a Renewal

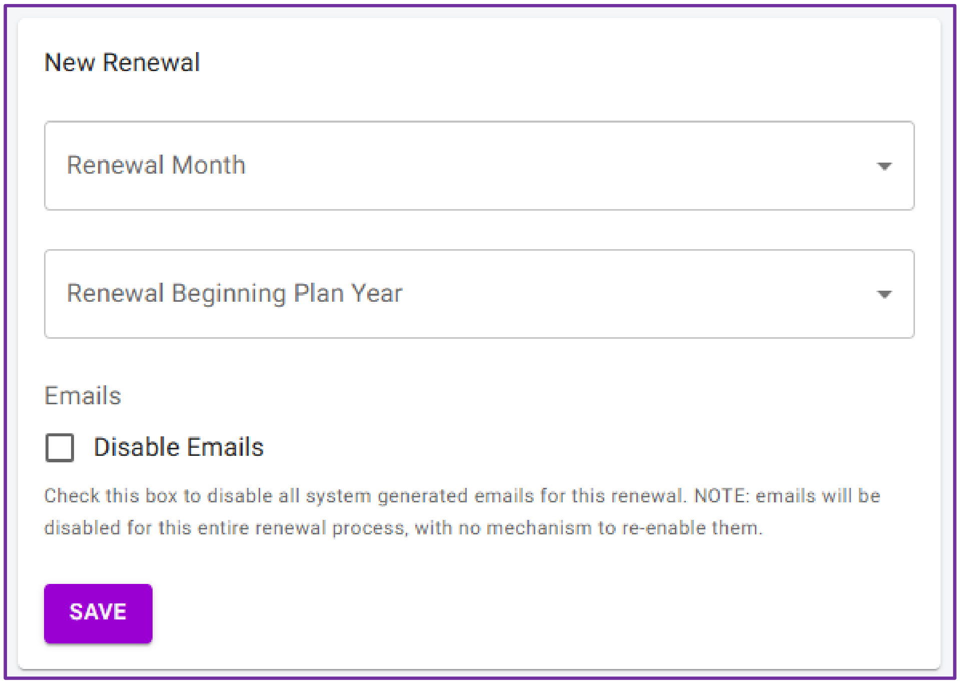
- GA logs into the **Streamline application**.
- Navigate to the company with the upcoming renewal.
- Click **Carriers & Renewals → New** under the Renewal section.



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

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

- Click **Save**.



- **<u>IF DISABLE EMAILS IS NOT CHECKED</u>**, an **automated email** notifies the designated Primary and Secondary Organization that a renewal has been created. The designated GA Renewal Contact will also receive this email.

BBS: Renewal Notification. You have been assigned to Full Stack Pancake Diner renewal: 2025, July. Please complete step: Client Information and Plans Checklist - Initial

N

notifications@dms-datavalidate.com

To: You

Thu 10/23/2025 9:46 AM

Hello

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

Please click here to log in and complete both the Client Information and Renewal Plans Checklist.

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

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

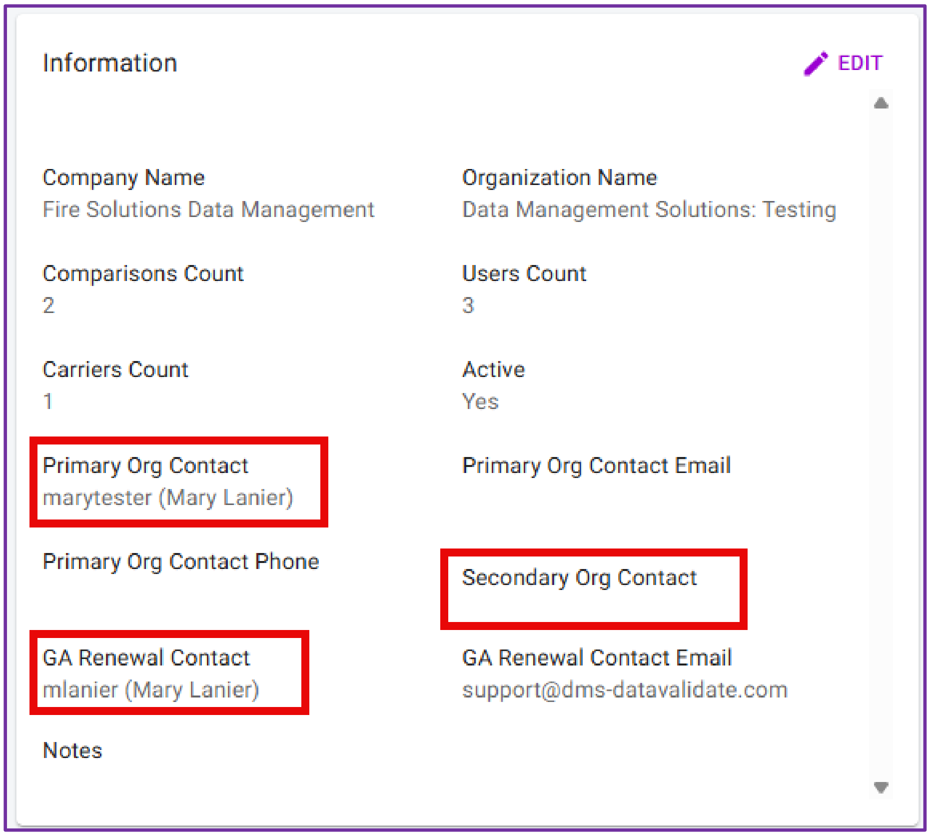
We look forward to partnering with you to ensure a smooth and timely renewal for Full Stack Pancake Diner. If this request should be directed to another contact, please provide their information in the comments. We'll be happy to reassign the task accordingly.

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

Broker Builder Solutions
Your Trusted Partner for Benefits Administration

Data Management Solutions
Validate ▪ Create ▪ Convert

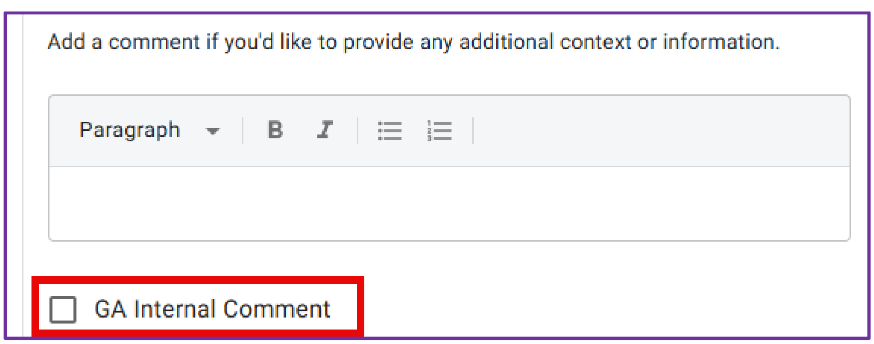
Note: Organization contacts and GA Renewal Contact can be found on the Company Detail page.



Step 2: Organization Completes Client Information

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

    - COBRA Enrollment Type (Active/Passive)
    - Passive Enrollment Button Enabled (Before, After, Both)
    - Send Deductions Date (if payroll integration is present)
    - Custom Enrollment Welcome & Email Language
    - Enrollment Firm Fields – this is optional and applicable to those agencies that are also Enrollment Firms
        - Call Center – A simple **Yes/No** option that indicates whether the organization is requesting call center support for the enrollment.
        - Communication – 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.
    - Comments – Please note that a comment can be added without submitting the Client Information for GA Review. The comment can also be marked as an Internal Comment and restricted to GA user view only.



    - Close Renewal

- Click **Submit Client Information** → GA is notified for review.

Note: The **Close** and **Delete Renewal** options are available only on the **Client Information** step of the Renewal Wizard.

The **Close** option is designed for renewals marked as *Broker Managed*. It allows agents to close a renewal without completing the remaining steps, preventing any additional email notifications that would typically be triggered later in the process.

Once a renewal is closed:

- It will appear in the renewal list with a **Closed** status instead of **Completed**
- Only **Agency users** have permission to perform this action
- The renewal **cannot be reopened**

If a renewal was created in error, it can be deleted after being closed. Deleting a renewal will:

- Permanently remove it from the carrier page renewal list
- Prevent it from being recovered

Client Information

RESEND RENEWAL KICKOFF EMAIL

Last sent 7/7/2026. Notification count: 1.

Complete the form below to submit information for this renewal to the GA Renewal Contact for review.

Broker Managed Details

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

Enrollment Firm Fields

These fields apply only to Enrollment Firm agencies and are not required otherwise. For any questions, reach out to your dedicated enrollment firm contact.

Call Center

Communication

Census

The census file should be an excel or csv file inclusive of the Employees' First Name, Last Name, and either an Email Address or Phone Number, depending on the selected communication method.

No Census found.

ADD FILE

Comments

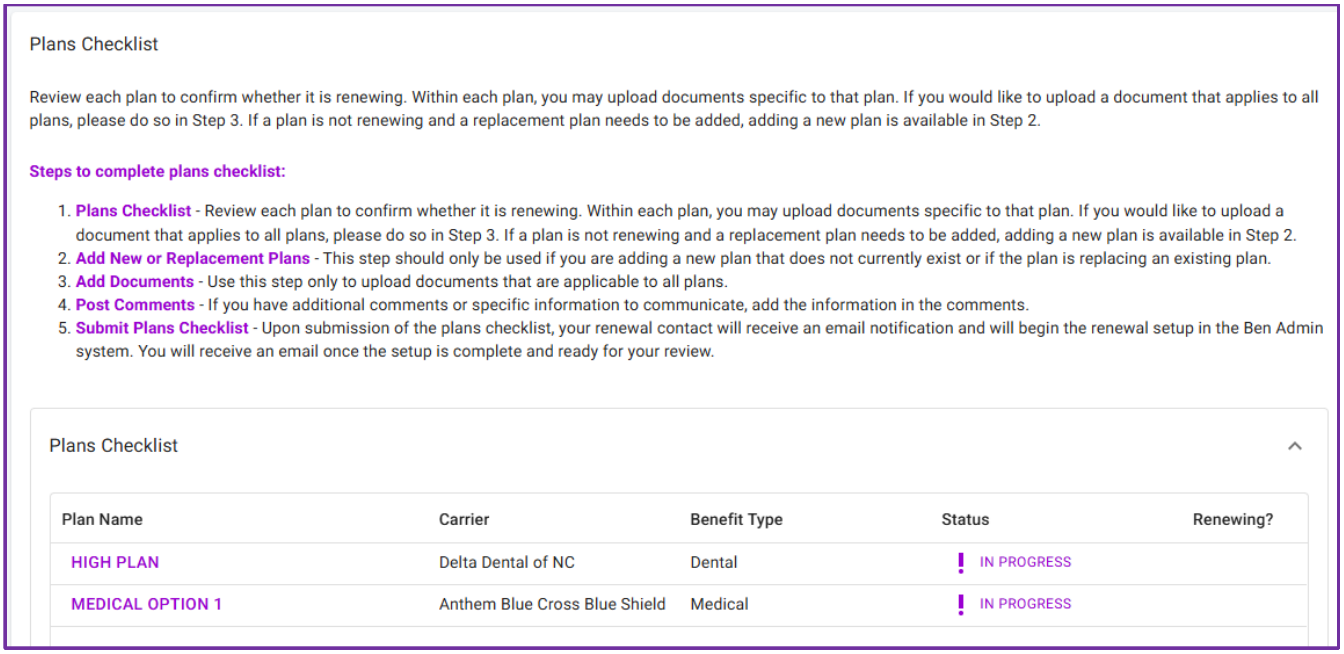
SKIP

SUBMIT CLIENT INFORMATION

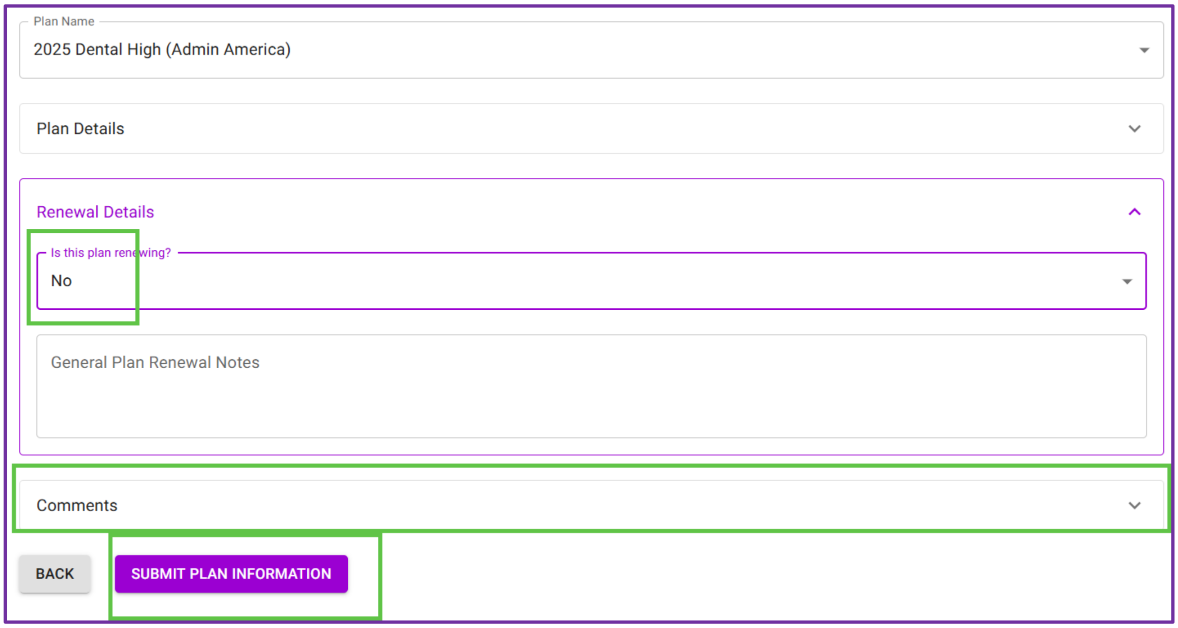
CLOSE RENEWAL

Step 3: Organization Completes Plans Checklist

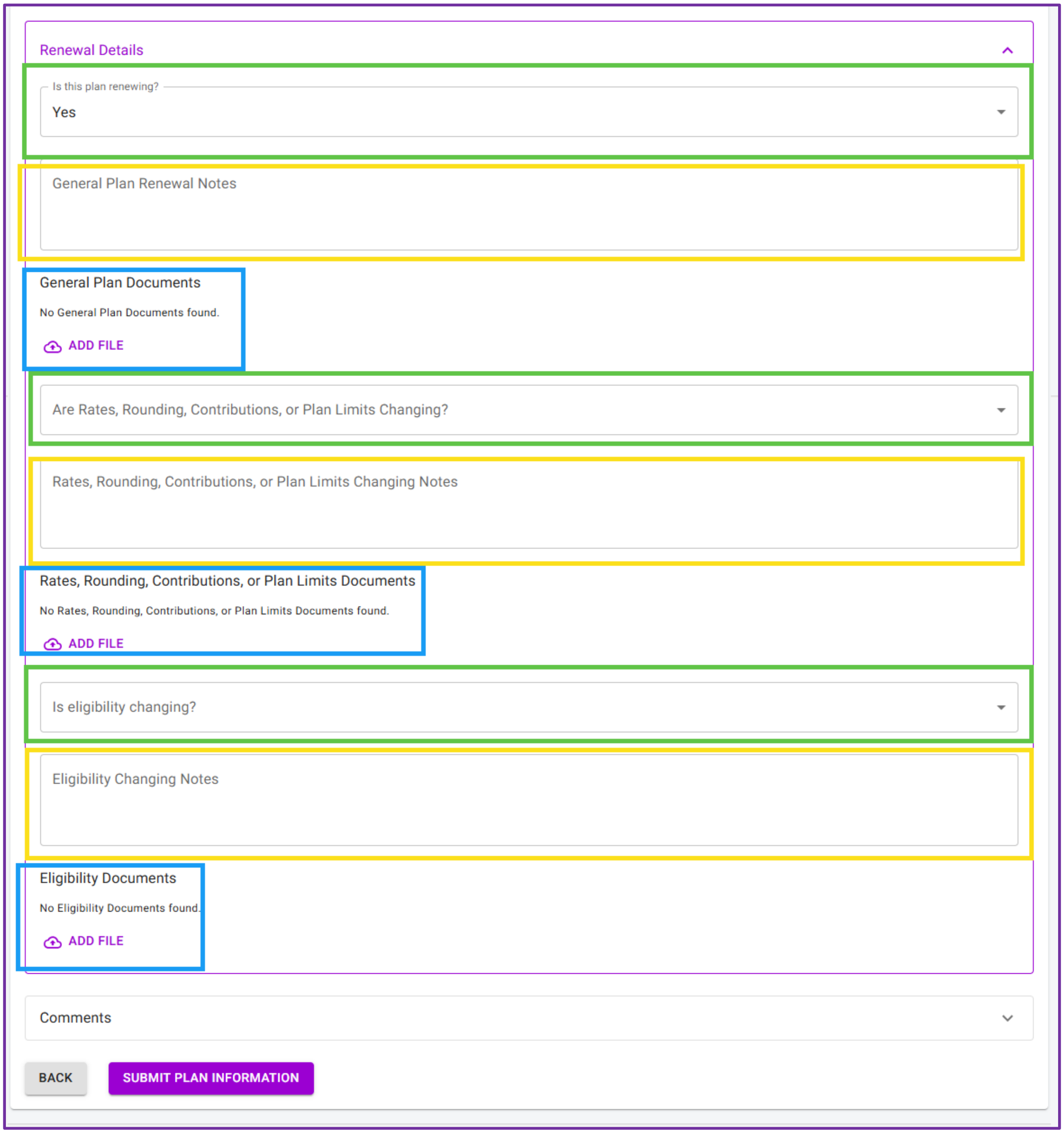
- For each listed plan click the **Plan Name** or **Status** to review:



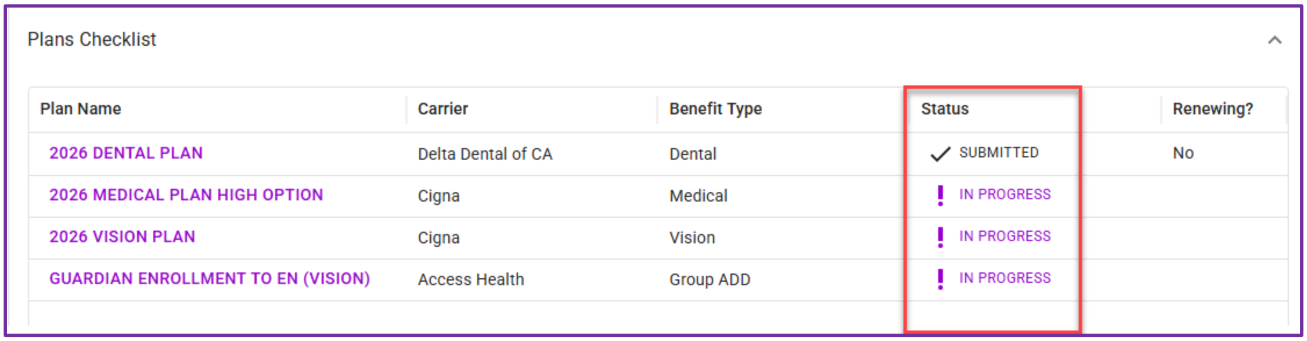
  - If **not renewing** →
    - Select NO and add additional information to the General Plan Renewal Notes and/or Comments to indicate if the carrier is being replaced by another or any other pertinent information for the GA contact.
    - Click **Submit Plan Information** (status changes to Submitted).



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



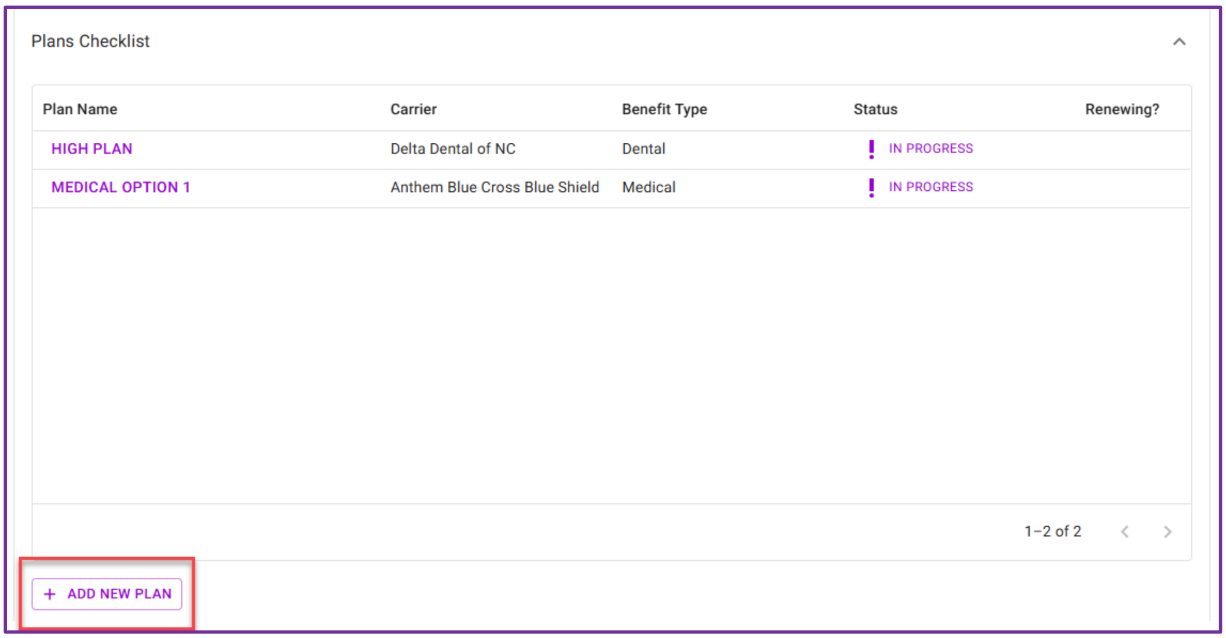
- Click **SUBMIT PLAN INFORMATION** once all selections have been made for the specific plan.
- Repeat the process above for each plan listed until all statuses have been changed from IN PROGRESS to SUBMITTED.



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



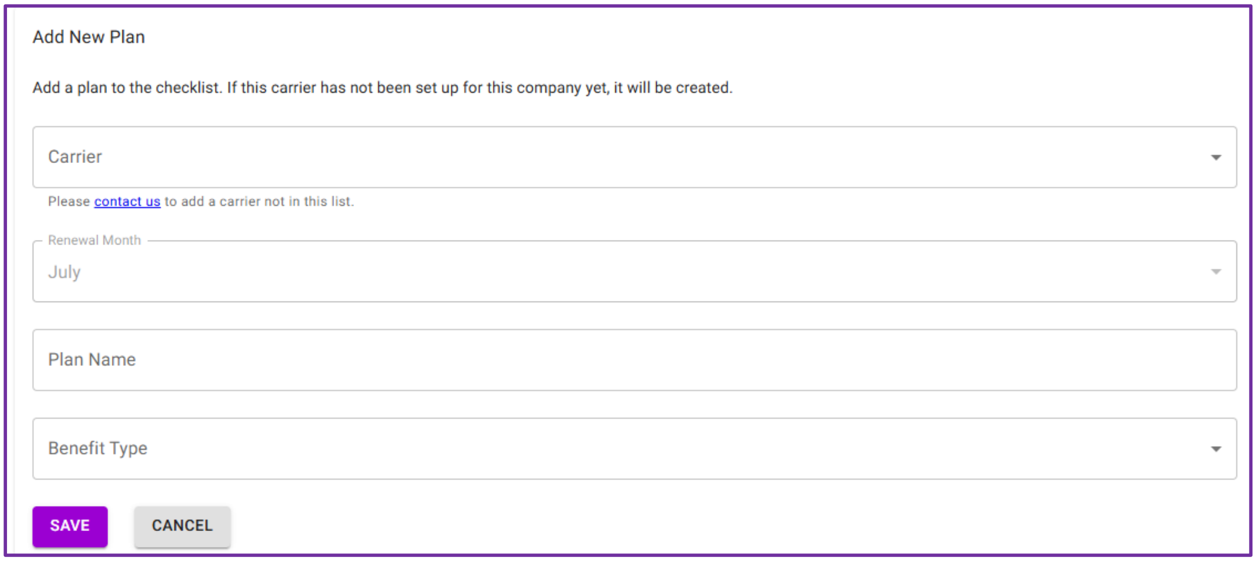
Plans Checklist

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

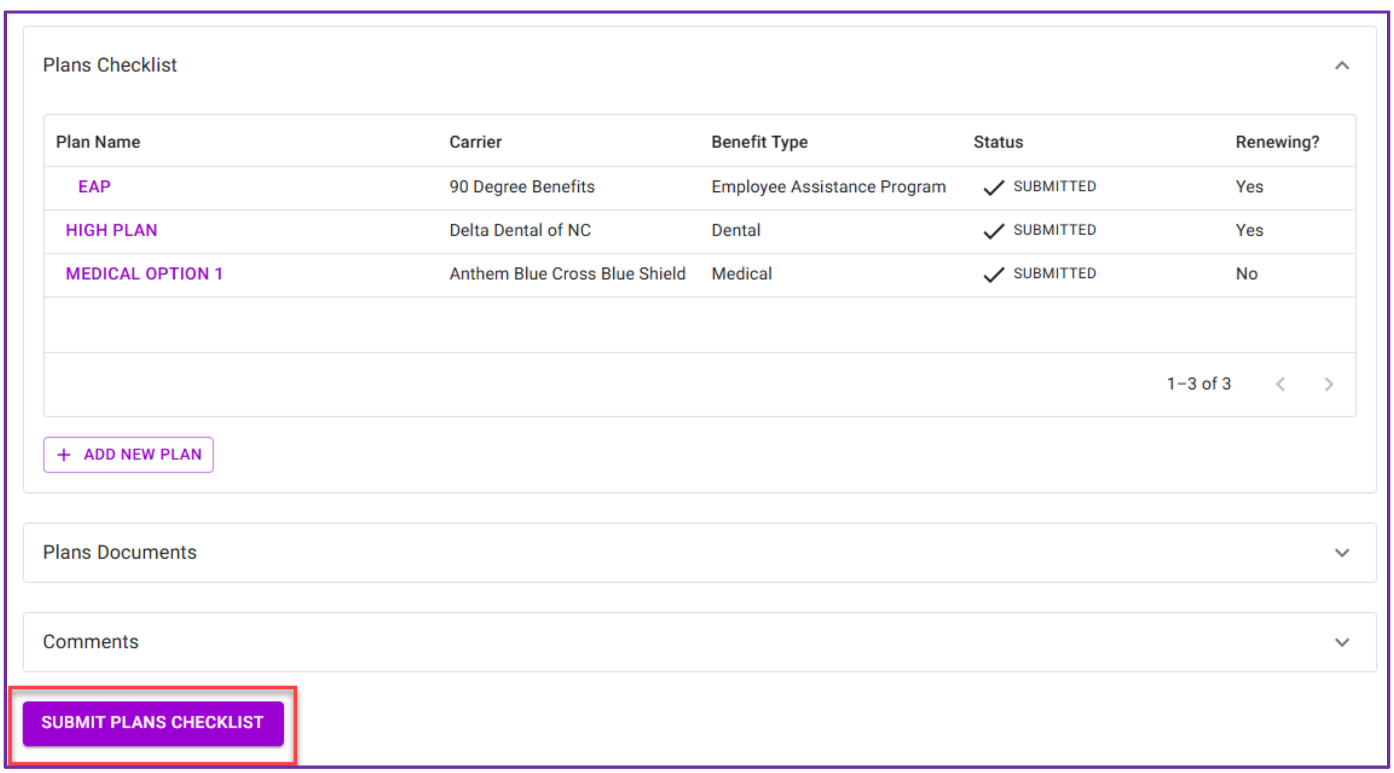
+ ADD NEW PLAN

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



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

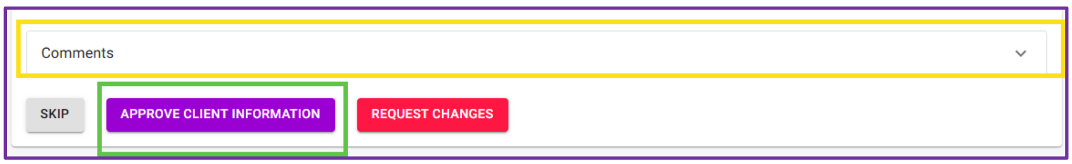
- **Plans Documents** includes an upload option for files that apply to all plans. This allows users to upload shared documents once, eliminating the need to upload the same file separately for each plan.
- Once all plans are submitted, add any applicable comments and then click **Submit Plans Checklist**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



Step 4: GA Reviews & Collaborates

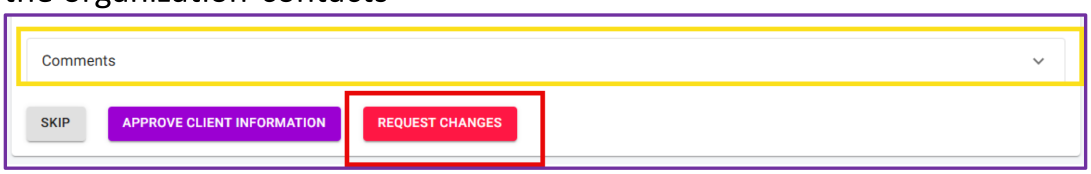
- GA will receive an email when the Organization contact completes the Client Information and/or Plans Checklist.
  - **GA Review Client Information – Approval**

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



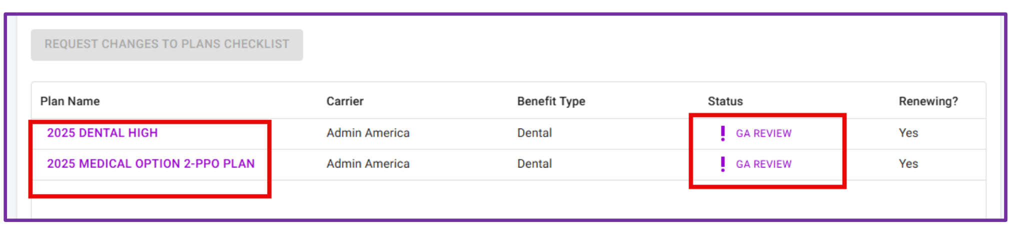
  - **GA Review Client Information – Request Changes**

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

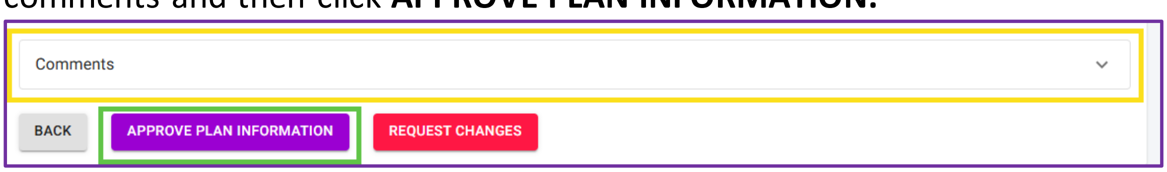


  - **GA Review Plans Checklist – Approval**

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

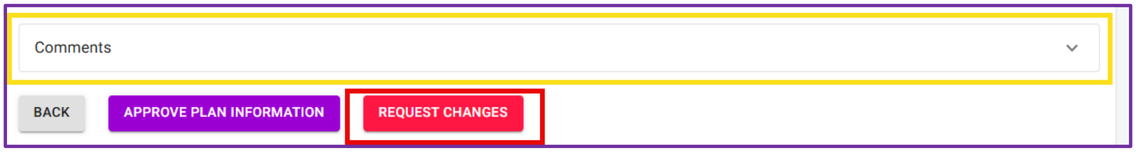


If all required information and documents have been provided by the organization contacts and no further details are needed, the GA should add any desired comments and then click **APPROVE PLAN INFORMATION.**



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

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



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

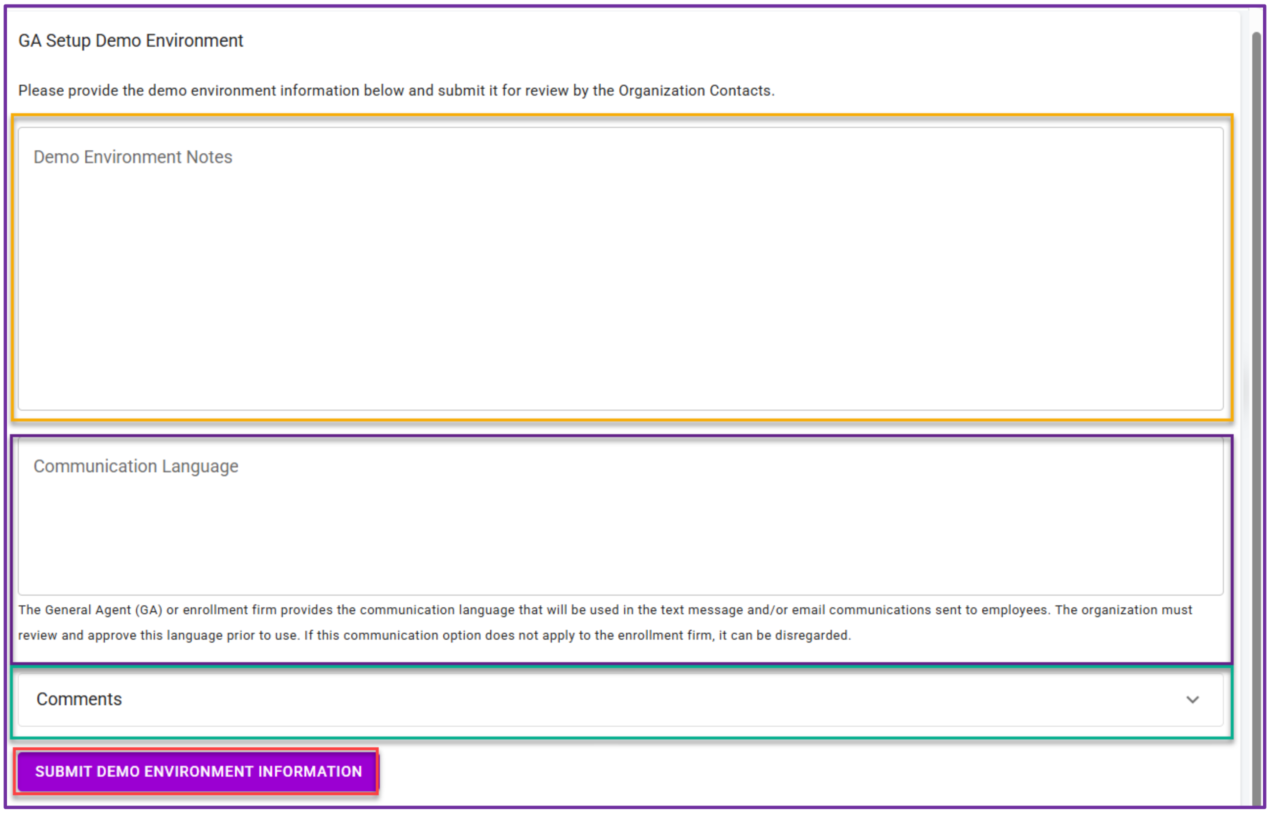
Steps 5 & 6: Testing & Go Live

Once the Client Information and Plans Checklist steps have been approved, the Demo Environment can be configured within the Benefit Administration System.

On Step 5, the General Agent enters the required testing details, including demo user information and any applicable instructions, in the Demo Environment Notes section.

If one or more Communication Options were selected during the Client Information step, the Communication Language section will become available for the General Agent to complete. Additional comments and supporting files can also be added as needed.

Once all required information has been entered, click **SUBMIT DEMO ENVIRONMENT INFORMATION** to complete this step.



- 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.

Communication Language

Communication language can be added here by the General Agent

The General Agent (GA) or enrollment firm provides the communication language that will be used in the text message and/or email communications sent to employees. The organization must review and approve this language prior to use. If this communication option does not apply to the enrollment firm, it can be disregarded.

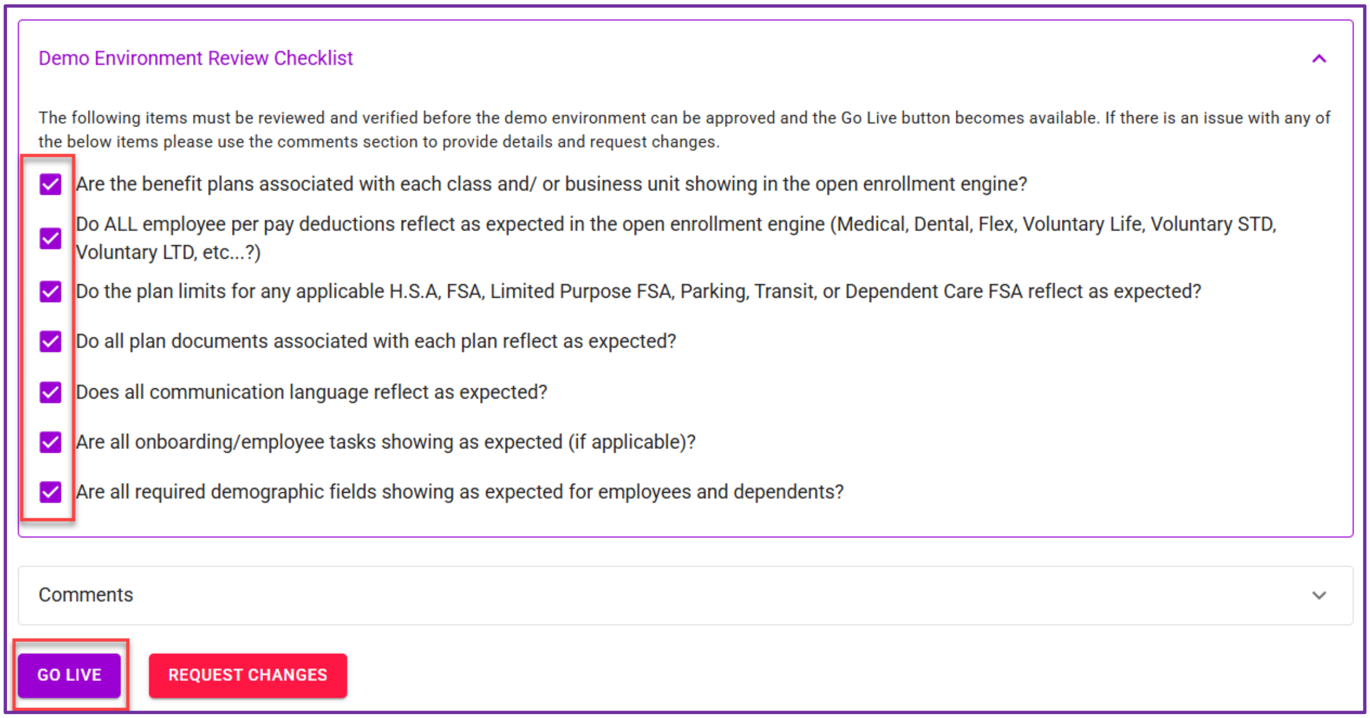
Demo Environment Review Checklist

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 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

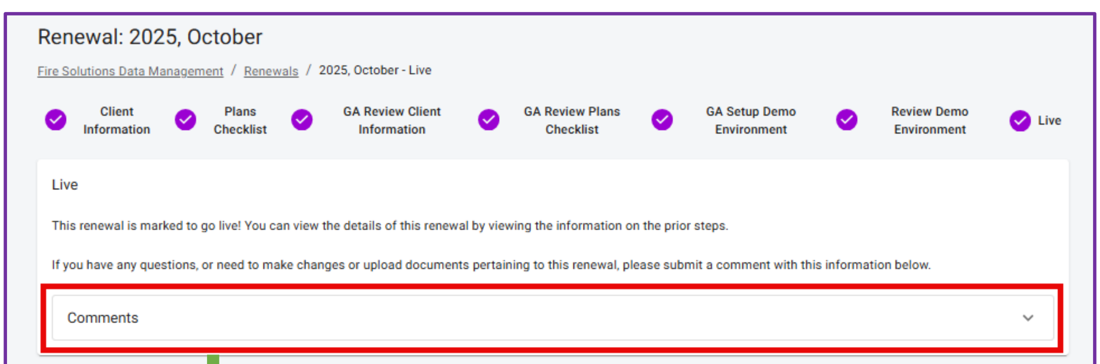
GO LIVE | REQUEST CHANGES

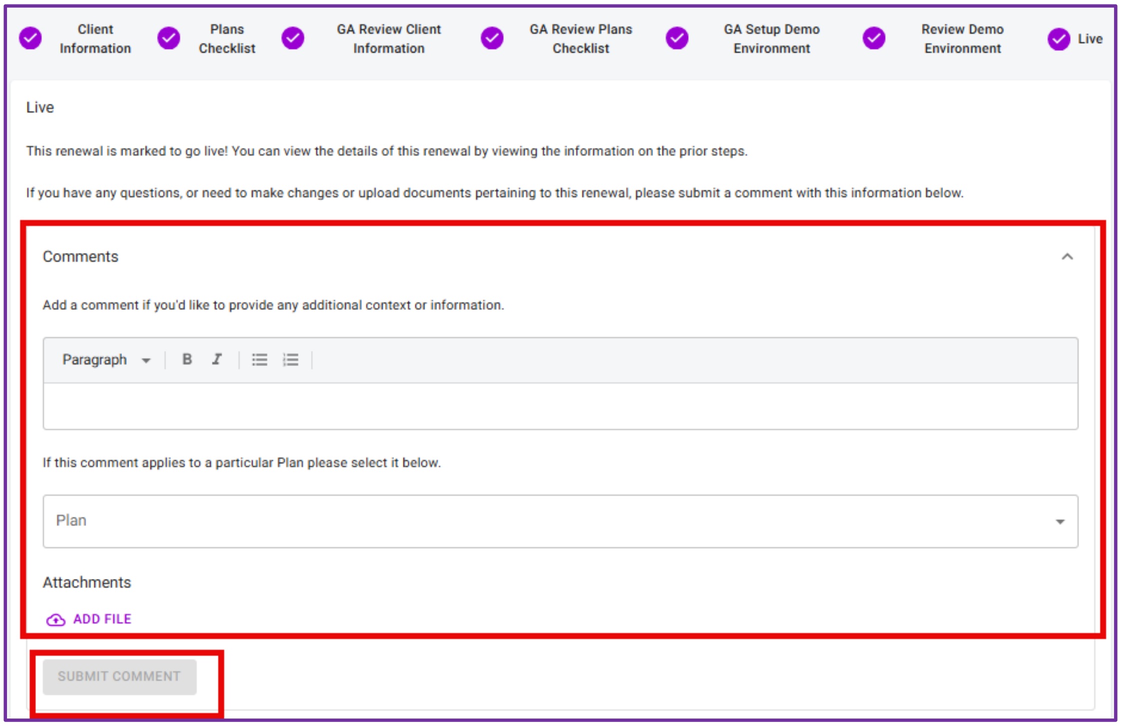


Step 7: Renewal Completion

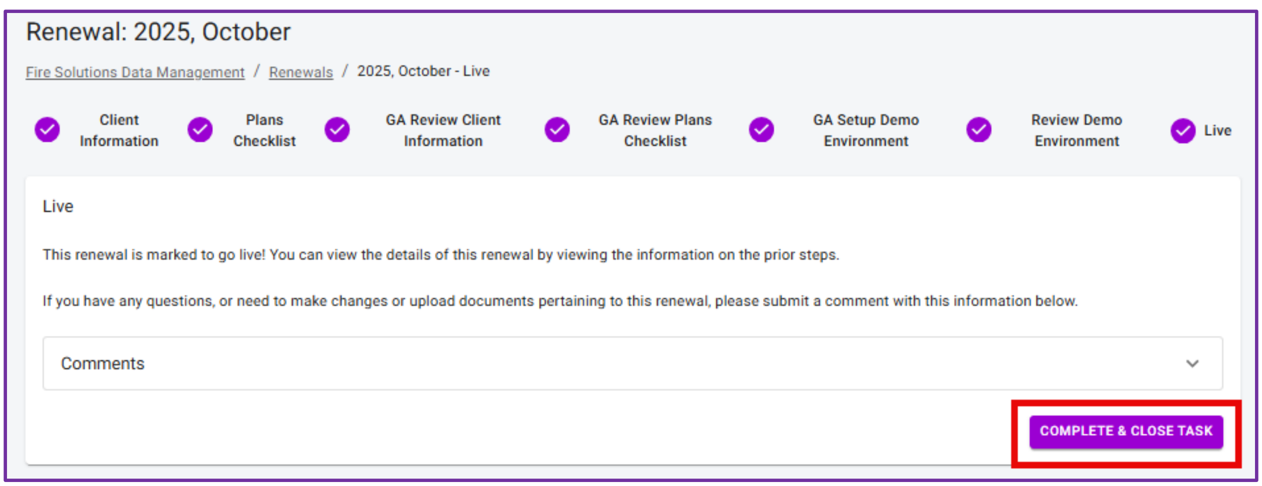
- Once live, the renewal is **locked**—previous steps cannot be reopened.
- Post-Go Live:

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





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

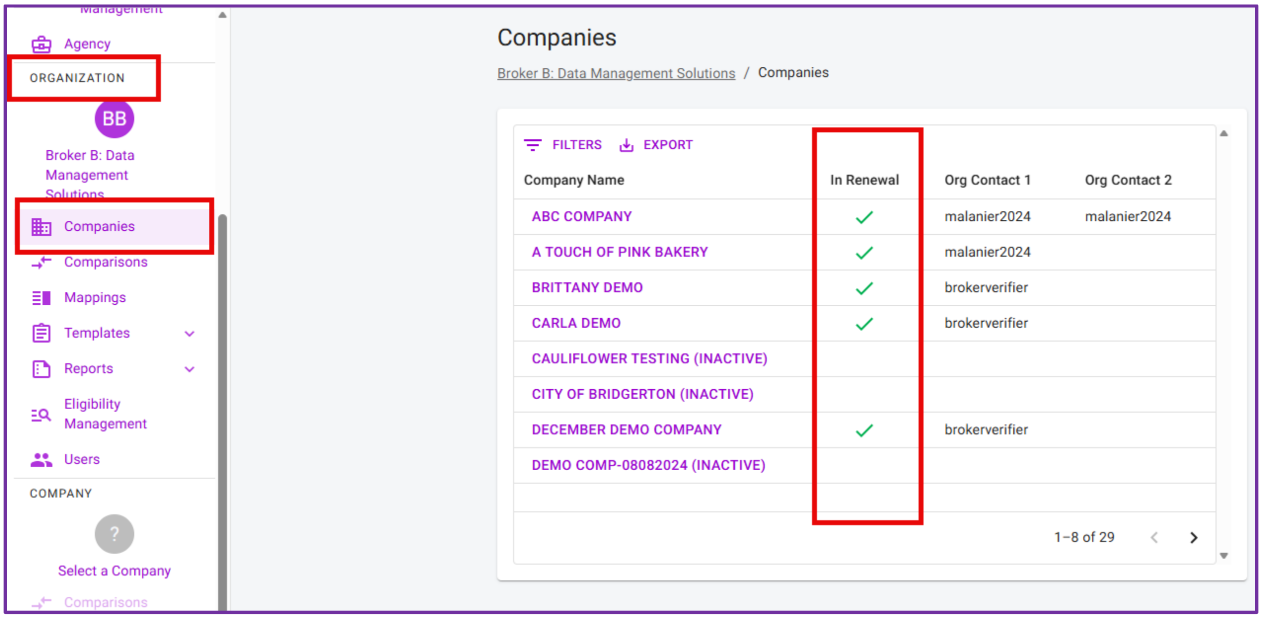


- A **final closeout email** is sent, marking the renewal complete and ready for the next cycle.

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

Companies Table for Renewals

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



Eligibility Management Tracking

The Eligibility Management Tracking module is designed to streamline and record all manual enrollment handling activities. This module supports tracking for recurring eligibility management, open enrollment (OE) manual processing, carrier error reports, and issues related to carrier files.

To ensure complete visibility, users can log the method of processing, timeframes, assigned staff, and relevant enrollment counts.

Creating a new Eligibility Management Task is straightforward, but there are a few rules to keep in mind. **All task types can be created by an Agency User** and may be created at **three levels**:

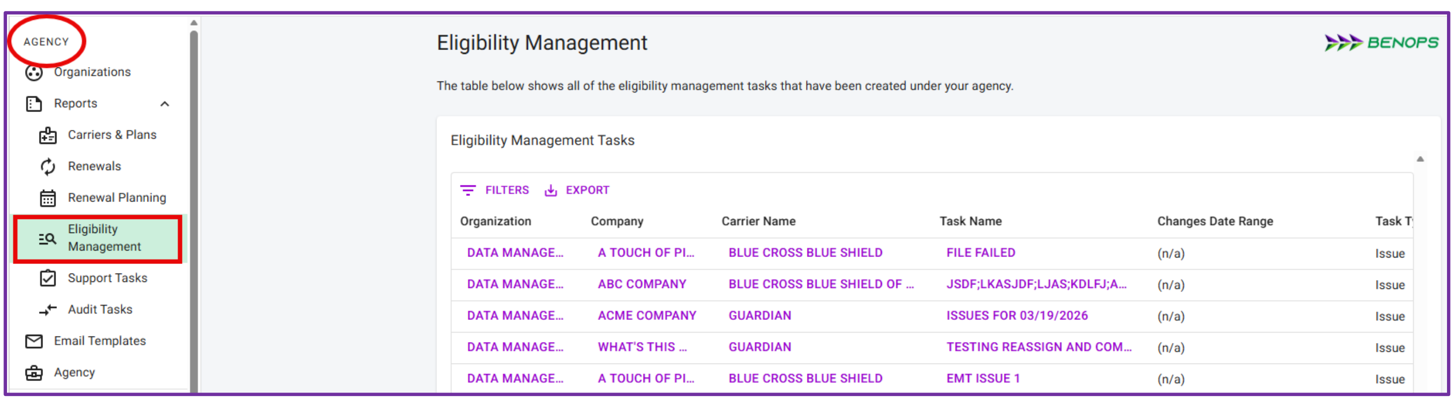
- **Organization level**
- **Company Level**
- **Company Carrier level**

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

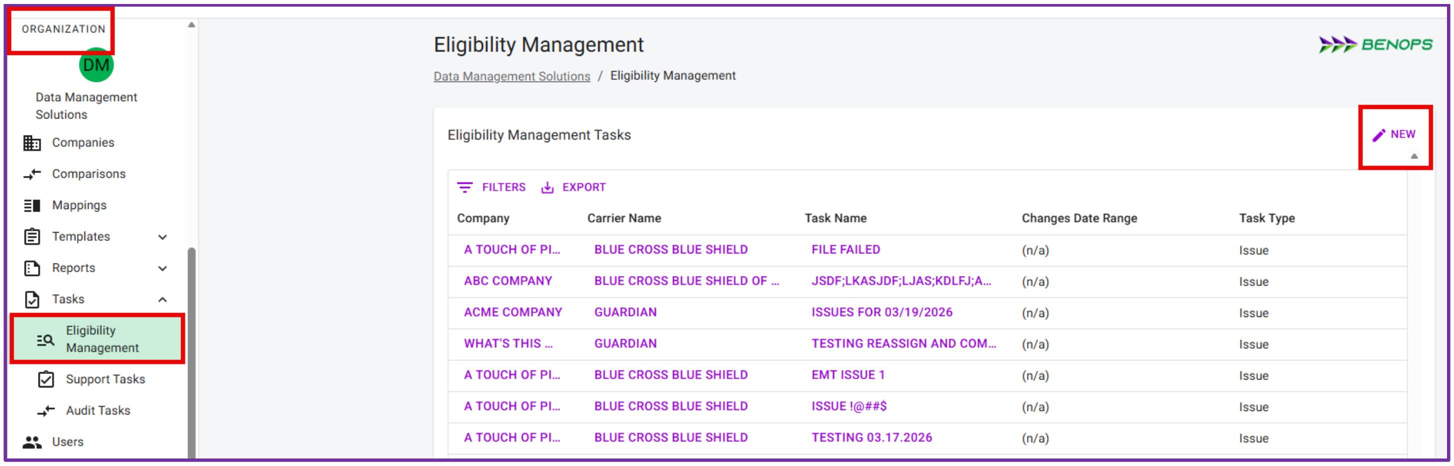
Tasks **cannot** be created at the Agency level, although they **can be viewed and exported** there.

Eligibility Management Tracking Tables:

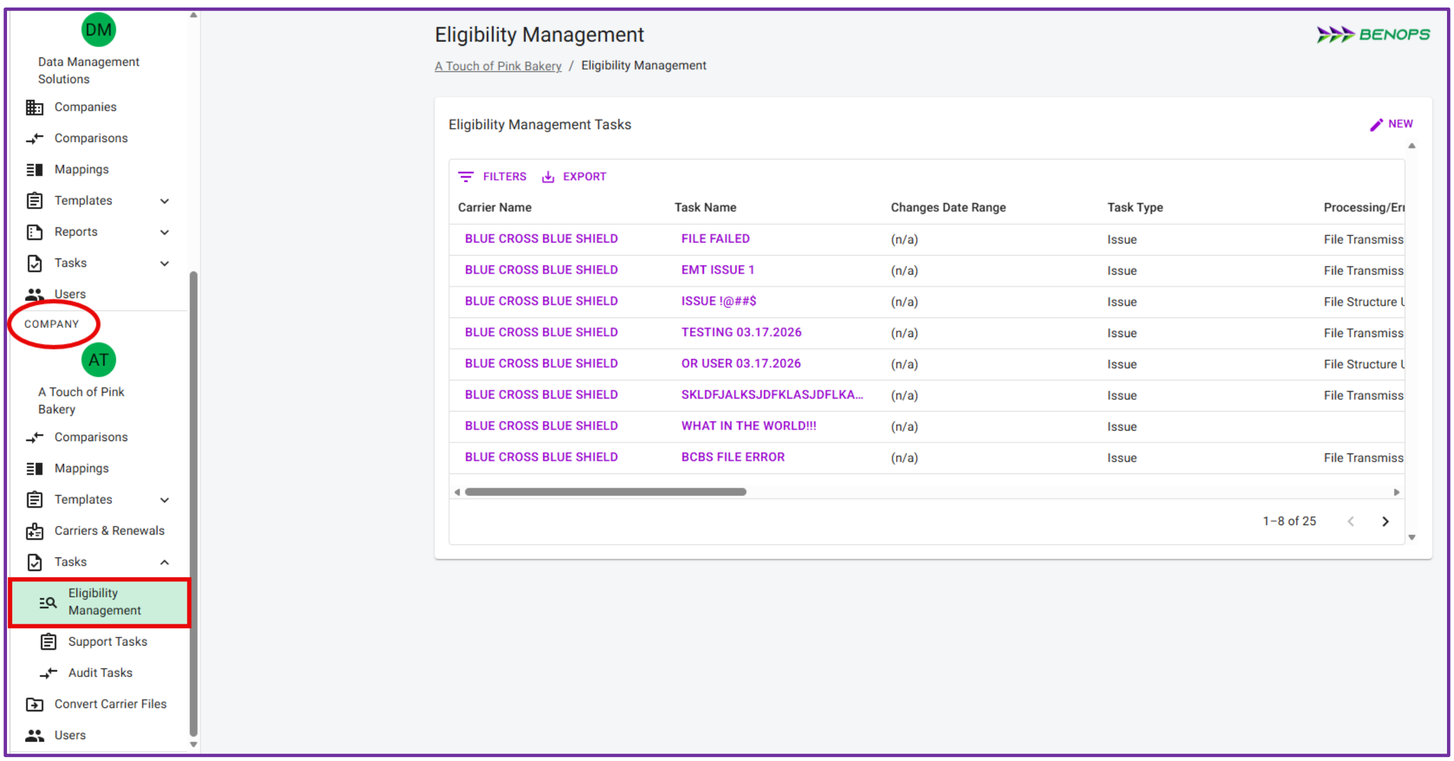
Agency:



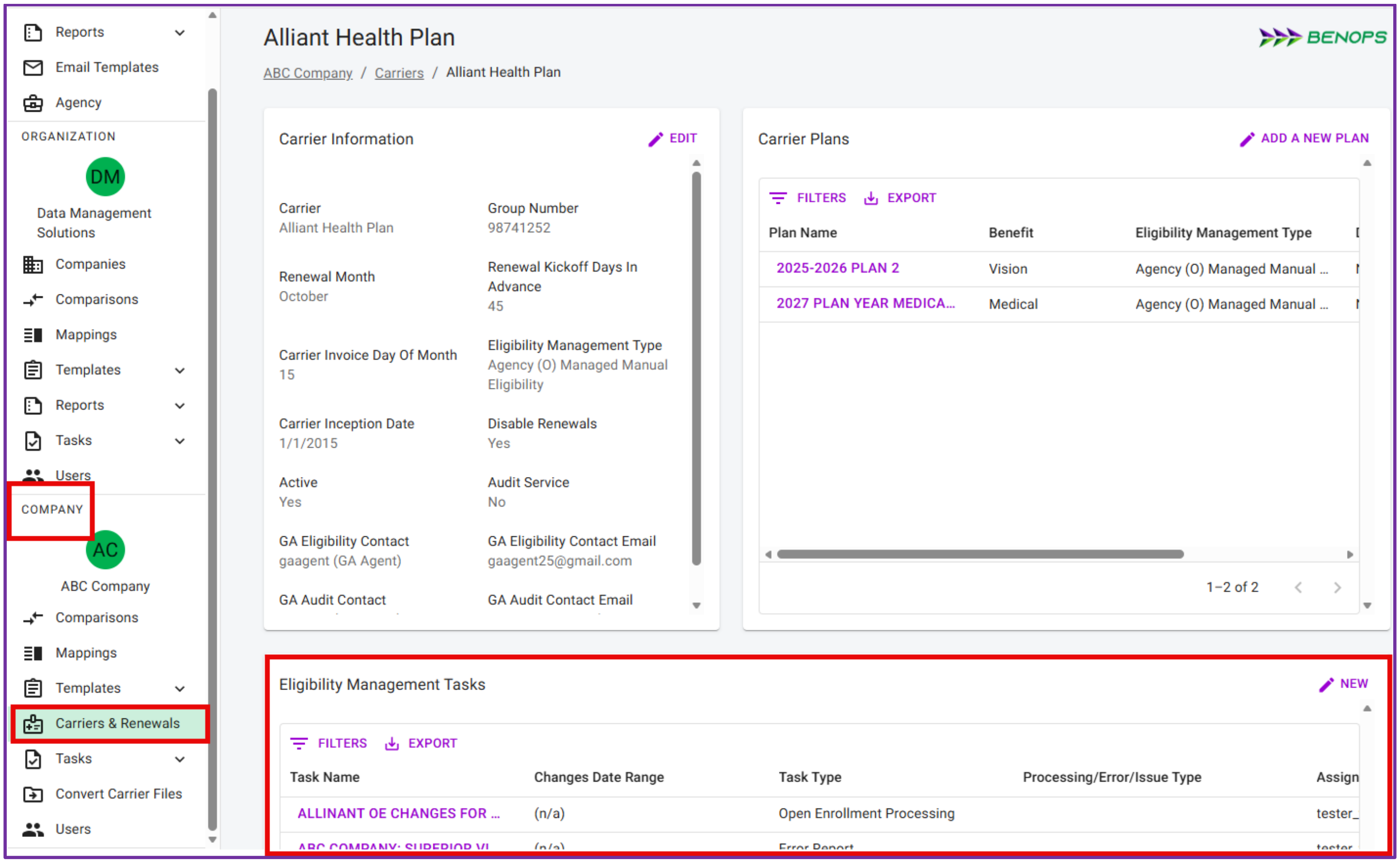
Organization:



Company:



Company Carrier Level:

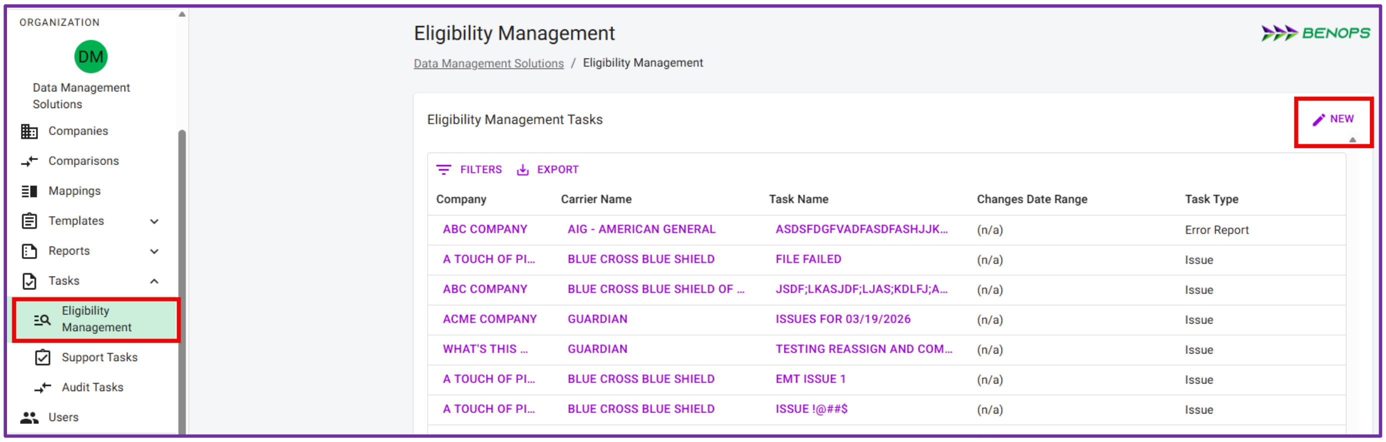


The fields presented will vary slightly depending on where the task is created and what task and issue type is selected.

- When created at the **organization level**, you will need to manually select both the company and the carrier.
- When created at the **company level**, the company is pre-populated for you.
- When created at the **company carrier level**, the company and carrier information is pre-populated for you.

How It Works

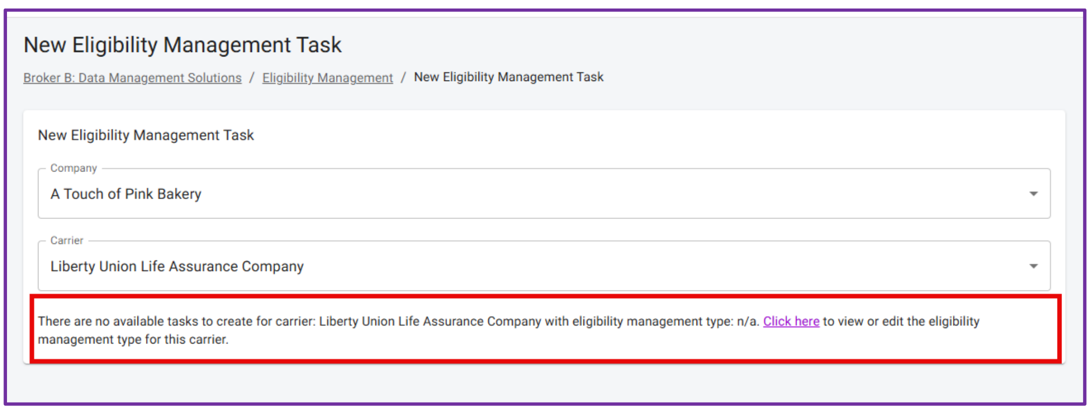
1. **Navigate to the organization or company** where the task will be created.
2. Select **Eligibility Management** from the left menu under **TASKS**, then click **NEW**.



Company & Carrier Selection

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

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

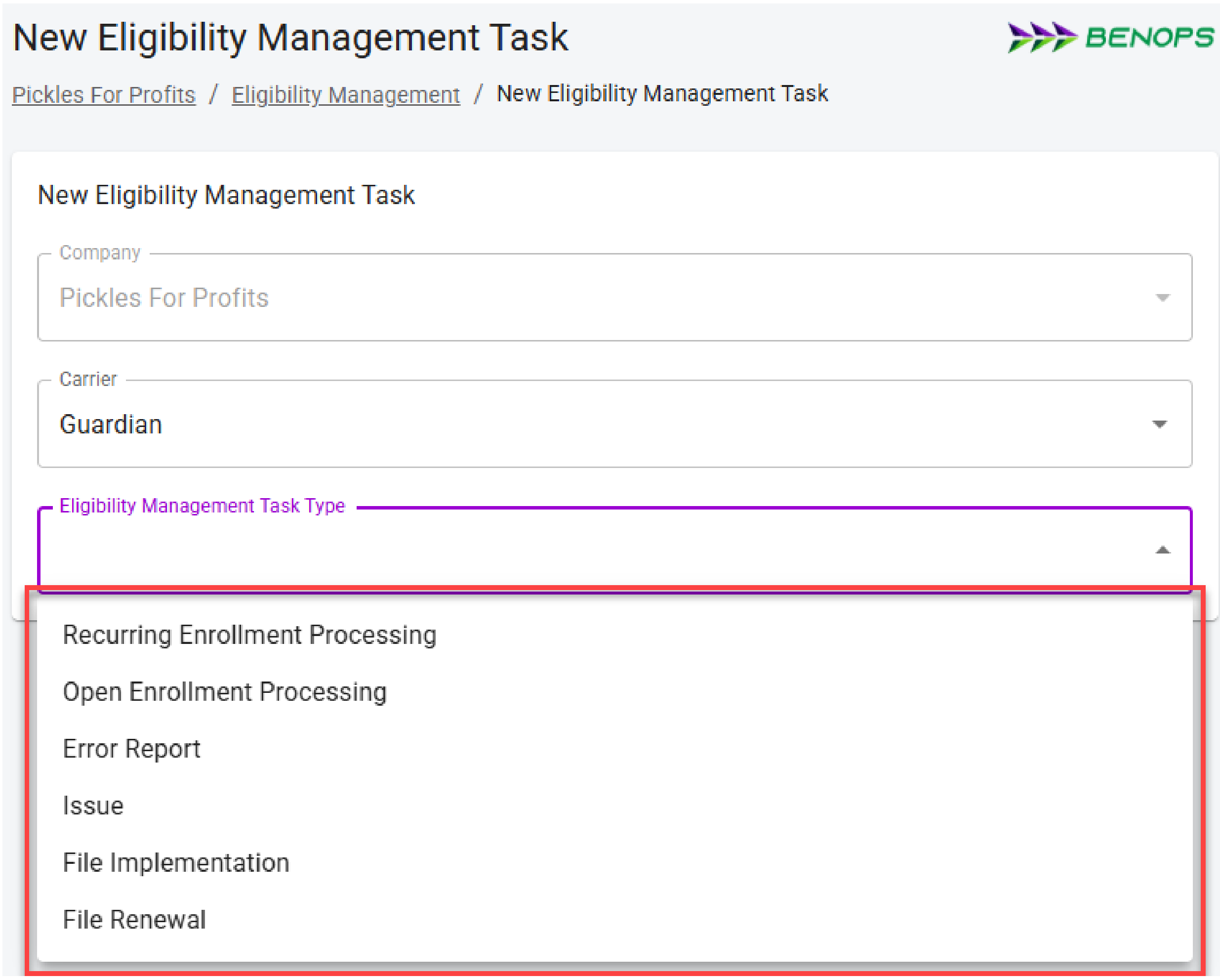


Select the Eligibility Management Task Type

Choose from the dropdown:

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

5. **File Implementation** – for new carrier implementations
6. **File Renewal** – for carrier renewals



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:

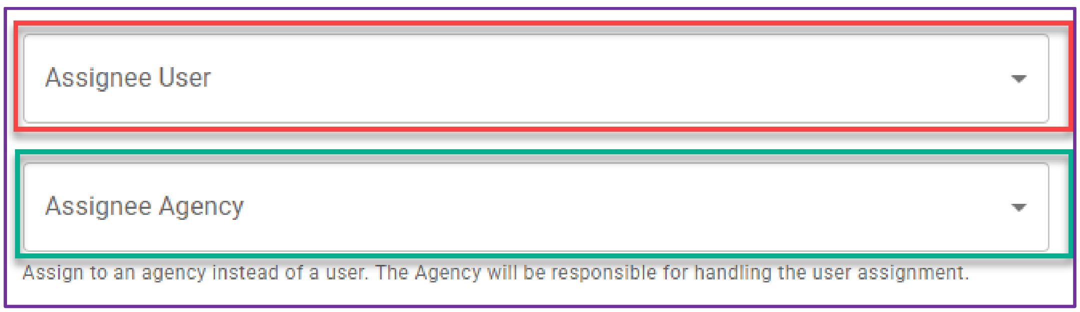
- *Blue Cross: Weekly 12/15/25 – 12/21/25*
- *Blue Cross: November 2025 OE*

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

ASSIGNEE or an **ASSIGNEE AGENCY:**

- **Assignee:** Select an individual user from the dropdown menu. The list includes applicable users from the Agency Administrator connected to the Organization.
- **Assignee Agency:** Select from the agencies connected to the Organization. When an agency is selected, notifications are automatically sent to the agency's default support email address.

Only one assignment type can be selected at a time—either an individual user or an agency.



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

CHANGES FROM DATE: Enter or select the beginning date of the change window.
Example: For changes from 12/15/2025 to 12/21/2025, the "From Date" is **12/15/2025**.

CHANGES TO DATE: Enter or select the ending date of the change window.
Example: **12/21/2025**

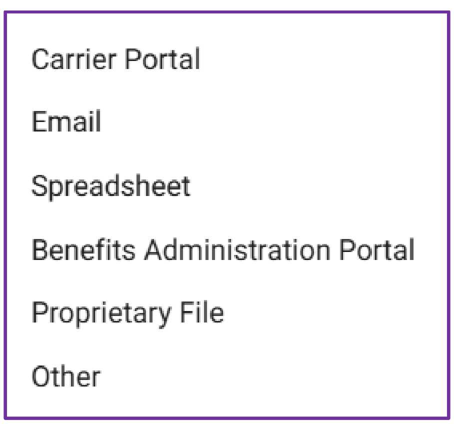
***** If open enrollment changes, the changes from and to ARE OPTIONAL. However, it is recommended to use the first day of the new plan year. Example: November 2025 open enrollment will reflect 11/01/2025 as both the from and to date.**

Changes Source Type: Select how the changes are determined.

Manual Processing Type

Choose how the changes were processed:

1. **Carrier Portal** – changes keyed directly in the carrier portal
2. **Email** – changes submitted in the body of an email
3. **Spreadsheet** – changes submitted via an attached spreadsheet
4. **Benefits Administration Portal –** changes submitted in Benefits Administration Portal
5. **Proprietary File –** changes submitted via a proprietary file
6. **Other** – any method not covered above



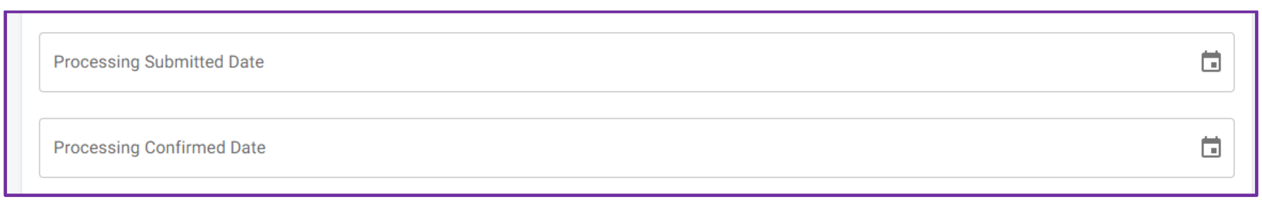
Required Counts for Completion:

These fields are required for all processing types.
The task may be saved with these fields blank, but **cannot be completed** until they are filled in.

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

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

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



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

Required Fields for Creating an Error Report Task

NAME: Enter a unique task name (required per company).
Best practice is to include both the **carrier's name** and the **date range** of the changes or other information to create a unique name that is not repeatable for the specific company.
Examples:

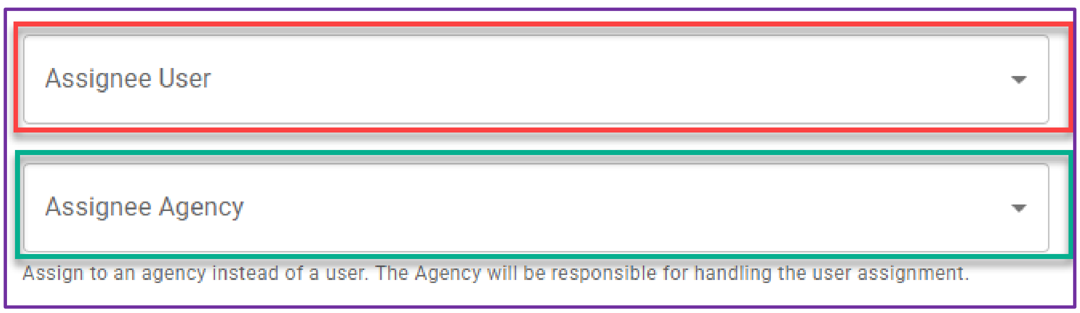
- *Blue Cross: Weekly 12/15/25 – 12/21/25*
- *Blue Cross: November 2025 OE*

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

ASSIGNEE or an **ASSIGNEE AGENCY**.

- **Assignee:** Select an individual user from the dropdown menu. The list includes applicable users from the Agency Administrator connected to the Organization.
- **Assignee Agency:** Select from the agencies connected to the Organization. When an agency is selected, notifications are automatically sent to the agency's default support email address.

Only one assignment type can be selected at a time—either an individual user or an agency.



The assigned user or agency 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.

Additional Required Fields for Completion:

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

ERROR REPORT RECEIVED DATE: Select when the error report was received.

ERROR RECEIVED: Select Yes or No to indicate that the carrier error report contained errors.

Processing Submitted Date – date error resolutions were sent to the carrier or responsible party

Processing Confirmed Date – date error resolution confirmation was received

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

<u>Required Fields for Creating an Issue Task</u>

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 OR ASSIGNEE AGENCY: Select the user or agency responsible for completing the task.

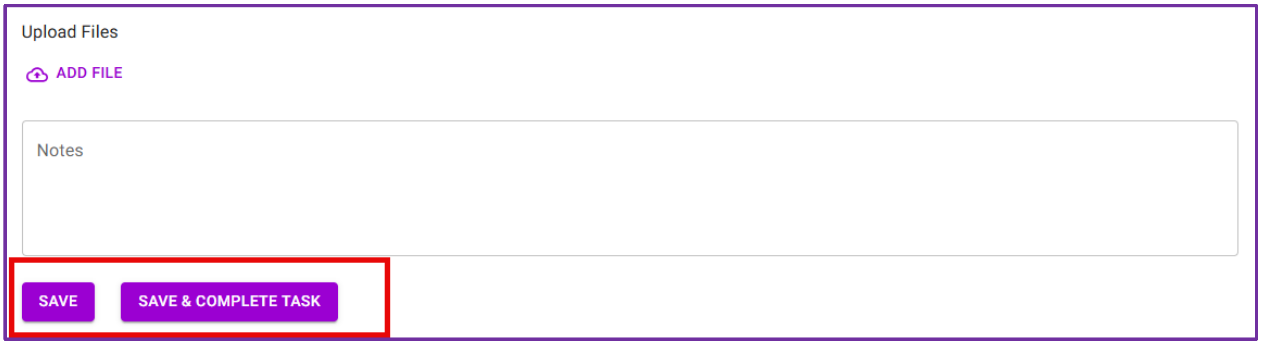
ISSUE TYPE: Select the issue for this task.

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

Final Steps for all Task Types

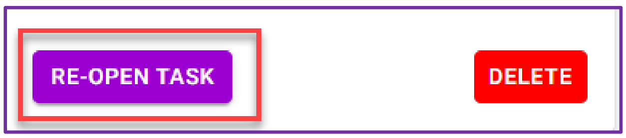
- Add any relevant details in the Comments and/or Supplemental Information sections.
- Click **SAVE** or **SAVE & COMPLETE TASK**.

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

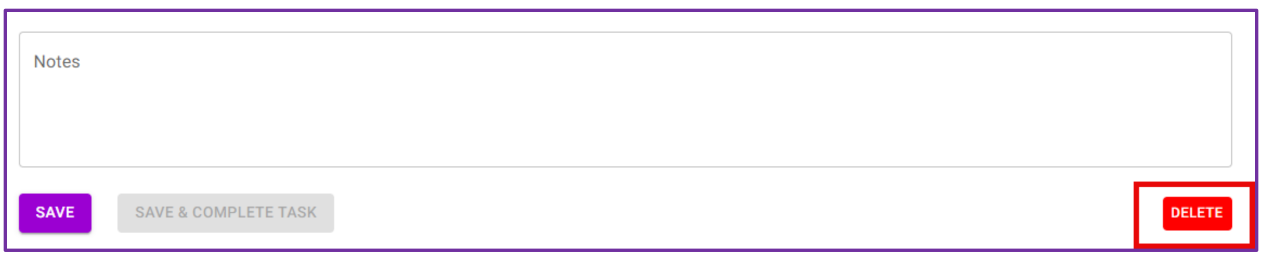


Important Notes

- A completed task can be reopened if necessary.



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



Support Tasks

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

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

- Plan Build
- Broker Support
- HR Support
- ACA
- Compliance
- Reporting
- Post Renewal
- Import Issue
- Renewal Notes
- Post Implementation
- Implementation Notes
- Client Termination
- Plan Build Change
- Other

The Support Task module is designed to capture and track items that are not related to recurring enrollment processing, open enrollment, error reports, or issue workflows—helping improve organization and visibility of support-related activities.

Organization User Access

Organization users with **Admin, Comparer, or Task access** can create Support Tasks to log non-enrollment-related requests. When creating a task, Organization users can select the task type but **cannot assign the task**.

Instead, the task is automatically routed to the Agency’s designated support email, as defined on the **Agency Detail** page.

Agency User Access

Once a Support Task is created, **Agency users** can review and reassign the task as needed. This ensures proper routing, ownership, and follow-up.

Benefits

- Centralizes support-related requests within the platform
- Improves visibility and tracking of non-enrollment tasks
- Enhances accountability and communication between organizations and agencies

Examples

Common uses for Support Tasks include:

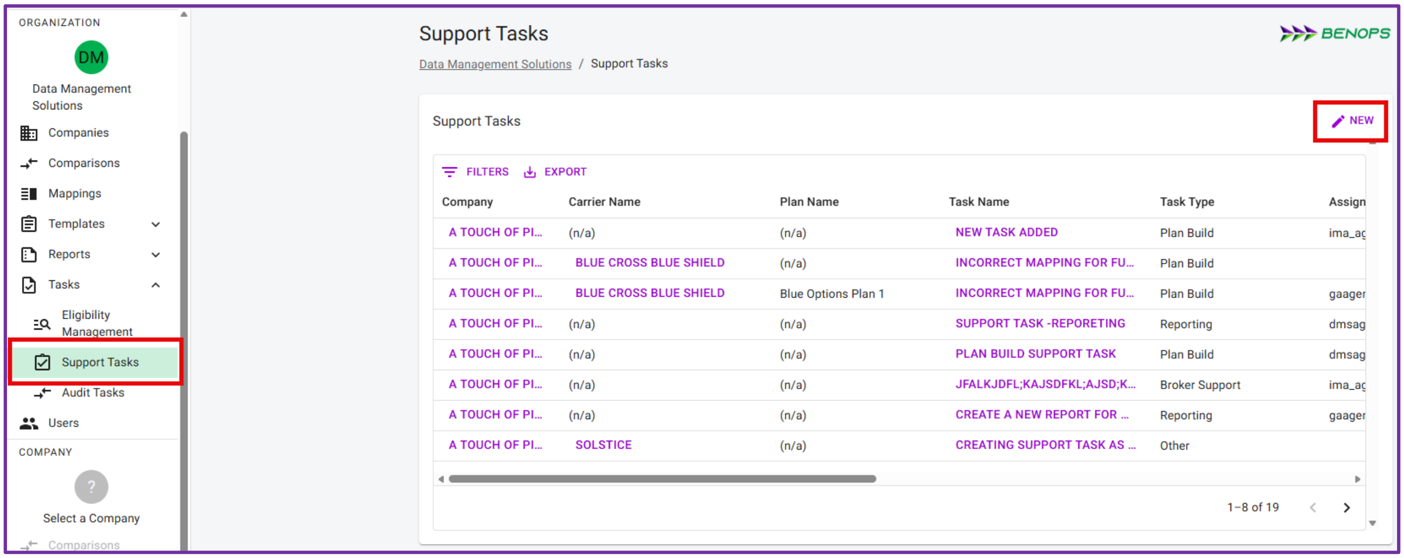
- Submitting an ACA-related question
- Reporting an incorrect plan build
- Requesting general broker or HR support

The fields presented will vary slightly depending on where the task is created and what task and issue type is selected the same as the Eligibility Management tasks from earlier.

- When created at the **organization level**, you will need to manually select both the company and the carrier (optional).
- When created at the **company level**, the company is pre-populated for you.
- When created at the **company carrier level**, the company and carrier information is pre-populated for you.

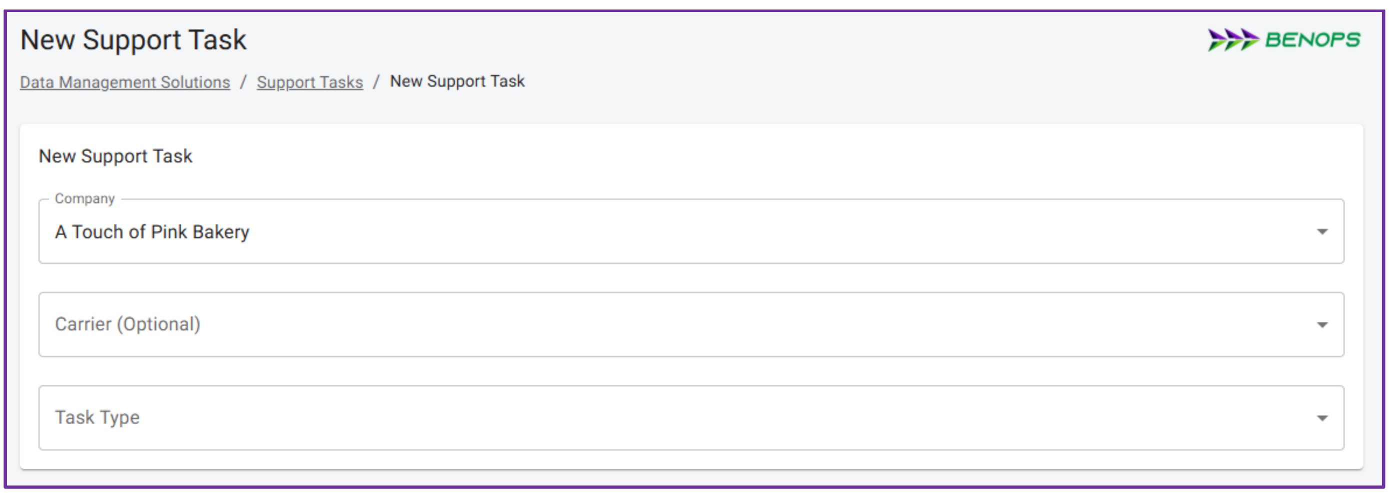
How It Works

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



3. Company & Carrier Selection

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



4. Task Type

- Select **task type** from the dropdown.

Required Fields for Creating a Support Task

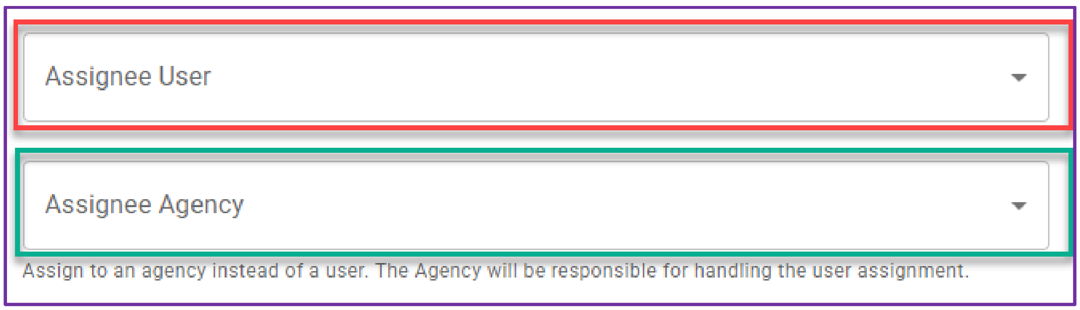
NAME: Enter a unique task name (required per company).

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

ASSIGNEE or an **ASSIGNEE AGENCY**.

- **Assignee:** Select an individual user from the dropdown menu. The list includes applicable users from the Agency Administrator connected to the Organization.
- **Assignee Agency:** Select from the agencies connected to the Organization. When an agency is selected, notifications are automatically sent to the agency's default support email address.

Only one assignment type can be selected at a time—either an individual user or an agency.



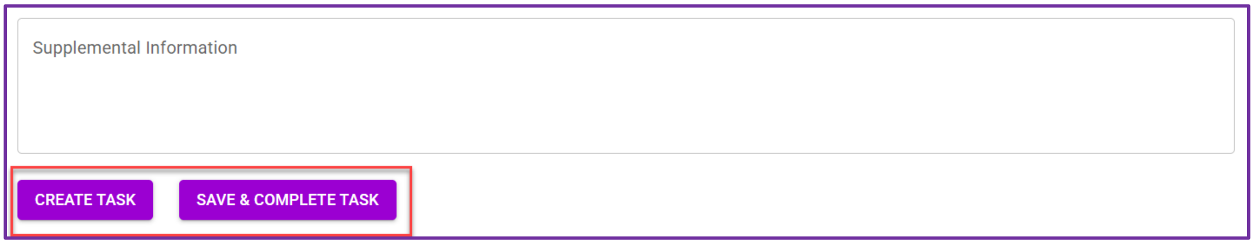
The assigned user or agency will receive an email notification indicating that a new task has been assigned to them, along with a direct link to the task so they can access it without navigating through the application. If the assignee is changed after the task has been created—but before it is completed—the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

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

Final Steps for all Task Types

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

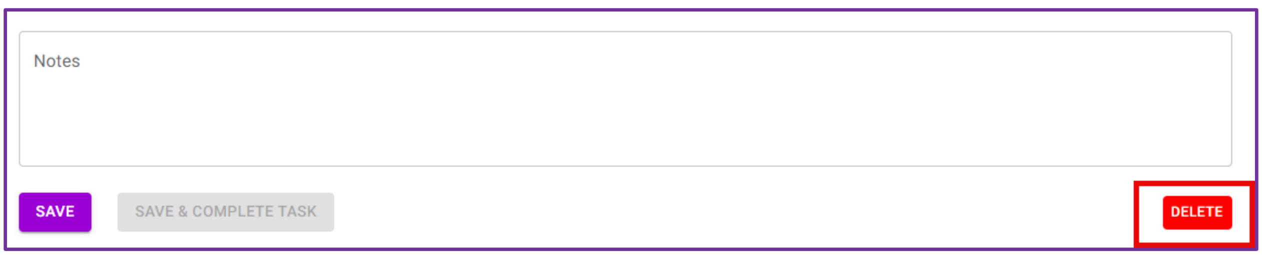
The **SAVE & COMPLETE TASK** button becomes enabled only when all required fields are completed based on the selected processing type.



Important Notes

- A completed task can be reopened if necessary.

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



Audit Tasks

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

Audit Tasks are available with all subscription plans.

Once an Audit Task is created:

- The system automatically generates the associated **comparison** for the assigned user
- This reduces manual setup and simplifies the audit process

When an Audit Task is created by an **Organization user**:

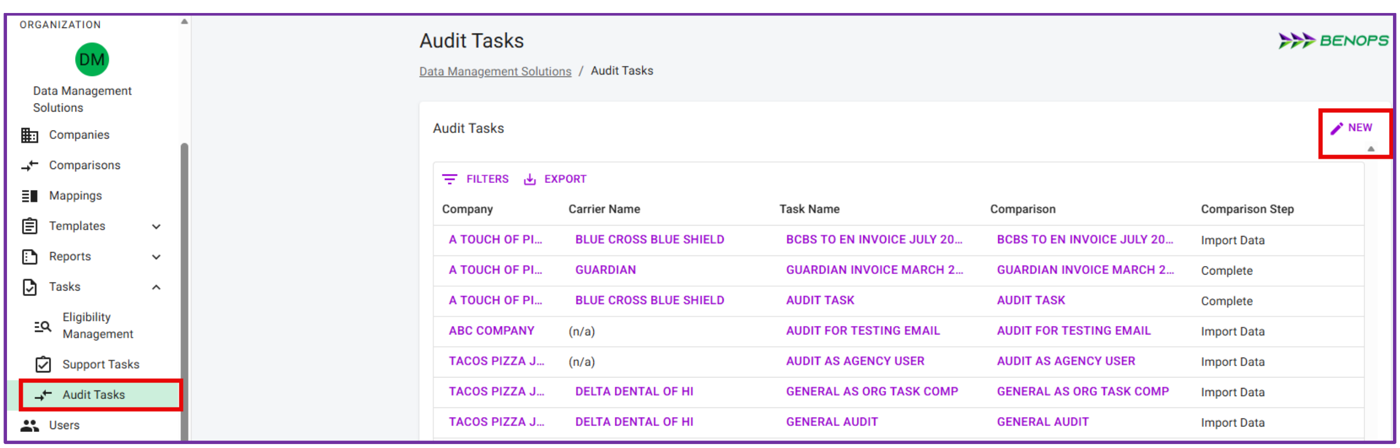
- The task is automatically assigned to the **designated Agency Support Email**
- **Agency users** can reassign the task as needed to ensure proper ownership and workflow management

After the comparison is completed:

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

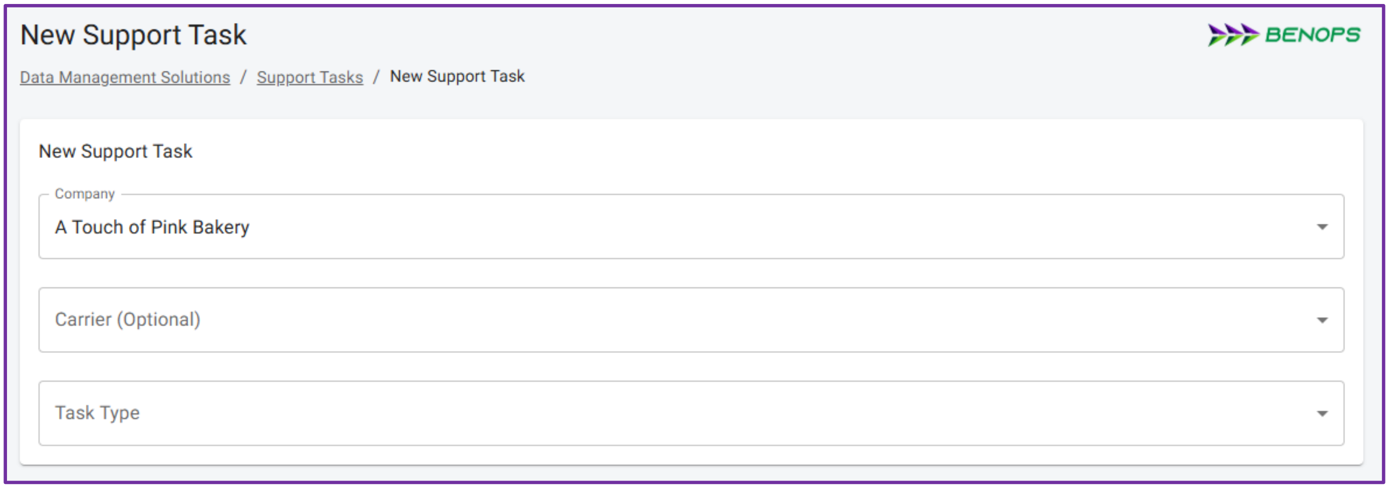
How It Works

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



3. **Company & Carrier Selection**

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



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

Required Fields for Creating an Audit Task

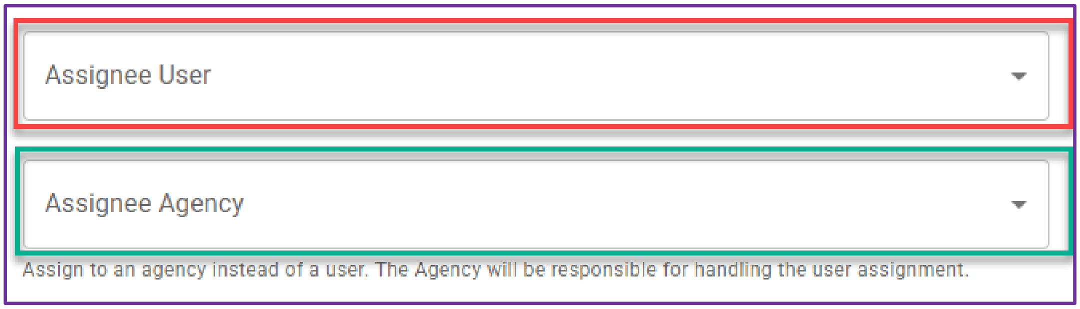
NAME: Enter a unique task name (required per company).

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

ASSIGNEE or an **ASSIGNEE AGENCY**.

- **Assignee:** Select an individual user from the dropdown menu. The list includes applicable users from the Agency Administrator connected to the Organization.
- **Assignee Agency:** Select from the agencies connected to the Organization. When an agency is selected, notifications are automatically sent to the agency's default support email address.

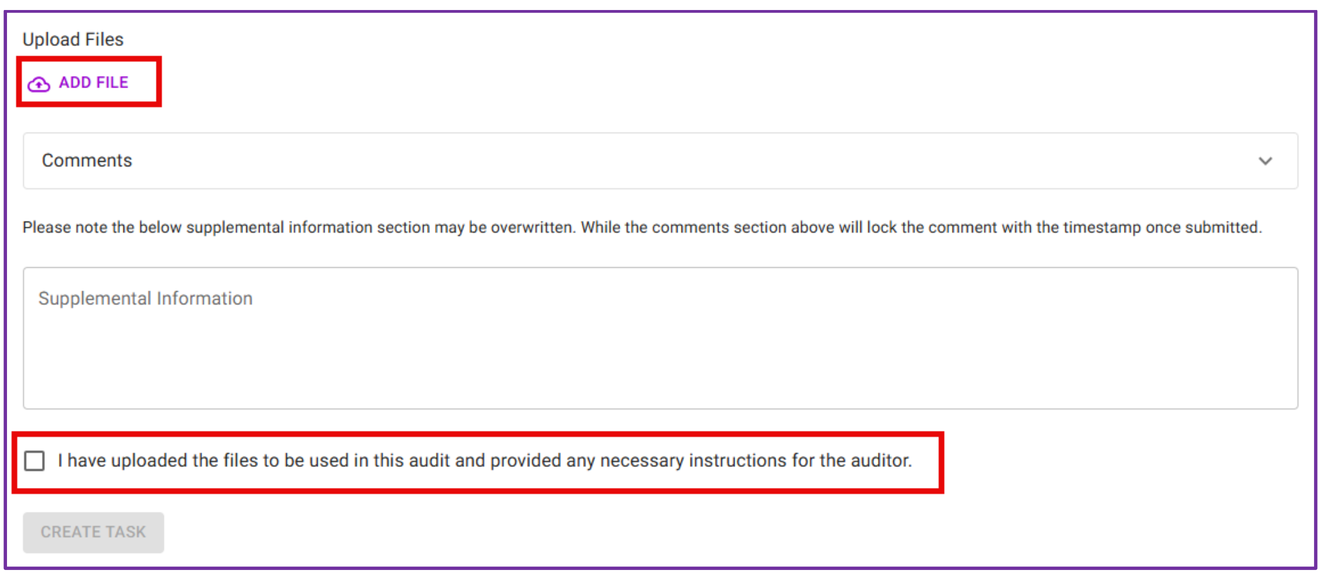
Only one assignment type can be selected at a time—either an individual user or an agency.



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

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

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

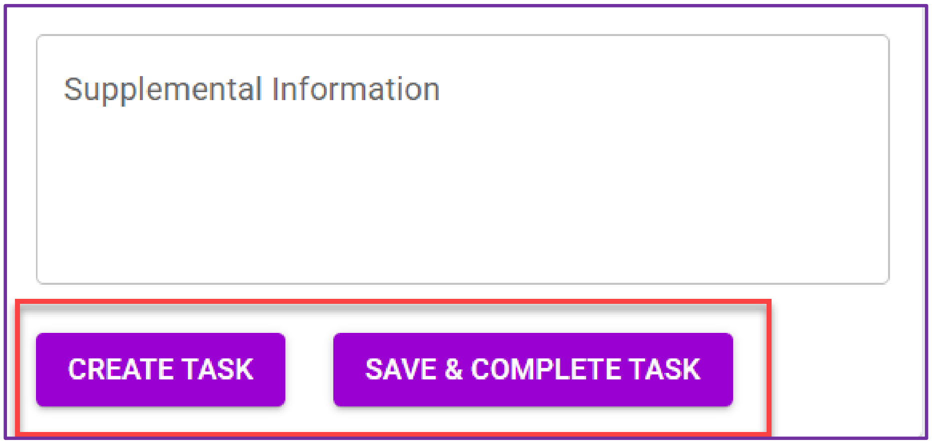


Final Steps for all Task Types

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

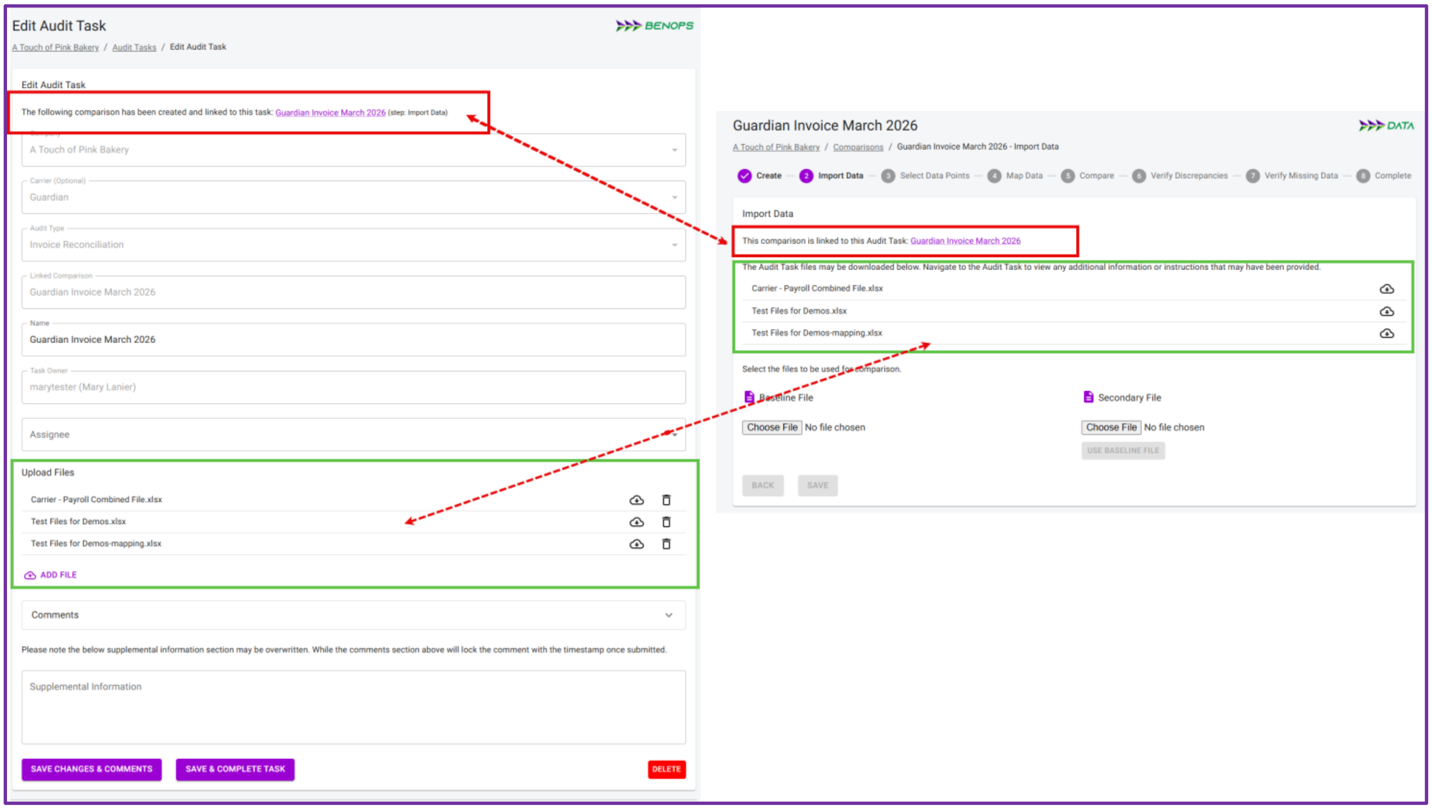
- Click **CREATE TASK** or **SAVE & COMPLETE TASK**.

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

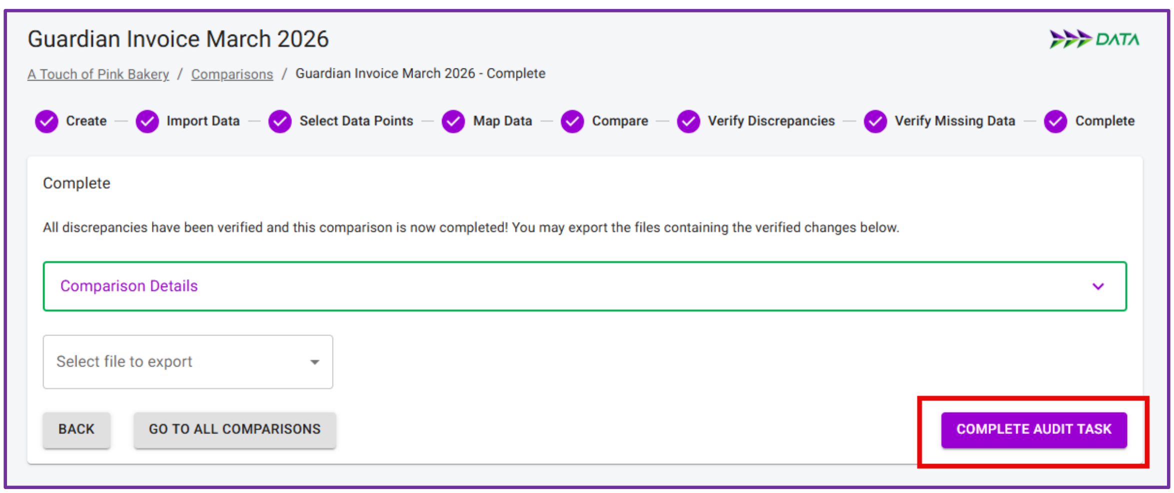


Important Notes:

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



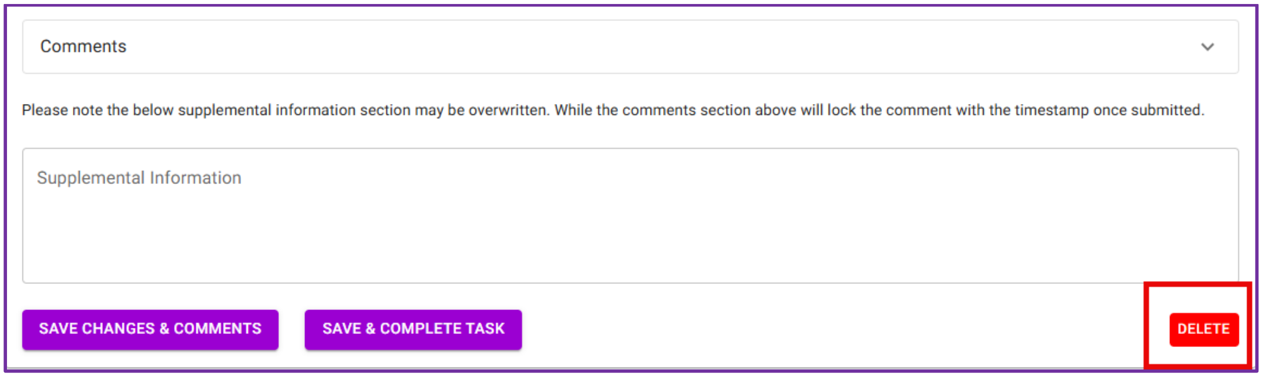
- An Agency user can close the task from the audit once complete by clicking COMPLETE AUDIT TASK.



- A completed task can be reopened if necessary.

- A completed task can be deleted but <u>ONLY</u> by an agency user.

- ***The deletion is permanent and the task cannot be restored!***



Dashboards and Notifications

Streamline's Dashboards and Notifications provide users with greater visibility into their workload, tasks, and overall business activity by centralizing important information in one location. Interactive charts throughout the application provide visual summaries of key metrics, including tasks, renewals, implementations, audit activity, and other workflow items, allowing users to quickly monitor progress, identify trends, and access the related report details.

Chart Dashboards

Streamline's interactive Chart Dashboards provide greater visibility into agency and organization data by displaying key metrics in an easy-to-understand visual format. Available throughout the application, charts allow users to monitor workload, track progress, identify trends, and quickly access the detailed records behind the data. Selecting a chart section automatically filters the associated report table, where results can be further reviewed, refined, or exported.

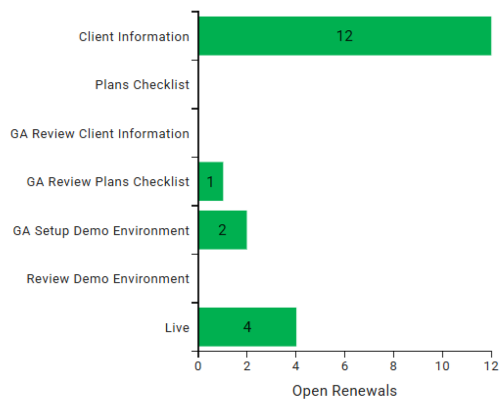
Agency and Organization dashboards provide consolidated views of tasks, renewals, implementations, audits, and other workflow activity. Users can analyze workload by task type, status, workflow step, organization, user, or date range, making it easier to prioritize work, identify bottlenecks, and make informed business decisions.

Open Tasks Dashboard:

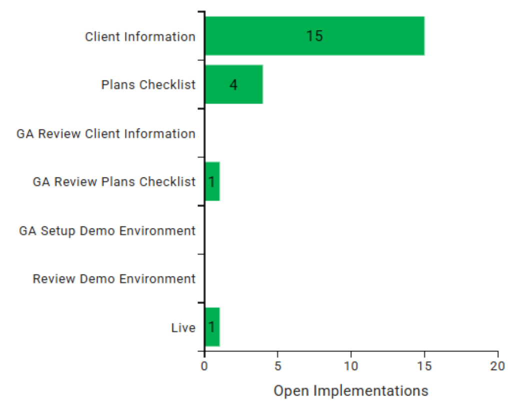
The Open Tasks dashboard provides a consolidated view of active work across the agency or organization. This dashboard displays tasks by task type and status, with Renewals and Implementations organized by their current workflow step. Agency users then can also filter dashboard results table by Organization, allowing them to focus on a specific client. All charts are interactive, allowing users to select a chart item to automatically filter and display the related records in the report table.

Open Tasks Dashboard

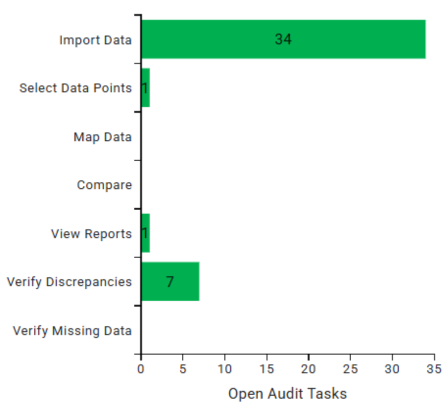
Open Renewals by Step



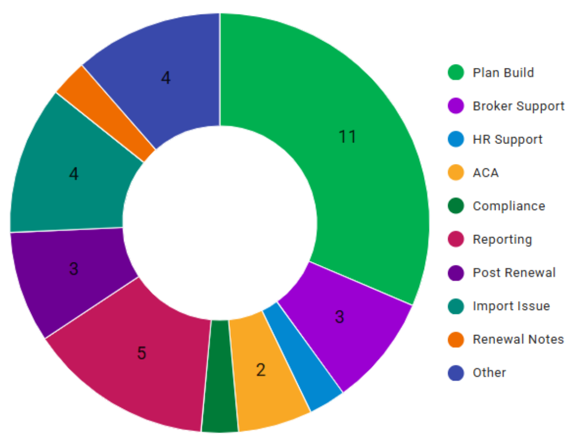
Open Implementations by Step



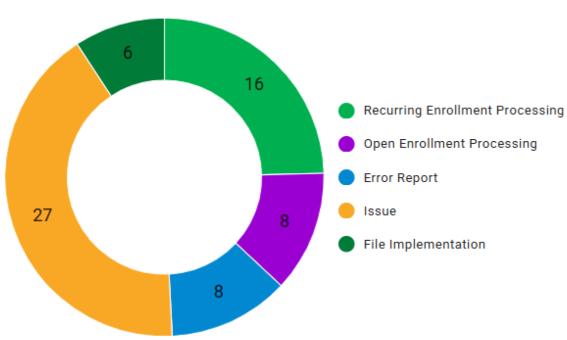
Open Audit Tasks by Comparison Step



Open Support Tasks by Type

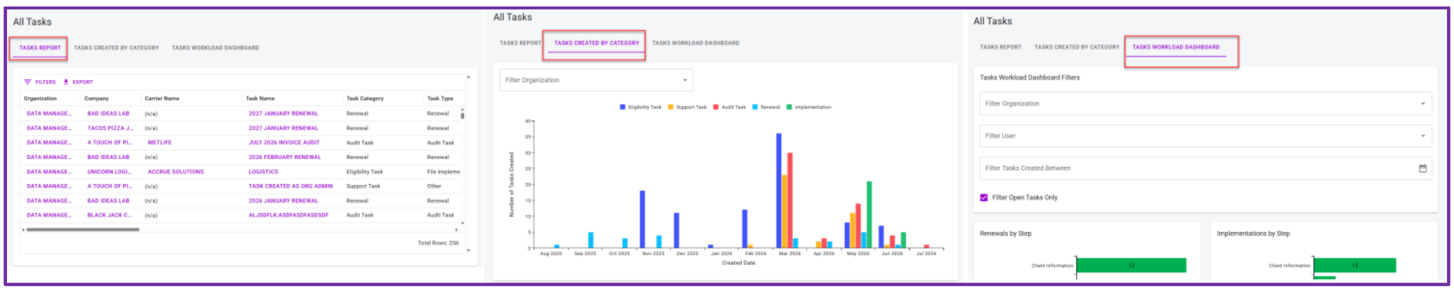


Open Eligibility Tasks by Type



All Tasks Dashboard:

The All Tasks Dashboard includes a Report table, Tasks Created by Category chart, and Tasks Workload Dashboard to provide a complete view of task activity. The Report table displays the detailed task data, while the Tasks Created by Category chart shows the number of tasks created by month, displaying a rolling 12 months of data beginning with the current month and can be filtered by Organization. The Tasks Workload Dashboard provides an overview of all tasks, renewals, and implementations and can be filtered by Organization, User, Created Between dates, and Active status. All dashboard charts are interactive, allowing users to select a chart item to automatically filter and display the corresponding records in the Report table.

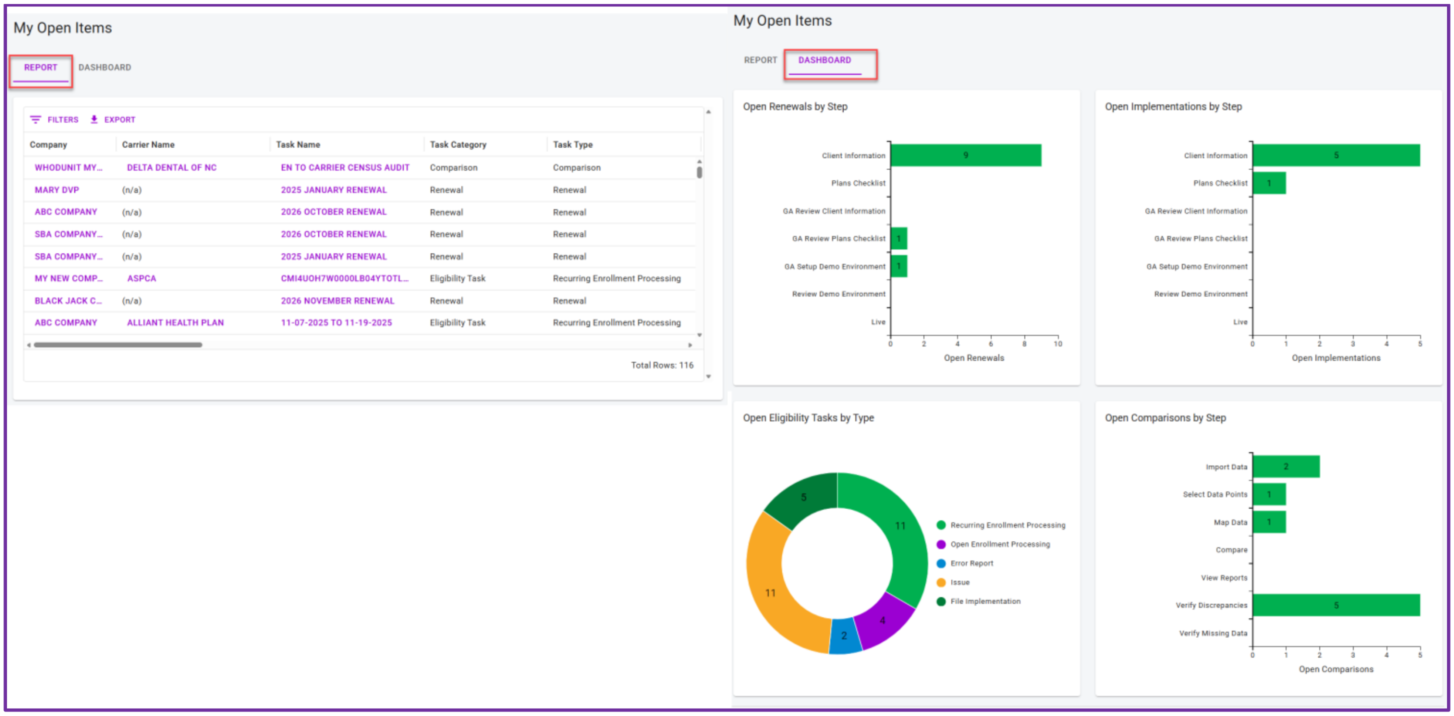


User Task Dashboards and Notifications

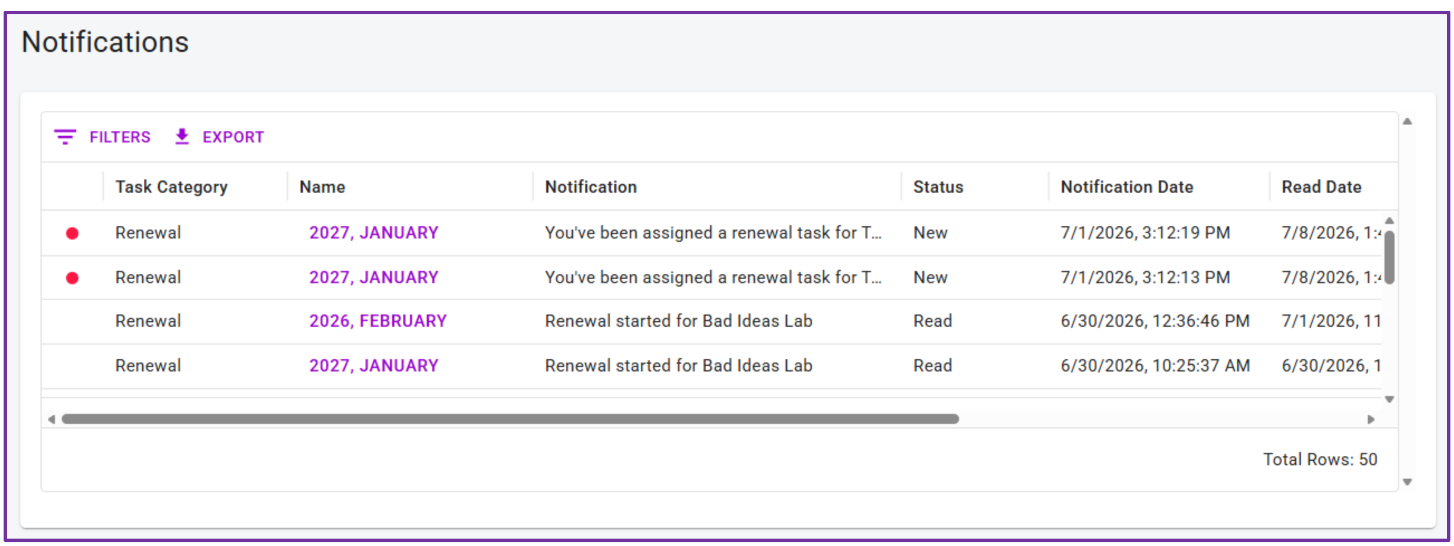
The User Task Dashboard and Notifications center provides users with a centralized location to manage their daily workload and review important system updates. The My Open Items section displays all **active** tasks where the user is involved, including items where they are the assignee, task creator, comparison verifier, or designated contact. Users can view their open work through a detailed report with tracking metrics or use dashboard charts to monitor tasks, renewals, and implementations by type, status, or workflow step.

The Notifications center, identified by the bell icon, maintains a history of task and wizard notifications when the user is included as an assignee or designated contact. New notifications are indicated on the bell icon and automatically marked as read once viewed. This feature ensures users can easily track important updates and maintain visibility into their assigned work, even if an email notification was missed or deleted.

My Open Items:



Notifications:



Carrier Invoice Conversion

The Streamline application has functionality to convert carrier invoices that are not application-friendly and require significant manual adjustments before they can be used for auditing. This conversion functionality is available to all compare users but can only be converted on the company level.

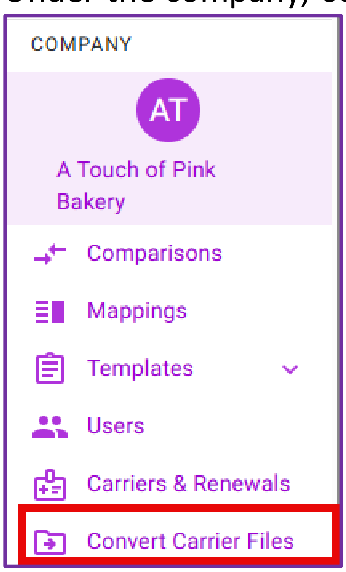
What This Functionality Does:

1. Removes adjustments and blank rows to streamline data processing.
2. Expands member names into separate columns for First Name, Last Name, and Middle Initial (MI).
3. Totals costs where benefits have separate charges on separate rows for spouse and child, such as Critical Illness and Voluntary Life.
4. Adds additional total columns for benefits that are separated in one file but combined in another. This applies to Group Life and AD&D, as well as Voluntary Life and AD&D.

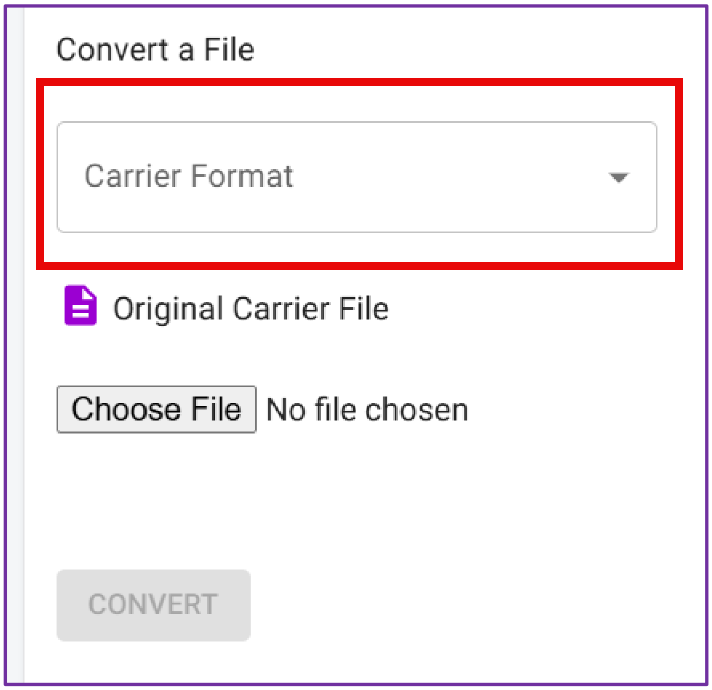
The converted file is then ready for audit use, significantly reducing manual effort and improving efficiency.

To convert a carrier invoice:

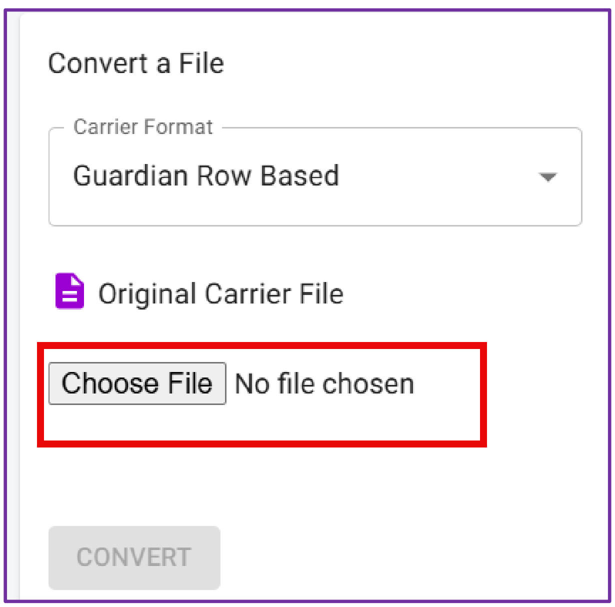
- Navigate to a company if organization user.
- Under the company, select Convert Carrier Files in the left-hand menu.



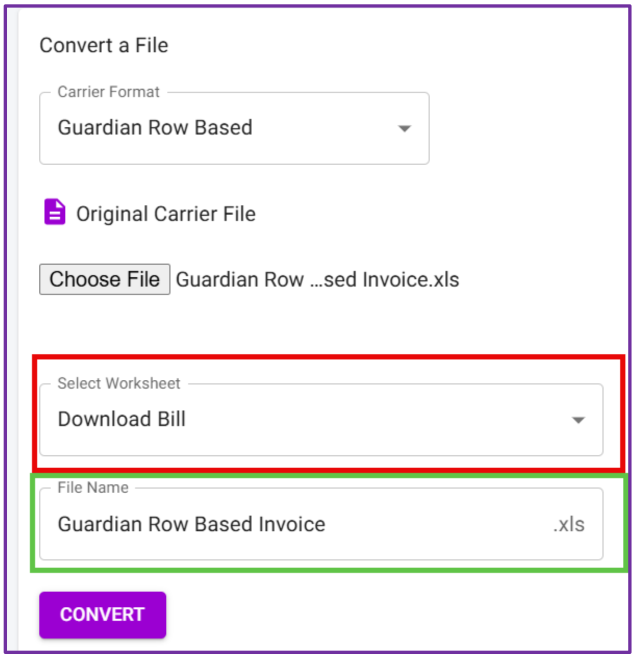
- Select Carrier Format dropdown and then the applicable carrier file.



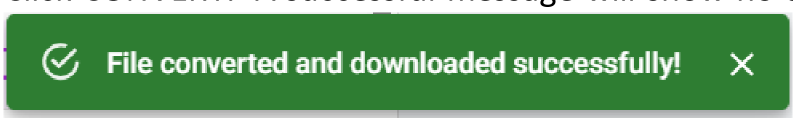
- Click Choose File and select the carrier invoice



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



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



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

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

Reports

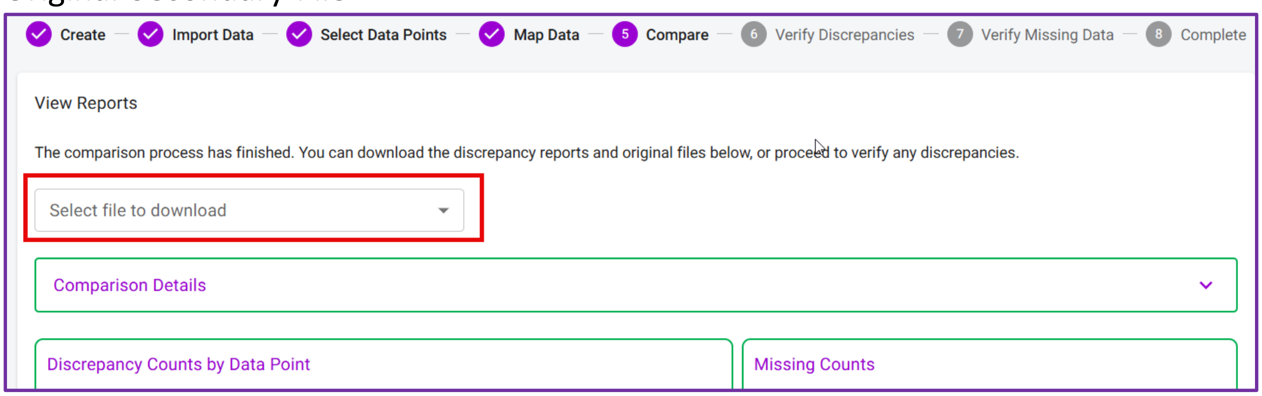
The Streamline application provides several downloadable reports:

Audit Reports

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

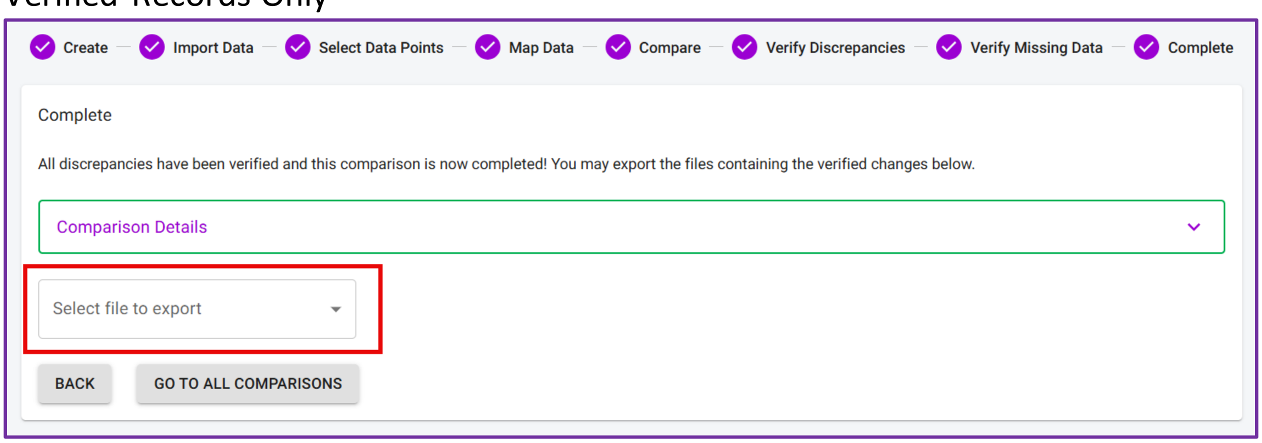
The first set of reports are available on Step 5 Compare:

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



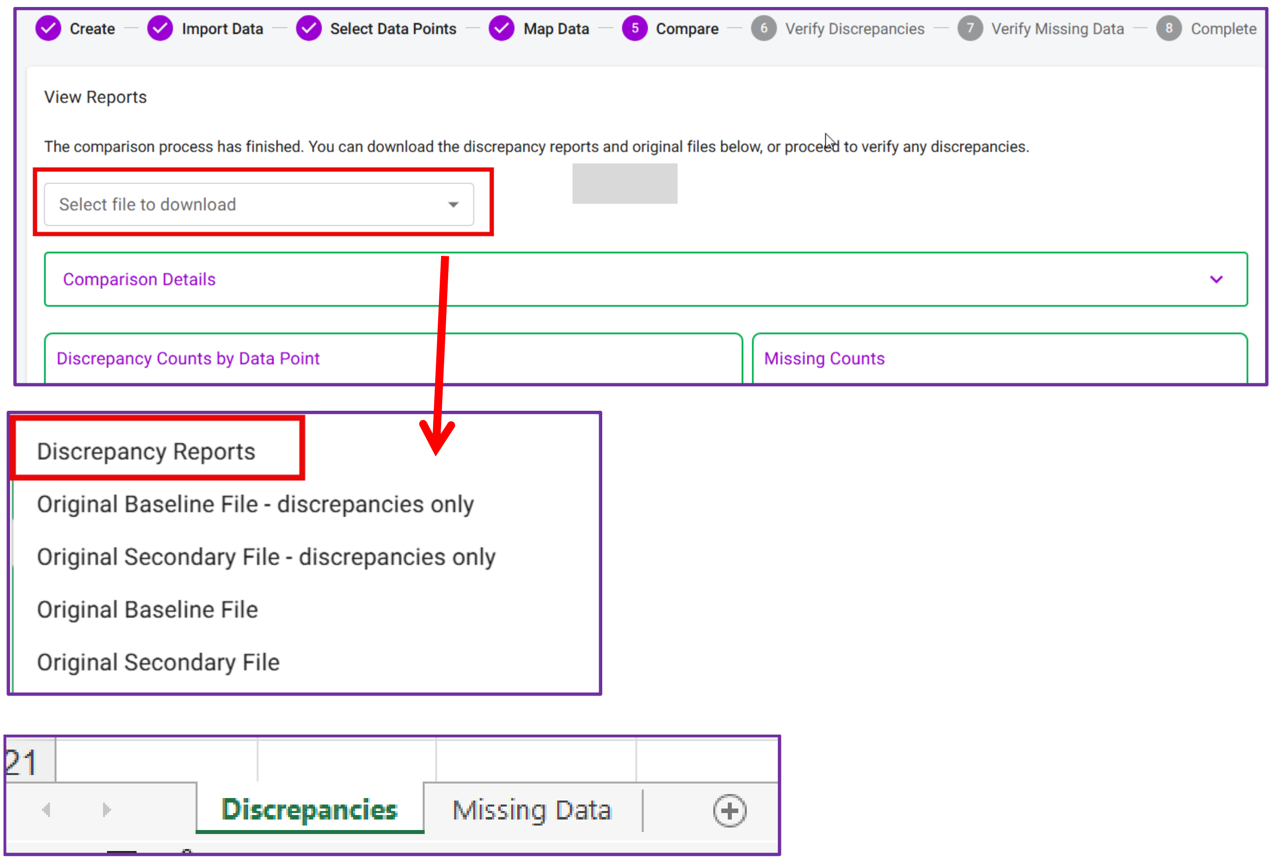
The second set of reports are available on Step 8 Complete

- All Records Including Verified
- Verified Records Only



Discrepancy Report

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



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

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

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

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

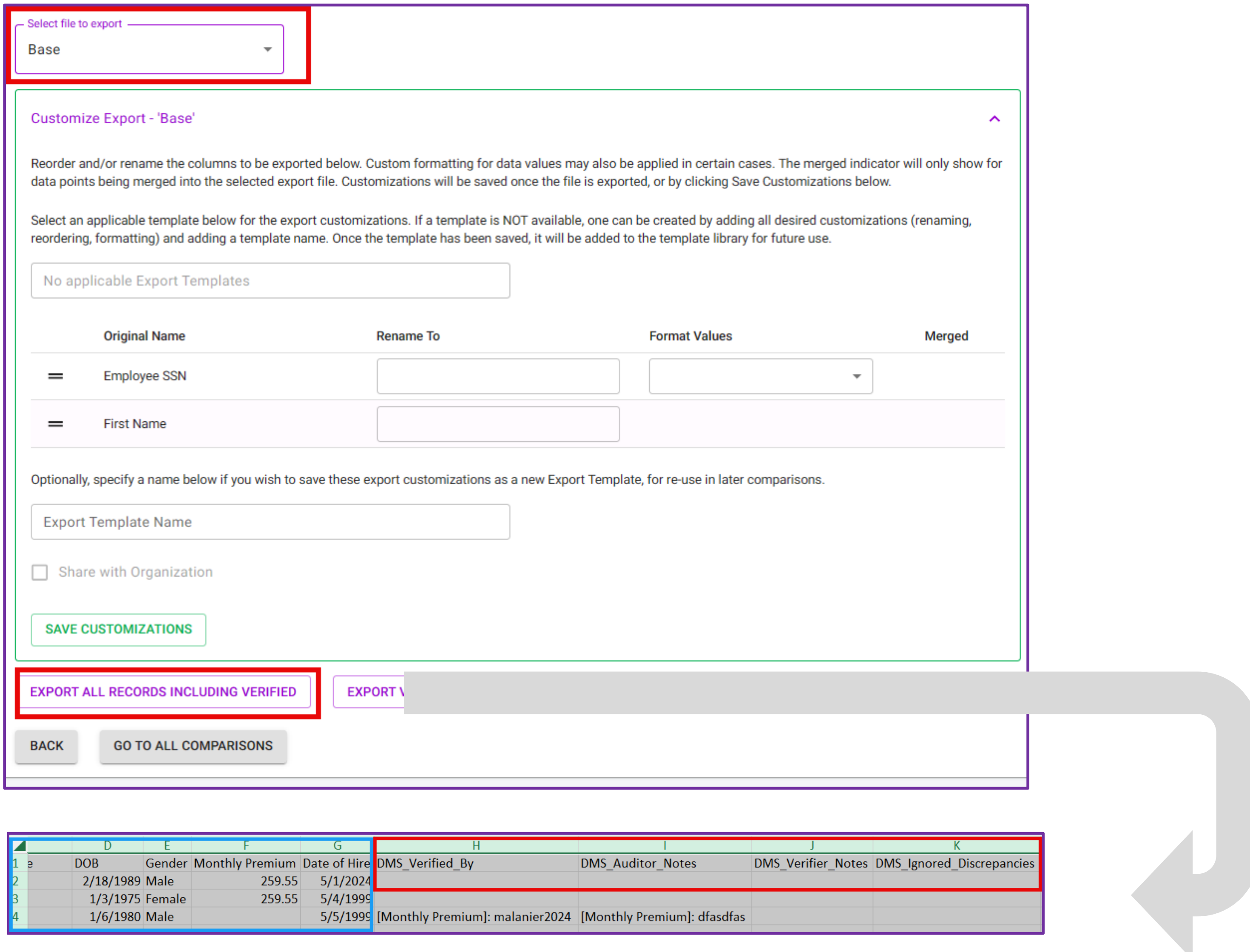
<u>Original Baseline File / Original Secondary File</u>

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.

<u>All Records Including Verified</u>

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

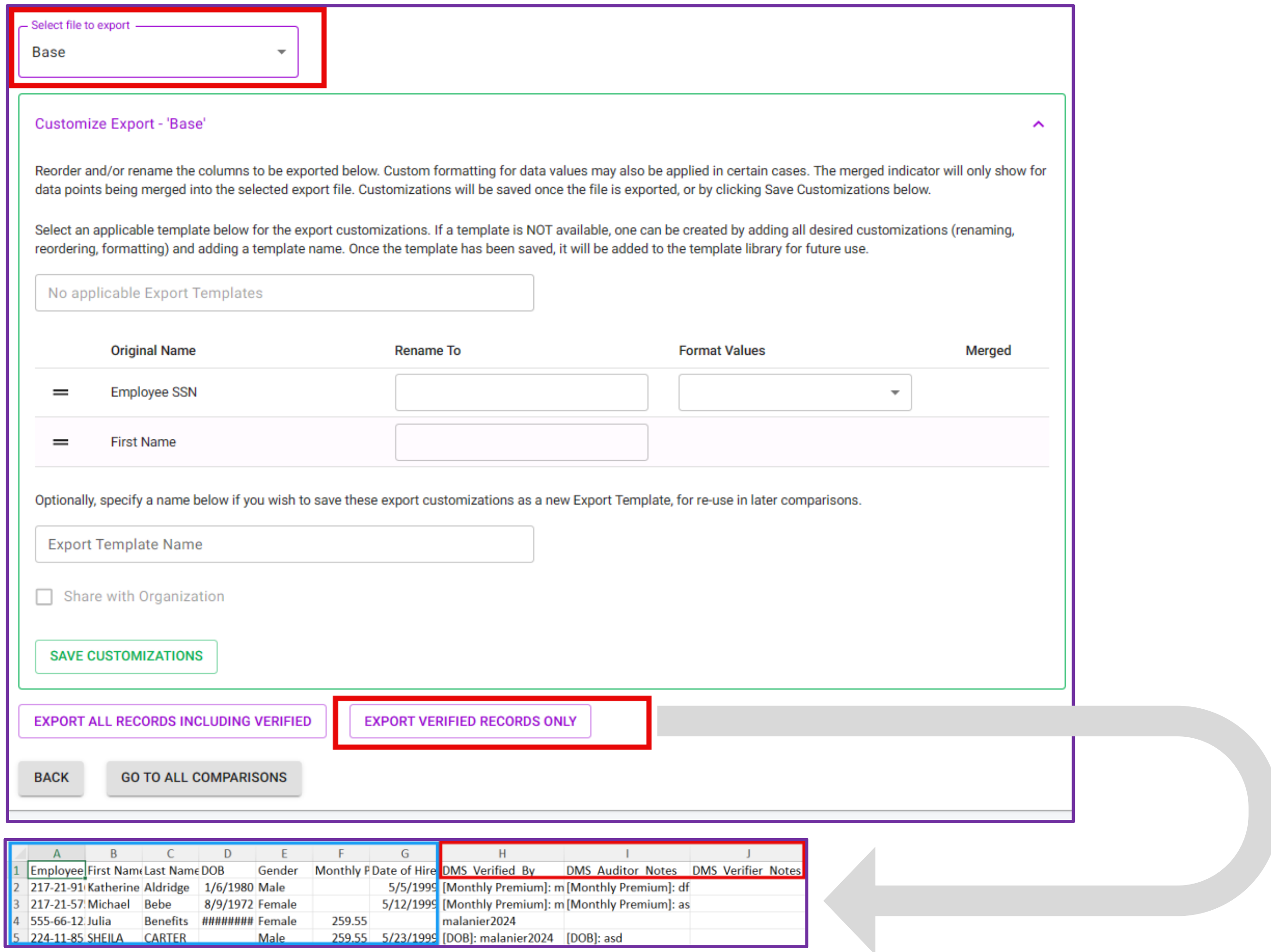
- DMS_Verified_By
- DMS_Auditor_Notes
- DMS_Verifier_Notes
- DMS_Discrepancy_Type
- DMS_Ignored_Discrepancies



<u>Verified Records only</u>

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

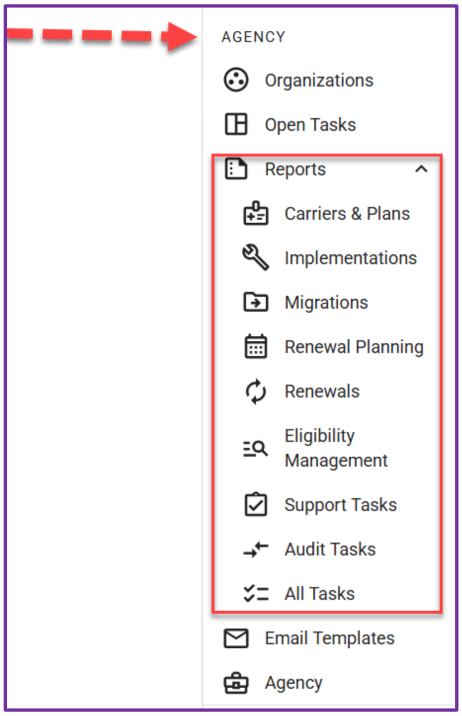
- DMS_Verified_By
- DMS_Auditor_Notes
- DMS_Verifier_Notes
- DMS_Discrepancy_Type

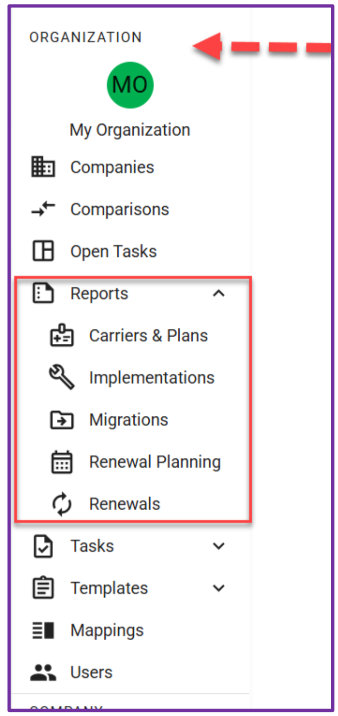


Ignored Records will **not** show in the *Verified Records only* report.

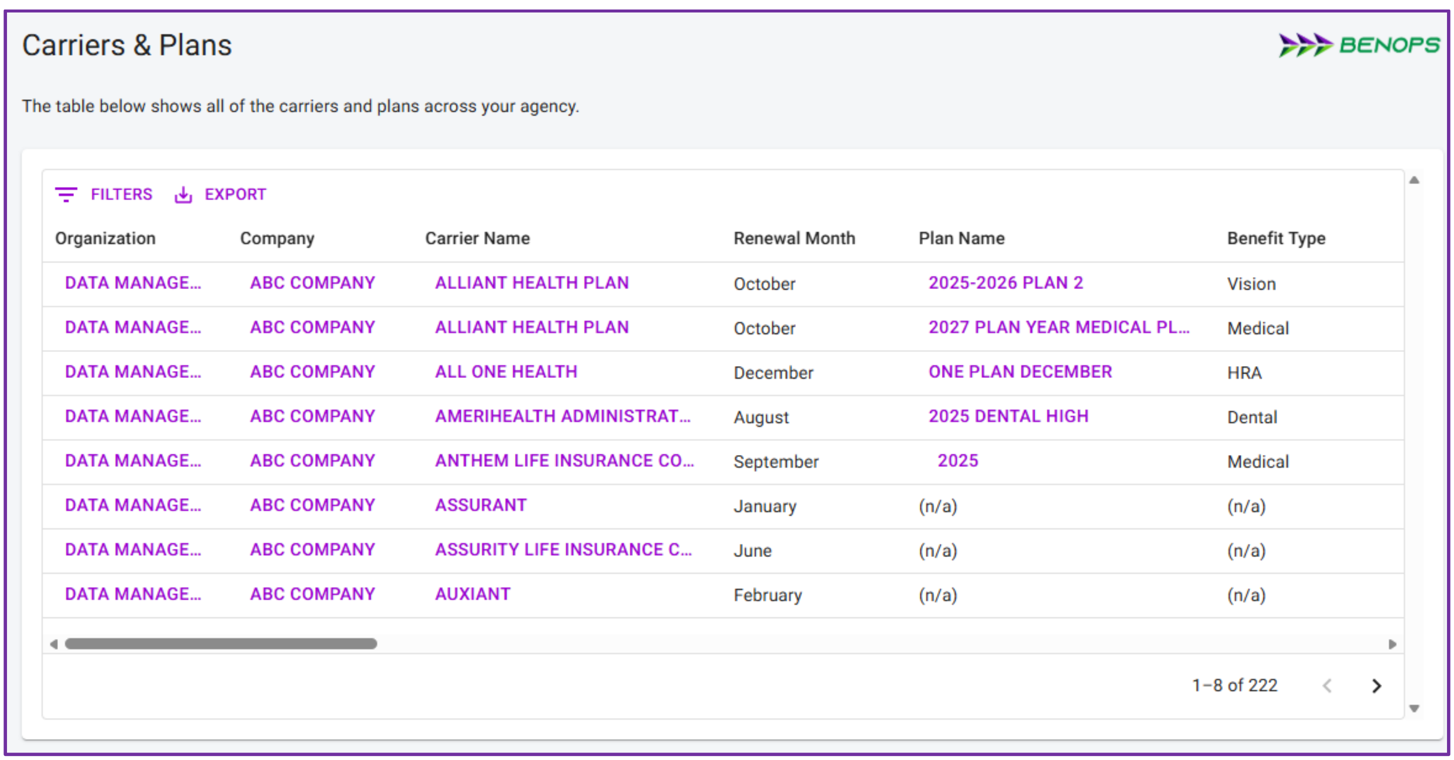
Agency and Organization Reports

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

BENOPS

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

FILTERS EXPORT

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

1–8 of 222

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

Implementations

BENOPS

IMPLEMENTATIONS REPORT | OPEN IMPLEMENTATIONS BY STEP

FILTERS | EXPORT

	Organization	Company	Implementation	Kickoff Date	Last Kickoff Reminder Sent	Current Step
VIEW	MY ORGANIZA...	THE CHAOS CO...	The Chaos Committee	8/11/2026	8/11/2026	Client Information
VIEW	BROKER B: DAT...	ALPACA YOUR ...	Alpaca Your Bags 2	8/10/2026	8/10/2026	Client Information
VIEW	BROKER B: DAT...	ALPACA YOUR ...	Alpaca Your Bags	7/16/2026	7/16/2026	Completed
VIEW	MY ORGANIZA...	BOB'S DEPART...	Bob's Department of F...	8/10/2026	8/10/2026	Client Information
VIEW	BROKER B: DAT...	KATIE DEMO	Katie Demo	8/7/2026	8/7/2026	Plans Checklist
VIEW	BROKER B: DAT...	DECEMBER DE...	December Demo Com...	8/6/2026	8/6/2026	Client Information
VIEW	MY ORGANIZA...	OTTER CHAOS	Otter Chaos	7/29/2026	7/29/2026	Completed
VIEW	MY ORGANIZA...	MILDLY IMPRE...	Mildly Impressive Ente...	7/29/2026	7/29/2026	Completed

Total Rows: 28

Migrations: This table displays a summary report of all migrations in your agency. Additional details, including the origin system, the target system, kickoff date, and more, are visible when exporting the table.

Migrations

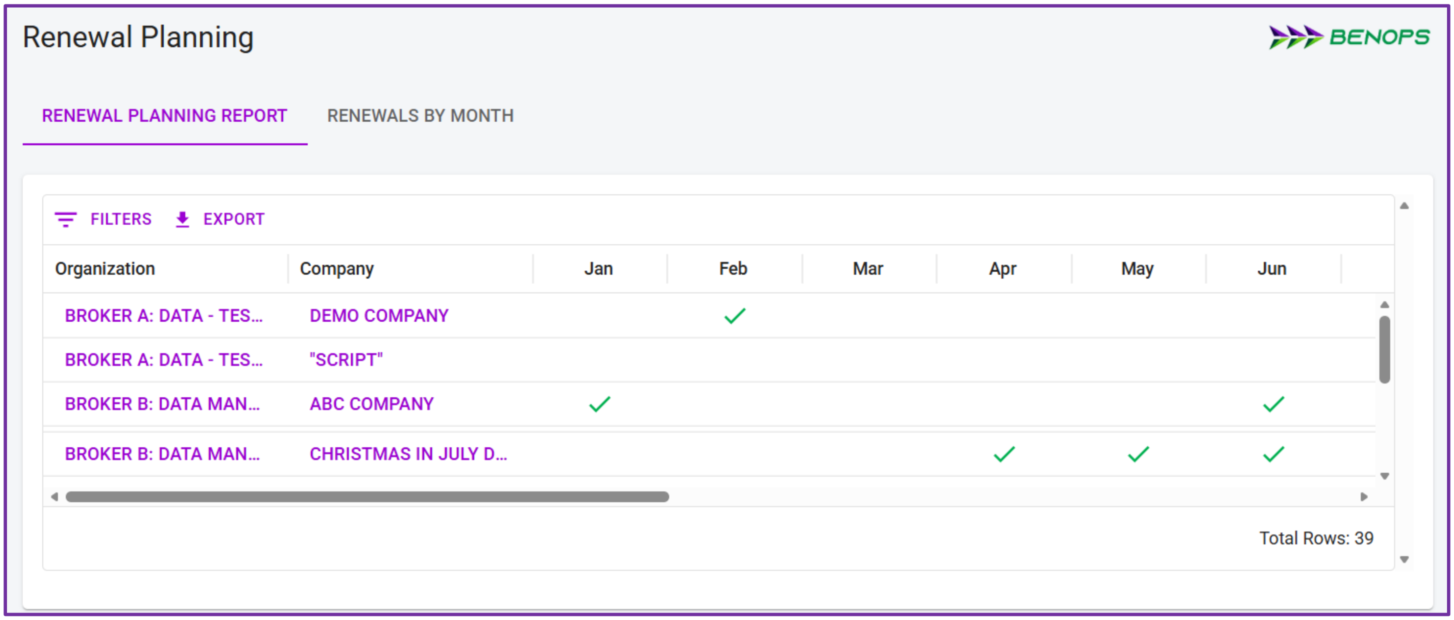
MIGRATIONS REPORT | OPEN MIGRATIONS BY STEP

FILTERS | EXPORT

	Organization	Company	Migration	Origin System	Target System	Kickoff Date	Las
VIEW	MY ORGANIZA...	MILDLY IMPRE...	Mildly Impressive Ente...	Employee Navigator	Ease	8/10/2026	8/1
VIEW	MY ORGANIZA...	THE SNEAKY S...	The Sneaky Squirrels	Ease	Employee Navigator	8/6/2026	8/6

Total Rows: 2

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



Renewal Planning

BENOPS

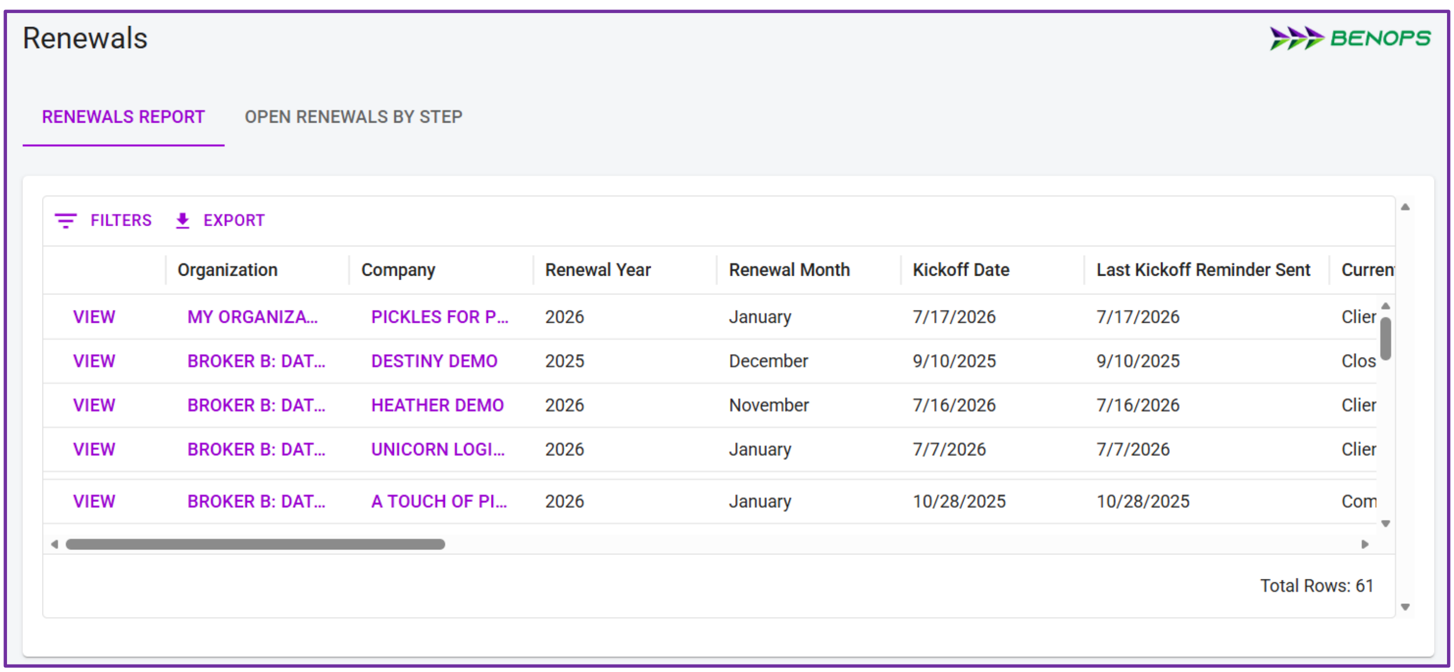
RENEWAL PLANNING REPORT | RENEWALS BY MONTH

FILTERS | EXPORT

Organization	Company	Jan	Feb	Mar	Apr	May	Jun
BROKER A: DATA - TES...	DEMO COMPANY		✓				
BROKER A: DATA - TES...	"SCRIPT"						
BROKER B: DATA MAN...	ABC COMPANY	✓					✓
BROKER B: DATA MAN...	CHRISTMAS IN JULY D...				✓	✓	✓

Total Rows: 39

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



Renewals

BENOPS

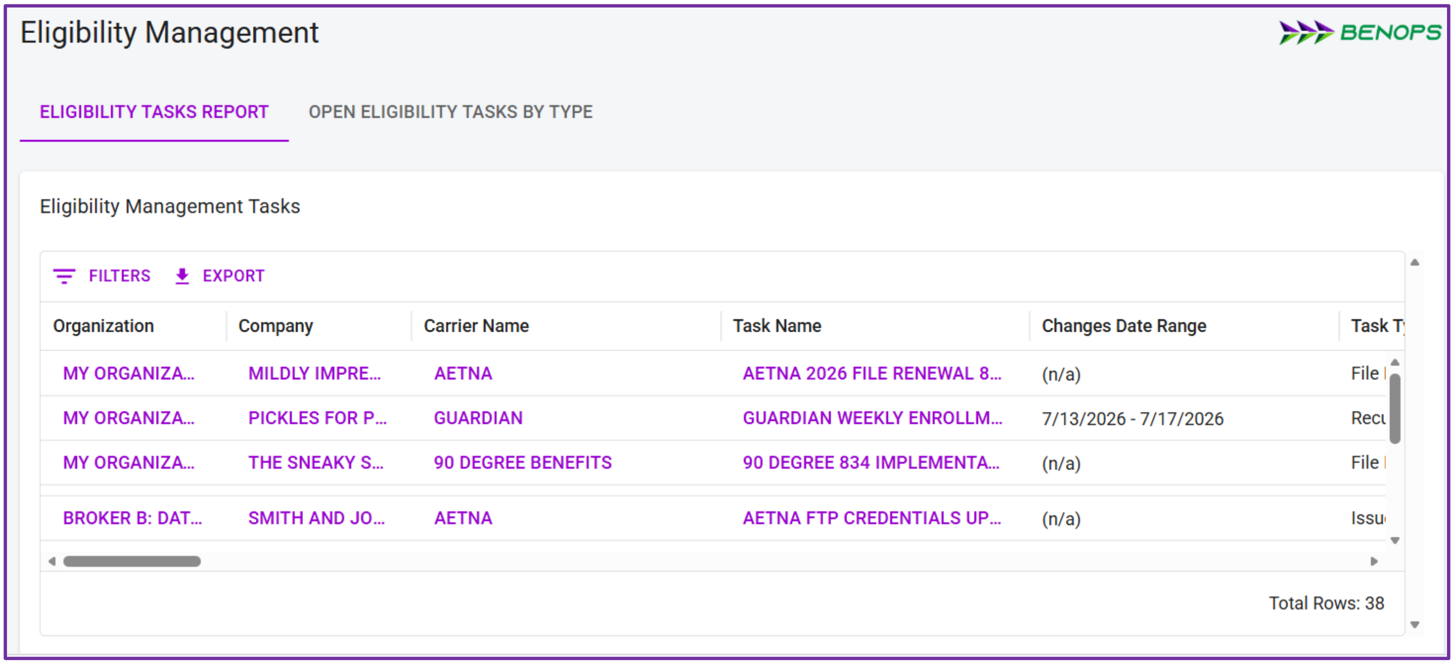
RENEWALS REPORT | OPEN RENEWALS BY STEP

FILTERS | EXPORT

	Organization	Company	Renewal Year	Renewal Month	Kickoff Date	Last Kickoff Reminder Sent	Curren
VIEW	MY ORGANIZA...	PICKLES FOR P...	2026	January	7/17/2026	7/17/2026	Clier
VIEW	BROKER B: DAT...	DESTINY DEMO	2025	December	9/10/2025	9/10/2025	Clos
VIEW	BROKER B: DAT...	HEATHER DEMO	2026	November	7/16/2026	7/16/2026	Clier
VIEW	BROKER B: DAT...	UNICORN LOGI...	2026	January	7/7/2026	7/7/2026	Clier
VIEW	BROKER B: DAT...	A TOUCH OF PI...	2026	January	10/28/2025	10/28/2025	Com

Total Rows: 61

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

ELIGIBILITY TASKS REPORT | OPEN ELIGIBILITY TASKS BY TYPE

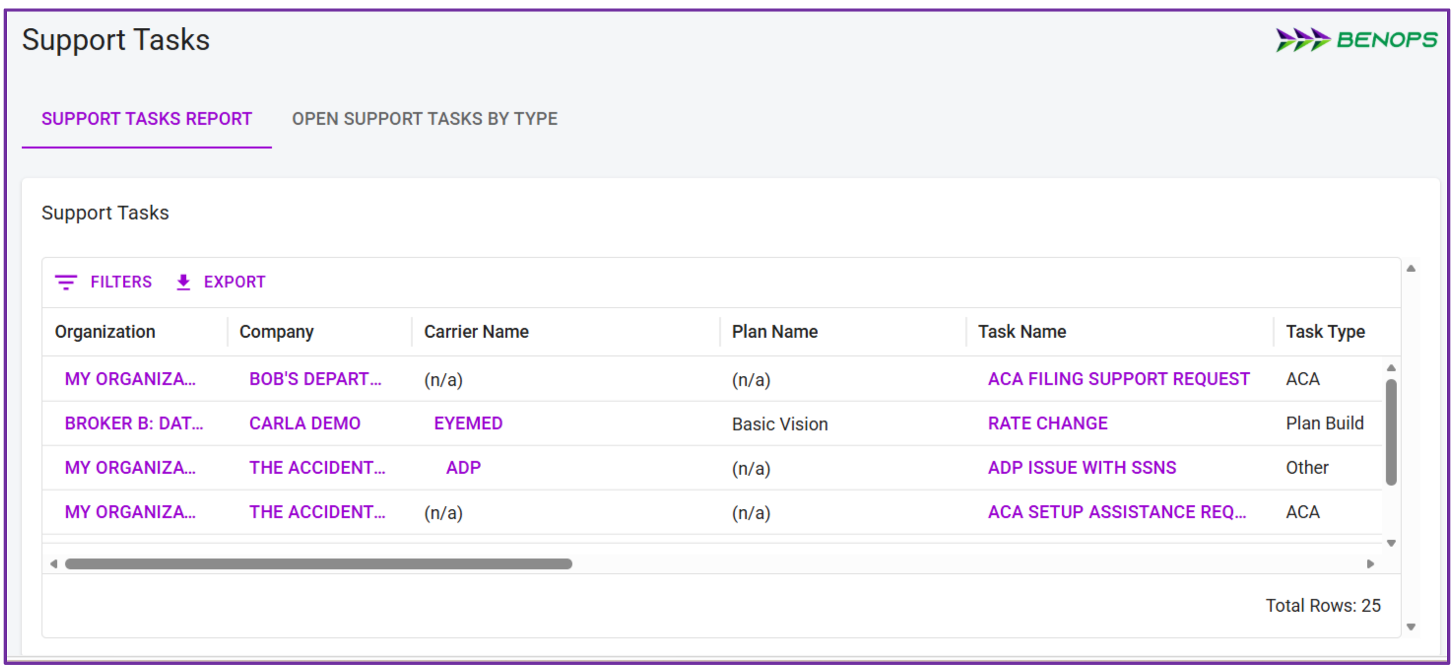
Eligibility Management Tasks

FILTERS | EXPORT

Organization	Company	Carrier Name	Task Name	Changes Date Range	Task T
MY ORGANIZA...	MILDLY IMPRE...	AETNA	AETNA 2026 FILE RENEWAL 8...	(n/a)	File I
MY ORGANIZA...	PICKLES FOR P...	GUARDIAN	GUARDIAN WEEKLY ENROLLM...	7/13/2026 - 7/17/2026	Recu
MY ORGANIZA...	THE SNEAKY S...	90 DEGREE BENEFITS	90 DEGREE 834 IMPLEMENTA...	(n/a)	File I
BROKER B: DAT...	SMITH AND JO...	AETNA	AETNA FTP CREDENTIALS UP...	(n/a)	Issu

Total Rows: 38

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

SUPPORT TASKS REPORT | OPEN SUPPORT TASKS BY TYPE

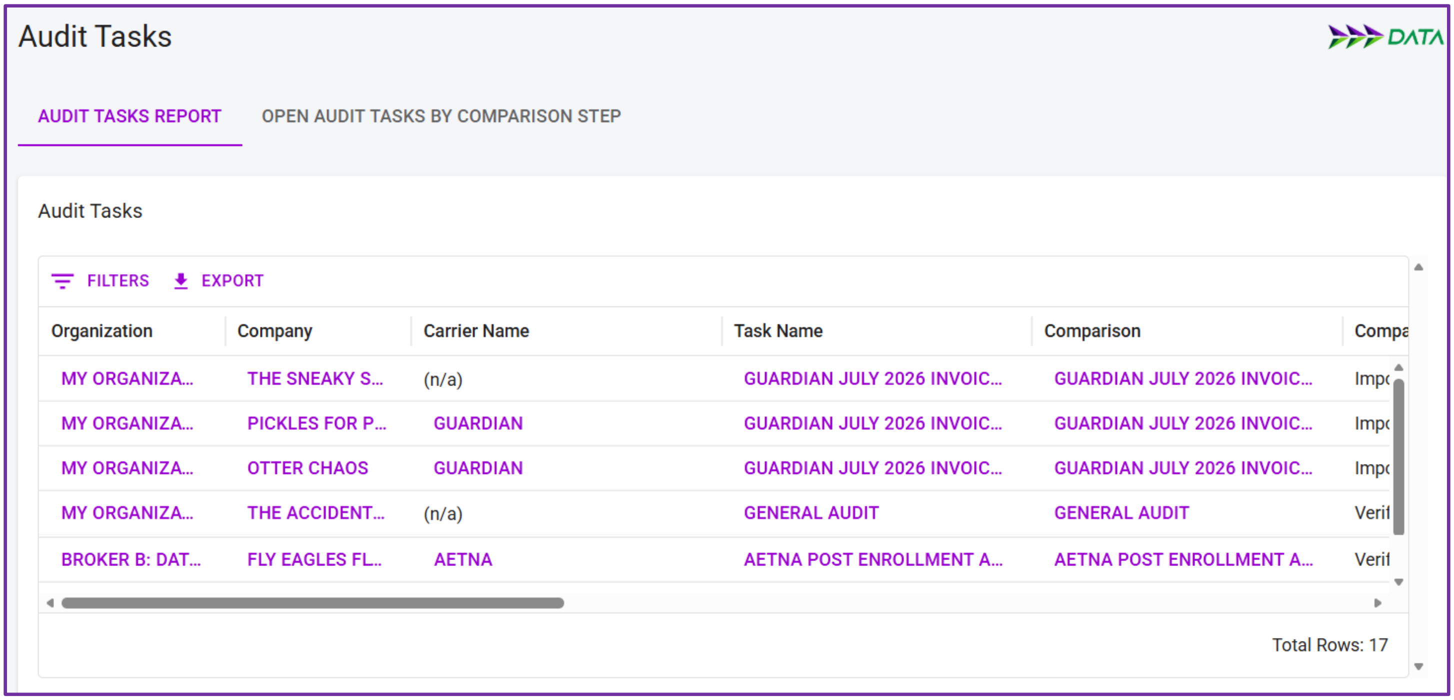
Support Tasks

FILTERS | EXPORT

Organization	Company	Carrier Name	Plan Name	Task Name	Task Type
MY ORGANIZA...	BOB'S DEPART...	(n/a)	(n/a)	ACA FILING SUPPORT REQUEST	ACA
BROKER B: DAT...	CARLA DEMO	EYEMED	Basic Vision	RATE CHANGE	Plan Build
MY ORGANIZA...	THE ACCIDENT...	ADP	(n/a)	ADP ISSUE WITH SSNS	Other
MY ORGANIZA...	THE ACCIDENT...	(n/a)	(n/a)	ACA SETUP ASSISTANCE REQ...	ACA

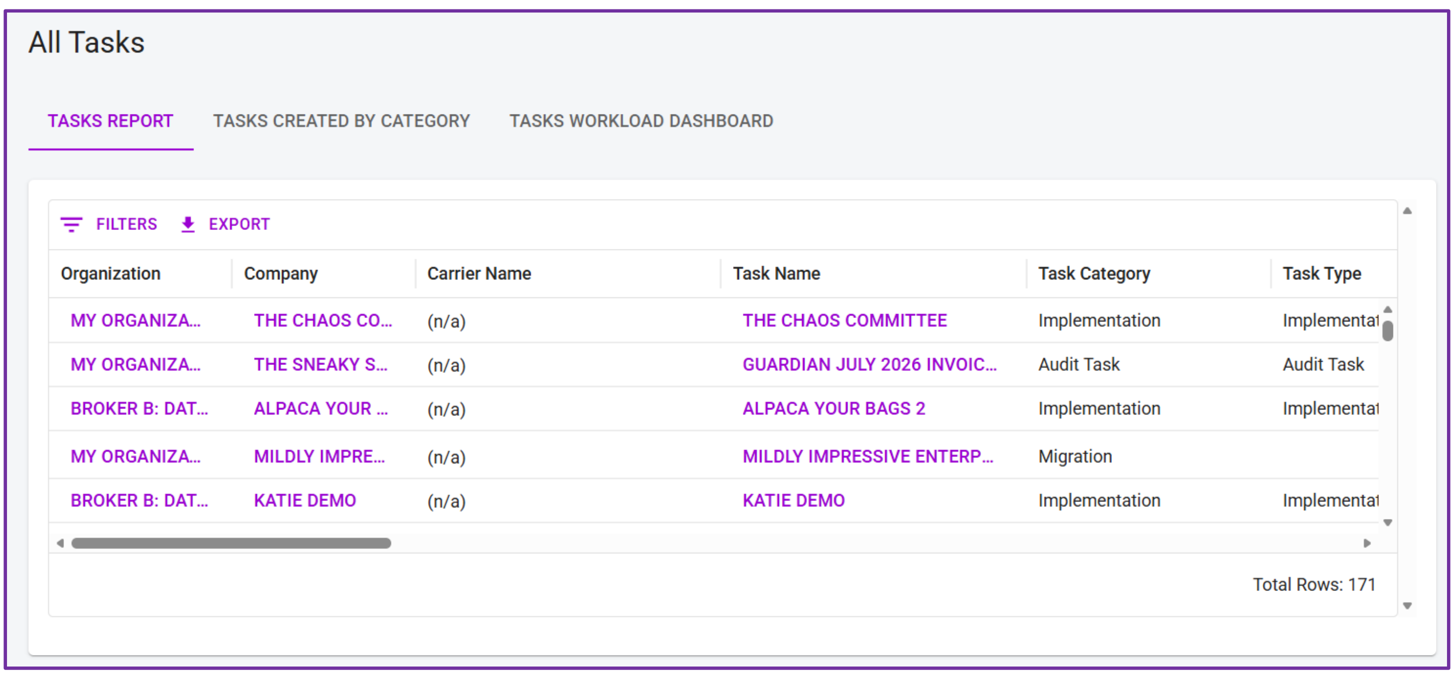
Total Rows: 25

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.



Organization	Company	Carrier Name	Task Name	Comparison	Compa
MY ORGANIZA...	THE SNEAKY S...	(n/a)	GUARDIAN JULY 2026 INVOIC...	GUARDIAN JULY 2026 INVOIC...	Impo
MY ORGANIZA...	PICKLES FOR P...	GUARDIAN	GUARDIAN JULY 2026 INVOIC...	GUARDIAN JULY 2026 INVOIC...	Impo
MY ORGANIZA...	OTTER CHAOS	GUARDIAN	GUARDIAN JULY 2026 INVOIC...	GUARDIAN JULY 2026 INVOIC...	Impo
MY ORGANIZA...	THE ACCIDENT...	(n/a)	GENERAL AUDIT	GENERAL AUDIT	Verif
BROKER B: DAT...	FLY EAGLES FL...	AETNA	AETNA POST ENROLLMENT A...	AETNA POST ENROLLMENT A...	Verif

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.



Organization	Company	Carrier Name	Task Name	Task Category	Task Type
MY ORGANIZA...	THE CHAOS CO...	(n/a)	THE CHAOS COMMITTEE	Implementation	Implementat
MY ORGANIZA...	THE SNEAKY S...	(n/a)	GUARDIAN JULY 2026 INVOIC...	Audit Task	Audit Task
BROKER B: DAT...	ALPACA YOUR ...	(n/a)	ALPACA YOUR BAGS 2	Implementation	Implementat
MY ORGANIZA...	MILDLY IMPRE...	(n/a)	MILDLY IMPRESSIVE ENTERP...	Migration	
BROKER B: DAT...	KATIE DEMO	(n/a)	KATIE DEMO	Implementation	Implementat

Key Words

The application has key words that it utilizes to determine a match between columns. These key words are:

SSN:

- ssn
- social security number
- socialsecuritynumber
- ss#
- social security #
- ee id
- social security no
- memberid

First Name:

- first name
- firstname
- first_name
- fname

Last Name:

- last name
- lastname

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

Address:

- Address
- Address 1
- Address 2
- Address
- ADDRESS LINE 1
- ADDRESS LINE 2
- Street Address

Knowledge Base

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

Streamline Knowledge Base | Streamline by DMS

Benefit Systems

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

Streamline Data Frequently Used Systems | Streamline by DMS

Release Notes

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

Release Notes Log | Streamline by DMS

Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
Draft 1	06/01/2021	New document	Mary Lanier
1.0	06/01/2021	Approved document	Mary Lanier
2.0	03/21/2023	Updated instructions for Template Enhancements	Mary Lanier
2.1	07/24/2023	Updated instructions for Additional User Types, Inactivate Users. Added "memberid" to SSN keyword, Added Sample registration email	Mary Lanier
2.2	11/29/2023	Updated email address from datatool@brokerbuildersolutions.com to support@dms-datavalidate.com	Mary Lanier
2.3	03/26/2024	Updated logo and added additional instructions for moving templates to the organization level. Updated website references for new website.	Mary Lanier
2.4	05/24/2024	Updated verbiage to include masked social security number and how to assign a verifier. Also included notification emails to verifier and to auditor	Mary Lanier
2.5	07/09/2024	Updated to include carrier tracking enhancement	Mary Lanier
2.6	10/15/2024	Added verbiage to include discrepancy type dropdown, additional field to the carrier tracking information, and termination company date	Mary Lanier
2.7	12/05/2024	Updated with new enhancements including additional discrepancy reports and customized emails	Mary Lanier
2.8	02/18/2025	Updated to include the Carrier Invoice Conversion functionality	Mary Lanier
2.9	05/20/2025	Updated to include Plan Information and additional fields	Mary Lanier
3.0	06/12/2025	Updated import functionality for carrier, carrier plans, and company	Mary Lanier
4.0	10/23/2025	Updated images	Mary Lanier
5.0	12/05/2025	Updated Eligibility Management Tracking	Mary Lanier

6.0	01/05/2026	Rebrand, Mapping, Rounding Variance, Additional task type to EMT	Mary Lanier
7.0	03/30/2026	Audit and Support tasks – Release Notes 03-24-2026 and 02/18/2026	Mary Lanier
8.0	06/17/2026	Release notes for 05/22/2026	Mary Lanier
9.0	07/08/2026	Release notes for 07/10/2026	Mary Lanier
10.0	08/10/2026	Release notes for 08/10/2026	Mary Lanier